

Human Capital



Some trends in HR Policies and Practices – Q1-Q3 2011

Preliminary data of Express-Survey #2

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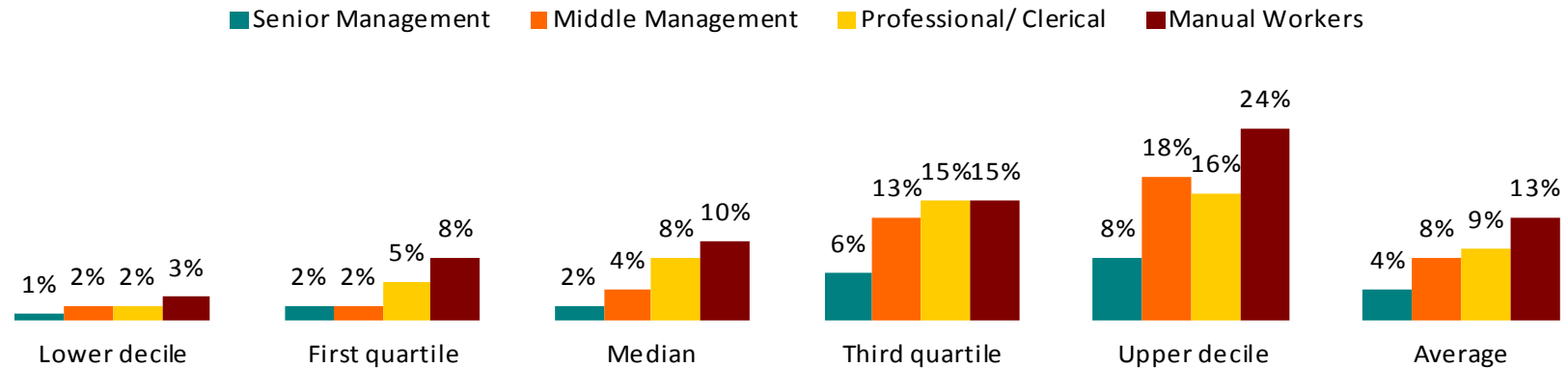


Changes in recruitment/downsizing plans

Actual changes in recruitment/downsizing plans – Q2 2011

Actual changes in the number of staff, Q2 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Increase the number of staff	25%	8%	15%	34%	12%
<i>Actual increase in Q2 2011, %</i>		4%	8%	9%	13%
Keep the number of staff stable	65%	92%	80%	58%	82%
Reduce the number of staff	10%	-	5%	8%	6%
<i>Actual personnel cut in Q2 2011, %</i>		-	2%	4%	23%

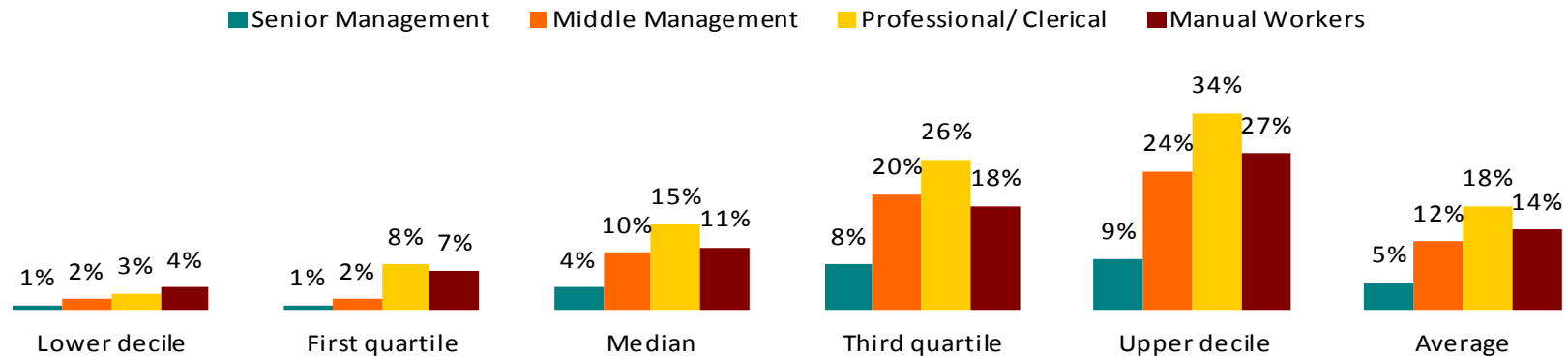
Actual increase in Q2 2011, %



Actual changes in recruitment/downsizing plans – Q1-Q2 2011

Actual changes in the number of staff, Q1-Q2 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Increase the number of staff	28%	11%	24%	34%	18%
<i>Actual increase in Q1-Q2 2011, %</i>		5%	12%	18%	14%
Keep the number of staff stable	60%	89%	68%	53%	70%
Reduce the number of staff	12%	-	8%	13%	12%
<i>Actual personnel cut in Q1-Q2 2011, %</i>		-	3%	6%	19%

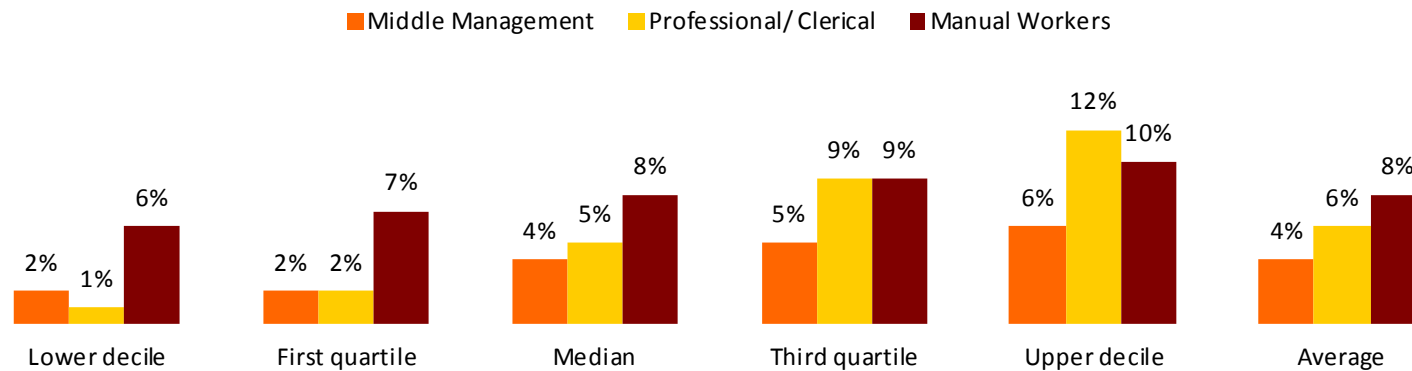
Actual increase in Q1-Q2 2011, %



Planned changes in recruitment/downsizing plans for Q3 2011

Planned changes in the number of staff, Q3 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Increase the number of staff	34%	3%	31%	53%	9%
<i>Planned increase in Q3 2011, %</i>		2%	4%	6%	8%
Keep the number of staff stable	63%	94%	69%	47%	88%
Reduce the number of staff	3%	3%	-	-	3%
<i>Planned personnel cut in Q3 2011, %</i>		N/A	-	-	N/A

Planned increase for Q3 2011, %





Changes in salary arrangements

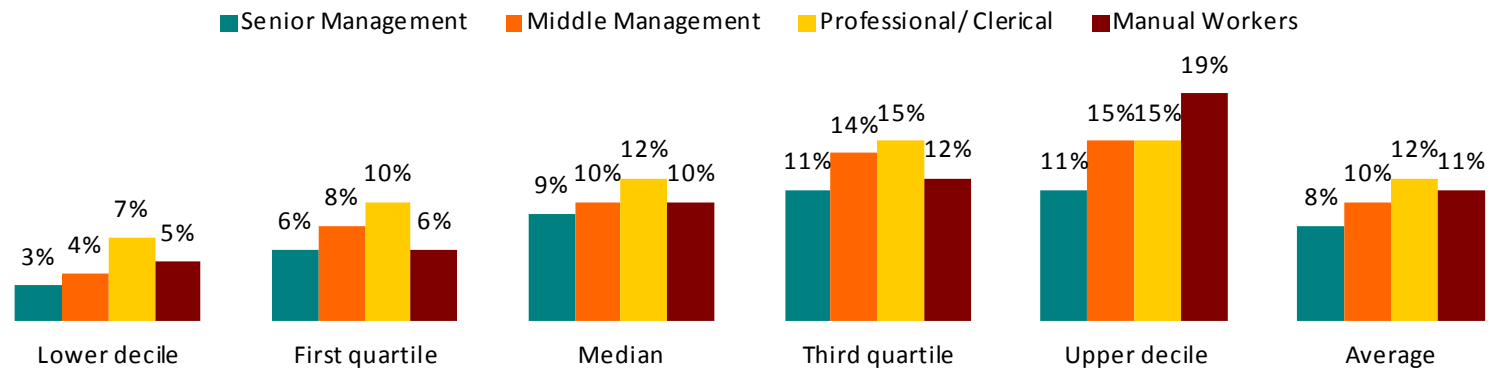
Actual salary changes – Q2 2011

Salary increase of 10-11% in Q2 2011 was planned by 38% of participating companies.

In Q2 2011 43% of participants increased salary levels, on average, by 8-12% depending on the category of employees.

Actual salary changes, Q2 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Salary increased	43%	36%	46%	47%	38%
<i>% of salary increase, Q2 2011</i>		8%	10%	12%	11%
Salary levels did not change	54%	64%	54%	50%	62%
Salary decreased	3%	-	-	3%	-
<i>% of salary decrease, Q2 2011</i>		-	-	N/A	-

Actual salary increase in Q2 2011, %

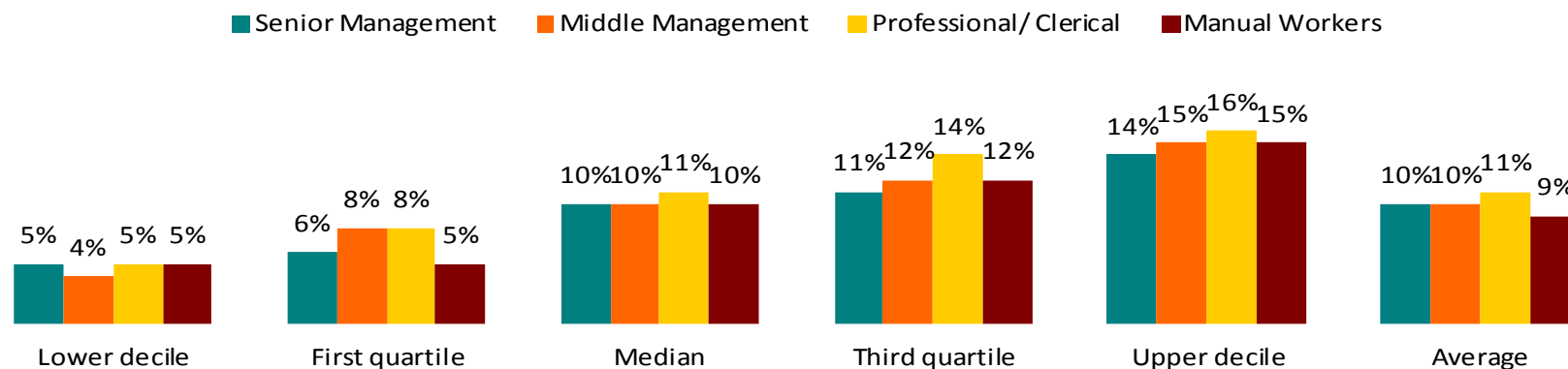


Actual salary changes – Q1-Q2 2011

In the first half of 2011 about 67% of companies increased salary levels, on average, by 9-11% depending on the category of employees

Actual salary changes, Q1-Q2 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Salary increased	67%	66%	74%	76%	65%
<i>% of salary increase, Q1-Q2 2011</i>		10%	10%	11%	9%
Salary levels did not change	30%	34%	23%	21%	35%
Salary decreased	3%	-	3%	3%	-
<i>% of salary decrease, Q1-Q2 2011</i>		-	N/A	N/A	-

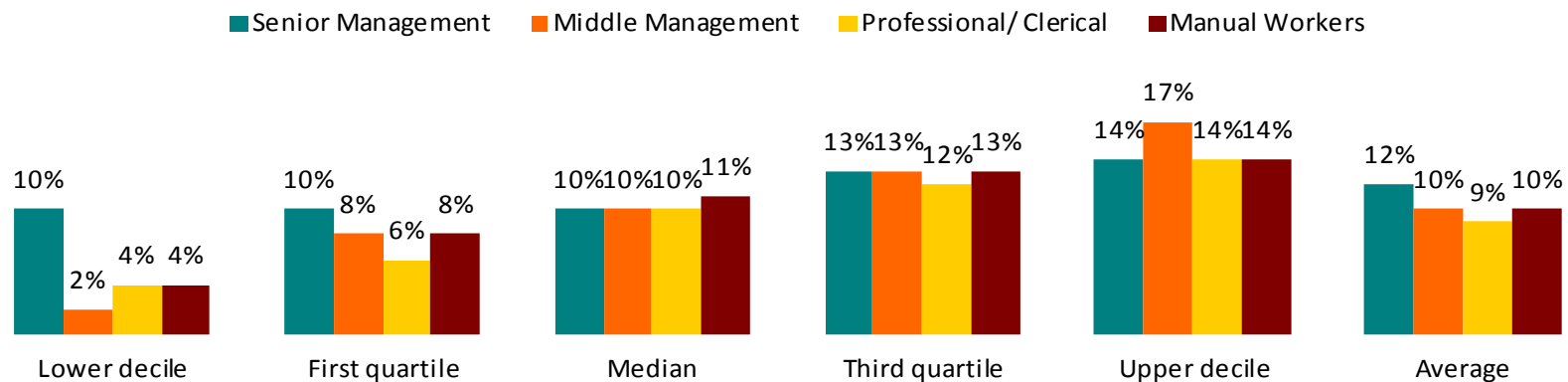
Actual salary increase in Q1-Q2 2011, %



Planned salary changes for Q3 2011

Planned salary changes, Q3 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Salary increase is planned	25%	17%	22%	21%	15%
<i>% of salary increase, Q3 2011</i>		12%	10%	9%	10%
Salary levels will not change	73%	83%	75%	76%	85%
Salary decrease is planned	2%	-	3%	3%	-
<i>% of salary decrease, Q3 2011</i>		-	N/A	N/A	-

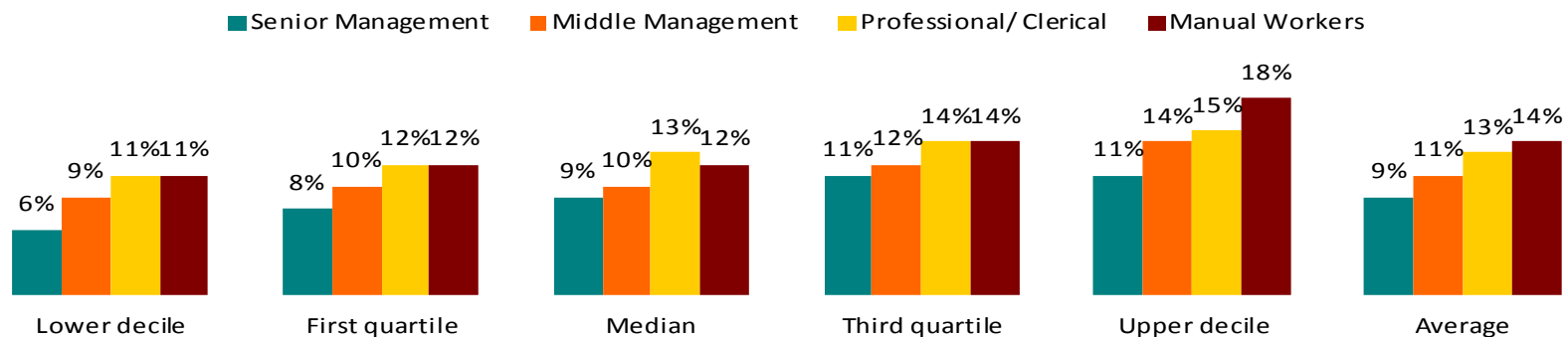
Planned salary increase, Q3 2011, %



Actual salary changes in Q2 2011 - FMCG companies

Actual salary changes, Q2 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Salary increased	45%	44%	50%	50%	40%
<i>% of salary increase, Q2 2011</i>		9%	11%	13%	14%
Salary levels did not change	55%	56%	50%	50%	60%
Salary decreased	-	-	-	-	-

Actual salary increase in Q2 2011, %

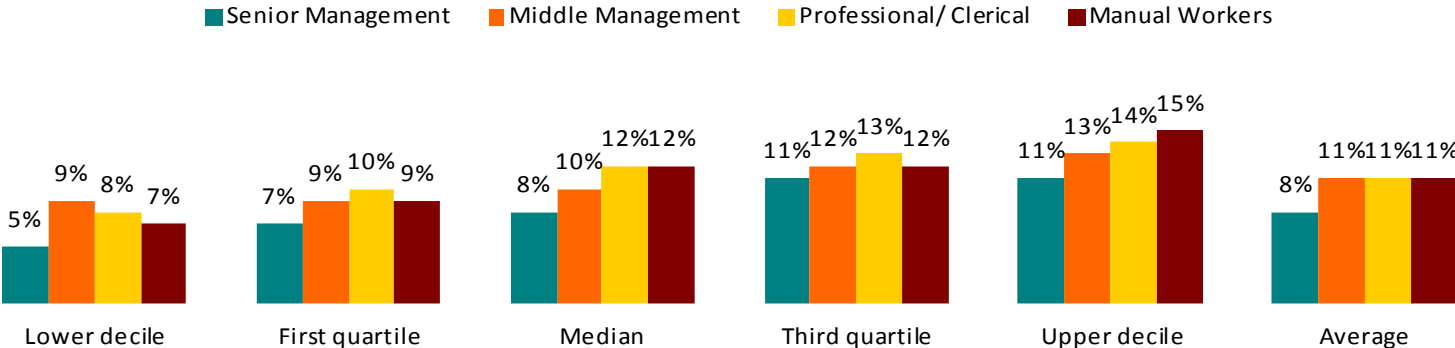


Actual salary changes in Q1-Q2 2011

FMCG companies

Actual salary changes, Q1-Q2 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Salary increased	80%	78%	80%	80%	70%
<i>% of salary increase, Q1-Q2 2011</i>		8%	11%	11%	11%
Salary levels did not change	20%	22%	20%	20%	30%
Salary decreased	-	-	-	-	-

Actual increase in Q1-Q2 2011, %



Planned salary changes for Q3 2011 – FMCG companies

Planned salary changes, Q3 2011	% of companies	Senior Management	Middle Management	Professional/ Clerical	Manual Workers
Salary increase is planned	27%	13%	30%	20%	20%
Salary levels will not change	73%	87%	70%	80%	80%
Salary decrease is planned	-	-	-	-	-

Questions?

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Thank you for attention!