



MARKET INTELLIGENCE INDUSTRY KNOWLEDGE

Salary Guide and Market Overview 2013

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Tammy Nagy-Stellini
Managing Director, Hays Hungary

Welcome to the 2013 Hays Hungary Salary Guide and Market Overview.

We are delighted to present you this year's issue of the annual report, covering salary levels and key trends in the Hungarian employment market.

You will find comprehensive salary benchmarking and market analyses for experts and managers, split across 10 main specialist sectors, focusing on all the hiring trends over the past 12 months. We also look at all the major economic, legislative and technological changes that we feel will shape the jobs market in 2013.

The report presents the minimum, maximum and average gross monthly salaries in Hungarian Forints (HUF) for full-time positions. The data is taken from hundreds of recruitment projects run by Hays Hungary nationwide for its multinational and SME private sector clients in 2012.

We hope you will find the information and insight presented in our Salary Guide and Market Overview 2013 both interesting and useful in assisting with pay reviews, benchmarking within your sector and planning your new budgets.

YOUR BUSINESS OUR EXPERTISE

Hays Hungary is part of Hays plc, the world's leading company in qualified, professional and skilled recruitment.

The Group operates out over 245 offices in 33 countries, employing around 7,800 staff worldwide across 20 specialisms.

Last year our experts placed around 55,000 people in permanent jobs and around 182,000 people into temporary assignments.

About Hays Hungary

Having launched our first office in Budapest in 2007, we are proud to have grown into one of the leading specialist recruitment companies in Hungary.

How we can help you

We offer tailor-made permanent, temporary and executive recruitment services. Our passion lies in helping organisations find the right talent – quite simply, we power the world of work.

20

AREAS OF SPECIALISM

33

COUNTRIES WORLDWIDE

7,800

EMPLOYEES WORLDWIDE

55,000

PERMANENT CANDIDATES PLACED IN 2012

182,000

PEOPLE PLACED INTO TEMPORARY ASSIGNMENTS IN 2012



ACCOUNTANCY & FINANCE TALENT FOR SHARED SERVICES

Although professionals are reluctant to move, there is still steady recruitment activity for top finance talent, particularly in the manufacturing, shared services and pharmaceutical sectors.

There is little movement in the jobs market, as specialists and executives in these sectors are reluctant to change jobs due to the instability and lack of future prospects in 2013. Given the additional financial burdens imposed on the private banking sector, the main market players cannot forecast growth and are only able to plan quarterly. The private banking sector has been particularly hit, with a significant number of unemployed.

The production sector, however, is still growing: Budapest, central and western Hungary continue to attract investment, including capacity expansion and the building of new plants. Thanks to these trends, companies are on the lookout for senior financial experts. These individuals need to be flexible regarding location, which can be an issue, particularly in non-urban areas.

Finance talent required for SSCs

Candidates have to be aware of the huge expansion of the business services sector, as the majority of Hungarian Shared Service Centres (SSCs) focus on finance related processes. Although this makes the sector especially attractive to new graduates and junior candidates,

more experienced professionals without previous SSC experience have to decide whether to change their career path or face difficulties trying to find a suitable role outside of the sector.

Executive finance professionals are also impacted by this trend, as prior SSC experience is a great asset for successful job applications. As the whole finance sector is influenced by the growing market share of SSCs, a number of senior level experts are now finding themselves with jobs that come with lower levels of responsibility if their employer decides to set up a shared service centre within the organization.

The pharmaceutical sector continues to offer enticing career opportunities for finance professionals. Financial roles in this sector are very closely connected to business results and so carry high levels of responsibility and with it, greater financial rewards. However, it is difficult for candidates with no previous Pharma or FMCG experience to enter the sector.



TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Accountancy & Finance sector.

The salary ranges of different positions are influenced by the responsibilities of the role, industry, region, need of travelling and benefits.

ROLE	MINIMUM	MAXIMUM	TYPICAL
Audit Assistant (Fresh Graduate)	250.000	300.000	275.000
Audit Senior (3+ years)	500.000	650.000	550.000
Audit Manager (5+ years)	650.000	900.000	800.000
Audit Partner (7+ years)	1.000.000	1.700.000	1.500.000
Junior Controller (Fresh Graduate)	250.000	350.000	300.000
Controller (1-3 years)	350.000	500.000	450.000
Senior Controller (3+ years)	500.000	800.000	650.000
Head of Controlling (5+ years)	650.000	1.100.000	900.000
Accountant Fresh Graduate	250.000	300.000	270.000
Accountant with experience (1-3 years)	350.000	450.000	400.000
Senior Accountant (3- 5 years)	550.000	750.000	600.000
Chief Accountant (5+ years)	650.000	850.000	700.000
CFO (10+ years)	1.000.000	1.500.000	1.200.000
Credit Collector (1-3 years)	300.000	500.000	400.000
Senior Credit Collector (3+ years)	500.000	750.000	600.000
Payroll Specialist (1-3 years)	250.000	450.000	350.000
Payroll Team Leader (5+ years)	650.000	800.000	700.000
Junior Analyst Fresh graduate	250.000	300.000	280.000
Analyst (1-3 years)	300.000	450.000	400.000
Senior Analyst (3+ years)	550.000	800.000	650.000
Cost Manager (5+ years)	650.000	800.000	700.000
Tax Advisor (1-3 years)	350.000	470.000	400.000
Tax Supervisor (3+ years)	550.000	650.000	600.000
Tax Manager (5+ years)	700.000	900.000	800.000
Regional Finance Director	1.200.000	1.800.000	1.500.000



BUSINESS SERVICES INVESTING IN PEOPLE

Hungary continues to remain one of the most attractive locations for potential investment in the larger region, with Shared Service Centres (SSCs) established locally usually supporting the EMEA region.

A sector manifesting dynamic growth, Business Services is the biggest market segment for fresh graduates and junior professionals in Hungary, primarily in the areas of finance and accounting, customer services, for IT helpdesk and IT development roles and, to a lesser extent, sales, procurement and HR support.

From a candidate perspective, Hungary has a continuous pool of well-qualified multilingual professionals with the skill sets required by business services companies. SSCs usually provide excellent working conditions and an international work culture, which drives the need for professionals with matching ambitions.

Becoming an employer of choice

With such a competitive jobs market, a suitably qualified candidate can typically juggle multiple offers when looking for a career opportunity. This in turn drives up salaries, as companies try to secure the best talent. For jobseekers, a powerful and engaging talent management strategy can often be a decisive factor when choosing between potential employers.

We predict increasing demand for French and German speaking candidates in 2013, as these markets require ever more business support from service centres. The same applies for 'less popular' languages such as Arabic, Turkish, Norwegian, Hebrew, and Danish. We are also seeing a noticeable change in senior roles, whose remit now includes regional responsibilities and an ability to generate business.



TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Business Services sector.

Salary levels are also influenced by language requirements. Each additional language increases salary by 20.000-30.000 HUF (gross).

ACCOUNTANCY AND FINANCE		
ROLE	0-2 YEARS OF EXPERIENCE	3-5 YEARS OF EXPERIENCE
AP Clerk	245-305.000	320-380.000
AR Clerk	245-305.500	320-380.000
AP Senior Clerk	N/A	340-400.000
AR Senior Clerk	N/A	340-400.000
GL Accountant	260-350.000	340-550.000
Senior GL Accountant	N/A	360-600.000
AP Team Leader	N/A	360-500.000
GL Team Leader	N/A	380- 650.000
Intercompany Accountant	N/A	450-550.000
AP/P2P Manager	N/A	650-1.000.000
AR/O2C Manager	N/A	650-1.000.000
GL/R2R Manager	N/A	650-1.000.000

HR		
ROLE	0-2 YEARS OF EXPERIENCE	3-5 YEARS OF EXPERIENCE
HR Direct Advisor	250-350.000	356.7-435 000
HR Payroll Specialist	260-370.000	380-480.000
Compensation and Benefit Specialist	260-370.000	410-500.000
Supervisor	N/A	500-610.000
Team Leader	N/A	550-650.000
Transition/Process Owner	N/A	550-750.000

IT AND HELPDESK

ROLE	0-2 YEARS OF EXPERIENCE	3-5 YEARS OF EXPERIENCE
1st Level IT Help Desk	260-350.000	360-400.000
2nd Level IT Help Desk	260-350.000	360-400.000
3rd Level IT Help Desk	Min. 2 years' experience: 360.000+	400-500.000
Supervisor	N/A	550-650.000
Team Leader	N/A	500-650.000
Quality Manager	N/A	470-650.000
Transition/Process Owner	N/A	550-750.000

CUSTOMER SERVICE

ROLE	0-2 YEARS OF EXPERIENCE	3-5 YEARS OF EXPERIENCE
Customer Service Representative	260-360.000	360-440.000
Customer Service Supervisor	N/A	530-650.000
Customer Service Team leader	N/A	550-600.000
Transition/Process Owner	N/A	600-750.000

CUSTOMER SERVICE

ROLE	5-7 YEARS OF EXPERIENCE	7+ YEARS OF EXPERIENCE
Operations Director/Head of SSC	850.000-1.000.000	1.032.400-1.232.500
HR Director	610.000-800.000	780.000-900.000
Finance Manager	1.000.000-1.600.000	1.500.000-2.000.000
IT Manager	900.000-1.000.000	1.000.000-1.500.000
Operations Support Manager	460.000-550.000	550.000-650.000
Project Manager	900.000-1.200.000	1.189.000-1.550.000
Transition Manager	800.000-1.100.000	1.100.000-1.550.000
Training Manager	580.000-680.000	680.000-725.000
HR Manager	670.000-1.000.000	1.000.000 -1.550.000





CONSTRUCTION TALENT DEMAND FOR SPECIALISTS

Although there are many good candidates in the market, the best professionals are quickly snapped up by companies and thus are not actively looking for a job. This has been particularly evident for leasing, facility, asset management and site manager positions.

As this market is likely to continue facing challenges throughout 2013, new vacancies are expected to focus on cost optimization and the acquisition of new clients or projects, such as facility, property and leasing, from middle to senior level roles.

However we have seen some positive signs in the retail property market, in contrast with the construction sector, which is not yet showing similar signs. As a result, salary ranges have largely been stagnating during the past year.



TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Construction & Property sector.

The salary ranges of different positions are influenced by the responsibilities of the role, industry, region, need of travel and benefits. Junior positions generally require 1-3 years of experience. Mid- and senior level positions require at least 4-5 years of experience.

ROLE	MINIMUM	MAXIMUM	TYPICAL
Site Manager (Junior, Senior, Mid-level)	400.000	1.000.000	600.000
Development Manager	900.000	1.400.000	1.100.000
Junior Project Manager (Construction)	300.000	400.000	350.000
Project Manager/Senior Project Manager (Construction)	600.000	1.000.000	800.000
Construction Project Manager (Construction)	1.000.000	1.400.000	1.100.000
Junior Facility Manager	280.000	380.000	350.000
Facility Manager/Senior Facility Manager	600.000	950.000	800.000
Shopping Mall Manager	1.000.000	1.400.000	1.200.000
Junior Leasing Manager	300.000	400.000	350.000
Leasing Manager/Senior Leasing Manager	750.000	1.300.000	900.000
Junior Property Manager	300.000	350.000	325.000
Property Manager/Senior Property Manager	700.000	1.100.000	900.000



ENGINEERING COMBATING SKILL SHORTAGES

The main areas of manufacturing and engineering in Hungary comprise automotive, electronics contractors, consumer electronics and metal fabrication.

The automotive sector continues to hire high numbers of engineering professionals, such as quality engineers, electrical engineers and production specialists to work at the main automotive hubs in Hungary, which are mostly located in western and central Hungary. There is strong demand for experts with 1-3 years' experience who can speak English at least at an intermediate level and these experts can expect 20-30% salary increases on average. Given the candidate-driven nature of the market, this puts upward pressure on wages, especially when there is a need to commute or even relocate.

The electronics sector is also a strong performer for the Hungarian economy. However, some of the international manufacturing contractor companies cut back their operations or even left the country due to the fast changing trends in this sector and in technology. Even though some players pulled out of the country, professionals previously employed by these companies can easily find employment with other electronics goods manufacturers. In our experience, salaries tend to be lower in this area than in the automotive field.

Recruitment challenges for organisations

Hungarian metal fabrication suppliers are highly valued by their customers. We have seen an increase in initiatives both by the government and its partners which aim

to further develop the quality and volume of their production activities. These companies are ready to take on professionals with a good manufacturing background, or even fresh graduates, with no pre-requisite for foreign languages, albeit paying lower salaries than large multinationals.

What recruitment trends are we seeing?

Various positions tend to remain unfilled for more than three months, especially at large manufacturing hubs throughout the country or isolated plants. This poses challenges to companies both from an HR and growth perspective. There are several reasons for this: 1) the salary cycle mentioned above, 2) the shortage of engineers in the market and 3) locations are not attractive enough to motivate experts to relocate. It is worth pointing out that the skills shortages apply to the manufacturing industry, which again halts development.

Since this has become a candidate-driven market, individuals have multiple options during the job seeking phase, and so companies wishing to attract the best talent have to speed up their recruitment processes to not lose out on the right talent, which is why they often prefer to rely on the services of a reputable specialist recruitment partner.



TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Engineering sector.

The salary ranges of different positions are influenced by the responsibilities of the role, industry, region, need of travel and benefits.

ROLE	JUNIOR ENGINEER 1+ YEAR EXPERIENCE			SENIOR ENGINEER 3+ YEARS EXPERIENCE			TEAM LEADER 5+ YEARS EXPERIENCE		
	MIN	MAX	TYPICAL	MIN	MAX	TYPICAL	MIN	MAX	TYPICAL
Production	300.000	350.000	320.000	320.000	550.000	420.000	550.000	850.000	650.000
Quality	300.000	350.000	320.000	320.000	550.000	420.000	550.000	750.000	650.000
Maintenance	300.000	330.000	300.000	300.000	500.000	400.000	500.000	850.000	650.000
R&D	300.000	320.000	300.000	300.000	550.000	400.000	500.000	850.000	700.000
Project Engineering	300.000	320.000	310.000	300.000	500.000	450.000	550.000	900.000	750.000
Service Engineering	300.000	320.000	310.000	300.000	500.000	450.000	500.000	800.000	700.000
Expert in specific technology	300.000	350.000	320.000	350.000	550.000	500.000	550.000	800.000	700.000

ROLE	10+ YEARS EXPERIENCE TOP TECHNICAL MANAGEMENT		
	MIN	MAX	TYPICAL
Production	800.000	1.500.000	1.100.000
Quality	800.000	1.400.000	1.000.000
Maintenance	900.000	1.400.000	1.000.000
R&D	900.000	1.500.000	1.100.000
Project Engineering	800.000	1.300.000	1.100.000
Service Engineering	700.000	1.300.000	1.000.000
Expert in specific technology	700.000	1.500.000	1.100.000



HOTEL & LEISURE RETAINING TOP TALENT

We are seeing some positive signs for the travel industry after the recession years. Major global hotel brands are the strongest players in the local market, relying heavily on developing their existing workforce for internal promotions.

However, they face problems finding the right talent due to the Hungarian workforce often being inflexible in terms of for example relocation, which is a crucial factor in the sector because some of the wellness and spa facilities are located outside of major cities.



TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Hotel & Leisure sector.

ROLE	MINIMUM	MAXIMUM
Front Office Manager	320.000	550.000
FO Supervisor	165.000	280.000
FO Agent/Receptionist	130.000	330.000
Executive Lounge Agent	140.000	190.000
Guest Relation Clerk	140.000	230.000
Telephone Operator	130.000	220.000
Executive Housekeeper	320.000	870.000
Assistant Executive Housekeeper	260.000	450.000
Restaurant Manager	230.000	570.000
Restaurant Supervisor	160.000	350.000
Reservation Manager	280.000	600.000
Reservation Supervisor	210.000	290.000
Reservation Agent	150.000	215.000
Event Manager	300.000	380.000
Event Executive	210.000	280.000
Event Coordinator	170.000	280.000
Spa Manager	500.000	600.000
Assistant Spa Manager	220.000	280.000
Spa Receptionist	135.000	180.000
Masseur	240.000	350.000



INFORMATION TECHNOLOGY NICHE SKILLS REQUIRED

This is one of the market segments in which Hungary is steadily moving ahead and hiring experts. Although some companies have downsized their teams, many software development companies are expanding and looking for new people to join their organisations.

On the candidate side, junior candidates with up to one year's experience are becoming increasingly aware of the value of their specialist skills and are therefore raising their salary requirements by an average of 8-10% compared to 2012.

IT companies on the other hand are now also starting to pay more attention to the importance of salary ranges across all levels, and we have seen a greater degree of openness and flexibility, bringing salary offers closer to candidates' expectations to secure the best talent, having acknowledged the primary importance of certain skills sets for long-term business growth.

Demand for niche technical skills

Companies are also scrutinising the length of selection processes as well so as not to lose out on talent, aiming to optimize processes to achieve efficiency. To this end, they tend to look for candidates with niche technical skills, who are difficult to find.

Most sought-after skills in the current market include Java and .Net. Despite the fact that trends have reversed in recent months, demand is still high for C++ language and ASP.Net knowledge. There has also been a growing demand for IT security solutions, which is a trend we envision holding up in the coming years. We also expect to see a growing demand for mobile application development skills.

Overall, there has been a continuously increasing need for IT experts with certain specialist skills in the Hungarian market compared to the post-recession years, reflecting a positive outlook and projections of expansion for the industry throughout 2013. We began to see a positive pick-up in the second half of 2012, as well-known major players started to roll out new volume projects.



TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Information Technology sector.

HELPDESK

ROLE	MINIMUM	MAXIMUM	TYPICAL
L1 (Outlook or other technical)	280.000	380.000	350.000
L2 (Outlook, Lotus)	350.000	450.000	420.000
Helpdesk Team Leader	450.000	550.000	500.000

SOFTWARE DEVELOPMENT

ROLE	MINIMUM	MAXIMUM	TYPICAL
Junior Software Developer	290.000	420.000	300.000
Software Developer (3+ years)	450.000	650.000	550.000
Senior Software Developer (min. 3-4 years)	550.000	800.000	650.000
Development Lead	750.000	1.300.000	850.000

SOFTWARE TESTING

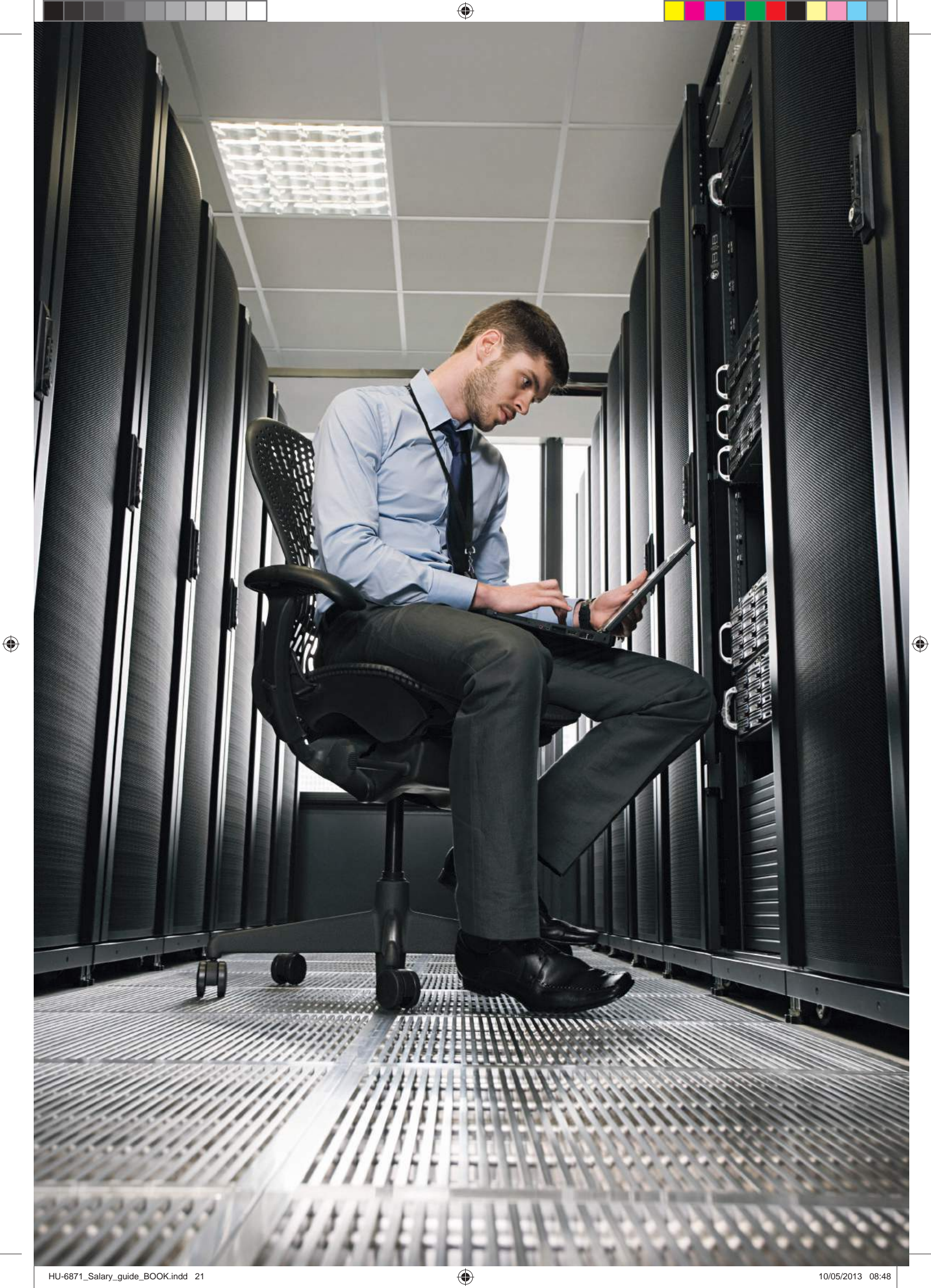
ROLE	MINIMUM	MAXIMUM	TYPICAL
Junior Software Tester (min. 1 year)	250.000	400.000	380.000
Software Tester (3+ years)	350.000	550.000	450.000
Senior Software Tester (min. 3-4 years)	500.000	650.000	560.000
Test Lead/Test Manager	600.000	1.000.000	700.000

INFRASTRUCTURE

ROLE	MINIMUM	MAXIMUM	TYPICAL
Network Engineer	550.000	700.000	600.000
System Engineer	500.000	700.000	600.000



ROLE	MINIMUM	MAXIMUM	TYPICAL
Database Developer (Oracle, PLSQL) (Mid to Senior)	450.000	750.000	650.000
Security Expert (Mid to Senior)	550.000	1.100.000	900.000
System Administrator	300.000	450.000	400.000
Business Analyst (Junior)	350.000	500.000	450.000
Business Analyst (Senior)	700.000	1.000.000	900.000
SAP Consultant	800.000	1.200.000	1.100.000
Project Manager	650.000	1.100.000	900.000
Technical Writer (min. 1 year's experience)	280.000	450.000	320.000





LIFE SCIENCES FOCUS ON VARIABLE BENEFITS

With several companies downsizing and a shift from candidate to job-led in some technical areas of the market, 2013 is set to be a tough year.

While there are limited opportunities in the commercial pharmaceuticals sector, Hungary is still an attractive location for clinical research, which is our strongest area, and exposure in the medical device sector is increasing, followed by other technical areas such as medical and regulatory affairs as well as quality assurance.

In clinical research, the dramatic increase in salaries that we witnessed in the past years has slowed down in 2012 due to an excess supply of jobs. However, salary levels in this area are still competitive in the region and still increasing, albeit at a slower pace, in contrast with salaries for pharmaceutical commercial operations positions, which have plateaued or even slightly decreased due to a higher unemployment rate in this area.

The marginal increase of salaries in clinical research in Eastern Europe is also a result of the transition period of some clinical outsourcing global agreements between pharmaceuticals and Clinical Research Organisations (CROs) ending during 2012, balancing out supply and demand. Employers are therefore more likely to be able to choose from a larger pool of candidates in this area, which will help keep average salary levels flat in 2013.

Rise of flexible hours and homeworking

In the field of medical device, wages have stayed at 2012 levels overall. The organizational structure of medical device companies is different to pharmaceutical organizations, and the functional verticals are often covered regionally, which makes graded salary brackets harder to define. In the case of high value products, such as imaging diagnostics, professionals are rewarded by a higher remuneration package than in the consumables and disposables sector.

While wages in medical and regulatory affairs have largely stayed at 2012 levels, the non-financial parts of remuneration packages, such as company cars, for regulatory affairs and quality assurance, can make a significant difference as to the attractiveness of compensation packages.

In the case of non-field positions, professionals increasingly value flexible hours and homeworking, which, along with other non-financial benefits, are becoming ever more important to attract top talent. This is particularly important in those technical areas where salary levels have undergone modest or little movement in the past year, as in our experience employers tend to show less willingness to hire passive job seekers through salary increases than for example in the clinical development arena.

TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Life Sciences sector.

IN AN INTERNATIONAL CRO - HUNGARY			
ROLE	MINIMUM	MAXIMUM	TYPICAL
Clinical Research Associate I (upto 1 year's experience)	500.000	650.000	550.000
Clinical Research Associate II (2-3 years)	650.000	900.000	750.000
Senior Clinical Research Associate (3+ years)	900.000	1.050.000	950.000
Clinical Team Leader (Lead CRA)	1.000.000	1.100.000	1.050.000
Clinical Operations Manager (Line Manager)	1.100.000	1.400.000	1.200.000
Clinical Project Manager	1.100.000	1.500.000	1.300.000
Clinical Operations Director	1.500.000	2.000.000	1.750.000
Medical Monitor	800.000	1.100.000	1.000.000
Medical Director	1.300.000	1.600.000	1.450.000

IN A LOCAL CRO - HUNGARY			
ROLE	MINIMUM	MAXIMUM	TYPICAL
Clinical Research Associate I (up to 1 year's experience)	450.000	550.000	500.000
Clinical Research Associate II (2-3 years)	550.000	700.000	625.000
Senior Clinical Research Associate (3+ years)	700.000	900.000	800.000
Clinical Team Leader	900.000	1.200.000	1.050.000
Clinical Operations Manager	900.000	1.200.000	1.050.000
Clinical Project Manager	1.000.000	1.300.000	1.150.000

IN A PHARMA COMPANY - HUNGARY

ROLE	MINIMUM	MAXIMUM	TYPICAL
Clinical Research Associate (up to 3 years)	550.000	750.000	650.000
Senior Clinical Research Associate (3+ years)	750.000	900.000	850.000
Clinical Team Leader (Lead CRA)	900.000	1.000.000	950.000
Clinical Operations Manager (Line Manager)	1.000.000	1.300.000	1.150.000
Clinical Project Manager	1.000.000	1.300.000	1.150.000
Sales Representative - Pharmacy	300.000	450.000	375 000
Medical Representative - GP line/Mixed	350.000	550.000	450.000
Medical Representative Specialist Line	450.000	700.000	575 000
Key Account Manager	650.000	1.000.000	800.000
Product Manager	750.000	1.100.000	925 000
Business Unit Head	1.200.000	1.700.000	1.450.000
Marketing Manager	1.200.000	1.700.000	1.450.000
Area Sales Manager	700.000	1.000.000	850.000
National Sales Manager	1.000.000	1.500.000	1.250.000
Medical Science Liaison	700.000	850.000	800.000
Medical Advisor	850.000	1.000 000	950.000
Senior Medical Advisor	1.000 000	1.250.000	1.150.000
Medical Director	1.400.000	2.000.000	1.750.000
Regulatory Affairs Specialist	450.000	700.000	600.000
Regulatory Affairs Manager	700.000	900 000	800.000
QA Pharmacist	550.000	700.000	625.000
Head of QA (QP)	900.000	1.200.000	1.050.000
Drug Safety Specialist	450.000	650.000	550.000
Drug Safety Manager (QPPV)	800.000	1.200.000	1.000.000



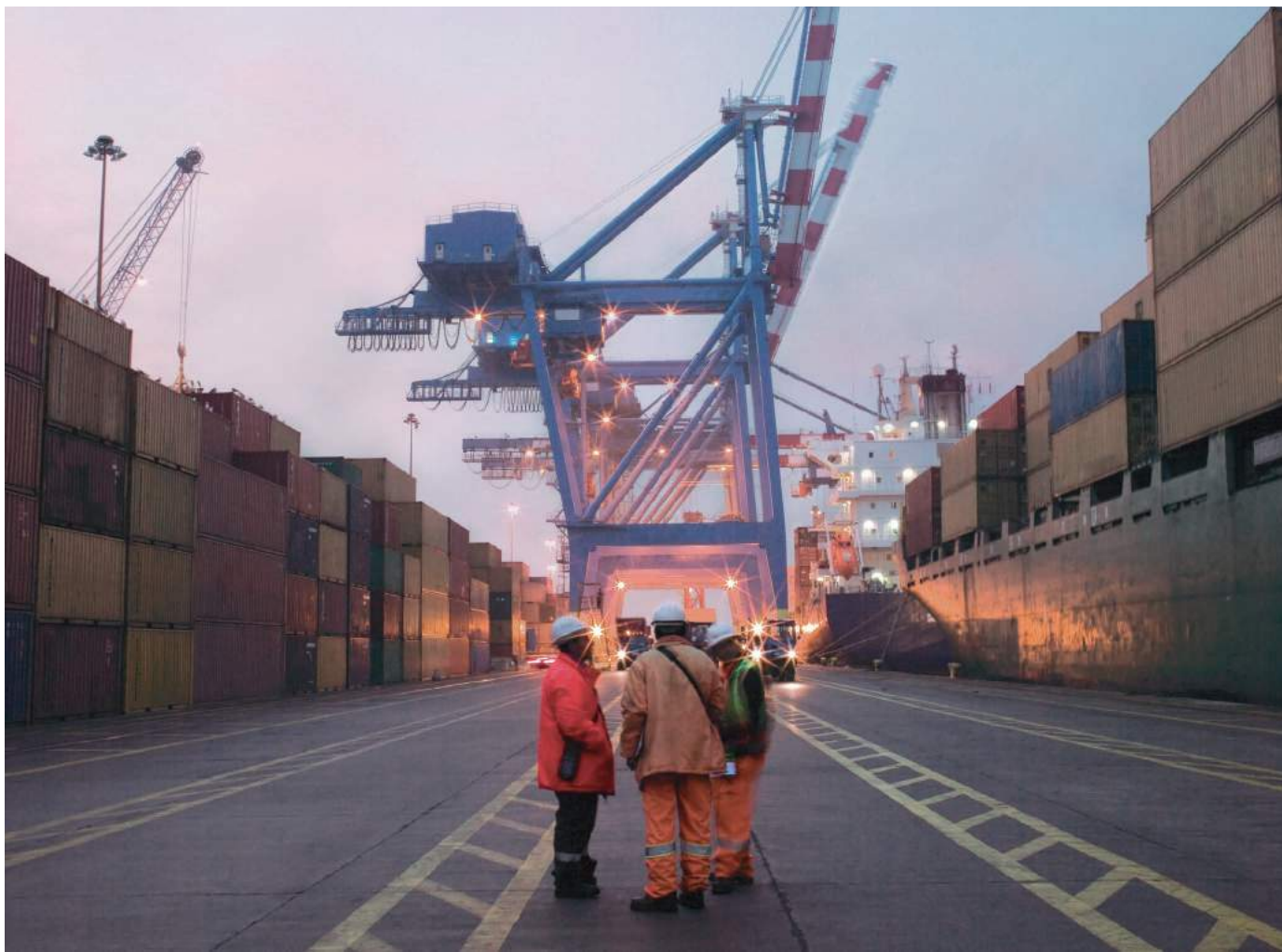
MEDICAL DEVICES

ROLE	MINIMUM	MAXIMUM	TYPICAL
Sales Representative	350.000	550.000	450.000
Sales Executive/Product Specialist	500.000	900.000	700.000
Business Development Manager	700.000	1.000.000	850.000
Service Engineer/Field Application Specialist	400.000	600.000	500.000
International Product Manager	800.000	1.200.000	1.000.000
International Sales Manager	1.000.000	2.000.000	1.500.000
Sales Support	400.000	600.000	500.000

IN PHARMACEUTICAL MANUFACTURING

ROLE	MINIMUM	MAXIMUM	TYPICAL
Quality Assurance Engineer	400.000	600.000	500.000
Quality Manager	700.000	1.000.000	850.000
Quality Control Analyst	400.000	500.000	450.000
Quality Control Manager	700.000	900.000	800.000
Process Development Specialist	500.000	700.000	600.000





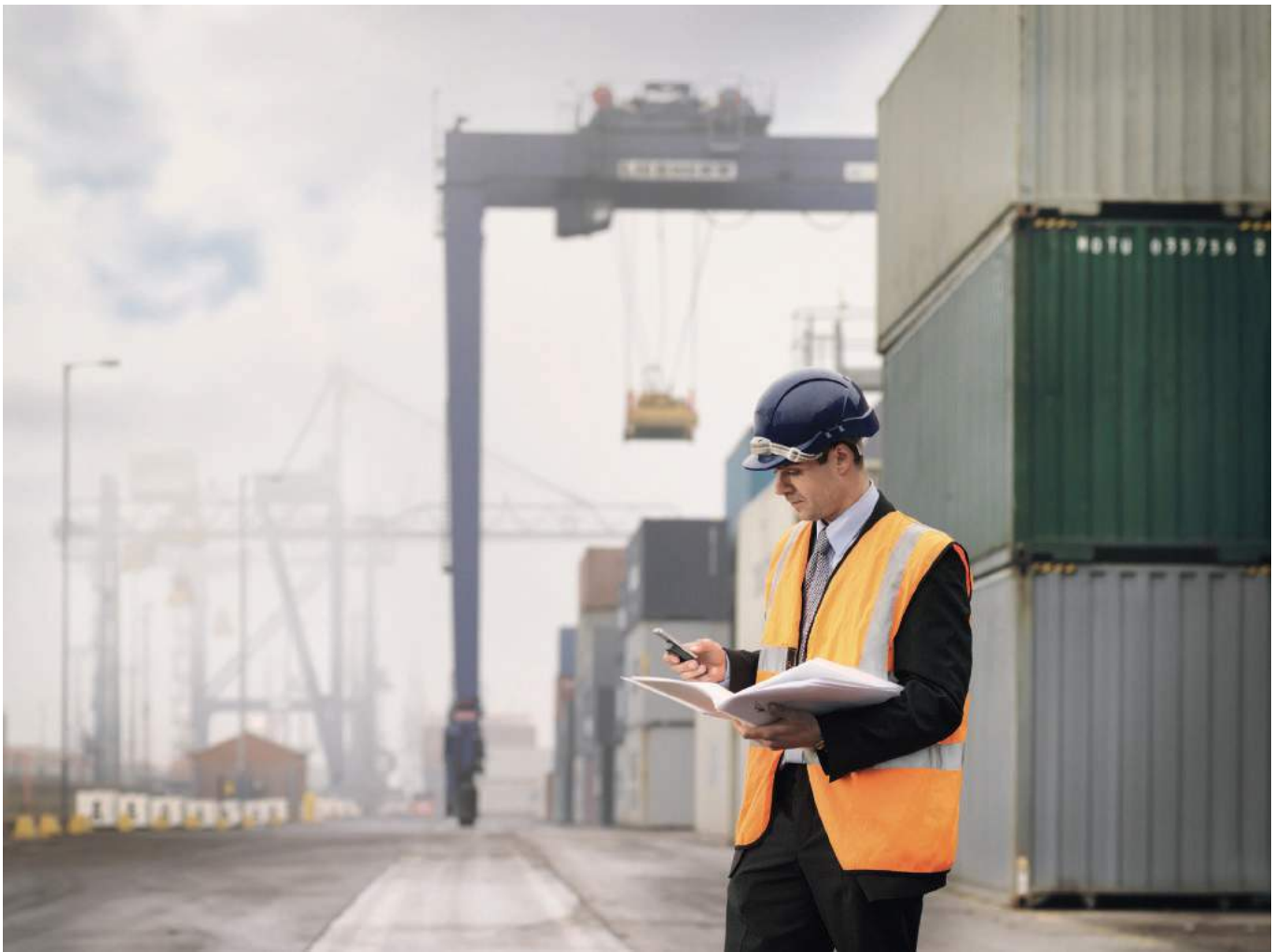
LOGISTICS REWARDING TOP PERFORMERS

Variable salaries are not common in the Logistics sector, and it is mostly executives who get to benefit from company cars.

Middle and senior level professionals are often rewarded with yearly bonuses. Average salary levels have shown modest increases, but most companies have focused on cost efficiency, which has impacted wages.

Professionals who speak English or German fluently can expect better career opportunities and somewhat higher salaries.





TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Logistics sector.

ROLE	MINIMUM	MAXIMUM	TYPICAL
Supply Chain Coordinator	280.000	380.000	350.000
Logistics Specialist	300.000	500.000	400.000
Logistics Manager	600.000	1.000.000	800.000
Supply Chain Manager	800.000	1.600.000	1.100.000
Warehouse Shift Leader	200.000	400.000	300.000
Warehouse Manager	500.000	900.000	750.000
Distribution Centre Manager	900.000	1.600.000	1.200.000





RETAIL REGIONAL IN SCOPE

Recruitment in the sector remains steady, with demand right across the board, from sales assistants to country managers.

Retailers rely on specialist recruitment expertise to search for mid-level experts such as department managers, deputy managers and store managers. Although the demand centres around Budapest, retail chains are also recruiting for their regional outlets.

Salary ranges vary greatly from company to company and are also heavily influenced by store attributes, mainly store size. For example, an assistant store manager's monthly gross salary can vary between HUF 250,000 and HUF 450,000 plus bonuses such as luncheon vouchers, work uniform and company discounts.

Fashion moves fast

Due to the 'plaza stop' being in force until 2014, major retail developments are not likely to happen in the upcoming two years. Some smaller fashion retailers have closed their operations or downsized their smaller branches, concentrating on their prime city centre flagship stores.

However, the dominant players of the fast fashion field are prospering and expanding continuously, not only in the capital but in some major rural cities. Furthermore, the introduction of the 'plaza stop' also has seen a positive impact for existing shopping centres, as the fierce competition from new projects has subsided.

While experienced and well-qualified retail experts are in demand, there is a general lack of high calibre specialists despite the excess supply of candidates. Client requirements for mid-level retail positions are very exact, usually asking for higher education and English fluency, at least to an intermediate level – these two criteria are often not met simultaneously. Clients are also looking for passionate individuals, people that are genuinely dedicated to their brand.

Retailers have been focusing on cost efficiency measures during the crisis, which has resulted in a greater requirement for temporary staff and for talent that can thrive in multifaceted and highly demanding roles.





TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Retail sector.

ROLE	MINIMUM	MAXIMUM	TYPICAL
Area Manager	650.000	800.000	700.000
Retail Manager	300.000	750.000	450.000
Area Visual Merchandiser	300.000	600.000	450.000
Store Manager	290.000	650.000	350.000
Assistant Store Manager	250.000	450.000	280.000
Department Manager	200.000	450.000	250.000
Visual Merchandiser	220.000	480.000	280.000
Sales Assistant	150.000	350.000	180.000





SALES & MARKETING BUILDING A STRONG BRAND

Although we have observed a decreasing trend in brand manager salaries at major FMCG companies, the demand for these professionals from sales or trade marketing backgrounds has increased.

We have also seen a growing requirement for category and trade marketing managers, which underlines the growing demand for marketing specialists.

As for fresh graduates and junior marketing professionals, organisations are not willing to offer significantly higher salaries than in 2012, resulting only in slight wage increases (in line with inflation) for junior marketing professionals.

There has been some variation in compensation packages, particularly in the benefit mix, depending on the company and specialisation. For example, brand managers usually do not receive a company car as part of the package while trade marketing and senior marketing experts however often do.

Furthermore, to offset lower base salaries, companies tend to use the variable part of remuneration as a motivational factor to attract talent in these areas. In addition, an average yearly bonus of 8-15% often comes with the compensation package.

Premium paid for language skills

Salary levels for sales roles largely depend on the industry and on candidates' technical qualifications, which is reflected in the base salary. More senior positions command higher base salaries and a lower variable component. For example, a mid-level sales manager's compensation package typically consists of either a 50:50 or 70:30 base to variable ratio.

Companies are more likely to be flexible with senior and executive level professionals – company cars are standard for senior salespeople whereas sales representatives, who in most cases need to have their own car, are not provided with one.

Professionals who speak English or German fluently can expect better career opportunities and somewhat higher salaries.



TYPICAL SALARY RANGES

Basic HUF monthly gross salaries in Hungary for full-time positions in the Sales & Marketing sector.

MARKETING			
ROLE	MINIMUM	MAXIMUM	TYPICAL
Marketing Assistant	240.000	300.000	280.000
Junior Brand Manager	280.000	450.000	380.000
Brand Manager	380.000	550.000	450.000
Senior Brand Manager	550.000	750.000	650.000
Marketing Manager	750.000	1.000.000	850.000
Trade Marketing Specialist	380.000	500.000	420.000
Trade Marketing Manager	450.000	650.000	550.000

SALES			
ROLE	MINIMUM	MAXIMUM	TYPICAL
Sales Assistant	240.000	350.000	280.000
Inside Sales Coordinator	260.000	380.000	300.000
Sales Representative	240.000	400.000	350.000
Key Account Manager	450.000	900.000	650.000
Area Sales Manager	380.000	700.000	550.000
National Sales Manager	500.000	700.000	600.000
Sales Director	800.000	1.500.000	1.200.000
International Sales Director	1.200.000	2.000.000	1.600.000
Sales Engineer	450.000	900.000	650.000

PURCHASING			
ROLE	MINIMUM	MAXIMUM	TYPICAL
Purchasing Assistant	250.000	330.000	300.000
Purchasing Coordinator	280.000	380.000	350.000
Purchaser/Buyer	400.000	800.000	500.000
Purchasing Manager	750.000	1.100.000	850.000

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