

Significant management changes in the first half of 2020

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What have we Learned from COVID 19?



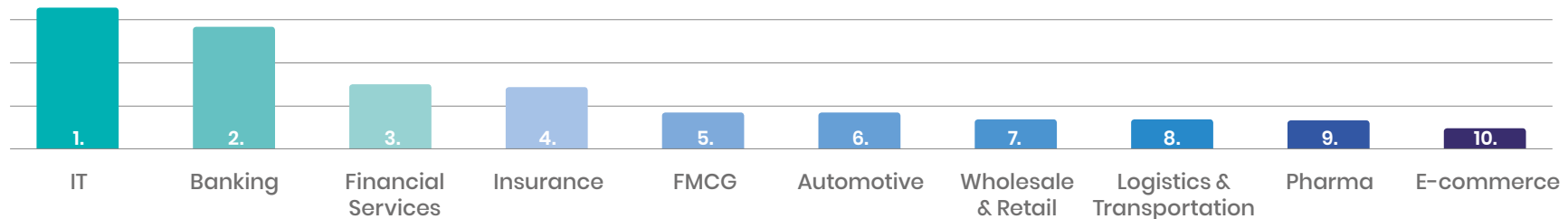
Key Findings January – June 2020

1 The total number of management changes **remains the same** compared to 2019 (381 in 2020 vs. 373 in 2019). **General Management, Sales, and HR** had the highest number of changes.
(slide 4)

2 The shift in hiring expectations. 75 % of managers consider **flexibility and mindset more important than technical skills** or expertise.
(slide 8)

3 Increase in internal promotions (in 2 % compared to last year) **33 % of executives** who got their job in the 1st half of 2020 **were promoted internally**.
(slide 6)

Industries with the highest number of management changes

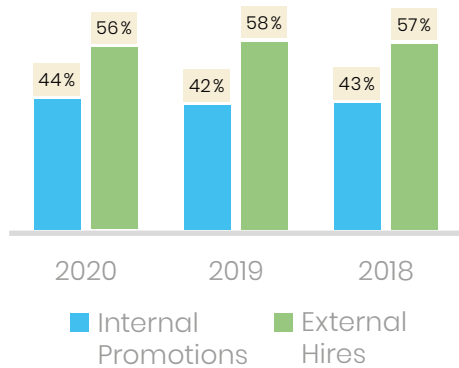


Companies with the highest number of management changes



Hiring Trends in Time

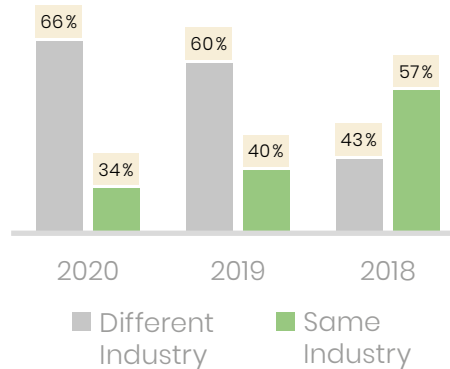
* Internal Promotions vs. External Hires



- Increase in internal promotions
- Facility, Machinery, Construction and Engineering Companies – the highest number of internal promotions

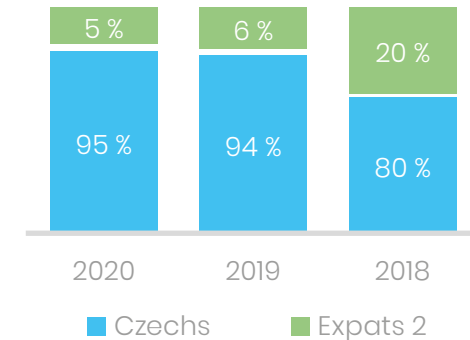
* January – June 2020, 2019, 2018

Cross – Industry Changes



- Cross-industry changes: **increase in 6 %** compared to 2019.
- Pharmaceutical Industry – more flexible – **17 % more hires from other industries** compared to 2019
- Automotive and Logistics remain conservative
- IT, Banking and e-commerce remain flexible

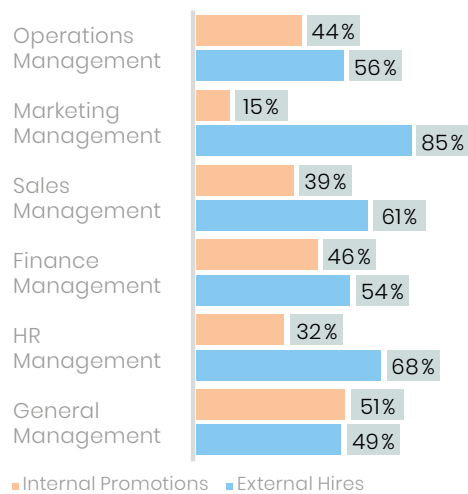
Expats vs Czechs in top management



- The number of expats in top management positions **declines (5 % of all changes)**
- Financial Services and IT – industries with the highest number of expats

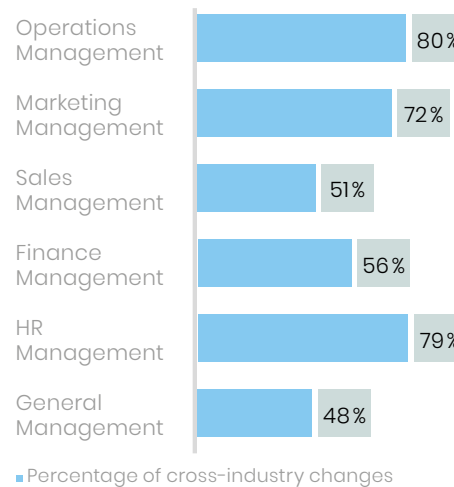
Roles – Key Facts

Internal Promotions vs. External Hires



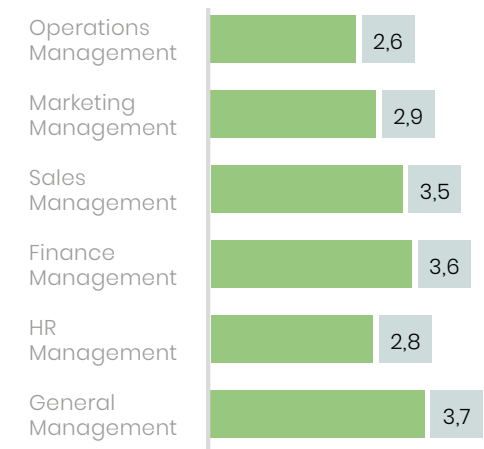
Marketing, HR and Sales roles dominate with **external hires**

Cross-Industry Changes



Operations, HR Management and Marketing Management dominate with **cross-industry hires**

Average Length in the Previous Role (in years)



Finance roles remained in the previous role **the longest** while **Operations roles** remain **the shortest**

Which industries hired the most?

Operations Management |> **BANKING**
Marketing Management |> **FMCG/WHOLESALE & RETAIL**

Sales Management |> **IT**
Finance Management |> **REAIL ESTATE/FINANCIAL SERVICES**

HR Management |> **BANKING**
General Management |> **IT/FMCG/WHOLESALE & RETAIL**

Overview of Top Changes

General Management

(Alphabetical order)

COMPANY	NAME	POSITION
ABB	Vítězslav Lukáš	CEO
AbbVie	Adriana Stará	General Manager Allergan Aesthetics
Atlas Copco	Stanislav Stodůlka	General Manager EMEA
Atos IT Solutions	Vladek Šlezinger	VP,CEO
Baxter	Filip Fijalkowski	General Manager CZ/SK
British American Tobacco CZ/SVK	Štěpán Michlíček	General Manager
ČSOB Factoring	Barbara Řimánková	CEO
Deloitte Central Europe	Jaroslav Škvrna	CEO
Emco	Martin Jahoda	CEO
Expobank	Lubomír Lízal	Chairman of the Board
G4S	Radek Mráz	CEO
HomeCredit Group	Jean Pascal Duvieusart	CEO
Kiekert AG	Petr Kuchyňa	General Manager
Konica Minolta IT Solutions	Martin Pondělíček	Executive Director
Lafarge Cement	Miroslav Kratochvíl	General Manager
Lidl	Maksymilian Braniecki	CEO CZ, SVK, HU, RU, BU
MagnaPharm CZ/SK	Miroslav Karas	General Manager
Menzies Aviation	Jiří Petržílka	VP Czech Republic
Molson Coors	Zdeněk Havlena	CEO
Rixo.cz	Pavel Krbec	CEO
Rohlík CZ	Petr Pavlík	CEO
Rohlík DE	Erich Čomor	CEO
Wüstenrot	Andrew Gerber	CEO

HR Management

(Alphabetical order)

COMPANY	NAME	POSITION
Air Bank	Soňa Schwarzová	HR Director
Avast	Rebecca Grattan	Chief People and Culture Officer
Canon EMEA	Andrew Krenek	Regional HR Director
České dráhy	Monika Horáková	HR Director
ČSOB	Ondřej Vychodil	Executive Director, Human Resources
Diebold Nixdorf	Hana Štefanová	HR Director
Hello Bank	Vendula Ostrá	HR Director
Iron Mountain	Blanka Říhová	Senior HR Director EMEA
Makro Cash & Carry ČR	Radek Šrom	HR Director
Molson Coors	Ilona Kratochvílová	HR Director Central & Eastern Europe
Moneta Money Bank	Klára Escobar	HR Director
Raiffeisenbank	Dana Fajmonová	HR Director
Rohlík	Daniela Razimová	Group Chief People Officer
SAP	Ladislav Kučera	HR Director
Veolia	Jitka Schmiedová	HR Director CEE
W.A.G. Payments Solutions	Kristi Ansberg	Group Chief People Officer
WOOD & Company	Lucie Bergerová	HR Director

Overview of Top Changes

Operations Management

(Alphabetical order)

COMPANY	NAME	POSITION
Asa Abloy Group	Robert Müller	COO East Europe Commercial
ING bank	Martin Vurm	COO
Komerční banka	Jitka Haubová	Board Member
Wüstenrot	Jiří Huml	COO

Sales and Marketing Management

(Alphabetical order)

COMPANY	NAME	POSITION
ABB Robotics and Discrete Automation	Jan Kamenický	Global Head of Marketing and Sales
Arval	Jiří Havel	Sales Director
Jablotron Alarms	Ladislav Šilhán	Sales Director
Komerční banka	Hana Kovářová	Head of Brand Strategy and Communication
Mall Group	Jakub Štreščík	Sales Director
Pilulka.cz	Martin Navrátil	Chief Commercial Officer
PNS	Ondřej Vaňha	Vice-chairman of the Board
Raiffeisenbank	Filip Šanda	Brand Strategy & Communication Director
SECURITAS	Martina Němcová	Chief Sales Officer
Seznam.cz	Tomáš Bůřil	Commercial Director
STUDENT AGENCY	Petr Pěcha	Group Chief Sales and Digital Officer
T-mobile	Luboš Lukasík	Director Corporate and Government Segment
Uniq	Marek Bártek	Board Member, CSO
Vítkovice Steel	Tomáš Pogány	Sales Director

Finance Management

(Alphabetical order)

COMPANY	NAME	POSITION
ČSOB	Blanka Horáková	Executive Director for Finance
E.ON	Christian Leifeld	Board Member
Kooperativa	Christopher Rath	Board Member
mBank	Roman Fink	CFO CZ/SK
Raiffeisenbank	Tomáš Jelínek	Board Member
Rohlik	Sonia Slavtcheva	Group CFO
Sazka	Martin Klímek	CFO
Škoda Electric	Miroslav Prokop	Finance Director

Other Significant Changes

(Alphabetical order)

COMPANY	NAME	POSITION
Air Bank	Martina Kučerová	Head of Legal and Compliance
Asahi Breweries Europe	Reto U. Sahli	Chief Information Officer
Česká pošta	Martin Paruch	Director for Financial Services and Sales
ČSOB	Václav Potůček	Executive Director for Compliance
ČSOB Pojišťovna	Pavel Východský	Chief Information Officer
GasNet	Erika Vorlová	Chief Service Officer, Board Member
GasNet	Jiří Nováček	Chief Digital Officer
Intersnack	Martin Minář	Supply Chain Director CEE
Kooperativa	Martin Laur	Board Member
Metalimex	Karel Gerzicak	Group IT Director
Moneta Money Bank	Jakub Valenta	Director of IT Infrastructure & Change
SECURITAS	Jan Huml	CTO
Wüstenrot	Tomáš Černý	Director of Legal Department

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