

# superior brands

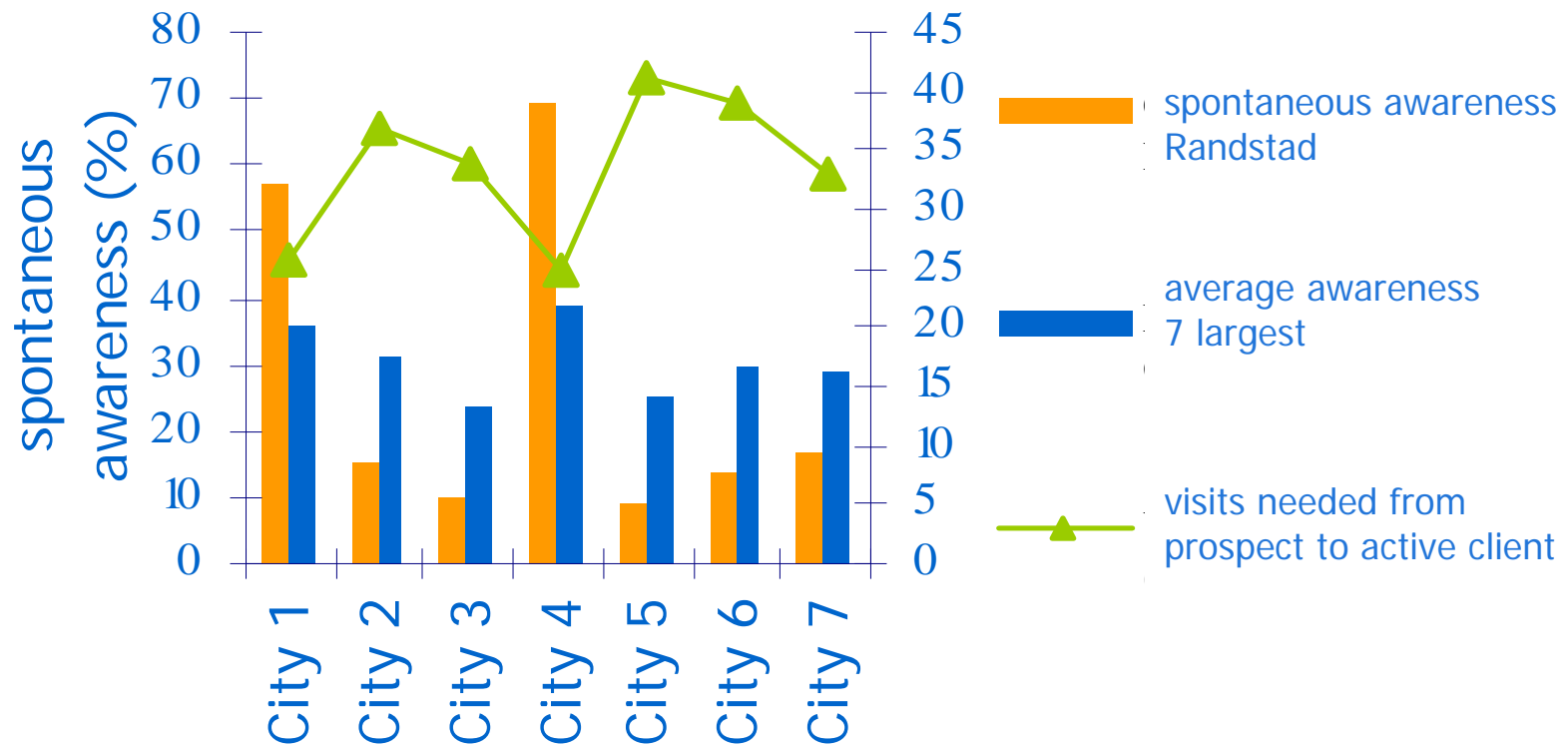
## definition

- top of mind awareness within target audience > market share region
- image score relatively higher than awareness score and in top 3 peers
- efficiency score: 89% of costs on advertising and 11% on making materials
- press profile score: above market share and top 3
- web profile score: 'Blue2' type site by end 2009 (major opco's)

we want superior brands because they must give us:

- better pricing options
- faster/easier selling and prospecting
- faster/easier introduction of new products and services
- easier recruiting/keeping of the right people
- better visibility towards regulators, lawmakers etc
- more supportive investors and more financing options

# superior brands: spontaneous awareness vs. client visits



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- higher awareness = easier sales process ... by some 40%!

source: data Randstad Spain

# superior brands: professionals

- where we stand
  - high revenue in professionals but no clear brand awareness and recognition

**executive search:** € 7,5 billion  
(top-level head hunting)

**specialist & professionals:**  
> € 50 billion  
(predominantly "white collar")  
(includes perm placement  
market estimated at > € 20  
billion)

**staffing:**  
± € 180 billion

Korn/Ferry	€ 550 M a)
Heidrick & Struggles	€ 450 M
Egon Zehnder	€ 400 M
Robert Half	€ 3700 M
<b>Randstad+ Vedior</b>	<b>€ 3250 M b)</b>
Adecco	€ 2750 M
Hays	€ 2300 M
MPS group (multibrand)	€ 1750 M
Michael Page	€ 1450 M
Manpower	€ 750 M
Adecco	€ 18500 M
<b>Randstad + Vedior</b>	<b>€ 14400 M</b>
Manpower	€ 14300 M
Kelly	€ 4700 M
USG	€ 3900 M

a) all are rounded estimates, from various sources and analyst reports

b) Vedior € 2650 M, Yacht/Teccon € 600 M  
Randstad also has about € 750 M "white collar" specialties included in the generalist staffing business





# branding overview: progress, target

	starting situation May 2008	situation based on approved plans May 2009	when including professionals also: by end 2009:
revenue under Randstad branding incl. house style, but in profs often different logo (* billion)	€ 8	€ 12*	±€ 15*
percentage of total combined business under Randstad family	45%	65%	>90%
percentage of ex-Vedior business into families (inc.TT)	0%	50%	>95%

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\* based on 2007 proforma revenue

# progress on re-branding general staffing

geography	former brand	new brand
Europe	<ul style="list-style-type: none"> <li>• Vedioorbis France</li> <li>• Dactylo NL</li> <li>• Select UK</li> <li>• Vedior Germany</li> <li>• Select Spain</li> <li>• Vedior Spain</li> <li>• Select Cyprus</li> <li>• Vedior Italy</li> <li>• Vedior Switzerland</li> <li>• Vedior Poland (various brands)</li> <li>• Select Greece</li> <li>• AYS Czech Republic</li> <li>• Vedior Netherlands</li> <li>• Vedior Belgium</li> <li>• Vedior Luxembourg</li> </ul>	  
Americas	<ul style="list-style-type: none"> <li>• Placement Pros</li> <li>• Select Mexico</li> <li>• Select Chile</li> </ul>	
Asia Pacific	<ul style="list-style-type: none"> <li>• Select Australia + 18 other Australian brands</li> <li>• Team4U + other Indian brands</li> </ul>	



Q1 2009: as a result of the above, at least 75% of the total Group is trading under the Randstad and Tempo-Team brands

# superior brands: professionals strategy

work in progress

- good progress

branding

- keep existing brands; rebrand if opportune; no radical changes
- ultimately on 31.12.09: add 'a Randstad company' tagline
- get look & feel of a Randstad professionals brand
- new style to be developed before year end; consultation of major operating companies
- considerable saving on production costs which can be reinvested in presence (potential annual savings of EUR 25 million)
- creates possibility for sharing locations

# superior brands: professionals folding MWA into search & selection house style

recruitment specialists

**DIGITAL TALK Finance Director**

to £80,000  
+ car + bonus  
+ benefits

Milton Keynes

**MWA**  
martinwardanderson

Our client is one of the most dynamic and fastest growing technology organisations in Europe. The company which has a network of international sales and support offices develops advanced telecom solutions for next generation service providers.

Reporting to the Managing Director and as a key member of the Board this role will be pivotal to the future growth and success of DIGITAL TALK.

Your responsibilities will include:

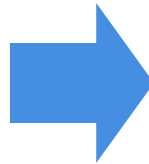
- Providing top level financial reporting and analysis
- Developing and achieving objectives as a core strategy
- Maintaining high level commercial relationships
- Assistance in the expansion whilst maintaining financial integrity

The ideal candidate will be a qualified accountant with a minimum of five years post-qualified experience and a proven track record of managing growth in a technology company. Experience of setting up and managing European operations would be desirable.

Your technical experience will be substantial. More importantly your personal qualities will be outstanding. You will have a flexible and proactive approach coupled with significant commercial acumen. In addition an engaging personality will be necessary to develop and maintain strong relationships with business partners.

This role offers an exciting opportunity to make a real difference in a high growth and challenging working environment.

Interested candidates should forward their CV quoting reference 292362, to: Wanda Preece at Martin Ward Anderson, 252 Upper Third Street, Grange Gate East, Central Milton Keynes, MK9 1JZ or visit [www.martinwardanderson.com](http://www.martinwardanderson.com)



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professional, structured to deliver

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professional recruitment

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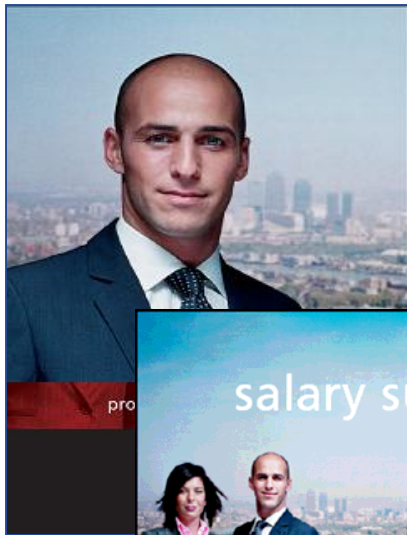
salary survey

2007/2008

**MWA**  
martinwardanderson  
a financial company

2007

# superior brands: professionals search & selection brand family



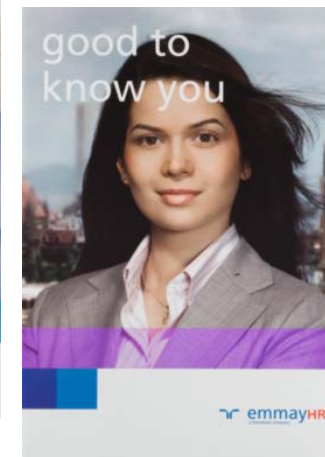
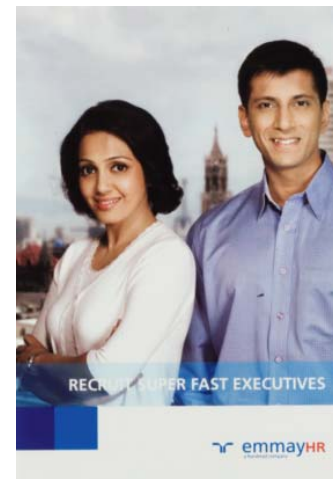
MWA



Randstad



EmmayHR



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- visibility & recognition can be created relatively easily
- search & selection style is just an example; the professionals style will be different