

Participants in our surveys that agreed to have their company name published:

Automotive: Brose Bratislava • DURA Automotive Body & Glass Systems Components • GETRAG FORD Transmissions Slovakia • GRUPO ANTOLIN BRATISLAVA • HBPO Slovakia • INERGY Automotive Systems Slovakia • JOHNSON CONTROLS INTERNATIONAL • KIA Motors Slovakia • IAC Group (Slovakia) • Matador Automotive • Miba Steeltec • mkem • PCA Slovakia • Plastic Omnium Auto Exteriors • SAS Automotive • SEWS Slovakia • TOWER AUTOMOTIVE • VALEO SLOVAKIA • VOLKSWAGEN SLOVAKIA • Vojenský opravárenský podnik Trenčín • YAZAKI SLOVAKIA

Banking: Československá obchodná banka • Dexia banka Slovensko • HSBC Bank • ING Bank • ISTROBANKA • Komerčná banka Bratislava • Poštová banka • Slovenská sporiteľňa • Tatra banka • UniCredit Bank Slovakia • VOLKSBANK Slovensko • Všeobecná úverová banka

Car importers: Kia Motors Sales Slovensko • MIKONA • Summit Motors Bratislava • PEUGEOT SLOVAKIA • TEMPUS AWT BAVARIA • TOYOTA MOTOR SLOVAKIA

Electrical Engineering: DELIPRO • Delta Electronics (Slovakia) • ELEKTRONIKA SLOVENSKO • GE Inspection Technologies • Power-One • Yazaki Wiring Technologies Slovakia

Utilities: Dalkia • KLF-ENERGETIKA • NAFTA • Slovenská elektrizačná prenosová sústava • Slovenské elektrárne • Slovenský plynárenský priemysel • SLOVNAFT • Stredoslovenská energetika • TRANSPETROL • VUJE • Východoslovenská energetika • Západoslovenská energetika

Express transport: DHL Express (Slovakia) • KUEHNE + NAGEL • Rhenus Logistics • SCHENKER • TNT Express Worldwide

Pharmaceuticals: Abbott Laboratories Slovakia • Benela • Boehringer Ingelheim Pharma • Delpharmea Nutraceuticals SK • EGIS SLOVAKIA • Evonik Fermas • GlaxoSmithKline Slovakia • Merck • Phoenix Zdravotnícke zásobovanie • Roche Slovensko • S&D Pharma Limited • sanofi-aventis Pharma Slovakia • SERVIER SLOVENSKO • Schering Plough • Central East AG • TEVA Pharmaceuticals Slovakia • Zentiva

Hotels: Apartmány • Hotel Boboty • Hotel Lesná • SEBA, Senator Banquets

ICT: Adatastra • Advanced • Anasoft APR • Beset • CEGEDIM SK • CQ service • CSA Systems • DelCom Slovakia • Dell • ELCOM • FINESOFT • FREQUENTIS • GAMO • IBM Slovensko • ICL Slovakia (Fujitsu Services) • IPESOFT • itelligence • Oracle Slovensko • PosAm • s IT Solutions SK • S&T Varias • Siemens Program and System Engineering • Slovak Telekom • Slovanet • SMS Slovakia • Softect • SOITRON • Sun Microsystems Slovakia • Tecton • Telenor Slovakia • Tempest • T-Mobile Slovensko • Tronet • Unisys Slovakia • VNET • Whitestein Technologies

Trade and distribution: AGA GAS • ALFA LAVAL Slovakia • AVON Cosmetics • BUDERUS Vykurovací technika • Castrol Slovensko • CARRIER TRANSICOLD SLOVAKIA • COMPEL • DISKUS • DSI Slovakia • EUROPAPIER-SLOVAKIA • HEIDELBERG Slovensko • Heineken Slovensko Distribúcia • Hilti Slovakia • IKEA Bratislava • Jungheinrich • Konica Minolta Slovakia • KONTURA • LEGRAND Slovensko • NAY • Organon Slovakia • ORIFLAME SLOVAKIA • PARKETT PLUS • Phoenix Zeppelin • Samsung Electronics Magyar • SCANIA SLOVAKIA • ŠKODA AUTO Slovensko • ST. NICOLAUS - trade • Syngenta Slovakia • Toyota Material Handling Slovensko • VELUX SLOVENSKO • Volvo Truck Slovak • WÜRTH International Trading

Insurance: Allianz • Slovenská poisťovňa • AMSLICO AIG Life poisťovňa • APOLLO zdravotná poisťovňa • Česká poisťovňa - Slovensko • ČSOB Poisťovňa • DÓVERA zdravotná poisťovňa • ING Životná poisťovňa • Poisťovňa Slovenskej sporiteľne • Union poisťovňa • Union zdravotná poisťovňa

FMCG: Coca-Cola HBC Slovenská republika • DANONE • HARTMANN-RICO • Heineken Slovensko • I.D.C. Holding • Imperial Tobacco Slovakia • Kysucké pekáreň • Milex Galanta • Mraziarne • PALMA-TUMYS • PEPSI-COLA SR • RAJO • Slovenské cukrovary • SYRÁREŇ BEL SLOVENSKO • Tento

Manufacturing: ABB • ALYA • AMYLUM SLOVAKIA • BAUMIT • BC TORSION • Calmit • Cementáreň Lietavská Lúčka • COMPEL • Continental Matador Truck Tires • CROWN Packaging Slovakia • Duropack Turpak Obaly • DOKA DREVO • ELBA • ELEKTROKARBON • ELV PRODUKT • Florida • Gabor Slovensko • GRAFOBAL • Heineken Slovensko Sladovne • Holcim (Slovensko) • Honeywell • CHEMOSVIT • Icopal • Imperial Tobacco Slovakia • Johns Manville Slovakia • JOHNSON CONTROLS INTERNATIONAL • KINEX • KINEX-KLF • Kraft Foods Slovakia • LARF NOVA • LIGAREX • MAHLE Engine Components Slovakia • MATADOR • MERINA • MOLTES • MRAMOR • NAFTA • Novácke chemické závody • OBUV ŠPECIÁL • PFS • Philip Morris Slovakia • Plastic Omnium Auto Exteriors • Považské strojárne LETECKÉ MOTORY • PPC Cab • PYROBATYS • Refrako • Sauer-Danfoss • Semecs • SHP Harmanec • SLOVKORD • Slovpack Bratislava • Sperian Protection Slovakia • Služba Plastohm • Swedwood Slovakia • TATRACHEMA • TATRAVAGÓNKA Poprad • TRIM LEADER • Vogel & Noot Seed Solutions • VSH Consult • VSŽ Inžiniering • VUNAR • Východoslovenské stavebné hmoty • Wienerberger • Slovenské tehelne • ZTS Strojárne • ZVS holding • ŽOS Trnava

Services: British Council • DEDÁK & Partners • IURA Edition odštepny závod COMPRIS software

Mechanical Engineering: Danfoss Compressors • ELBA • Elster • Embraco Slovakia • HACO • Hriňovské strojárne • Marel Food Systems • PASTORKALT • TATRAMAT - ohrievače vody

Television Companies: Devínskonovoveská televízia • MAC TV • Slovenská produkčná • Slovenská televízia • S - Team

Medical Facilities: CTMR - Pracovisko magnetickej rezonancie • Dr. Magnet • Eurocord - Slovakia, Slovenský register placentárnych krvotvorných buniek • Kúpele Nimnica • Medicína • MR Prešov • PRO BIOS, neštátna poliklinika

Others: Accor Services Slovakia • A.S.A. Slovensko • Birkart Globalistics SK • Consumer Finance Holding • ČSOB Leasing • DHL Express Slovakia • Direct Parcel Distribution SK • HTC holding • Euromedia • J&T FINANCE GROUP • OTP Leasing • Portfin • Profesia • REDING • Ringier Slovakia • Slovak Parcel Service • Sembera Vanák/FCB and others.

We will be pleased to provide you with further details about the survey.

PricewaterhouseCoopers
Human Resource Services

Námestie 1. mája 18, 815 32 Bratislava
Tel.: +421 2 5935 0111, Fax: +421 2 5935 0222

Tatiana Spišáková
Roman Tóth
Oldřich Vaňous
Branislav Hunčík

Email:
tatiana.spisakova@sk.pwc.com
roman.toth@sk.pwc.com
oldrich.vanous@sk.pwc.com
branislav.huncik@sk.pwc.com

www.pwc.com/sk
www.saratogapwc.com



Human Resource Benchmarking

Impact of Economic Crisis on HR Management

Database of Key HR Indicators focused on

Diagnosis of Human Resources Management

2009

HR Benchmarking survey offers a transparent and practical connection between human capital performance indicators and the company's financial results. Every year we monitor the situation at the Slovak market in the field of human capital management and we assess mutual influence of indicators which diagnose the company's competitiveness in the HR area. HR Benchmarking is a unique study that will help you identify weaknesses in HR management and set priorities for improvements.

Database of Key HR Indicators

Almost 100 indicators (KPI) in the HR management area, connected to the performance of the whole company.

Areas of analysis:

Corporate results

- indicate whether employees are really a competitive advantage for the company, and whether they are the basis for any considerations of priorities in the HR management of the given company
- determine the return on investments into human resources

Examples of indicators:

- Turnover, costs, and profit per employee
- Labour productivity and HR Added-Value Index (Return on Investment)

Behaviour within the organization

- reflects the extent of involvement or loyalty of employees
- refers to the relationship between the absence rate and the company costs

Examples of indicators:

- Employee turnover
- Reasons for terminating employment
- Absence
- Monitoring employees' motivation and satisfaction

Remuneration and employee benefits

- identify the competitiveness of remuneration packages
- help determine remuneration and employee benefit policies

Examples of indicators:

- Remuneration costs
- Remuneration structure
- Remuneration strategy
- Market position in remuneration
- Salary increases
- Variable salary component
- Employee benefits

Recruitment and selection

- measures both the effectiveness of the recruitment process and how potential candidates perceive the company
- refers to the attractiveness of the employer on the labour market

Examples of indicators:

- Internal and external recruitment
- Cost of filling one vacant position
- Time spent with the recruitment process
- Success rate in filling vacant positions
- Cost of recruiting graduates

Training and development

- determines what importance companies assign to the training and development of their employees by the level and structure of investments in employee development

Examples of indicators:

- Induction training
- Training costs
- Time spent on training
- Training penetration
- Types of training
- External and internal training
- Talent mobility

Organizational structure

- analyses the number of staff in individual HR units, the total costs of the HR department, its structure, and the number of outsourced activities

Examples of indicators:

- FTEs per HR department FTE
- HR department costs
- Average HR remuneration
- Outsource rate

Diagnosis of Human Resources Management

Will help you answer the following questions and identify areas of possible improvement:

- How do HR processes contribute to achieving corporate targets?
- How to measure effectivity and productivity of HR capital?
- What are the company's priorities in HR management strategy?
- What are the methods, costs, concepts, and best practice in all HR management areas: Recruitment and Selection, Performance Evaluation, Remuneration, Training and Development, HR Strategy, Retaining Staff, Motivation and Satisfaction, and Managing Absence?
- What indicators are to be used in HR management and HR controlling?
- To what extent do companies outsource HR services?
- What are the reasons for employee turnover?

Outputs

Indicators are analysed by the following categories:

- Sectors
- Entire Slovak Market
- Company Size
- Turnover Growth of the Company
- Job Categories

HR Benchmarking Outputs are available on a CD-ROM in both Slovak and English. Full-scope outputs include:

Final Report

- a complete analysis of almost 100 key HR indicators (KPI)
- a comparison to the market and the sectors available
- clearly arranged graphical and tabular illustration of quantitative and qualitative data
- an overview of all indicators, including the method of their calculation
- a specific analysis of TOP 20 companies, describing their differences from other companies in the HR management level.

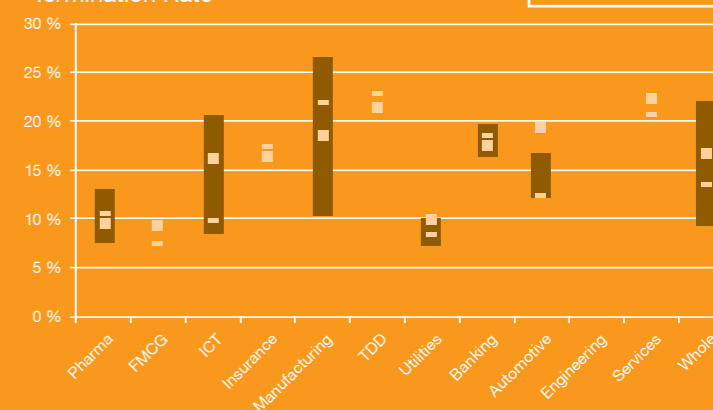
HR Scorecard

- report on personal management
- includes selected indicators and may serve as the main report on HR management for the company top management
- allows comparing your internal set-up of the HR management system to market results.

Termination Rate

Industry	10th Percentile	Lower quartile	Median	Upper quartile	90th Percentile	Mean	Number of Companies
Pharma	3.4%	7.6%	10.6%	12.9%	14.8%	9.6%	6
FMCG	-	-	7.5%	-	-	9.3%	3
ICT	5.8%	8.5%	9.8%	20.5%	23.5%	16.2%	11
Insurance	-	-	17.0%	-	-	16.6%	3
Manufacturing	6.5%	10.4%	21.7%	26.4%	29.1%	18.6%	11
TDD	-	-	22.7%	-	-	21.4%	4
Utilities	6.2%	7.2%	8.5%	10.1%	15.2%	10.0%	6
Banking	13.8%	16.3%	18.1%	19.6%	21.4%	18.0%	7
Automotive	-	12.1%	12.3%	16.7%	-	19.3%	5
Engineering	-	-	-	-	-	-	1
Services	-	-	20.5%	-	-	22.3%	3
Whole Sample	6.5%	9.2%	13.5%	21.9%	28.4%	16.6%	63

Termination Rate



HR Scorecard									
View:	Whole sample	D1	Q1	Median	Q3	D9	Your company	Ratio	
FINANCIAL									
Revenue	1 519 768	2 644 952	5 858 387	12 770 443	21 607 483	5 800 000	99%	0	
Operating Profit	1 337 012	2 317 402	5 294 087	10 739 101	20 966 373	5 200 000	98%	0	
Profit before tax	-1 248	85 467	264 500	864 229	1 982 197	600 000	227%	0	
INTERNAL BUSINESS PROCESS AND PRODUCTIVITY									
Revenue per employee	2.8%	4.9%	10.1%	22.3%	34.1%	4.9%	49%	0	
Operating Profit per employee	299 608	458 503	572 766	817 856	1 086 624	488 900	85%	0	
Profit before tax per employee	87.7%	93.0%	96.5%	98.3%	99.2%	96.0%	99%	0	
Revenue per employee	3 608	7 072	22 181	54 769	93 832	22 400	101%	0	
Operating Profit per employee	22 795	32 248	43 721	61 727	88 344	34 000	78%	0	
Profit before tax per employee	0.50	0.72	1.02	1.24	1.48	0.91	89%	0	
Revenue per employee	7.0%	11.7%	15.1%	22.1%	33.1%	5.8%	38%	0	
Operating Profit per employee	0.92	1.16	1.53	2.44	3.73	1.22	80%	0	
Profit before tax per employee	1 352	4 344	17 264	47 067	119 121	15 600	90%	0	
INTERNAL CUSTOMERS									
Customer Satisfaction	11.7%	17.1%	31.7%	66.3%	74.7%	33.0%	104%	0	
Customer Retention	0.26	0.40	0.88	1.76	3.11	1.90	216%	0	
Customer Loyalty	12.2%	19.8%	39.3%	71.3%	88.9%	43.0%	109%	0	
Customer Engagement	19	35	53	130	176	152	287%	0	
Customer Churn	0.7%	1.3%	2.6%	3.6%	5.9%	3.1%	125%	0	
Customer Satisfaction	2.9%	6.1%	11.5%	16.2%	22.9%	6.5%	57%	0	
Customer Retention	6.5%	9.2%	13.5%	21.9%	28.4%	22.3%	165%	0	

Our approach and methodology

Saratoga

An empirically proved model for measuring performance in HR management, based on data from 20,000 companies.

Security of data transmission

Each participant is assigned a special, multi-character code and questionnaires are protected by a user password. All data in the database is processed anonymously.

Professional assistance

Our professionals are available for consultations, and ensure the correctness and homogeneity of data.

A user-friendly questionnaire

For data collection, participants receive an electronic questionnaire in Microsoft Excel format, containing hints, a guide, and explanations of individual terms.

Timetable and data collection

