



HR Outlook Q1/2010

10th of June 2010, Bucharest



Research method

B2B Survey

Target population

HR Department employees and General Managers

Data collection technique

Computer Assisted Web Interviews

Sample size

229 respondents with mainly high experience in HR area. The sample is representative for the Romanian active companies in the HR field.

Fieldwork

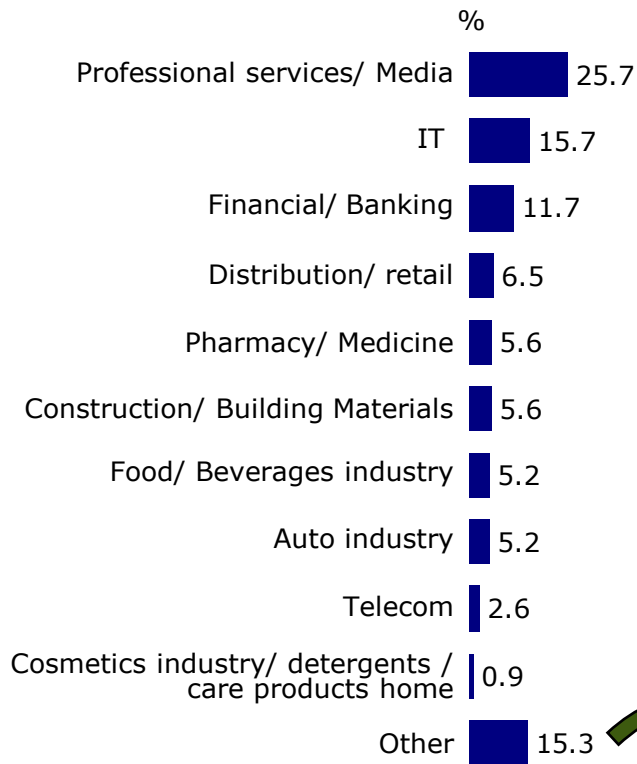
30 Apr – 14 May 2010

Sample Characteristics



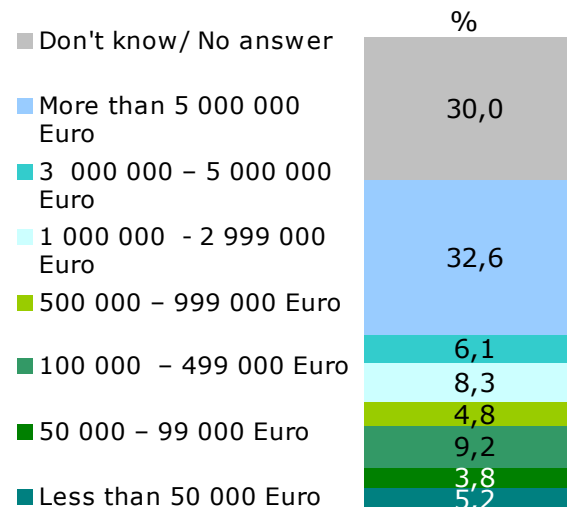
Base:
N=229

Field of activity

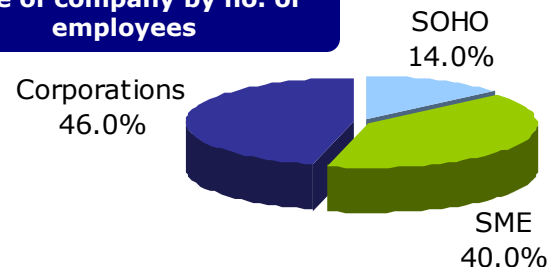


Agriculture	Energetic industry
Education	Clothes industry
Tourism/ Hotels	Industrial services

Company turnover



Type of company by no. of employees



SOHO = Companies under 50 employees
SME = Companies from 50 to 250 employees
Corporations = Over 250 employees

G6. Which field does your organization activate in?
G8. Please include your organization's turnover for last year in one of the following categories
G7. Approximately how many permanent employees does your organization have?



 Organizational Development

 Human Resources Strategy

 Learning and Development

HR Analyzed Dimensions

 Performance Management

 Legal and Industrial Relations

 Recruitment and Selection

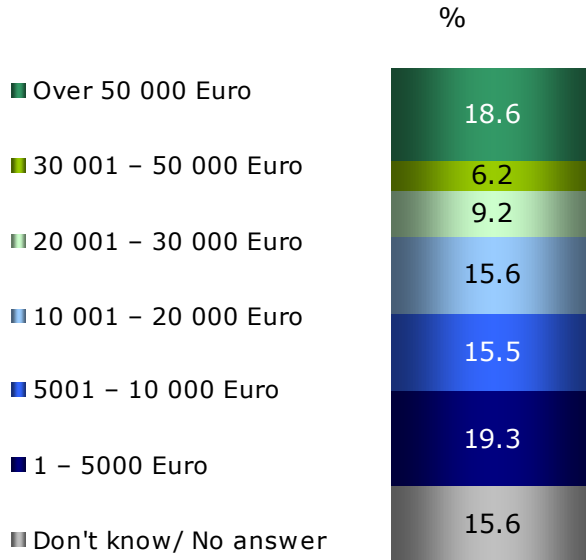
HR Budget in Q1/ 2010 and its dynamics

Human Resources Strategy

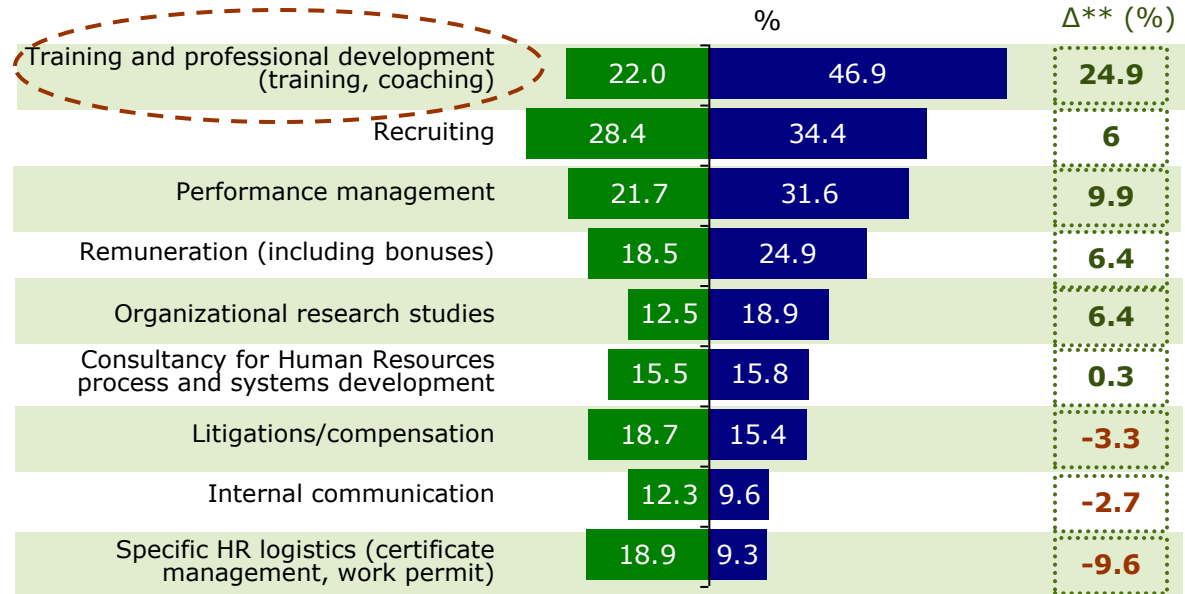


Base:
N*=32

The HR budget in Q1/ 2010



Dynamics of HR budget in Q1/ 2010 vs. Q4/ 2009



■ Has decreased ■ Has increased

**Δ = %Increase – %Decrease

*Base: Organizations who have HR budget in the 1st q/2010

B5. Approximately, what was your HR budget in the 1st quarter/2010?
 B2. For each of the following HR activities, would you say that, comparing to the 4th quarter/2009, in the 1st quarter/2010, your allocated budget has increased, remained the same or has decreased?

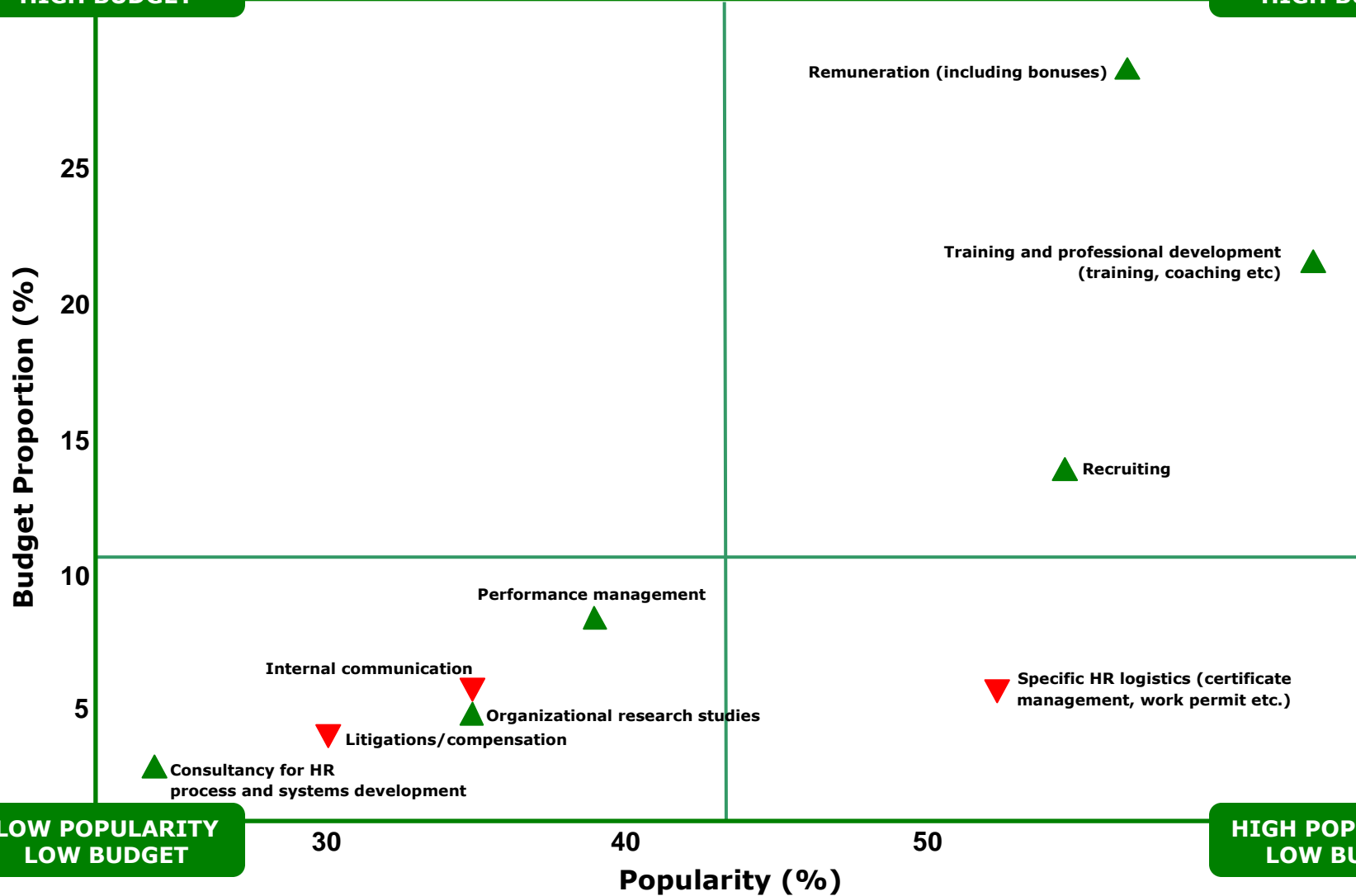
HR Budget Priorities in Q1/ 2010

Human Resources Strategy



**LOW POPULARITY
HIGH BUDGET**

**HIGH POPULARITY
HIGH BUDGET**



**LOW POPULARITY
LOW BUDGET**

**HIGH POPULARITY
LOW BUDGET**

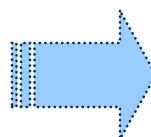
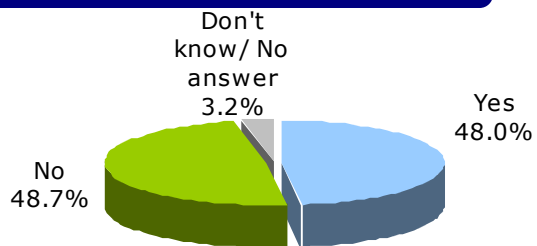
▲ ▼ Decreased/ Increased in Q1/ 2010 as compared to Q4/ 2009

Organizational Development Projects



Base:
N*=62

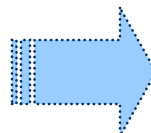
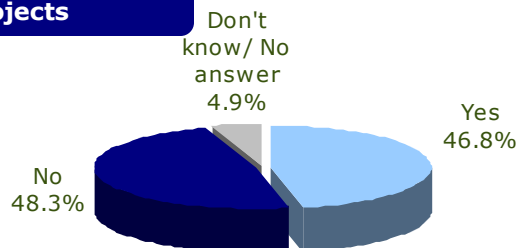
Change Management Projects



Main impacted areas (%)	N=30
HR processes	23.3
Projects of departmental reorganization	16.7
Organizational development	16.7

Base: Organizations who implemented change management projects in Q1/ 2010

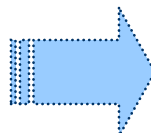
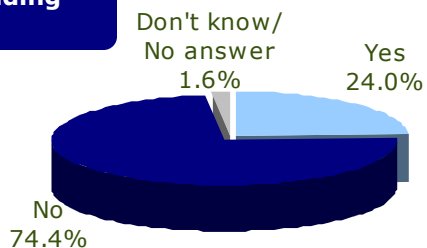
Organizational Culture Projects



Main types of projects (COUNT)	N=29
Trainings/Workshops	8
Projects for company values assimilation	7
Organizational communication /teambuilding	6

Base: Organizations who carried out projects for improving organizational culture

Employer Branding Projects



Main types of projects (COUNT)	N**=15
Specific studies	6
Students/ high school sponsorship programs	3
Internship programs	2

Base: Organizations who carried out projects to improve employer branding

*Base: Respondents that are responsible for HR strategies in their companies and who evaluated organizational development of their companies

A 1/ A6/ A11. Did you implement/initiate ... projects within your organization in the 1st quarter/2010?

A 2/ A8/ A13. Which was the most important project that you implemented within your organization in the 1st quarter/2010, regarding ...?

Learning & Development Methods Used in Q1/ 2010 (1/ 2)

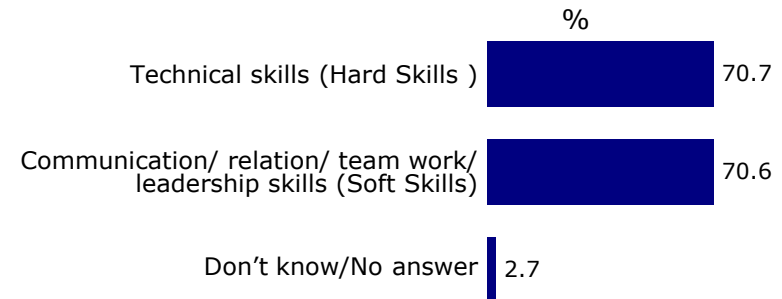


Base:
N*=75

Learning and development methods used in the organization in Q1/ 2010



Skills desired to be developed by training in Q1/ 2010

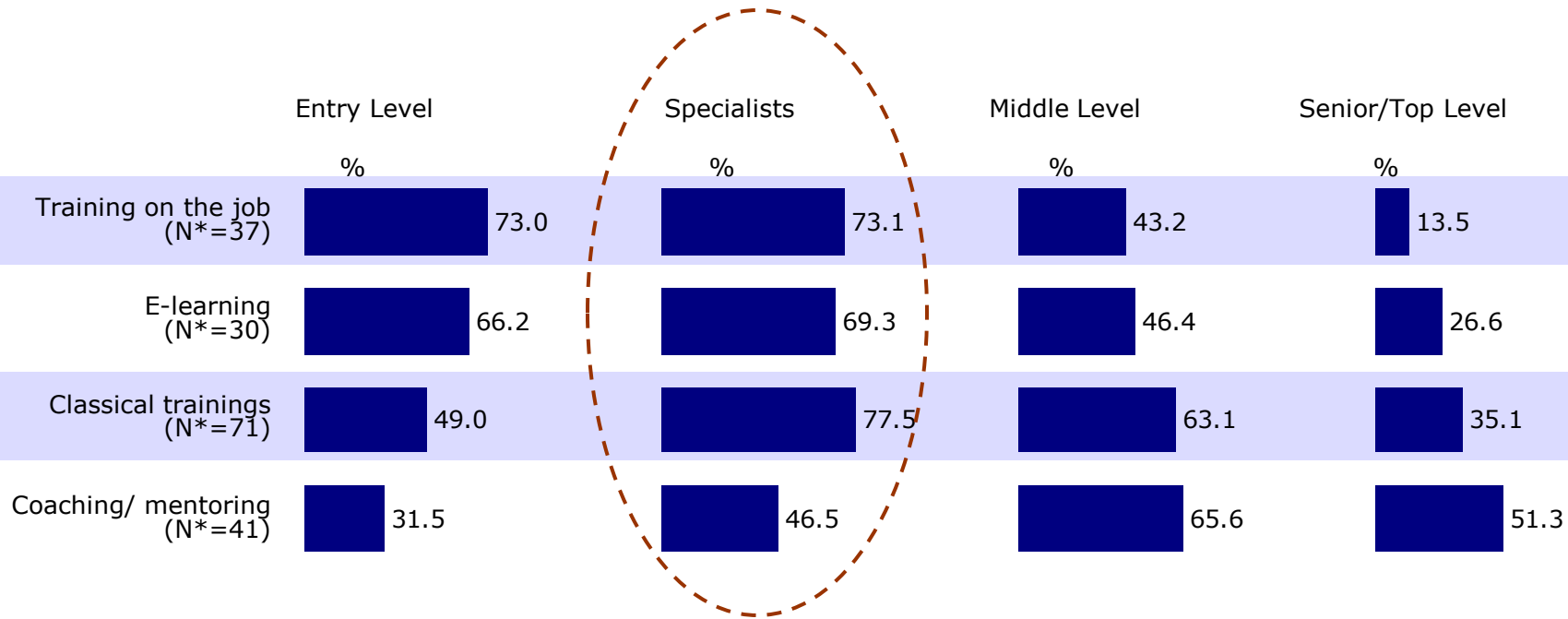


*Base: Respondents that are responsible for HR strategies in their companies and who evaluated learning and development in their companies

C3. Which of the following methods of learning and development has been used within your organization in the 1st quarter/2010?

C5. Which skills did you want to develop mostly by training in the 1st quarter/2010?

Learning & Development Methods Used in Q1/ 2010 (2/ 2)



*Base: Organizations who used this specific type of learning and development methods

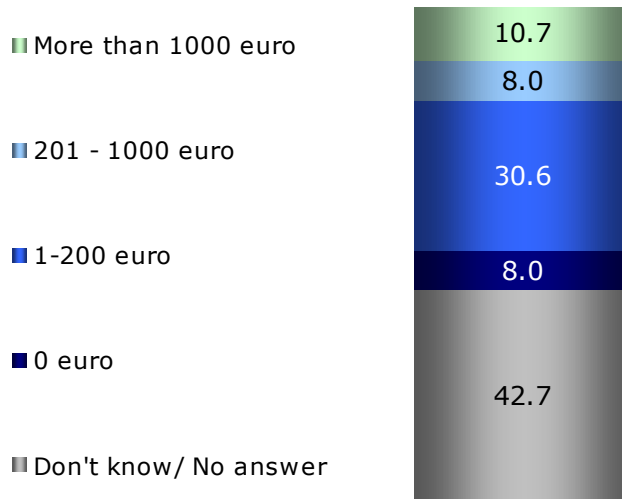
C4. For what type of employees did you organize each of these learning and development programs in the 1st quarter/2010?

Learning & Development Budget

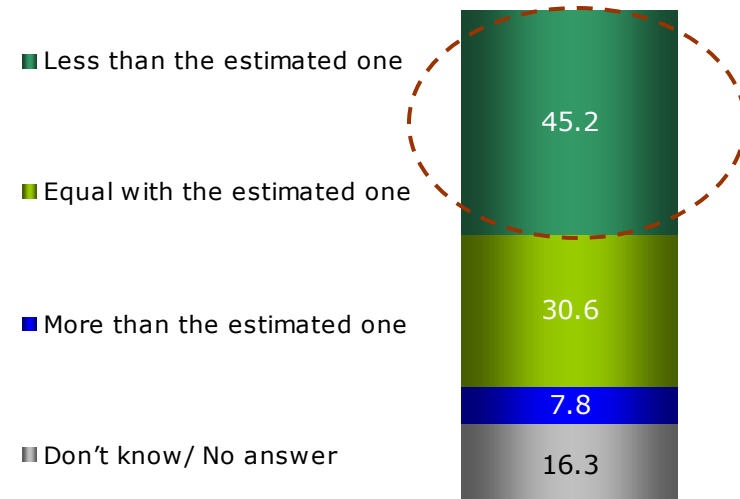


Base:
N*=75

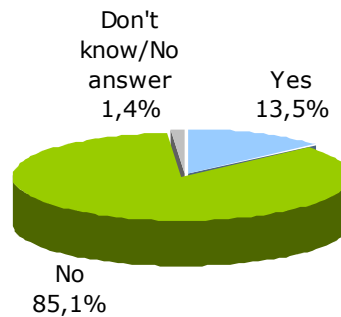
Average budget for learning and development per employee in Q1/ 2010



The actual budget for learning and development per employee in Q1/ 2010 vs. the estimated budget



Usage of external funds in Q1/ 2010



*Base: Respondents that are responsible for HR strategies in their companies and who evaluated learning and development in their companies

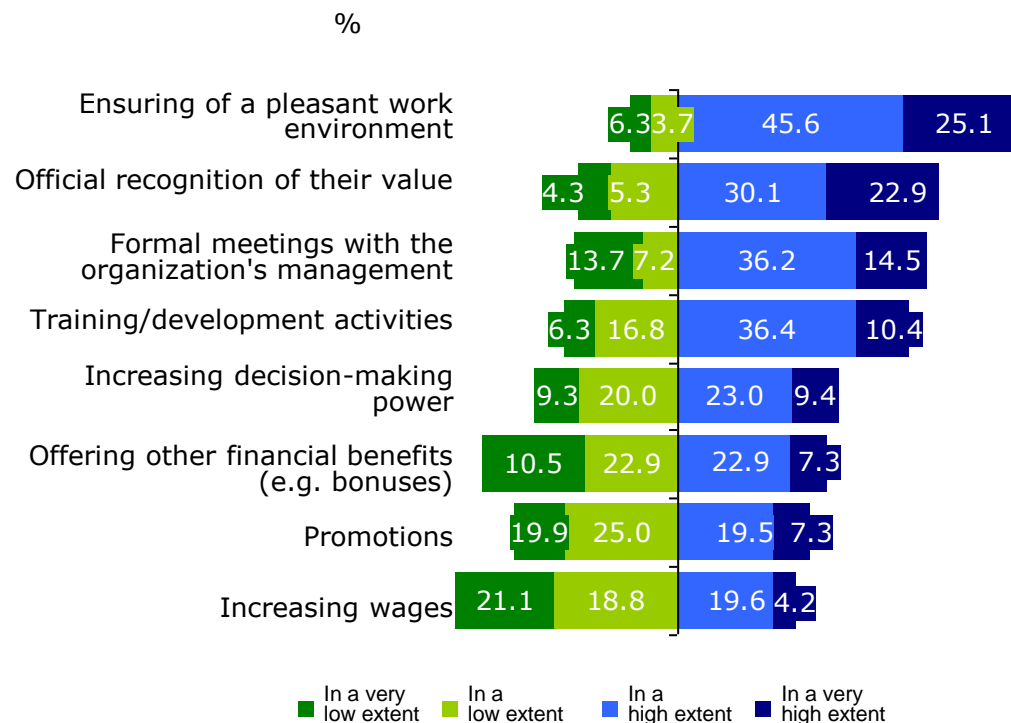
C1. What was the average budget for learning and development per employee in the 1st quarter/2010?
C2. As compared to the first estimated budget for learning and development in the 1st quarter/2010, the consumed budget per employee was....

Retention Techniques Performance Management



Base:
N*=96

Retention techniques usage in Q1/ 2010



*Base: Respondents that are responsible for HR strategies in their companies and who evaluated performance management/ compensation and benefits in their companies

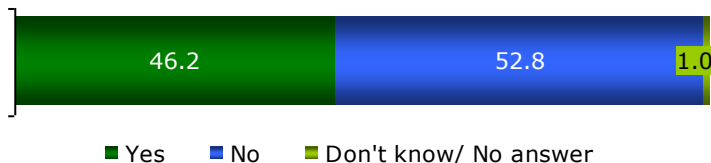
D1. How much did you use the following retention techniques in the 1st quarter/2010?
 R2. Do you use any other retention techniques within your organization?
 D9. Did you implement any performance management projects in the 1st quarter/2010?

Working from Home and Flexible Schedule Performance Management



Base:
N*=96

Working from home

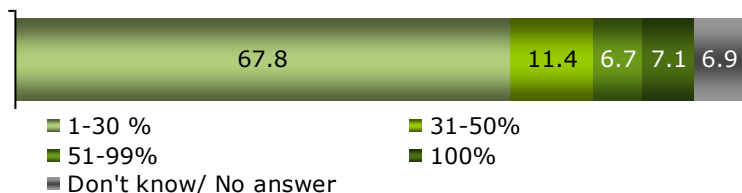


Flexible schedule



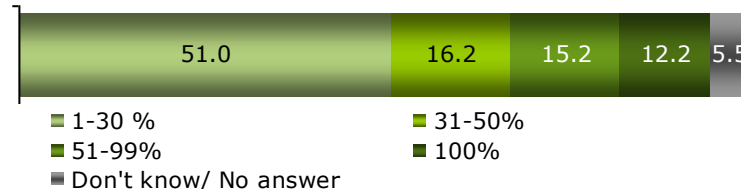
Base:
N**=44

Percentage of employees having the possibility of working from home

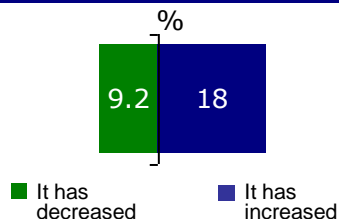


Base:
N***=74

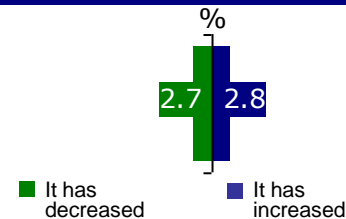
Percentage of employees having the possibility of flexible schedule



Dynamics of working from home people in Q1/ 2010 vs. Q4/ 2009



Dynamics of people with flexible schedule in Q1/ 2010 vs. Q4/ 2009



*Base: Respondents that are responsible for HR strategies in their companies and who evaluated performance management/ compensation and benefits in their companies

**Base: Organizations with employees that have the possibility to work from home

***Base: Organizations with employees that have the possibility of a flexible schedule

D2. Within your organization, are there employees who.... ?

D3. What percentage of your employees have the possibility to work from home?

D5. How did the percentage of people that work from home change in the 1st quarter/2010, comparing to the 4th quarter/2009?

D4. What percentage of your employees have the possibility of a flexible schedule?

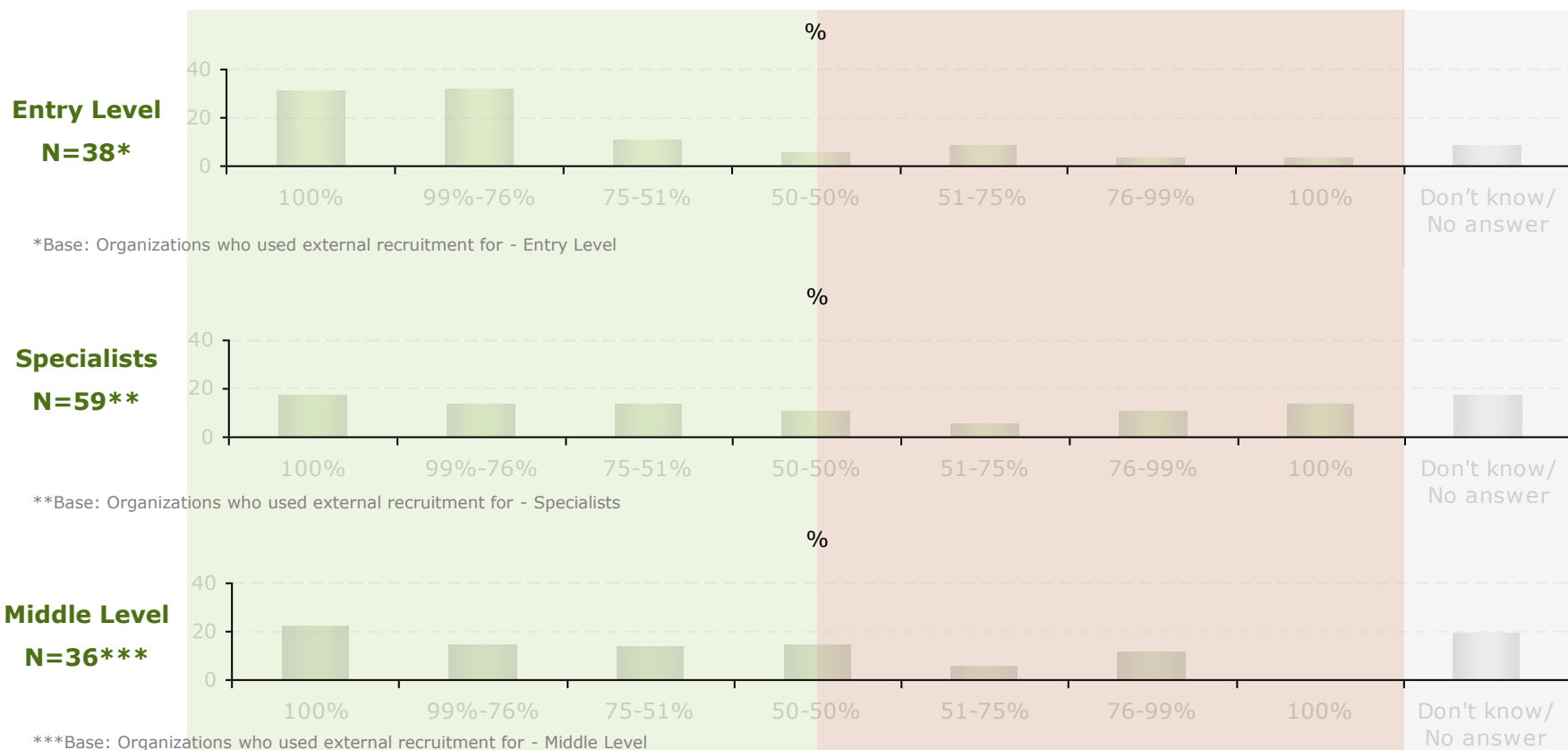
D6. How did the percentage of people that have a flexible schedule change in the 1st quarter/2010, comparing to the 4th quarter/2009?

External vs. Internal Recruitment Recruitment and Selection



External Recruiting

Internal Recruiting



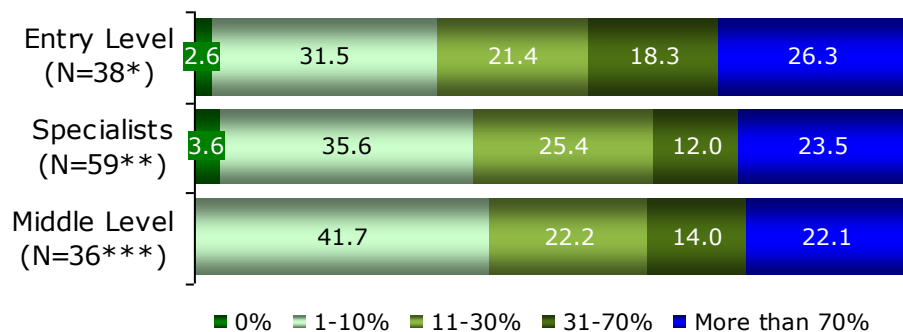
E5. In order to fill in the available entry level positions, in what percentage were the internal recruiting used and in what percentage were the external recruiting used in the 1st quarter/2010? E12. Which were the average recruiting costs for each position in your organization in the 1st quarter/2010?

Eligible CVs and Recruitment Costs

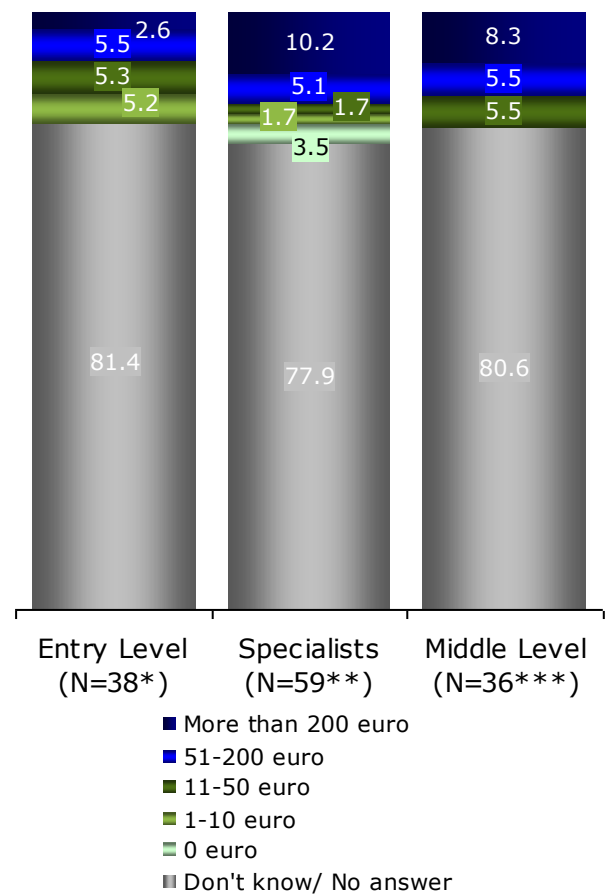
Recruitment and Selection



Percentage of eligible candidates out of total received CVs



Average recruitment costs



*Base: Organizations who used external recruitment for - Entry Level
 **Base: Organizations who used external recruitment for - Specialists
 ***Base: Organizations who used external recruitment for - Middle Level

E9. Within your organization, what percentage out of the received CVs were eligible candidates (who were selected for an interview/shortlist) for each category of open/available positions?
 E12. Which were the average recruiting costs for each position in your organization in the 1st quarter/2010?

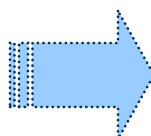
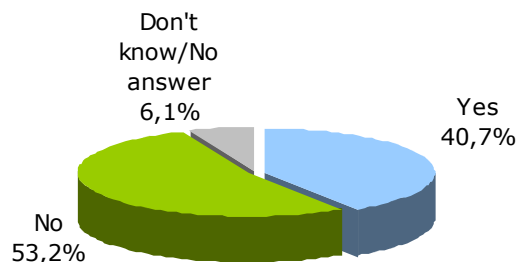
Restructuring Process

Legal and Industrial Relations



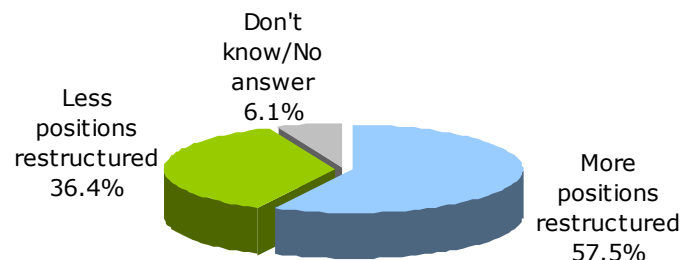
Base:
N*=81

Presence of restructuring plan in Q1/ 2010

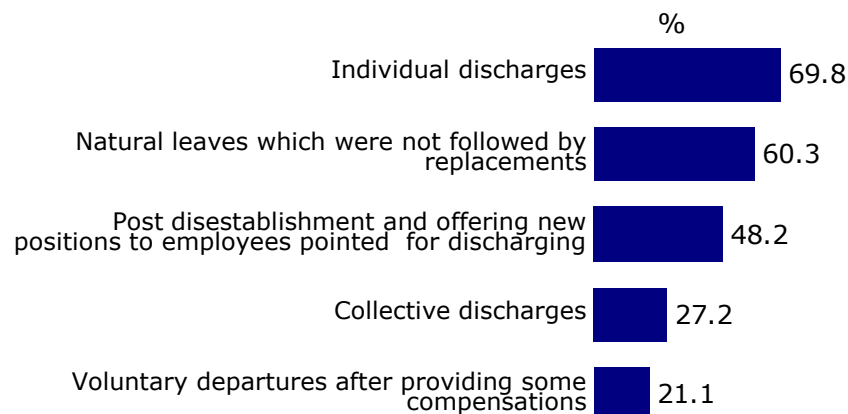


Restructuration situation in Q1/ 2010 vs. Q4/ 2009

Base:
N*=33



Used restructuring methods in Q1/ 2010



*Base: Respondents that are responsible for HR strategies in their companies and who evaluated legal and industrial relations in their companies

**Base: Organizations that had a restructuring plan

F5. Did you have a restructuring plan that involves restructuring of positions and/or reducing number of employees in your organization in the 1st quarter/2010?

F6. As compared to the 4th quarter/2009, in the 1st quarter/2010 were restructured/ eliminated....

F7. Which of the following methods have been used within your organization during the process of restructuring regarding the elimination of positions and/or reducing the number of employees in the 1st quarter/2010

Bottom line...



- **As expected, there are:**
 - more spontaneous CVs
 - cautious spending
 - more restructured positions compared with Q4/ 2009
- **Creativity is the word of the day and it is reflected in non-financial retention techniques**
- **Training is the winner of this quarter, although it is mainly in-house**
- **Could it be a new trend of working from home?**



Thank you!