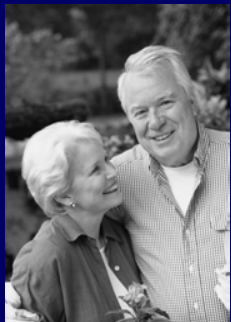


Employee ***A***ssistance ***P***rograms

Paris, 19th April 2002

DO YOU KNOW THAT ?



- **The most frequent requests from European employees are:**

to have better work/life balance.

to have additional time in private life .

(Hewitt study, March 2002)

- **In the UK**

20 % of employees are caring for elderly relative(s).

40% of working women have dependent children.

- **Stress costs € 20 Billion to European organizations and between € 200 and 300 Billion to US organisations.**

(International Labour Office)

- **In the UK a teacher has received £ 250 000 for excess of stress.**

(Research on work-related stress, European Agency for Safety and Health at work, 2000)

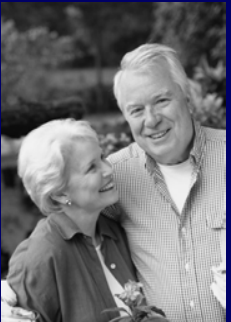
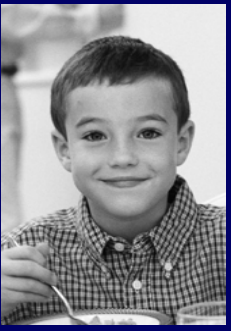
- **“It is clear that stress-related illness is a major cause for concern in terms of its impact on both individuals lives and the productivity of organizations and countries”**

(European agency for Safety and Health at Work, Bilbao, 2000 Research)

Market Drivers

EAP Services

Our Strategy



■ MARKET DRIVERS

Employees expectations

Organisations objectives

EAP : a win / win solution

■ EAP SERVICES

A full integrated offer

Within Accor Services skills

■ OUR STRATEGY IN EAP

An international growing market

Our objectives



Employees expectations

Demographic drivers

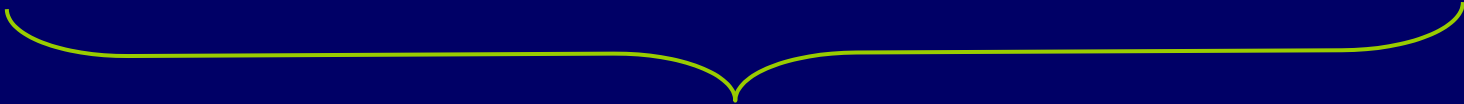
- General ageing of the population

Lifestyle drivers

- Single-parental family
- Bi-active couple
- More stress and depression diseases

Labour drivers

- Flexibility of work organisations
- War of talents
- New technologies

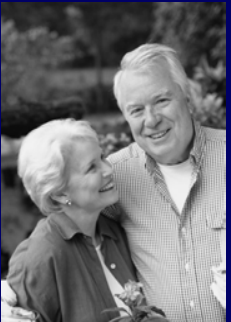


Employees need tools to balance their personal and professional life

Market Drivers

EAP Services

Our Strategy



Organisations objectives

Employer of choice

HR Marketing

“Employer branding”
Attract and retain the best talents.

Ethical

“Social responsibility” of employer, “social rating” of firms.

Profitability

Financial

Reduction in absenteeism and turn-over related costs.

Risk Management

Legal Compliance

EU standards on prevention (March,13th and November, 28 2000).

Local standards on health & safety (physical & mental).

Legal Risk Management

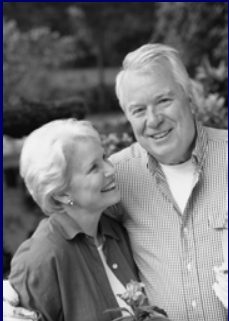
Prevent legal claims from stressed and mentally sick employees.

Organisations need HR tools to deal with these issues

Market Drivers

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Our Strategy



EAP : a win / win solution

A **management tool** for the companies to improve organisations performance...

... **adressing** information, services and psychological **needs of employees.**

ACCOR services

Market Drivers

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A full integrated offer



Childcare services
 (Nannies, Educational help,
 School issues, Camps...)

Eldercare services
 (Facilities/In-home, Social Services,
 Medicare...)

Housing
 (Housekeeper, Repairs,
 Refurbishment...)

On site services
 (Concierge, Dry cleaning,
 Massage...)

Leisure
 (Restaurants, Cultural events,
 Travel, Hotels, Taxis...)

Childcare information
 (Maternity, Adoption, Education...)

Eldercare information
 (Retirement..)

**Financial and legal
 information and advice**

Other daily life advice
 (Administrative advice, Housing,
 Relocation, Leisure...)

**PSYCHOLOGICAL
 SUPPORT**

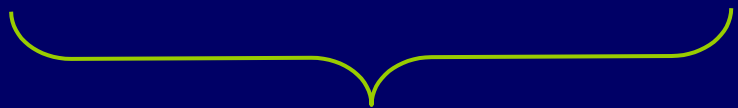
Stress, anxiety, Depression

Addictions
 (Drugs, Alcohol...)

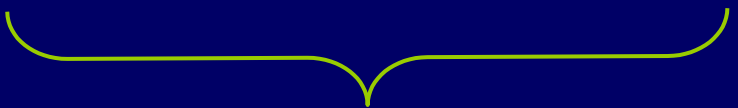
Relationships
 (Family, Co-workers...)

Employment
 (Career, Change, Restructuring...)

Critical Incident
 (Violence in the work-place,
 Traumatic incidents...)



Resource and Referral Programs



Counselling Programs

ACCOR services

Within Accor Services skills

Market Drivers

EAP Services

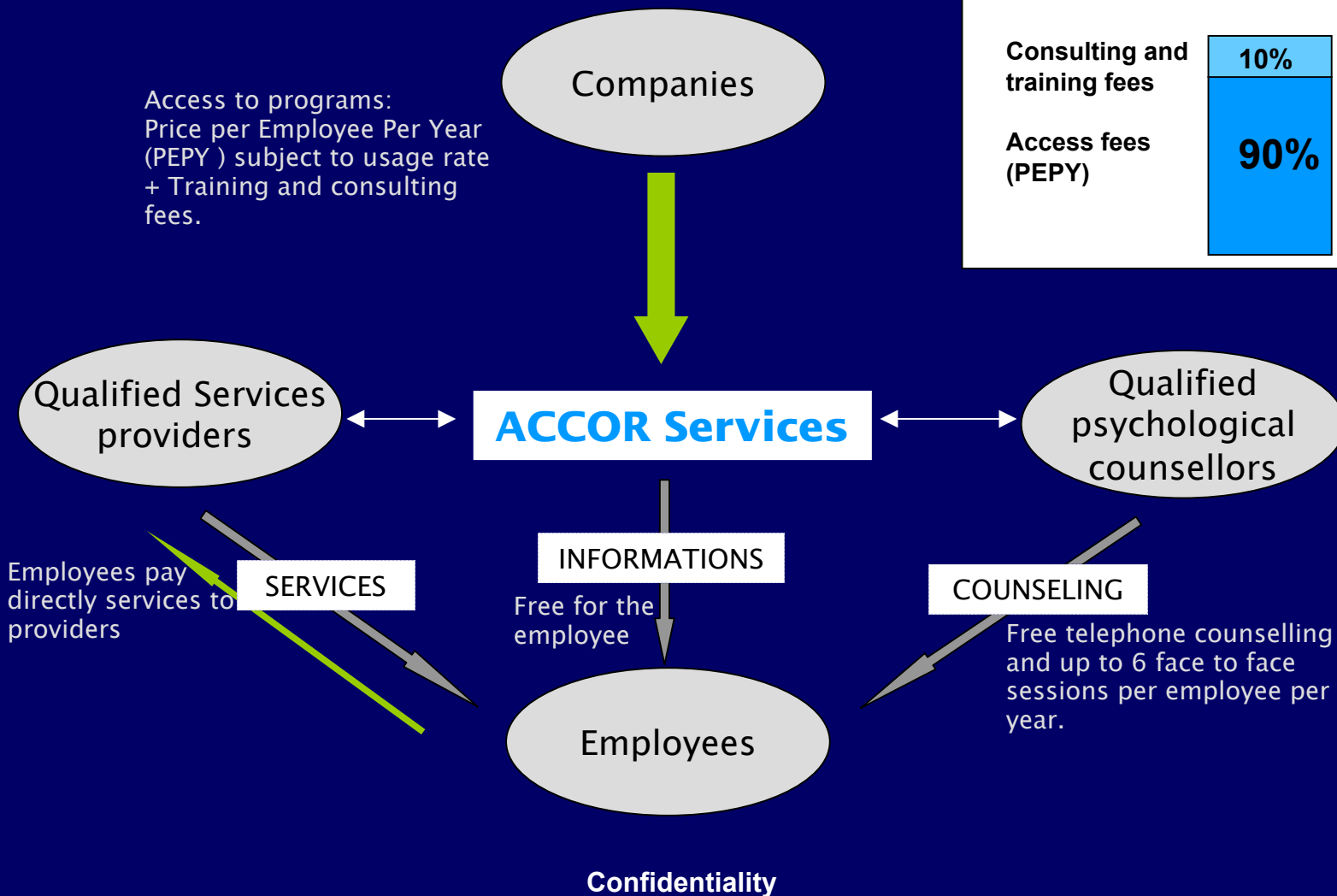
Our Strategy



Access to programs:
Price per Employee Per Year (PEPY) subject to usage rate + Training and consulting fees.

Breakdown of revenues

Consulting and training fees	10%
Access fees (PEPY)	90%



ACCOR services

Market Drivers

EAP Services

Our Strategy



MARKET DRIVERS

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OUR STRATEGY IN EAP

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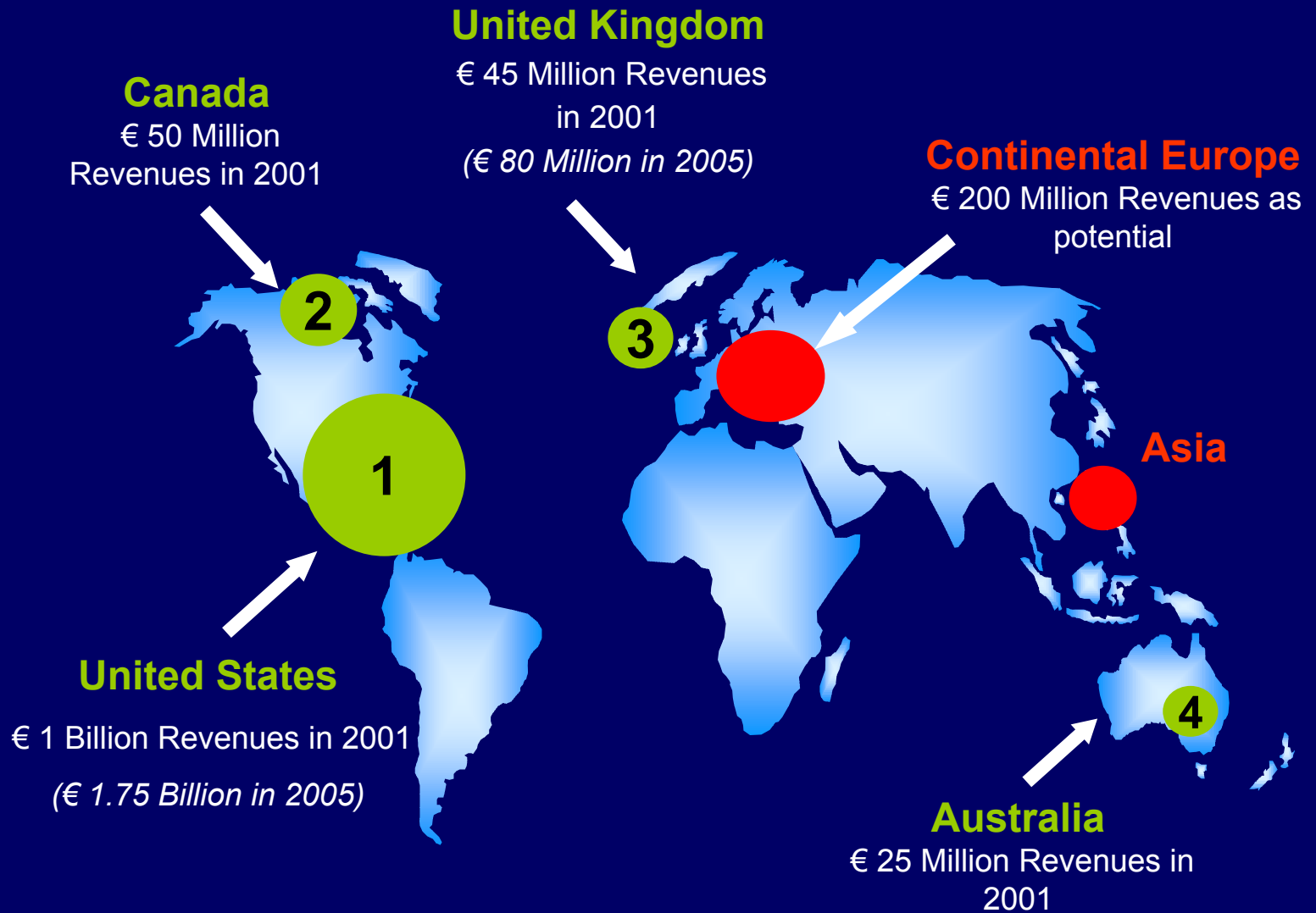
Market Drivers

EAP Services

Our Strategy



An international growing market



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Market Drivers

EAP Services

Our Strategy

An international growing market



EAP PLAYERS	Total revenues (M €)	International presence
MAGELLAN	180	United States
CERIDAN	160	United States / United Kingdom
UNITED BEHAVIORAL HEALTH	70	United States
ACCOR	20	United Kingdom / United States France / Sweden
ICAS	14	United Kingdom / Spain / Germany / Switzerland / Scandinavia
OSA/DT	12	Australia

Average RGO of EAP players: 15% à 20%

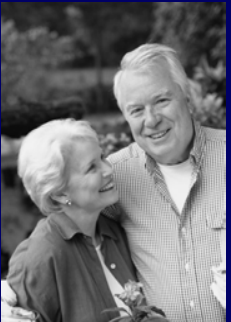
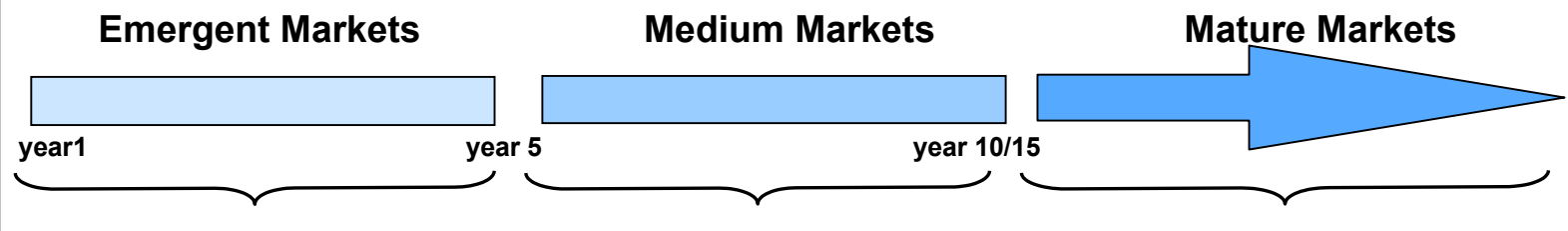
ACCOR services

Market Drivers

EAP Services

Our Strategy

Our Objectives



Continental Europe

Average annual expected growth rate
67%

Objectives :
Entering into new countries subject to market drivers.

Continental Europe

Average annual expected growth rate
28%

Objectives :
Consolidate our position.

US/UK

Average annual expected growth rate
15%

Objectives :
Increase our added value in a full integrated offer.

Becoming leader in Europe with a full integrated offer (organic or external growth)

ACCOR services

We already keep pace with employees lifestyle of....



Accor



Aventis Pharma



Citibank



Eurotunnel



General Motors



Glaxo



Yahoo Europe



PepsiCo



Schering Plough



Schlumberger



Sema



William Mercer

and others...