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PayWell Romania 2014

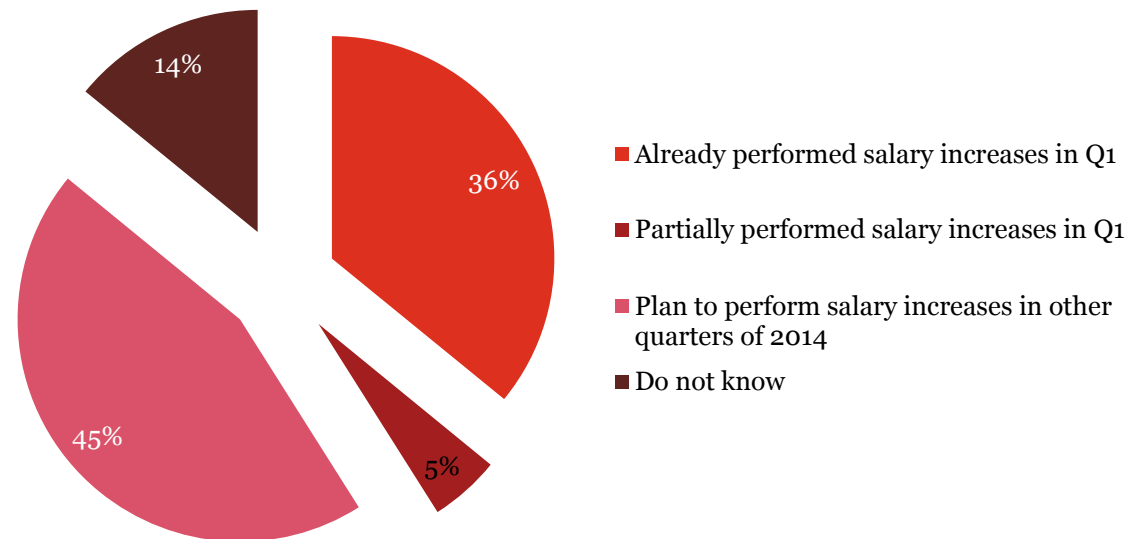
Salary & benefits survey results – At a glance



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86% of the participating companies increased or plan to increase wages in 2014

**Salary increase approach - Overall market
(% of participants)**



The average salary increase rate in 2014 is 12% lower than in 2013

Sector	Salary increase 2014 - All staff	Salary increase 2013 - All staff	2014 vs 2013
Banking	3.2%	2.6%	19%
FMCG	4.3%	4.8%	-12%
Industrial Products	4.3%	4.3%	0%
IT&C	7.0%	6.5%	7%
Leasing	3.8%	no data	-
Pharmaceuticals	4.7%	5.3%	-13%
Retail	3.2%	3.1%	3%
Overall Market	4.1%	4.6%	-12%

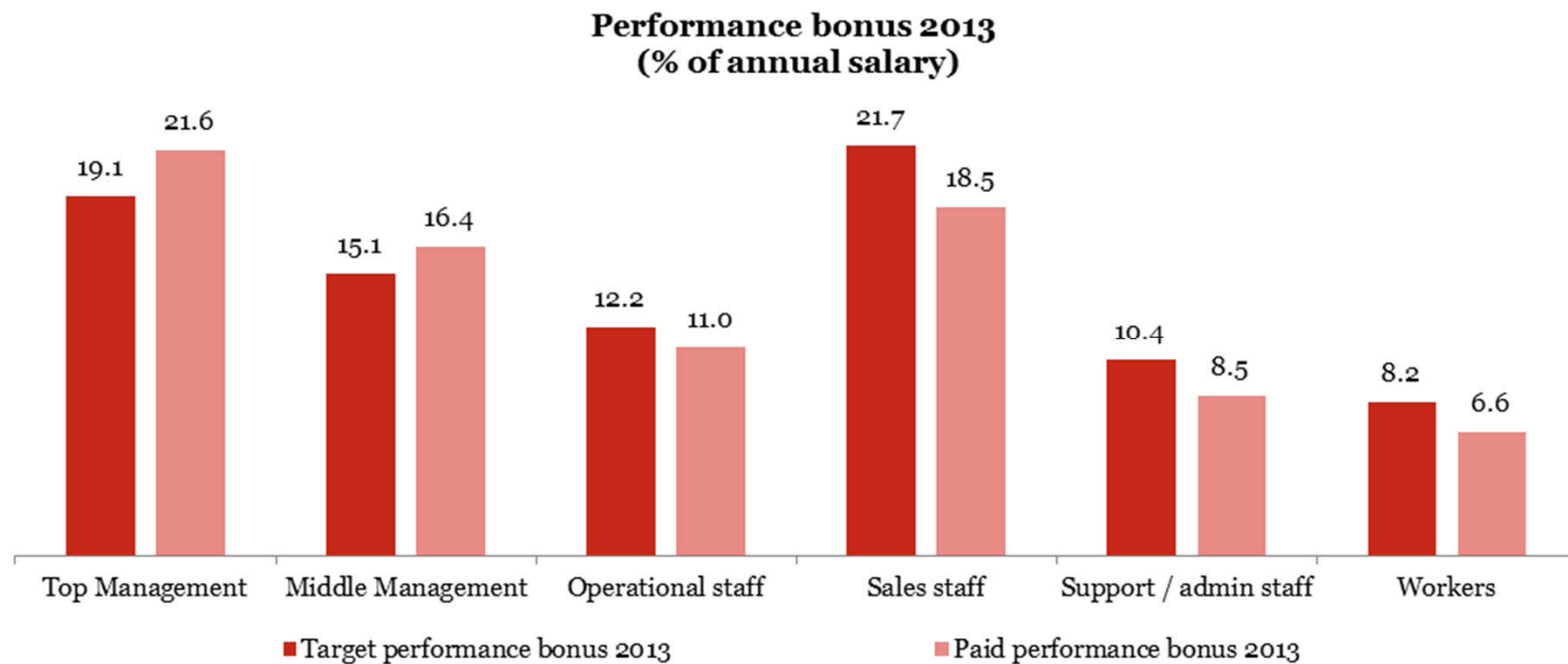
For **2015**, 54% of the participating companies in the PayWell Romania 2014 study have budgeted a salary increase rate of **4.1%** (for overall market), which is similar to this year's.

More than half of the companies provide fix bonuses to their employees on various occasions

Sector	Offer to all staff	Offer to certain staff categories	Do not offer
Banking	45%	14%	41%
FMCG	57%	29%	14%
Industrial Products	73%	18%	9%
IT&C	60%	0%	40%
Leasing	25%	0%	75%
Pharmaceuticals	56%	6%	39%
Retail	36%	0%	64%
Overall Market	51%	10%	38%

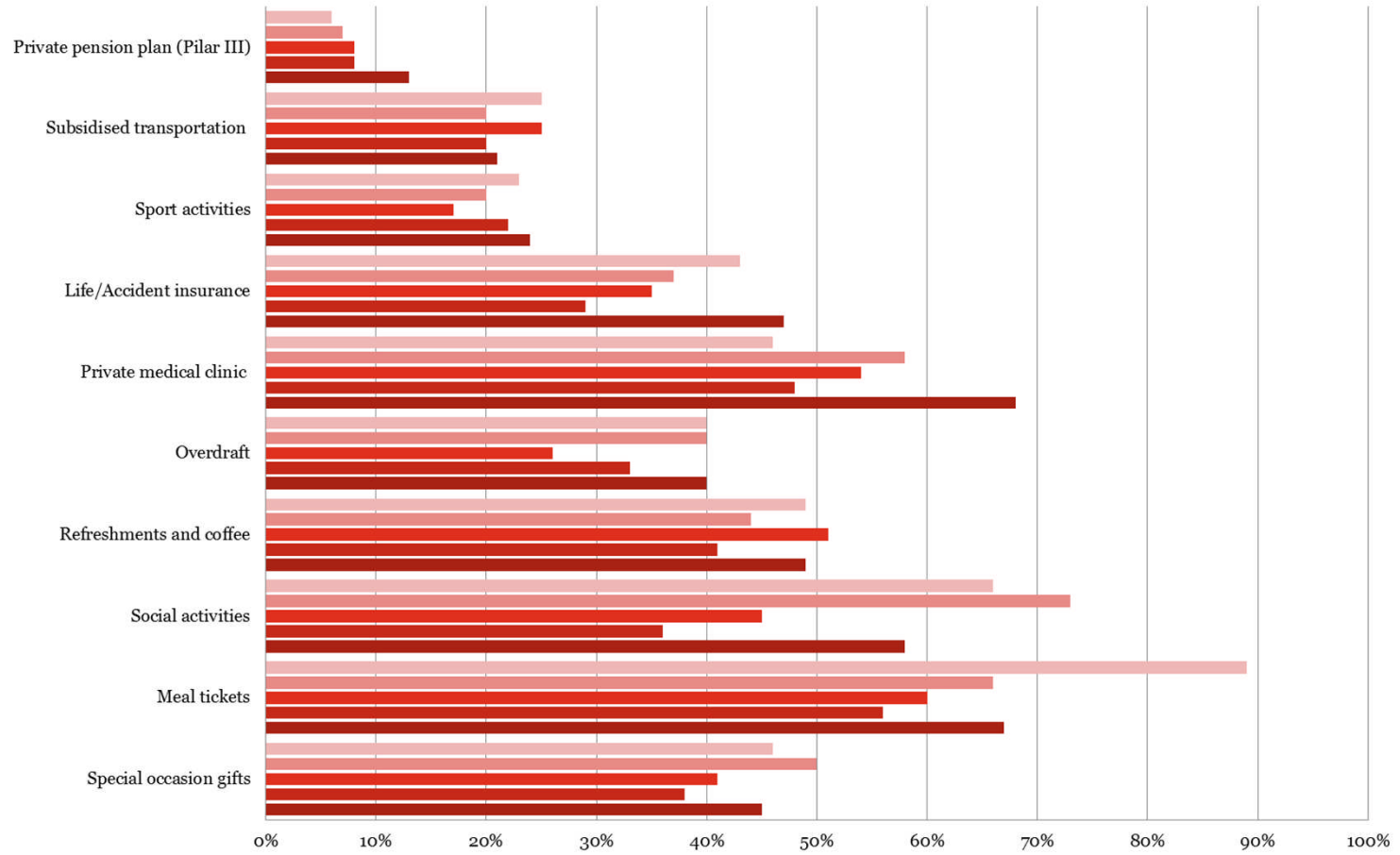
This type of bonuses are offered mostly in connection with the winter holidays, Easter and the summer season vacations, and their value may reach 2,250 RON/annum, depending on the occasion.

Except management staff, the paid performance bonus was slightly lower than the targeted one

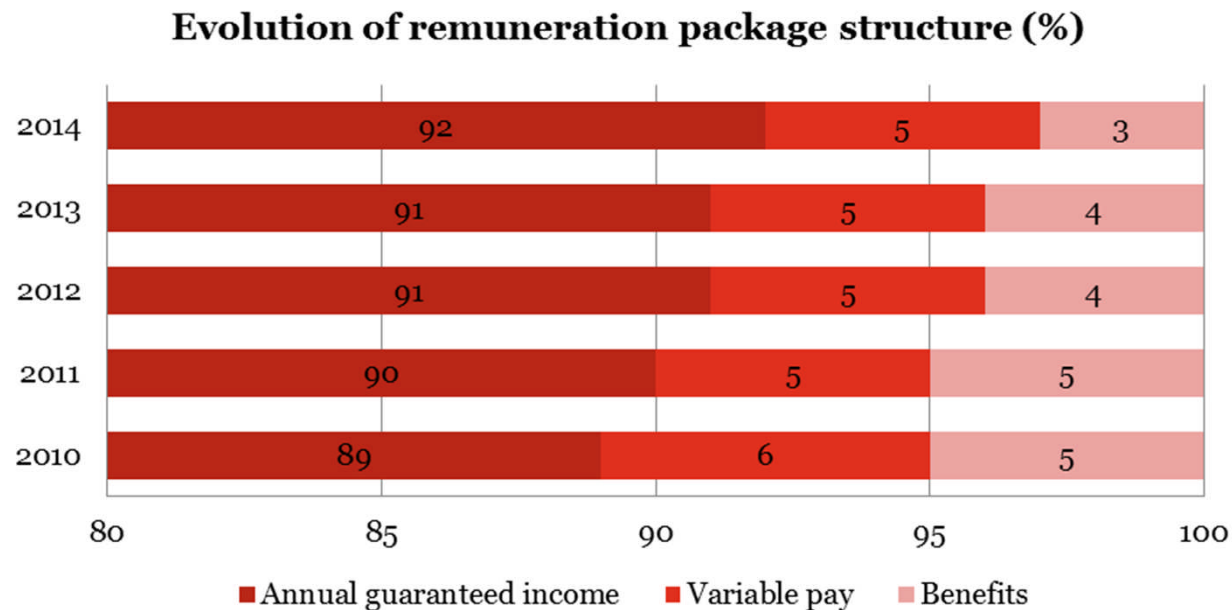


% of companies offering non-wage benefits increased slightly in 2014 for all types of benefits

Evolution of main benefits offered
(% of participating companies)



Weight of fixed income has increased in the last years due to the decrease of variable pay and benefits values



Appendix - About the survey

About PayWell survey

Methodology

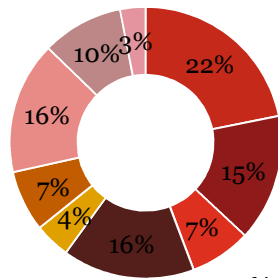
- PwC conducted the survey during January and July 2014
- Participation in the survey implies provision of information on salary levels and compensation and benefits policies present within the reporting organisations
- Before completing the data, a job matching process was realised together with PwC consultants, through “one-to-one” meetings with representatives of each participating company
- The data collected during the survey is and will be treated as strictly confidential. The security measures include data coding, limiting the number of consultants working on the project and presenting only general findings. The information provided by the respondents is not identifiable.

The survey report includes

- Salary ranges for general and specific jobs for the analysed sectors
- Customised salary reports (based on peer groups)
- Interactive market positioning tool
- Compensation and Benefits policies review

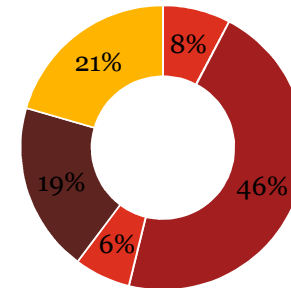
Demographics

Sector
(% of participants)



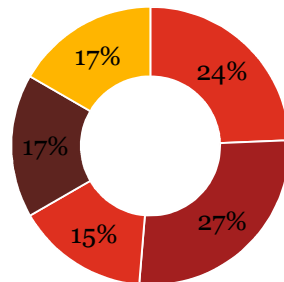
- Advertising
- Banking
- FMCG
- Industrial Products
- IT&C
- Leasing
- Pharmaceuticals
- Retail
- Outsourcing & Shared Service Centres

Turnover
(% of participants)



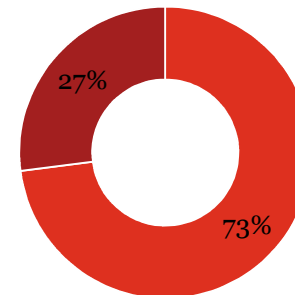
- < 10 millions EUR
- 10 - 50 millions EUR
- 51 - 100 millions EUR
- 101 - 300 millions EUR
- > 300 millions EUR

Headcount
(% of participants)



- < 100 employees
- 101 - 500 employees
- 501 - 1000 employees
- 1001 - 3000 employees
- > 3000 employees

Ownership
(% of participants)



- Foreign ownership
- Local ownership

Contact us!

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