

THE ADECCO GROUP

Adecco AKKODIS LHH

Making the future work for everyone

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Kompetenstagen, 22 April 2026

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graph LR; A[Changing world of work] --> B[Regulation framework is lagging]; B --> C[New ideas for action]
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Changing
world of
work

Regulation
framework
is lagging

New ideas
for action

About the Adecco Group

1

Define workforce strategy

Workforce planning	Workforce analytics
Regulatory expertise	Process optimisation
MSP	Supplier optimisation
Talent market watch	Salary benchmark
Future of work trends	Advisory

2

Attract, hire, deploy

Executive search	Employer branding
RPO/RXO	Hire, train, deploy
Flexible jobs	Permanent hire
Outsourcing	Apprenticeship
Diversity, inclusion & social impact (DEI)	

3

Skill, develop, transition

Workforce transformation	Assessments
Re/Upskilling	Academies
Leadership development	Soft skills
Coaching	Career transition
Career mobility	Inclusion path (DEI)

4

Transform and evolve

Product & system development	Technical consulting
Cybersecurity	Robotics
R&D outsourcing	Virtual Reality solutions
IT Digital backbone	Operations management
Data Analytics & AI	IoT (Device & Testing)



The changing world of work

The background features a horizontal color gradient from teal on the left to red on the right. Two overlapping circles with a purple-to-yellow gradient are positioned on the right side of the image. The top circle is larger and partially overlaps the bottom circle.

Navigating a new world of work



Geopolitical and
economic
uncertainty



Gen AI
revolution



Skills shortages and
talent scarcity



The gig economy



Ageing workforce
and new
demographic mix



Changing attitude
towards work

In 2023 there were eight workers for every two retirees. By 2050 there will only be one worker for every two retirees

8:2

20x

By 2030, the market for AI is predicted to grow twenty times

Every day brings new challenges to address - for workers AND employers



Workers surveyed across 27 countries in the past six years

118k

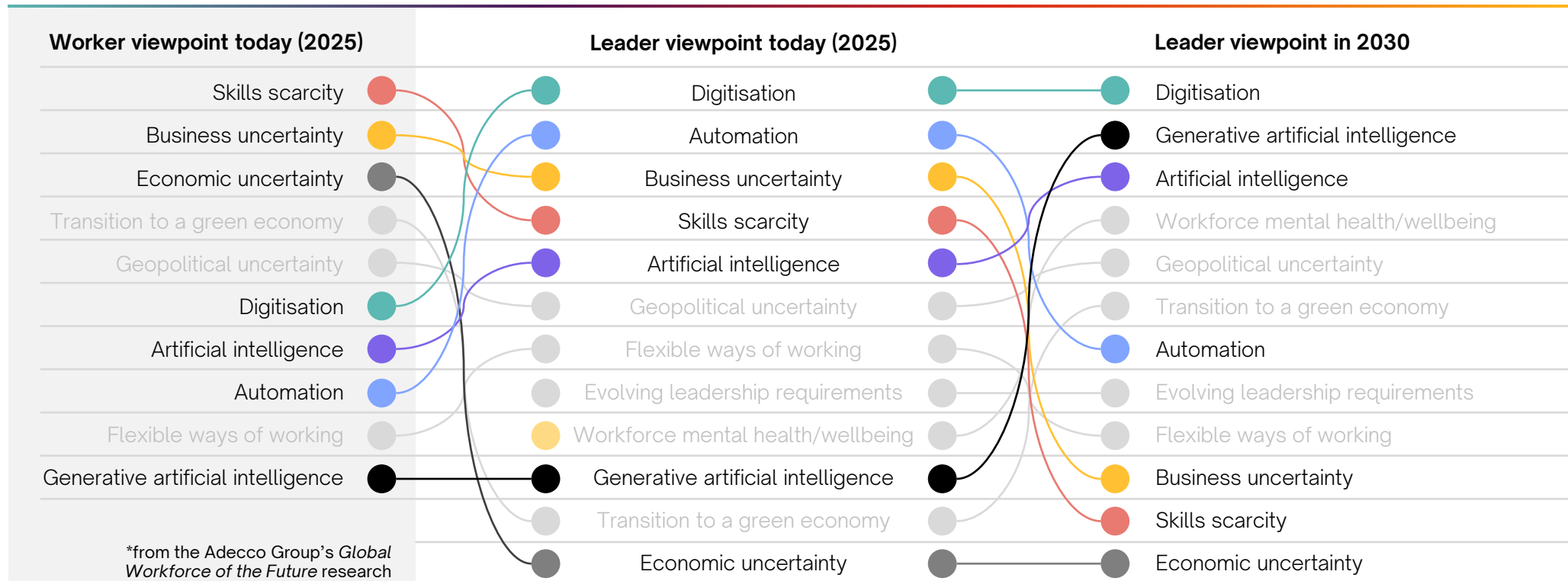
2k


C-Suite executives surveyed across nine countries and six industry groups in 2025

Technology will be the top influence over the next five years according to leaders, but workers disagree

According to 37,500 workers across 31 countries and 2000 C-suite executives across 13 countries

“Which of the following megatrends are having/will have the biggest impact on your company?”





Case studies: The impact of change

‘Skills Needs’ in the Automotive Sector 1/2

Between 2022 and 2035, automotive manufacturing is signalling a shift towards higher-skill requirements, influencing a decrease in mid-skilled roles—polarization in skill requirements

Key Challenges

Reactive workforce planning

Training trade-offs

Skills & cultural change

Co-ordination of workplace displacement

Uncertainty and inaction

Key Findings

- Higher demand for engineers, IT professionals, and managers
 - Lower demand for metal workers, clerks, assemblers
- Electric Vehicles (with simpler production processes) allow higher efficiency
 - Simultaneously reduce the need for certain manual/entry level roles
- Uneven regional impact of the automotive workforce transition
 - While overall employment change is modest (+1.2% to -0.6%), impacts vary sharply by region—declines are expected in southern Germany, Central Bohemia, West Slovakia and West Sweden, while northern Spain is projected to see workforce growth.

Sunrise skills: Digital platforms, Advanced analytics, Sustainability logistics, AI & machine learning in engineering

Sunset skills: Traditional sourcing, ERP-centric systems, Manual operations, Combustion engine designing

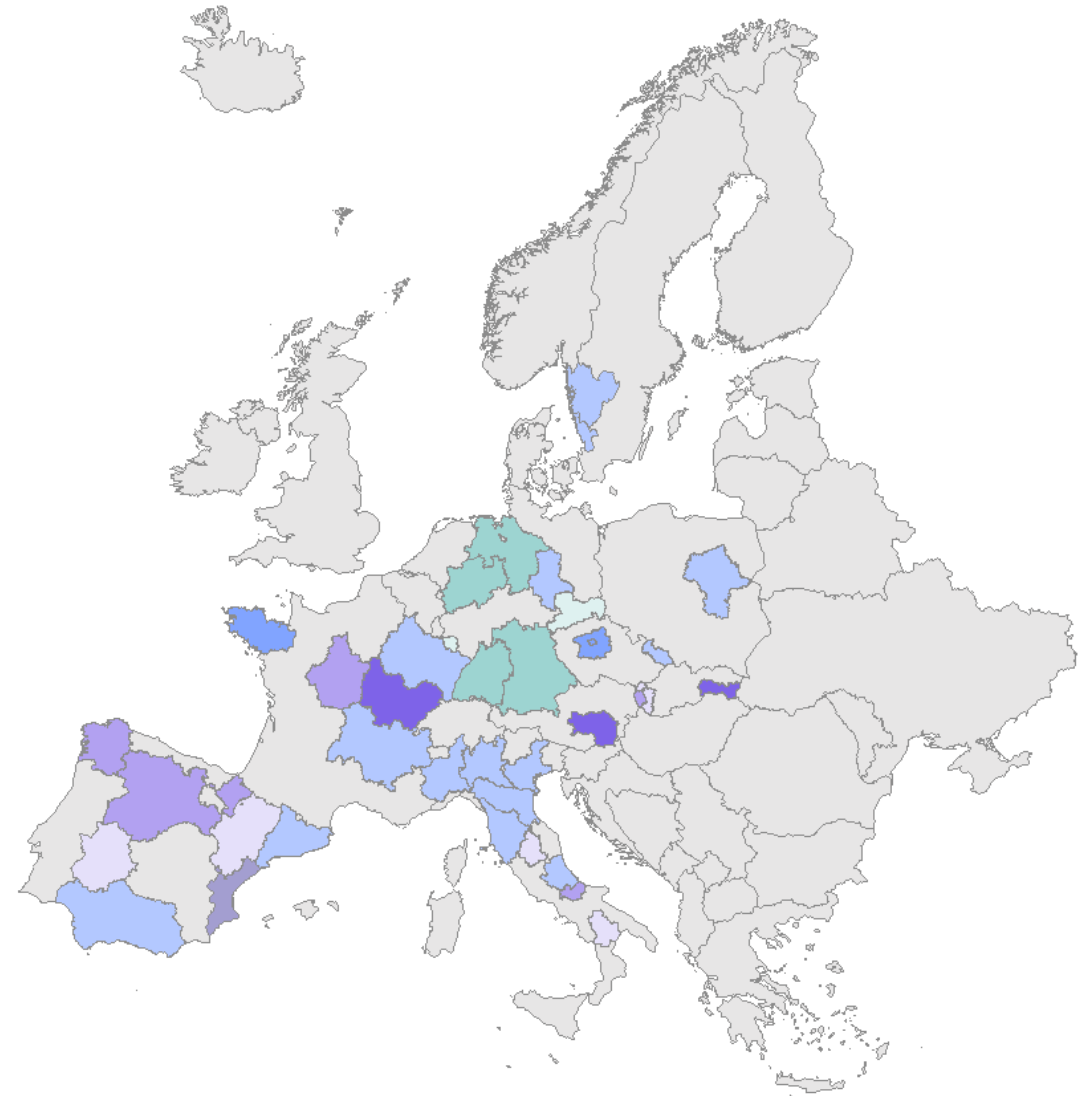
‘Skills Needs’ in the Automotive Sector 2/2

Prevailing (automotive) workforce challenges vary by region

- Workforce Training and Skill gaps
- Talent Retention
- Overall Activation & Employability
- Employability and Transition
- Workforce Training & Transition
- Mismatch & Talent Retention
- Labour Shortages
- Consolidating Automotive Capacity

Recommendations

- Strategic workforce planning
- Modular and flexible learning pathways
- Sector-wide collaboration
- Employer branding to attract talent
- Transition pathways for displaced workers
- Public-private employment service partnerships



Are Digital Platforms a New Form of Work or a New Way to Intermedate Work?

At the Adecco Group, we believe that platform Work is NOT a revolution; it is a way to intermedate workers and jobs. BUT it should still follow and respect existing rules and rights relating to workers.

Evidence

- Platform work: 0.2% to 5% of the labour force in High-Income countries; modest but still enduring
- Valuable opportunities for marginalized groups: women, migrants, disables workers, youth
- Flexibility is the leading reason, as 95% of workers value schedule flexibility
 - Need 25%+ income increase to tradeoff
- Broad reclassifications carry significant risks
 - Reduced work opportunities by 64% in Geneva (2020).

Policy Recommendations

- No “one-size-fits-all” initiatives
 - Must be:
 - jurisdiction specific
 - proportionally regulated
- Promote social innovation at the national level
 - Already happening (France, India, Chile, California)
- Tripartite social dialogue (Gov, corporate, social) is essential
 - Platform companies should engage with employer’s organisations & social partners

Wages are not always reflecting the need for a Green Transition

Adecco Group research shows: If we want the transition to succeed, we need to make job transitions more attractive, through “green” wages and more flexible labour markets

Key Data Points

- Green Jobs are NOT more competitive on wages (overall median Green Wage Gap is -0.46%);
- Switching between Green and Non-Green sectors in the same occupation impacts wages by an average of 16%
- Low Complexity Roles: Significant Green Wage Gap of -6%
- High Complexity Roles: significant Green Wage Premium of +22%
- EU countries perform worse than non-EU countries (AU, CA, IN, US, UK) on green wage premiums
- Highly specialized green jobs yield best premiums: Cleantech Manager +28%, Climate Sustainability Officer +32%

Policy Recommendations

- Green skills value must be reflected in wages
- Fiscal incentives may be needed to make green jobs attractive
- Re- and upskilling efforts should target those who can benefit the most
- Labor market information on Green Skills, Jobs, and Sectors must improve



The State of Labour Market regulation

OECD Evidence: *Labor Market Flexibility is Declining*

Key OECD Findings (2019-2025)

- Employment protection has **tightened, not loosened**.
 - OECD EPL indicators show *increasing regulation of dismissals and temporary contracts* across most member countries, reversing the post-2008 trend of liberalisation.
- Temporary work is **becoming less flexible**.
 - Since COVID-19, most EPL reforms *focused on stricter limits on temporary contracts*, including caps on renewals and shorter maximum durations, reducing employers' ability to adjust labour quickly.
- **Fewer** low-cost termination options.
 - In many OECD countries, the ability to terminate jobs “at virtually no cost” via successive short-term contracts has been *reduced as protections for temporary workers strengthened*.
- Convergence **toward stricter** systems.
 - Even traditionally flexible, common-law countries remain in the *lower half of EPL strictness rankings*, but the overall OECD average EPL index has risen, indicating declining aggregate flexibility.

OECD data shows that labor markets are becoming less flexible by design, as governments prioritize job security and the reduction of labor market dualism over ease of hiring and firing.

Conclusion



The role of Public - Private Cooperation between Employment Services

21/28

European PES collaborate with PrES

10.000

Refugees integrated by Adecco Germany

86%

made better use of skilling programs by receiving **career guidance** prior to participating.

70%

Success rate for placements by Adecco Inclusion France (vs 55% PES)

27%

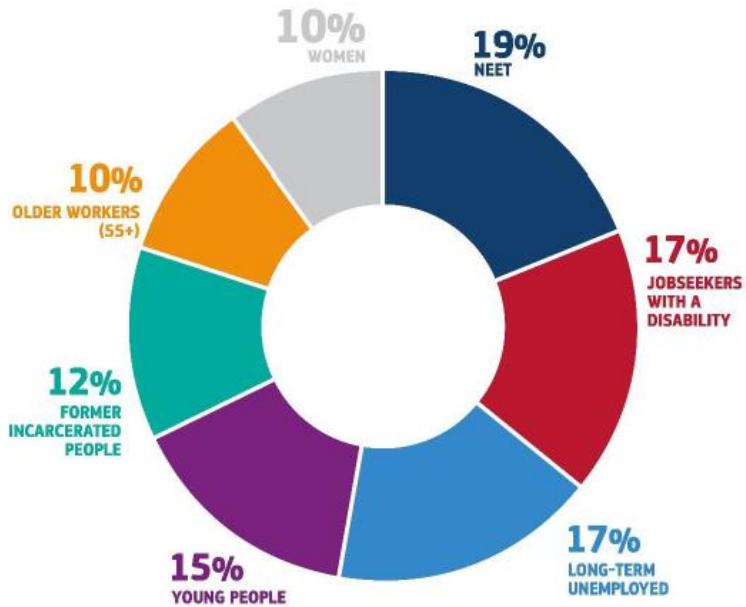
Agency workers into open-ended contracts (2023)

Key Evidence

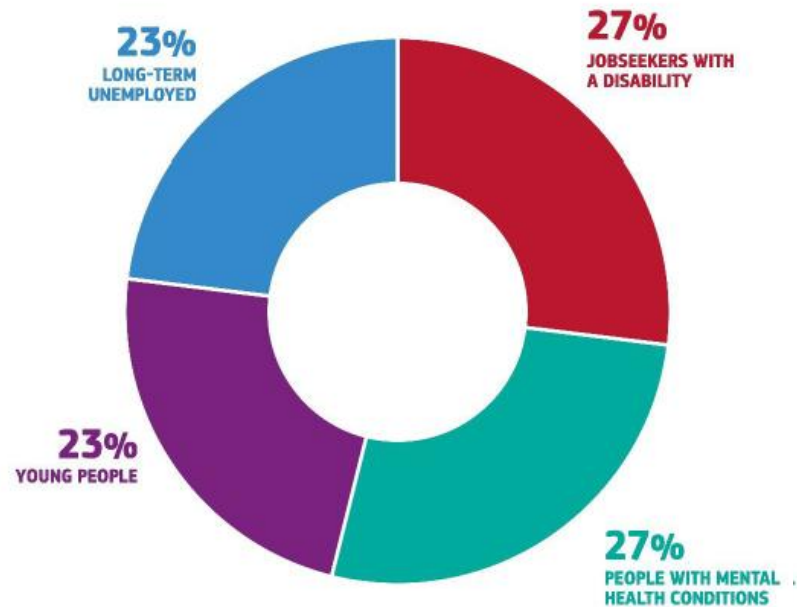
- **La Hulpe Declaration** (April 2024): “Private employment are essential for meeting the needs of jobseekers and employers...” and “also have a role to play” alongside PES.
- **EU commission:** ”Strengthen collaboration of PrES with PES to improve job matching across the EU”
- **PES Network Survey:** “PrES are mainly used to support services to vulnerable groups”

PES Network Survey: *“PrES are mainly used to support services to vulnerable groups”*

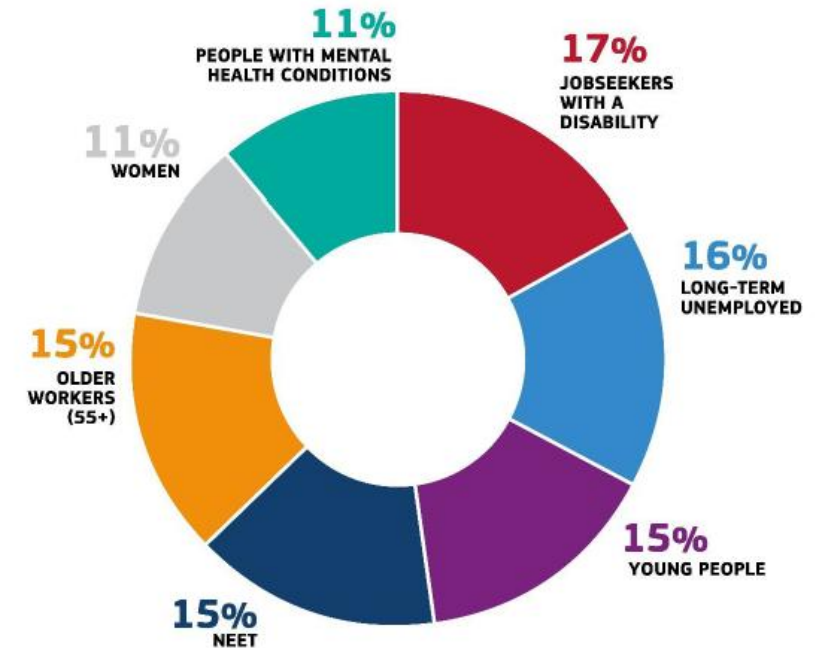
Main target groups for career guidance delivered by PrES



Main target groups for employability training delivered by PrES



Main target groups for support with CVs and job interviews delivered by PrES



What needs to happen?

Invest in agile and fair labour markets

- Reflect changing work patterns: how / when / where to work?
- Level playing field for flexible labour
- Social protection for all workers regardless their form of work

Grow the talent pool

- Active labour market policies
- Invest in skills – Set a National Skills Target of 0,5% GDP
- Promote talent mobility
- Unlock underrepresented groups by making work fit people's life needs

Act together

- *HR service companies stand ready to partner with governments and social partners to deliver skills, mobility and inclusion.*

Thank you

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