



The world of work is being shaped by 5 megatrends



Developments in areas like robotics, artificial intelligence and 3D printing will reduce repetitive and low- to middle-skilled jobs in the manufacturing and service industries. At the same time, they will create new jobs that do not exist today. Technology will also enable more efficient and effective labour market intermediation. This will change business models in our industry.

Aging and fertility trends in Europe, North America and parts of Asia will mean shrinking labour forces and higher dependency ratios, leading to skills gaps and pressure on welfare systems.

Migration from countries with younger and growing populations will become a topic of increasing importance.





New forms of social interaction are driving new employment models in the 'sharing,' 'on-demand' and 'away from home' economies. Flexible working arrangements such as freelancing, telecommuting, temporary work and SOW consultants will increase. These sociological trends are already taking hold: contingent workers already account for a third of the global work force – a \$3tn market.

Today's political and economic landscape has been described as Volatile. Uncertain. Complex and Ambiguous. Governments and businesses are seeking greater access to talent and increased workforce flexibility to drive economic competitiveness and growth. They will increasingly look for total workforce solutions to achieve these goals.





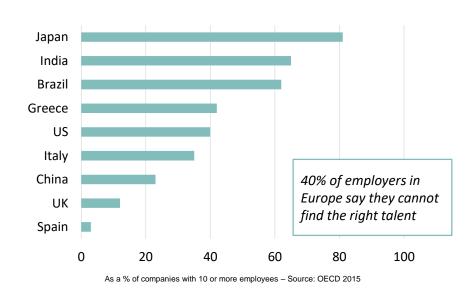
Traditional employment structures with guaranteed benefits are shrinking rapidly. The "precariat" is expanding; income and wealth inequalities are large and growing. These are the preconditions of social unrest, political upheaval – and regulatory intervention. These challenges will continue.

Employers face skills gaps – new jobs require new skills & attitudes

- 200 million people unemployed
- Yet 40% of employers can't find the right profiles
- Routine and knowledge jobs at risk of (partial) automation
- And the nature of work is changing: collaboration and co-creation are key and a multi-career is the norm









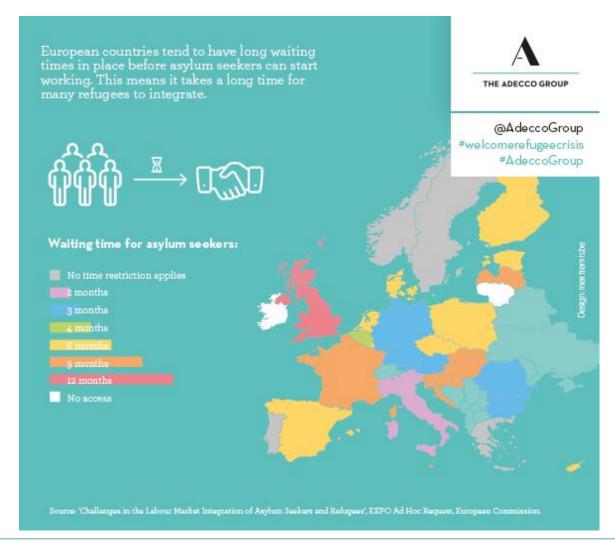


The growing skills gap shows: we need all the talent we can get... Including refugees

What obstacles exist for labour market integration of refugees?

Many asylum seekers are not allowed to work (yet)

- In 21 EU states asylum seekers face a six months or longer wait before being allowed to work
- It takes between five and six year to integrate half of humanitarian migrants and as much as 15 years to reach a 70% employment rate.



Companies show willingness to hire refugees, but are held back by practicalities



Sources: 'Flüchtlinge erfolgreich integrieren', Wir Zusammen - 'Challenges in the Labour Market Integration of Asylum Seekers and Refugees' European Commission, OECD.





The Adecco Group sticks to its core business: workforce solutions

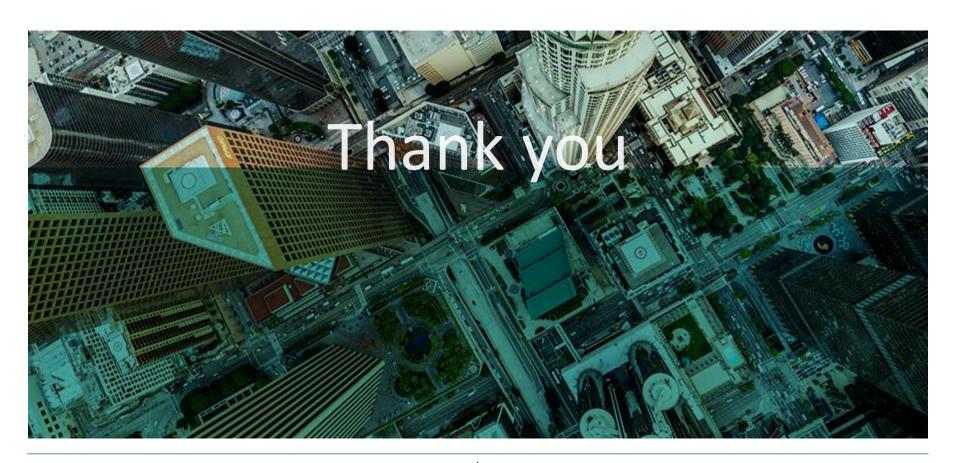
The role of The Adecco Group in supporting labour market integration of refugees:

- 1. Facilitating the match between employers and candidates (refugees & asylum seekers)
 - Workeer.de, a recruitment platform dedicated to refugees in Germany
- 2. Creating Valuable networks
 - The Adecco Group acts as labour market intermediary, liaising with its key stakeholders: business, governments, training providers etc.



- 3. Identifying and providing additional support needs
 - The Adecco Foundation Italy has been placing and supporting refugees since 2008, identifying the most relevant sectors, and providing targeted additional support: language courses, vocational training, job orientation, internships and tutoring, cultural training etc.
 - The Adecco Group France partners with NGO Humando to implement a govt. funded programme offering training, social events, housing and citizenship support.
- 4. Making refugees' skills transparent for potential employers
 - The Adecco Group offers over 2 million assessments each year Skills/knowledge (including language), cognitive ability, behavior/attitude, motivation/work preference.







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The Adecco Group's 5 recommendations for successful labour market integration of refugees



Time is erucial

Non-participation in the labour market causes high costs not only for the host society but also for the perspective employer. It results in a loss of skills, motivation and social competences.

Countries should:

- Reduce the time necessary for the application procedure
- Allow early access to the labour market and education
- Fast track solutions for refugees with high probability of international protection

Recommendations stem from interviews with and research from a variety of sources such as: The Adecco Group colleagues, Reallabor, OECD and the UNHCR.



Skill transparency means resource efficiency

One of the main reasons for employers not to employ refugees is uncertainty about their qualifications. Refugees have numerous formal and informal skills – most of them (90%) have participated in a formalized education system in their home country.

Countries should:

- Ensure targeted, large scale and systematic procedures for skills assessment and qualification recognition are in place
- Agree on and work with internationally harmonized certification systems for non-formal skills and additional qualification
- Include skills assessment and/or qualification recognition early on - i.e. already during application
- Promote information linkage and transparency on skills via e.g. online platforms



Refugee dispersion and support needs to be labour-factored

Due to demographic change and economic prosperity labour demand is pressing in some European regions. At the same time labour market integration is the most relevant single integration indicator because it implies a number of other central integration issues such as the improvement of language skills, social integration and a non-state-dependent living.

Countries should:

- Ensure dispersion of refugees is based on employment factors like e.g. individual profiles, local labour market conditions and specific local shortage occupations
- Offer status security during vocational trainings and employment independent of asylum procedure and encourage combining language courses with work experience
- Avoid penalization of job related 'secondary migration' of refugees after initial dispersion
- Offer bridging courses to develop country specific skills on the base of prior qualifications in home country

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Potential external support should be well targeted

Refugee support and guidance have to take into consideration systematic differences between the countries of origin as well as individual differences. One-size-fits-all approaches are inefficient not only for the refugee but also for the employer.

Countries should:

- Offer targeted, systematic and individual needs assessment and quality guidance to develop an individual integration plan
- Ensure diversification of language courses by e.g. education level and professional sphere
- Provide comprehensive professional, cultural and civic orientation
- Establish and promote mentoring structures
- Focus on special needs of growing diverse groups like e.g. unaccompanied minors or psychologically traumatized refugees.



Integration is networking

The recent refugee immigration is getting Europe active. "It takes a village to integrate a refugee".

Countries should:

- Provide one-stop shops for employers for the concrete employment procedures
- Create regional integration hubs linking employers, potential employees, support structures, administration and information on host as well as home countries
- Promote coordination and training of volunteer support in labour market integration

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The European refugee welcome crisis - an overview www.adeccogroup.com