

» HR Climate Index Central and Eastern Europe 2011

The economy of HR work



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HR in Central and Eastern Europe 2011 – Under the Banner of Recovery

The “economy” of HR work in 2011 in most Central and Eastern European countries will take place in a period of continuing economic recovery – and consequently, it will face increasing demands to ensure the supply of personnel resources.

In sum, the economic outlook for most of the countries participating in this study is positive: About two thirds anticipate growing sales and significantly higher profitability. Above all, almost a third of the Eastern European respondents expect strongly increasing sales, with particularly obvious increases in Russia. Furthermore, most of the participants anticipate a growing workforce – especially in Central Europe. Compared to 2010, the outlook for economic data is altogether even more promising.

These expectations produce a specific set of new priorities for HR work: In view of the anticipated increase in workforce numbers, recruitment will be the most important theme in both regions. However, there is a wider spread among the other top priorities identified: While in Germany/Austria/Switzerland, the improvement in leadership and management quality and employer attractiveness will be dominant in 2011, the Eastern European participants report a stronger focus on performance management / MbO as well as on compensation and benefits.

When breaking down the results by sectors of industry, it becomes apparent that the financial sector is still coping with the aftershocks of the crisis in 2009, especially in Central Europe: By contrast to other sectors, the financial industry concentrates on the topics of compensation and benefits as well as change management. Interestingly, while the Eastern Europe financial sector also differs in its priorities from the other industries in the region, it presents a distinctly different focus than its counterpart in Central Europe. The headline topic for Eastern Europe’s financial sector increasingly revolves around leadership and management quality and talent management.

Given the mostly very positive expectations about sales, profitability, and – in particular – workforce numbers, the results of this study suggest that the demands HR has to face in terms of recruitment, development, and retention will intensify in 2011. As core processes, these tasks represent – in particular against the background of the demographic change in many European and in particular Eastern European countries – the biggest challenge and, by extension, the most important contribution of HR to corporate growth. However, in sum, the findings imply rather limited expectations concerning the resources of HR and its strategic impact:

- Although respondents from Russia and Hungary in particular do expect some positive developments in their HR staff, 70% of respondents in Central and 80% in Eastern Europe await no changes in their HR headcount. Furthermore, almost half of the participants in both regions expect unchanged HR Budgets.
- Half of participants in both regions of Europe report a rather weak perception of HR as a business partner among management, and about 60% in both regions report an at most 40% involvement of HR in strategic corporate projects and initiatives.
- Overall, the perception of HR is weaker in Eastern Europe than in Central Europe.

This stagnation in HR resources and the lack of integration of HR in the organizational strategy raise some doubts concerning HR’s ability to meet the increasing demands to support business growth and deliver HR Excellence.

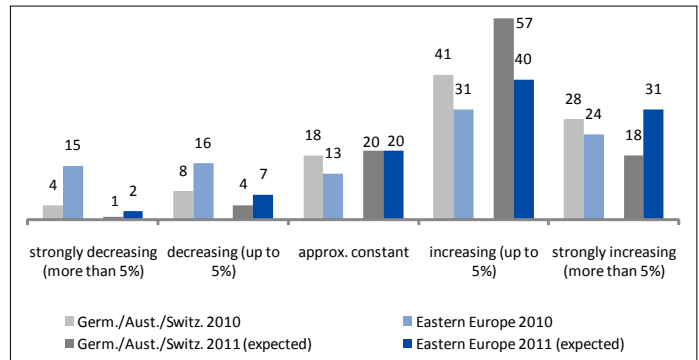
Berlin, March 2011

Paul Kötter

The State of Businesses

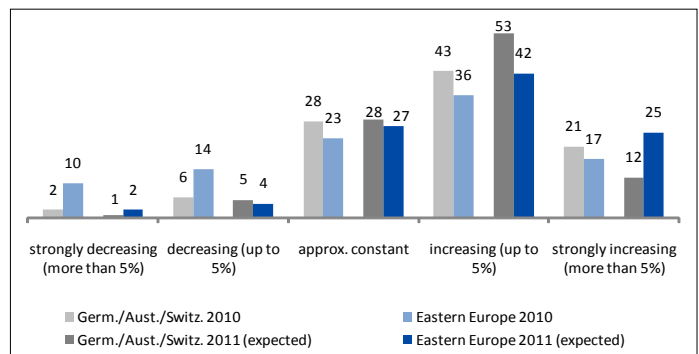
Sales

Sales increased in both regions in a majority of cases in 2010. This trend is continued and reinforced in 2011 – although with some noticeable differences: About 70-75% of the participants in both regions expect increasing sales. However, the number of Eastern European organizations expecting growth rates of more than 5% is 13 percentage points higher than in Germany, Austria, and Switzerland.



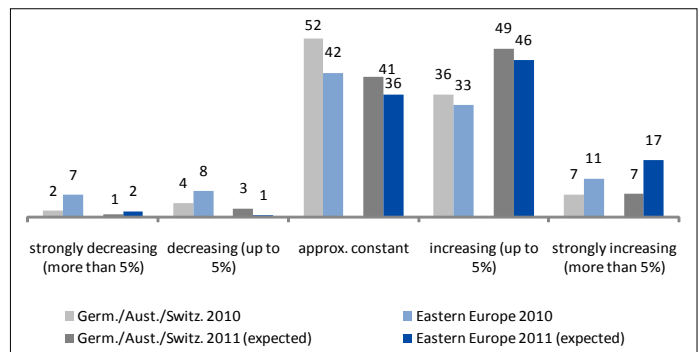
Profitability

Compared to 2010, profitability is on an upward trend: In both regions, 65% resp. 67% of respondents anticipate growing profits, while the intensity of the expected growth is again significantly higher in Eastern Europe.



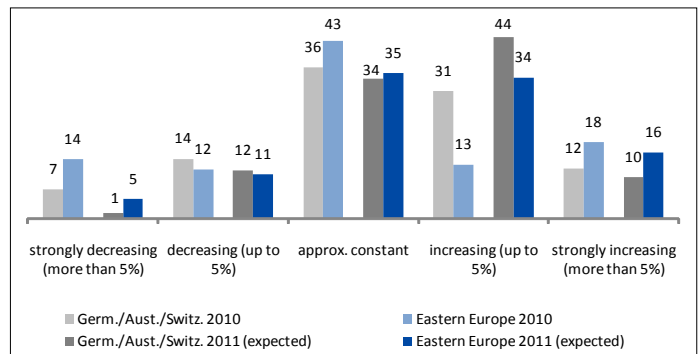
Market Share

The positive trend above is reflected in the expectations of the respondents about their market share. More than half of participants expect market share to increase – compared to 2010, this is an increase of approximately 14 resp. 19 percentage points. Again compared to Germany, Austria and Switzerland, more organizations in Eastern Europe expect this increase to be higher than 5%.



Workforce

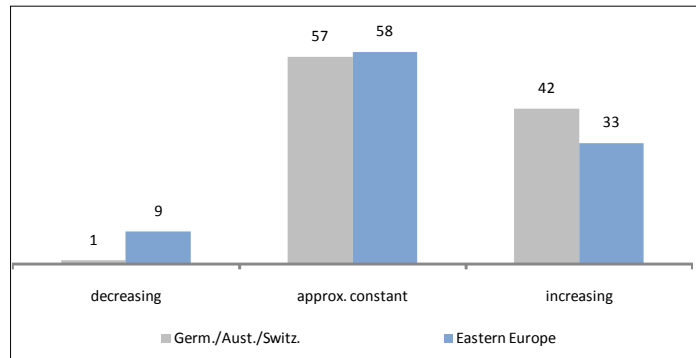
While more organizations in Germany, Austria and Switzerland than in Eastern Europe increased their staff in 2010, every second participant in both regions anticipates (strong) growth in their personnel capacities for 2011. However, these results seem not to mirror the expectations concerning the above facts, since more organizations in Germany, Austria and Switzerland than in Eastern Europe prepare for an increase in their staff numbers.



Developments within HR

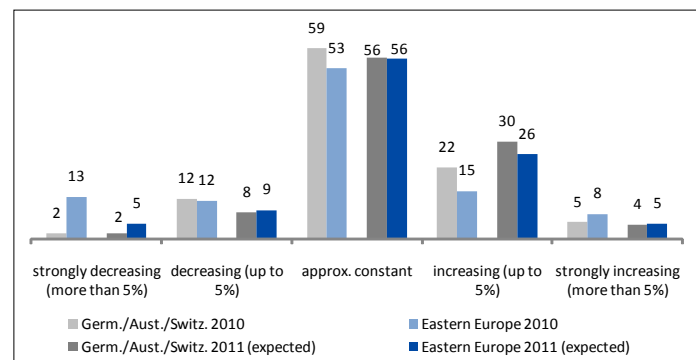
Impact of HR

The majority of the respondents in both areas anticipate the impact of HR within their company to remain stable. 42% resp. 33% expect an even increasing relevance for 2011. However, nearly 10% of the participants in Eastern Europe foresee a decrease in this influence.



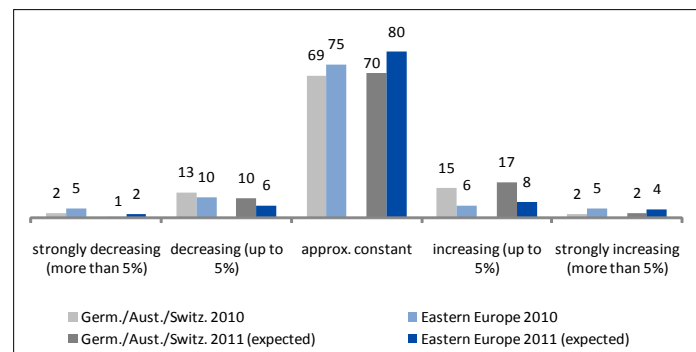
HR Budget

Only few differences occur between Germany, Austria and Switzerland and Eastern Europe with regard to the HR Budget: While the amount of respondents expecting an increasing budget grows by approximately 10 percentage points compared to 2010, the majority anticipates unchanged financial resources of HR for 2011.



HR Headcount

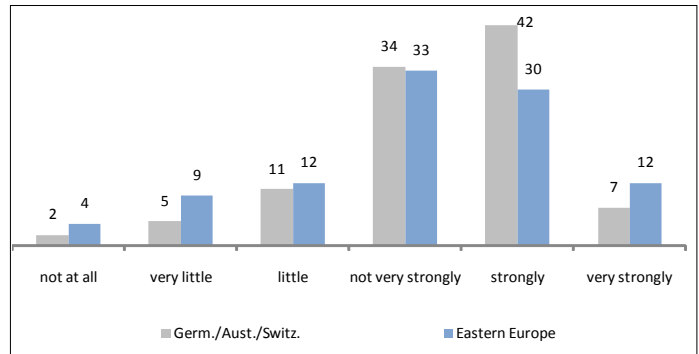
The relative stagnation in HR resources becomes more obvious in the estimations of the participants about the personnel in HR. Nearly unaltered since the previous year, 70% resp. 80 % expect an unchanged employee pool in HR for 2011. Similar to the estimations regarding the development of the workforce in general, these results do not reflect the positive expectations in sales or profitability – especially in Eastern Europe.



Positioning of HR

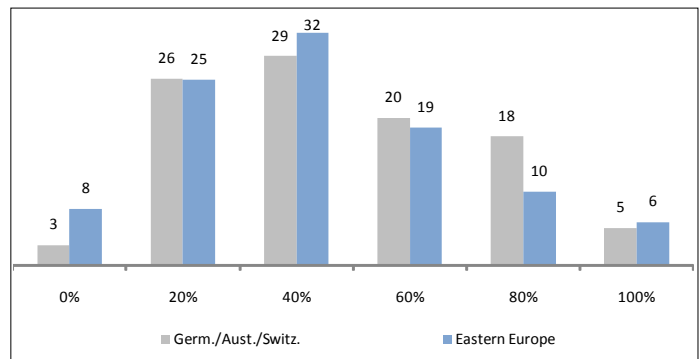
HR as Business Partner

The reported perception of HR as a business partner tends to be split in both regions. However, on closer inspection, it becomes obvious that in Eastern Europe approximately 60% describe the perception of HR as a business partner by management as rather weak – i.e. nearly 10 percentage points higher than in Germany, Austria, and Switzerland.



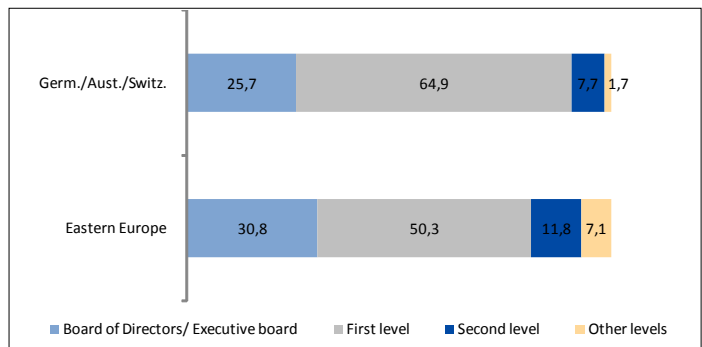
Involvement of HR in Strategic Projects and Initiatives

This split result above is further mirrored by the fact that the majority of respondents in both regions describe the involvement of HR in strategic aspects as rather low. Approximately 60% in Germany, Austria, and Switzerland as well as in Eastern Europe rank the inclusion of HR in strategic projects and initiatives at 40% or less.



Line Management of HR

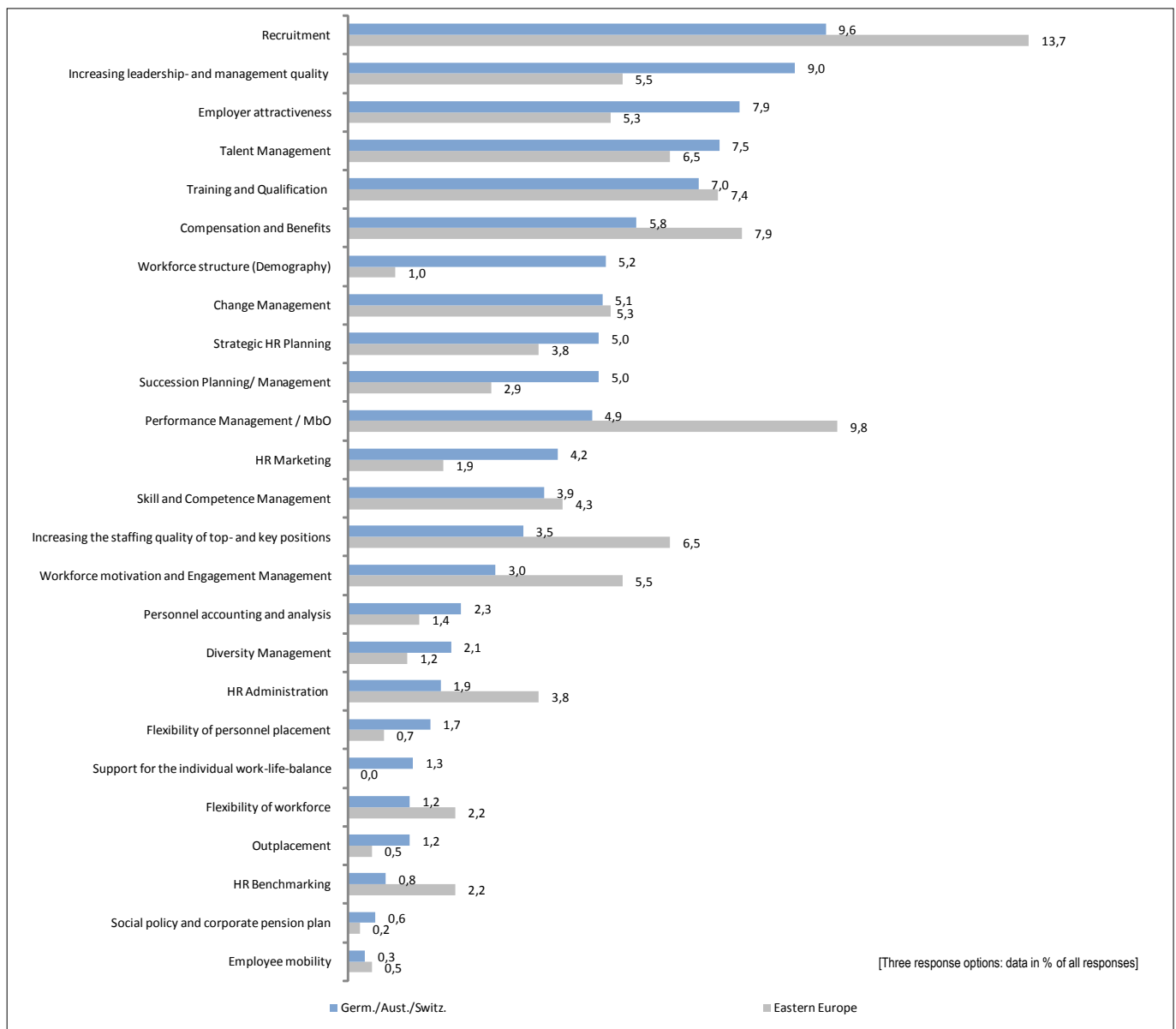
In Germany, Austria, and Switzerland, the HR department is represented at the first two management levels in more than nine out of ten cases. Although generally similar to this result, the number of respondents from Eastern Europe who place HR at the second level or another level is approximately 10 percentage points higher than in the Germany, Austria, and Switzerland region.



Priorities of HR in 2011

Priorities of HR in 2011 and a Comparison to Previous Years

Regarding priorities, the respondents in Germany, Austria, and Switzerland named recruitment, an increase in leadership and management quality, and employer attractiveness as particularly dominant fields for HR in 2011. In Eastern Europe, the respondents expect a greater focus on recruitment, performance management / MbO, and compensation and benefits. The biggest differences between the two regions occur in the greater dominance of the topics of performance management / MbO, recruitment, increasing the staffing quality of top and key positions, and workforce motivation and engagement management.

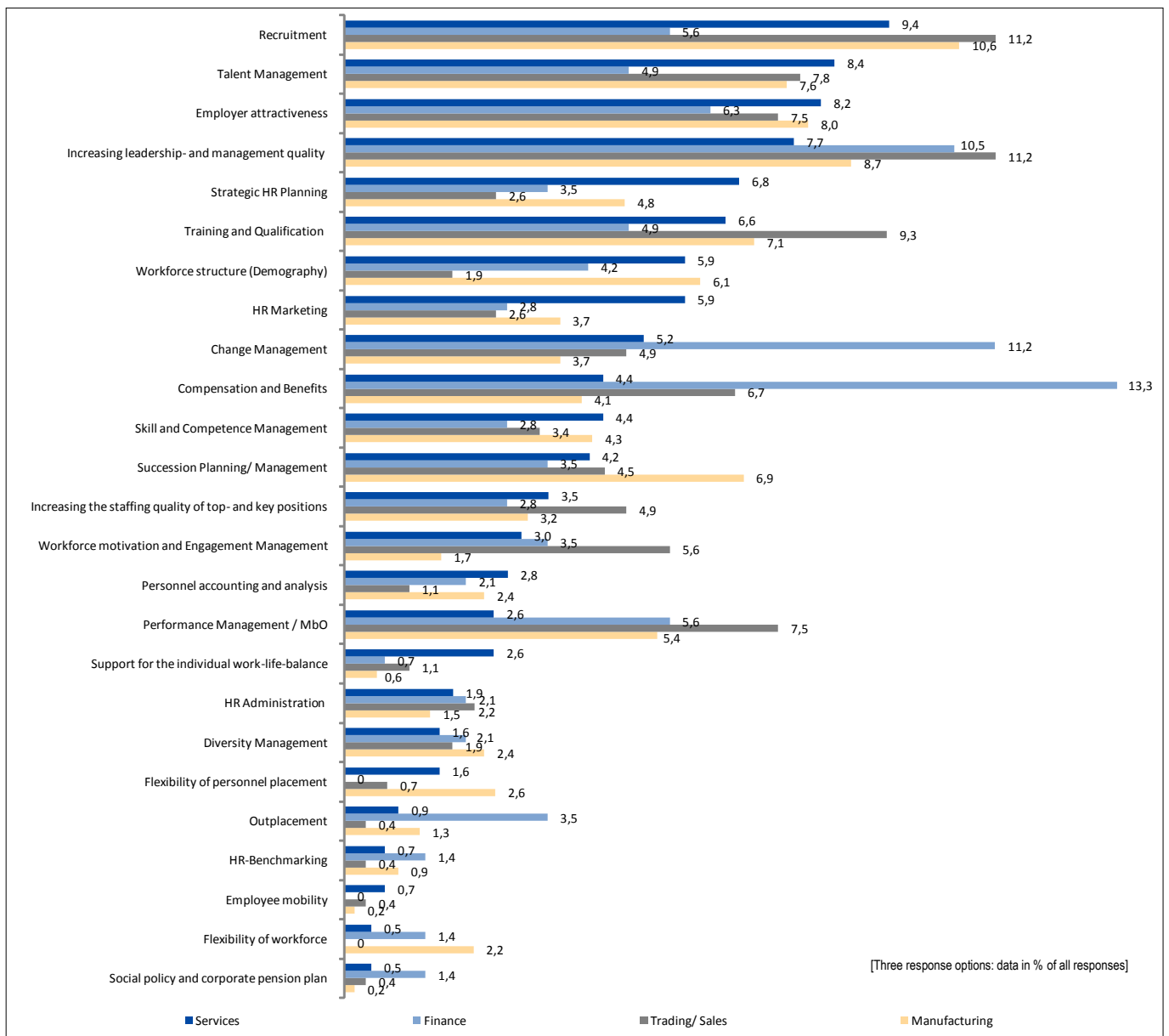


Priorities of HR in 2011 – Comparing Industries

Germany, Austria, and Switzerland

With regard to HR priorities, comparing the results between key sectors of the industry produces the following picture:

- While three out of four sectors have recruitment as the headline topic for HR for 2011, the respondents from the financial sector place the focus of their industry particularly on compensation and benefits, change management, and increasing leadership and management quality.
- Besides recruitment, the services sector will place the emphasis on talent management and employer attractiveness.
- Both the trade / sales and the manufacturing sector name a need for action not just in recruitment, but also in the improvement of leadership and management quality. However, participants of the trade / sales industry see training and qualification as a third important topic, while respondents from the manufacturing sector focus more on employer attractiveness.

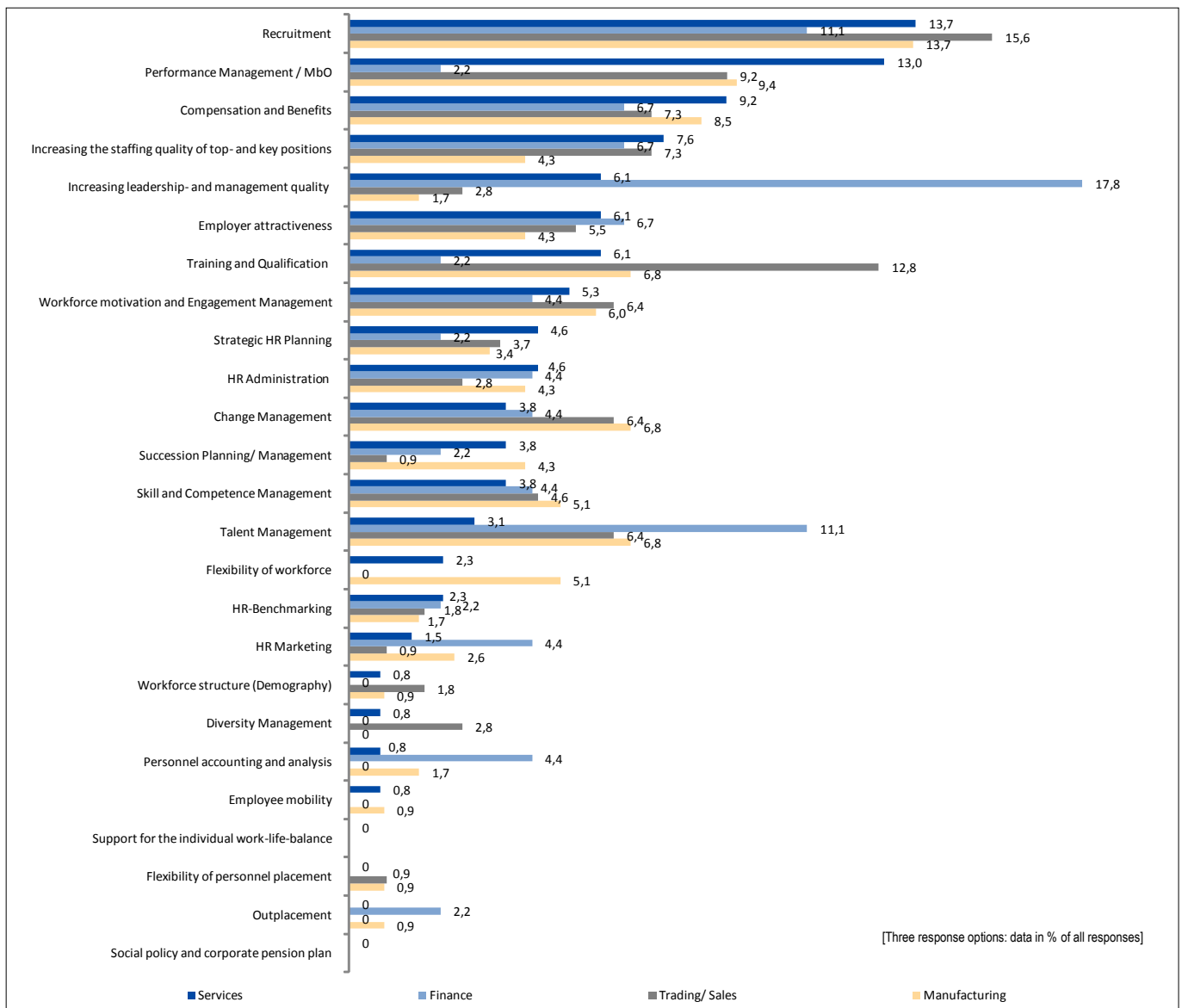


Priorities of HR in 2011 – Comparing Industries

Eastern Europe

For Eastern Europe, the comparison of the HR priorities results in a slightly different picture:

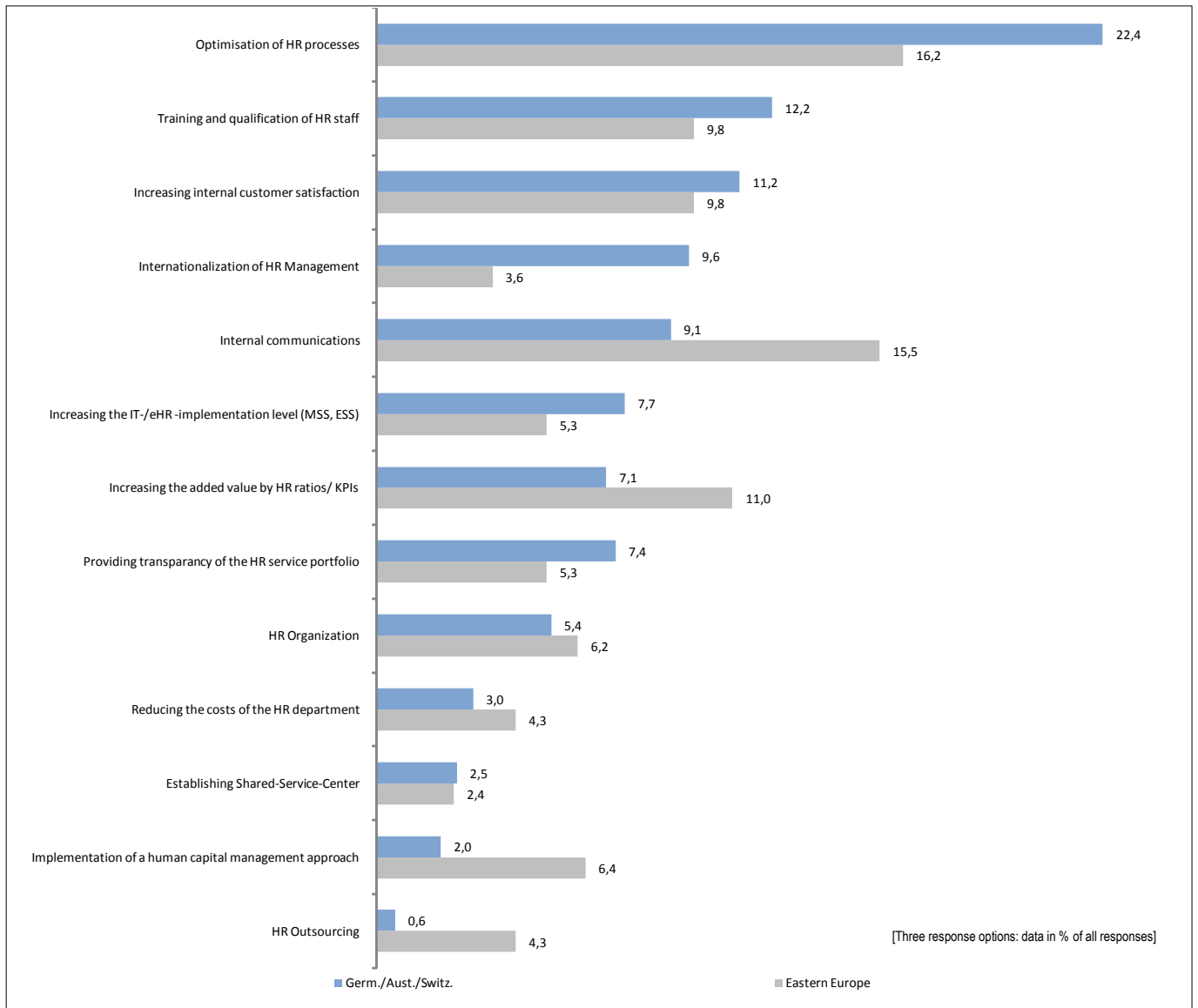
- Again, recruitment is the major topic in HR for 2011 in three out of four sectors, although respondents from the financial sector put the focus more on increasing leadership and management quality as well as on talent management and recruitment.
- Besides recruitment, both the service sector and the manufacturing sector will put an emphasis on the topics of performance management and compensation and benefits.
- While recruitment and performance management will also be a focal point for HR in the trade / sales sector, respondents from this branch of industry also report a focus on training and qualification.



Priorities for Optimized HR in 2011

Priorities for Optimized HR 2011 and a Comparison to Previous Years

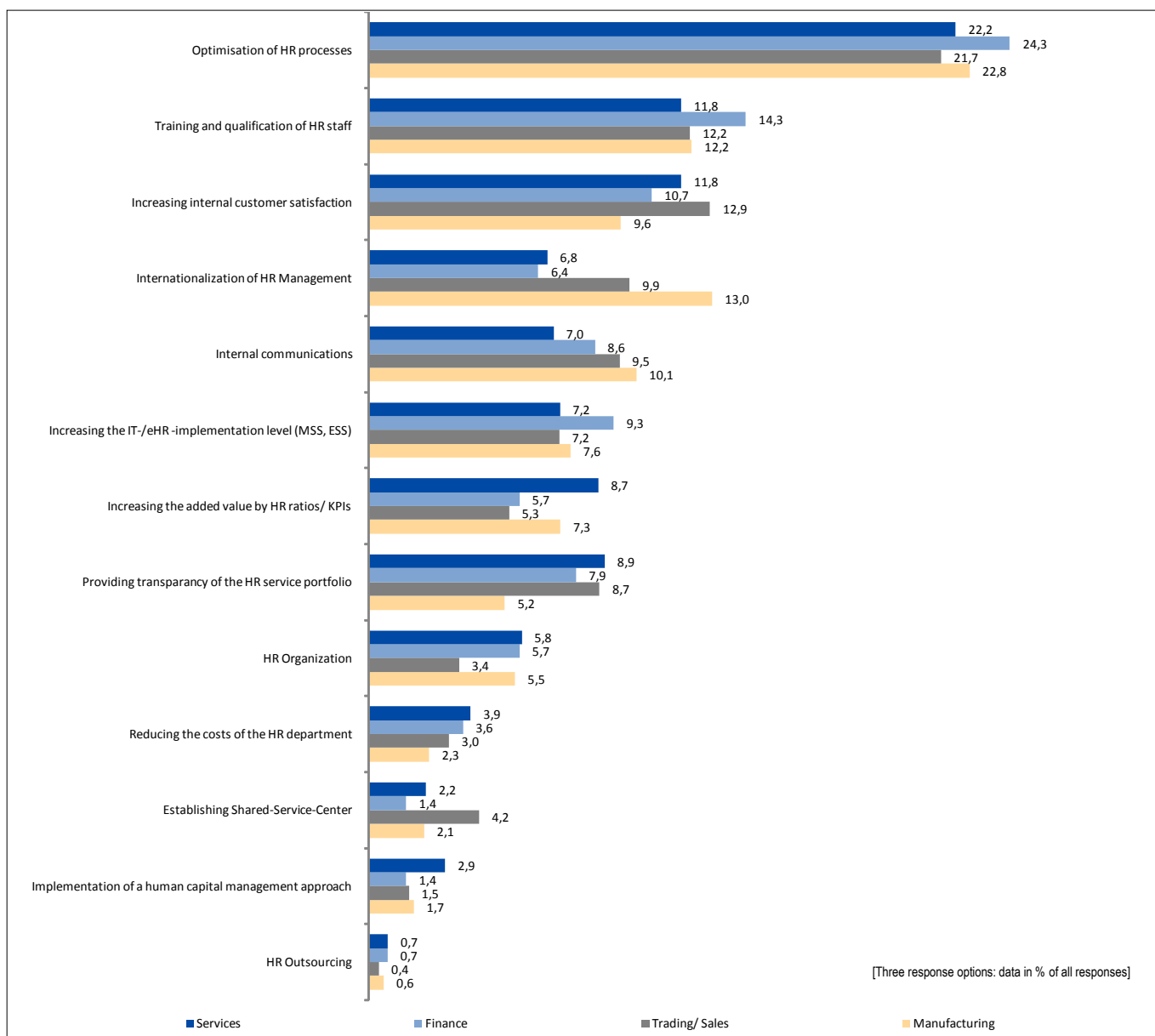
In both regions, the participants view the optimization of HR processes as the best way to optimize HR in general. However, while the training and qualification of HR staff and an increase in internal customer satisfaction are further predominant topics in Germany, Austria, and Switzerland, respondents in Eastern Europe report different starting points. Besides the optimization of HR processes, they seem to struggle especially with internal communications and with measuring the added value of HR (e.g. by HR ratios, KPIs).



Priorities for Optimized HR 2011 – Comparing Industries

Germany, Austria, and Switzerland

Comparing the main ways to optimize HR reported by the participants in the surveyed sectors, only few differences can be identified. In unison, the respondents see the optimization of HR processes as the key to more professional HR. The services and the financial sector view the training and qualification of HR staff and the improvement of internal customer satisfaction as further starting points. While respondents from the trade / sales sector will also focus on topics such as the improvement of the internal customer satisfaction and the training of HR staff, the main themes in the manufacturing sector seem to be the internationalization of HR management and the qualification of its personnel.

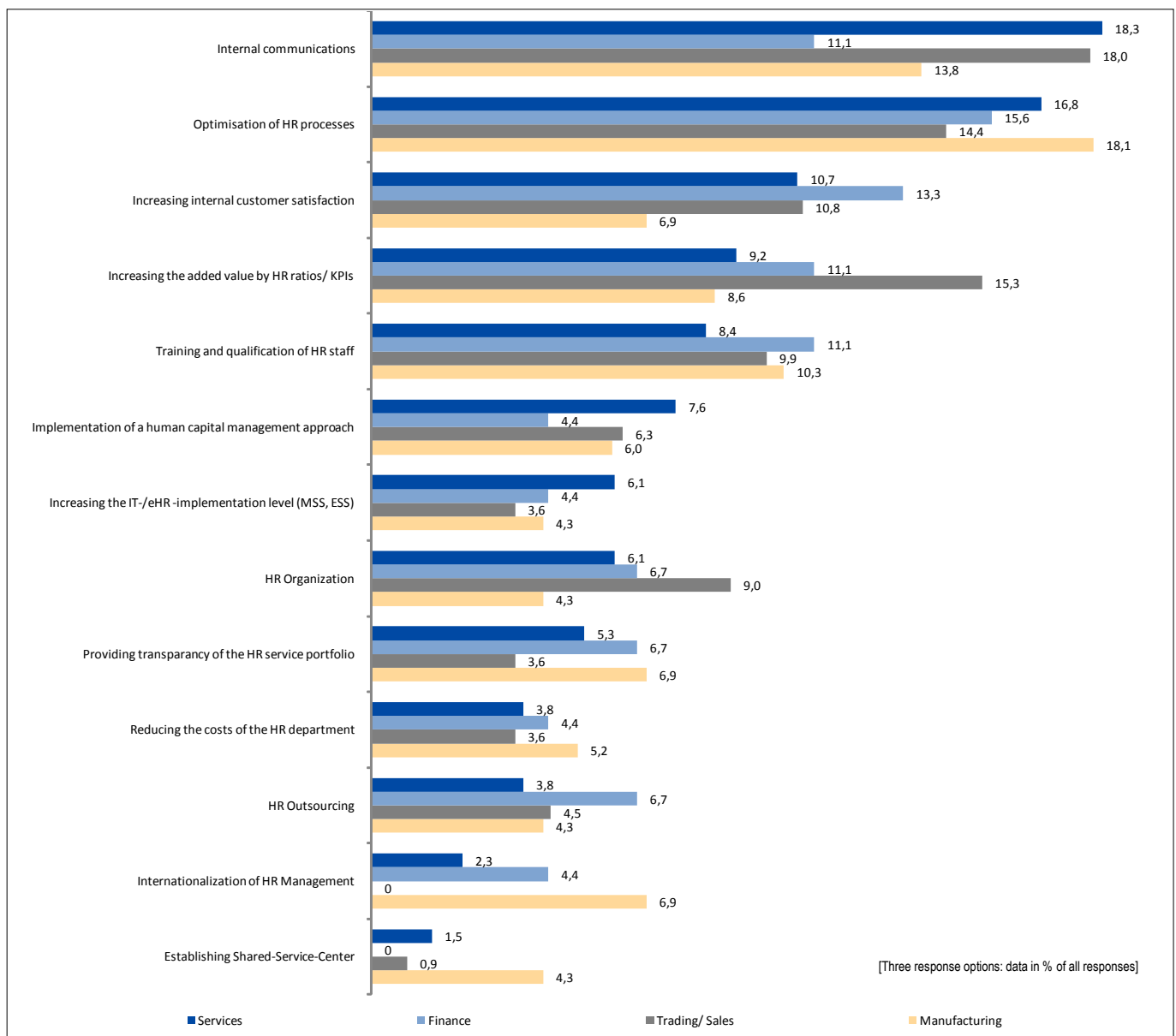


Priorities for Optimized HR 2011 – Comparing Industries

Eastern Europe

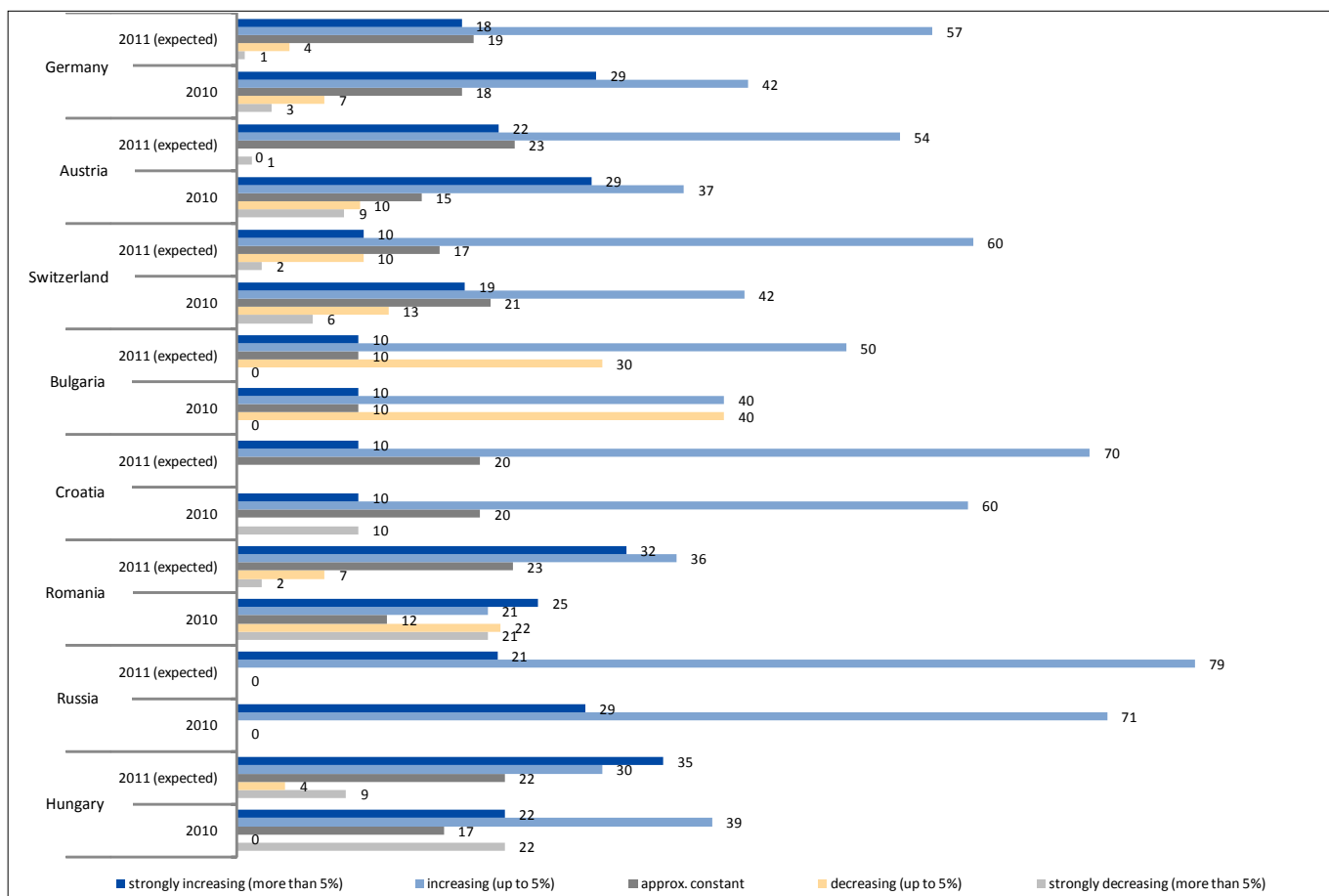
Some similarities between the respondents in Germany, Austria, and Switzerland and the participating organizations in Eastern Europe are visible: Two out of four sectors, namely finance and manufacturing describe the optimization of HR as a top topic for the improvement of HR work. However, while the improvement of internal customer satisfaction, internal communications, the measuring of the added value of HR, and the training of the HR staff seem to dominate in the financial sector, internal communications and the qualification of HR personnel are described as ways to develop the HR department in the manufacturing sector.

Within the service sector and the trade / sales sector, the primary factor for improving HR work is seen in advancing internal communication, the optimization of HR processes, and the improvement of internal customer satisfaction.



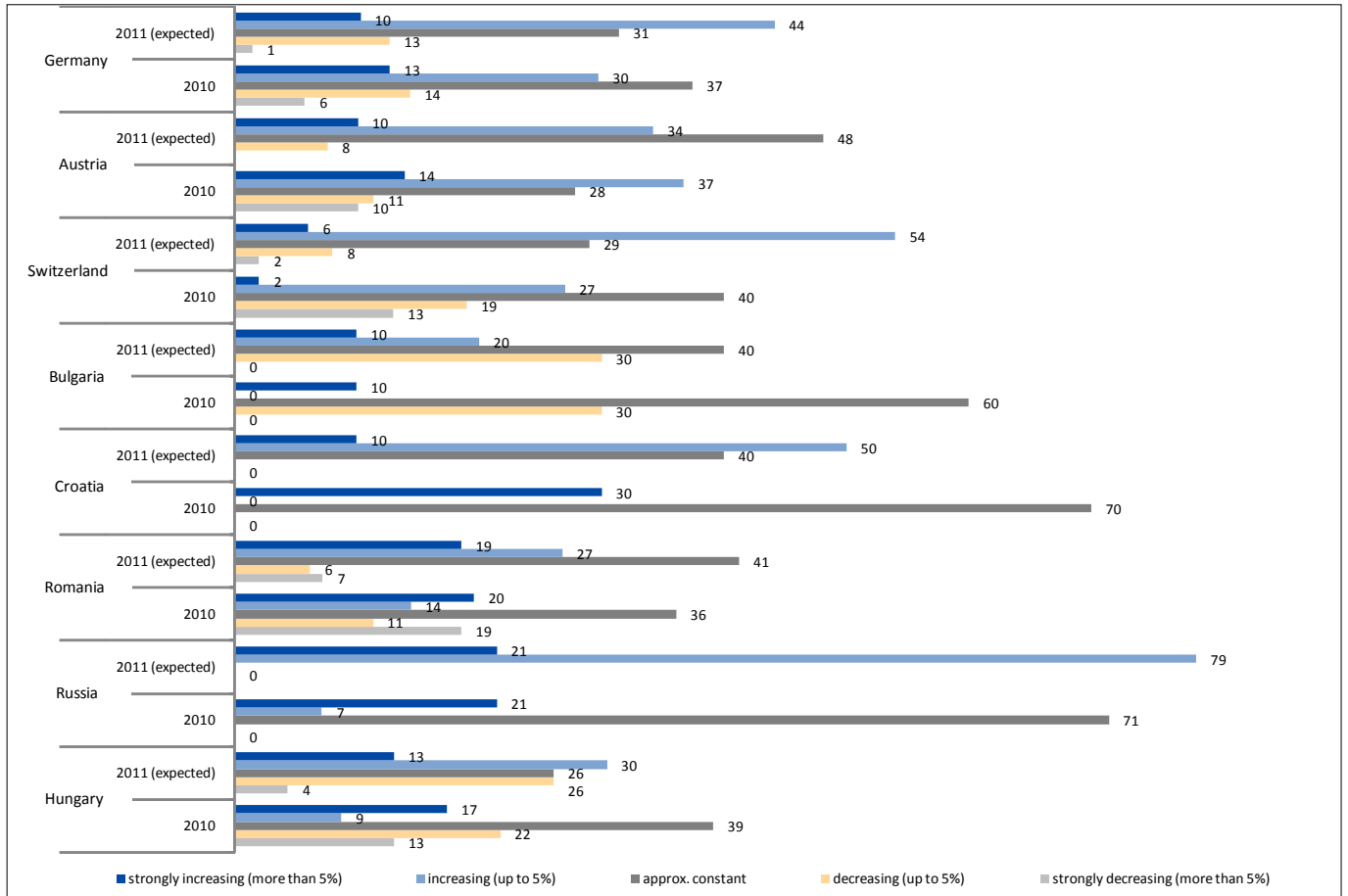
Sales – Comparison by Country

The results for sales expectations make the recovery of the economy obvious in most of the countries taking part in the survey. While Russia, Croatia, and Switzerland in particular show a significant increase in their sales expectations, Romania and Hungary are more cautious in their forecasts.



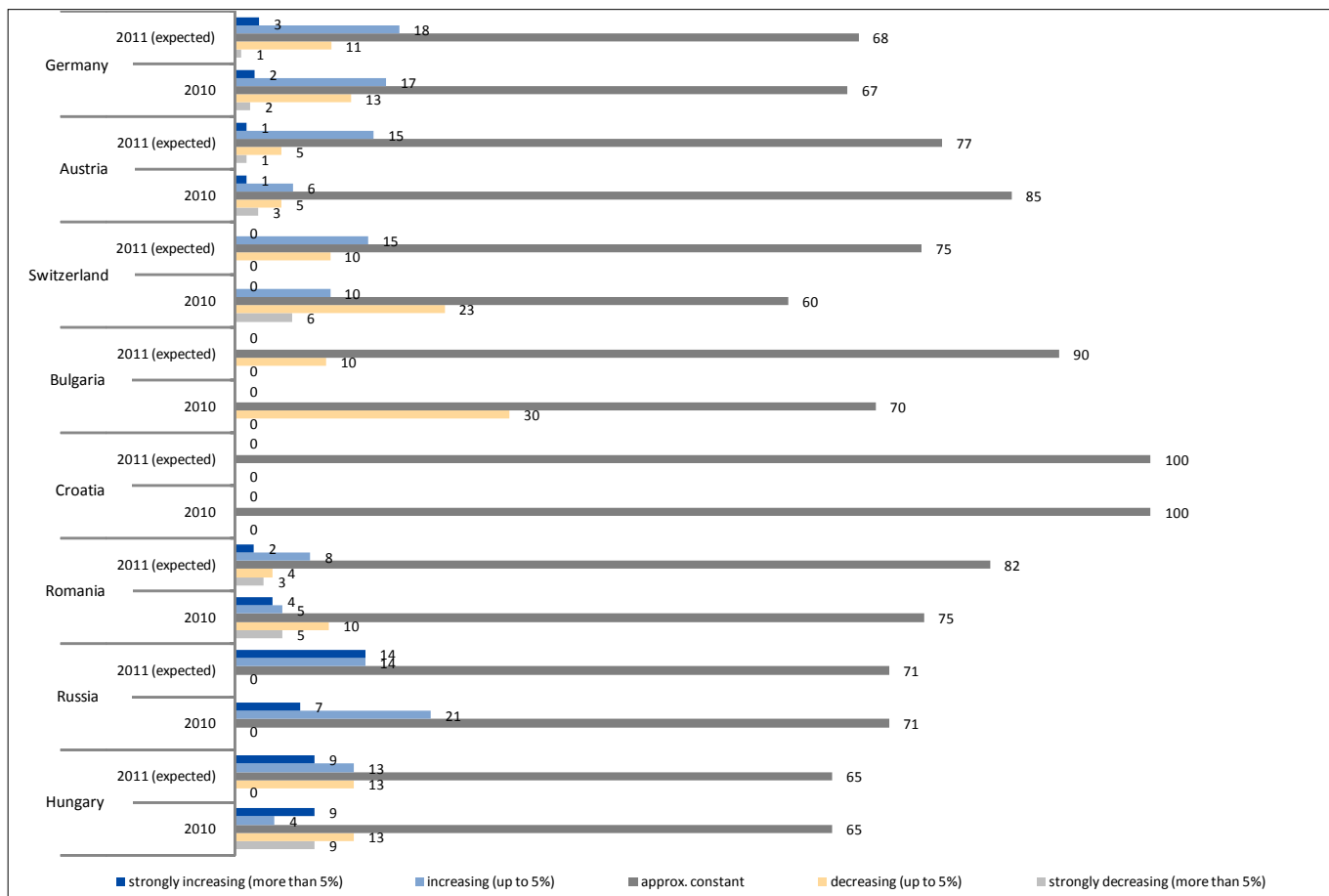
Workforce – Comparison by Country

Compared to sales anticipations, the results for the anticipated development regarding the workforce are slightly more cautious. While respondents from Russia, Switzerland, and Germany especially show positive expectations, many organizations in almost every participating country expect an unchanged workforce for 2011 – in particular in Austria, Bulgaria, Croatia, and Romania.



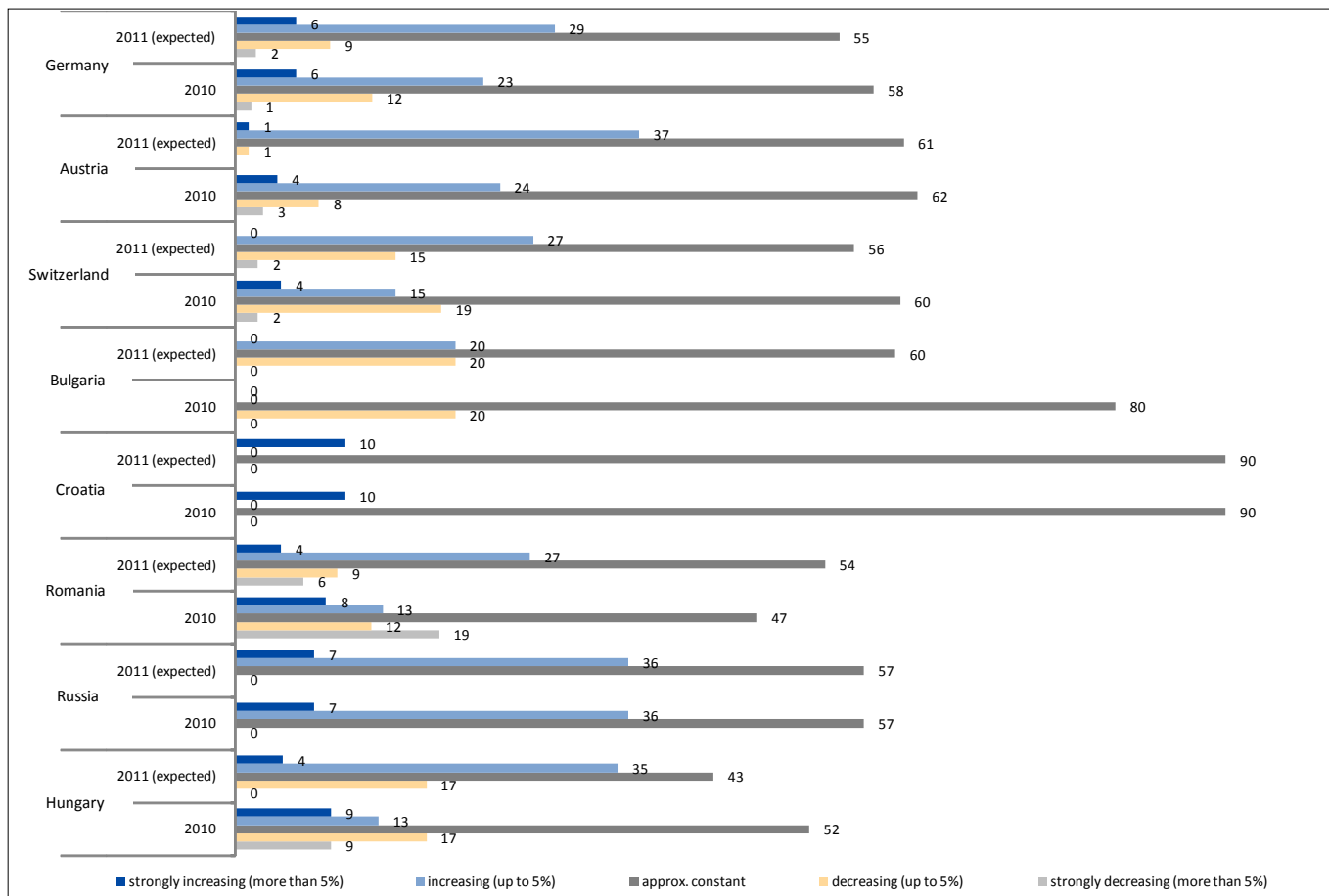
HR Headcount – Comparison by Country

The stagnation of the workforce within the companies becomes especially apparent in the findings regarding the HR headcount. The majority of participants anticipate an unchanged workforce within their HR department in 2011. Only in Russia and - in contrast to their cautious sales expectations – in Hungary do the participants expect a stronger growth of the HR staff.



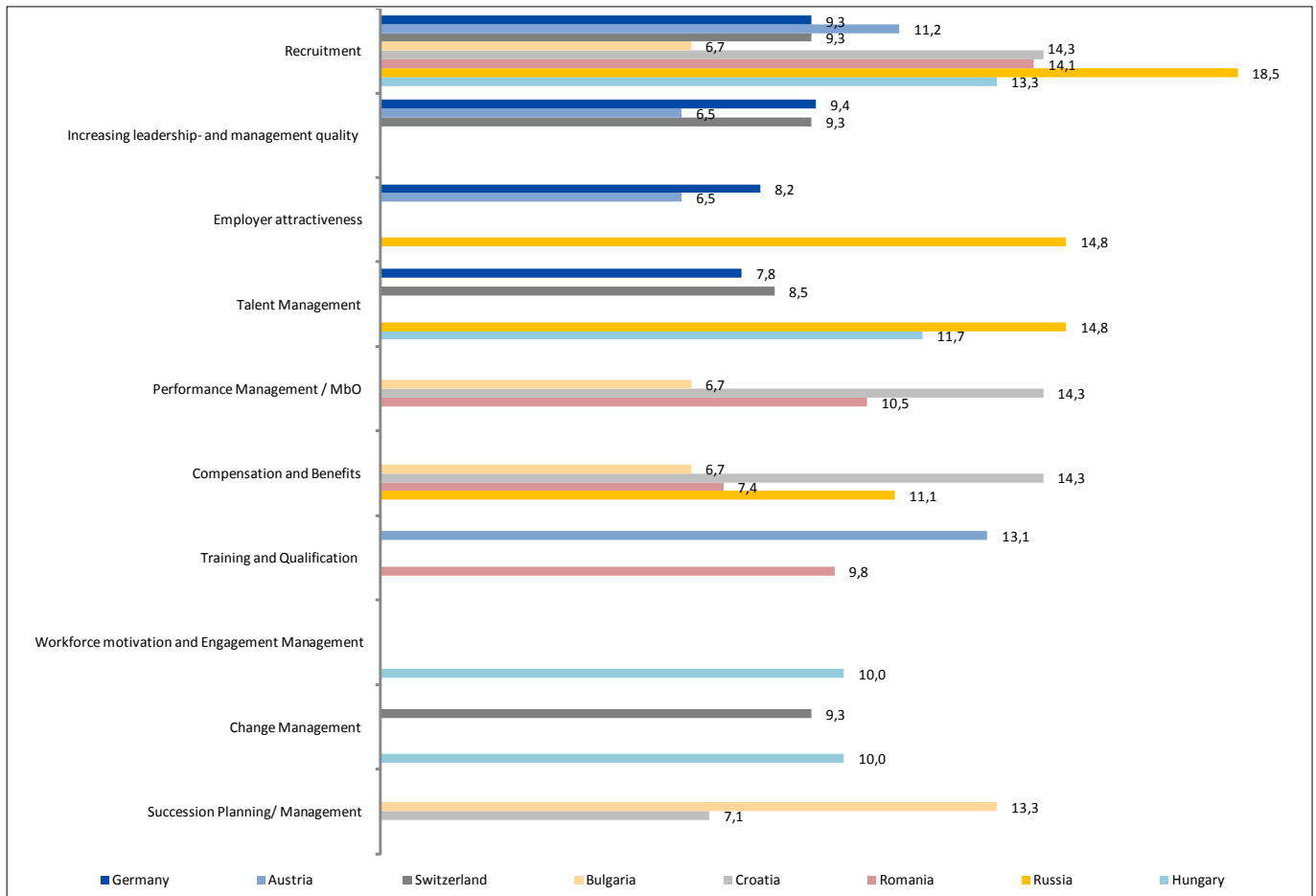
HR Budget – Comparison by Country

Although largely stable, the anticipations of the participants for the HR budget seem to be slightly more positive: Respondents from Russia, Hungary, Austria, Germany, and Switzerland in particular expect increasing HR budgets.



HR Priorities – Comparison by Country

According to the respondents, the dominant field for HR in 2011 in all participating countries will be the recruitment of new staff members. Furthermore, the improvement of leadership and management quality as well as employer attractiveness will be priorities in HR in Germany, Austria, and Switzerland especially. At the same time, compensation and benefits, performance management / MbO, and employer attractiveness will be leading topics for the countries in Eastern Europe, such as Bulgaria, Croatia, Romania, and Russia in particular.

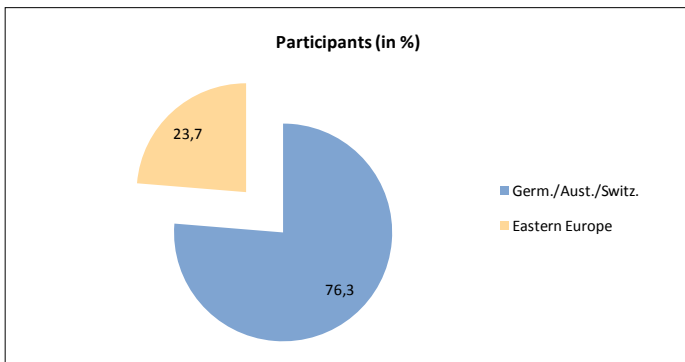


About the Study

Kienbaum has been publishing the HR Climate Index since 2006. It is released within the first quarter of every year and reflects the economic expectations for HR. Its primary purpose is to make the positioning of HR within businesses transparent. Additionally, it is designed to anticipate and to document developing trends in HR in the future.

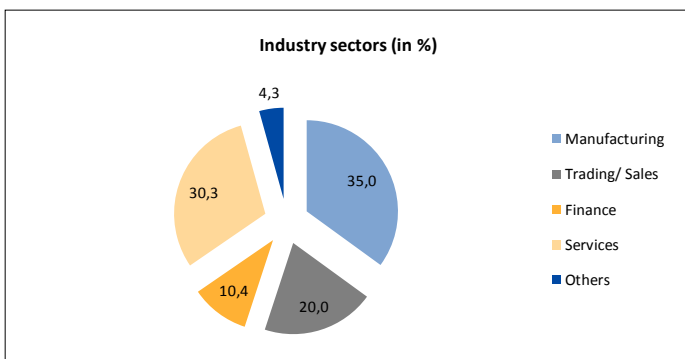
Sample

In total, 713 companies participated in the survey. The largest contingent was from Germany, Austria, and Switzerland (76.3%). Participants from Eastern Europe (Bulgaria, Croatia, the Czech Republic, Hungary, Romania, Russia, Slovakia) represented 23.7% of the sample.



Regarding the participating industries, the sample is made up as follows:

Most participants came from the manufacturing industry (35%), followed by respondents from service sector (30.3%), trade / sales sector (20.0%), and the financial sector (10.4%).



Fact Sheet Germany*

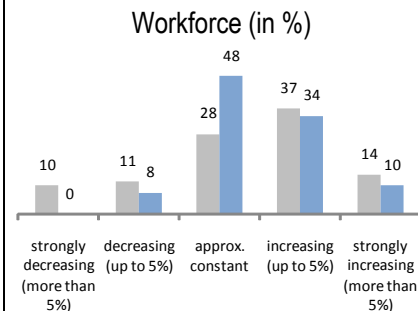
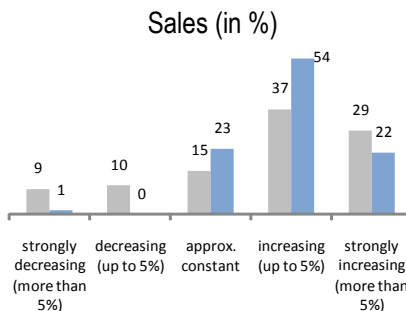
<p>For Germany, three quarters of respondents expect an increase in sales for 2011 – compared to 2010, this represents a small plus of four percentage points. Furthermore, more than half of German participants expect an increase in their personnel.</p>	<p style="text-align: center;">Sales (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>strongly decreasing (more than 5%)</td> <td>3</td> <td>1</td> </tr> <tr> <td>decreasing (up to 5%)</td> <td>7</td> <td>4</td> </tr> <tr> <td>approx. constant</td> <td>18</td> <td>19</td> </tr> <tr> <td>increasing (up to 5%)</td> <td>42</td> <td>57</td> </tr> <tr> <td>strongly increasing (more than 5%)</td> <td>29</td> <td>18</td> </tr> </tbody> </table>	Category	2010 (%)	2011 (expected) (%)	strongly decreasing (more than 5%)	3	1	decreasing (up to 5%)	7	4	approx. constant	18	19	increasing (up to 5%)	42	57	strongly increasing (more than 5%)	29	18	<p style="text-align: center;">Workforce (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>strongly decreasing (more than 5%)</td> <td>6</td> <td>1</td> </tr> <tr> <td>decreasing (up to 5%)</td> <td>14</td> <td>13</td> </tr> <tr> <td>approx. constant</td> <td>37</td> <td>31</td> </tr> <tr> <td>increasing (up to 5%)</td> <td>30</td> <td>44</td> </tr> <tr> <td>strongly increasing (more than 5%)</td> <td>13</td> <td>10</td> </tr> </tbody> </table>	Category	2010 (%)	2011 (expected) (%)	strongly decreasing (more than 5%)	6	1	decreasing (up to 5%)	14	13	approx. constant	37	31	increasing (up to 5%)	30	44	strongly increasing (more than 5%)	13	10
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<p>Nearly half of German participants report that HR in their company is perceived strongly as a business partner. By contrast to this rather strong perception, the participants record a more diversified range of involvement in strategic projects and initiatives. More than 50% report an involvement of 40% or less.</p>	<p style="text-align: center;">HR as Business Partner (in %)</p> <table border="1"> <thead> <tr> <th>Perception Level</th> <th>Percentage (%)</th> </tr> </thead> <tbody> <tr> <td>not at all</td> <td>1</td> </tr> <tr> <td>very little</td> <td>5</td> </tr> <tr> <td>little</td> <td>11</td> </tr> <tr> <td>not very strongly</td> <td>35</td> </tr> <tr> <td>strongly</td> <td>41</td> </tr> <tr> <td>very strongly</td> <td>7</td> </tr> </tbody> </table>	Perception Level	Percentage (%)	not at all	1	very little	5	little	11	not very strongly	35	strongly	41	very strongly	7	<p style="text-align: center;">HR in Strat. Projects / Initiatives (in %)</p> <table border="1"> <thead> <tr> <th>Involvement Level</th> <th>Percentage (%)</th> </tr> </thead> <tbody> <tr> <td>0%</td> <td>2</td> </tr> <tr> <td>20%</td> <td>25</td> </tr> <tr> <td>40%</td> <td>29</td> </tr> <tr> <td>60%</td> <td>21</td> </tr> <tr> <td>80%</td> <td>19</td> </tr> <tr> <td>100%</td> <td>5</td> </tr> </tbody> </table>	Involvement Level	Percentage (%)	0%	2	20%	25	40%	29	60%	21	80%	19	100%	5								
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<p>For Germany, the participants estimated that the improvement of leadership and management quality, recruitment, employer branding, and talent management in particular will be the most important topics in HR for 2011.</p> <p>The optimization of HR processes, training of HR staff, and improvement of internal customer satisfaction, but also the internationalization of HR management are suitable ways to optimize their HR from the point of view of the German respondents.</p>	<p style="text-align: center;">Priorities in HR (in %)</p> <table border="1"> <thead> <tr> <th>Priority</th> <th>Percentage (%)</th> </tr> </thead> <tbody> <tr> <td>Increasing leadership- and management quality</td> <td>9,4</td> </tr> <tr> <td>Recruitment</td> <td>9,3</td> </tr> <tr> <td>Employer attractiveness</td> <td>8,2</td> </tr> <tr> <td>Talent Management</td> <td>7,8</td> </tr> </tbody> </table>	Priority	Percentage (%)	Increasing leadership- and management quality	9,4	Recruitment	9,3	Employer attractiveness	8,2	Talent Management	7,8	<p style="text-align: center;">Ways to Optimize HR (in %)</p> <table border="1"> <thead> <tr> <th>Way to Optimize</th> <th>Percentage (%)</th> </tr> </thead> <tbody> <tr> <td>Optimization of HR processes</td> <td>23,1</td> </tr> <tr> <td>Training and qualification of HR staff</td> <td>12,5</td> </tr> <tr> <td>Increasing internal customer satisfaction</td> <td>11,1</td> </tr> <tr> <td>Internationalization of HR Management</td> <td>10,2</td> </tr> </tbody> </table>	Way to Optimize	Percentage (%)	Optimization of HR processes	23,1	Training and qualification of HR staff	12,5	Increasing internal customer satisfaction	11,1	Internationalization of HR Management	10,2																
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■ 2010 ■ 2011 (expected)

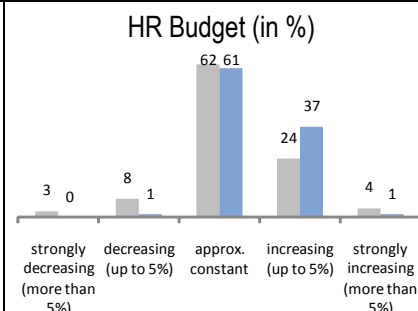
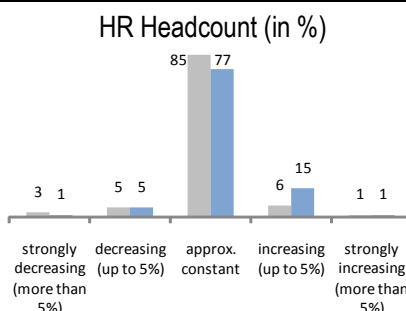
* 59.4% of all participants

Fact Sheet Austria*

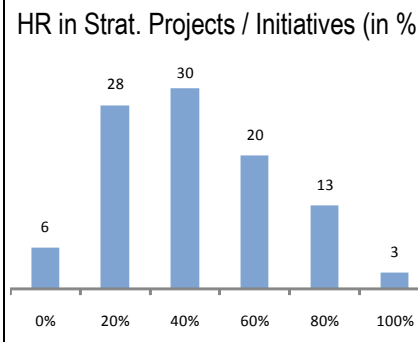
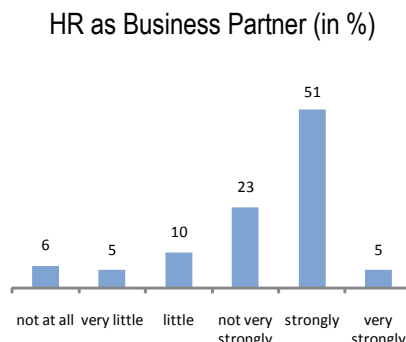
The majority of respondents from Austria expect increasing sales, although the amount of participants expecting a strong increase decreases by about 8 percentage points compared to 2010. However, only approximately half of respondents anticipate an increase in their workforce (44.3%).



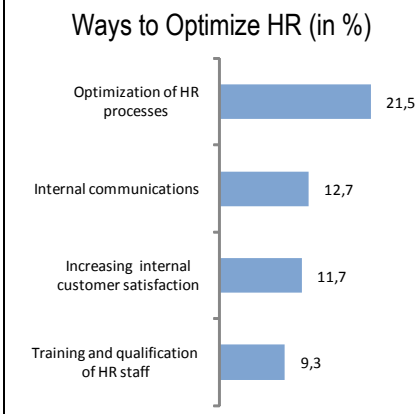
Although sales expectations are increasing in Austria, the resources for HR remain mostly constant. Only 18.5% of Austrian participants anticipate an increasing HR headcount, but, after all, 38% do expect an increase in their HR budgets in 2011.



The Austrian participants reported an intensive perception of HR as a business partner within their organizations - more than half of them described it as strong or as very strong. However, this is not reflected entirely in the involvement of HR in strategic projects, which even decreases compared to 2011. The amount of people expecting an involvement of 60% or higher has decreased about 6 percentage points since 2010.



In Austria, the respondents expect that training and qualification as well as recruitment, followed by the improvement of leadership and management quality and employer attractiveness will be the most important themes in HR in 2011.



Besides the training and qualification of HR staff and the improvement of internal customer satisfaction, they also point out that the optimization of HR processes and the improvement of internal communications are the most crucial starting points for optimizing HR.

■ 2010 ■ 2011 (expected)

* 11.3% of all participants

Fact Sheet Switzerland*

<p>Almost three quarters of the Swiss participants await an increase in their sales in 2011. Furthermore, more than 60% expect a growth in their workforce.</p>	<p style="text-align: center;">Sales (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>strongly decreasing (more than 5%)</td> <td>6</td> <td>2</td> </tr> <tr> <td>decreasing (up to 5%)</td> <td>13</td> <td>10</td> </tr> <tr> <td>approx. constant</td> <td>21</td> <td>17</td> </tr> <tr> <td>increasing (up to 5%)</td> <td>42</td> <td>60</td> </tr> <tr> <td>strongly increasing (more than 5%)</td> <td>19</td> <td>10</td> </tr> </tbody> </table>	Category	2010 (%)	2011 (expected) (%)	strongly decreasing (more than 5%)	6	2	decreasing (up to 5%)	13	10	approx. constant	21	17	increasing (up to 5%)	42	60	strongly increasing (more than 5%)	19	10	<p style="text-align: center;">Workforce (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>strongly decreasing (more than 5%)</td> <td>13</td> <td>2</td> </tr> <tr> <td>decreasing (up to 5%)</td> <td>19</td> <td>8</td> </tr> <tr> <td>approx. constant</td> <td>40</td> <td>29</td> </tr> <tr> <td>increasing (up to 5%)</td> <td>27</td> <td>54</td> </tr> <tr> <td>strongly increasing (more than 5%)</td> <td>2</td> <td>6</td> </tr> </tbody> </table>	Category	2010 (%)	2011 (expected) (%)	strongly decreasing (more than 5%)	13	2	decreasing (up to 5%)	19	8	approx. constant	40	29	increasing (up to 5%)	27	54	strongly increasing (more than 5%)	2	6
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<p>While 56% of respondents in Switzerland state that in their organizations HR is only seen marginally as a business partner, 44% state the opposite. Again, 60% of these participants point out that the involvement of HR in strategic projects and initiatives is 40% at most, a finding that does not mirror the high perception of HR as a business partner.</p>	<p style="text-align: center;">HR as Business Partner (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> </tr> </thead> <tbody> <tr> <td>not at all</td> <td>0</td> </tr> <tr> <td>very little</td> <td>4</td> </tr> <tr> <td>little</td> <td>6</td> </tr> <tr> <td>not very strongly</td> <td>46</td> </tr> <tr> <td>strongly</td> <td>35</td> </tr> <tr> <td>very strongly</td> <td>8</td> </tr> </tbody> </table>	Category	2010 (%)	not at all	0	very little	4	little	6	not very strongly	46	strongly	35	very strongly	8	<p style="text-align: center;">HR in Strat. Projects / Initiatives (in %)</p> <table border="1"> <thead> <tr> <th>Percentage</th> <th>2010 (%)</th> </tr> </thead> <tbody> <tr> <td>0%</td> <td>6</td> </tr> <tr> <td>20%</td> <td>29</td> </tr> <tr> <td>40%</td> <td>25</td> </tr> <tr> <td>60%</td> <td>15</td> </tr> <tr> <td>80%</td> <td>17</td> </tr> <tr> <td>100%</td> <td>8</td> </tr> </tbody> </table>	Percentage	2010 (%)	0%	6	20%	29	40%	25	60%	15	80%	17	100%	8								
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Fact Sheet Bulgaria*

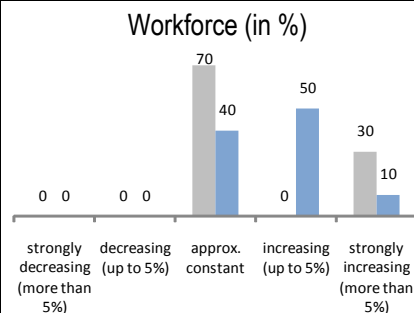
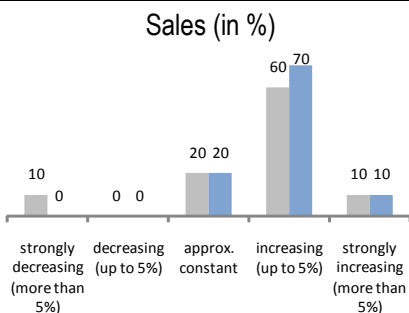
<p>The expectations about sales for 2011 among respondents from Bulgaria are rather heterogeneous: While 60% expect an increase in their sales – a growth of ten percentage points compared to 2010 – 30% anticipate a decrease in sales. This may explain the rather restrained outlook for workforce developments: 70% of respondents predict a stable or decreasing workforce.</p>	<p style="text-align: center;">Sales (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>strongly decreasing (more than 5%)</td> <td>0</td> <td>0</td> </tr> <tr> <td>decreasing (up to 5%)</td> <td>40</td> <td>30</td> </tr> <tr> <td>approx. constant</td> <td>10</td> <td>10</td> </tr> <tr> <td>increasing (up to 5%)</td> <td>40</td> <td>50</td> </tr> <tr> <td>strongly increasing (more than 5%)</td> <td>10</td> <td>10</td> </tr> </tbody> </table>	Category	2010 (%)	2011 (expected) (%)	strongly decreasing (more than 5%)	0	0	decreasing (up to 5%)	40	30	approx. constant	10	10	increasing (up to 5%)	40	50	strongly increasing (more than 5%)	10	10	<p style="text-align: center;">Workforce (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>strongly decreasing (more than 5%)</td> <td>0</td> <td>0</td> </tr> <tr> <td>decreasing (up to 5%)</td> <td>30</td> <td>30</td> </tr> <tr> <td>approx. constant</td> <td>60</td> <td>40</td> </tr> <tr> <td>increasing (up to 5%)</td> <td>0</td> <td>20</td> </tr> <tr> <td>strongly increasing (more than 5%)</td> <td>10</td> <td>10</td> </tr> </tbody> </table>	Category	2010 (%)	2011 (expected) (%)	strongly decreasing (more than 5%)	0	0	decreasing (up to 5%)	30	30	approx. constant	60	40	increasing (up to 5%)	0	20	strongly increasing (more than 5%)	10	10						
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<p>The statements concerning the perception of HR as a business partner are mixed. Half of participants describe that their HR is seen consistently as a business partner within the company, while the other half saw this perception at a less high-profile level. Rather in line with the latter finding, 70% of the participants describe the involvement of HR in strategic projects/ initiatives at 40 % or less.</p>	<p style="text-align: center;">HR as Business Partner (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>not at all</td> <td>0</td> <td>0</td> </tr> <tr> <td>very little</td> <td>0</td> <td>0</td> </tr> <tr> <td>little</td> <td>0</td> <td>0</td> </tr> <tr> <td>not very strongly</td> <td>50</td> <td>50</td> </tr> <tr> <td>strongly</td> <td>50</td> <td>50</td> </tr> <tr> <td>very strongly</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Category	2010 (%)	2011 (expected) (%)	not at all	0	0	very little	0	0	little	0	0	not very strongly	50	50	strongly	50	50	very strongly	0	0	<p style="text-align: center;">HR in Strat. Projects / Initiatives (in %)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>0%</td> <td>10</td> <td>10</td> </tr> <tr> <td>20%</td> <td>20</td> <td>20</td> </tr> <tr> <td>40%</td> <td>40</td> <td>40</td> </tr> <tr> <td>60%</td> <td>20</td> <td>20</td> </tr> <tr> <td>80%</td> <td>10</td> <td>10</td> </tr> <tr> <td>100%</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Category	2010 (%)	2011 (expected) (%)	0%	10	10	20%	20	20	40%	40	40	60%	20	20	80%	10	10	100%	0	0
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<p>The special topics for HR in 2011 named by Bulgarian respondents were, above all, succession planning / management, followed by recruitment, performance management, and compensation and benefits.</p> <p>Besides that, they view the optimization of HR processes, the growth of added value by HR ratios / KPIs, creating transparency in the HR service portfolio and the improvement of the satisfaction of internal customers as primary ways to enhance HR.</p>	<p style="text-align: center;">Priorities in HR (in %)</p> <table border="1"> <thead> <tr> <th>Priority</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>Succession Planning/ Management</td> <td>13,3</td> <td>13,3</td> </tr> <tr> <td>Recruitment</td> <td>6,7</td> <td>6,7</td> </tr> <tr> <td>Performance Management / MbO</td> <td>6,7</td> <td>6,7</td> </tr> <tr> <td>Compensation and Benefits</td> <td>6,7</td> <td>6,7</td> </tr> </tbody> </table>	Priority	2010 (%)	2011 (expected) (%)	Succession Planning/ Management	13,3	13,3	Recruitment	6,7	6,7	Performance Management / MbO	6,7	6,7	Compensation and Benefits	6,7	6,7	<p style="text-align: center;">Ways to Optimize HR (in %)</p> <table border="1"> <thead> <tr> <th>Way to Optimize</th> <th>2010 (%)</th> <th>2011 (expected) (%)</th> </tr> </thead> <tbody> <tr> <td>Optimization of HR processes</td> <td>20,0</td> <td>20,0</td> </tr> <tr> <td>Increasing the added value through HR ratios/ KPIs</td> <td>20,0</td> <td>20,0</td> </tr> <tr> <td>Providing transparency of the HR service portfolio</td> <td>20,0</td> <td>20,0</td> </tr> <tr> <td>Increasing the internal customer satisfaction</td> <td>6,7</td> <td>6,7</td> </tr> </tbody> </table>	Way to Optimize	2010 (%)	2011 (expected) (%)	Optimization of HR processes	20,0	20,0	Increasing the added value through HR ratios/ KPIs	20,0	20,0	Providing transparency of the HR service portfolio	20,0	20,0	Increasing the internal customer satisfaction	6,7	6,7												
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Optimization of HR processes	20,0	20,0																																										
Increasing the added value through HR ratios/ KPIs	20,0	20,0																																										
Providing transparency of the HR service portfolio	20,0	20,0																																										
Increasing the internal customer satisfaction	6,7	6,7																																										

■ 2010 ■ 2011 (expected)

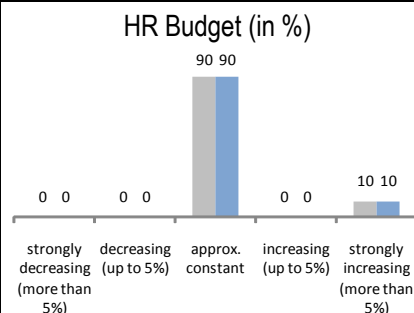
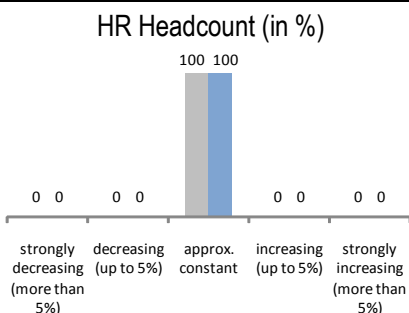
* 1.4% of all participants

Fact Sheet Croatia*

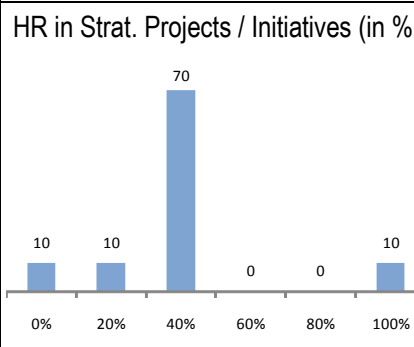
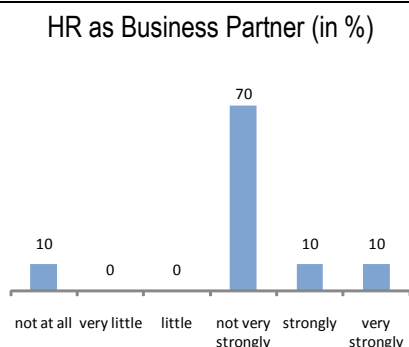
Sales expectations in Croatia seem to be positive: 80% of Croatian respondents anticipate an increase in sales for 2011, and 60% await a growth in their workforce.



However, nearly all of the respondents expect unchanging HR resources. All participants from Croatia anticipate stable HR headcounts, while most of them also expect the budget of HR to remain the same. Only 10% foresee an increase in HR budgets.



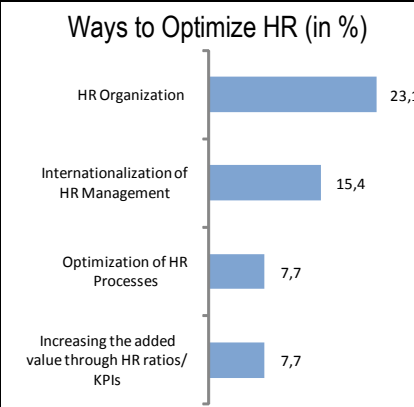
According to the respondents, HR is not seen very strongly as a business partner in Croatian businesses – 70% describe this perception within their company as having a lower intensity. Correspondingly, 90% point out that their HR is involved in strategic projects/ initiatives at 40% or less.



For the participants in Croatia, recruitment, performance management, compensation and benefits in particular, and – at some distance – succession planning / management will be the top topics in HR for 2011.



Besides that, the organization of the HR department, its international management as well as the optimisation of HR processes and the improvement of the added value by HR ratios/ KPIs are seen as crucial for the optimization of HR in general.

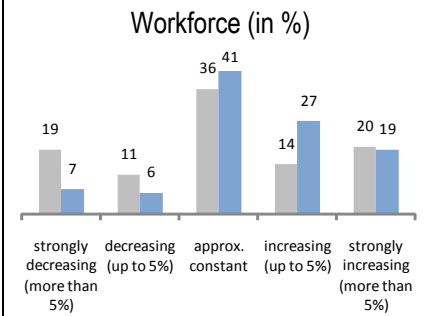
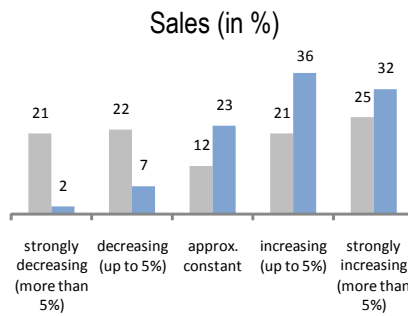


■ 2010 ■ 2011 (expected)

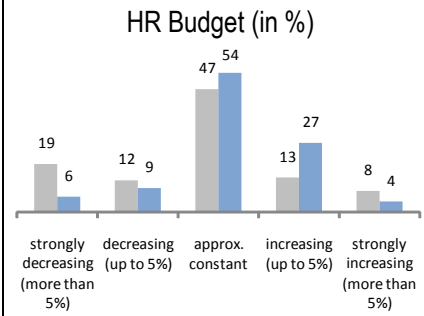
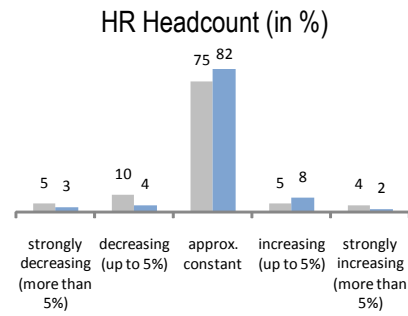
* 1.4% of all participants

Fact Sheet Romania*

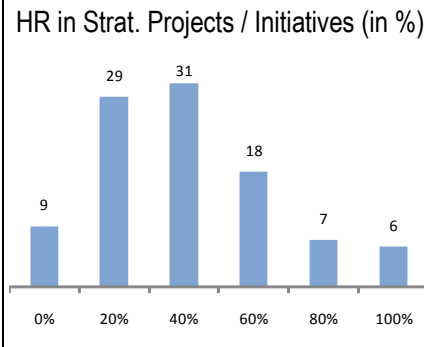
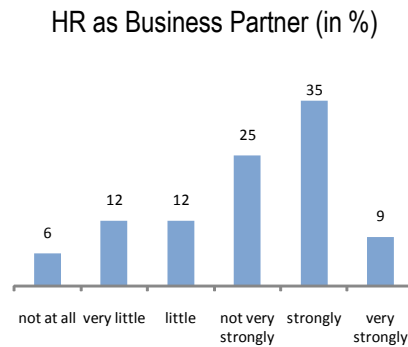
For Romania, almost 70% of the participants state that they anticipate a (strong) increase in their sales. Furthermore, 45% expect for 2011 a growth in their workforce.



While sales expectations are rising, the anticipations for HR's personnel resources are more restrained in Romania. More than 80% expect the HR headcount to remain stable, although more than a quarter of respondents anticipate that the HR budget will grow in 2011.



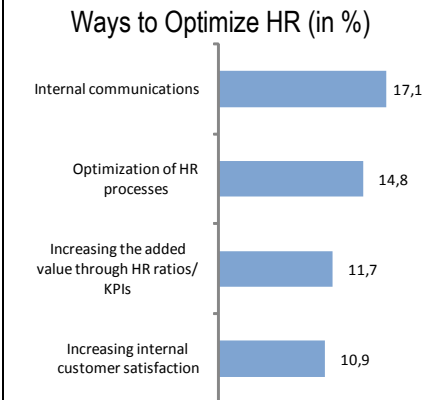
The perception of HR as a business partner within the organization is rather mixed among Romanian participants: While 56% describe it as not very strong or weaker, 44% picture it as (very) strong. However, the involvement of HR in strategic projects/ initiatives is moderate. Almost three quarters of respondents describe it at 40% or less.



Above all, recruitment will be the primary topic in HR for 2011 according to the Romanian survey participants, followed by performance management, training, and compensation and benefits.



The most important starting points for optimizing HR are seen in the improvement of internal communications, the optimization of HR processes as well as in the improvement of the added value of HR by controlling tools such as HR ratios / KPIs and in the advancement of the satisfaction of internal HR customers.

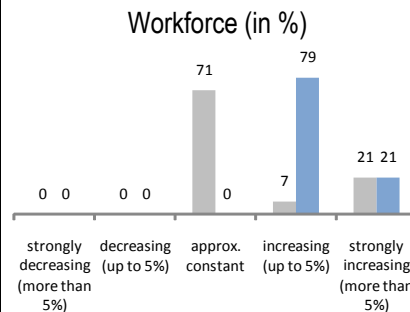
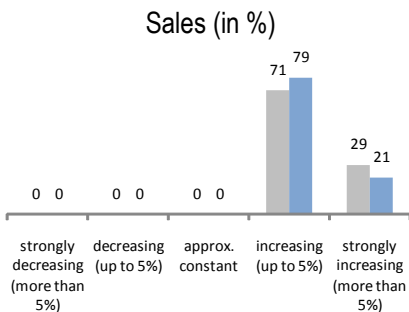


■ 2010 ■ 2011 (expected)

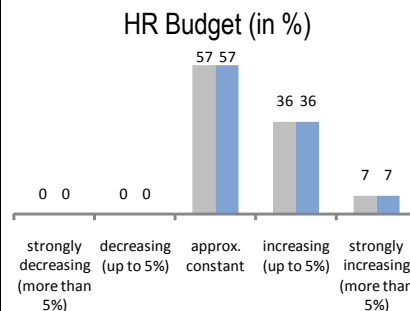
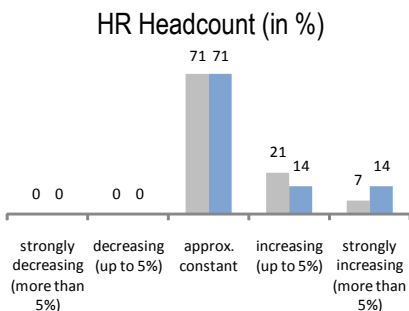
* 13.8% of all participants

Fact Sheet Russia*

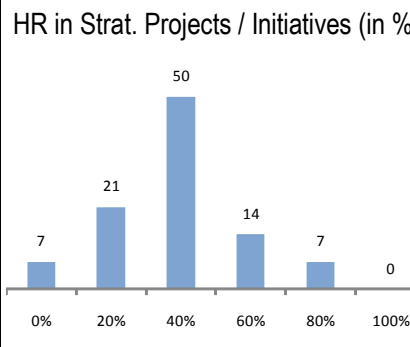
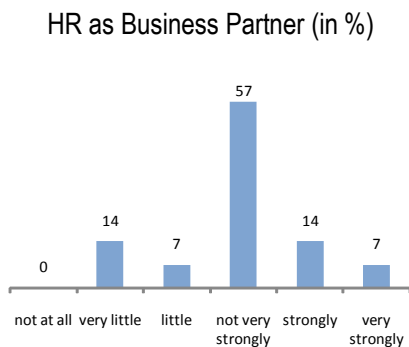
The expectations about sales in Russia are consistently positive: All participants expect a more or less intensive increase in their sales. This optimism is fully mirrored in the expectations about the workforce: All respondents expect a growth in their staff levels.



The highly positive expectations about sales are not reflected in the anticipations about HR's personnel resources: Around 70% of respondents in Russia anticipate an unchanged HR headcount. Still, more than 40% expect increasing HR budgets for 2011.



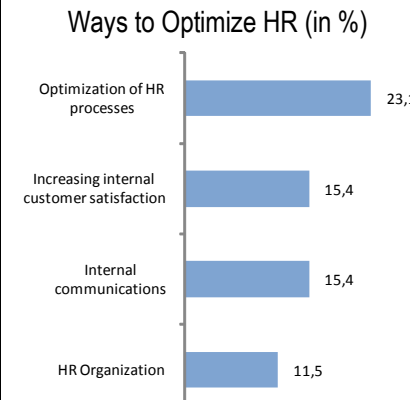
The majority of Russian respondents describe the perception of HR as a business partner in their organization as rather weak; only 21% see it as (very) intensive. This result is also reflected in the rather limited involvement of HR in strategic aspects. Almost 80% estimate this strategic integration of HR at 40% or less.



Given the expectations about sales and the workforce, the participants predict the major topic for HR in 2011 to be recruitment. Furthermore, talent management, employer attractiveness, and compensation and benefits will be crucial themes in HR.



Furthermore, the respondents describe the optimization of HR processes, the improvement of internal customer satisfaction as well as internal communications and HR organization as primary ways to optimize their HR.

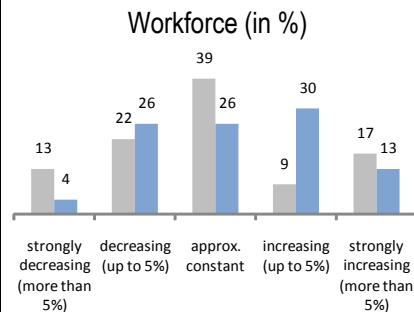
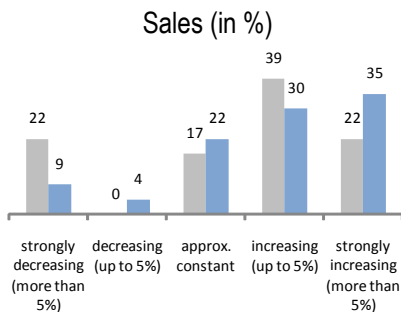


■ 2010 ■ 2011 (expected)

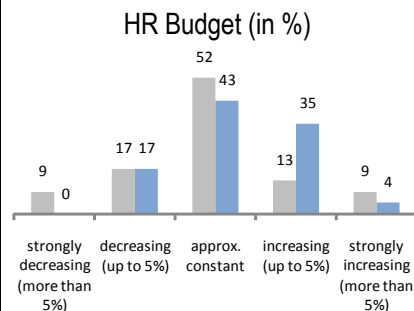
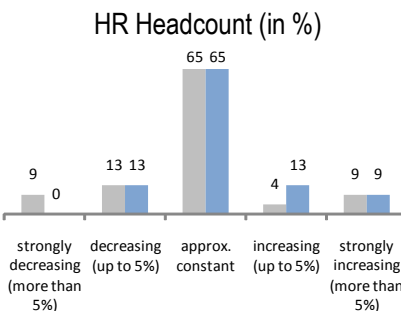
* 2.0% of all participants

Fact Sheet Hungary*

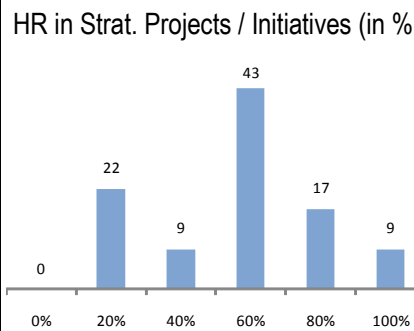
On the one hand, a majority of almost two thirds of participants from Hungary state that they expect an increase in their sales in 2011. On the other hand, 13% anticipate a drop in their revenues. This somehow restrained outlook about upcoming sales is reflected in the expectations about the workforce. The majority of 56% forecast an either stable or even (strongly) decreasing workforce.



The anticipations about the resources of HR are also rather cautious. While most of the respondents in Hungary do not expect that the HR headcount in their companies will change, almost 40% of them nevertheless anticipate a growth in the financial resources of HR.



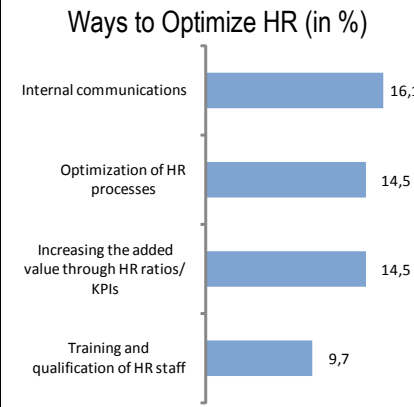
The Hungarian respondents present a mixed picture concerning HR's perception as a business partner in their organizations: While almost half of them describe this in rather weak terms, the other half pictures it as (very) strong. This is to some extent reflected in the results concerning the involvement of HR in strategic aspects. Almost 70% describe its extent at 60% or higher.



Recruitment, talent management, the motivation and engagement of employees, and change management are the major topics for HR in 2011 according to the participants in Hungary.



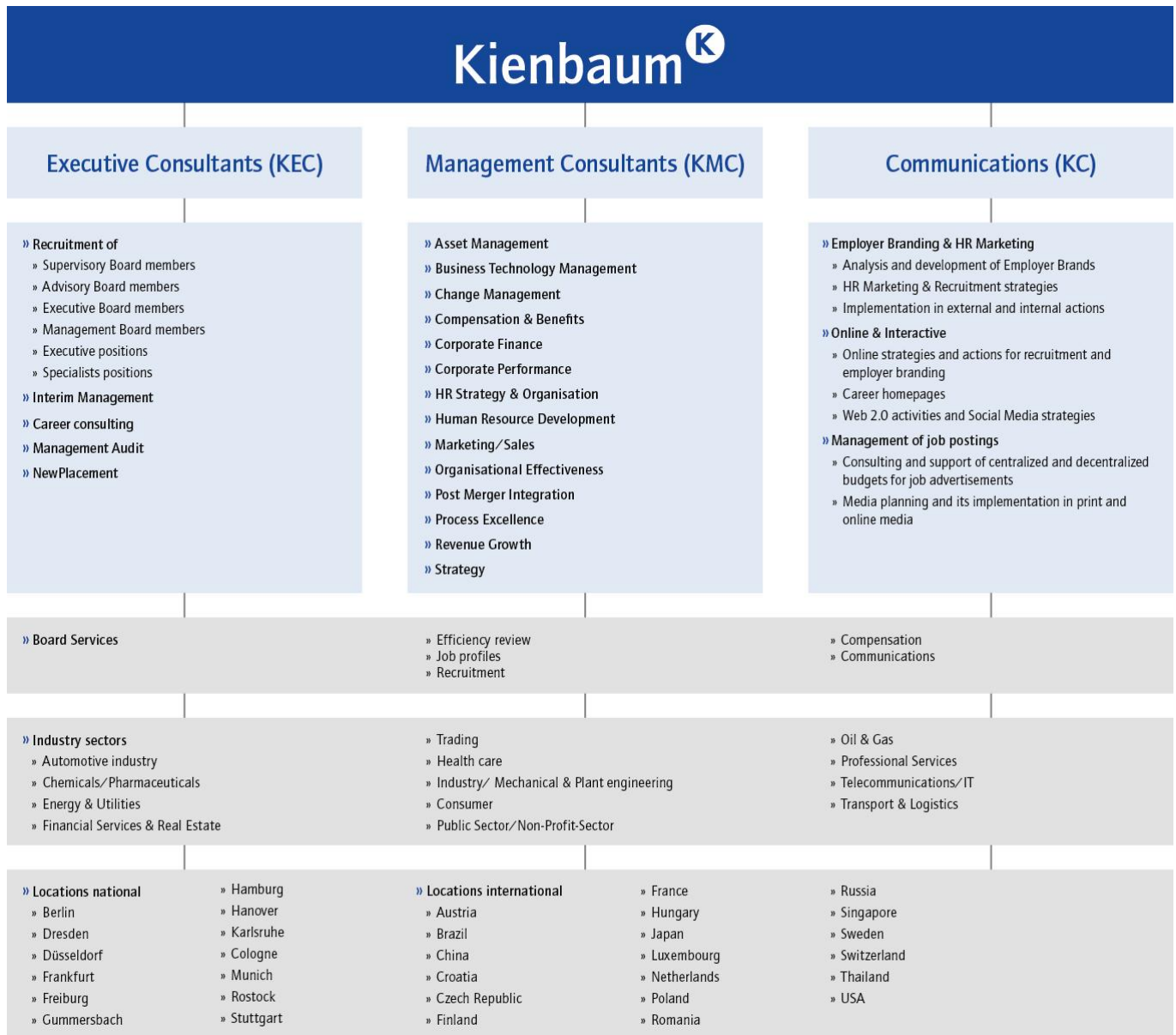
The primary starting points for optimizing HR are seen in the improvement of internal communications and HR processes. Furthermore, they see potential in increasing the added value of HR by introducing HR ratios / KPIs and in the training and qualification of HR staff.



■ 2010 ■ 2011 (expected)

* 3.3% of all participants

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