



Leonardo Sforza | Brussels | 24 February 2010

5th European HR Barometer Trends and Perspectives 2010–2012

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HR Barometer's Objectives

- Address Pan-European Issues on People Management Policies and Practices
- Gain Business Insight on HR:
 - Business Prospects, Achievement and New Actions Taken To Face Downturn
 - Policy Drivers and Priorities
 - Impact, Performance, and Gaps
 - Needs and Plans for Change
 - Views and Practice on EU-Driven Initiatives

Coverage

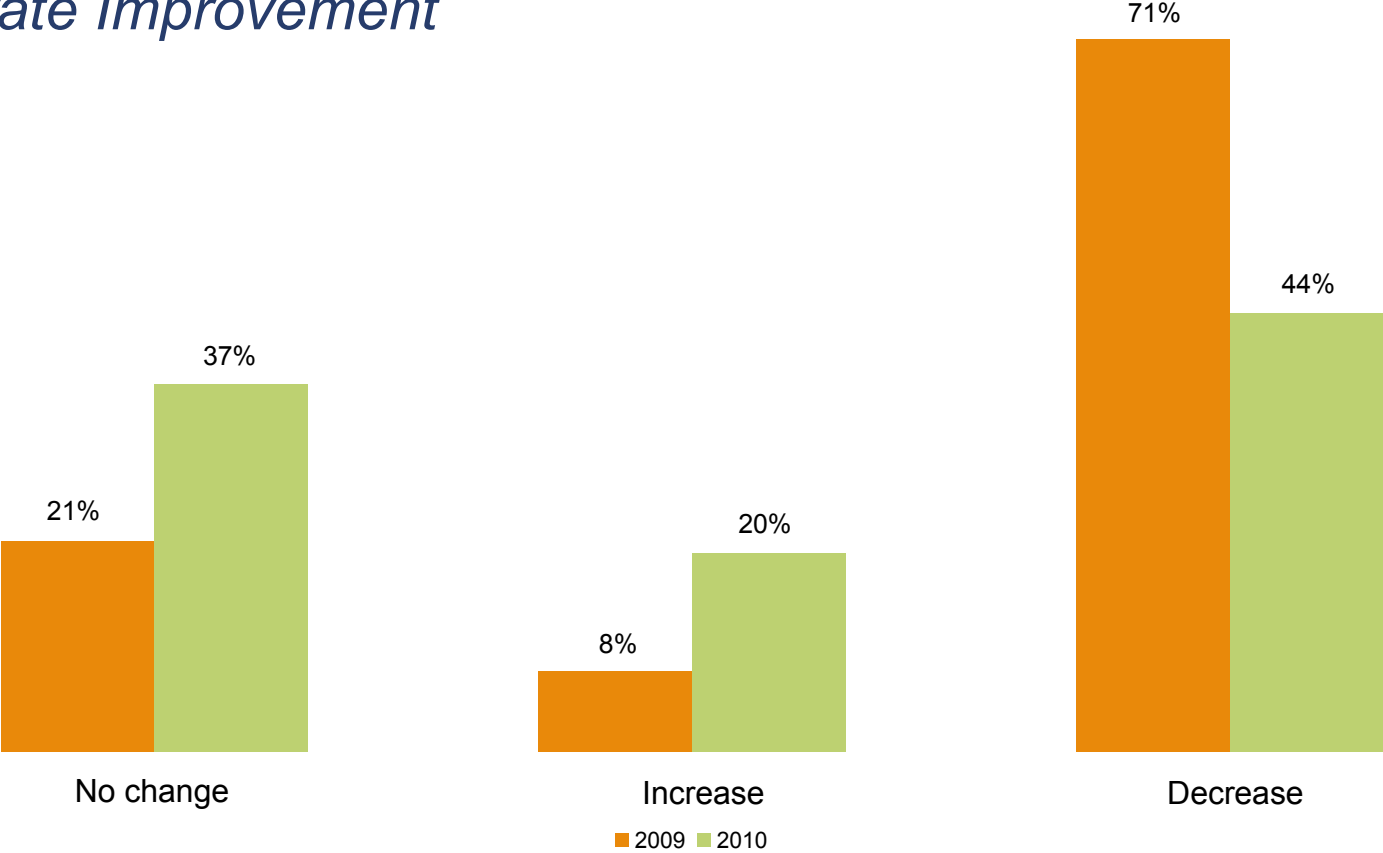
- ▣ 70 Organisations completed the survey (December 2009 – 22 January 2010)
 - 68% Listed Companies
 - Employing > 3.7 million people
 - Generating Revenues of 600 bn Euro in 2009
 - 61% VPHR and Executive Board Members
 - 59% Directly Reporting to CEO
 - 66% HRD > 45 years old
 - 89% HRD > 15 years professional experience
 - 79% Men

Key Learning

- Better but still challenging outlook for 2010
- Downturn measures paid off
- More balanced HR policy-mix geared towards leadership and talent
- Widening HR delivery gap requires urgent and sustainable fixing
- Thorough upgrade of HR business expertise and capabilities
- High expectations for a new EU results-driven agenda

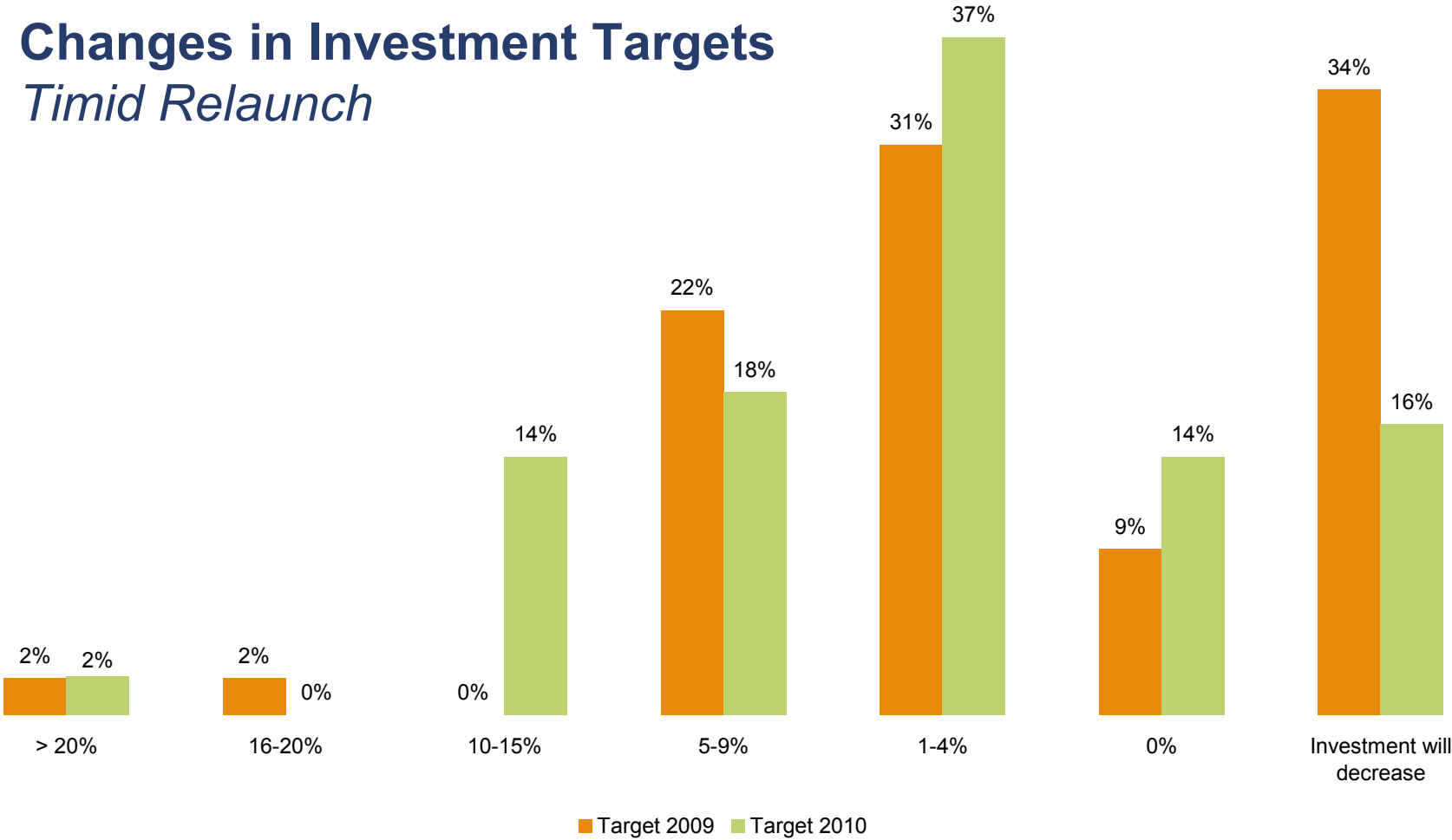
Expected Changes in Employment

Moderate Improvement



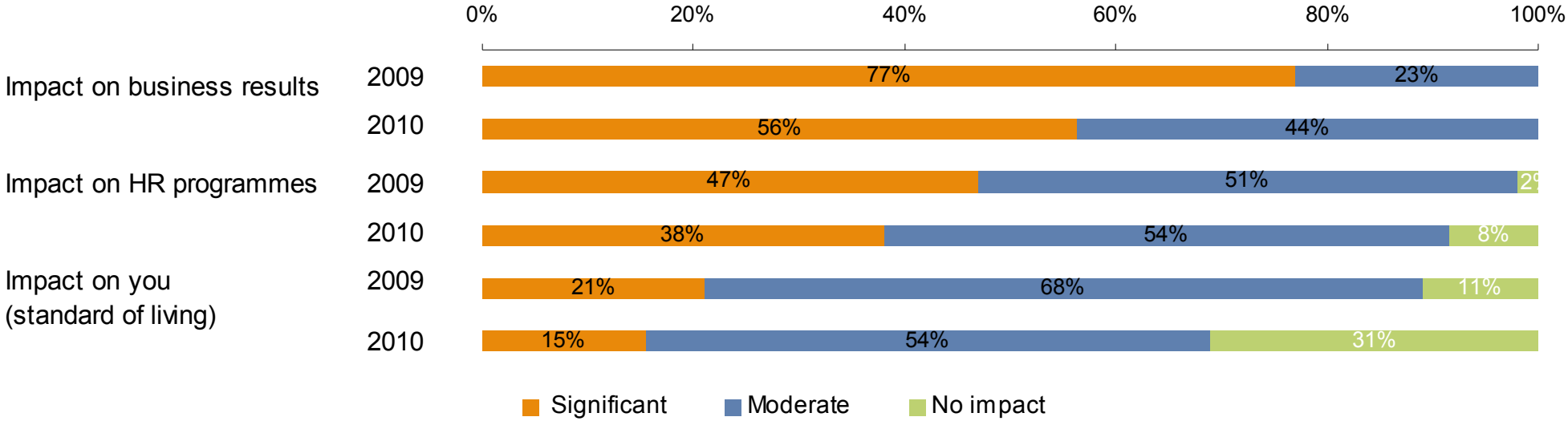
Changes in Investment Targets

Timid Relaunch



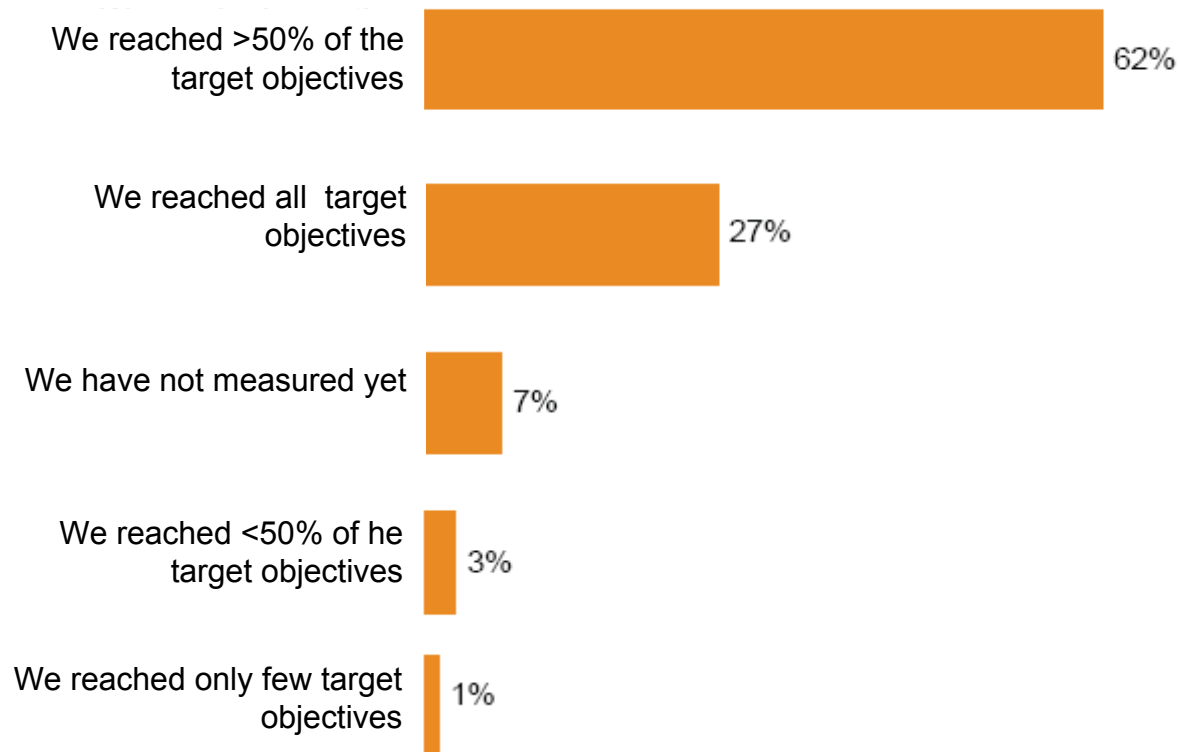
Expected Impact of the Slowdown 2009 – 2010

Negative Impact Persists, but Less Pronounced



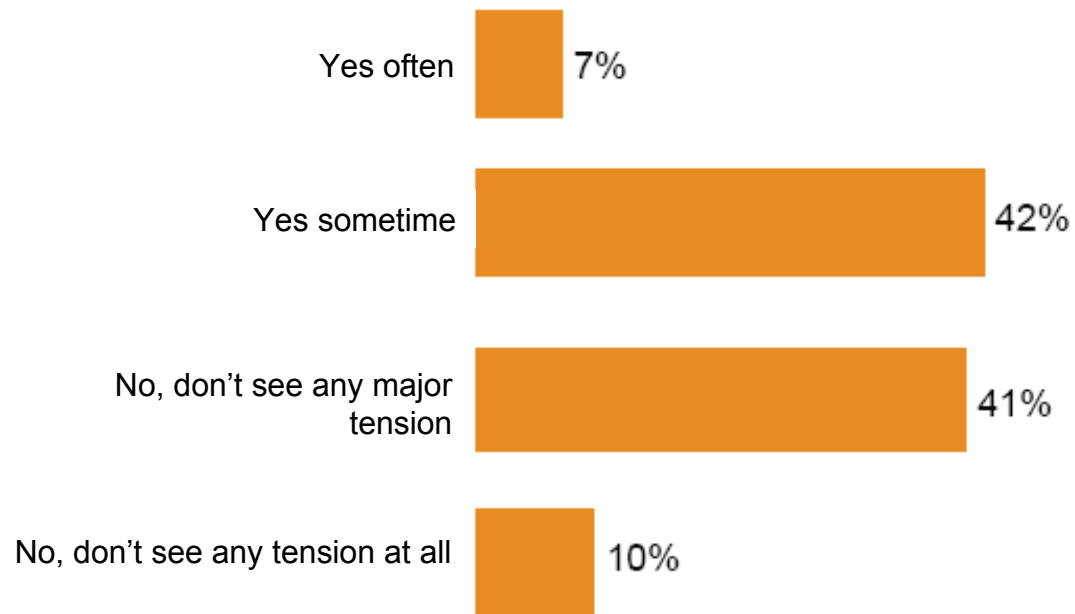
Impact of Measures Undertaken in 2009

Often Successful



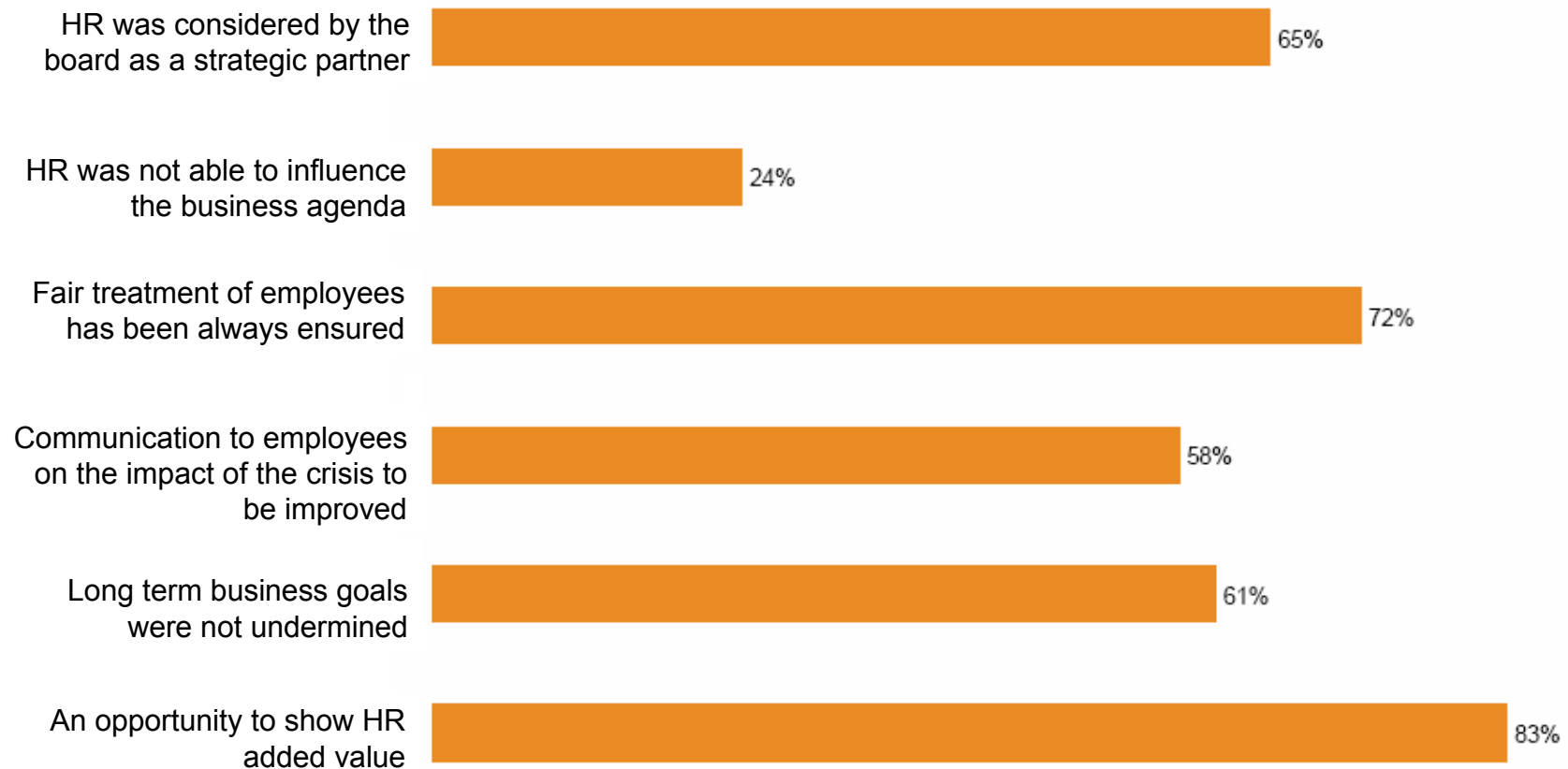
Tension Between Personal Values and Daily Practices

Values and Practices Often Re-aligned



Key Learning From the Downturn

An Opportunity Rather Than a Threat for HR



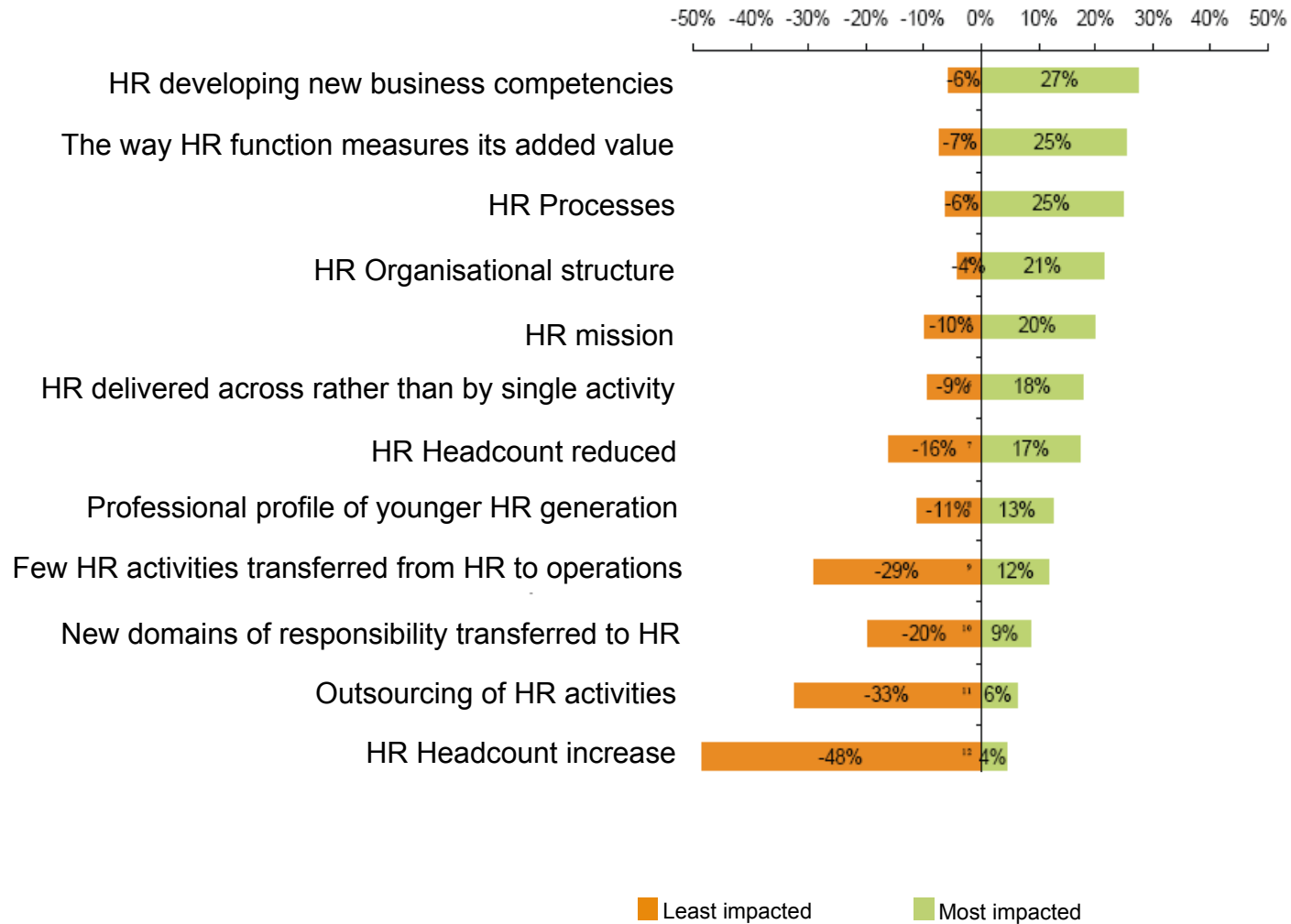
New Measures Planned for 2010

Fit for Growth



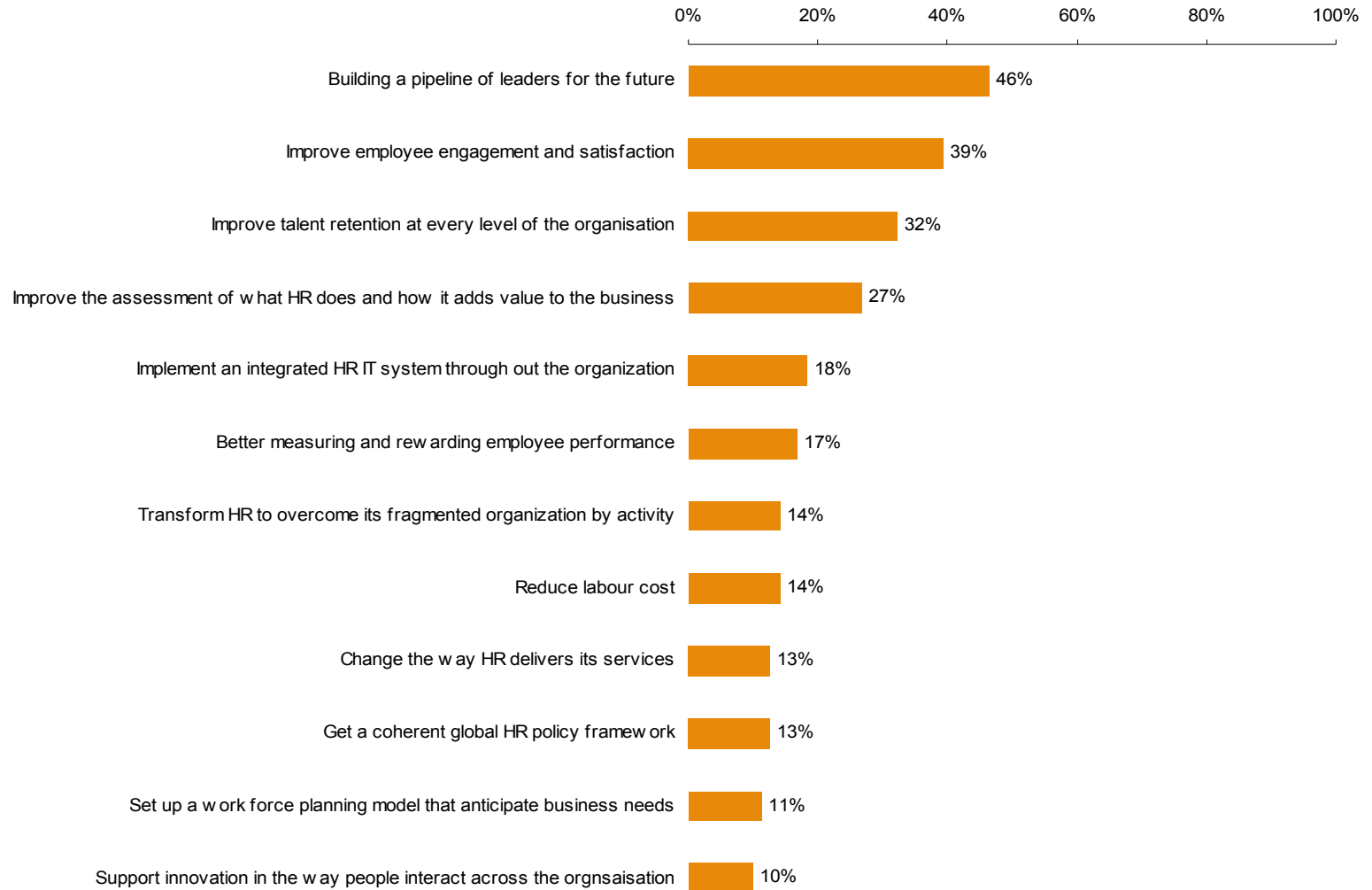
Most and Least Impacted Areas (2010 – 2012)

Changing HR 'Acquis'



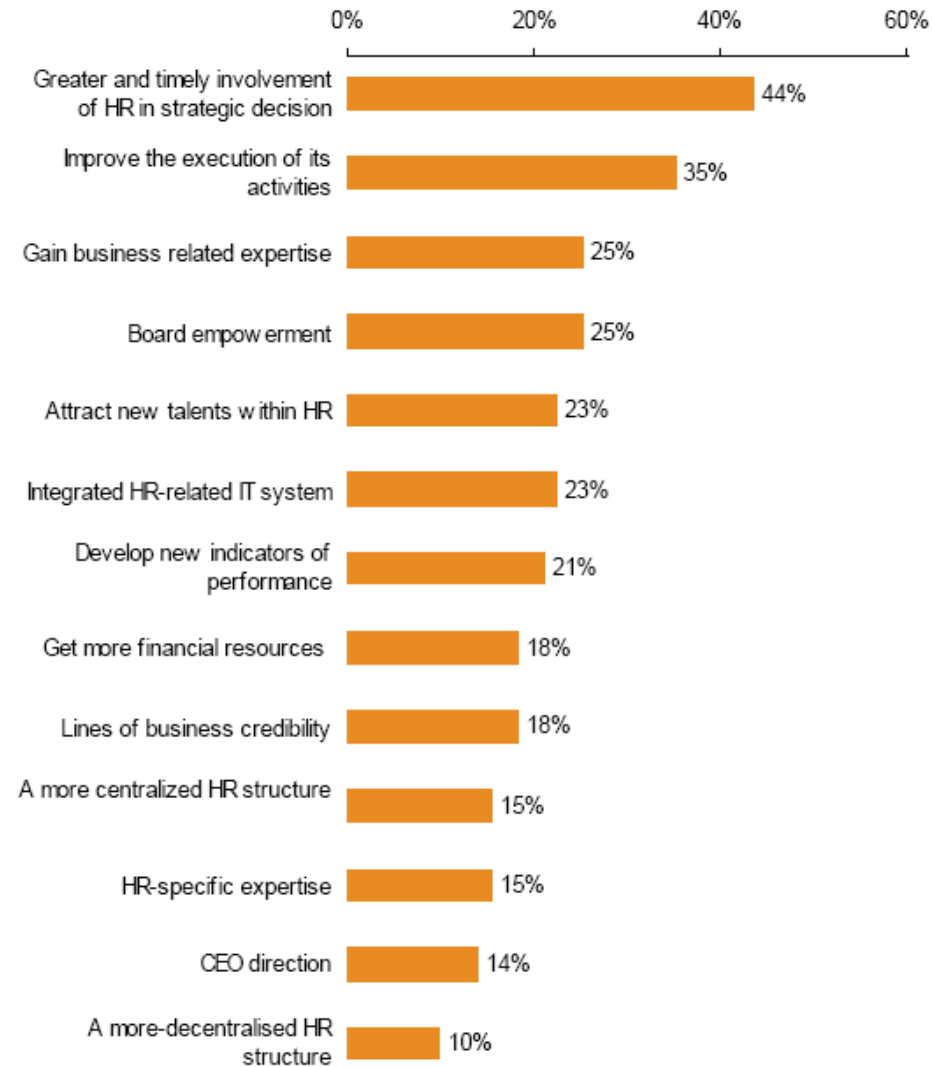
Top HR Priorities for 2010-2012

Leadership, Engagement and Talent Management

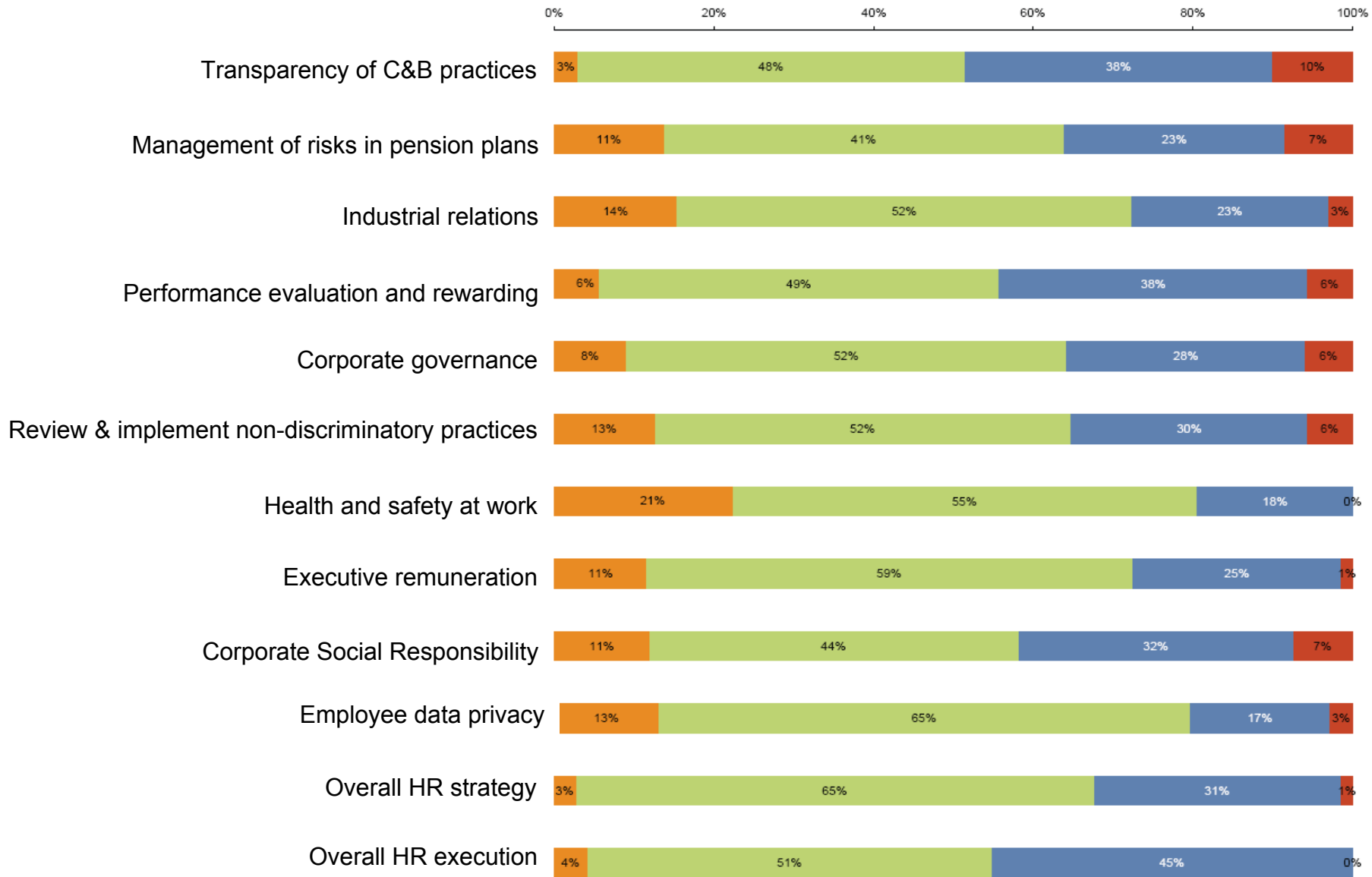


Top HR Needs

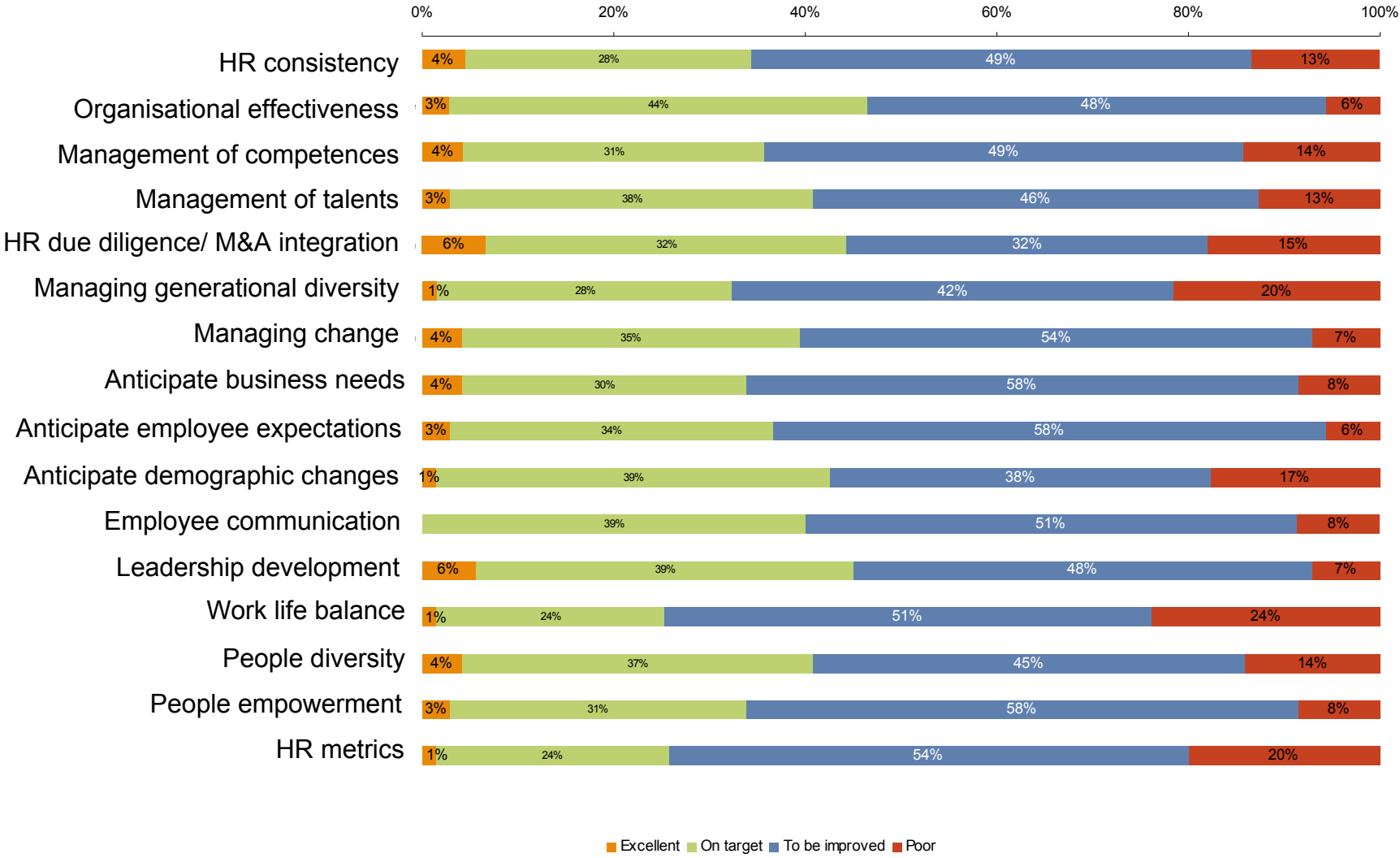
Earlier In and Better Off



Best Performing HR Specific Activities (>50% of Respondents Below Target)

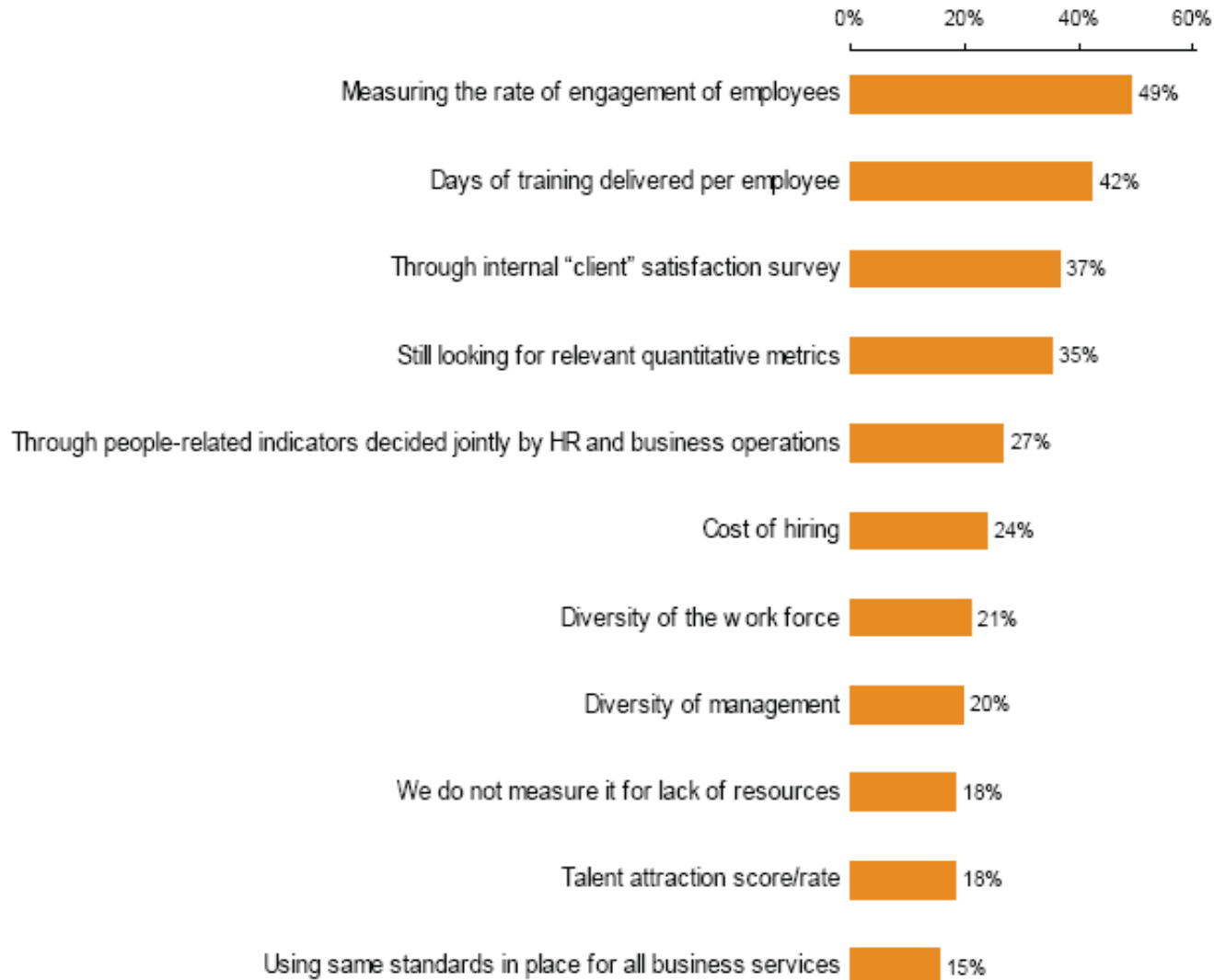


Least Performing HR Specific Activities (>50% of Respondents Below Target)



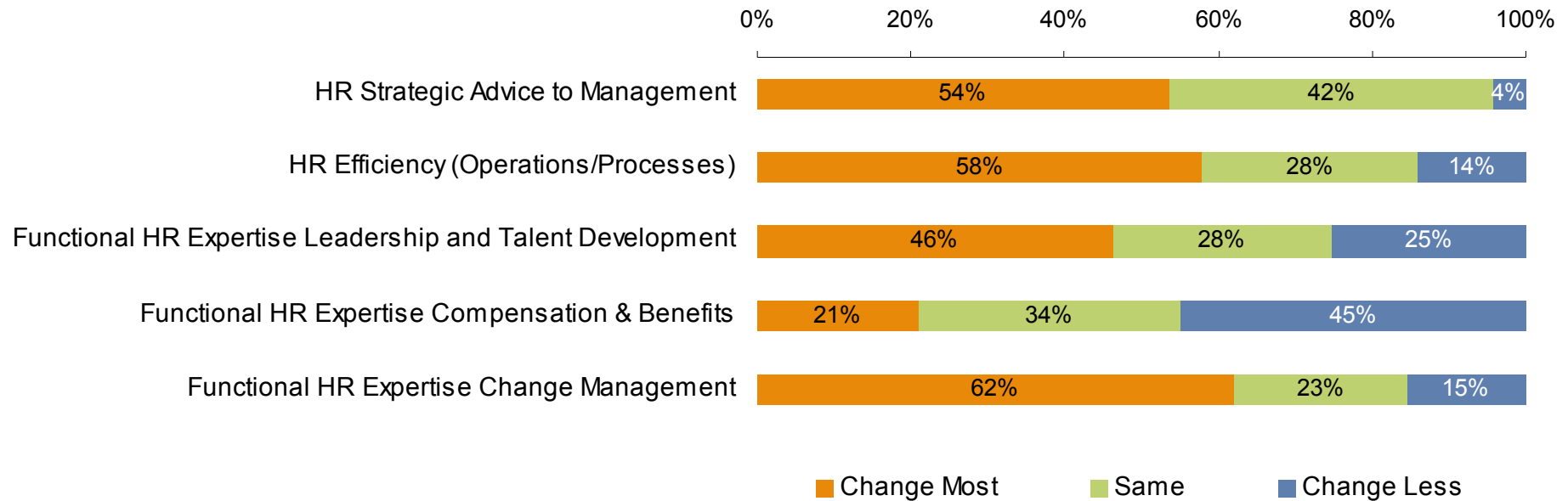
Most Used HR Metrics

More People Oriented, But Not Yet Always Right



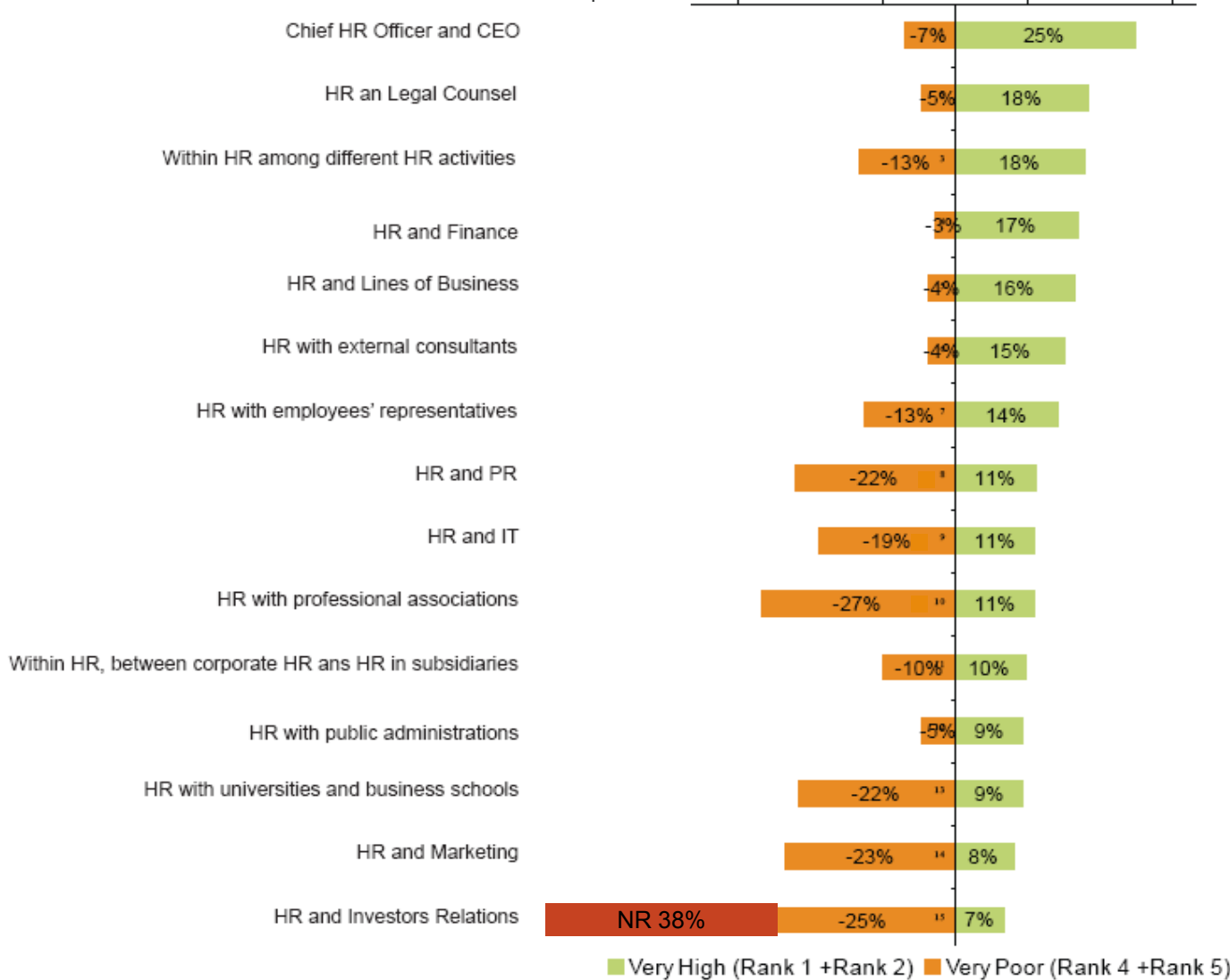
Expected Changes in HR Competencies and Capabilities (by 2012)

Managing ...Change



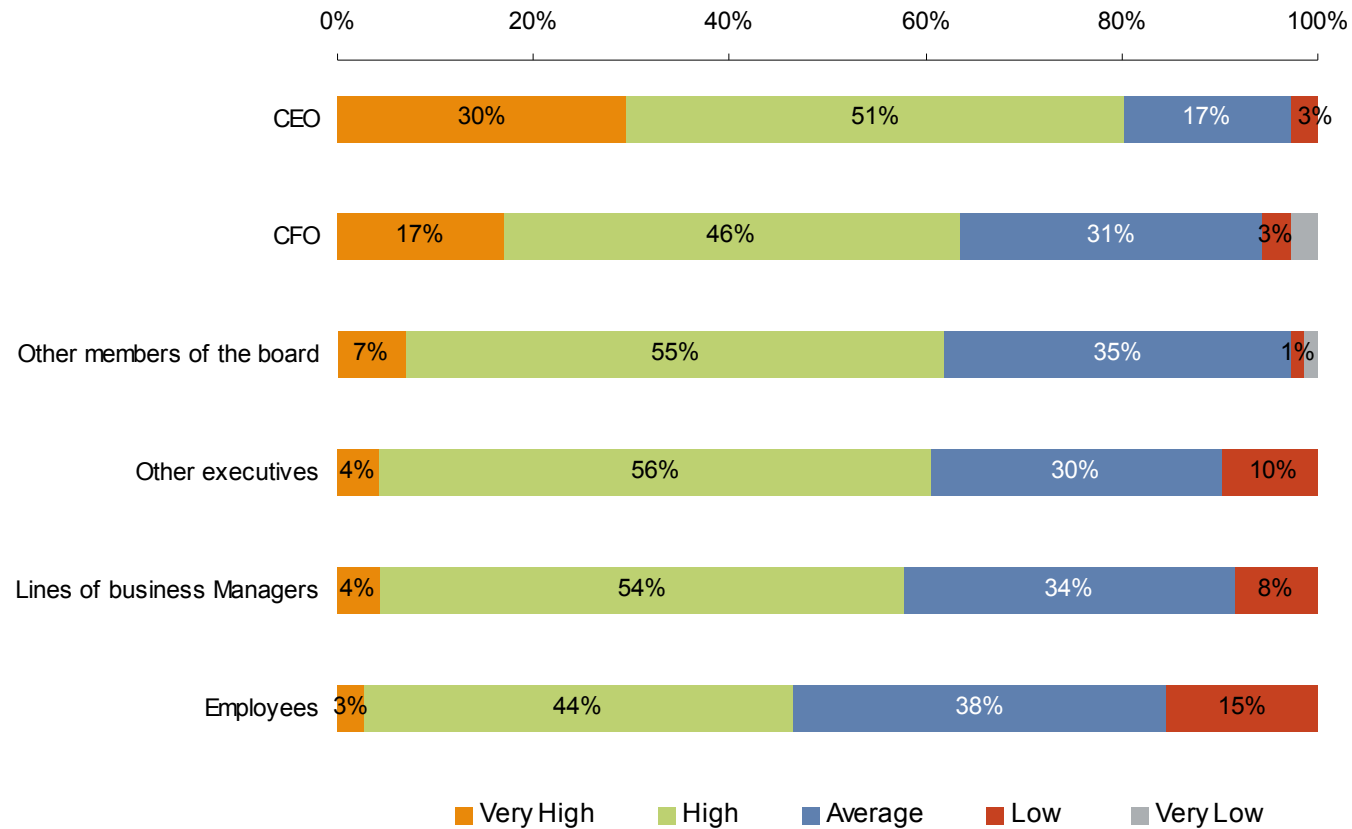
HR Level of Co-operation and Partnership

Key Connections Still Missed



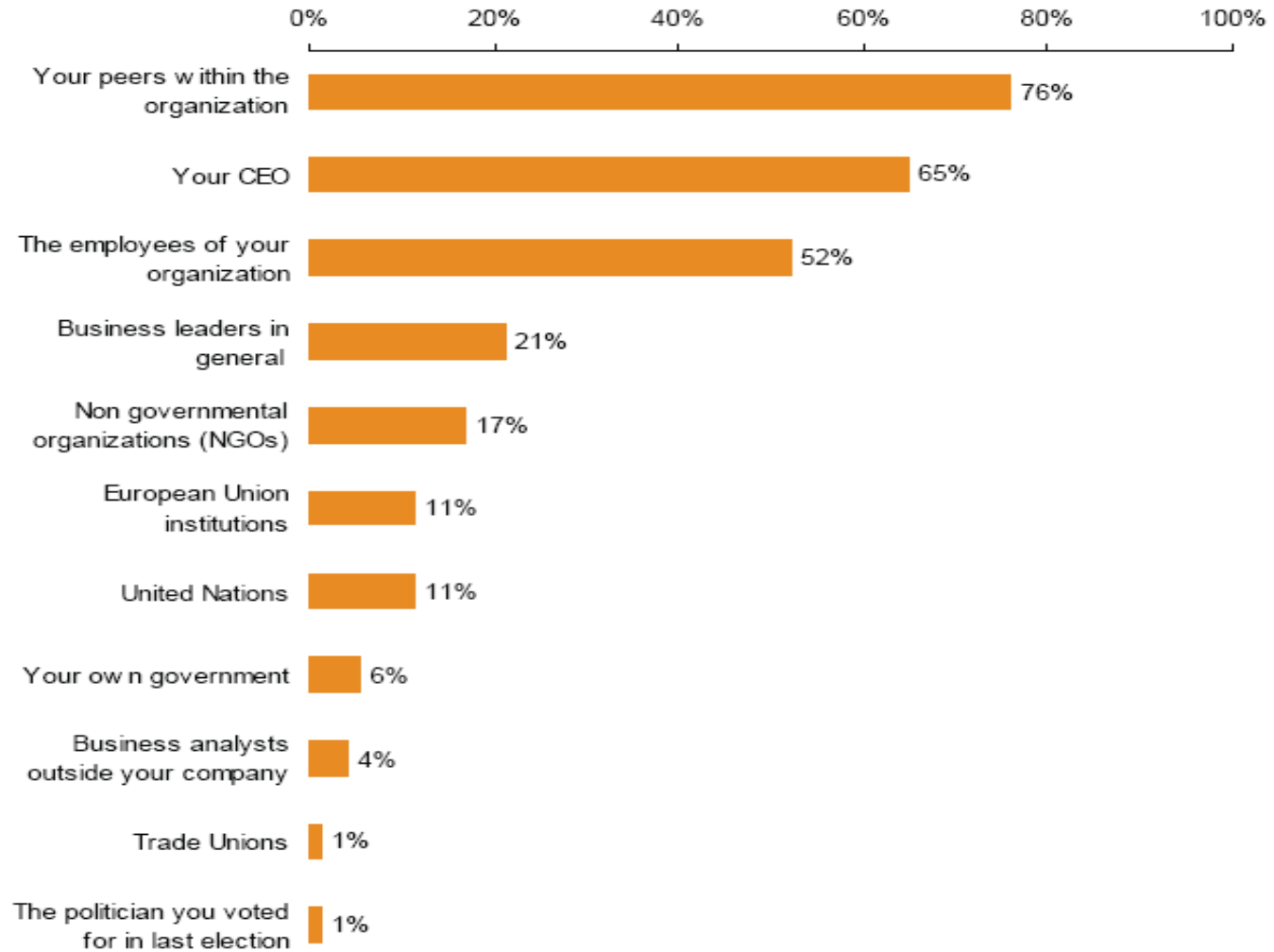
How HR is Perceived Within the Organisation

High Self Representation



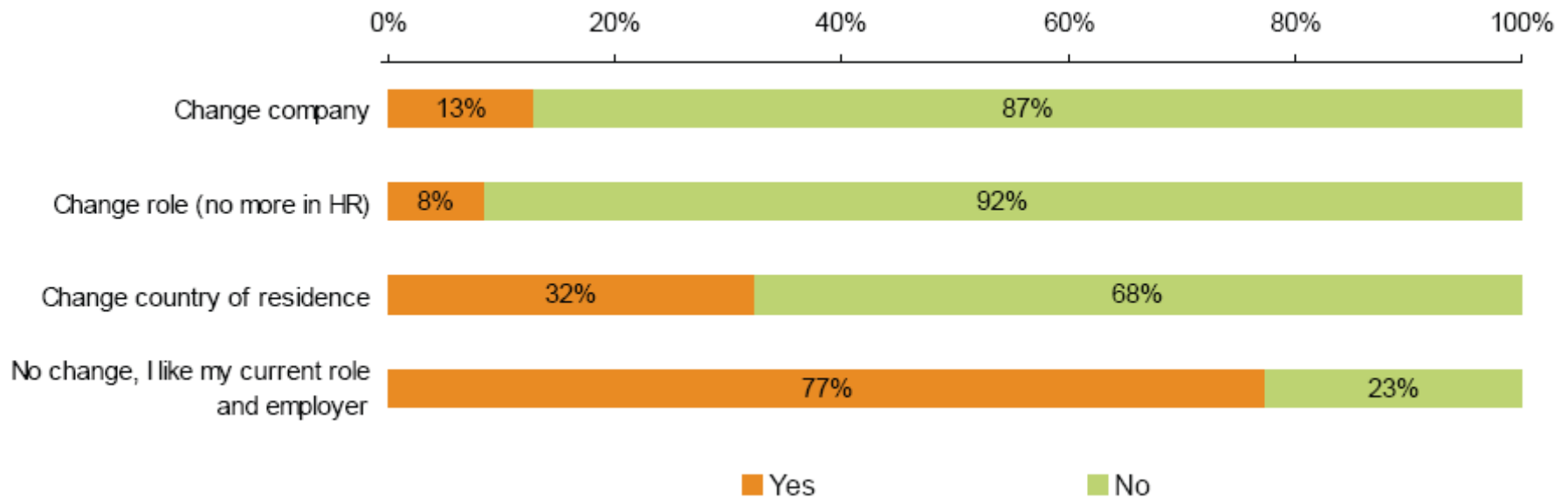
Most Trusted People and Organizations

Those Closer to HR



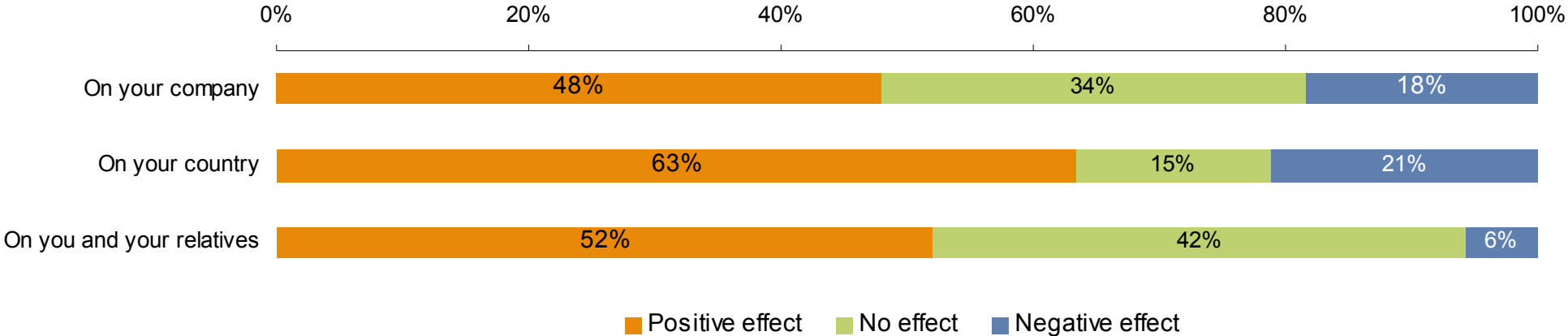
Wishes for Change

HR Loyal and Well Engaged



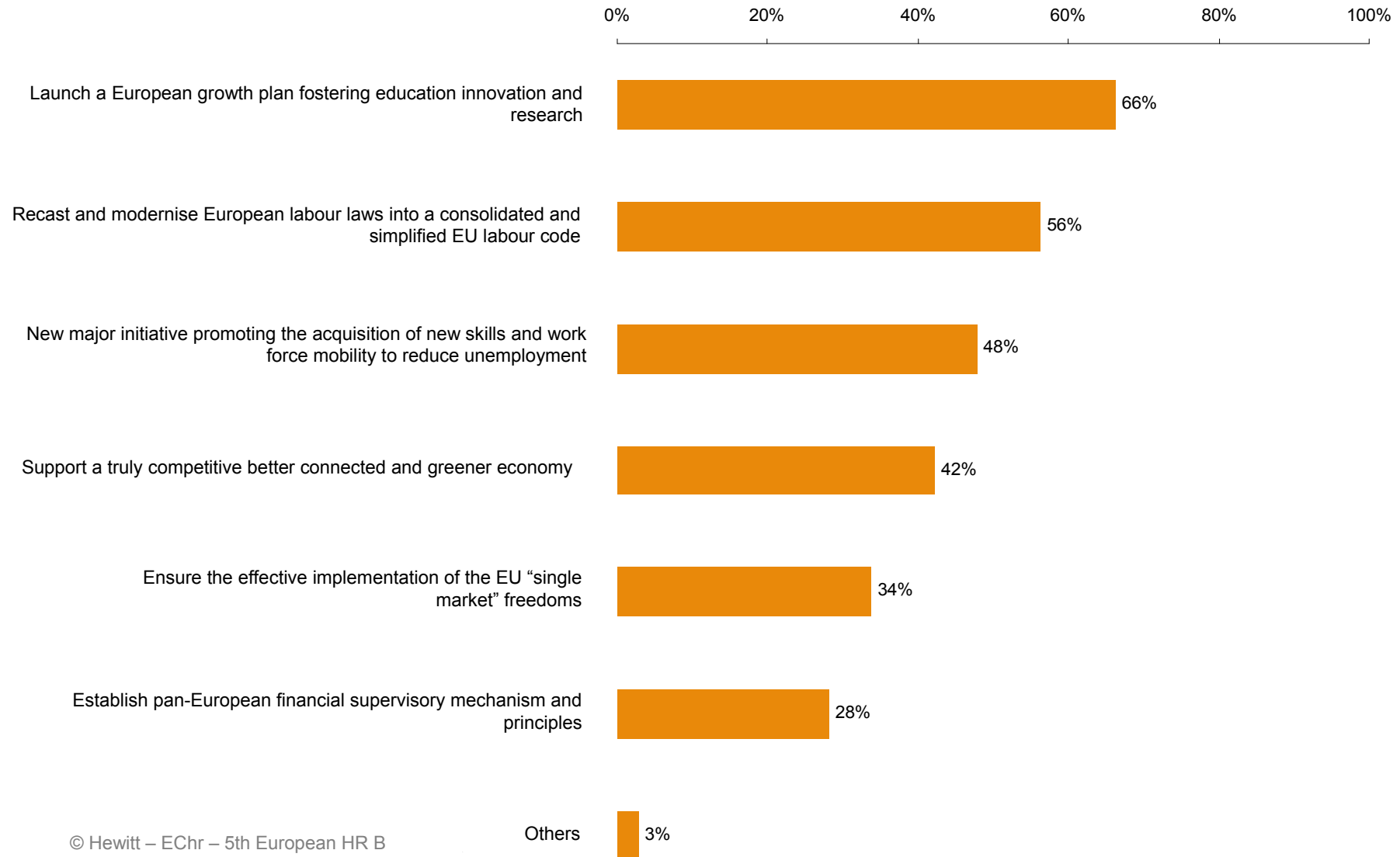
Perceived Impact of EU Activities

Still Positive but Declining



Top Priorities for EU Institutions

Innovation, Simplification, Skills and Mobility



In Summary

Key Areas of Action for HR

Recognised

- Implement a more balanced and dynamic policy mix geared towards HC development
- Deploy a total-quality evidence based framework for improving operational performance
- Upgrade HR business expertise and capabilities

Underestimated

- New business context
- Emerging work-force paradigms
- Broader partnership outlook

Participant Companies*

- ▣ AB InBev
- ▣ ABDI IBRAHIM Pharmaceutical
- ▣ Assicurazioni Generali
- ▣ Axpo Holding AG (for Axpo Konzern)
- ▣ Barry-Callebaut AG
- ▣ Belgacom
- ▣ Borealis AG
- ▣ Ceska Sporitelna
- ▣ Chantelle
- ▣ Chemetall GmbH
- ▣ Eden Springs
- ▣ Finansbank
- ▣ Gemalto
- ▣ Groupe Danone - Baby Nutrition Division
- ▣ Heidelberg Cement AG
- ▣ Hewitt Associates
- ▣ Irish Life & Permanent plc
- ▣ La Poste (FR)
- ▣ Legrand
- ▣ Magyar Telekom Group
- ▣ Manor AG
- ▣ MasterCard
- ▣ Maxeda
- ▣ Mediobanca-banca di credito finanziario
- ▣ Pentair International
- ▣ Raiffeisen International
- ▣ Rexel
- ▣ S&B Industrial Minerals SA
- ▣ Staples
- ▣ Stork B.V.
- ▣ Swisscom
- ▣ Umicore
- ▣ Veolia

***Excluding participants that didn't wish to disclose their name**

For further information on the HR Barometer

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