



randstad
capital markets day.

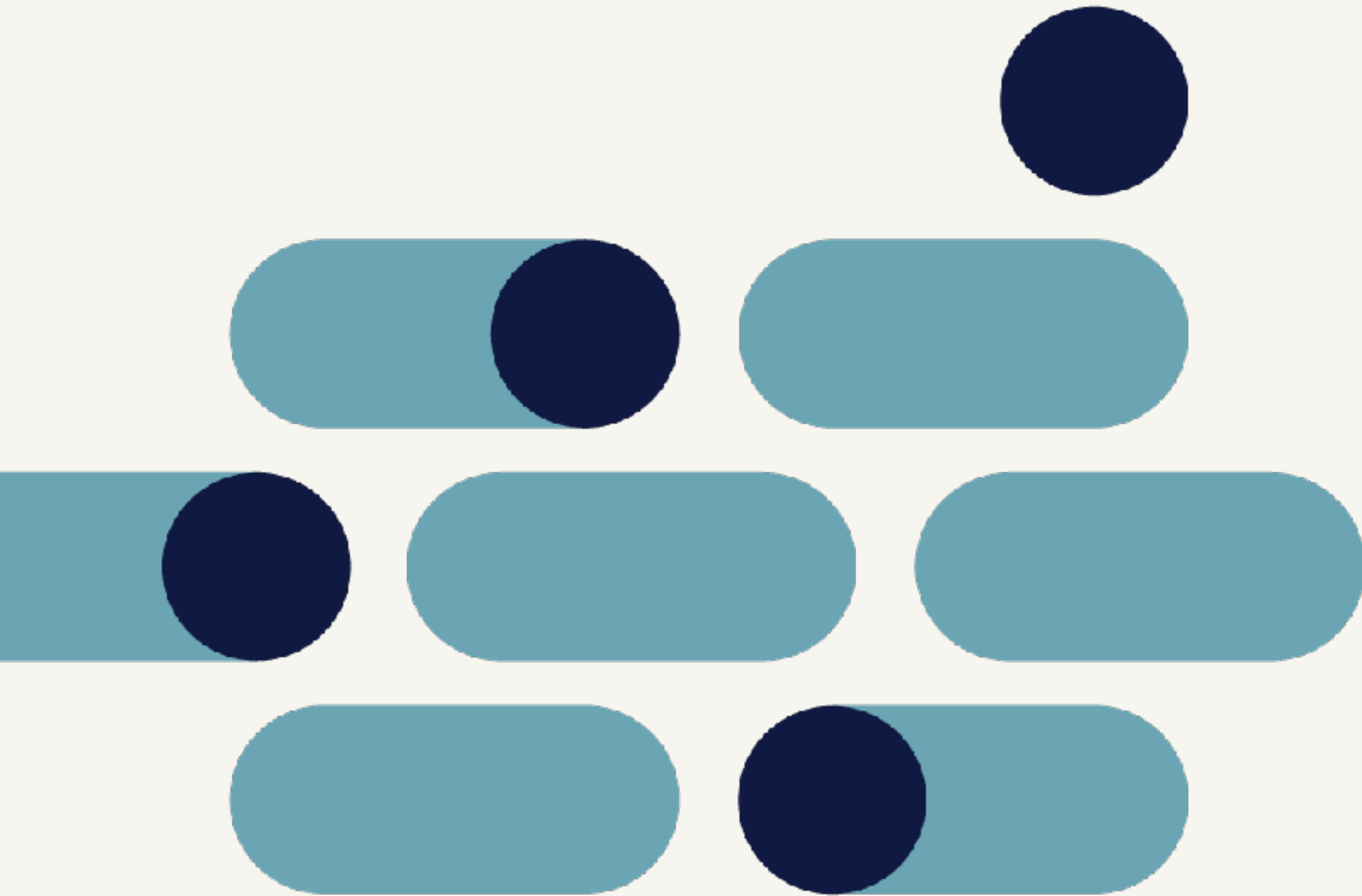
17 november 2021



capital markets
day 2021.

Certain statements in this document concern prognoses about the future financial condition, risks, investment plans, and the results of operations of Randstad N.V. and its operating companies, as well as certain plans and objectives. Obviously, such prognoses involve risks and a degree of uncertainty, since they concern future events and depend on circumstances that will apply then. Many factors may contribute to the actual results and developments differing from the prognoses made in this document. These factors include, but are not limited to, general economic conditions, shortages on the job market, changes in the demand for personnel (including flexible personnel), achievement of cost savings,

changes in the business mix, changes in legislation (particularly in relation to employment, staffing and tax laws), the role of industry regulators, future currency and interest fluctuations, availability of credit on financially acceptable terms, the successful completion of company acquisitions and their subsequent integration, successful disposals of companies, the rate of technological developments, the impact of pandemics and our ability to identify other relevant risks and mitigate their impact. These prognoses therefore apply only on the date on which this document was compiled. The quarterly results as presented in this press release are unaudited.



EBITA: operating profit before amortization and impairment acquisition-related intangible assets and goodwill, integration costs and one-offs.

organic growth is measured excluding the impact of currency effects, acquisitions, disposals and reclassifications.

diluted EPS is measured before amortization and impairment acquisition-related intangible assets and goodwill, integration costs and one-offs.

program.

market trends & strategy: Jacques van den Broek

value creation: Henry Schirmer

digitizing & IT: René Steenvoorden

global businesses: Rebecca Henderson

professionals: Karen Fichuk

staffing & randstad culture: Chris Heutink

Q&A

closing remarks: Jacques van den Broek



market trends

& strategy.



market trends & strategy.

- introduction
- structural trends
- randstad positioned for growth
- differentiated through Tech and Touch



Jacques van den Broek
Randstad, CEO

welcome to Randstad virtual CMD

Utrecht (NL) branch.



why are we here today?

- demonstrated through the pandemic: our industry is more relevant than ever
- traditional recruitment process is changing
- attractive market with structural growth opportunities
- Randstad is well positioned for further growth and creating sustainable value:
 - leveraging our data-driven insights and unrivalled scale and breadth of services
 - we combine Tech and Touch to make our offer unique

structural

trends.



acceleration of major labor market trends through COVID-19.
randstad well positioned to continue to take advantage.

change is the
new norm

unprecedented
speed of
technological
progress

a job for life?

the role of
work in
people's lives
is a constant



randstad

positioned
for growth.



capital markets
day 2021.



touch the work lives
of 500 million people
worldwide by 2030.



committed to sustainable value creation.

good jobs and economic growth

8 GOOD JOBS AND ECONOMIC GROWTH



reduced inequalities

10 REDUCED INEQUALITIES



gender equality

5 GENDER EQUALITY



quality education

4 QUALITY EDUCATION



climate action

13 CLIMATE ACTION



a differentiated strategy becoming the world's most valued 'work life partner'.

touch the work lives of 500 million people worldwide by 2030



support as many people as possible in realizing their true potential throughout their working life

further differentiate through tech and touch



leverage global collaboration



unlock the power of our data



prioritize talent experience

create value through our portfolio



expand presence in concepts and geographies



lead in winning sectors



grow enterprise clients



seek new partnerships

build on our strong foundation



core values



best people



strong concepts



excellent execution



superior brands

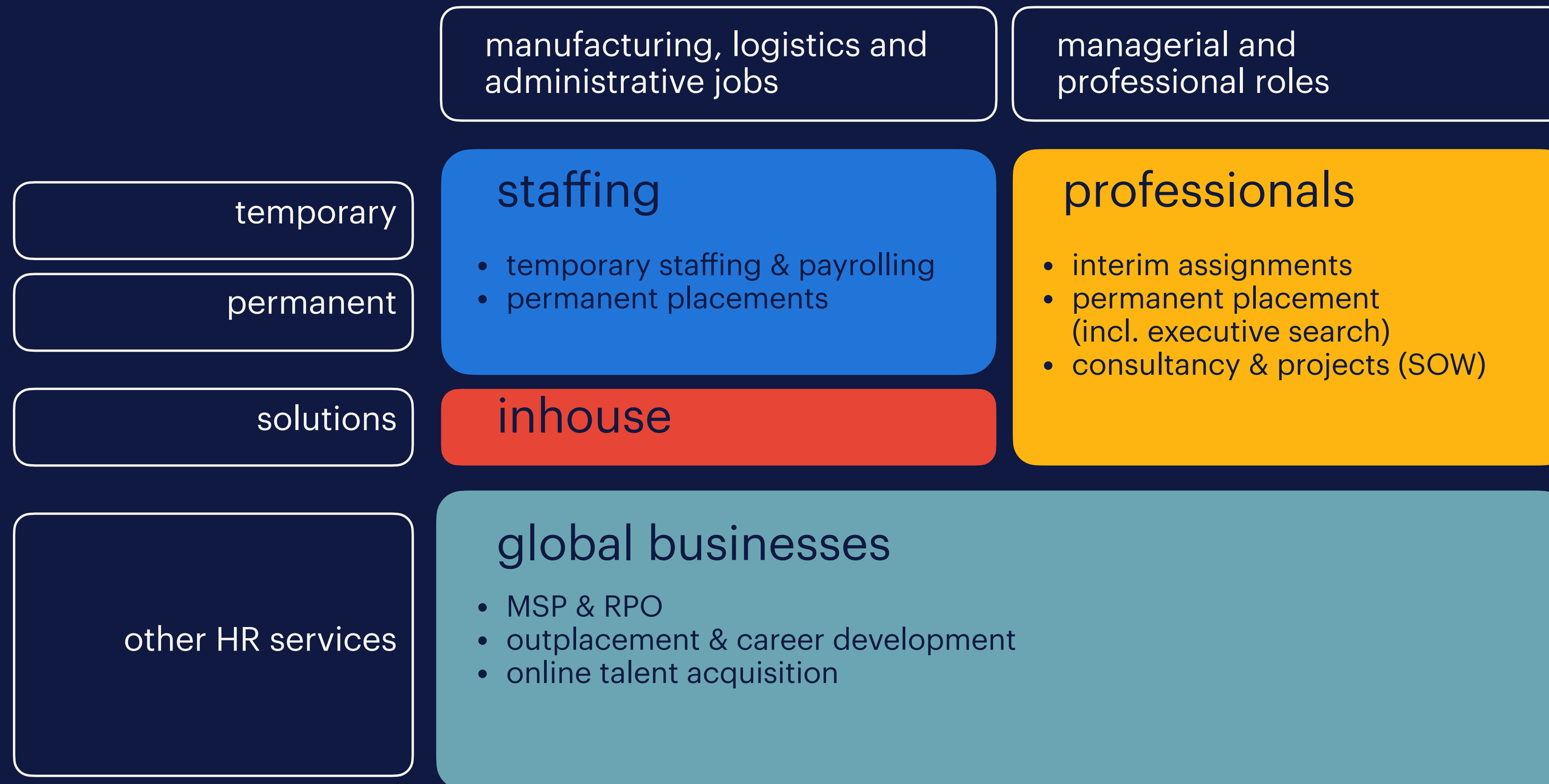


human forward promises



capital markets
day 2021.

randstad supports its clients and talent at all levels with a wide variety of services.



significant room for growth
long-term attractive market opportunities.

	global staffing market*	global professionals market*
market size (2020)	€ 213 billion	€ 142 billion
CAGR (2009-2019)	5%	13%
estimated global market share	7%	3%



*source: SIA estimates. Professionals excluding SOW

capital markets
day 2021.

well positioned to leverage structural trends
gig economy: new market emerging.

gig economy a major
opportunity:
'Gig staffing' market
estimated at
€ 61 billion in 2020*

*EMEA



create the most powerful talent engine in the world
connect with talent and clients faster, on a larger scale
and more personally than ever.

strong player in the
growing job board
space

talent engine and
tech enabler for
Randstad

capabilities &
technology
for new markets
and services

MONSTER

differentiate
through

tech and
touch.

strong concepts that span geographies and sectors
so that we can provide the right solutions for today's needs.

more tech

more touch



self-service
platforms

MSP*

Gig

very large
scale
inhouse

RPO*

inhouse

SOW*

branch based
professionals
staffing

branch
based
staffing

*MSP: Managed Service Provider
RPO: Recruitment Process Outsourcing
SOW: Statement of Work



capital markets
day 2021.

supporting winning sectors: agility for unprecedented demand for both clients and talent, speed is of the essence.

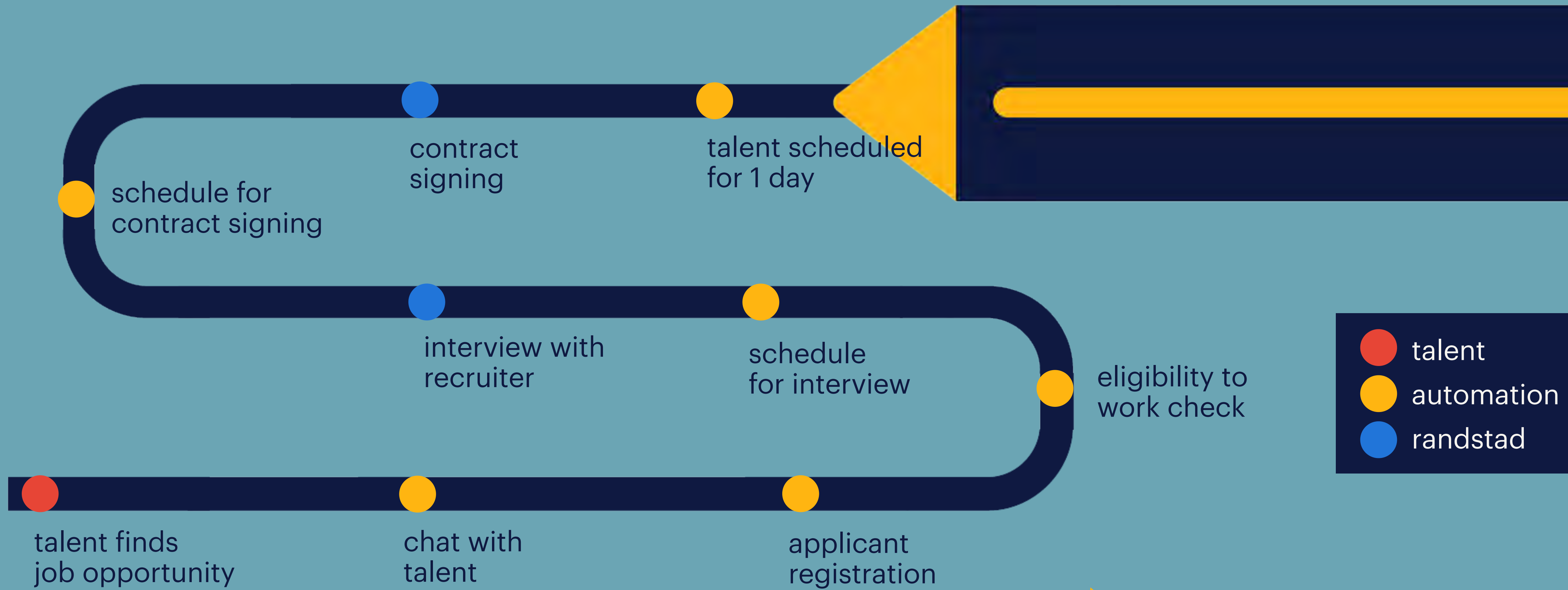
client's challenges

- need for a large amount of hiring
- tight labor markets
- logistical challenge

talent's challenges

- multiple job offers
- simple process
- fair package

Randstad has introduced technology, further building on our Inhouse concept, to meet these needs, with a touch approach at its core



capturing data throughout the funnel & automated reporting lead to full transparency for the client

capital markets
day 2021.



randstad is well positioned for further growth and creating sustainable value. unrivalled breadth & scale and combining Tech and Touch to provide a differentiated offer.

outperforming
today

strong concepts

excellence in execution

winning in enterprise

enable us to delight our
talent, clients and
employees

further digitization of our
processes to build the
foundation and scale

data-driven insights

operational flexibility and agility

#1 HR services provider
in the world, spanning
the entire employment lifecycle

through portfolio
management

unrivalled breadth &
scale

combine Tech and Touch
to make our offer unique

value

creation.



value creation.

- market leading growth
- best performance today and tomorrow
- financial objectives re-confirmed
- transparent capital allocation policy

A portrait of Henry Schirmer, CFO of Randstad. He is a middle-aged man with a balding head, wearing a dark blue suit jacket, a light blue shirt, and a blue patterned tie. He is smiling slightly and looking towards the camera. The background is a blurred office interior with blue lighting.

Henry Schirmer
Randstad, CFO



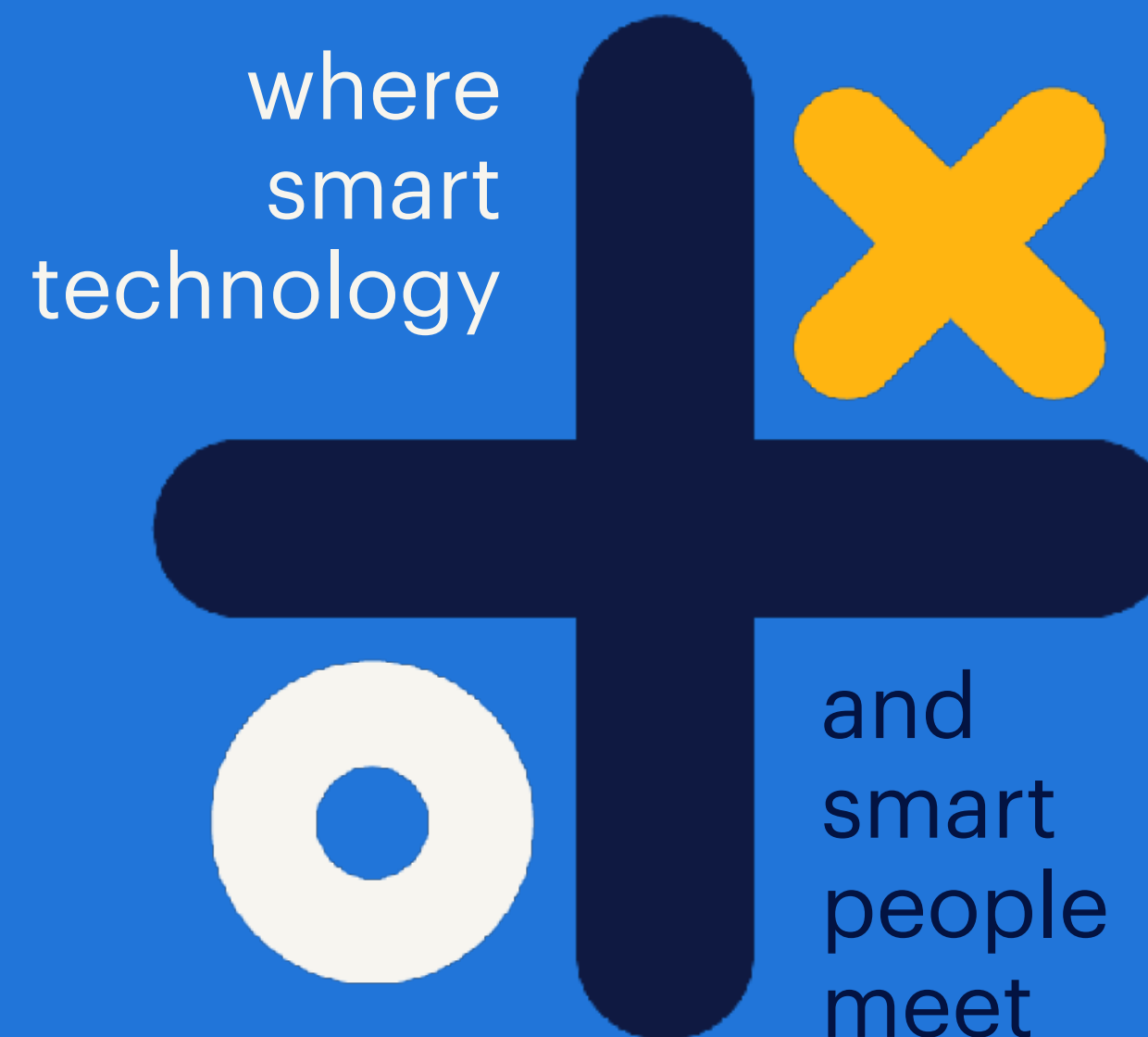
value creation today and tomorrow.

market-leading growth

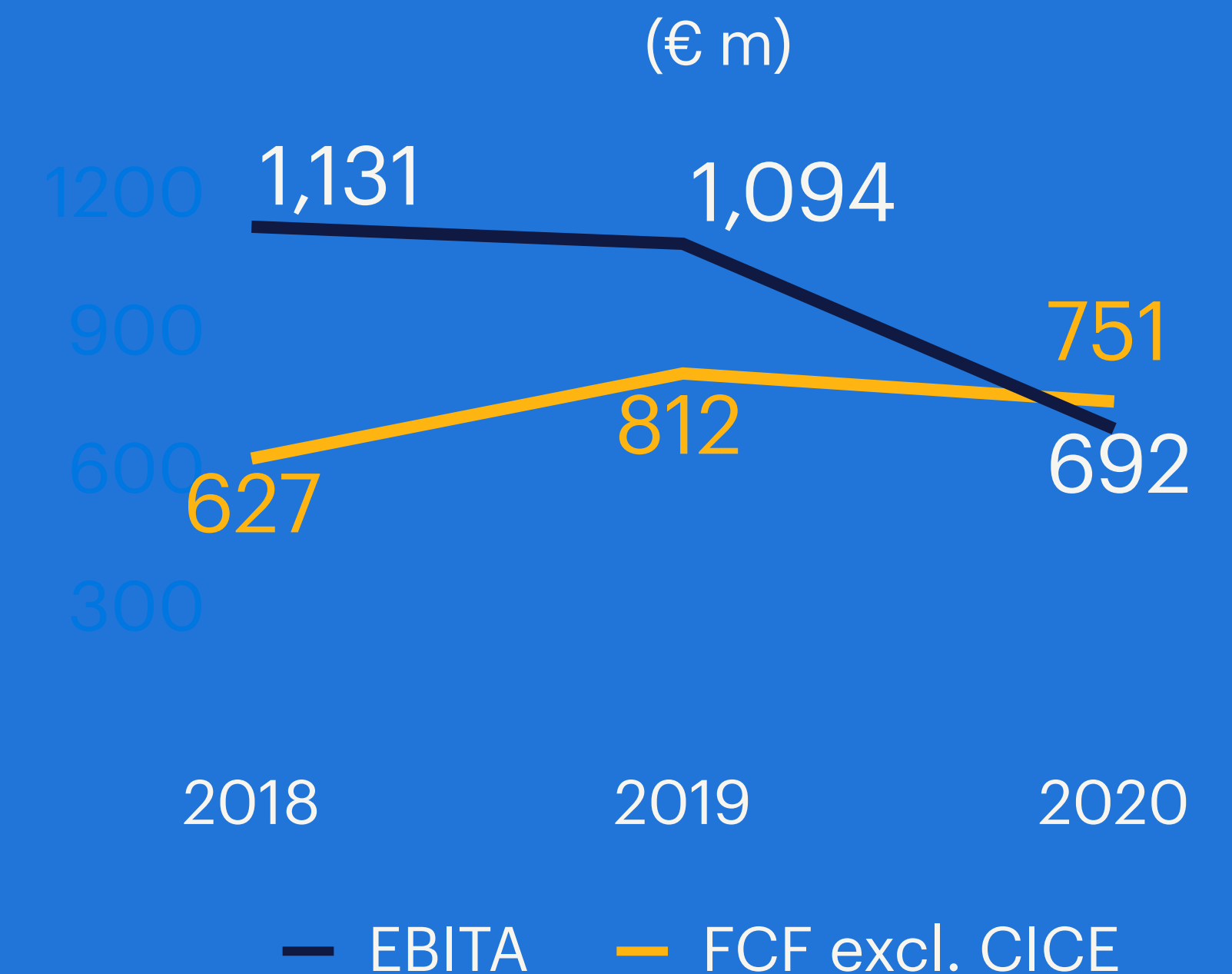


*organic growth per working day

transforming with speed & impact

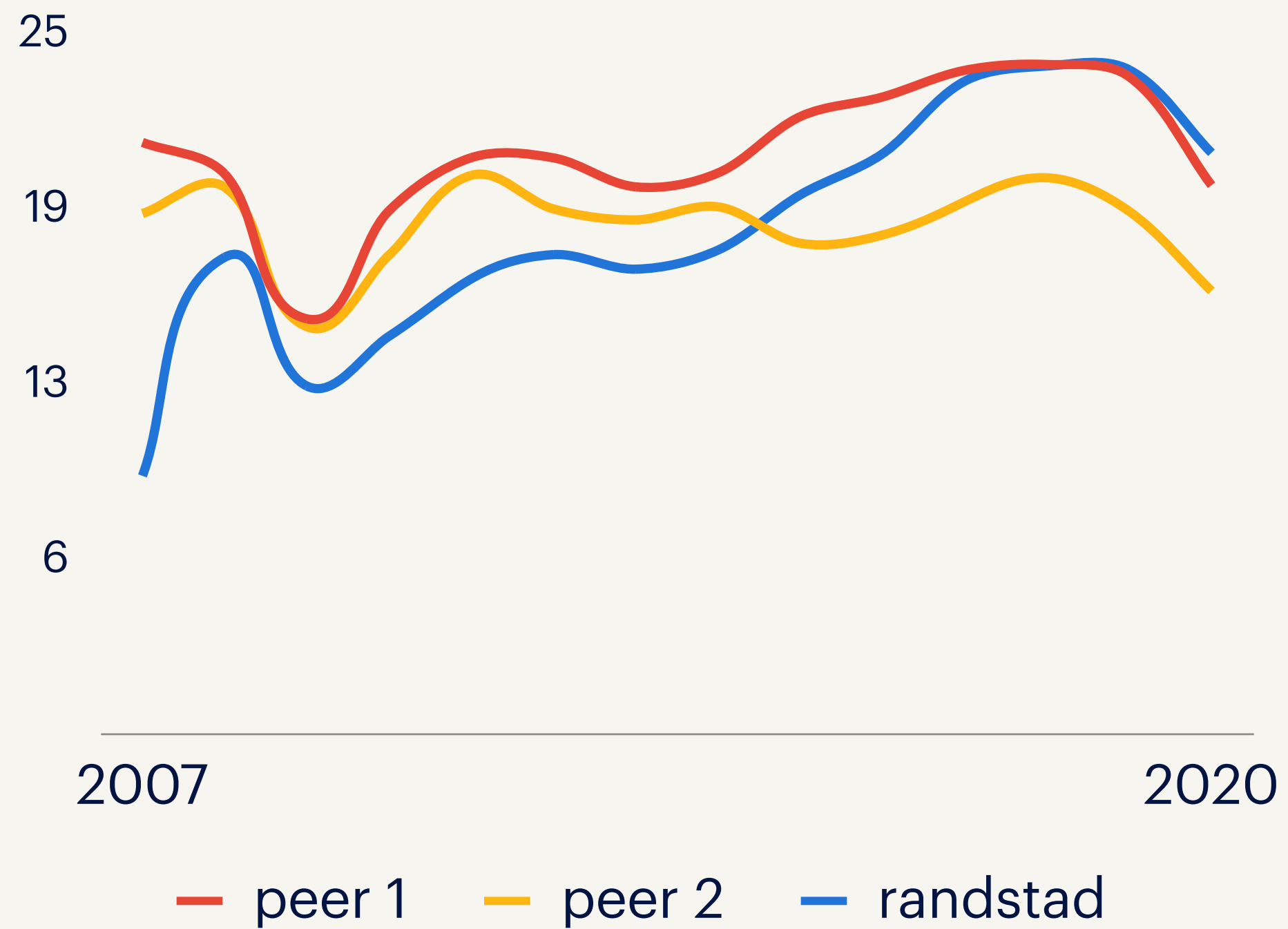


counter cyclical nature of cash flows

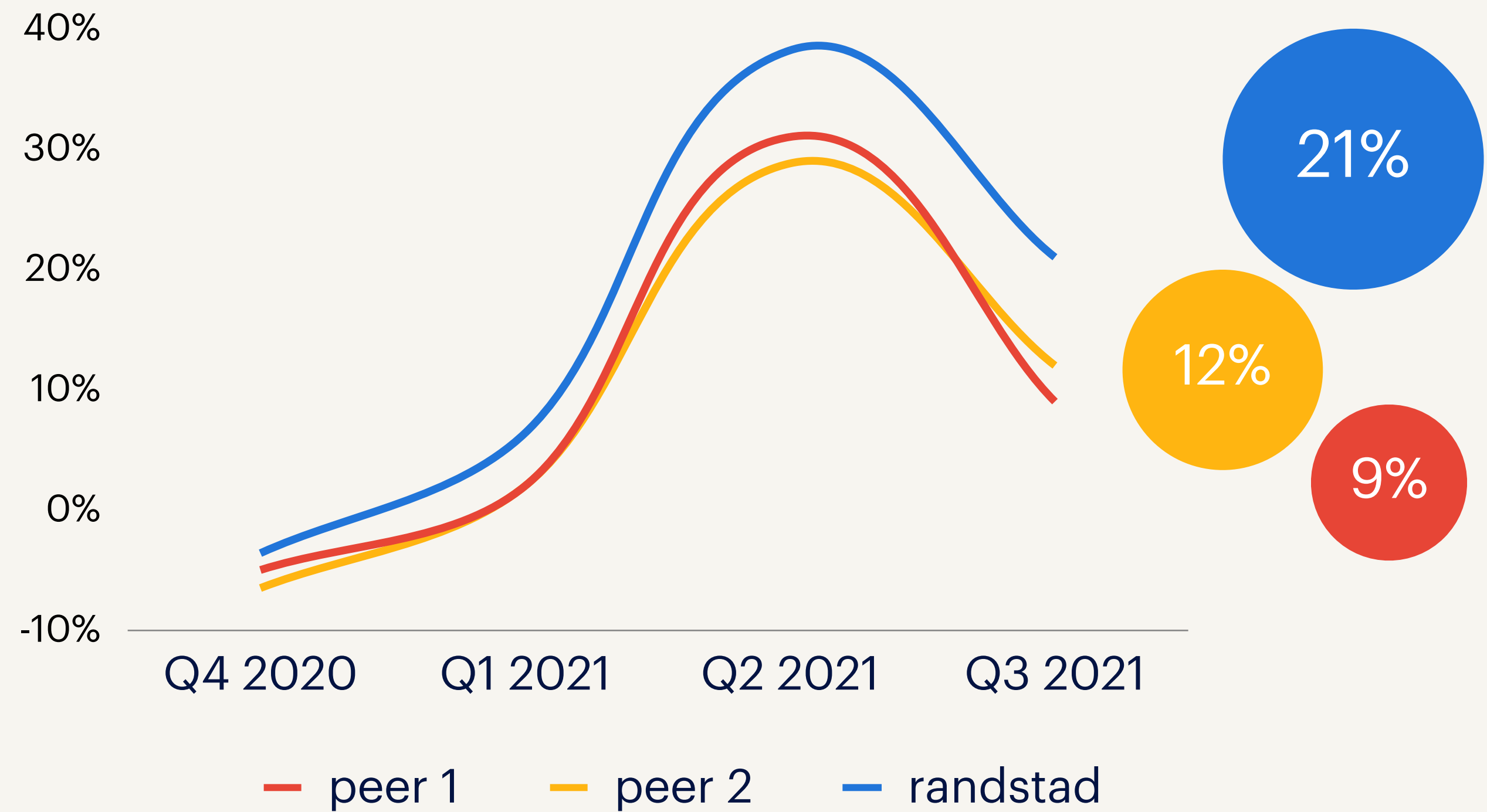


best in class topline performance.

revenue in € bn



quarterly organic revenue growth YoY



future fit investments supported by productivity.

incremental
investments into
digital capabilities



productivity gains to fund
transformational
investments



sustained market outperformance, differentiated winning concepts.

inhouse

growing



- inhouse growth above group average ('09 -'19 CAGR 15%)
- new locations
- new markets

resilient



- high client retention
- highest resiliency through covid-19
- cost savings program in 50% of clients

opportunity

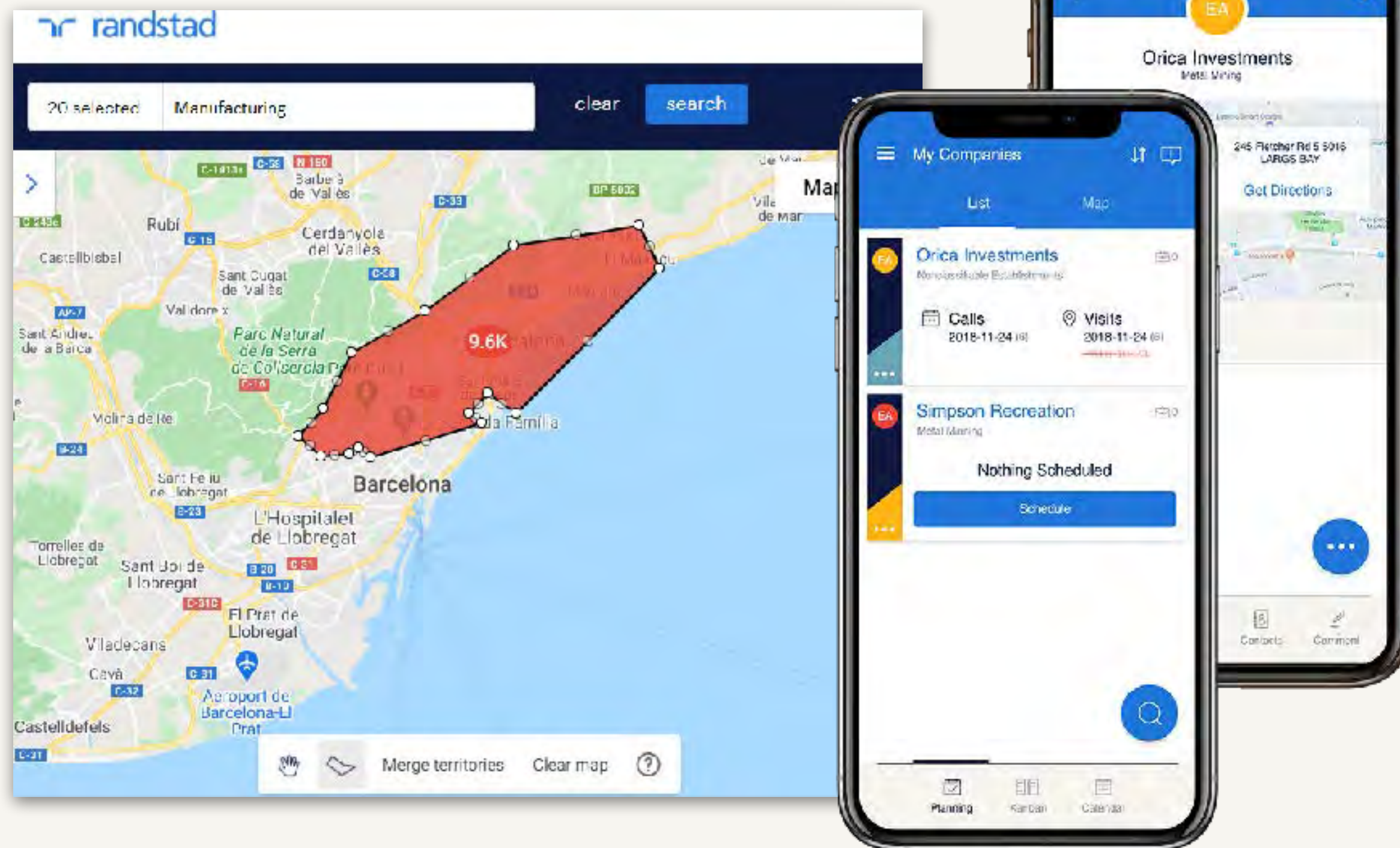


- geographical expansion
- very large inhouse
- cross-selling

the right to win, powered by data.

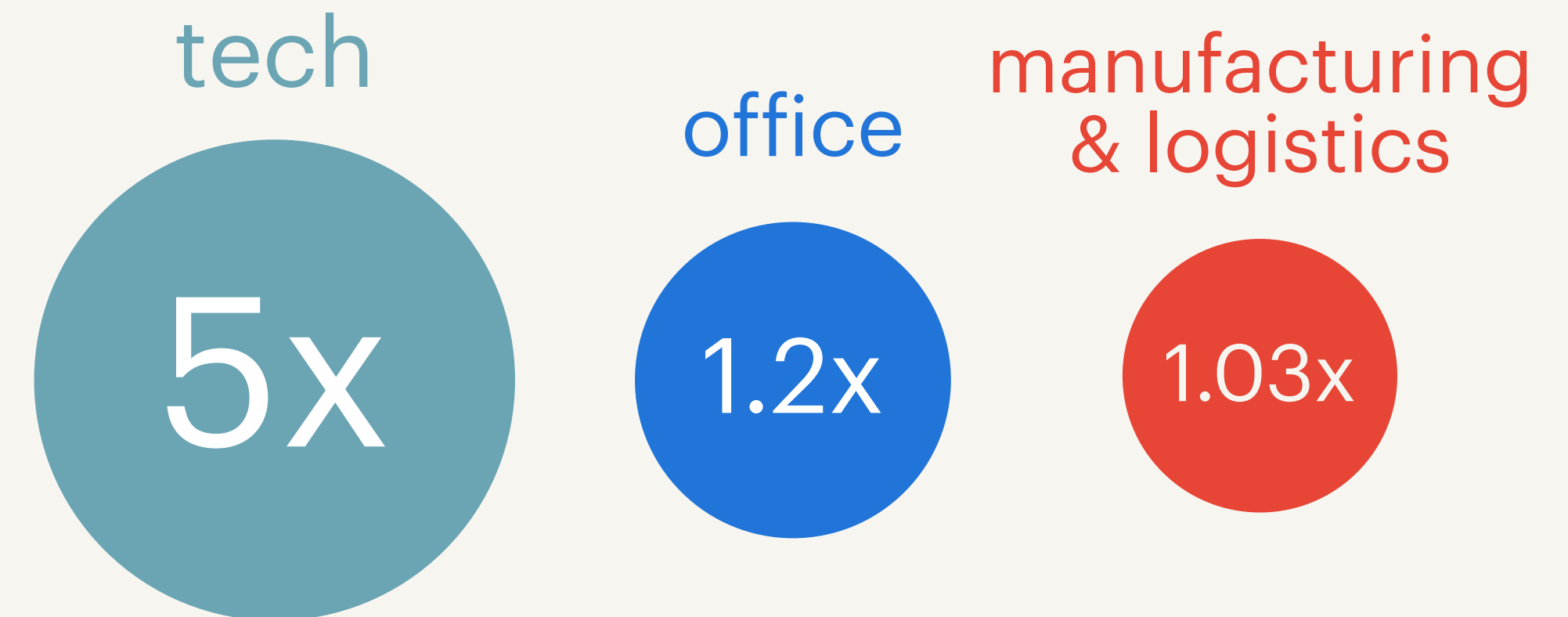
data driven sales

list of prospects prioritised for consultants in a defined territory



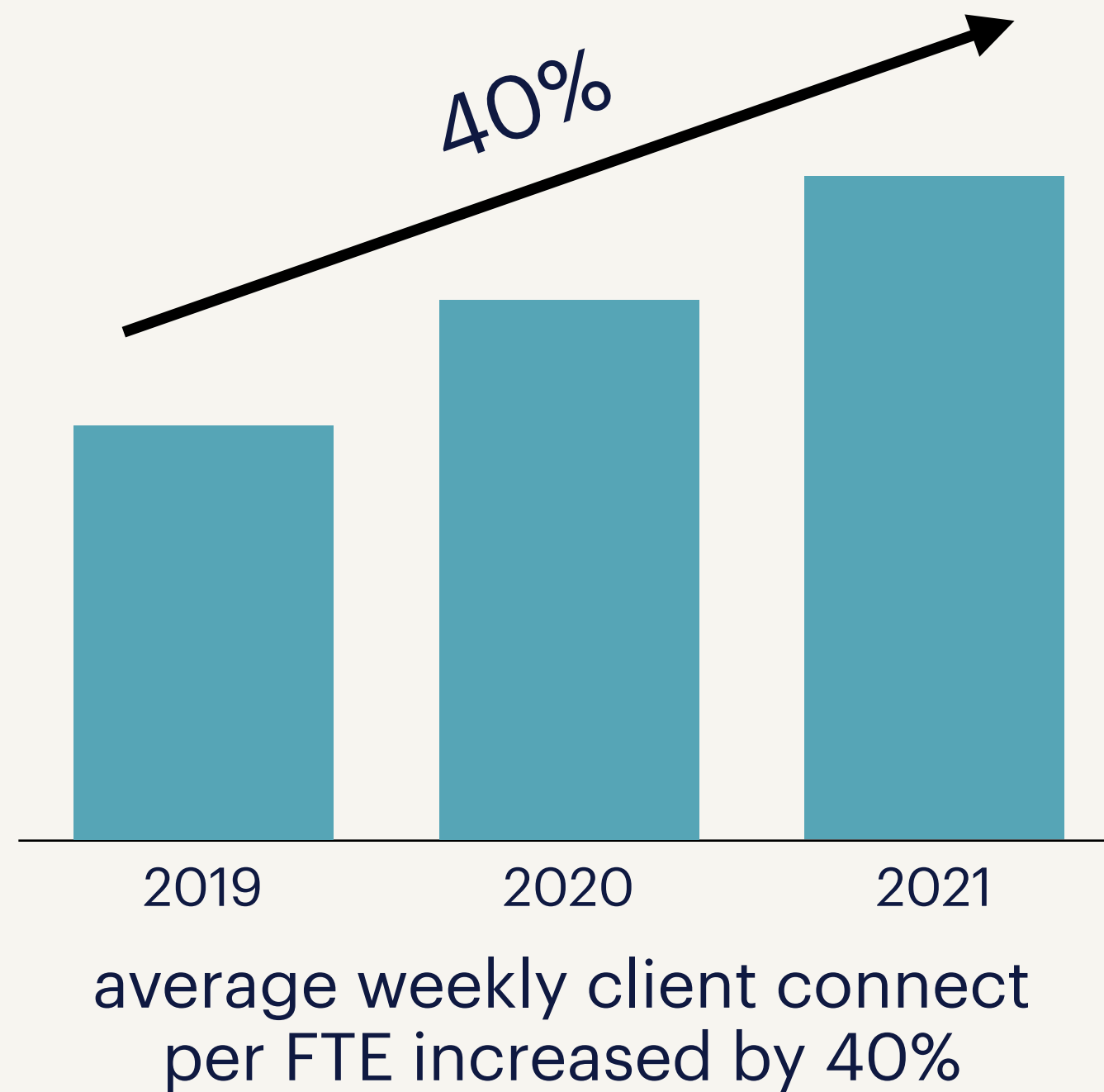
valuable insights into talent pools

US median job radius increase in miles from Q1 2019 to Q3 2021



field steering 2.0.

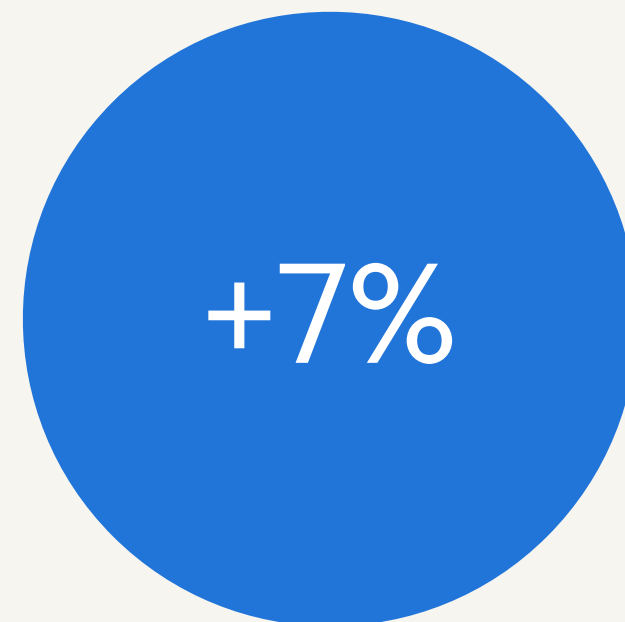
commercial intensity



creating capacity for profitable growth

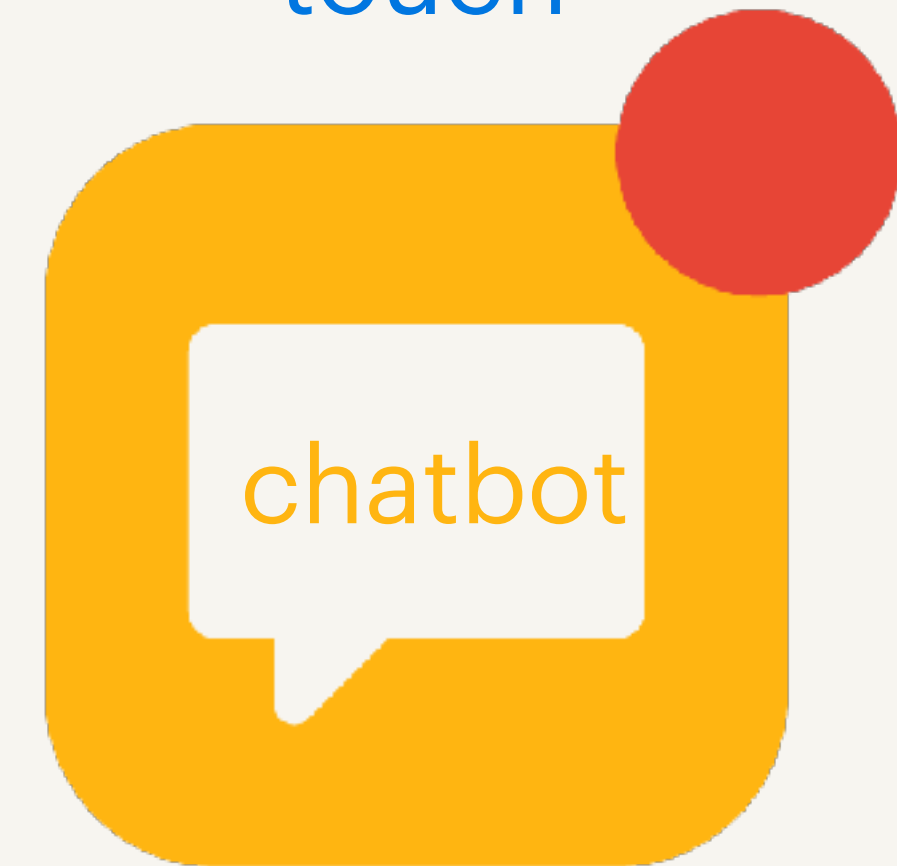
> 75% of additional FTEs in geos with EBITA above group average

FTE growth*



*Q3 2021 vs Q3 2019

tech empowering touch



- developed a pre-screening and scheduling chatbot
- over 200,000 placements in the US
- customer satisfaction +17%

building towards structurally improved profitability.

field productivity



at Q3 2021

#newways - cost connect

- IT
- indirect procurement
- T&E
- accomodation
- fleet
- marketing
- insurance & benefits

60+

business leaders

19

immediate actions

24

future-proofing initiatives

27

initiatives implemented

credit risk analytics through Covid period

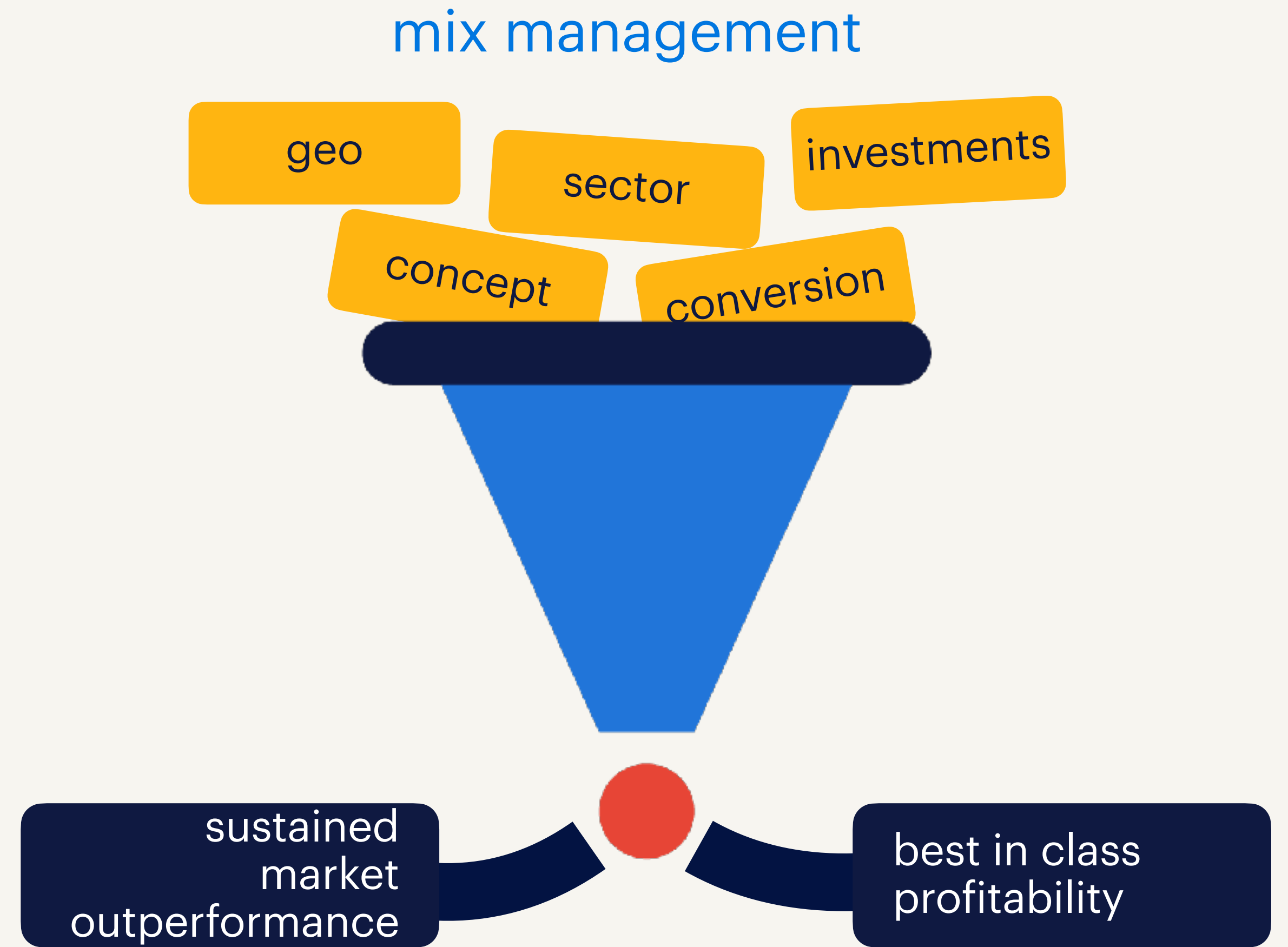
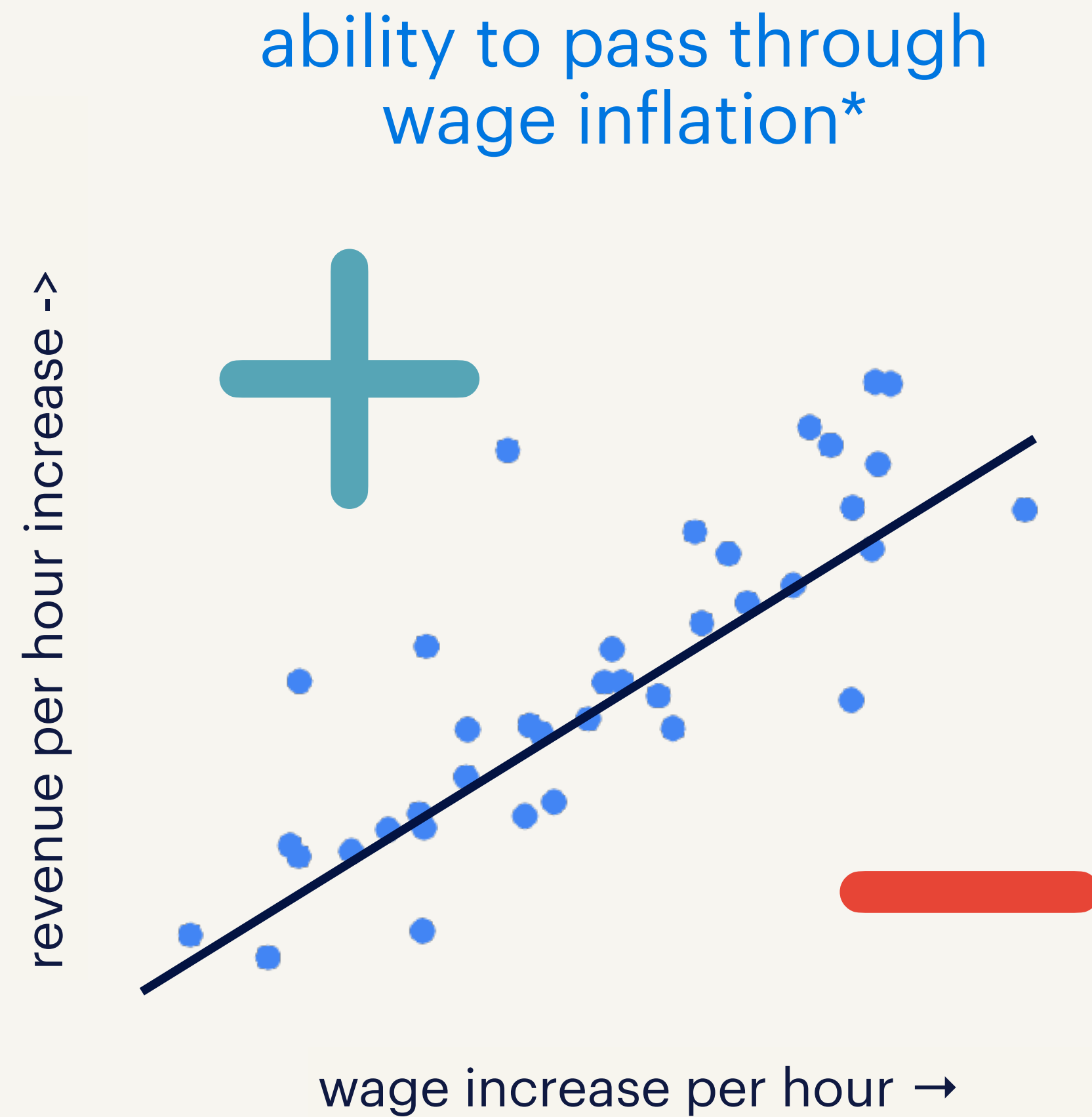
overdues



~€ 200 m less overdues

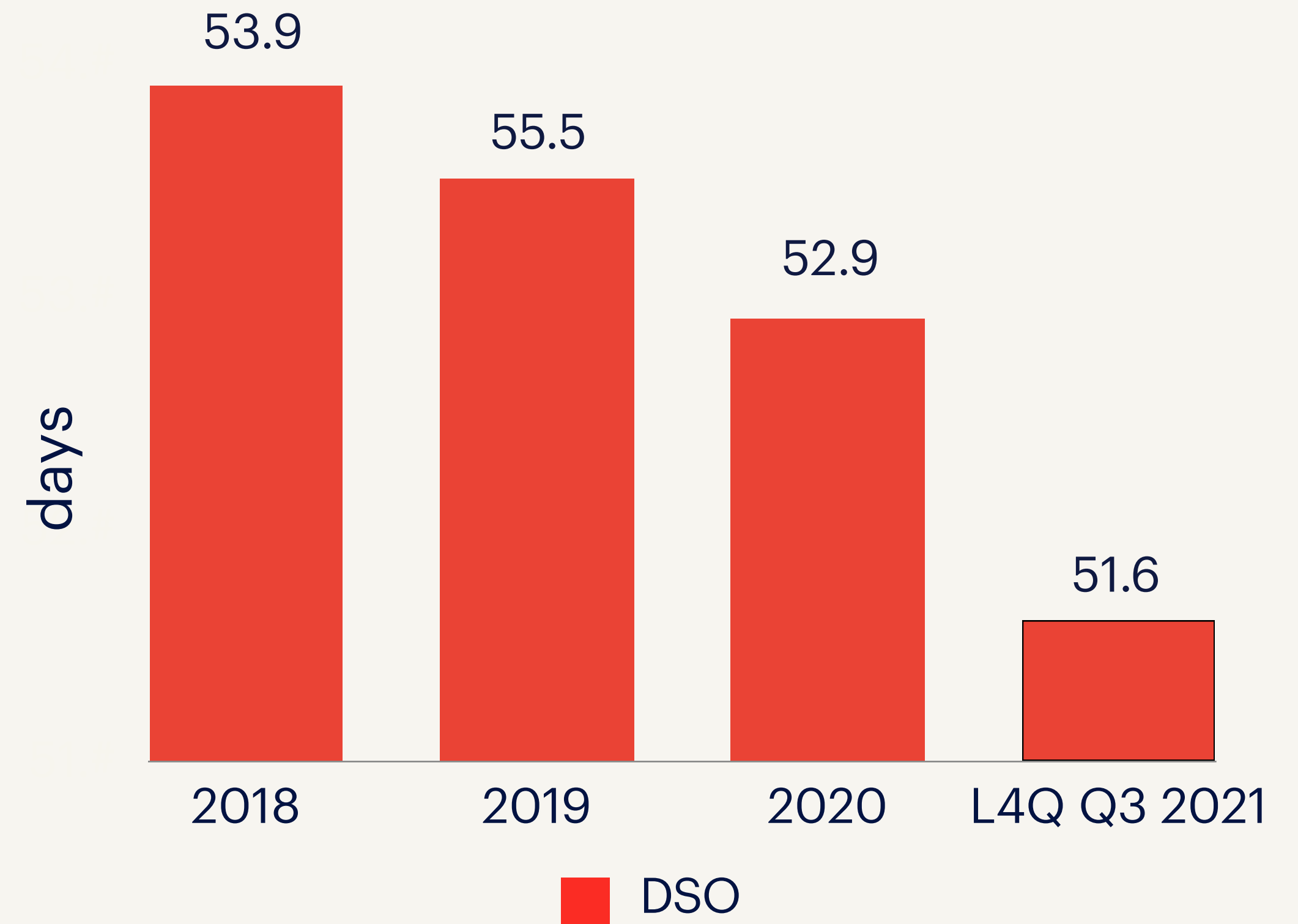
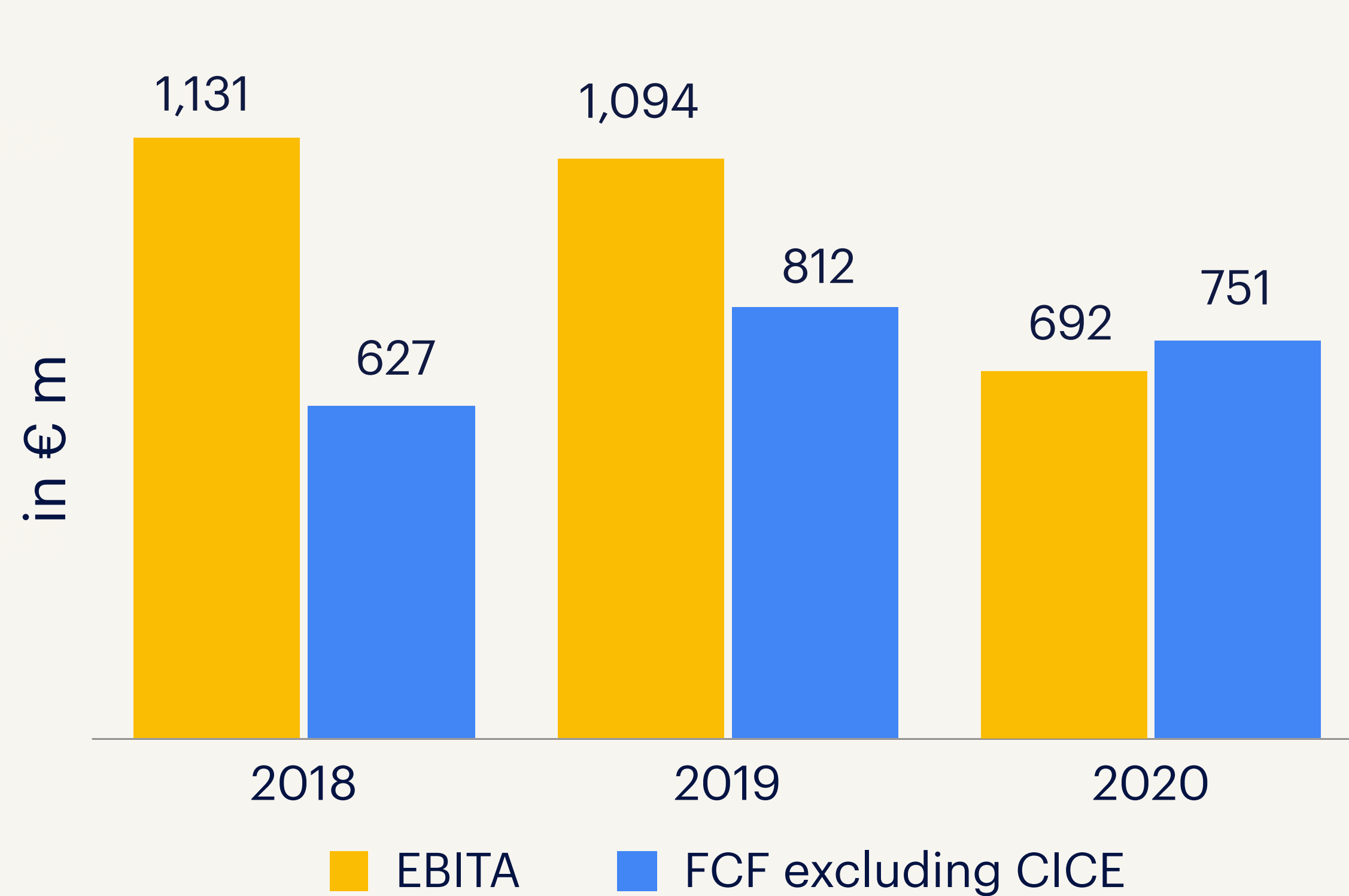
*overdues as % of accounts receivable from Dec. 2019 to Dec. 2020

utilizing powerful insight engines to win with clients and talent.

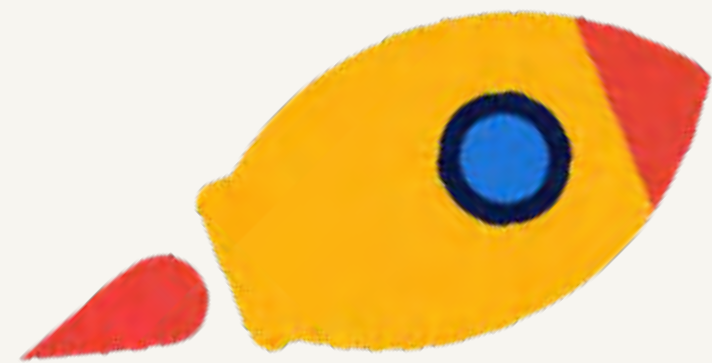


*Q3 2019 to Q3 2021, for 40 occupation/country combinations

sound and resilient cash flow conversion.



creating sustainable long-term value for all our stakeholders long-term financial objectives re-confirmed.



clear growth leader, drive continuous and profitable market share gains



focused on organic growth, complemented by selective bolt-on M&A activity



EBITA margin of 5% to 6% over time

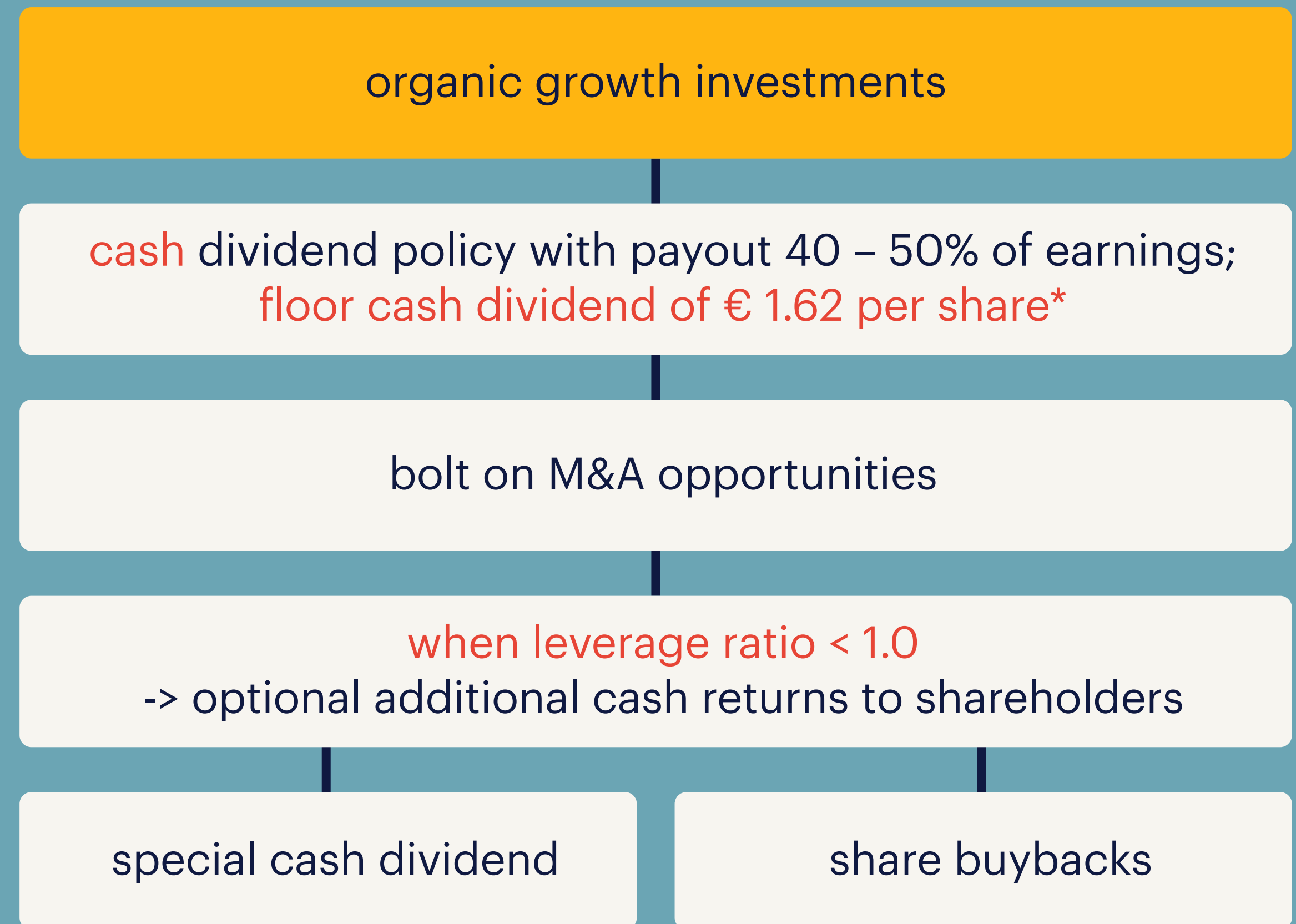


strong focus on ROIC, optimize Economic Value Added (EVA)



maintain a sound financial position

transparent capital allocation policy.



* barring (i) seriously adverse economic conditions, (ii) material strategic changes to the sector, and (iii) a material deterioration in our solvency and liquidity ratios.

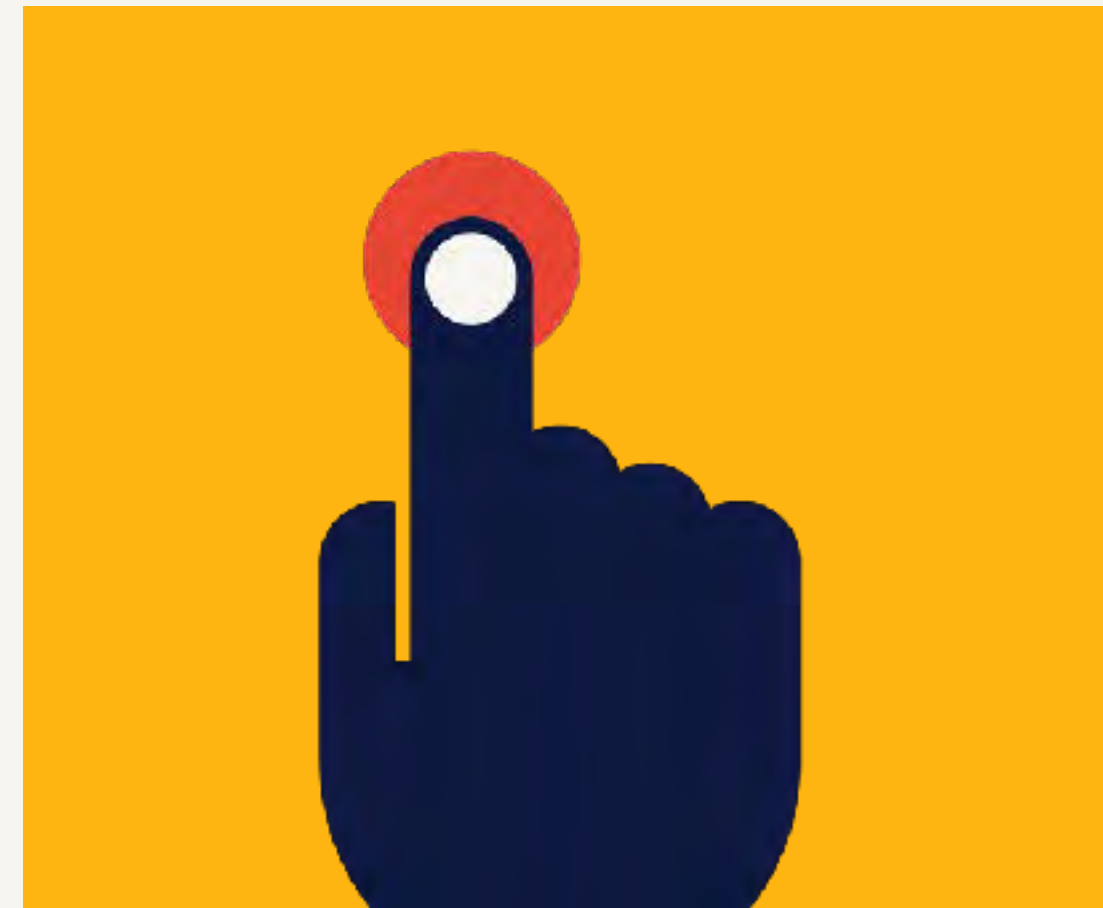
capital allocation principle.

invest into
market-leading
growth

invest into
winning, digital
capabilities

selectively invest
into M&A

attractive
dividend



- accelerating portfolio strategy
- strengthening market position
- EVA accretive <3 years



maintain discipline | EVA principles leading | balancing long-term & short-term

digitizing

& IT.



digitizing & IT.

- enable our strategy
- digitize all our processes
- balance tech & touch

A portrait of René Steenvoorden, a middle-aged man with short brown hair, wearing a dark blue pinstriped suit jacket over a light blue shirt. He is looking slightly to the left of the camera with a subtle smile. The background is a blurred office setting with windows.

René Steenvoorden
Randstad, Chief Digital Officer

a differentiated strategy becoming the world's most valued 'work life partner'.

touch the work lives of 500 million people worldwide by 2030



support as many people as possible in realizing their true potential throughout their working life

further differentiate through tech and touch



leverage global collaboration



unlock the power of our data



prioritize talent experience

create value through our portfolio



expand presence in concepts and geographies



lead in winning sectors



grow enterprise clients



seek new partnerships

build on our strong foundation



core values



best people



strong concepts



excellent execution



superior brands



human forward promises

we digitize and harmonize all our processes
and implement them across our 38 countries.

unlock future
value

improve existing
processes

build a solid
foundation



solid

digital foundations.



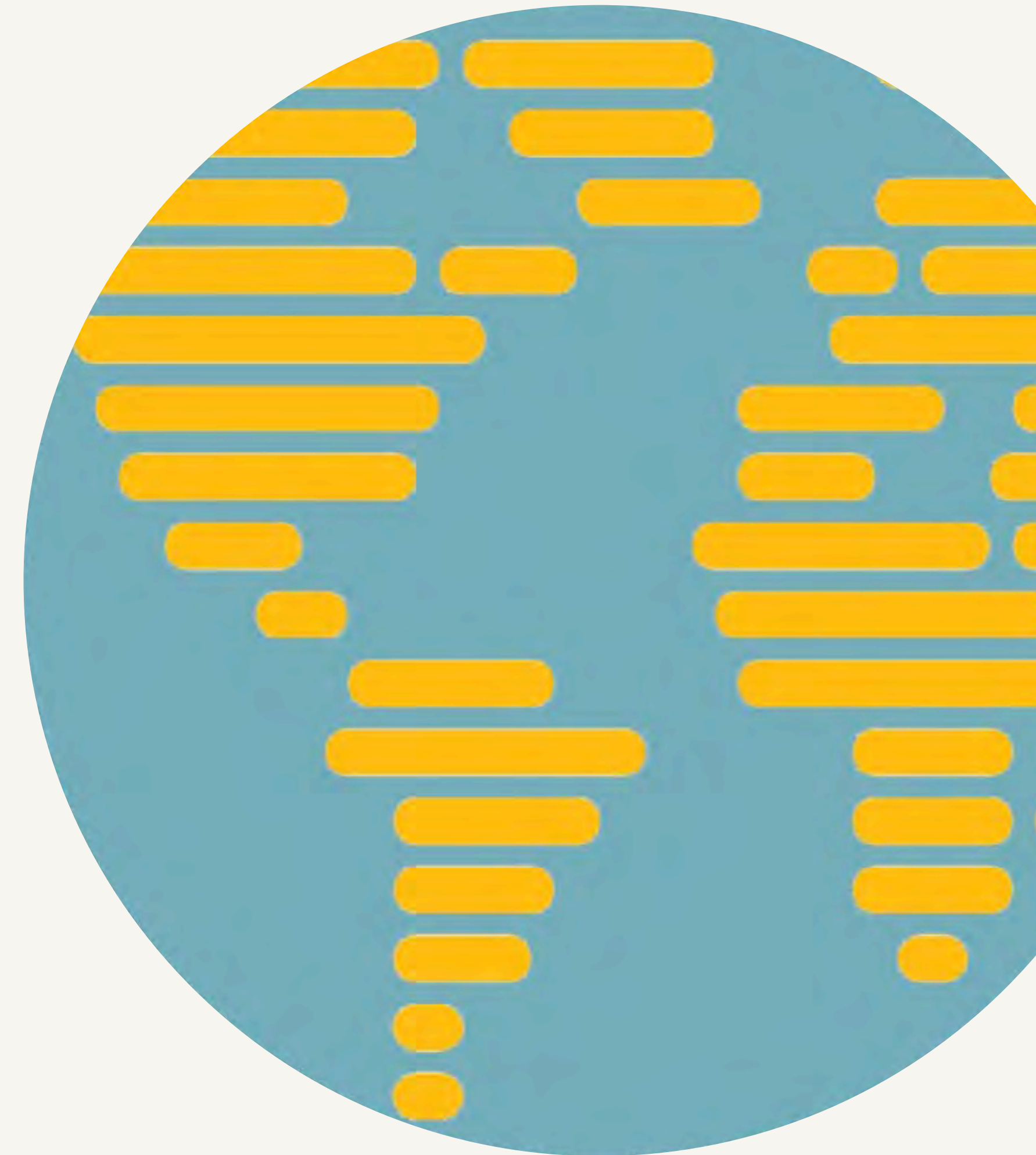
we started with the design of a digital architecture.

digital solutions

data management

global IT services

digital architecture



we strongly believe in a microservices architecture
parsing example.



the global IT services are enabled via cloud.

digital solutions

data management

global IT services

digital architecture

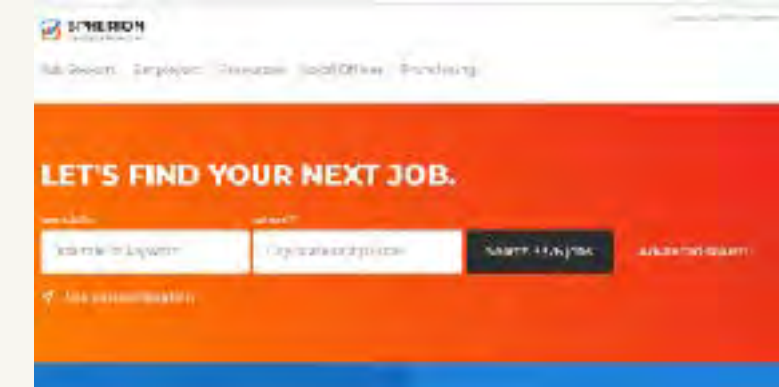


data helps us steer our activities and build relationships.



more talent connecting through online channels.

160
million

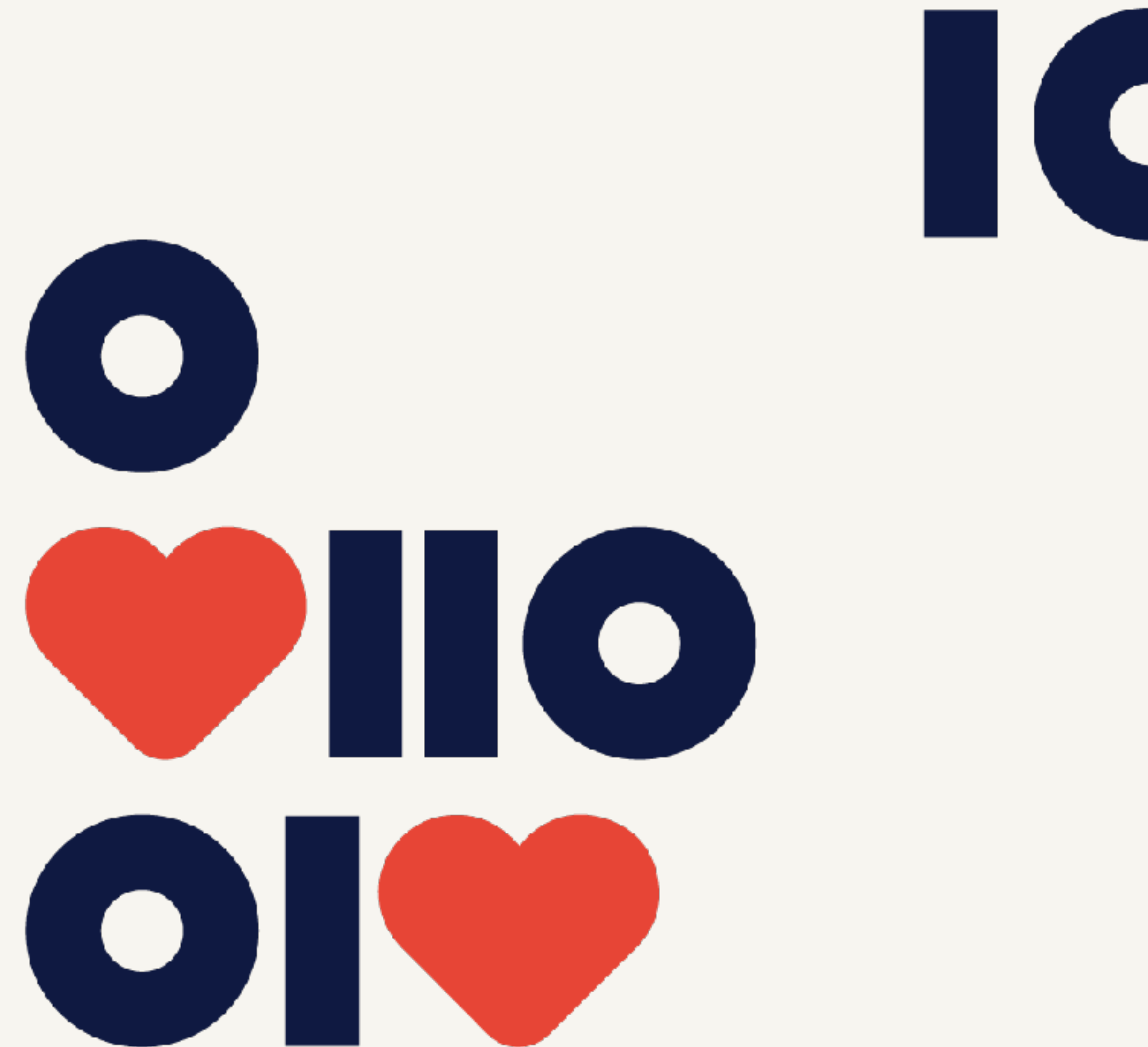


data is a key differentiator in the randstad strategy.

better
understanding
needs and
ambitions talent
and clients
short & long-term

constant view
of the world
of work at large

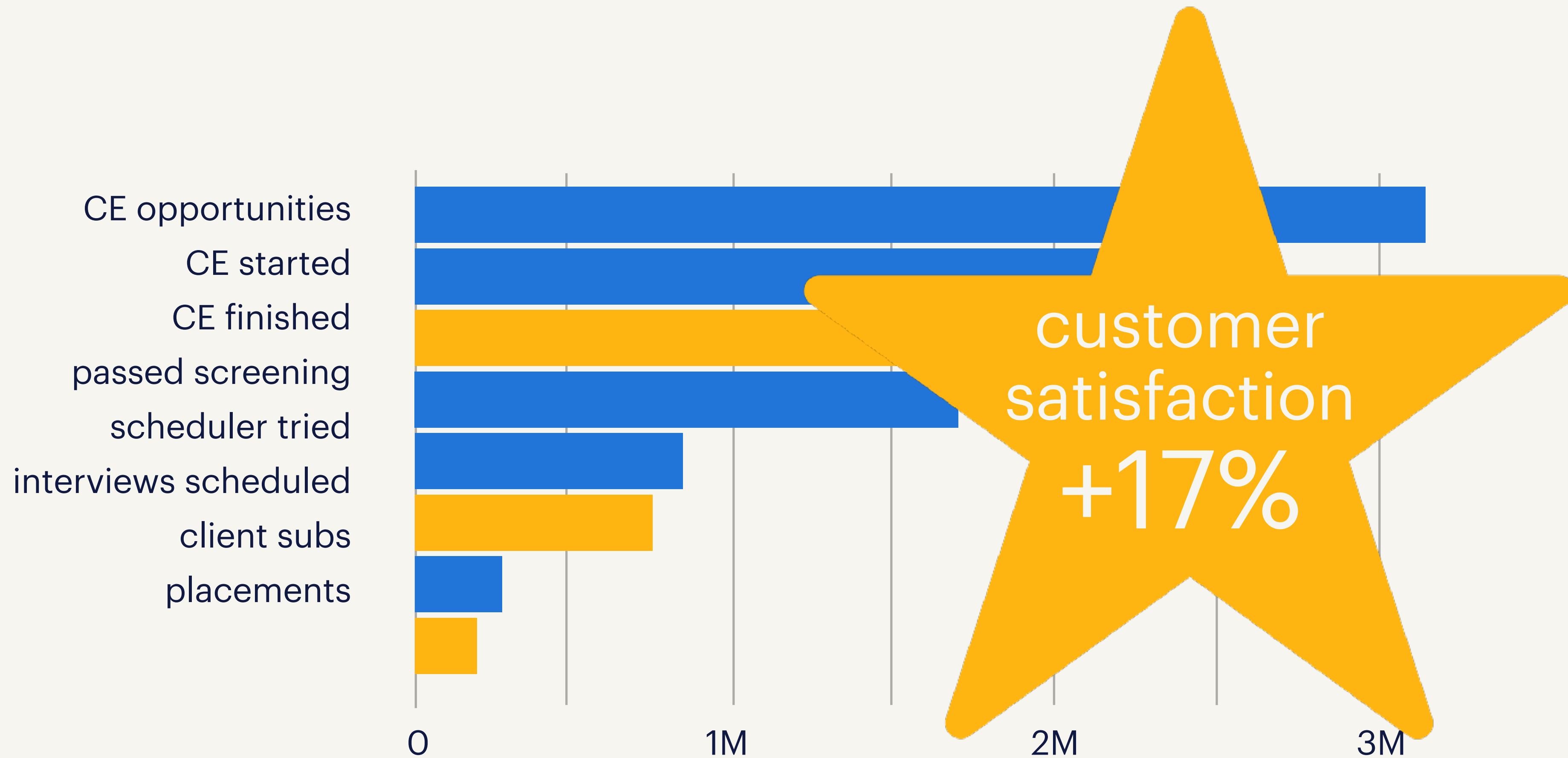
today 21 of our 38 countries are
connected to our global data ocean



improve

existing
processes.

we developed a pre-screening and scheduling chatbot that resulted in over 200,000 placements in the US.



*CE stands for conversation engine

chatbot
rated 4.5
out of 5



we provide colleagues and clients with a platform to manage the pool of available talent and fulfill planning requirements.

live in
23 countries

6,000
active clients

>500,000
shifts planned p/w

The screenshot displays a scheduling software interface. At the top, there is a navigation bar with tabs for HOME, SCHEDULE, PEOPLE, REPORTS, PAYROLL, and SETTINGS. Below the navigation bar, the interface shows a dropdown menu for 'Mobile demo xyz', a 'Week' view selector, and a date range of '15 | 6 Apr - 12 Apr'. The main content area is divided into three columns representing the days: 'Mon. 6 Apr', 'Tue. 7 Apr', and 'Wed. 8 Apr'. Each day column shows the number of shifts planned: 5 shifts for Monday, 5 shifts for Tuesday, and 3 shifts for Wednesday. Below this, a list of employees is shown with their names and icons. The employees listed are Astrid Hoppenbrouwer, Betty Boop, Bugs Bunny, and Esteban Mino. Their schedules are displayed in a grid format, with red blocks indicating shifts. For example, Astrid Hoppenbrouwer has shifts from 09:00 to 12:00 on both Monday and Tuesday. Bugs Bunny has a shift from 09:00 to 12:00 on Monday and Tuesday. The interface also includes a 'Manage Employees' button and a 'Sort by' dropdown menu.

	Mon. 6 Apr	Tue. 7 Apr	Wed. 8 Apr
Employees	5 Shifts	5 Shifts	3 Shifts
Astrid Hoppenbrouwer	Packing Squad A 09:00 - 12:00	Packing Squad A 09:00 - 12:00	
Betty Boop			
Bugs Bunny	Packing Squad A 09:00 - 12:00	Packing Squad A 09:00 - 12:00	
Esteban Mino			



randstad
relevante.

the talent technology suite from Randstad



capital markets
day 2021.

unlock

future value.



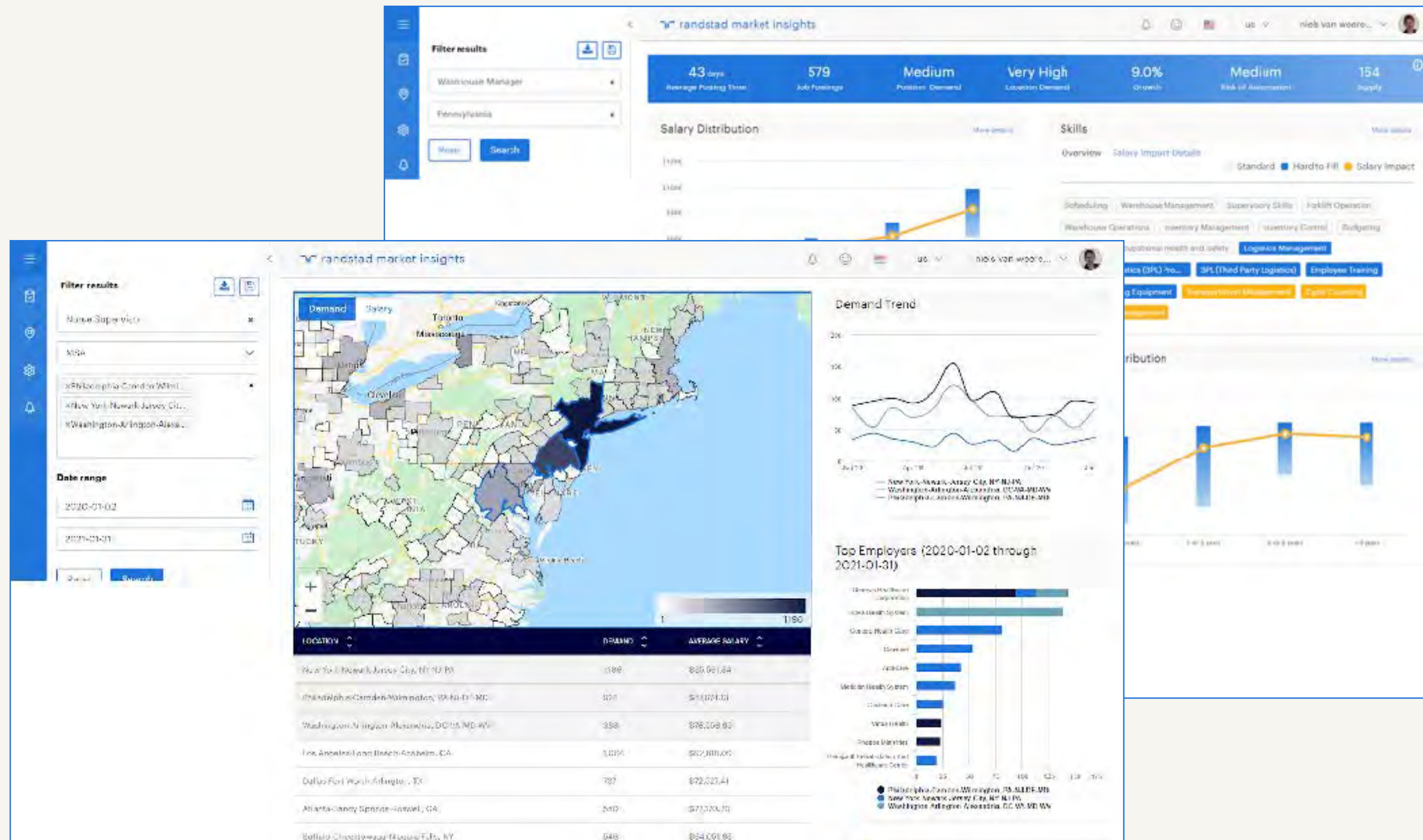
RIF at the forefront of future of work on top of major innovations impacting our industry.



Randstad Innovation Fund at a glance

- 22 portfolio investments
- +25 follow-on, 10 exits
- +350 deals reviewed per year
- >3,200 HR Tech startups in our funnel
- majority of investments leveraged in our concepts

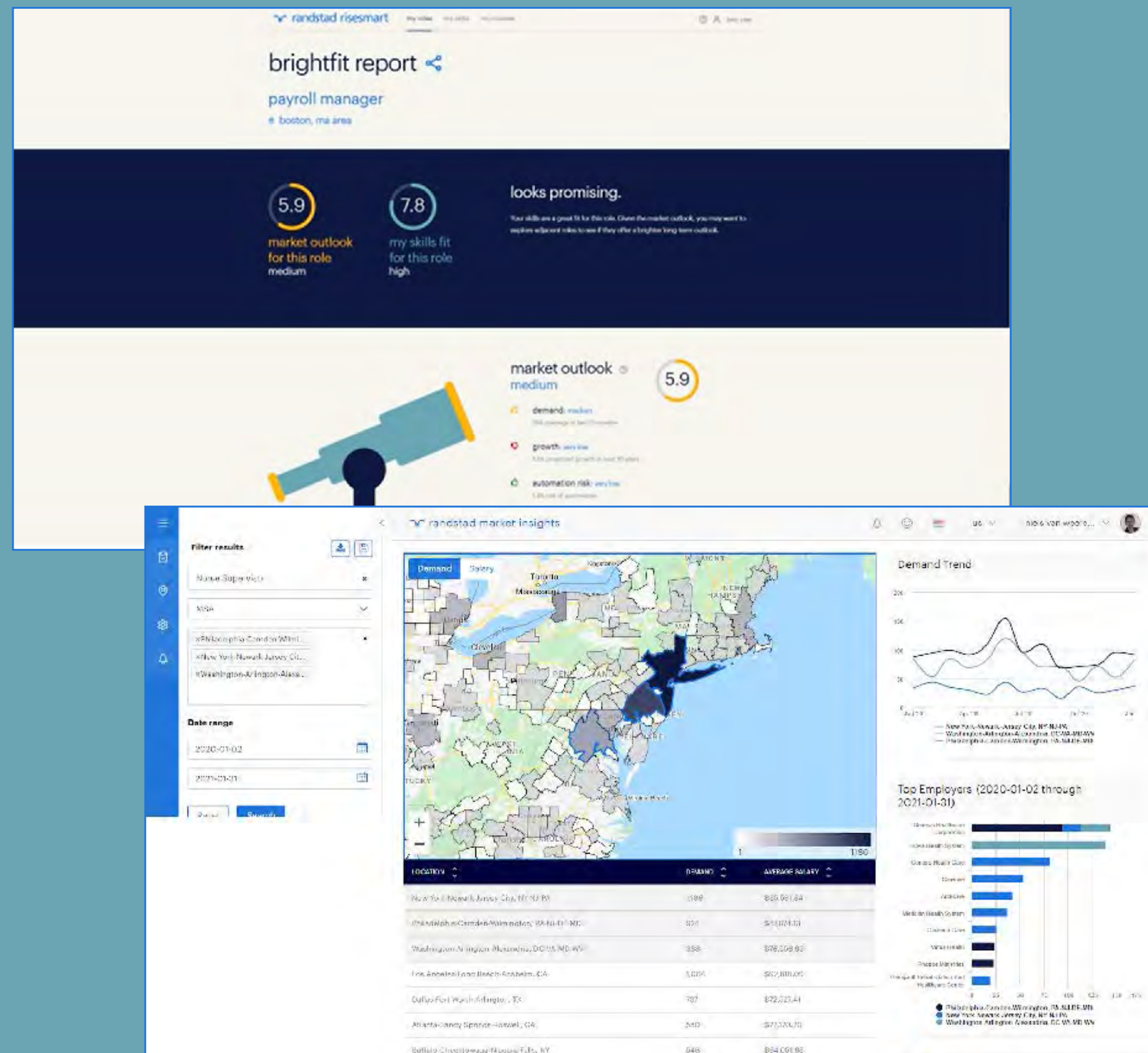
aligned data collection helps us to quickly spot trends that help clients to be more successful.



we help talent make better, actionable career decisions by guiding them to jobs with a bright market outlook.

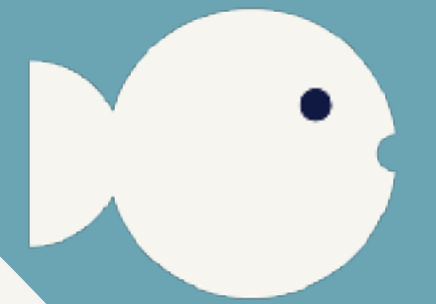


digital solutions can use the same market data



randstad
digital solutions

labor market data lake



API's

security

machine learning

skills extraction

data validation

job taxonomy

data integration

data governance

data cleansing

data procurement

data enrichment

data storage

data translations

cloud platform

external data

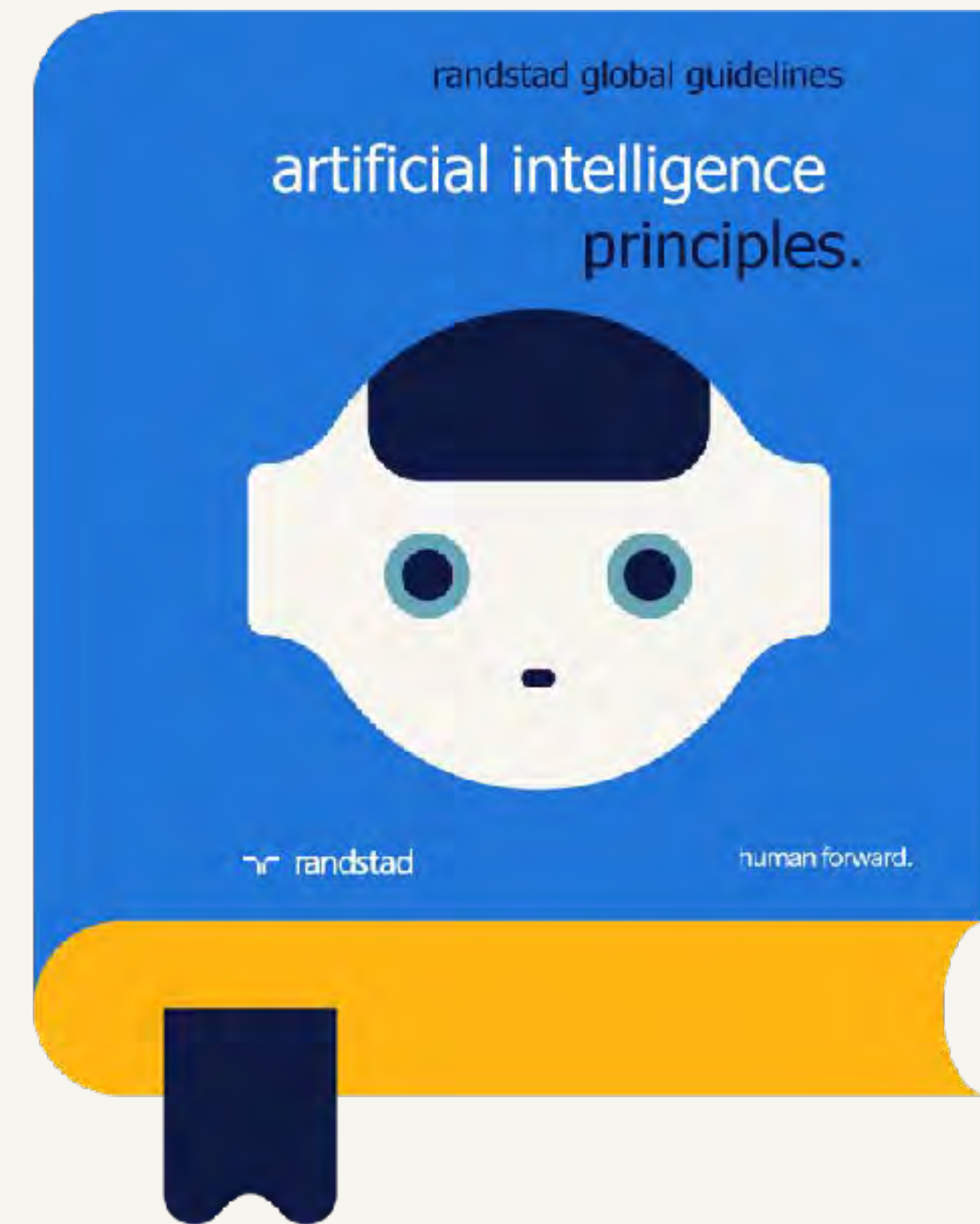
randstad data



capital markets
day 2021.

we invest in our ability to use AI and ethics to rule out unconscious bias and ensure diversity, equity and inclusion in the workplace.

- human forward
- human oversight
- transparency & explainability
- fairness & inclusivity by design
- privacy and security
- accountability





integrated way of working



is key for success.

see our tech in action
take a look at our selected demonstrations after the Q&A session.



randstad
market insights



gig economy:
employee
compliance



AI conversation
engine

global

businesses.

global businesses.

- Monster: global talent engine
- Randstad Enterprise Group
 - strategic rationale proof points
 - client case studies

A professional portrait of Rebecca Henderson, a woman with dark, wavy hair, wearing a dark blazer and a necklace. She is smiling slightly and looking towards the camera. The background is a blurred office setting with warm lighting.

Rebecca Henderson
member of Randstad Executive Board

a differentiated strategy becoming the world's most valued 'work life partner'.

touch the work lives of 500 million people worldwide by 2030



support as many people as possible in realizing their true potential throughout their working life

further differentiate through tech and touch



leverage global collaboration



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superior brands



human forward promises

create the most powerful talent engine in the world
connect with talent and clients faster, on a larger scale
and more personally than ever.

strong player in the
growing job board
space

talent engine and
tech enabler for
Randstad

capabilities &
technology
for new markets
and services

MONSTER

MONSTER

exponentially more conversations
in the world of work.

strong player in the growing job board
space.

- \$28 bn global market, growth rate 10%+
- Monster growth in Q3 2021
- transformation complete by end of 2022
- cost structure in place to scale profitably
- KPIs gaining momentum



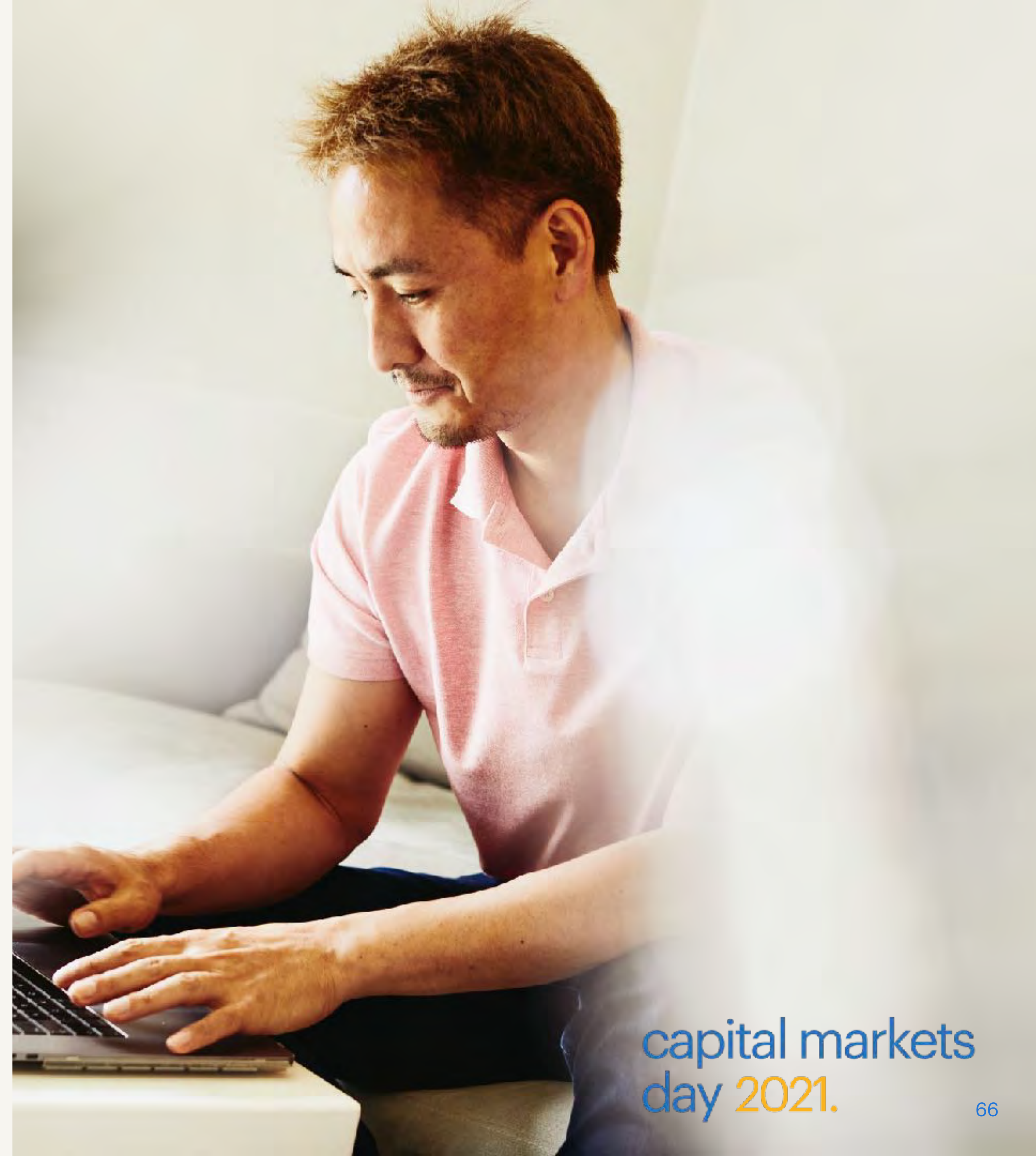
capital markets
day 2021.

MONSTER

exponentially more conversations
in the world of work.

talent engine and tech enabler for
randstad.

- driving Randstad fill rates
- sharing Randstad talent with Monster
- talent centric journeys
- data-driven architecture with ML/AI
- latest technology in the market



capital markets
day 2021.

MONSTER

exponentially more conversations
in the world of work.

capabilities & technology for new markets
and services.

- developing Randstad branded job boards in key markets based on Monster tech and expertise
- digital staffing foundation deployable to multiple markets
- enable experimentation and scale up

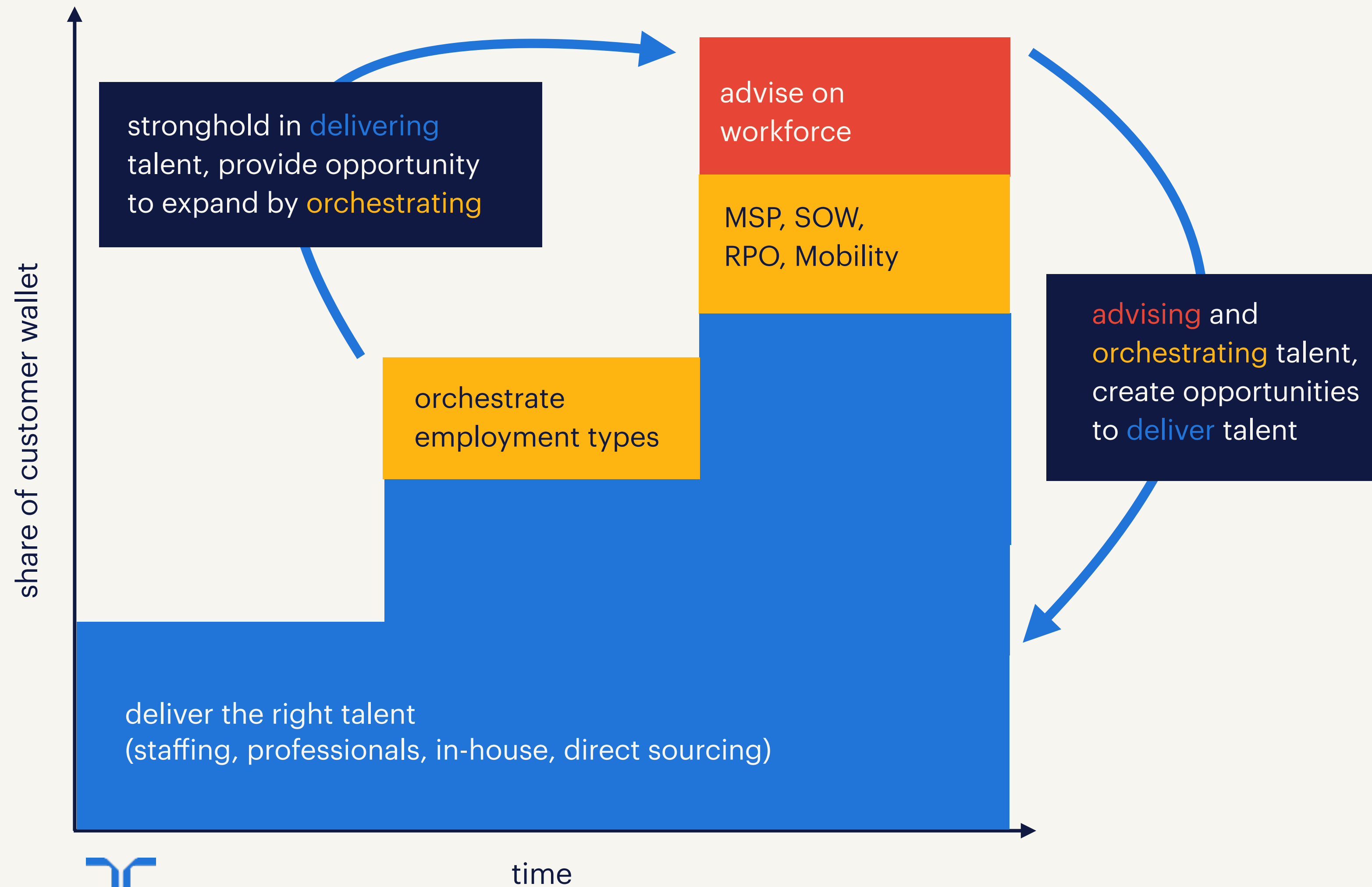


capital markets
day 2021.

randstad

enterprise group.

unlocking full portfolio growth and thus increasing our relevance & influence.



creating a distinct talent advantage

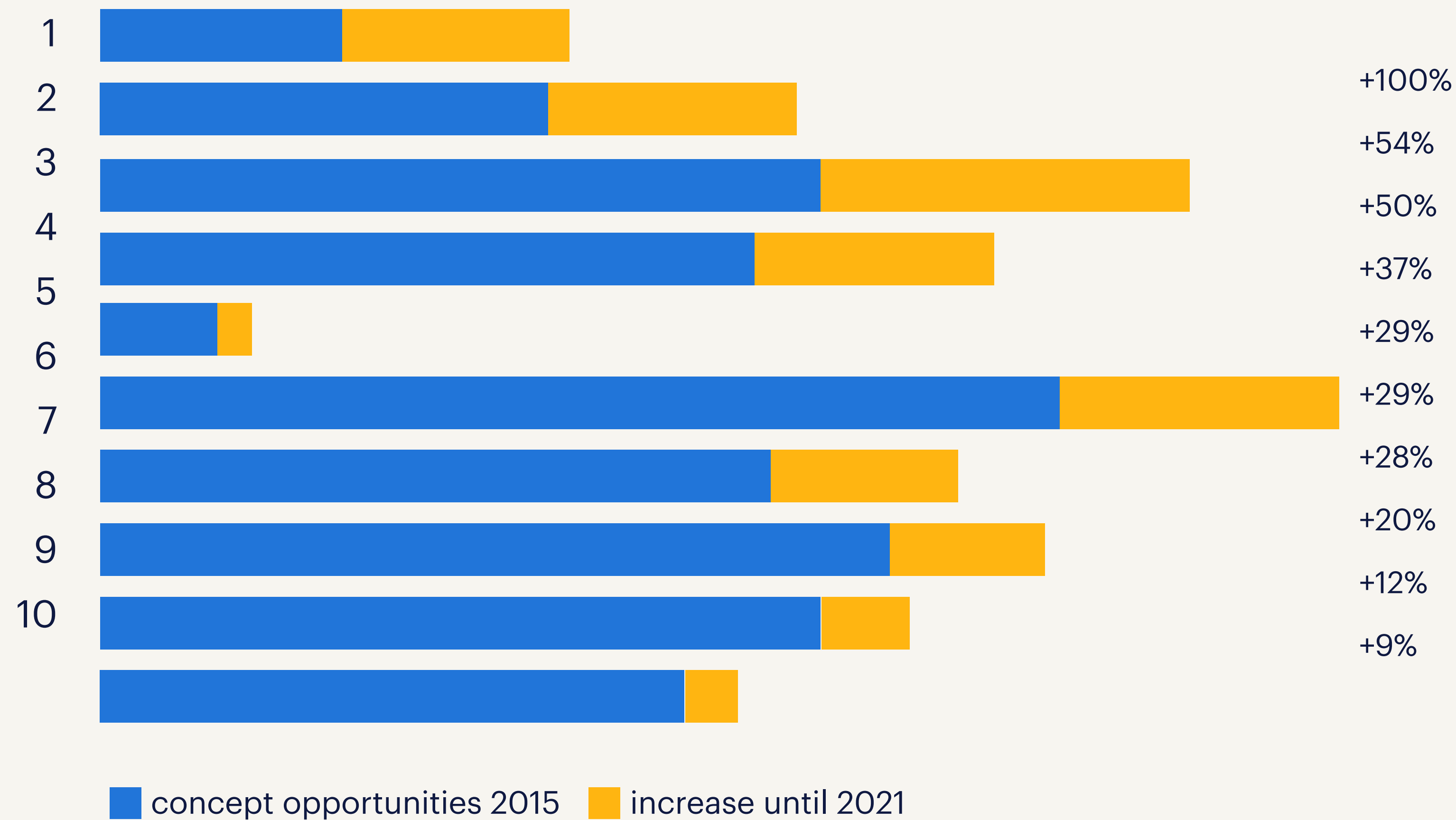
new business models: **co-creation**, strategic value, tech & touch, data insights

work organization: **total talent ecosystem**, location, model mix

talent access: **SOW**, direct sourcing, mobility, platforms

social contracts: **diversity and inclusion**, gig-work, compliance

Randstad Enterprise Group accelerates client development top 10 accounts show stronger service adoption and higher growth



12 x **6**
countries concepts

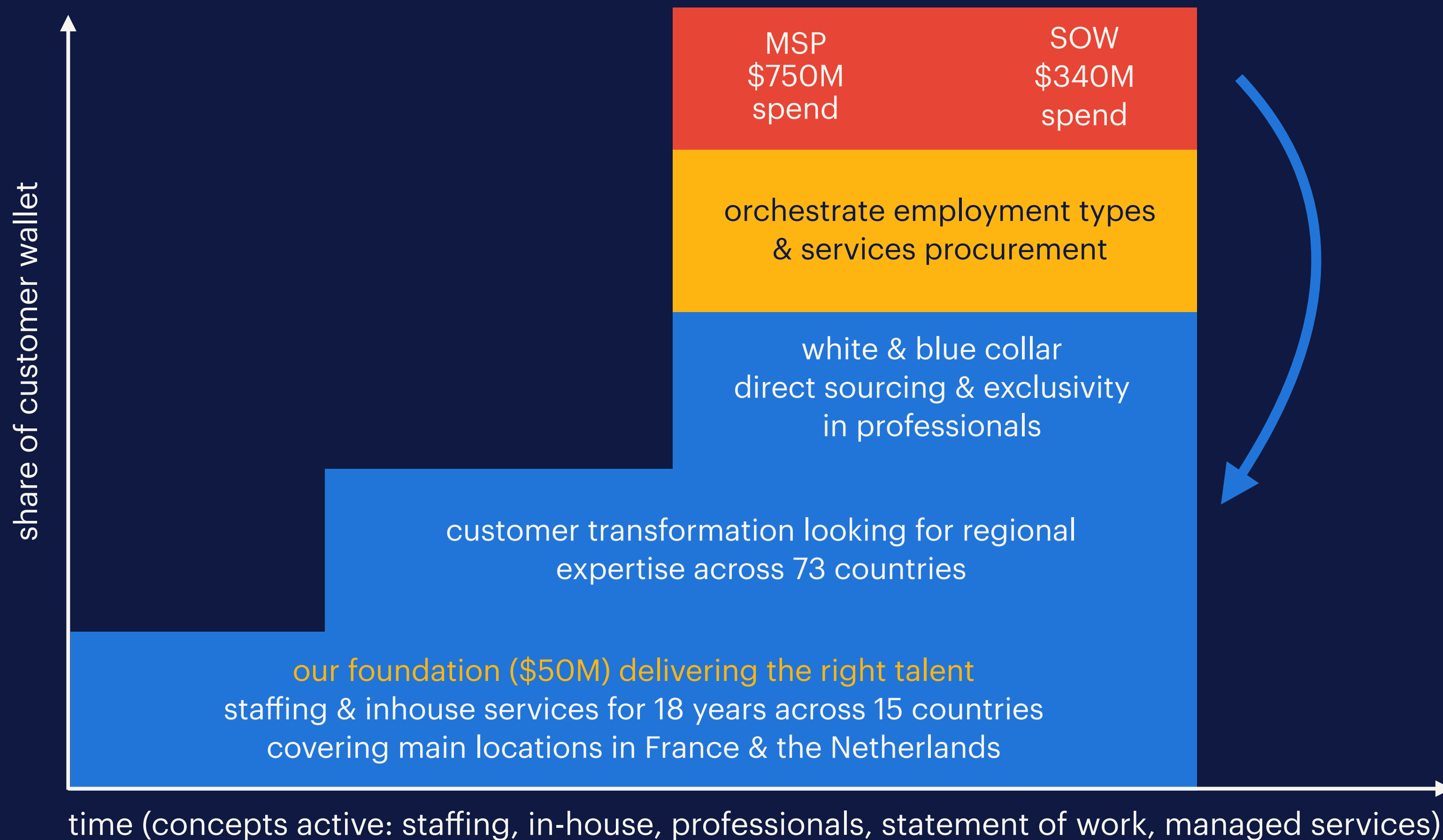
average per client



client case study

transformation of an
FMCG company with
Randstad Sourceright.

transforming contingent talent for a \$35B global FMCG
 contractors represent 30% of the talent population and a
 global spend of \$750M+.



driving customer value

- leverage tech & touch model with global data engine to increase access to talent
- bring global standardization
- reduce risk of compliance issues
- navigate shifts in market dynamics
- optimize workforce flexibility



client case study

talent mobility
management with
Randstad Risesmart.



powering an inclusive future for all Cisco talent mobility.

- always-on talent mobility across the employee lifecycle
- coaching "for all" across the enterprise
- building a sustainable and agile workforce through reskilling
- strengthening Cisco's employer brand

100+
countries covered

96%
satisfaction

75%
landed a
new role

71%
gained
confidence in
career trajectory



capital markets
day 2021.

professionals.



professionals.

- creating value through our portfolio
- global professionals
- North America
- US IT



Karen Fichuk

member of Randstad Executive Board



a differentiated strategy becoming the world's most valued 'work life partner'.

touch the work lives of 500 million people worldwide by 2030



support as many people as possible in realizing their true potential throughout their working life

further differentiate through tech and touch



leverage global collaboration



unlock the power of our data



prioritize talent experience

create value through our portfolio



expand presence in concepts and geographies



lead in winning sectors



grow enterprise clients



seek new partnerships

build on our strong foundation



core values



best people



strong concepts



excellent execution



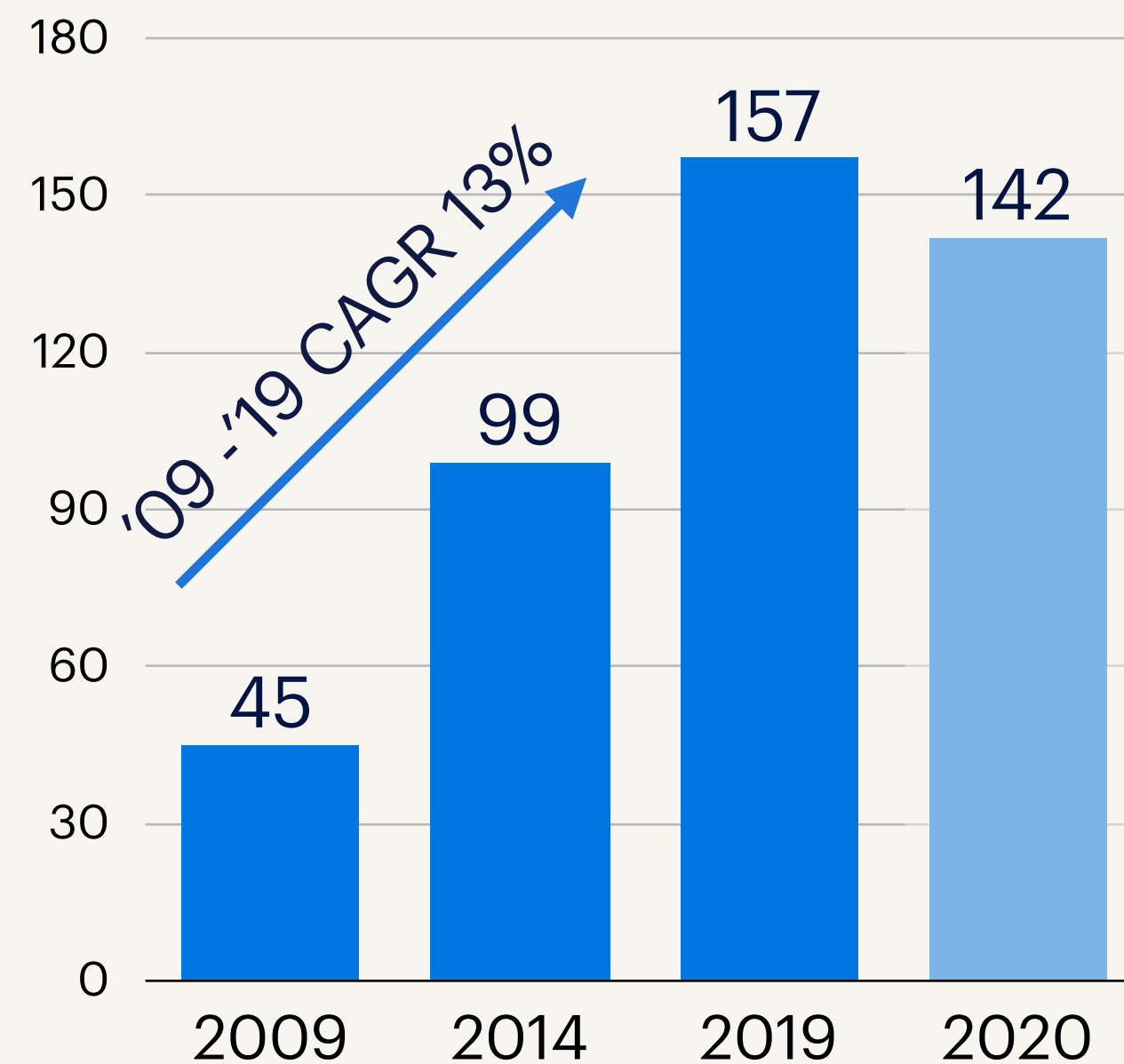
superior brands



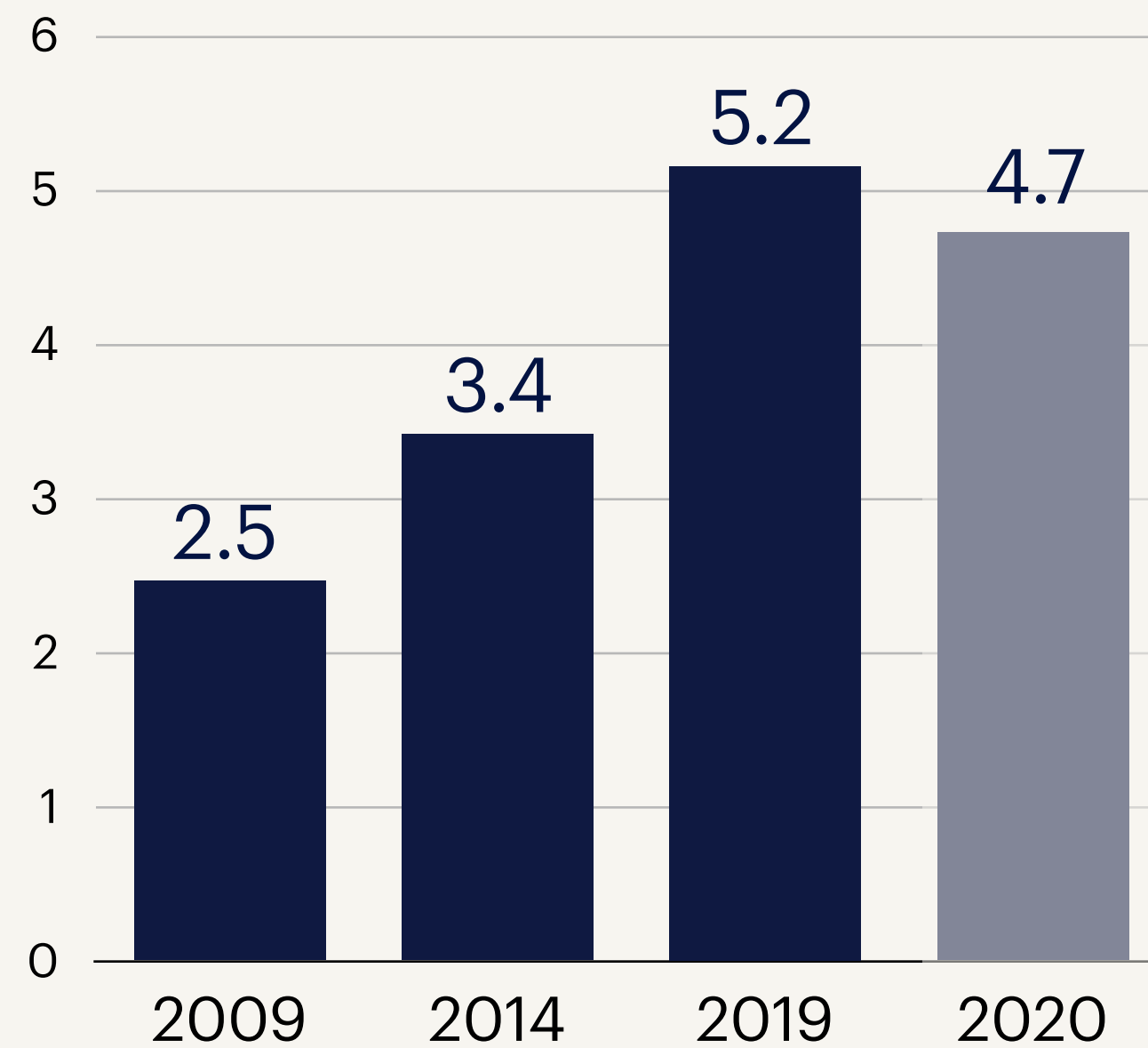
human forward promises

professionals: a long-term attractive growing market.

growing industry demand
2009 – 2020 (in €bn)*



randstad professionals revenue trend
2009 – 2020 (in €bn)



professionals account for >20% of Randstad revenue in 2020; present in 30 geographies.

professionals market growth due to:

- in-demand talent
- Statement of Work (SOW) and output based solutions
- remote working



*source: Staffing Industry Analysts

breadth & scale of our professionals expertise.

IT/engineering

F&A

sales/marketing

healthcare

education



breadth & scale of our professionals expertise.

40,000

professionals
delivering
technical expertise



global IT solutions: Ausy case study. multi-country partnership with Renault.

'AUSY is supporting us for 4 years now through a multi-country solution and had major contributions for the release of our technologically advanced Clio5 and Megane-e products.'

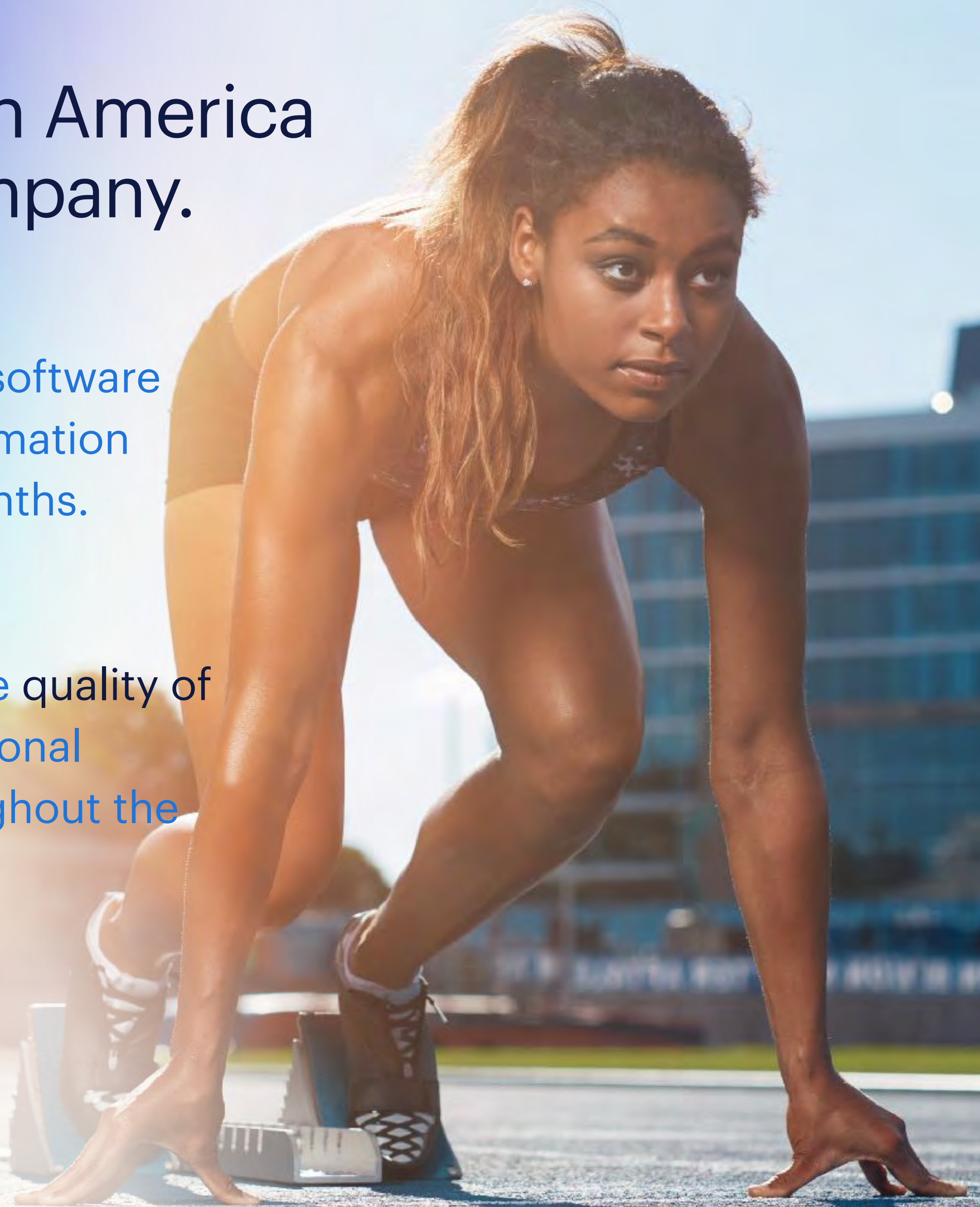
The expertise and global delivery capabilities of AUSY are key assets in the success of our partnership. As part of our 'Renaulution,' we ambition to become a tech company, and look forward to benefiting from further value addition from AUSY teams.'

Julien Battiston, Director,
Head of connected Car Software at SW Factory for Renault

client testimonial from North America a multi-national apparel company.

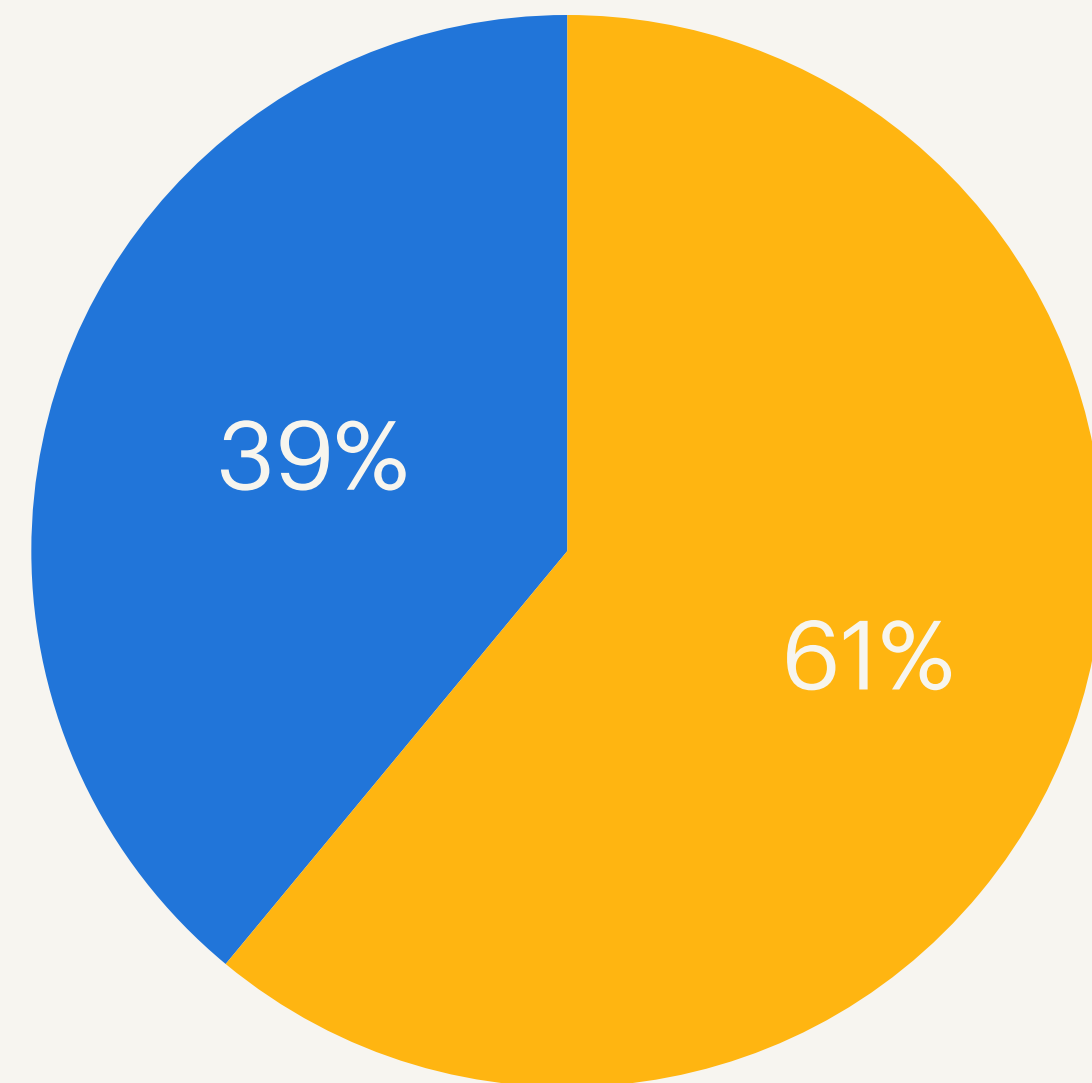
'We were challenged with hiring 80% of our software engineering team and 100% of our Test automation (SDET) and manual testing team within 2 months. Randstad delivered.

They really went above and beyond to ensure quality of candidates, managerial support, and exceptional communication and customer service throughout the process.'



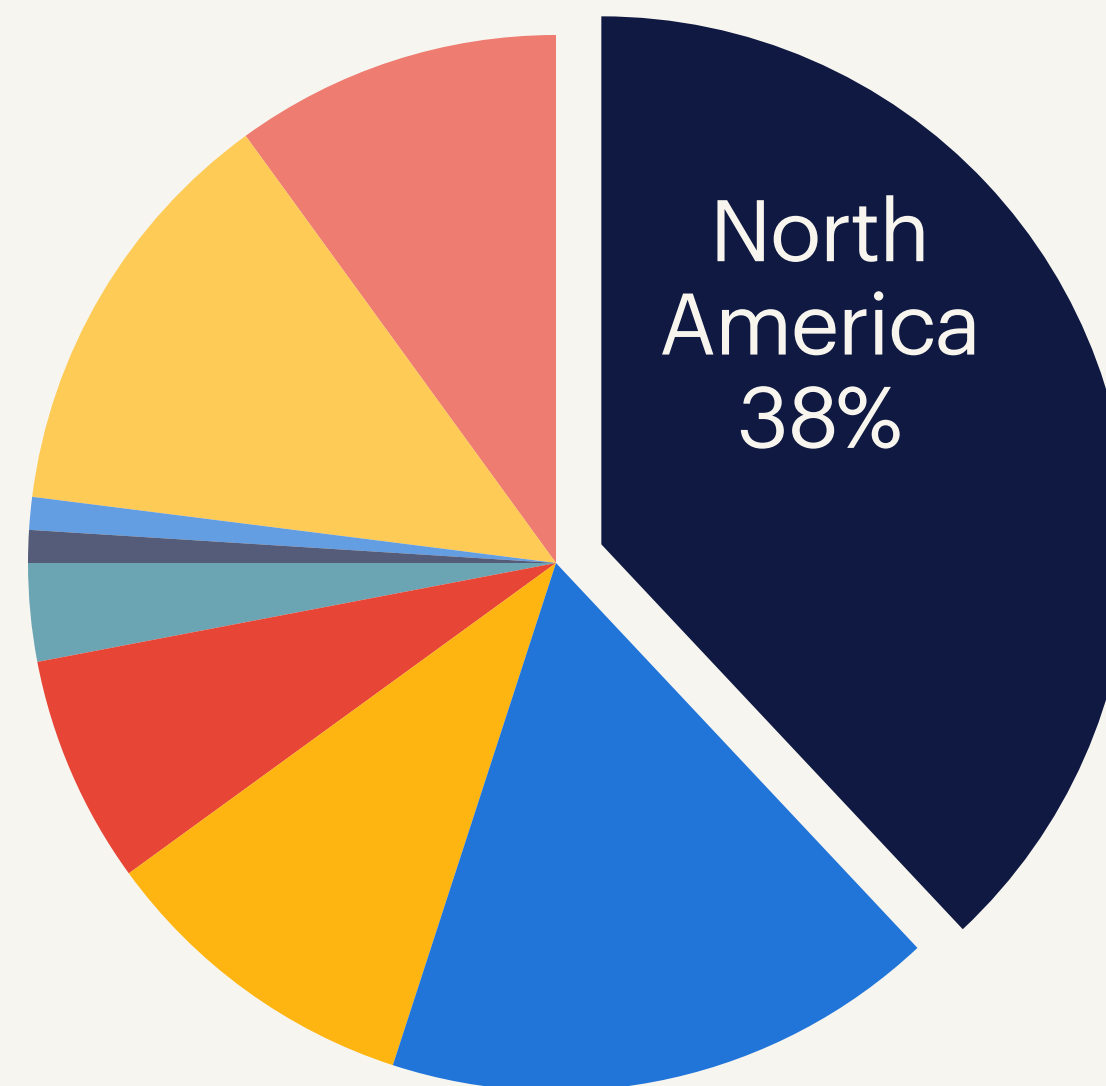
expanding our presence in North America.

market size:
€ 141bn*



● NAM professionals
● NAM staffing

randstad professionals
revenue by market



- North America/US is the largest professionals market for randstad
- 4% market share in US IT; significant growth opportunities



*source: SIA estimates. Professionals excluding SOW

capital markets
day 2021.

US IT professionals growth ambitions: organic growth supplemented by bolt-on acquisitions.

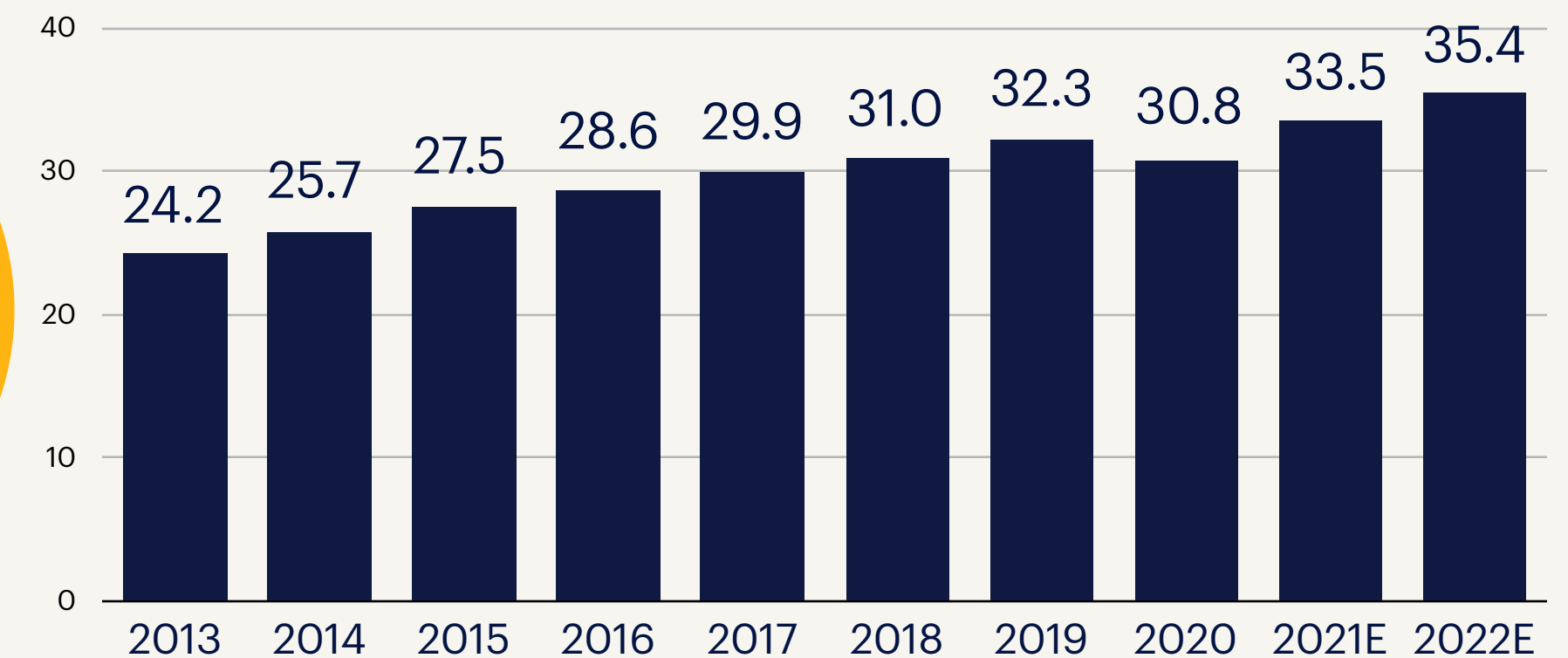
IT professionals business expansion

- producer investments
- enterprise customer & geographic augmentation
- expanded service/solutions capabilities, such as Cella, Inc.
- STEM* offerings

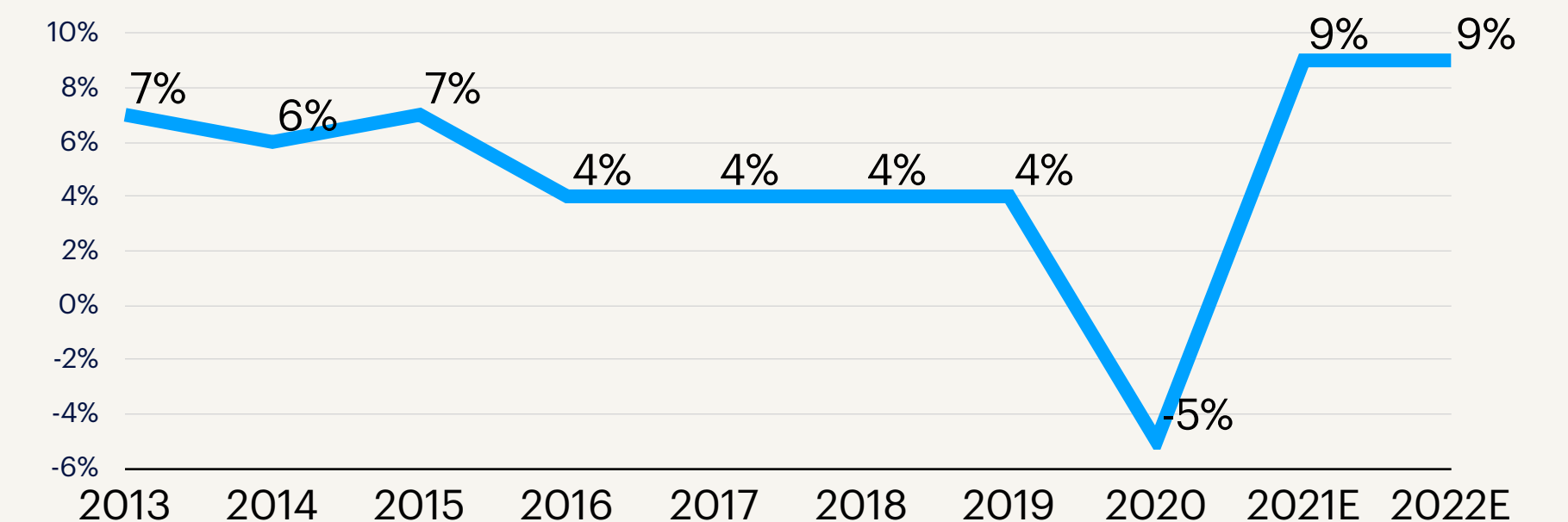
\$ 34bn
IT staffing in
2021

\$ 120bn
commercial IT
solutions/
consulting
in 2021

US temporary staffing market size (\$ bn): IT segment*



US temporary staffing market size year-over-year growth (%) IT segment*



* STEM = science, technology, engineering, and mathematics

*source: SIA

North America headwinds and tailwinds, with labor at the center.

government

- enhanced federal unemployment benefits ended in September
- infrastructure bill passed, a scaled back version of 'Build Back Better' plan



A man in a blue polo shirt and safety harness is working in a factory. He is looking upwards and to the right, with his right hand raised towards a large piece of machinery. The background is a blurred industrial setting with various equipment and structures.

North America headwinds and tailwinds, with labor at the center.

talent scarcity

- openings hit record high 10.9 million this summer
- labor force participation rates slowly improving
- employers responding with pay rate increases, flexibility, sign on/retention bonuses, benefits

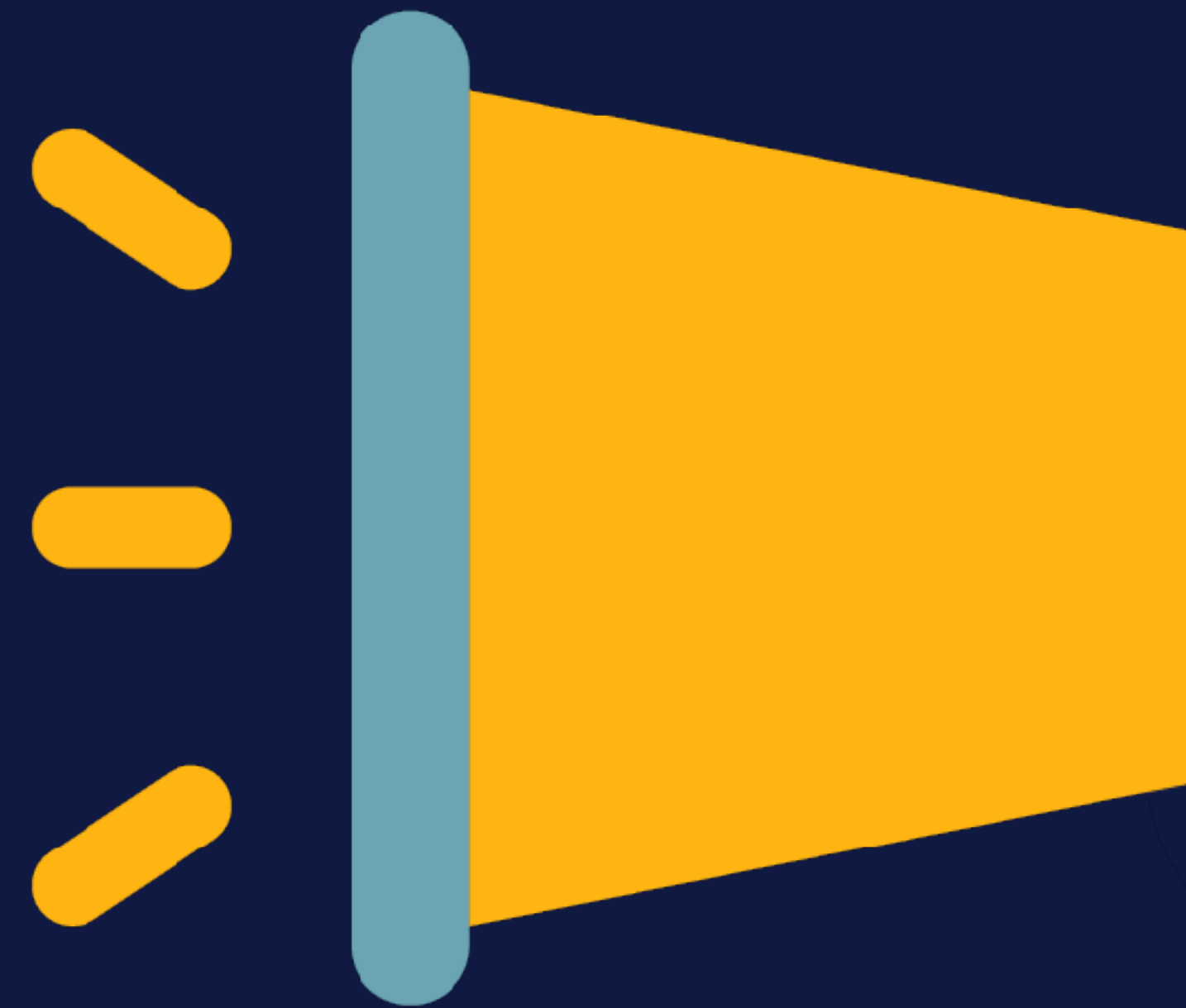
external evaluation from The Everest Group 2021 analysis of US contingent workforce providers.

'Randstad is a market leader'

'IT professionals specializing in application development, enterprise infrastructure, and data services'

'...deeply embedded its staffing services with technology and data and analytics'

'...considerable investments to provide upskilling'



US IT Professionals: how we win.

- specific expertise
- deep customer relationships
- innovation/technology
- talent driven strategy



what does our IT talent say about randstad.

transparent

 Dale Anderson
★★★★★

Very transparent about the process and was never annoyed with my many questions about where the process stood, which some recruiters, in my past experience, can be.

care about me

 Anonymous
★★★★★

The recruiter that I dealt with and its account manager were absolutely stellar!! They were responsive, paid attention to me and what I was looking for, and really seemed to care about me and the client. They made sure I didn't have any questions and did their best to prepare me for my interview.

I am completely impressed.

saw my potential

 Josh van Hulst
★★★★★

Many times when I could not find work on my own accord, I was always received friendly help from some of the best recruiters in my area. They always saw my potential and placed me in roles that I had no past experience in. I felt randstad really gave me the opportunity to find quality roles that I really enjoyed working and each client I represented provided great feedback.

how we win: our people.

- we trust in technology
- 7 out of 10 internal employees said they would do it (join Randstad) all over again
- we recognize effort and results
- most importantly, we have fun!
- we give back, all over the world
- recognized as a leader in equity, diversity & inclusion



staffing & randstad culture.



staffing & randstad culture.

- introduction
- staffing: a long-term attractive market
- a differentiated talent strategy
- build on our strong foundation

A portrait of Chris Heutink, a middle-aged man with short, light-colored hair, wearing round glasses, a white collared shirt, and a dark blue blazer. He is looking slightly upwards and to the right with a thoughtful expression. The background is a blurred, bright blue and white setting.

Chris Heutink
member of Randstad Executive Board





▶ the **best job** in the world

the ideas and practice of **Frits Goldschmeding**, founder of Randstad



the legacy of
Frits Goldschmeding

passionate
entrepreneurship



the Randstad culture

Culture is about perceptible matters within a company, such as the working environment and working conditions, the values and standards that determine how things are done and about the employees' underlying convictions and beliefs. At Randstad, all these aspects are seamlessly matched.

the core values

Randstad's five core values comprise the concrete interpretation of the corporate philosophy developed by Goldschmeding: a genuine concern for the interests of all involved and the striving for perfection.

These core values determine the corporate culture. They clearly define how employees behave towards each other, their clients and everyone around them. Together, these are the criteria by which employees make their daily choices and decisions.



blue blood

Trust and a strong sense of connection with the organization are important components of Randstad's corporate culture. All over the world, employees feel part of the greatest Randstad-family. They feel they have 'blue blood' surring through their veins. Modern management literature describes these cultural traits as success factors, but Goldschmeding has always intuitively felt that these are basic human needs. If you

otherwise, but in fact you're angry with yourself. You obviously haven't provided the right arguments. Being slightly angry with yourself will inspire you to do better next time. That's how you learn. You'll find that an employee who's been with us for a few years, who's gained a lot of experience and received ample training, is able to serve their clients more easily and intuitively than they did during the first



to know, to serve, to trust

by challenging them, preferably incorporating a fun element. And by giving them space by ensuring that they enjoy their work and are proud of their achievements. They then automatically become great entrepreneurs! Autonomy also requires skills, something which has always been high on Goldschmeding's list of priorities. 'Good training that ensures that employees have the right skills is vitally important. That's something you constantly have to invest in. And not just through training; you have to set the right example and keep communicating. And support them with the right tools and give them plenty of feedback.' His assumption was that people are always willing to improve themselves. 'If a client tells you they don't need you, you may be angry that you can't convince him

quality image.' Other factors that help create that unique Randstad feeling are an attractive and pleasant working environment, good career opportunities and excellent remuneration. And above all: a lot of personal attention. 'Communicate, inquire, praise. And then not with bonuses. People don't work for bonuses. We're not dogs chasing a bone, are we? It's better to offer new opportunities at the time and facilitate personal growth.' This also generates 'loyalty.'



Robbin Brugman | managing director group business concept development



'The mind and heart of Goldschmeding's

tech & touch.

'Don't be surprised if someone enters the room with a vacuum cleaner. We believe, like Goldschmeding always has done, that cleaners must be able to do their work in the daytime, rather than only at night. It's our social conscience.

However, the world has changed. The old way of working no longer fits the bill. We still provide highly personalized services, but we communicate and interact differently. Both with clients and with candidates. Take the Netherlands, for example - over 50 percent of the orders are received online. We are involved in complex

MSP & RPO, which are in the early candidates uses Facebook no longer are no longer prospects

Work has to be fun and offer concrete milestones. Preferably, they want top positions from the very start. So they search in a different way. Today, we use many human resource technologies that are almost automatic matching. Often, you don't even need physical offices: presourcing and sourcing can be done from India or Malaysia, or anywhere in Europe. The consultant's role is shifting more towards advice and sales. It's becoming a different balance of tech & touch. There's a war of talents

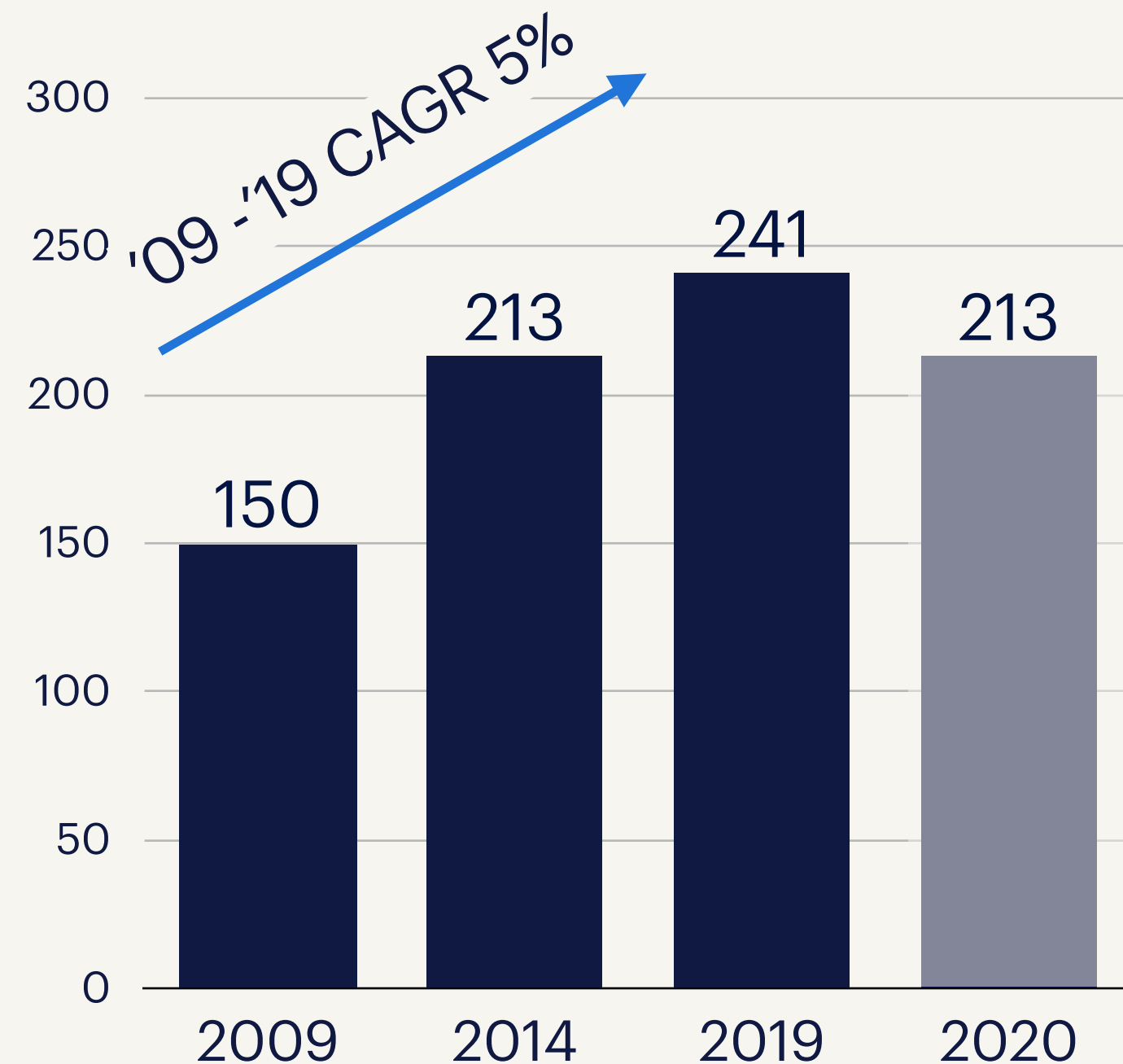
going on, so we have to search passive labor markets, professionals who are employed elsewhere, by building up networks. These talents no longer visit a branch office, but search their own communities. And these are just a few examples.

You can say we have adjusted to today's reality. Still, a number of Goldschmeding's basic principles still stand. Both in terms of business logics and culture. I like to call it mind and heart. There aren't many companies that have a strong concepts department. Such concepts have proven their worth: valuable basic processes that work in 80 percent of all countries around the world. The other 20 percent depend on local culture and laws. In other words, it's a form of standardization. It exemplifies Goldschmeding's lily pad model - which is to split up and copy a process as a growth model. It also describes the principle of managing the smallest entity - a team - rather than managing on averages. We also share our culture and our standards and values wherever we can.

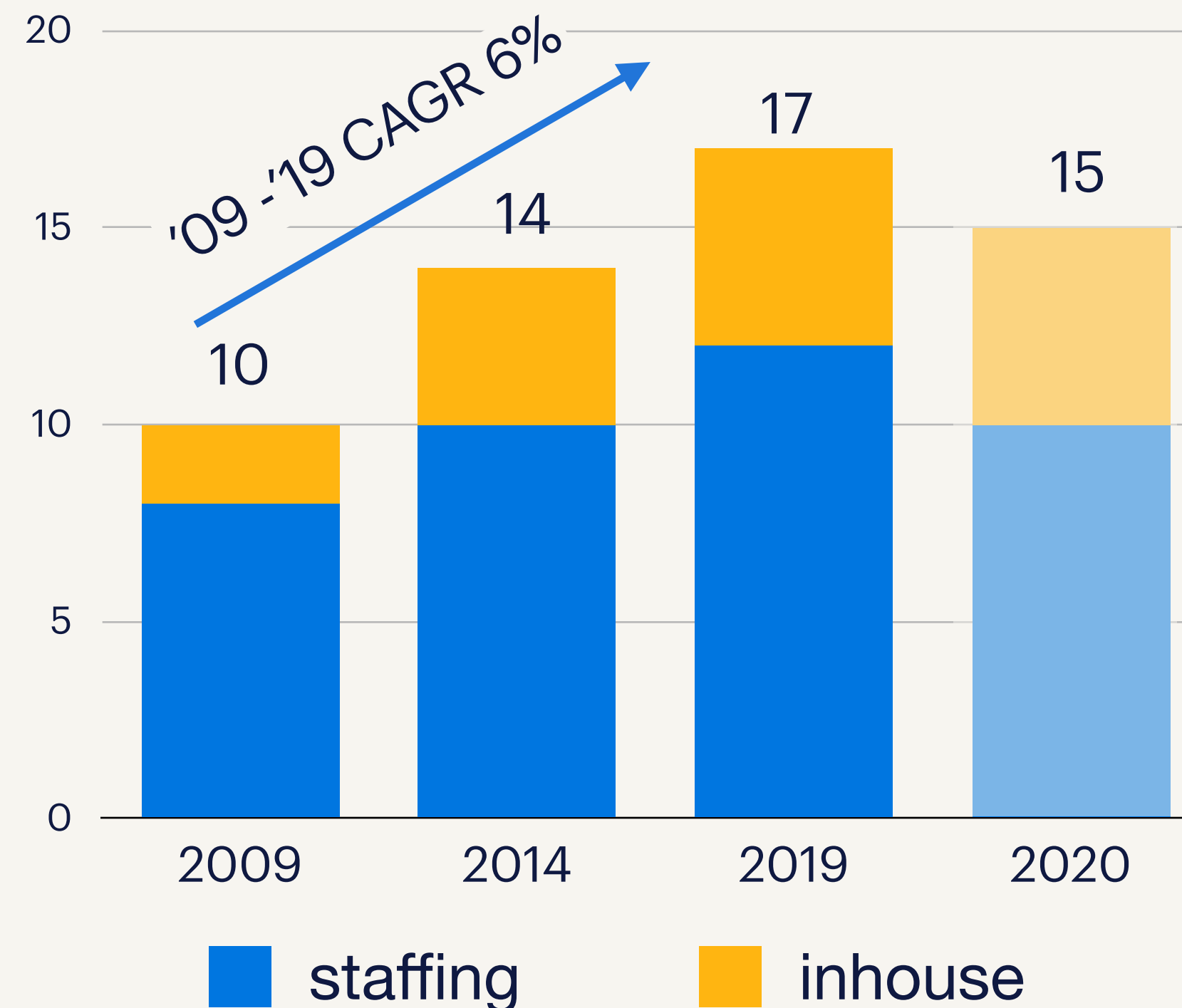
The old guard may believe we've become hard and that everything today is about money, but we still invest more time in people than any other company. We give them plenty of opportunities to develop and are still very person-oriented. That still has a big influence on our way of working. Goldschmeding has always managed to perfectly balance business logics and culture, and we still do that today.'

staffing: long-term attractive growing market we are the global leader and have room to grow exponentially.

growing staffing industry demand
2009 – 2020 (in €bn)*



randstad revenue trend
2009 – 2020 (in €bn)



delivering the right talent,
right quantity at the right
time integrated with digital
solutions.

staffing and inhouse
account for >70% of
Randstad revenue in 2020;
present in 38 geographies.



*source: Staffing Industry Analysts

staffing

a long-term
attractive market.

staffing is the core of what we do and it continues to be a long-term attractive market.

dynamic and attractive in the long-run.

we at Randstad, the global staffing leader, are well-placed to further expand our leadership position

- 7% market share in the global staffing market
- growing opportunities emerging in sectors like gig economy, digital and more

benefiting from trends.

- increasing demand for flexibility: a job for life is a thing of the past
- change is the new norm: type of work and job roles are changing. shifting mix of occupations
- unprecedented speed of technological progress is changing how services are delivered
 - staffing more used as part of value chains
 - new forms of work emerging from tech/digital businesses

serving our customers on all levels increases our share of wallet from transaction services to long-term value creation.

sustained need for agility and flexibility.

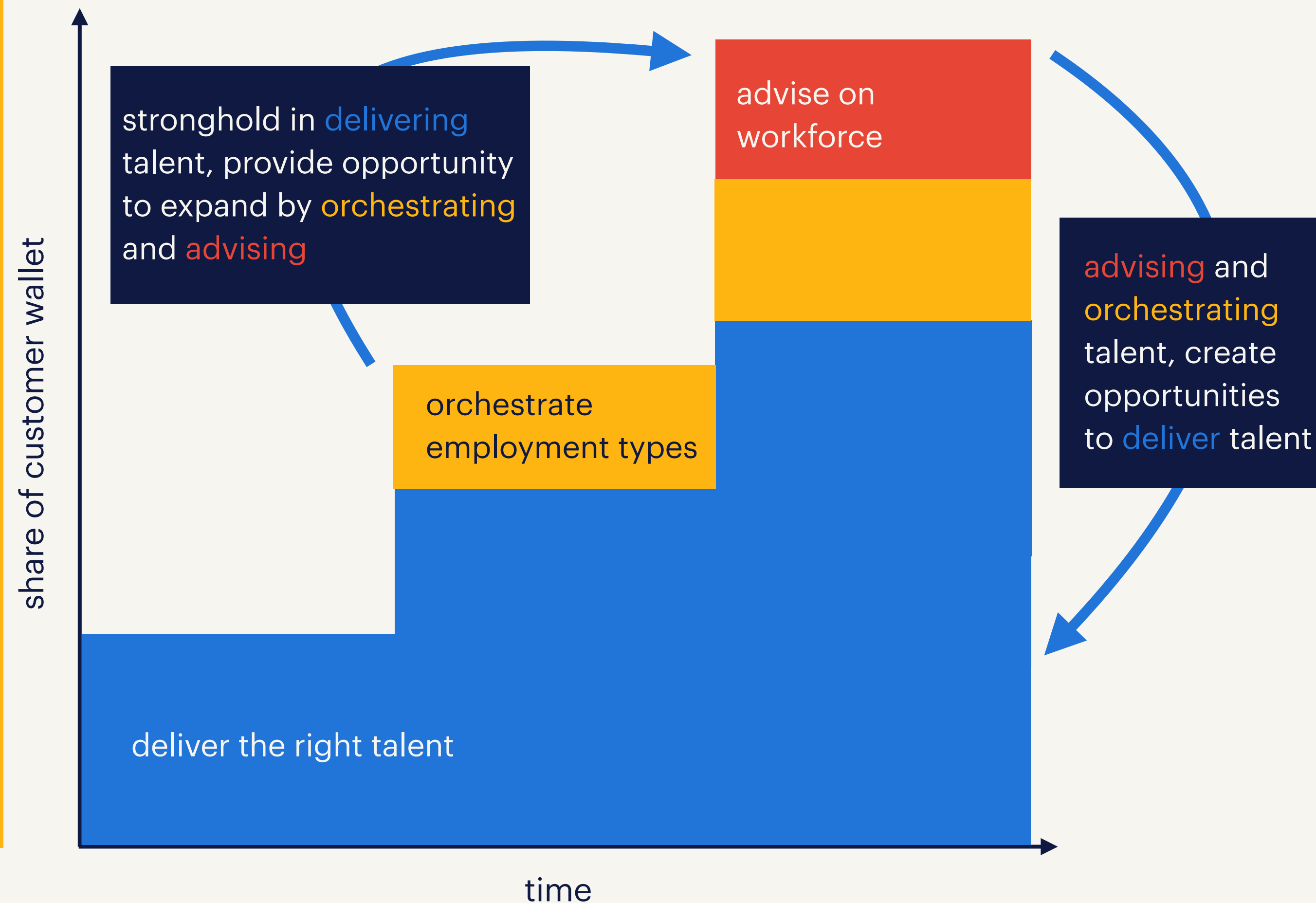
we are evolving from transactional to long-term, value-creating relationships with our clients.

Scania case study

- evolution of our inhouse concept
- exciting growth potential for inhouse

Bosch case study

- evolution of our staffing concept
- strategic relationship



matching portfolio concepts.

human capital management
talent mobility

MSP & RPO
inhouse
gig

staffing - temp & perm

the sustained need for touch in a world of transition is present
we are getting faster and better at enabling personalization at scale.

digitization of staffing
improves our services.

- omni channel or stand alone
- E2E digitization of our processes - freeing up for moments of touch that matter - help more people - leads to more effectiveness
- continuous digital improvement: chatbot, AI candidate matching, automated scheduling

our omnichannel strategy offers randstad a starting point to evolve by adapting an automated business model.

ultimately, enabling us to deliver winning end-to-end digital journeys at scale:

- sector specific solutions
- large client base
- existing broad geographical footprint

intensive experimentation of investments to be scaled into new businesses.

a differentiating talent sourcing strategy a unique & personalized lifelong relationship with our talent.

the role of work in people's lives is a constant.

talent expectations lie at the heart of our strategy.

- talent currently needs a separate partner at every step of their journey. randstad perfectly solves this need
- employ tech and touch services to support talent at each step
- building relationships with talent
- customer delight and your best self



building on our

strong foundation.



5,000

new colleagues





a people's business



years



over 40,000
employees

ore know more know more

st more trust more trust m

serve more serve more se

thank you



why are we here today?

- demonstrated through the pandemic: our industry is more relevant than ever
- traditional recruitment process is changing
- attractive market with structural growth opportunities
- Randstad is well positioned for further growth and creating sustainable value:
 - leveraging our data-driven insights and unrivalled scale and breadth of services
 - we combine Tech and Touch to make our offer unique

have a look at our presentations & technology demonstrations.

MONSTER



deep-dive
presentation

randstad
market
insights

gig economy:
employee
compliance

AI
conversation
engine

talent
sourcing
strategy

