COMPENSATION PLANNING FOR 2017
EMEA FORECASTS AND TRENDS

NOVEMBER 3 2016

Monika Todor, Poland
Nuno Gomes, UAE
Nicol Mullins, South Africa
David Wreford, UK
TODAY’S SPEAKERS

MONIKA TODOR
Poland

NUNO GOMES
UAE

NICOL MULLINS
South Africa

DAVID WREFORD
UK
AGENDA FOR TODAY’S SESSION

Context for Planning

Mercer Survey Insights

Trends for 2017 and Beyond

Call to Action
CONTEXT FOR PLANNING
EUROPE
ECONOMIC AND MARKET CONTEXT

**BREXIT** means BREXIT

Q. When considering working for an organisation, how important is it to you that the organisation has a public commitment to making a positive impact on the wider society?

- **Very important**
- **Moderately important**
- **Little importance**
- **Not important**

Income increases, Inflation, GDP, Unemployment

<table>
<thead>
<tr>
<th>Country</th>
<th>Salary increases</th>
<th>Inflation</th>
<th>GDP</th>
<th>Unemployment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>5%</td>
<td>-2.5%</td>
<td>1.5%</td>
<td>8%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>2%</td>
<td>3%</td>
<td>0.5%</td>
<td>5%</td>
</tr>
<tr>
<td>Greece</td>
<td>1%</td>
<td>4%</td>
<td>1.5%</td>
<td>6%</td>
</tr>
<tr>
<td>Spain</td>
<td>0%</td>
<td>6%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Denmark</td>
<td>3%</td>
<td>3%</td>
<td>2.5%</td>
<td>5%</td>
</tr>
<tr>
<td>France</td>
<td>2%</td>
<td>4%</td>
<td>1.5%</td>
<td>6%</td>
</tr>
<tr>
<td>Italy</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Germany</td>
<td>0%</td>
<td>6%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>UK</td>
<td>2%</td>
<td>4%</td>
<td>1.5%</td>
<td>6%</td>
</tr>
<tr>
<td>Lithuania</td>
<td>3%</td>
<td>3%</td>
<td>2.5%</td>
<td>5%</td>
</tr>
<tr>
<td>Slovenia</td>
<td>1%</td>
<td>4%</td>
<td>1.5%</td>
<td>6%</td>
</tr>
<tr>
<td>Hungary</td>
<td>0%</td>
<td>6%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Poland</td>
<td>2%</td>
<td>4%</td>
<td>1.5%</td>
<td>6%</td>
</tr>
<tr>
<td>Romania</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Serbia</td>
<td>0%</td>
<td>6%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Turkey</td>
<td>2%</td>
<td>4%</td>
<td>1.5%</td>
<td>6%</td>
</tr>
<tr>
<td>Russia</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Ukraine</td>
<td>0%</td>
<td>6%</td>
<td>1%</td>
<td>5%</td>
</tr>
<tr>
<td>Kazakhstan</td>
<td>3%</td>
<td>3%</td>
<td>2.5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Digital Workplace (Dedicated mobile device for employee)**

** muj# Online portal (personal page for employees)**

**PIM Flyer and Poster (Before personalisation)**
MIDDLE EAST
ECONOMIC AND MARKET CONTEXT

- GEO-POLITICAL INSTABILITY
- ECONOMIC UNCERTAINTY AND TURMOIL
- GOVERNMENT INTERVENTION
AFRICA ECONOMIC AND MARKET CONTEXT

- Low GDP Growth
- Low Inflation
- Bad performing currencies

- High GDP Growth
- High Inflation

Sources: GDP, inflation: http://www.imf.org, World Economic Outlook Database October 2016
http://www.nigerianinfopedia.com/strongest-currencies-africa-top-10/
SALARY MOVEMENT SNAPSHOT SURVEY
PARTICIPANT PROFILE – SEPTEMBER 2016

5,165 PARTICIPANTS

401 UNIQUE ORGANISATIONS

83 MARKETS

Source: Mercer EMEA SMS September 2016
SALARY MOVEMENT SNAPSHOT
PARTICIPANT PROFILE

CONSUMER GOODS
HIGH TECH
LIFE SCIENCES
ENERGY
OTHER DURABLE GOODS MANUFACTURING

17%
13%
12%
11%
10%

6%
7%
5%
13%
6%

OTHER NON-DURABLE MANUFACTURING
SERVICES
FINANCIAL SERVICES
OTHER
RETAIL & WHOLESALE
**L I V E  P O L L**

**Q U E S T I O N  1**

To what extent do your employees understand the basis upon which their pay and incentives are determined?

<table>
<thead>
<tr>
<th>Option</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>A –</td>
<td>Not at all</td>
</tr>
<tr>
<td>B -</td>
<td>To a slight extent</td>
</tr>
<tr>
<td>C -</td>
<td>To a moderate extent</td>
</tr>
<tr>
<td>D –</td>
<td>To a great extent</td>
</tr>
<tr>
<td>E –</td>
<td>To a very great extent</td>
</tr>
</tbody>
</table>
To what extent do your employees understand the basis upon which their pay and incentives are determined?

2016 Results
- Not at all: 0%
- To a slight extent: 20%
- To a moderate extent: 40%
- To a great extent: 10%
- To a very great extent: 50%

Based on 185 responses

2015 Results
- Not at all: 0%
- To a slight extent: 20%
- To a moderate extent: 50%
- To a great extent: 10%
- To a very great extent: 20%

Based on 183 responses
TRENDS FOR 2017 AND BEYOND
AFRICA
TRENDS FOR 2016 AND BEYOND AFRICA

- AFRICA is VUCA
  - Volatile
    - Currency
  - Uncertain
    - IMF latest projections
      - slow down in CPI
      - small growth in GDP
  - Complex
    - Legislation
  - Ambiguous

- Focus is on cash and benefits
  - Base salary not relevant benchmark

- Skill scarcity
  - High demand low supply - Most companies buy skills – very few build
OIL PRODUCING COUNTRIES
NON OIL PRODUCING COUNTRIES

- Angola
- Cameroon
- Chad
- DRC
- EQG
- Gabon
- Ghana
- Malawi
- Niger
- Nigeria
- ROC
- South Africa
- South Sudan
## Looking at Inflation

### Oil vs Non-Oil Producing Countries

<table>
<thead>
<tr>
<th></th>
<th>Inflation</th>
<th>2016 Average</th>
<th>2017 Average</th>
<th>2018 Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Oil Producing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>44.6%*</td>
<td>16.6%</td>
<td>10.3%</td>
<td></td>
</tr>
<tr>
<td><strong>Non-Oil Producing</strong></td>
<td>5.9%</td>
<td>5.7%</td>
<td>4.9%</td>
<td></td>
</tr>
</tbody>
</table>

### Highest

<table>
<thead>
<tr>
<th></th>
<th>Oil Producing</th>
<th>Non Oil Producing</th>
<th>Oil Producing</th>
<th>Non Oil Producing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>476.02%</td>
<td>19.10%</td>
<td>1.59%</td>
<td>0.97%</td>
</tr>
<tr>
<td></td>
<td>33.68%</td>
<td>16.70%</td>
<td>1.45%</td>
<td>0.59%</td>
</tr>
<tr>
<td></td>
<td>19.78%</td>
<td>9.73%</td>
<td>0.002%</td>
<td>-1.58%</td>
</tr>
</tbody>
</table>

### Lowest

<table>
<thead>
<tr>
<th></th>
<th>Oil Producing</th>
<th>Non Oil Producing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1.59%</td>
<td>0.97%</td>
</tr>
<tr>
<td></td>
<td>1.45%</td>
<td>0.59%</td>
</tr>
<tr>
<td></td>
<td>0.002%</td>
<td>-1.58%</td>
</tr>
</tbody>
</table>

* Excluding South Sudan 8.81%

LOOKING AT GDP
OIL VS NON-OIL PRODUCING COUNTRIES

<table>
<thead>
<tr>
<th>GDP Growth</th>
<th>2016 Average</th>
<th>2017 Average</th>
<th>2018 Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oil Producing</td>
<td>-0.06%</td>
<td>2.12%</td>
<td>3.20%</td>
</tr>
<tr>
<td>Non-Oil Producing</td>
<td>4.02%</td>
<td>4.54%</td>
<td>5.04%</td>
</tr>
</tbody>
</table>

Highest

<table>
<thead>
<tr>
<th>Oil Producing</th>
<th>5.23%</th>
<th>Non Oil Producing</th>
<th>7.17%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loweset</td>
<td>-1.74%</td>
<td></td>
<td>-9.86%</td>
</tr>
</tbody>
</table>

# Salary Increase Forecasts for 2017: Africa - All Responses

<table>
<thead>
<tr>
<th>Country</th>
<th>Increase</th>
<th>Country</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi</td>
<td>15.3%</td>
<td>Mozambique</td>
<td>6.5%</td>
</tr>
<tr>
<td>Ghana</td>
<td>11.6%</td>
<td>Tunisia</td>
<td>6.3%</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>10.9%</td>
<td>Mauritius</td>
<td>5.0%</td>
</tr>
<tr>
<td>Egypt</td>
<td>10.0%</td>
<td>DRC</td>
<td>5.0%</td>
</tr>
<tr>
<td>Nigeria</td>
<td>9.7%</td>
<td>Cameroon</td>
<td>4.5%</td>
</tr>
<tr>
<td>Angola</td>
<td>8.1%</td>
<td>Zimbabwe</td>
<td>4.5%</td>
</tr>
<tr>
<td>Zambia</td>
<td>7.8%</td>
<td>Morocco</td>
<td>4.4%</td>
</tr>
<tr>
<td>Kenya</td>
<td>7.5%</td>
<td>Senegal</td>
<td>4.1%</td>
</tr>
<tr>
<td>Uganda</td>
<td>7.3%</td>
<td>Burkina Faso</td>
<td>4.0%</td>
</tr>
<tr>
<td>South Africa</td>
<td>7.0%</td>
<td>Ivory Coast</td>
<td>4.0%</td>
</tr>
<tr>
<td>Tanzania</td>
<td>7.0%</td>
<td>Mali</td>
<td>3.8%</td>
</tr>
<tr>
<td>Algeria</td>
<td>6.7%</td>
<td>Gabon</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

Source: Mercer EMEA SMS September 2016
© MERCER 2016
To what extent do you proactively adapt your compensation policies to address your talent issues?

A – Not at all

B - To a slight extent

C - To a moderate extent

D – To a great extent

E – To a very great extent
To what extent do you proactively adapt your compensation policies to address your talent issues?

**2016 Results**
- Not at all: 50%
- To a slight extent: 20%
- To a moderate extent: 30%
- To a great extent: 10%
- To a very great extent: 0%

**2015 Results**
- Not at all: 40%
- To a slight extent: 20%
- To a moderate extent: 30%
- To a great extent: 10%
- To a very great extent: 0%

Based on 134 responses (2016) and 160 responses (2015).
TRENDS FOR 2017 AND BEYOND
MIDDLE EAST
TRENDS FOR 2017 AND BEYOND
MIDDLE EAST

COST OPTIMIZATION

SIMPLIFICATION

ENGAGEMENT
## Annual Total Remuneration

### Regional and Global Perspective

#### Executives

<table>
<thead>
<tr>
<th>Region</th>
<th>Salary</th>
<th>STI</th>
<th>Allowances</th>
<th>LTI</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qatar</td>
<td>57</td>
<td>8</td>
<td>27</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>63</td>
<td>7</td>
<td>18</td>
<td>12</td>
<td></td>
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<tr>
<td>UAE</td>
<td>56</td>
<td>7</td>
<td>23</td>
<td>2</td>
<td>12</td>
</tr>
<tr>
<td>Middle East</td>
<td>59</td>
<td>7</td>
<td>21</td>
<td>1</td>
<td>12</td>
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<tr>
<td>Western Europe</td>
<td>65</td>
<td>10</td>
<td>3</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>68</td>
<td>11</td>
<td>2</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td>56</td>
<td>16</td>
<td>15</td>
<td>12</td>
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</tr>
<tr>
<td>LATAM</td>
<td>65</td>
<td>12</td>
<td>32</td>
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<tr>
<td>Asia</td>
<td>67</td>
<td>15</td>
<td>4</td>
<td>3</td>
<td>11</td>
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<td>Africa</td>
<td>67</td>
<td>12</td>
<td>3</td>
<td>17</td>
<td></td>
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</tbody>
</table>

#### Professionals

<table>
<thead>
<tr>
<th>Region</th>
<th>Salary</th>
<th>STI</th>
<th>Allowances</th>
<th>LTI</th>
<th>Benefits</th>
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</thead>
<tbody>
<tr>
<td>Qatar</td>
<td>53</td>
<td>4</td>
<td>34</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>62</td>
<td>4</td>
<td>20</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>UAE</td>
<td>54</td>
<td>4</td>
<td>27</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Middle East</td>
<td>57</td>
<td>4</td>
<td>24</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Western Europe</td>
<td>74</td>
<td>4</td>
<td>21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>70</td>
<td>5</td>
<td>22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td>73</td>
<td>5</td>
<td>22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LATAM</td>
<td>70</td>
<td>6</td>
<td>4</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>71</td>
<td>9</td>
<td>4</td>
<td>16</td>
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</tr>
<tr>
<td>Africa</td>
<td>69</td>
<td>6</td>
<td>5</td>
<td>19</td>
<td></td>
</tr>
</tbody>
</table>

Source: Mercer’s 2016 Total Employment Costs Report
STAFF TURNOVER AND HIRING INTENTIONS
MARKET TRENDS

HIRING INTENTIONS

As of 2014

2014
- Increase Headcount: 68%
- Decrease Headcount: 5%
- No Change: 27%

As of 2015

2015
- Increase Headcount: 71%
- Decrease Headcount: 4%
- No Change: 25%

2015
- Increase Headcount: 57%
- Decrease Headcount: 5%
- No Change: 38%

As of 2016

2016
- Increase Headcount: 62%
- Decrease Headcount: 3%
- No Change: 35%

2016
- Increase Headcount: 44%
- Decrease Headcount: 10%
- No Change: 46%

2017
- Increase Headcount: 42%
- Decrease Headcount: 3%
- No Change: 55%

Source: 2014 - 2016 UAE TRS
## Salary Increase Forecasts for 2017

**Middle East/Asia – All Responses**

<table>
<thead>
<tr>
<th>Country</th>
<th>Increase</th>
<th>Country</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iran</td>
<td>20.1%</td>
<td>Jordan</td>
<td>5.3%</td>
</tr>
<tr>
<td>Syria</td>
<td>12.5%</td>
<td>Bahrain</td>
<td>5.0%</td>
</tr>
<tr>
<td>Pakistan</td>
<td>10.0%</td>
<td>Kuwait</td>
<td>5.0%</td>
</tr>
<tr>
<td>Yemen</td>
<td>8.5%</td>
<td>Oman</td>
<td>5.0%</td>
</tr>
<tr>
<td>Kazakhstan</td>
<td>8.5%</td>
<td>Qatar</td>
<td>5.0%</td>
</tr>
<tr>
<td>Uzbekistan</td>
<td>8.3%</td>
<td>Saudi Arabia</td>
<td>5.0%</td>
</tr>
<tr>
<td>Azerbaijan</td>
<td>8.0%</td>
<td>UAE</td>
<td>5.0%</td>
</tr>
<tr>
<td>Iraq</td>
<td>6.0%</td>
<td>Israel</td>
<td>3.1%</td>
</tr>
<tr>
<td>Lebanon</td>
<td>5.4%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Mercer EMEA SMS September 2016
To what extent do your pay and bonus programmes differentiate the employee attributes you feel are important to drive business performance?

A – Not at all
B - To a slight extent
C - To a moderate extent
D – To a great extent
E – To a very great extent
**L I V E  P O L L**  
**Q U E S T I O N  3**

To what extent do your pay and bonus programmes differentiate the employee attributes you feel are important to drive business performance?

**2016 Results**
- Not at all: [Bar Graph]
- To a slight extent: [Bar Graph]
- To a moderate extent: [Bar Graph]
- To a great extent: [Bar Graph]
- To a very great extent: [Bar Graph]

**2015 Results**
- Not at all: [Bar Graph]
- To a slight extent: [Bar Graph]
- To a moderate extent: [Bar Graph]
- To a great extent: [Bar Graph]
- To a very great extent: [Bar Graph]

Based on 133 responses

Based on 127 responses
TRENDS FOR 2017 AND BEYOND
EUROPE
On average 1.8 pp drop in salary increases in the WE region 2016 vs. 2008

Source: June 2016 Salary Movement Snapshot
2008 vs. 2016 Salary Increases
C&E – All Levels

On average 5.68 pp drop in salary increases in the CEE region 2016 vs. 2008

Source: June 2016 Salary Movement Snapshot
PAY PROGRESSION
CAREER STREAMS

WESTERN EUROPE

<table>
<thead>
<tr>
<th>Country</th>
<th>Para-Professional</th>
<th>Professional</th>
<th>Management</th>
<th>Executive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>2.9</td>
<td>3.7</td>
<td>3.3</td>
<td>4.2</td>
</tr>
<tr>
<td>France</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td></td>
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<td></td>
<td></td>
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</tbody>
</table>

EASTERN EUROPE

<table>
<thead>
<tr>
<th>Country</th>
<th>Para-Professional</th>
<th>Professional</th>
<th>Management</th>
<th>Executive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Czech Republic</td>
<td>6.4</td>
<td>8.0</td>
<td>7.9</td>
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</tr>
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<td>Poland</td>
<td></td>
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</tr>
<tr>
<td>Romania</td>
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</tr>
<tr>
<td>Russia</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: 2016 Total Remuneration Surveys
SALARY INCREASES
WESTERN EUROPE

NOMINAL AND REAL SALARY INCREASE 2009-2016
2009=0% (CUMULATIVE)

Nominal Salary Increase
Real Salary Increase

United Kingdom 0 3 5 6
Denmark 14 15 17
France 15 14 19
Germany 19 14 15

REAL CUMULATIVE SALARY INCREASES
2009-2016 (2009=0%)

Source: June 2016 Salary Movement Snapshot & IMF World Economic Outlook April 2016
## Nominal and Real Salary Increase 2009-2016

2009=0% (Cumulative)

<table>
<thead>
<tr>
<th>Country</th>
<th>Nominal Salary Increase</th>
<th>Real Salary Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Romania</td>
<td>-4%</td>
<td>0%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>-2%</td>
<td>-2%</td>
</tr>
<tr>
<td>Russia</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Poland</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Romania</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>10%</td>
<td>12%</td>
</tr>
</tbody>
</table>

### Real Cumulative Salary Increases 2009-2016 (2009=0%)

Source: June 2016 Salary Movement Snapshot & IMF World Economic Outlook April 2016
**ACTUAL SALARY INCREASES**

**PERFORMANCE MATRIX**

**Average actual salary increase 2016**

- **Denmark**: 3.4%
- **France**: 3.7%
- **Germany**: 3.9%
- **UK**: 3.7%

**Average forecast salary increase 2017**

- **Denmark**: 3.7%
- **France**: 3.6%
- **Germany**: 4.0%
- **UK**: 4.0%

Source: September 2016 Salary Movement Snapshot
ACTUAL SALARY INCREASES
PERFORMANCE MATRIX

Average actual salary increase 2016

- Czech Republic: 4.1%
- Poland: 4.8%
- Romania: 6.5%
- Russia: 11.1%

Average forecast salary increase 2017

- Czech Republic: 4.5%
- Poland: 4.8%
- Romania: 6.5%
- Russia: 10.6%

Source: September 2016 Salary Movement Snapshot

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### Salary Increase Forecasts for 2017

**Western Europe – All Responses**

<table>
<thead>
<tr>
<th>Country</th>
<th>Increase</th>
<th>Country</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>3.0%</td>
<td>France</td>
<td>2.2%</td>
</tr>
<tr>
<td>Germany</td>
<td>2.9%</td>
<td>Finland</td>
<td>2.0%</td>
</tr>
<tr>
<td>UK</td>
<td>2.8%</td>
<td>Portugal</td>
<td>2.0%</td>
</tr>
<tr>
<td>Austria</td>
<td>2.5%</td>
<td>Spain</td>
<td>2.0%</td>
</tr>
<tr>
<td>Denmark</td>
<td>2.5%</td>
<td>Luxembourg</td>
<td>2.0%</td>
</tr>
<tr>
<td>Italy</td>
<td>2.5%</td>
<td>Belgium</td>
<td>1.8%</td>
</tr>
<tr>
<td>Ireland</td>
<td>2.5%</td>
<td>Greece</td>
<td>1.8%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2.5%</td>
<td>Switzerland</td>
<td>1.8%</td>
</tr>
<tr>
<td>Sweden</td>
<td>2.5%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Mercer EMEA SMS September 2016
<table>
<thead>
<tr>
<th>Country</th>
<th>Increase</th>
<th>Country</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belarus</td>
<td>10.0%</td>
<td>Estonia</td>
<td>3.0%</td>
</tr>
<tr>
<td>Ukraine</td>
<td>10.0%</td>
<td>Latvia</td>
<td>3.0%</td>
</tr>
<tr>
<td>Russia</td>
<td>8.0%</td>
<td>Lithuania</td>
<td>3.0%</td>
</tr>
<tr>
<td>Turkey</td>
<td>8.0%</td>
<td>Slovakia</td>
<td>2.8%</td>
</tr>
<tr>
<td>Moldova</td>
<td>7.0%</td>
<td>Albania</td>
<td>2.8%</td>
</tr>
<tr>
<td>Georgia</td>
<td>6.3%</td>
<td>Czech Republic</td>
<td>2.8%</td>
</tr>
<tr>
<td>Armenia</td>
<td>5.0%</td>
<td>Croatia</td>
<td>2.7%</td>
</tr>
<tr>
<td>Serbia</td>
<td>4.5%</td>
<td>Macedonia</td>
<td>2.6%</td>
</tr>
<tr>
<td>Romania</td>
<td>4.5%</td>
<td>Slovenia</td>
<td>2.5%</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>4.0%</td>
<td>Bosnia and Herzegovina</td>
<td>2.4%</td>
</tr>
<tr>
<td>Hungary</td>
<td>3.4%</td>
<td>Montenegro</td>
<td>2.4%</td>
</tr>
<tr>
<td>Poland</td>
<td>3.0%</td>
<td>Cyprus</td>
<td>1.5%</td>
</tr>
</tbody>
</table>

Source: Mercer EMEA SMS September 2016
To what extent are your employees consistently paid for the work they do?

A – Not at all
B - To a slight extent
C - To a moderate extent
D – To a great extent
E – To a very great extent
LIVE POLL
QUESTION 4

To what extent are your employees consistently paid for the work they do?

2016 Results
- Not at all: 0%
- To a slight extent: 10%
- To a moderate extent: 30%
- To a great extent: 40%
- To a very great extent: 0%

2015 Results
- Not at all: 0%
- To a slight extent: 10%
- To a moderate extent: 30%
- To a great extent: 40%
- To a very great extent: 0%

Based on 137 responses
Based on 136 responses

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CALL TO ACTION
WORKFORCE TRENDS IMPACTING THE TALENT AGENDA IN 2016

LEVERAGING A DIVERSE LABOR POOL

MULTIGENERATIONAL WORKFORCE

TALENT SCARCITY

WORLD SOURCING

AUTOMATION & MACHINE LEARNING

DISRUPTIVE TECHNOLOGY

BIG DATA MANAGEMENT

RISE OF THE FREE AGENT

FLEXIBLE WORKING

Source: 2016 Mercer Global Talent Trends Survey
HOW DO WE ACCELERATE THE TALENT ENGINE?

- BUILD DIVERSE TALENT POOLS
- EMBRACE THE NEW WORK EQUATION
- DESIGN COMPELLING CAREERS
- SIMPLIFY TALENT PROCESSES

REDEFINE THE VALUE OF HR

Source: 2016 Mercer Global Talent Trends Survey
COMMUNICATE A CLEAR EMPLOYEE VALUE PROPOSITION

Raise employee awareness of programmes and listen for evolving needs

Influence of consumerization on the workplace is shaping expectations

FOCUS ON THE INDIVIDUAL

Provide managers the tools and resources needed to understand their employees as individuals

STRIVE FOR TRANSPARENCY AND PAY EQUITY

Examine pay parity in the workplace and review reward structures

HELP INDIVIDUALS FIND THEIR NICHE

Everyone wants to do meaningful work. How this is done and what is most important for ‘meaningfulness’ varies around the world
QUESTIONS
QUESTIONS

Please type your questions in the Q&A section of the toolbar and we will do our best to answer as many questions as we have time for.

To submit a question while in full screen mode, use the Q&A button, on the floating panel, on the top of your screen.

CLICK HERE TO ASK A QUESTION TO “ALL PANELISTS”

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