

THINK OUTSIDE.

HR budget 2010: Key tendencies

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Key HR Budget Tendencies 2009-2010

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In focus:

- Headcount
- Pay policies
- Employee Benefits

Additionally:

Employer brand & employees retention activities rating - 2010

Kelly HR policies survey

- Conducted in April 2010
- 106 companies - participants
- Total headcount > 150 000 employees

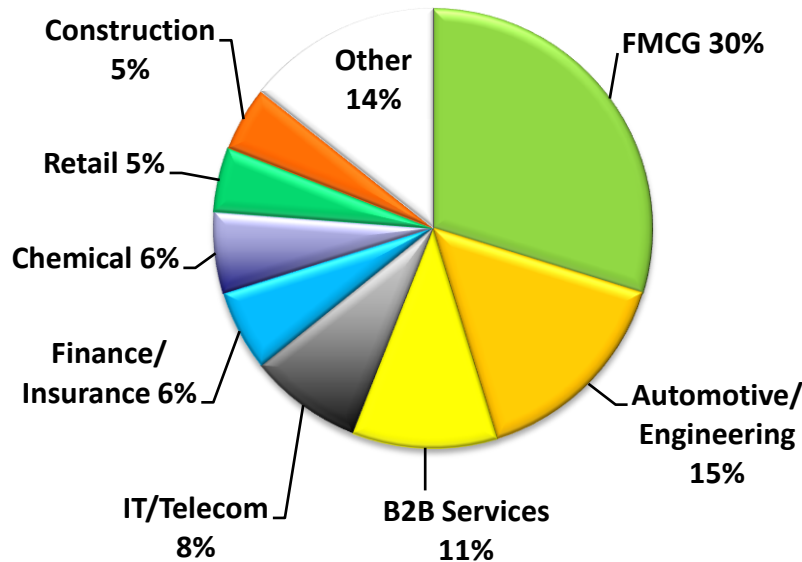
Ownership:

Russian	35%
International	65%

Headcount:

< 100	6%
100 – 1 000	58%
1 000 – 5 000	25%
5 000 – 10 000	4%
> 10 000	7%

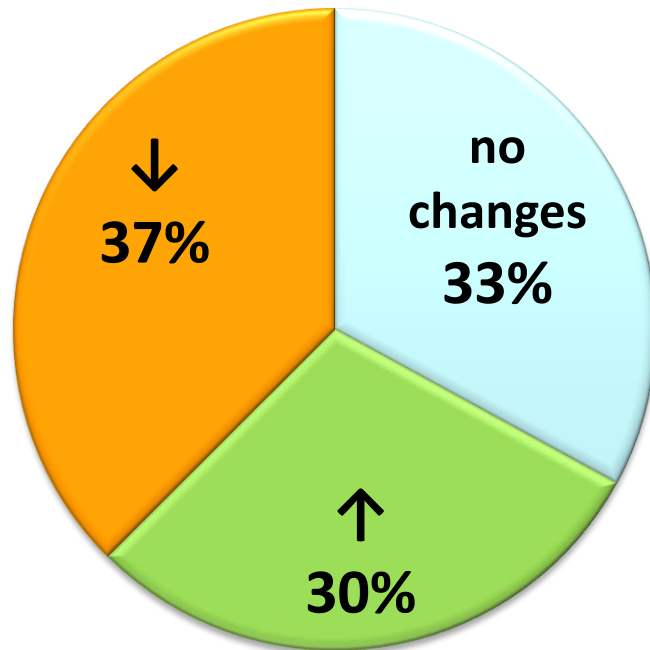
Industries



Headcount Change 2009 – 2010

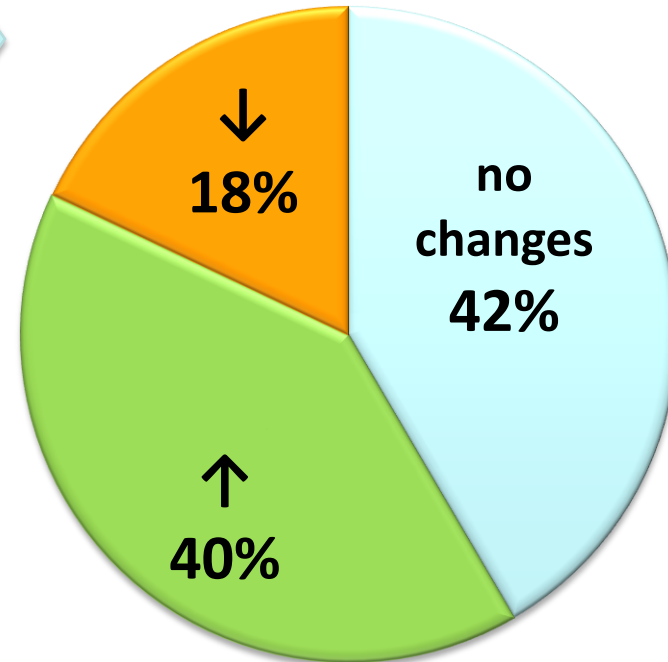
Last year actual: Q2 2009 – Q1 2010

Average Increase by 26 %
Average Decrease by 14%



Planned: Q2 2010 – Q4 2010

Average Increase by 36 %
Average Decrease by 6%

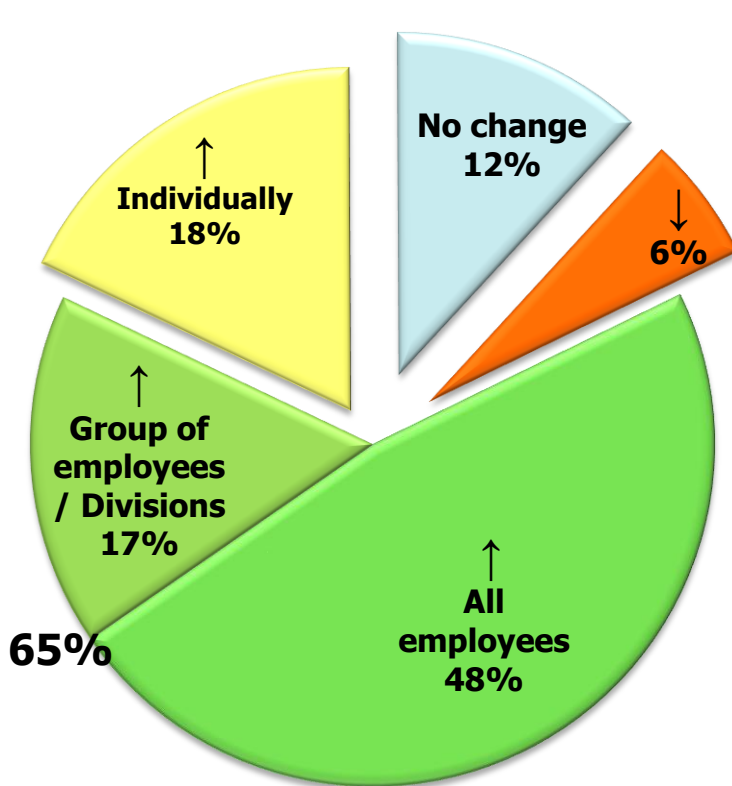


% of companies

Salary Reviews 2009 – 2010

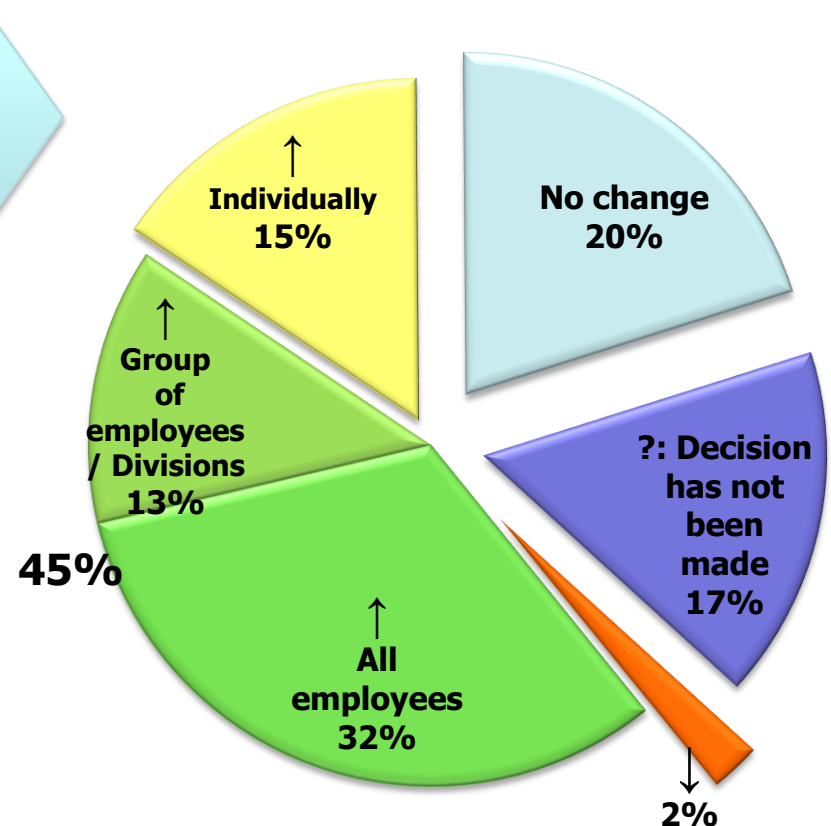
Last year actual: Q2 2009 – Q1 2010

Average Increase by **9,96 %**
Average Decrease by **11,25%**



Planned: Q2 2010 – Q4 2010

Average Increase by **8,58 %**
Average Decrease by **22,5%**



Salary Review for majority / group of the employees

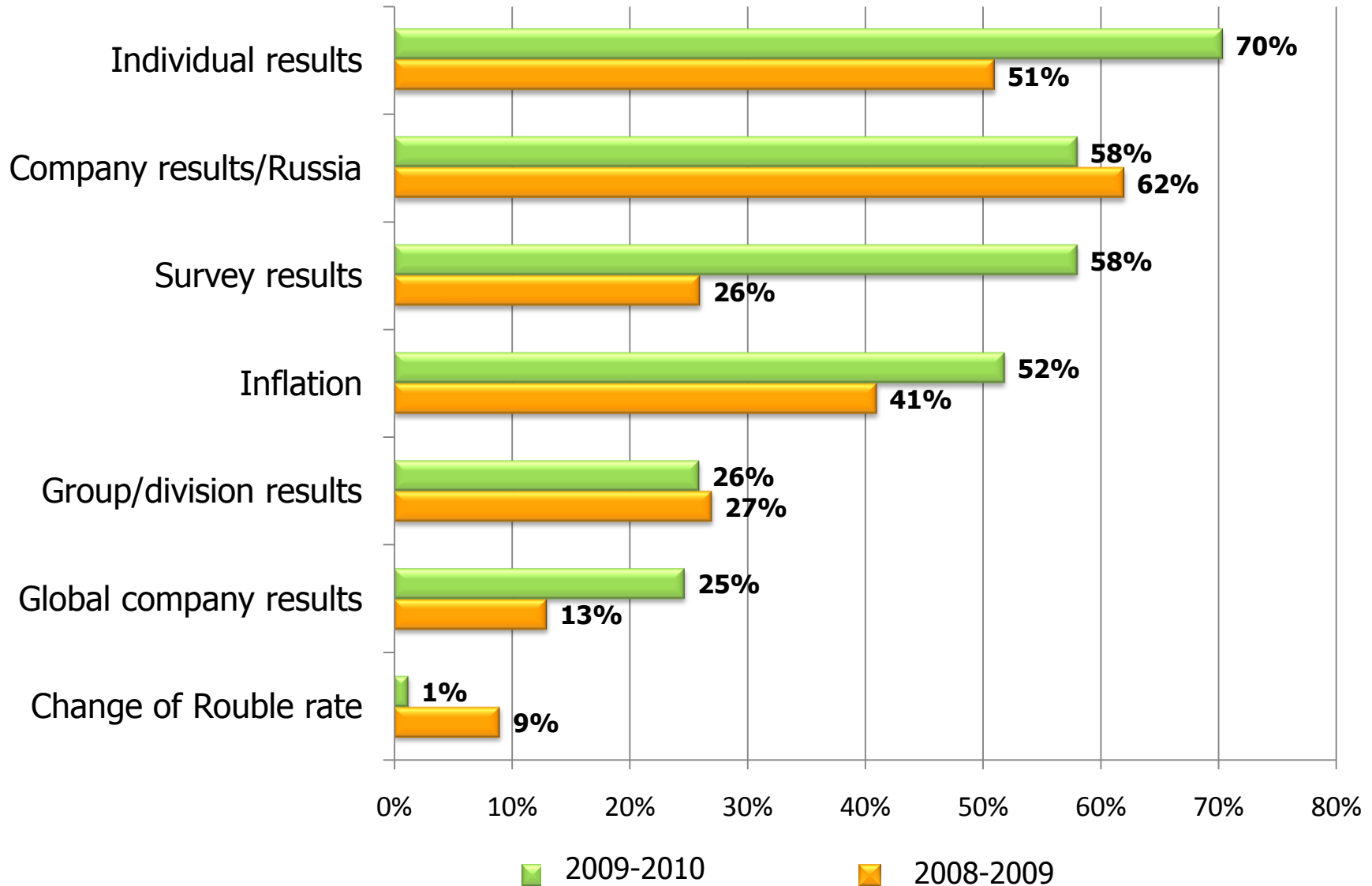
Last Year	2010 planned	%
YES	YES	33%
YES	NO	25%
NO	YES	14%
NO	NO	12%
YES	?	8%
NO	?	7%

33 % (up to 41%) companies are to have several salary increases in 2009 - 2010

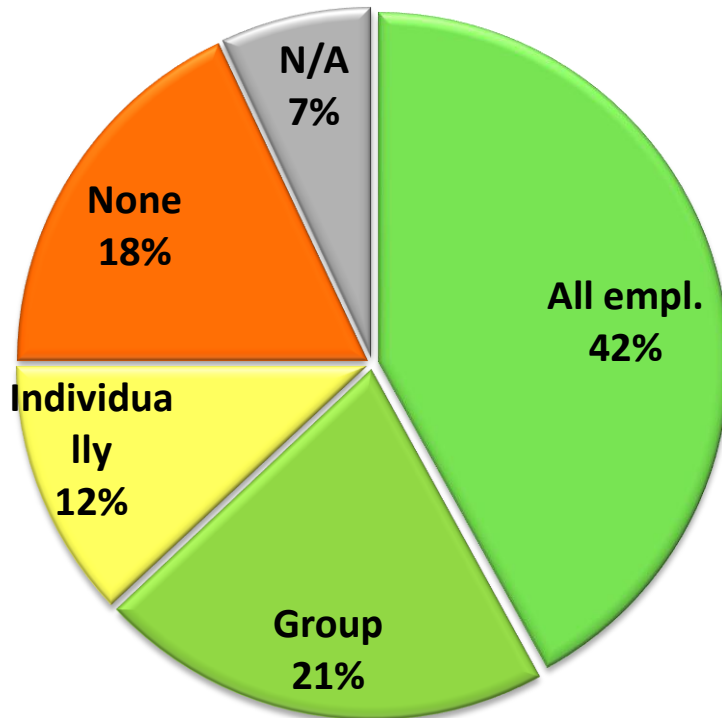
12 % (up to 19%) companies are to have no salary increases in 2009 – 2010

80 % companies increased salaries in 2009 – 2010

Salary Reviews Factors: What influences the decision

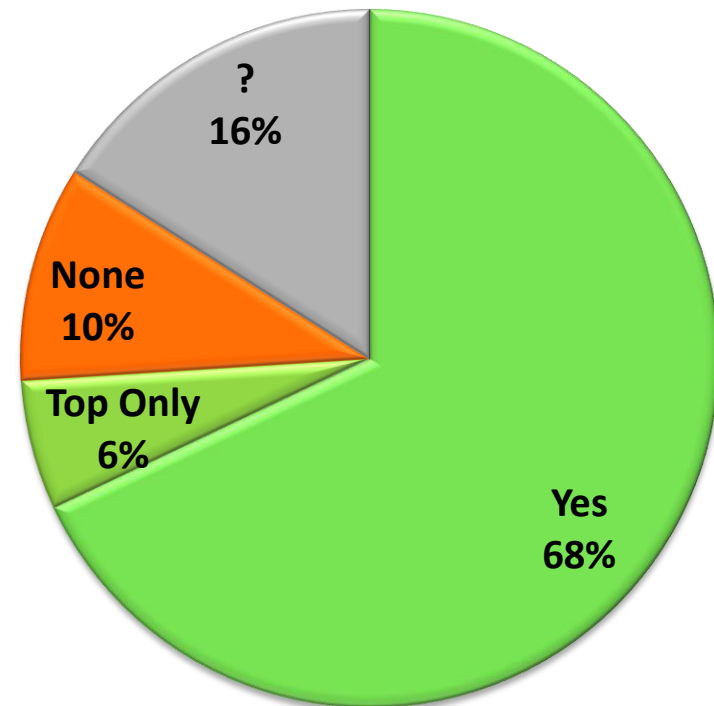


Companies who paid bonuses for 2009 results:



In 63% cases bonuses were paid to all / group of employees

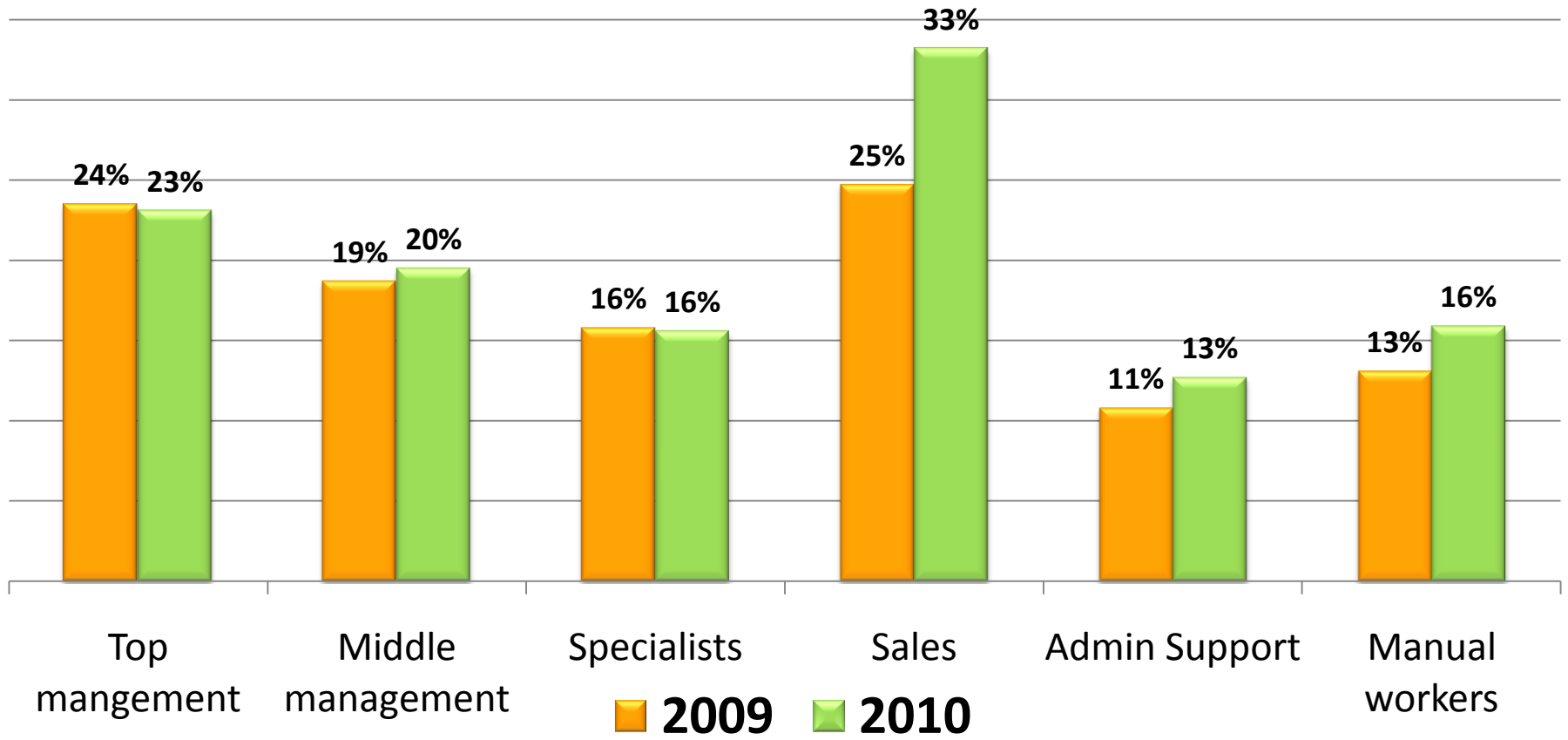
Companies planning to pay bonuses in 2010:



Bonuses are planned by 72 % of companies, 6 % will pay to managers only

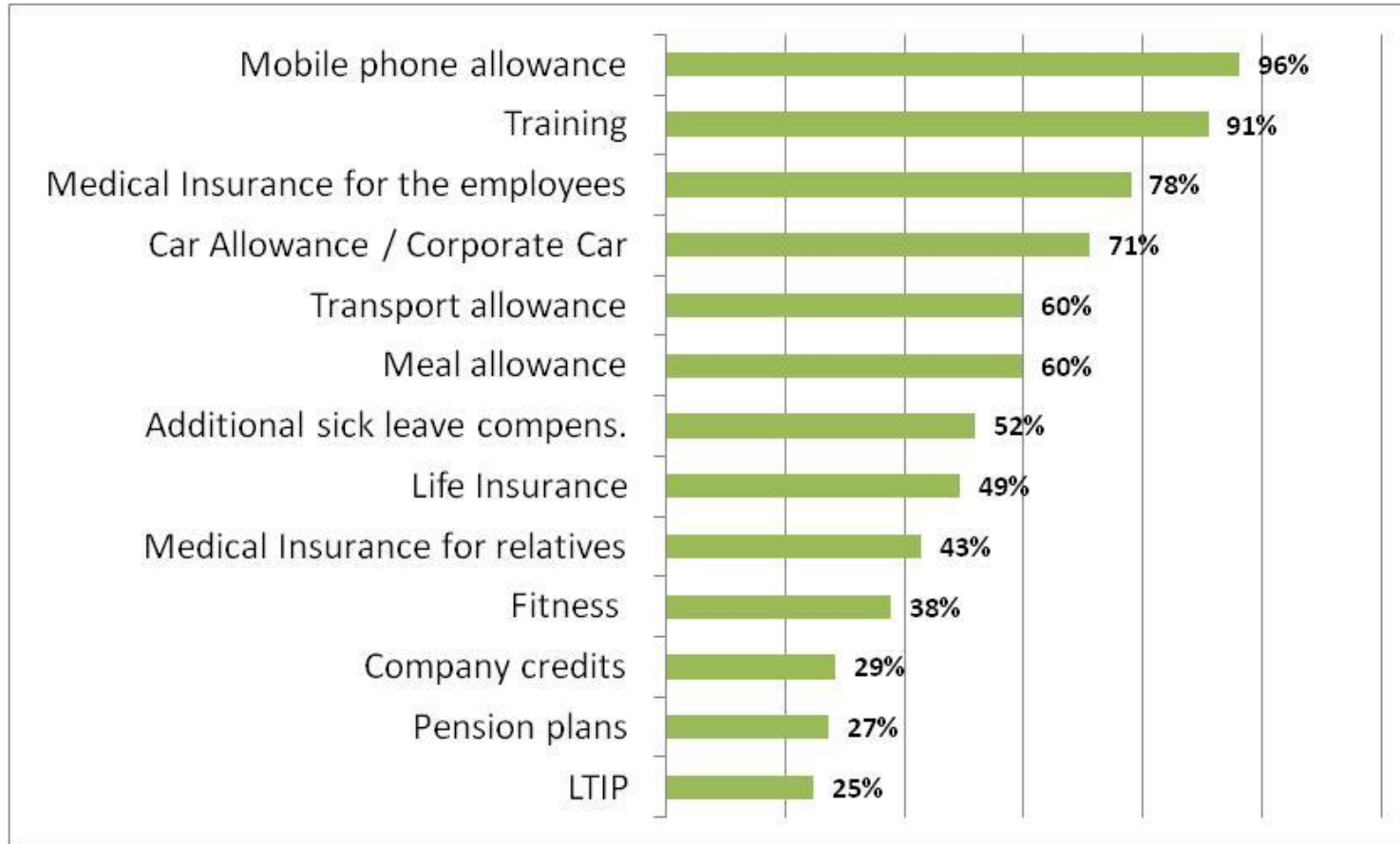
Bonuses 2009 vs. 2010

Bonuses amount as % of annual salary

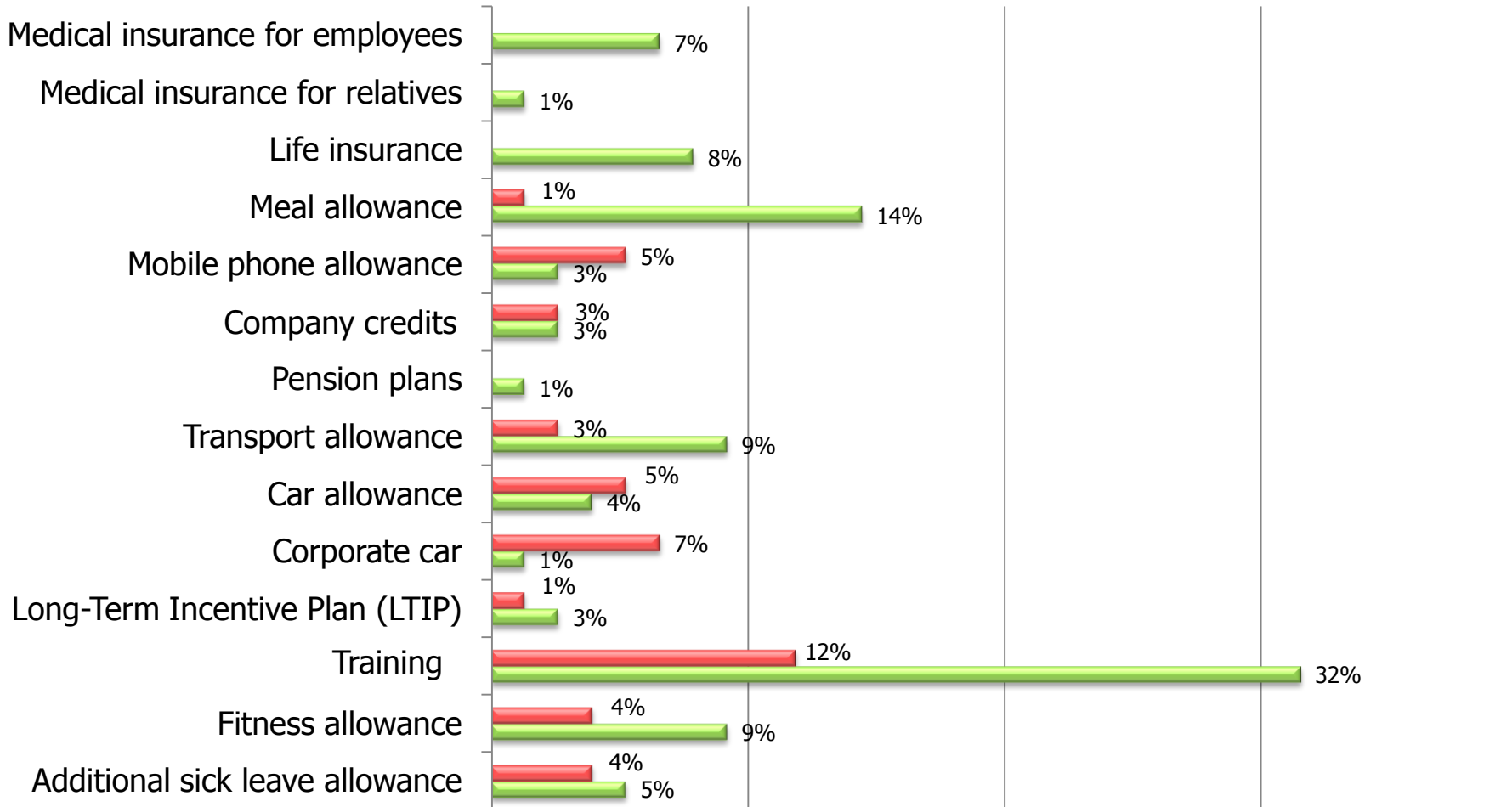


Employee Benefits in 2010

Benefits provided by % of companies:



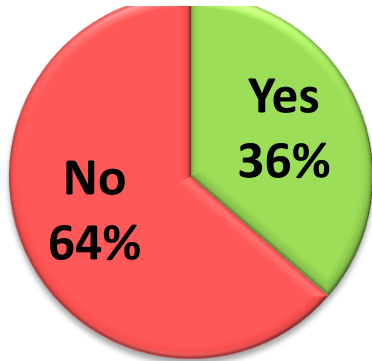
Changes in Benefits 2010 vs 2009



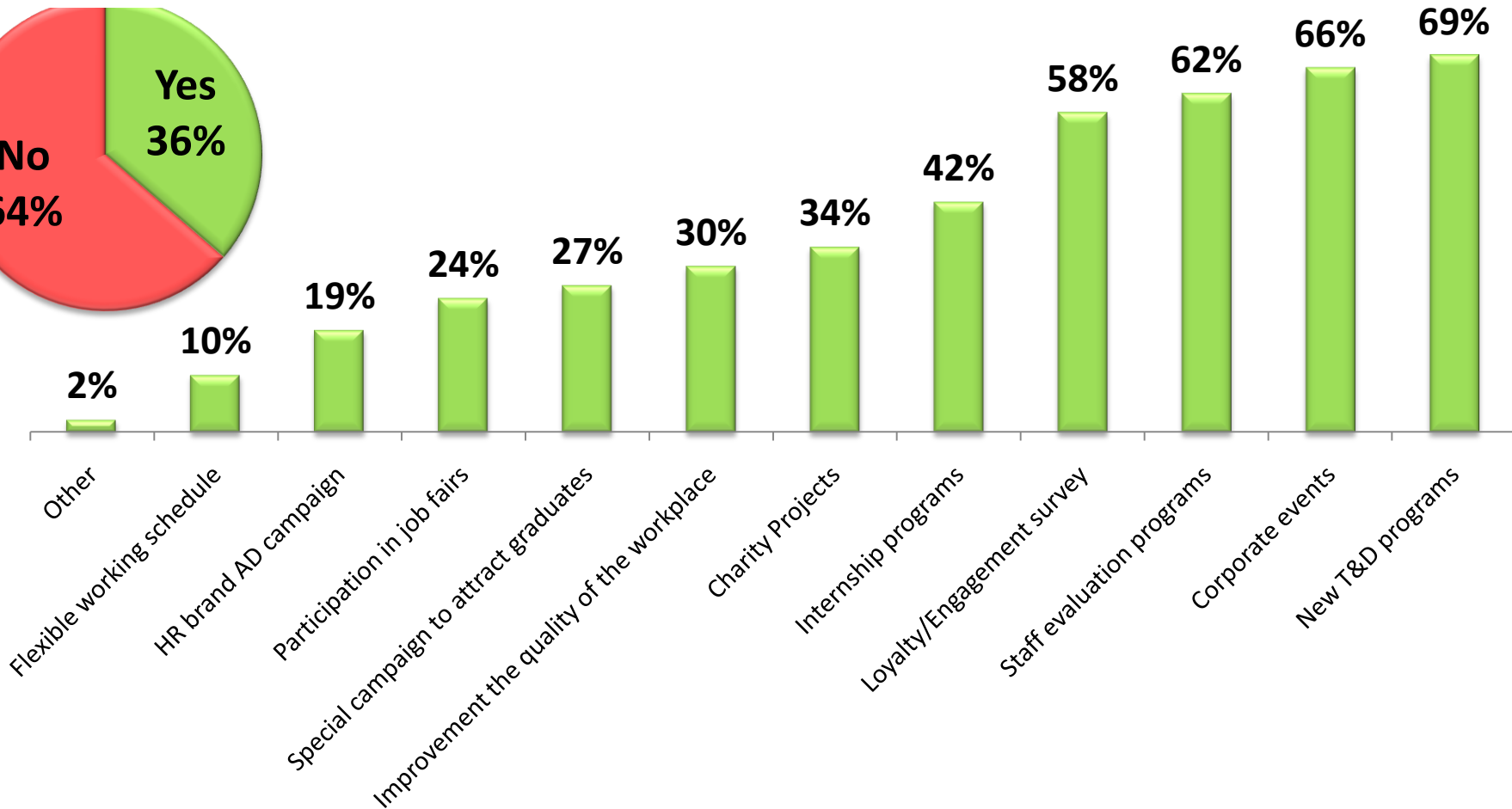
■ Budget decreased - % of companies ■ Budget increased - % of companies

HR Brand Budget and Employee retention activities

Special Budget for HR Brand:
% of companies



Employee Retention / HR Brand development activities planned for 2010: % of companies



Key Tendencies 2010 vs 2009

Salaries



Average growth – 10%

Bonuses



More companies are to pay bonuses to more employees

Benefits



Majority of benefits will remain on the level of 2009 or will be slightly increased

Headcount



Large companies still plan to optimize their structures & decrease headcount. 40% of companies will be actively recruiting and increasing their staff; voluntary staff turnover is growing

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Kelly HR Consulting

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A division of Kelly Outsourcing & Consulting Group, Kelly Services Russia

Analytical Center

- Salary & Labor Market Surveys
- Candidates Motivation & HR Brand Surveys
- Corporate Surveys: Employee satisfaction, loyalty & engagement

Assessment & Development

- Assessment & Development Centers
- Corporate competency model
- 360 degrees

Outplacement & Career Transition

- Outplacement & Career development programs:
 - Mass & group projects
 - Individual programs
 - VIP Outplacement for top managers

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Thank you!

