Wage Index

Sector Analysis of the Netherlands

Prepared by
Central European Labour Studies Institute, Bratislava and
WageIndicator Foundation, Amsterdam

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WageIndicator Foundation
Plantage Muidergracht 12
1018TV Amsterdam
The Netherlands
office@wageindicator.org

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monsterboard.nl

Monsterboard
Say Building B
John M. Keynesplein 1
1066 EP Amsterdam
The Netherlands

About CELSI

Central European Labour Studies Institute (CELSI) is a non-profit research institute based in Bratislava, Slovakia. It fosters multidisciplinary research about the functioning of labor markets and institutions, organization of work, business ethics, and ethnicity and migration in the economic, social, and political life of modern societies.

CELSI
Central European Labour Studies Institute

Central European Labour Studies Institute (CELSI)
Zvolenská 29
821 09 Bratislava
Slovakia
www.celsi.sk
info@celsi.sk

Executive summary and key findings

The main purpose of this first Loonwijzer – Monsterboard Wage Index is to describe some of the key characteristics of the workforce in ten selected sectors of the Dutch labor market. We study the following sectors:

(i) Agriculture, nature, animals, environment,
(ii) Construction, fittings, and housing,
(iii) Education, research, and training,
(iv) Finance, banking, and insurance,
(v) Health care, paramedics, and laboratory,
(vi) Hospitality, tourism, leisure, and sports,
(vii) Industrial production, manufacture, and metal,
(viii) IT, automation, and telecommunications,
(ix) Marketing, PR, and advertising, and
(x) Transport, logistics, ports, and airports.

Levels as well as annual changes in key characteristics are studied in six focus areas:
(a) gross hourly wage and bonuses,
(b) gender pay gap,
(c) working hours and overtime,
(d) restructuring expectations and restructuring in the past 12 months,
(e) satisfaction with work in detail and
(f) satisfaction with life as-a-whole.

In the second chapter, we focus on developments in two sectors, Information and communication and Financial and insurance activities in the period from 2006 to 2011.

Finally, this report aims to compare wages on the worldwide basis in the last chapter. It focuses on 4 occupational groups across (up to) 23 countries:
1) managers
2) professionals
3) technicians and associate professionals,
4) and clerical support workers.

Some of the main findings include:

- *A moderate annual increase of the median gross hourly wage (1.4% - 6.8%) was experienced in each studied sector in 2011, except for Finance, banking and insurance sector where a negligible decrease of 0.6% was observed. Industrial production, manufacture, metal sector and Marketing, PR and advertising sectors show the highest increments in the median gross hourly wage at 6.8% and 6.0%, respectively.*
- *The percentage of employees at risk of poverty (low pay) decreased in all sectors with the exception of Construction, fittings and housing experiencing slight increase in 2011. This and the previous bullet point may indicate that workers placed lower in the wage distribution participated in the general wage growth more than proportionally. The highest proportion of workers at risk of poverty (low pay) in 2011 can be found in Hospitality, tourism, leisure and sport sector (26%) and Agriculture, nature, animals and environment sector (18%).*
- *According to the global comparison of wages in up to 23 countries and 4 occupational groups (1. mangers, 2. professionals, 3. technicians and associate professionals, 4. clerical support workers), taking into account different price levels in these countries, Dutch wages reach some of the highest positions in the world rankings of median gross and net hourly wages as well as in the world rankings of Big Mac wages.*
- *Moderate changes in the proportion of employees receiving various financial benefits were observed in 2011. The only bonus with increased incidence in 2011 in almost all sectors is holiday allowance received by 40% to 62% of employees. End-of-year bonus and performance bonus are the next most common bonuses, moreover showing large intersectoral differences in the percentage of employees receiving these benefits, ranging from 3% to 35% in 2011. This development in bonuses is consistent with the overall impression that the Dutch labor market was in relatively good condition in 2011 compared to 2010.*
- *Job security improved in 2011, i.e. a higher percentage of employees reported feeling of satisfaction with job security in all the studied sectors. At the same time, increased percentages of employees expressing eagerness to find a new job in the next 12 months are observed in a majority of studied sectors. This observation may herald more optimistic expectations and an increased dynamics in the Dutch labor market compared to 2010.*
- *Overall satisfaction with life exhibits very stable annual values. The percentage of employees satisfied with life as-a-whole changed only slightly or remained stable in all sectors in 2011. The highest percentage of satisfied employees (94%) can be found in Health care, paramedics, laboratory sector and Marketing, PR and advertising sector.*

The highest proportion of employees reported dissatisfaction in Transport, logistics, port, airport sector, and Hospitality, tourism, leisure, sports sector with 87% of satisfied employees.

- *Regarding developments in Information and communication sector, and Financial and insurance activities sector in the period of years 2006 – 2011, a significant worsening is observed in nominal wages, the incidence of employee bonuses, announcements of redundancies, training opportunities and the willingness to undergo restructuring after 2009, possibly resulting from the effects of the financial crisis and economic slow-down.*

The general impression is thus that the Dutch labor market was hit considerably harder than one might infer from the rather moderate, though slightly increasing between 2008 and 2010, unemployment rate. Adjustment seems to have occurred through wage moderation but also through rather significant cuts in employee benefits after 2008. Interestingly, fresh data for 2011 show that the trend might have reversed and the performance of the Dutch labor market in 2011 was significantly better than in 2010 for most indicators. This is consistent also with the reversal of the trend in the unemployment rate that slightly declined in 2011 compared to 2010 after three years of gradual increase.[1]

Sectoral analysis in this report is based on the Dutch part of the international dataset of the WageIndicator Foundation. It draws on annual data consisting of approximately 16,000 completed questionnaires in the WageIndicator Salary Survey (www.loonwijzer.nl) during the years 2006-2011. Worldwide comparison draws on the international dataset of the WageIndicator (2010-2011) and an analysis of wages of nearly 160,000 survey participants across the world.

[1] Eurostat data available at http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=une_rt_a&lang=en

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Introduction and definitions

The main purpose of this first Loonwijzer – Monsterboard Wage Index is to describe some of the key characteristics of the workforce in ten selected sectors of the Dutch labor market. We study the following sectors[2]: (i) Agriculture, nature, animals, environment, (ii) Construction, fittings, and housing, (iii) Education, research, and training, (iv) Finance, banking, and insurance, (v) Health care, paramedics, and laboratory, (vi) Hospitality, tourism, leisure, and sports, (vii) Industrial production, manufacture, and metal, (viii) IT, automation, and telecommunications, (ix) Marketing, PR, and advertising, and (x) Transport, logistics, ports, and airports. Levels as well as changes in key characteristics are studied in six focus areas: (a) gross hourly wage and bonuses, (b) gender pay gap, (c) working hours and overtime, (d) restructuring expectations and restructuring in the past 12 months, (e) satisfaction with work in detail and (f) satisfaction with life as-a-whole.

In the second chapter, we focus on developments in the two main sectors (1. Information and communication, and 2. Financial and insurance activities) in the period of years 2006 – 2011.

The report compares wages on the worldwide basis in the last chapter. It focuses on 4 occupational groups across (up to) 23 countries: 1) managers, 2) professionals, 3) technicians and associate professionals, 4) and clerical support workers.

Sector analysis of this report is based on the Dutch part of the international dataset of the WageIndicator Foundation. It draws on yearly data consisting of approximately 16,000 completed questionnaires in the WageIndicator Salary Survey (www.loonwijzer.nl) during the period of years 2010 - 2011.[3] Worldwide comparison draws on international dataset of the WageIndicator (2010-2011) and analyses wages of nearly 160,000 survey participants across world.

Below we provide details about the six main areas of concern:

1. **Gross hourly wage and bonuses –** Gross hourly wage, for our purposes, is computed from the weekly hours, the wage period and the gross wage minus the bonuses. We report median[4] of gross hourly wage. In addition, frequencies of five types of bonuses are

[2] These sectors are derived from the occupational groups with the same names
[3] For more information about structure of the Dutch sample see the Appendix of this report.
[4] A median is the numeric value separating the upper half of a sample from its lower half.

reported, i.e. holiday allowance, end-of-year bonus, 13^{th}-month pay, profit share and performance bonus.

2. **Gender pay gap** – Gender pay gap is computed according to the formula:

$$Pay\ \ gap = \frac{Median\ \ wage_{female} - Median\ \ wage_{male}}{Median\ \ wage_{male}} * 100\%$$

It can be interpreted as the percent difference between female and male median wages. It is computed for major occupational groups and based on data for the period 2010 – 2011 (without annual comparison).

3. **Working hours and overtime** – In this focus area we study the proportion of the workforce with permanent employment contracts, full-time working hours, work shifts or irregular hours, regular work on Saturdays, regular work on Sundays, regular work in the evening and ways of overtime compensation.

4. **Restructuring expectations and restructuring in the past 12 months**

   There are two types of variables that we study in this focus area.

   Restructuring in the past 12 months: This backward-looking variable is measured by the proportion of workers reporting announcements of redundancies, training opportunities, reorganization, new strategic initiatives, announcement of voluntary retirement, merger with another organization, renewal of computer equipment, or reporting a competent management strategy in their organizations in the past 12 months.

   Expectations in the next 12 months: This forward-looking variable is measured by the proportion of workers expecting in the next 12 months to stay with current employer, eager to get promoted, expecting change of work responsibilities, redundancy of post, pay rise, eager to find a new job, and expecting computer training, or unstable and uncertain income.

5. **Satisfaction with work in detail** – This variable is measured by the rate of satisfaction with job, wage, commuting time, combination of work and family life, job security, working environment, working hours, colleagues, superiors, employer's approach to pay, allowance/bonuses and kind of contract among the workforce. It is reported as the percentage of satisfied (or more precisely, satisfied or highly satisfied employees) among the respondents.

6. **Satisfaction with life as-a-whole –** This variable is measured by the rate of overall satisfaction with life. It is reported as the percentage of satisfied employees (or more precisely, satisfied or highly satisfied employees).

1. Sectoral comparison

During the period 2010 – 2011 a moderate increase in the median of gross hourly wage is observed across all the sectors except for Finance, banking and insurance where only negligible change in opposite direction was experienced. The highest percentage change is observed in Industrial production, manufacture and metal (6.8%), Marketing, PR, and advertising (6%) and Agriculture, nature, animals and environment (5.3%). Lower than 2% changes are found in Hospitality, tourism, leisure, sports and Construction, fittings, housing (see Table 1).

Remarkably, wage increases do not appear to be solely in favour of higher income groups, since the proportion of employees at risk of poverty (low pay) decreased in all studied sectors except for Construction, fittings and housing with only a slight increment. In 2011, the highest percentage of employees at risk of poverty or low pay[5] could be found in Hospitality, tourism, leisure, sports (26%). Only 3% of employees in Education, research and training could be regarded as at risk of poverty (low pay) (see Table 2).

Table 1: Median gross hourly wage

Sector	Year of the survey		% change
	2010	2011	
Agriculture, nature, animals, environment	13.3 €	14 €	5.3%
Construction, fittings, housing	14.8 €	15 €	1.4%
Education, research, training	17.6 €	18.4 €	4.5%
Finance, banking, insurance	16.9 €	16.8 €	-0.6%
Health care, paramedics, laboratory	16.4 €	17 €	3.7%
Hospitality, tourism, leisure, sports	11.3 €	11.5 €	1.8%
Industrial production, manufacture, metal	14.8 €	15.8 €	6.8%
IT, automation, telecommunication	17.3 €	17.7 €	2.3%
Marketing, PR, advertising	15.1 €	16 €	6.0%
Transport, logistics, port, airport	13.3 €	14 €	5.3%

Source: WageIndicator (2010-2011)

The most widespread employee benefit was holiday allowance, whose frequency increased in almost all sectors in 2011 except for Agriculture, nature, animals, environment in which it decreased and Finance, banking and insurance in which it stagnated. Other common benefits were end-of-year bonus and performance bonus. Although there were not very dramatic annual changes of employee benefits, differences could be found across sectors. The incidence of end-of-year bonus did not exceed 15% in any of the sectors except for Education, research, training and Health care, paramedics, laboratory where 35% of

[5] Employees at risk of poverty (low pay) are employees with basic gross hourly wage below the poverty line. Poverty line is defined for our purposes as 60% of the median gross hourly wage in the Dutch labour market. Poverty line is at the level of 9€/hour in 2010 and 9.5€/hour in 2011.

employees were given this benefit in 2011. More than 15% of employees received performance bonus in Finance, banking and insurance, IT, telecommunication, and automation, and Marketing, PR, advertising in 2011. The incidence of performance bonus didn't exceed 9% in any of the other sectors (see Figure1, Figure2 and Figure 3).

Table 2: Percentage of employees at risk of poverty (low pay)

Sector	Year of the survey	
	2010	2011
Agriculture, nature, animals, environment	20%	18%
Construction, fittings, housing	10%	12%
Education, research, training	5%	3%
Finance, banking, insurance	5%	4%
Health care, paramedics, laboratory	9%	4%
Hospitality, tourism, leisure, sports	29%	26%
Industrial production, manufacture, metal	12%	7%
IT, automation, telecommunication	7%	5%
Marketing, PR, advertising	8%	7%
Transport, logistics, port, airport	13%	12%

Source: WageIndicator (2010-2011)

Figure 1: Percentage of employees receiving holiday allowance across sectors

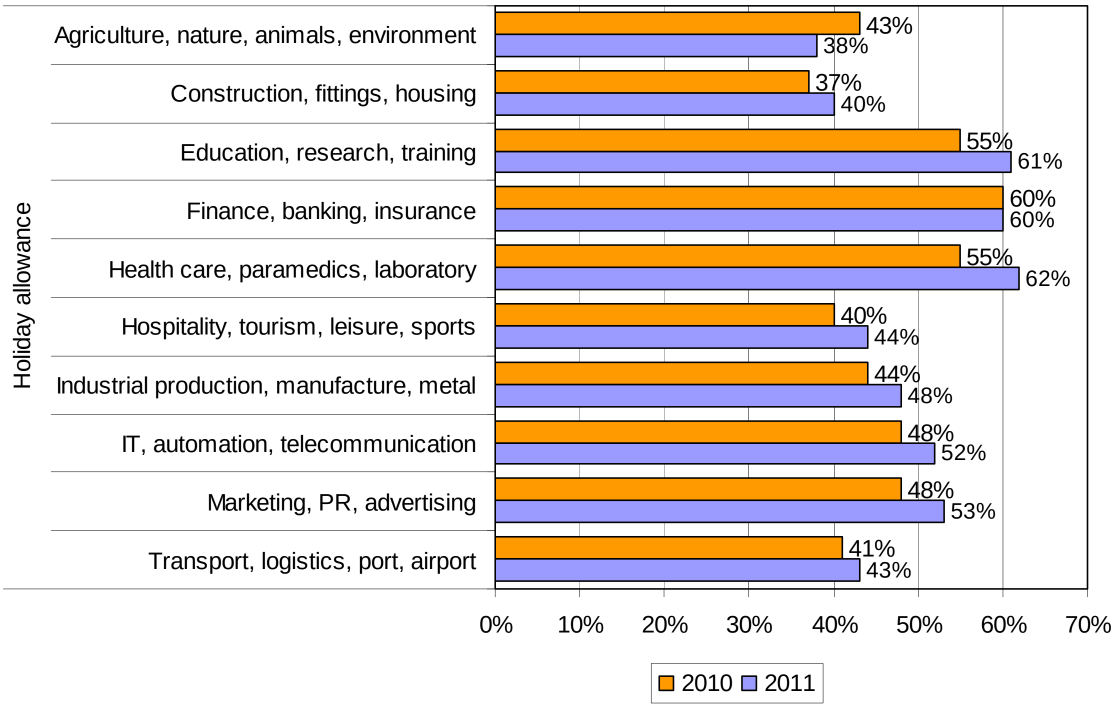


Figure 2: Percentage of employees receiving end-of year-bonus across sectors

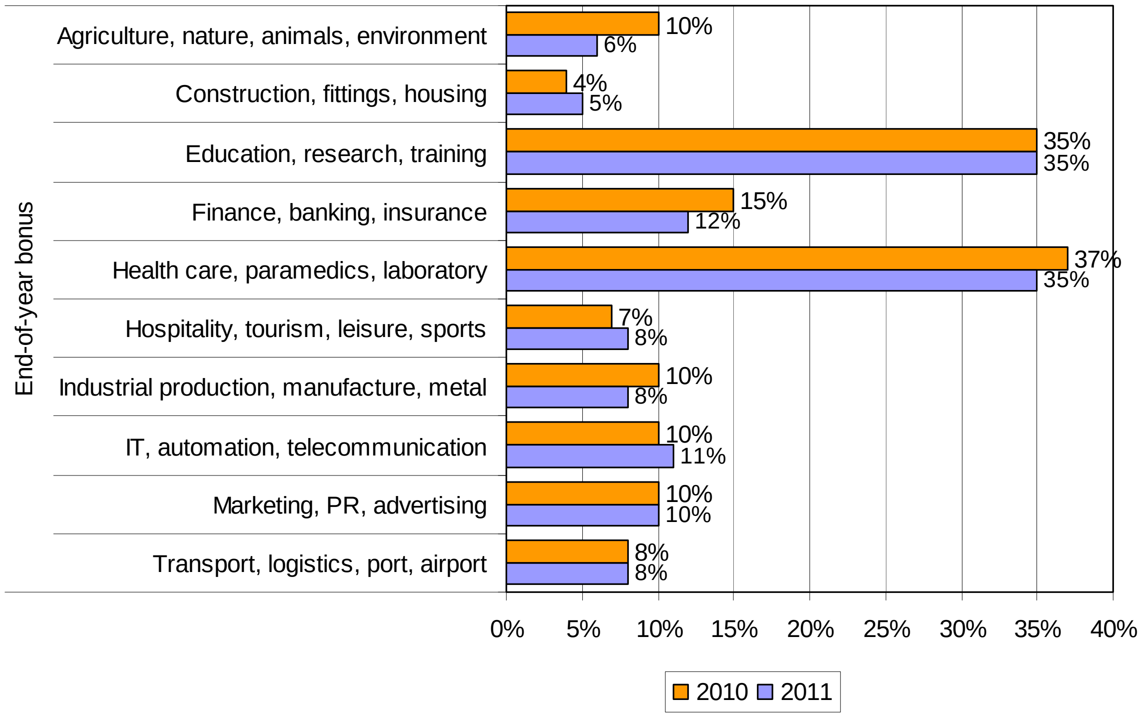
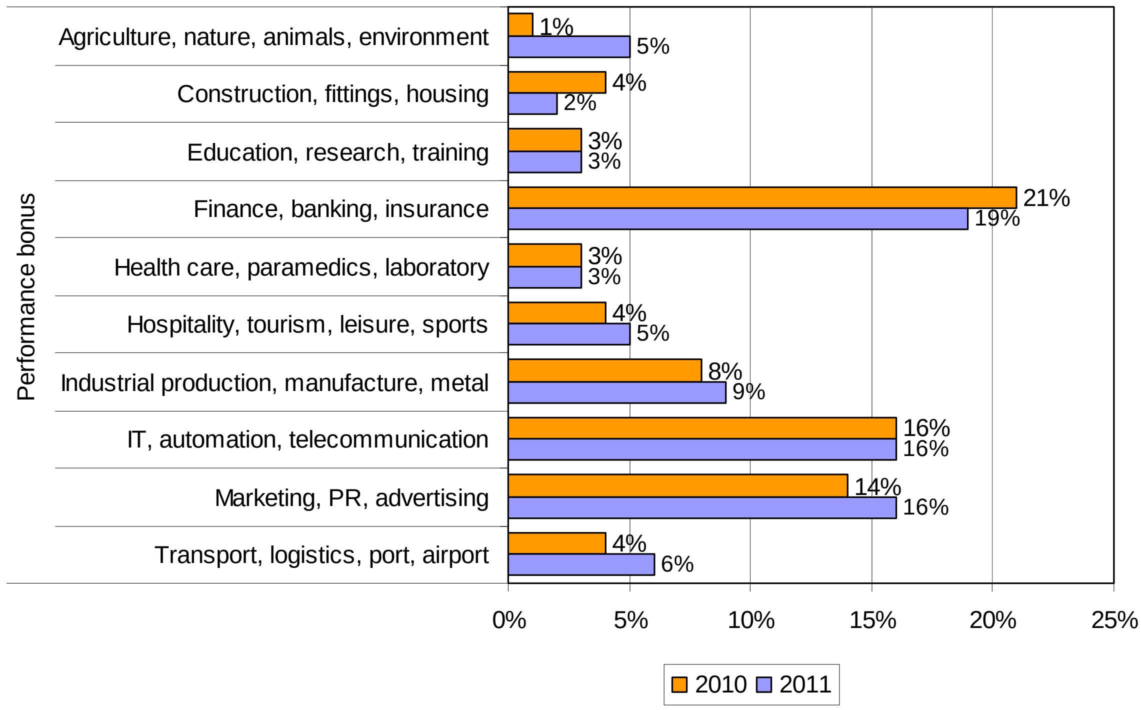


Figure 3: Percentage of employees receiving performance bonus across sectors



Satisfaction with job security can be regarded as one of the more sensitive factors reflecting changes in the labour market. In 2011, increase in the proportion of employees satisfied with job security is observed in all sectors compared to 2010. The highest percentage of employees (83%) reported satisfaction with job security in Marketing, PR and advertising. The lowest proportion of employees satisfied with job security is apparent in Agriculture, nature, animals, environment, Transport, logistic, port, airport and also in Industrial production, manufacture and metal (61%). (See Figure 4)

In this respect the mood of employees improved and they were more willing to find a new job in 2011. In 7 out of the 10 studied sectors, in 2011 a higher percentage of employees reported eagerness to find a new job in the next 12 months (see Figure 5).

Figure 4: Percentage of employees satisfied with job security across sectors

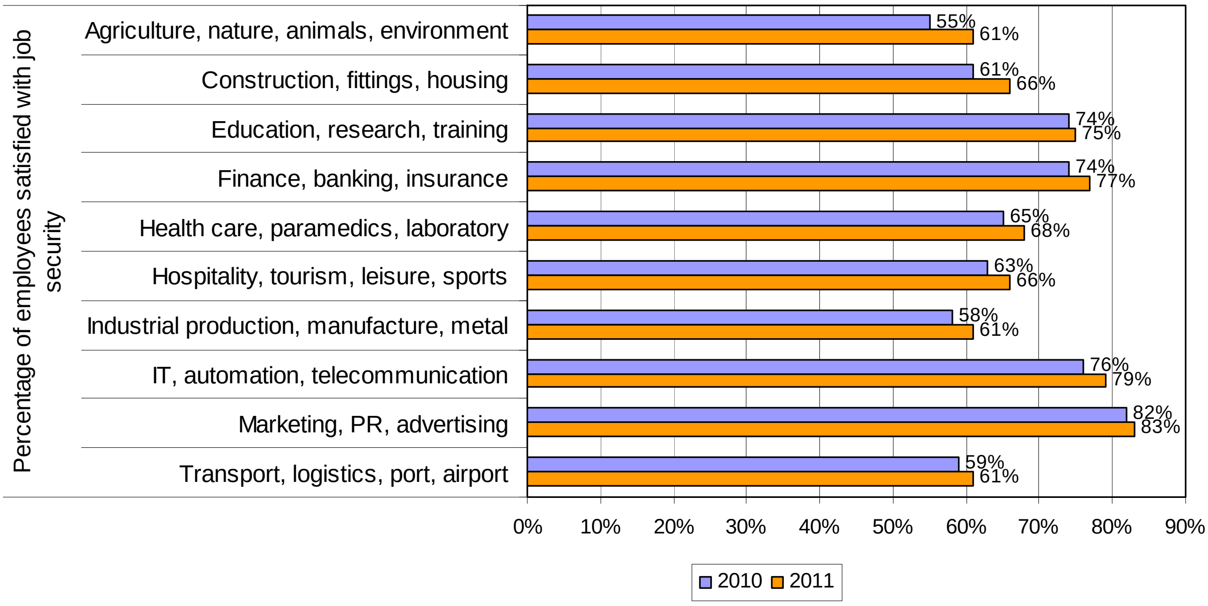
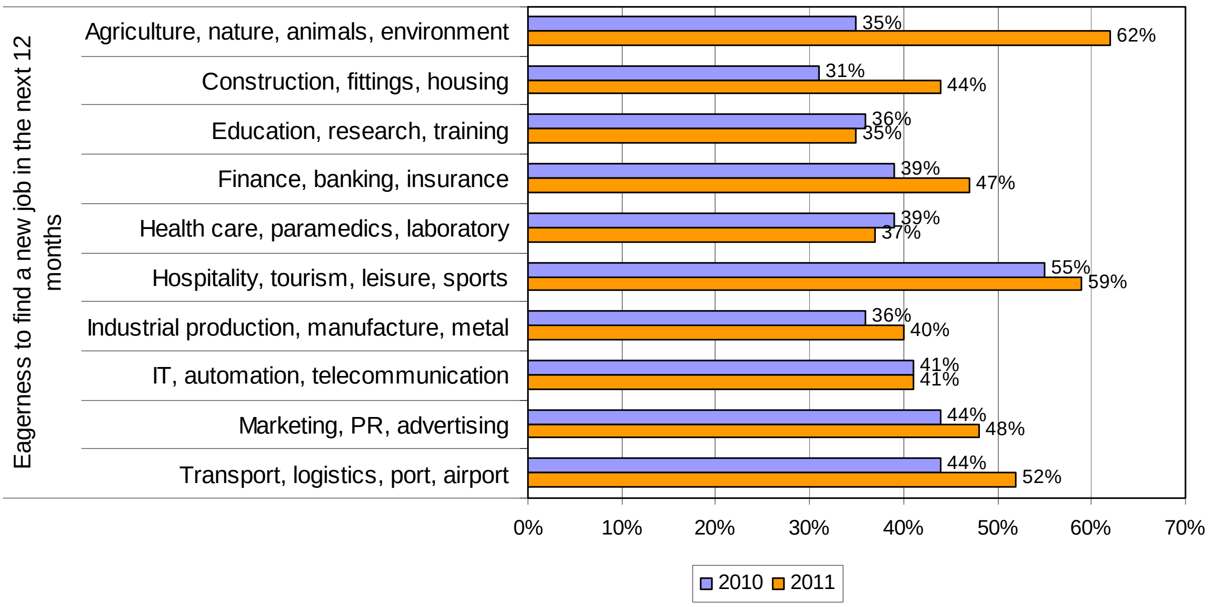


Figure 5: Percentage of employees expressing willingness to find a new job in the next 12 months across sectors



1.1 Agriculture, nature, animals, environment

Summary

In the Agriculture, nature, animals and environment sector the median gross hourly wage increased by 5.3% from 13.3€ in 2010 to 14€ in 2011. The frequency of each employee bonus decreased in 2011 as compared to 2010, except for the performance bonus. This increase in the percentage of employees given performance bonuses could possibly be understood as one of the ways to compensate the observed cuts in other regular bonuses, or as an effort to motivate retained workers in times of downsizing of the labor force. In general, the most frequent bonus is holiday allowance (see Table 3 and Figure 6).

Gender wage gap in the period 2010 – 2011 was -16%, i.e. median female wages of the skilled agricultural, fishery and forestry workers were 16% lower than median male wage (see Table 4).

Annual decrease of the frequency of permanent employment, irregular hours, regular work on Saturdays and Sundays, and negligible increase of the frequency to full-time employment is observed in 2011 as compared to 2010. The incidence of regular work in the evenings didn't change. The striking difference in compensation of overtime work between 2010 and 2011 lies in a significant increase of non-compensatory practice. Specifically, the frequency of each of the other ways of overtime compensation decreased except for overtime paid as normal hours which remained stable (see Table 5 and Figure 7).

The proportion of employees reporting announcement of redundancies and training opportunities in the past 12 months of the organization changed only slightly between 2011 and 2010. Higher decreases in frequencies are observed for items such as reorganization, new strategic initiatives, merger with another organization and renewal of computer equipment. Relatively fewer employees expected to stay with same employer, promotions and pay rise in the next 12 moths. Furthermore, a larger proportion of employees expects to find a new job in the next 12 months and more employees expect unstable and uncertain income (see Table 6 and Figure 8).

Regarding our measures of satisfaction, it can be concluded that relatively fewer employees were satisfied with their kind of the contract and employer's approach to pay. Percentage of

employees satisfied with life changed negligibly in negative direction (see Table 7 and Table 8).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 3: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	13.3 €	14 €
Annual % change		5.3%

Figure 6: Overview of bonuses given to employees; percentage of employees

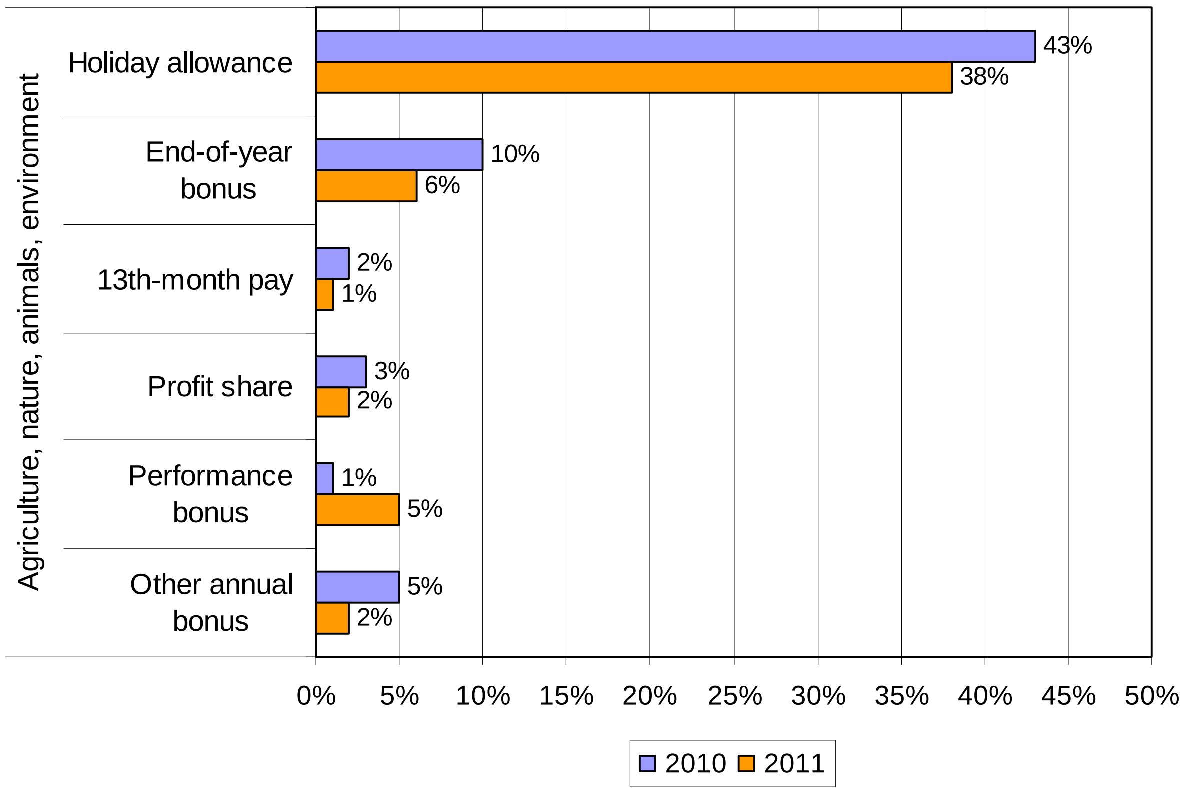


Table 4: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Skilled agricultural, fishery and forestry workers	13.5	11.4	-16%

Note: Reported only for occupational groups with at least 100 observations

Table 5: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	81%	74%	-9%
Full-time working hours	80%	82%	2%
Work shifts or irregular hours	41%	36%	-12%
Regular work on Saturdays	49%	48%	-2%
Regular work on Sundays	23%	19%	-17%
Regular work in the evenings	37%	37%	0%

Figure 7: Overview of overtime compensation; percentage of employees

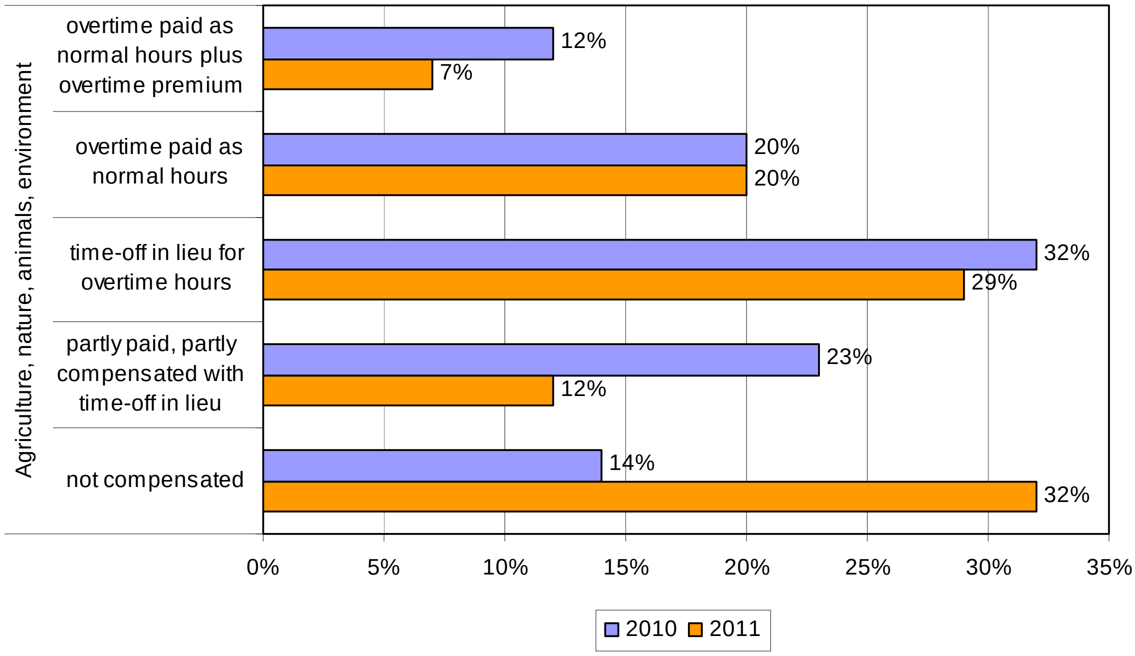


Table 6: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	20%	22%	10%
Training opportunities	42%	43%	2%
Reorganisation	15%	7%	-53%
New strategic initiatives	44%	35%	-20%
Announcement of voluntary retirement	8%	5%	-38%
Merger with another organisation	24%	16%	-33%
Renewal of computer equipment	50%	41%	-18%
Competent management strategy	44%	39%	-11%

Figure 8: Percentage of employees expecting various scenarios in the next 12 months

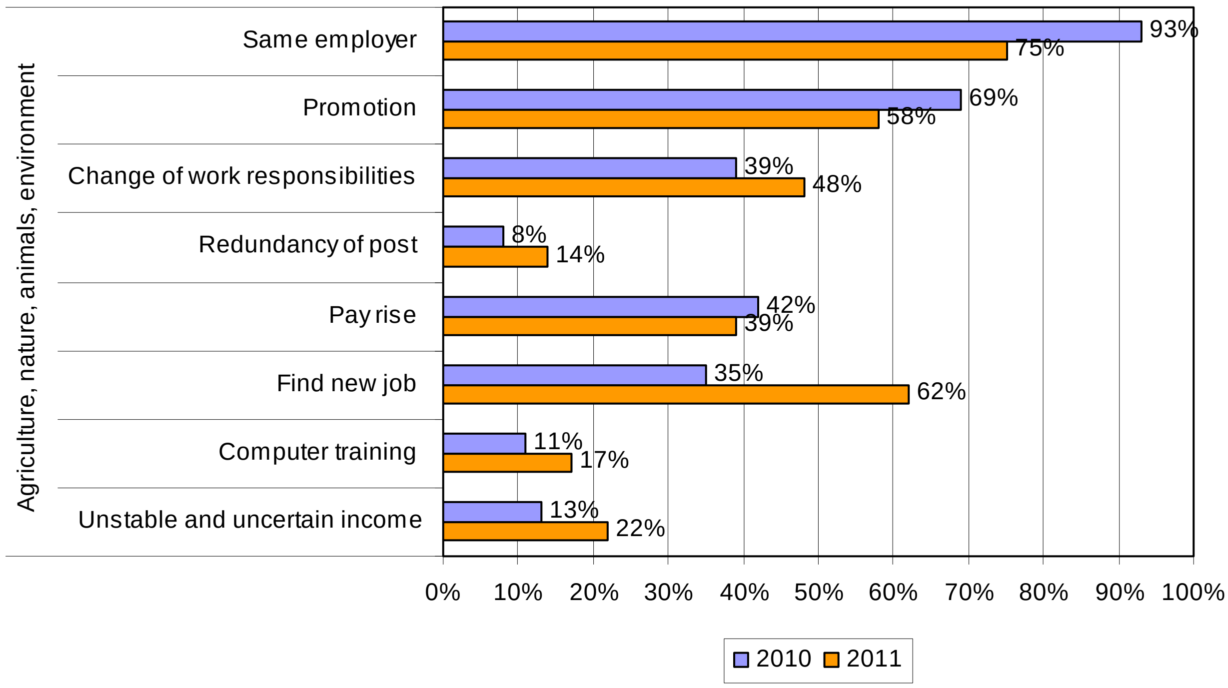


Table 7: Percentage of employees satisfied with various aspects of work

Sector	Year of the survey 2010	2011	% change
Job	66%	63%	-5%
Wage	21%	20%	-5%
Commuting time	66%	71%	8%
Combination of work and family life	59%	61%	3%
Job security	55%	61%	11%
Working environment	61%	67%	10%
Working hours	60%	61%	2%
Colleagues	73%	74%	1%
Superiors	61%	65%	7%
Employer's approach to pay	37%	25%	-32%
Allowances/bonuses	30%	30%	0%
Kind of contract	54%	29%	-46%

Table 8: Percentage of employees satisfied with life

	Year of the survey 2010	2011
% of respondents	90%	89%
Annual % change		-1%

1.2 Construction, fittings, housing

Summary

The median gross hourly wage in the Construction, fittings and housing sector increased by 1.4% from 14.8€ in 2010 to 15€ in 2011. The percentage of employees receiving holiday allowance, as one of the most common bonuses, increased by 3 percentage points to 40% in comparison to 1Q2010. The other bonuses changed only slightly or remained stable (see Table 9 and Figure 9).

In terms of median gross hourly wage in this sector, in the period 2010 – 2011 female technicians and associate professional earned 10% less then their male colleagues. The corresponding figure for clerical support workers was -5% (see Table 10).

Annual decrease in the frequency of permanent employees, full-time employees and work in the irregular hours was observed. On the other hand, the incidence of regular work on Saturdays and regular work in the evenings increased. At the expense of partly paid overtime, an increase of overtime paid as normal hours is observed (see Table 11 and Figure 10).

In 2011, significantly fewer employees reported announcements of redundancies or voluntary retirement, merger with another organization, competent management strategy and training opportunities. More employees expected promotions, change of work responsibilities and pay rise. Fewer employees expected to stay with the same employer and more of them expected to find a new job (see Table 12 and Figure 11).

Regarding satisfaction with various aspects of work in 2011, the highest increase of the proportion of satisfied employees is observed for job security and working environment. More employees were not satisfied with their kind of contract in 2011 compared to the previous year. All the other changes are rather small. The percentage of employees satisfied with life as-a-whole decreased a little (see Table 13 and Table 14).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 9: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	14.8 €	15 €
Annual % Change		1.4%

Figure 9: Overview of bonuses given to employees; percentage of employees

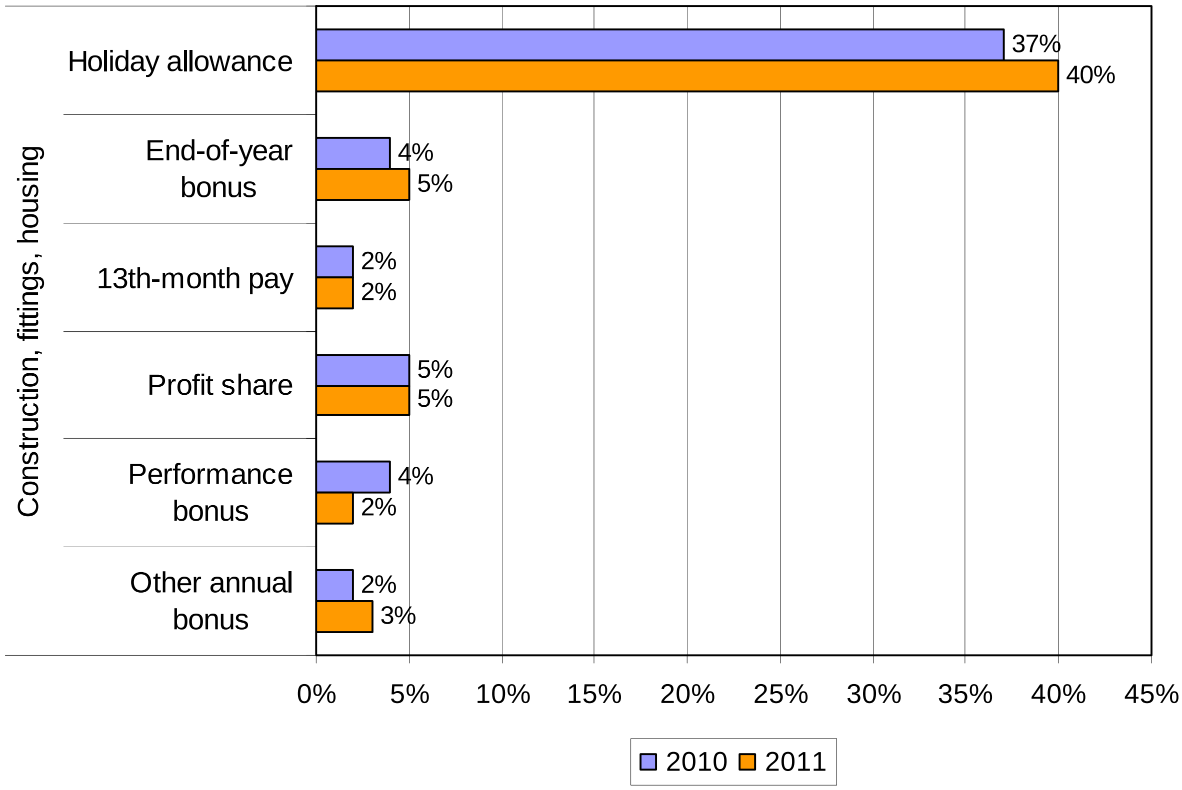


Table 10: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Technicians and associate professionals	17.7	15.8	-10%
Clerical support workers	16.9	16.1	-5%

Note: Reported only for occupational groups with at least 100 observations

Table 11: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	79%	75%	-5%
Full-time working hours	95%	92%	-3%
Work shifts or irregular hours	34%	32%	-6%
Regular work on Saturdays	18%	21%	17%
Regular work on Sundays	6%	6%	0%
Regular work in the evenings	25%	27%	8%

Figure 10: Overview of overtime compensation; percentage of employees

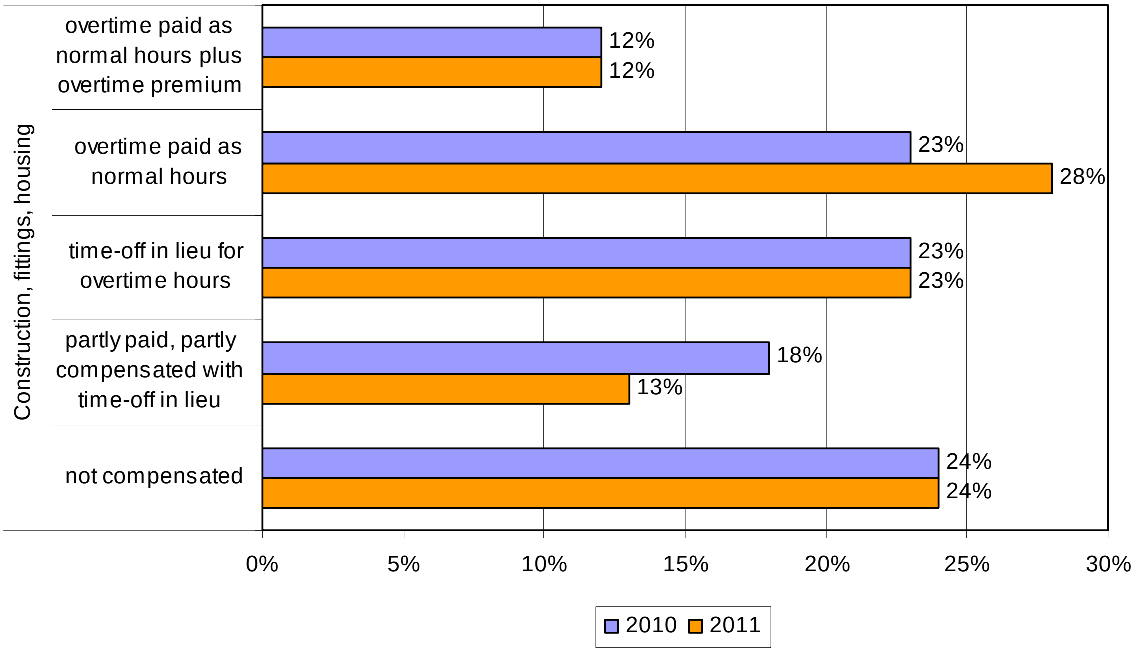


Table 12: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	36%	27%	-25%
Training opportunities	45%	37%	-18%
Reorganisation	13%	9%	-31%
New strategic initiatives	46%	42%	-9%
Announcement of voluntary retirement	9%	3%	-67%
Merger with another organisation	17%	10%	-41%
Renewal of computer equipment	34%	39%	15%
Competent management strategy	40%	34%	-15%

Figure 11: Percentage of employees expecting various scenarios in the next 12 months

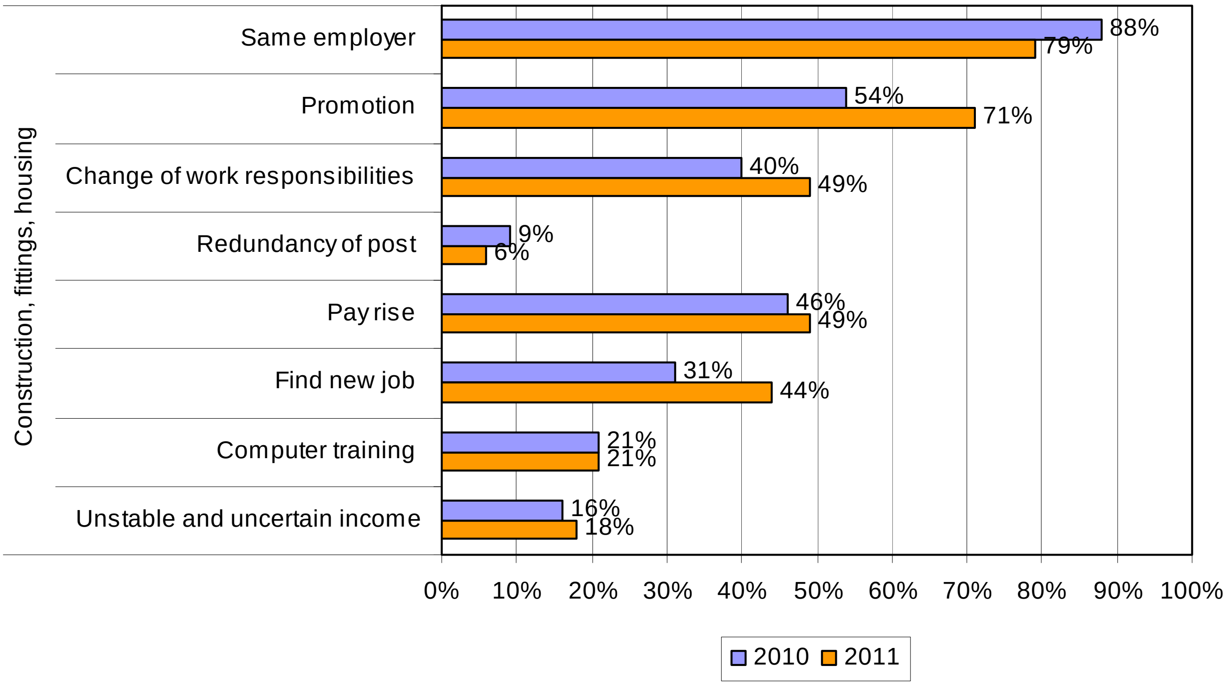


Table 13: Percentage of employees satisfied with various aspects of work

	Year of the survey		
Sector	2010	2011	% change
Job	65%	64%	-2%
Wage	21%	21%	0%
Commuting time	54%	56%	4%
Combination of work and family life	59%	58%	-2%
Job security	61%	66%	8%
Working environment	60%	65%	8%
Working hours	60%	63%	3%
Colleagues	73%	74%	1%
Superiors	58%	60%	3%
Employer's approach to pay	27%	28%	4%
Allowances/bonuses	19%	20%	5%
Kind of contract	49%	41%	-16%

Table 14: Percentage of employees satisfied with life

	Year of the survey	
	2010	2011
% of respondents	93%	91%
Annual % change		-2%

1.3 Education, research, training

Summary

In the Education, research and training sector the median gross hourly wage increased by 4.5% from 17.6€ in 2010 to 18.4€ in 2011. The incidence of holiday allowance bonus increased. The other bonuses changed only slightly or remained stable (see Table 15 and Figure 12).

In terms of median gross hourly wage, in the period 2010 – 2011 in this sector female professionals earned 12% less than their male colleagues (see Table 16).

The relative frequency of permanent employment contracts as well as full-time contracts decreased in 2011. On the other hand, the incidence of all types of working hours outside the normal daytime hours on weekdays increased except for regular work on Saturdays. The incidence of various overtime compensation types changed at most by 3 percentage points (see Table 17 and Figure 13).

In 2011, there was a significant increase in the proportion of employees reporting announcement of redundancies, reorganization or new strategic initiatives in the past 12 months. Over the same period relatively fewer employees reported announcement of voluntary retirement and merger with another organization. Based on annual comparison of employees' expectations, we can conclude that there were moderate changes for the majority of studied expectations in 2011. The highest positive percentage point increase is observed in the proportion of employees expecting change of work responsibilities. Over the same period relatively fewer employees expect pay rise (see Table 18 and Figure 14).

Interestingly, regarding employees' satisfaction, there were relatively more employees satisfied with allowances/bonuses and employers' approach to pay in 2011 compared to the previous year. A lower percentage of employees reported satisfaction with their kind of contract, working environment and working hours. Two percentage decrease is observed in the proportion of employees satisfied with life as-a-whole (see Table 19 and Table 20).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 15: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	17.6 €	18.4 €
Annual % Change		4.5%

Figure 12: Overview of bonuses given to employees; percentage of employees

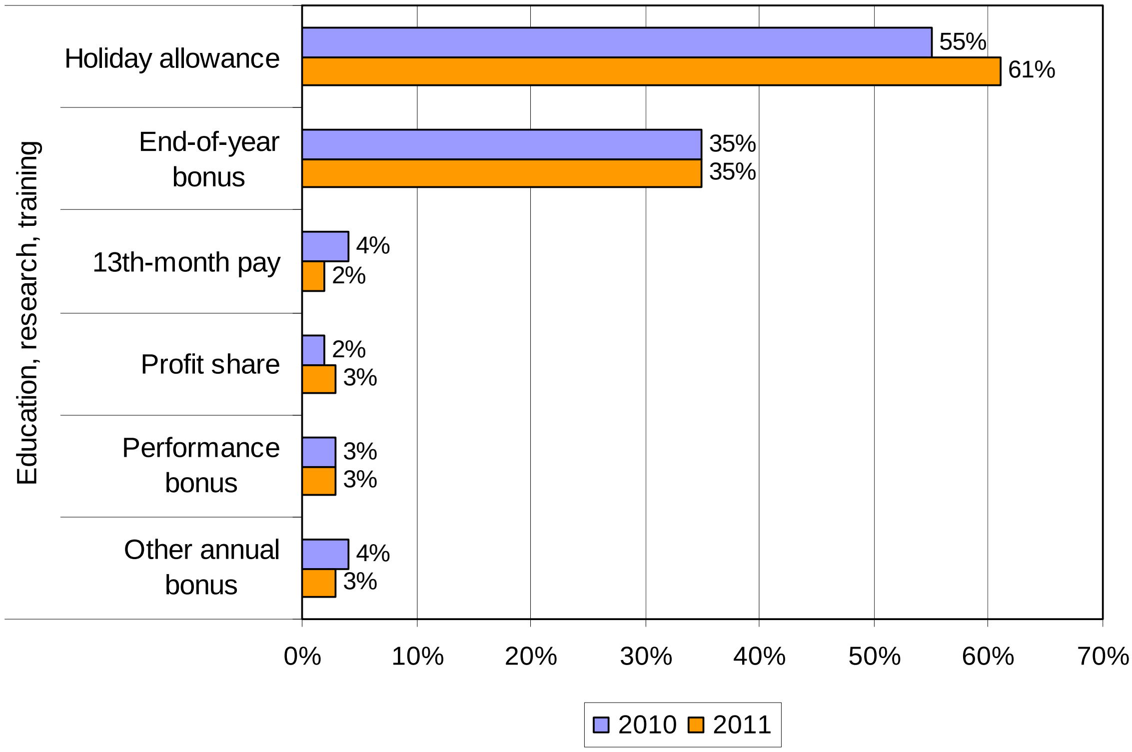


Table 16: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	20.4	18	-12%

Note: Reported only for occupational groups with at least 100 observations

Table 17: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	76%	71%	-7%
Full-time working hours	63%	61%	-3%
Work shifts or irregular hours	46%	50%	9%
Regular work on Saturdays	24%	23%	-4%
Regular work on Sundays	17%	19%	12%
Regular work in the evenings	47%	51%	9%

Figure 13: Overview of overtime compensation; percentage of employees

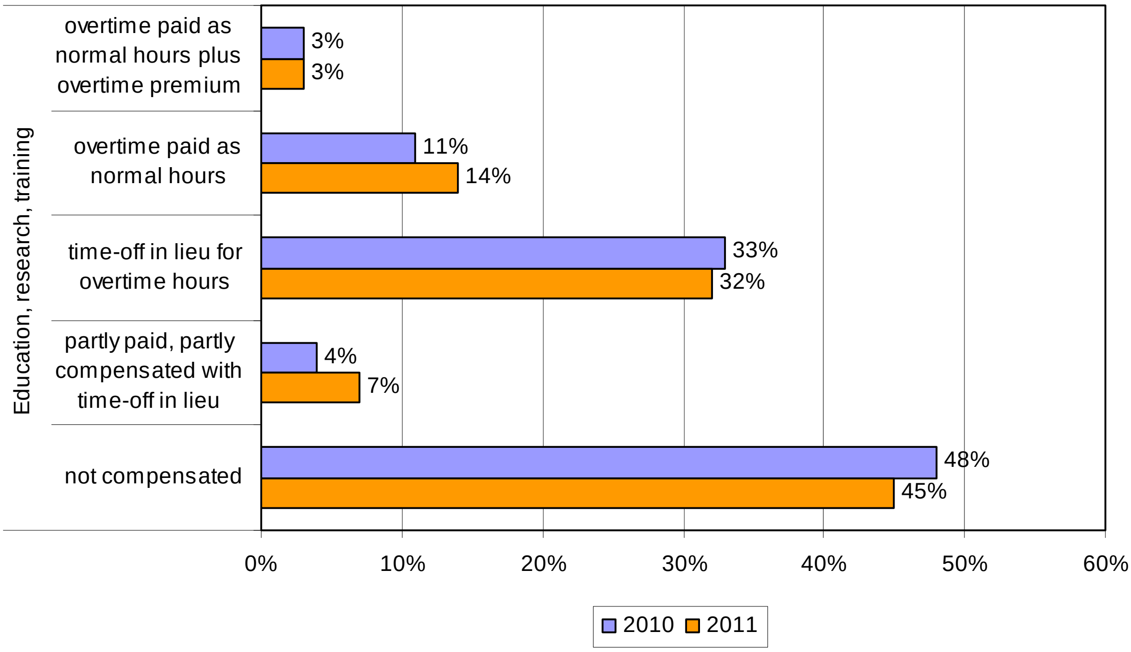


Table 18: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	22%	40%	82%
Training opportunities	61%	62%	2%
Reorganisation	13%	22%	69%
New strategic initiatives	48%	60%	25%
Announcement of voluntary retirement	9%	6%	-33%
Merger with another organisation	17%	15%	-12%
Renewal of computer equipment	30%	32%	7%
Competent management strategy	35%	35%	0%

Figure 14: Percentage of employees expecting various scenarios in the next 12 months

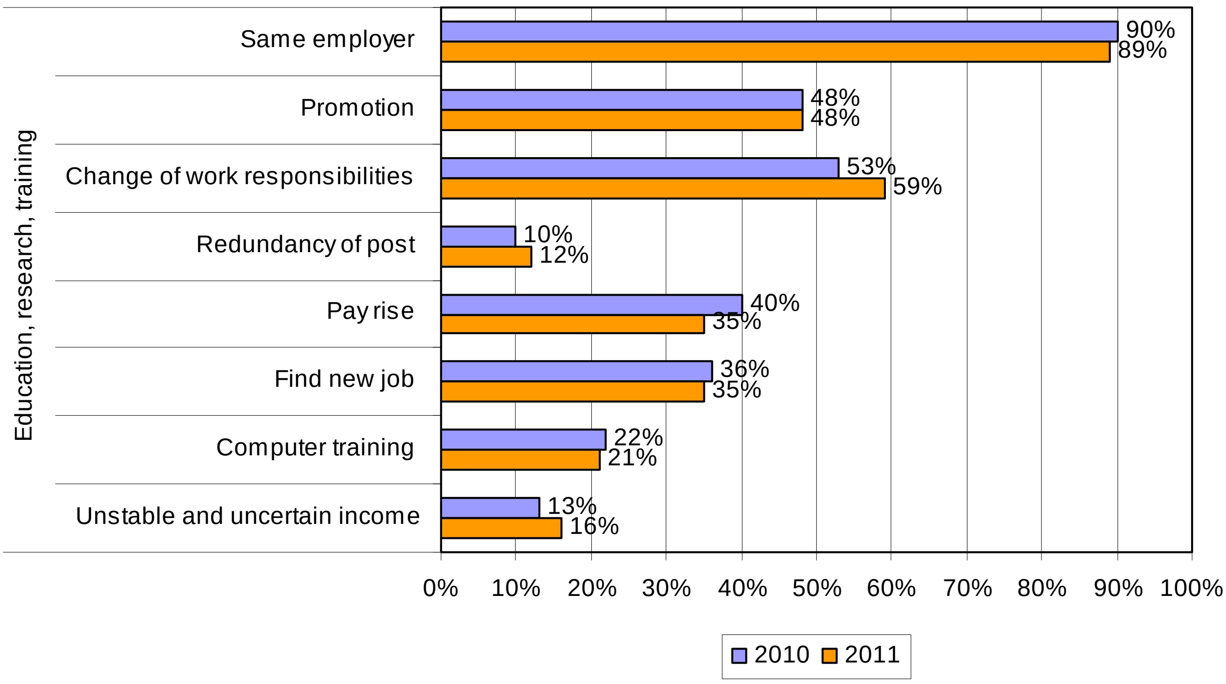


Table 19: Percentage of employees satisfied with various aspects of work

	Year of the survey		
Sector	2010	2011	% change
Job	65%	69%	6%
Wage	31%	33%	6%
Commuting time	62%	68%	10%
Combination of work and family life	59%	61%	3%
Job security	74%	75%	1%
Working environment	67%	59%	-12%
Working hours	62%	57%	-8%
Colleagues	77%	77%	0%
Superiors	60%	63%	5%
Employer's approach to pay	37%	47%	27%
Allowances/bonuses	37%	44%	19%
Kind of contract	51%	47%	-8%

Table 20: Percentage of employees satisfied with life

	Year of the survey	
	2010	2011
% of respondents	94%	92%
Annual % change		-2%

1.4 Finance, banking, insurance

Summary

In the Finance, banking and insurance sector the median gross hourly wage remained relatively stable in 2011. In comparison to 2010 it decreased by 0.6% from 16.9€ to 16.8€. The percentage of employees receiving bonuses decreased slightly except for holiday allowance and 13th-month pay which remained stable (see Table 21 and Figure 15).

In terms of median gross hourly wage, in the period 2010 – 2011 female managers were earning 18% less than their male colleagues in the financial sector, 17% less when working as professionals, 18% less when working as technicians and 5% less when working as clerical support workers (see Table 22).

If we focus on employment contracts, working hours and overtime compensation, there are generally only small changes observed in this sector, which do not exceed 1 percentage point in the majority of studied items (see Table 23 and Figure 16).

Results of the year-on-year comparison imply significantly increased proportion of employees reporting announcement of redundancies, new strategic initiatives and renewal of computer equipment in the past 12 moths. Relatively more employees also expected to find a new job in the next 12 months (see Table 24 and Figure 17).

Based on the annual comparison of employees' satisfaction, we can conclude that significantly higher percentage of employees felt satisfaction with their kind of contract in 2011. The proportion of employees satisfied with their wage, allowances/bonuses and employer's approach to pay changed only slightly. Percentage of employees satisfied with life as-a-whole remained stable in 2011 (see Table 25 and Table 26).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 21: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	16.9 €	16.8 €
Annual % Change		-0.6%

Figure 15: Overview of bonuses given to employees; percentage of employees

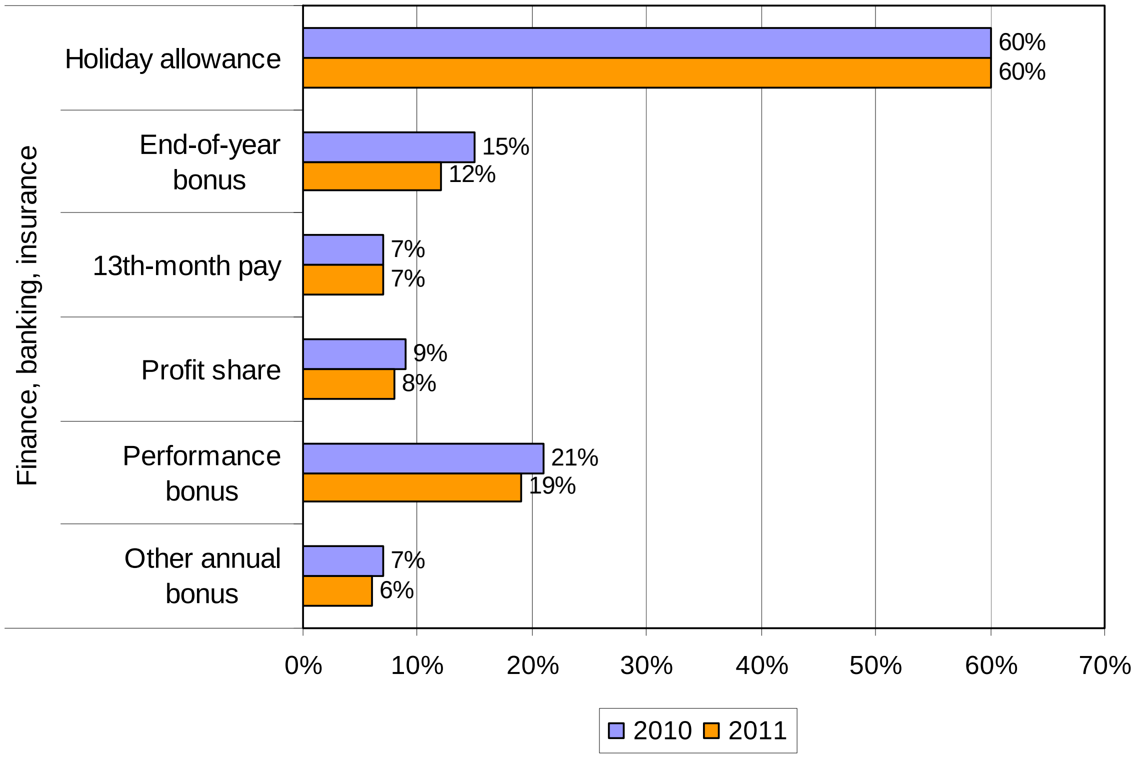


Table 22: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Managers	26.3	21.7	-18%
Professionals	24.1	20.1	-17%
Technicians and associate professionals	19.5	16	-18%
Clerical support workers	15.9	15	-5%

Note: Reported only for occupational groups with at least 100 observations

Table 23: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	81%	80%	-1%
Full-time working hours	72%	72%	0%
Work shifts or irregular hours	30%	32%	7%
Regular work on Saturdays	12%	12%	0%
Regular work on Sundays	5%	6%	20%
Regular work in the evenings	36%	36%	0%

Figure 16: Overview of overtime compensation; percentage of employees

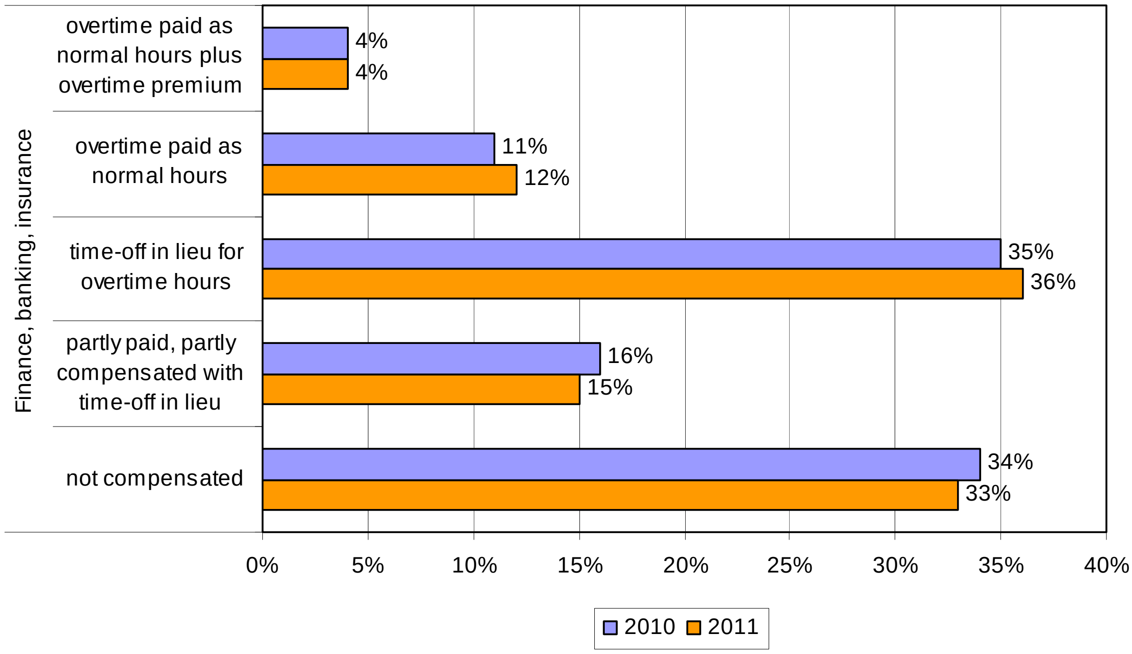


Table 24: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	39%	45%	15%
Training opportunities	62%	65%	5%
Reorganisation	25%	22%	-12%
New strategic initiatives	53%	61%	15%
Announcement of voluntary retirement	9%	6%	-33%
Merger with another organisation	24%	20%	-17%
Renewal of computer equipment	29%	39%	34%
Competent management strategy	41%	44%	7%

Figure 17: Percentage of employees expecting various scenarios in the next 12 months

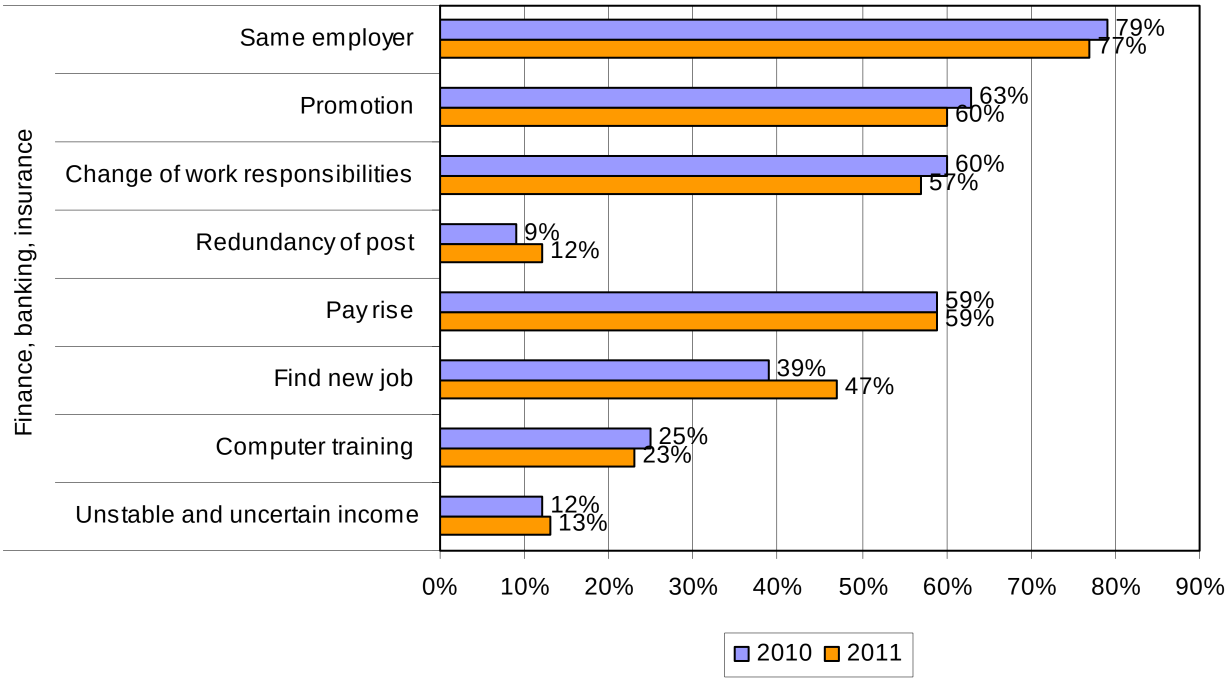


Table 25: Percentage of employees satisfied with various aspects of work

Sector	Year of the survey 2010	2011	% change
Job	58%	59%	2%
Wage	36%	35%	-3%
Commuting time	59%	62%	5%
Combination of work and family life	57%	62%	9%
Job security	74%	77%	4%
Working environment	63%	64%	2%
Working hours	62%	66%	6%
Colleagues	71%	71%	0%
Superiors	59%	59%	0%
Employer's approach to pay	40%	41%	2%
Allowances/bonuses	37%	35%	-5%
Kind of contract	50%	56%	12%

Table 26: Percentage of employees satisfied with life

	Year of the survey 2010	2011
% of respondents	93%	93%
Annual % change		0%

1.5 Health care, paramedics, laboratory

Summary

In the Health, paramedics and laboratory sector the median gross hourly wage rose by 3.7% in 2011 in comparison to 2010, from 16.4€ to 17€. The incidence of holiday allowance as one of the most common bonuses in this sector increased to 62% in 2011. All the other bonuses decreased slightly or remained stable (see Table 27 and Figure 18).

In terms of median gross hourly wage, in the period 2010 – 2011 women working as professionals earned 8% less than their male colleagues in the health sector. The corresponding figure for technicians was -11% (see Table 28).

The proportion of employees with permanent or fulltime working contract remained relatively stable in 2011. Higher values of negative percentage changes are observed for work shifts/irregular hours and regular work on Saturdays, Sundays and in the evening. The incidence of overtime paid as normal hours increased. Decrease in non-compensatory and partial compensatory practice is observed (see Table 29 and Figure 19).

In 2011, in comparison to 2010, the highest positive percentage change was observed in the proportion of employees reporting competent management strategy. All the other reported items of the organizations' past changed only negligibly in positive or negative direction. Slightly changed or stable expectations for the next 12 months are observed in 2011 compared to 2010; except for decreased percentage of employees predicting change of work responsibilities (see Table 30 and Figure 20).

More employees were satisfied with all of the reported aspects of work except relatively stable satisfaction with commuting time, work/family combination, working hours and allowances/bonuses. The proportion of employees satisfied with life as-a-whole did not change in 2011 (see Table 31 and Table 32).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 27: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	16.4 €	17 €
Annual % Change		3.7%

Figure 18: Overview of bonuses given to employees; percentage of employees

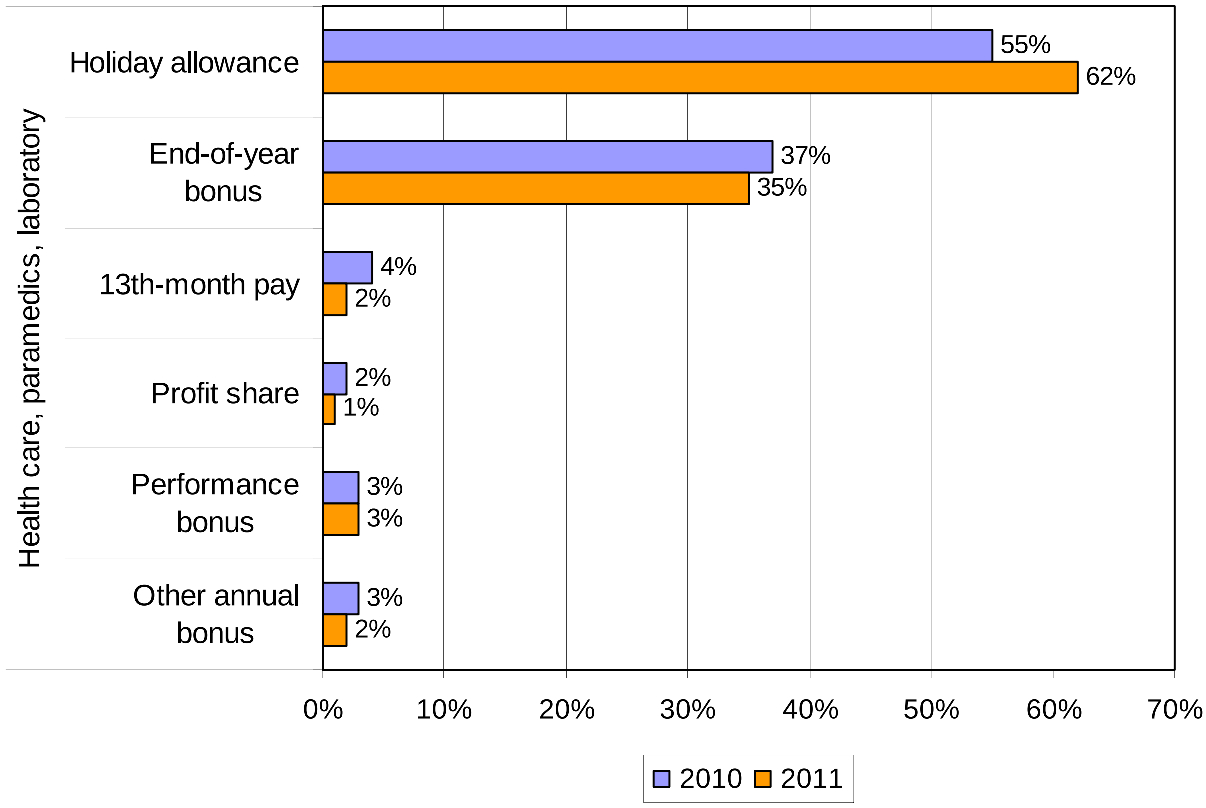


Table 28: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	20	18.3	-8%
Technicians and associate professionals	17.5	15.6	-11%

Note: Reported only for occupational groups with at least 100 observations

Table 29: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	79%	78%	-1%
Full-time working hours	45%	45%	0%
Work shifts or irregular hours	76%	74%	-3%
Regular work on Saturdays	57%	50%	-12%
Regular work on Sundays	53%	44%	-17%
Regular work in the evenings	55%	51%	-7%

Figure 19: Overview of overtime compensation; percentage of employees

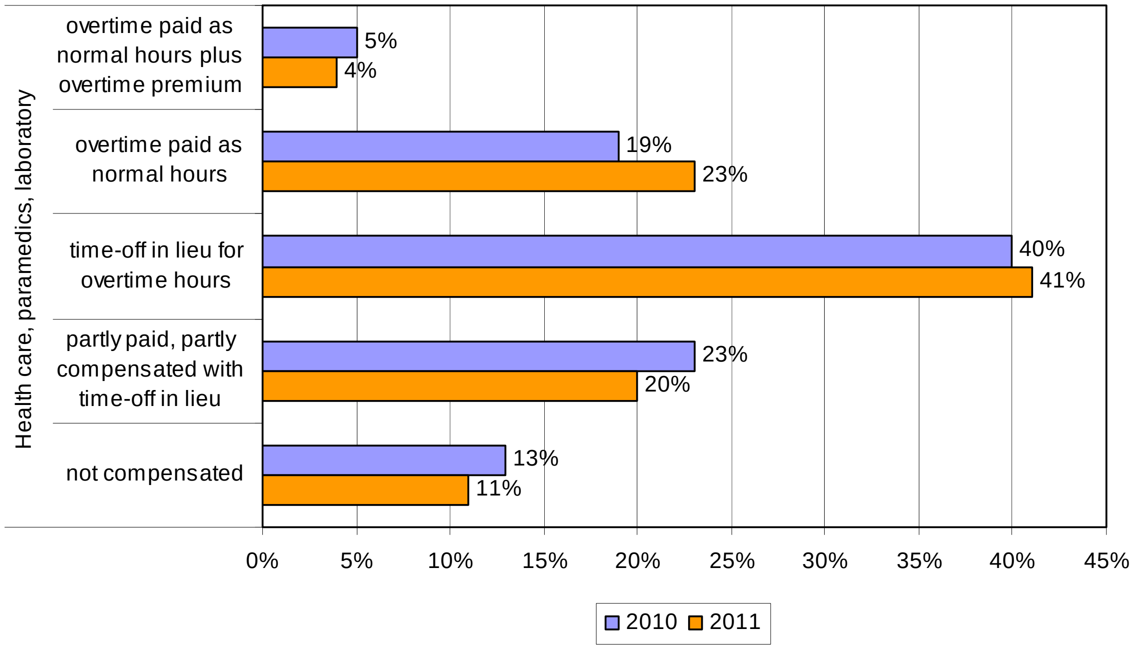


Table 30: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	25%	27%	8%
Training opportunities	60%	61%	2%
Reorganisation	17%	18%	6%
New strategic initiatives	50%	49%	-2%
Announcement of voluntary retirement	9%	6%	-33%
Merger with another organisation	24%	22%	-8%
Renewal of computer equipment	29%	32%	10%
Competent management strategy	40%	35%	-13%

Figure 20: Percentage of employees expecting various scenarios in the next 12 months

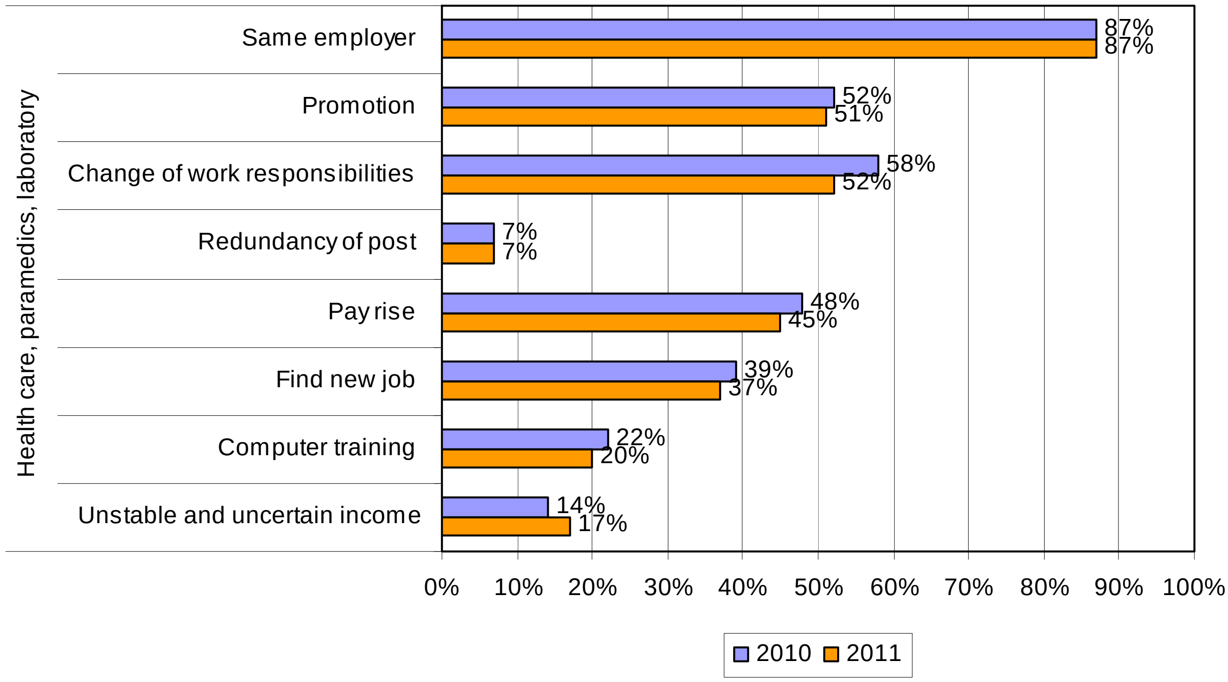


Table 31: Percentage of employees satisfied with various aspects of work

	Year of the survey		
Sector	2010	2011	% change
Job	68%	70%	3%
Wage	29%	30%	3%
Commuting time	66%	66%	0%
Combination of work and family life	63%	62%	-2%
Job security	65%	68%	5%
Working environment	64%	68%	6%
Working hours	64%	64%	0%
Colleagues	75%	80%	7%
Superiors	61%	65%	7%
Employer's approach to pay	38%	41%	8%
Allowances/bonuses	32%	32%	0%
Kind of contract	55%	59%	7%

Table 32: Percentage of employees satisfied with life

	Year of the survey	
	2010	2011
% of respondents	94%	94%
Annual % change		0%

1.6 Hospitality, tourism, leisure, sports

Summary

In the Hospitality, tourism, leisure and sport sector the median gross hourly wage increased by 1.8% from 11.3 in 2010 to 11.5€ in 2011. Holiday allowance was the most common bonus in this sector in 2010 as well as in 2011 (44%). The frequency of all the other bonuses changed only slightly or remained stable and none of them reached 10% (see Table 33 and Figure 21).

In terms of the median gross hourly wage, in the period 2010 – 2011 women working as technicians were earning 17% less than their male colleagues, and 2% less when working as clerical support workers. The positive gender pay gap meaning that women earned more than men is reported for managers (6%) and, service and sales workers (2%). This may be an artifact of different types of jobs occupied by women and men in this sector (see Table 34).

An annual decrease in the frequency of permanent and fulltime employment is observed in 2011. A negative percentage change is also observed for the incidence of regular work on Sundays and regular work in the evenings. Overtime compensation shifted towards non-compensatory practice in 2011, as compared to 2010 (see Table 35 and Figure 22).

In 2011, in comparison to 2010, a significant decrease is observed in the frequency of training opportunities, renewal of computer equipment, and merger with another organization in the past 12 months in the organization. Also, a higher percentage of employees reported competent management strategy and reorganization in the organizations' past 12 months in the 2011 survey. A lower percentage of employees expected to work for the same employer, promotion, redundancy of posts, or pay rise. In the 2011 survey, more employees expressed eagerness to find a new job in the next 12 months (see Table 36 and Figure 23).

If we focus on year-on-year comparison of satisfaction, we find that there were significantly fewer employees satisfied with their kind of contract and colleagues in 2011. Other frequencies changed by at most 3 percentage points. A negligible decrease is observed for the proportion of employees satisfied with life as a whole (see Table 37 and Table 38).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 33: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	11.3 €	11.5 €
Annual % Change		1.8%

Figure 21: Overview of bonuses given to employees; percentage of employees

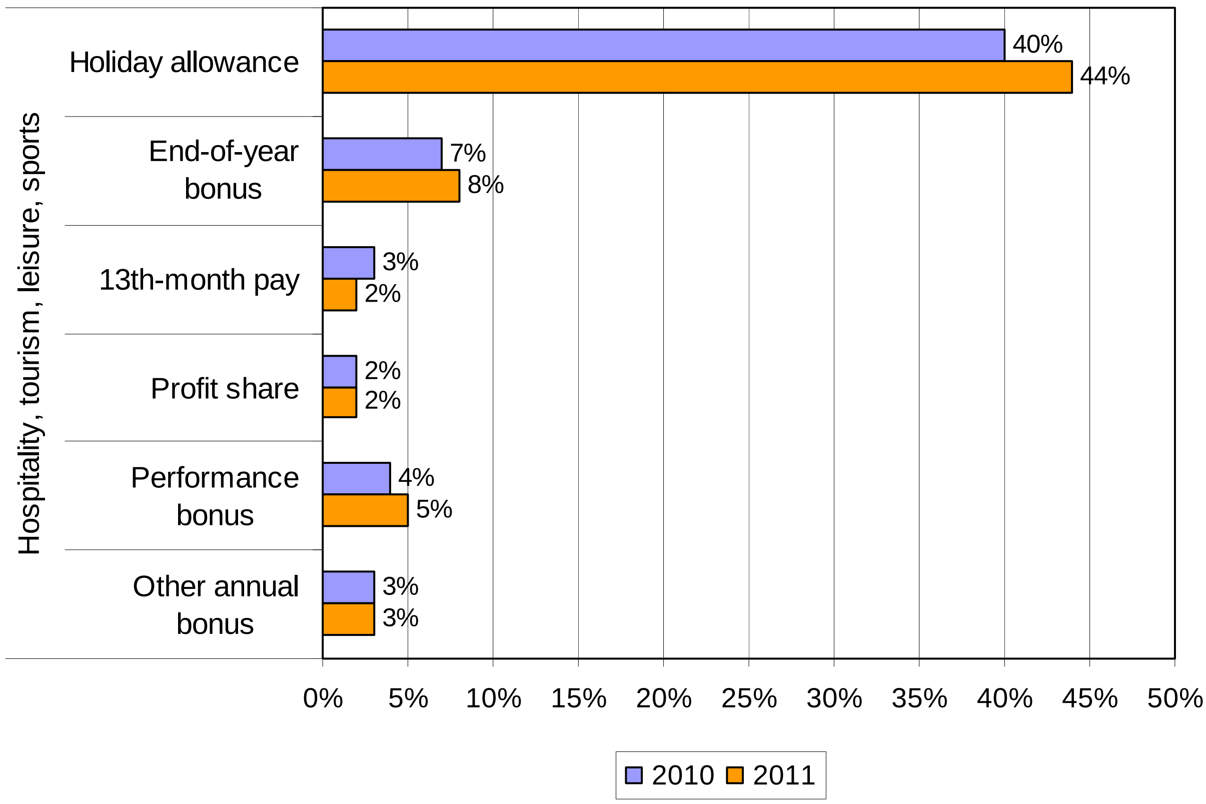


Table 34: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Managers	13.6	14.4	6%
Technicians and associate professionals	13.7	11.4	-17%
Clerical support workers	11.2	10.9	-3%
Service and sales workers	10.7	10.9	2%

Note: Reported only for occupational groups with at least 100 observations

Table 35: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	59%	57%	-3%
Full-time working hours	67%	62%	-7%
Work shifts or irregular hours	81%	84%	4%
Regular work on Saturdays	77%	79%	3%
Regular work on Sundays	69%	68%	-1%
Regular work in the evenings	76%	74%	-3%

Figure 22: Overview of overtime compensation; percentage of employees

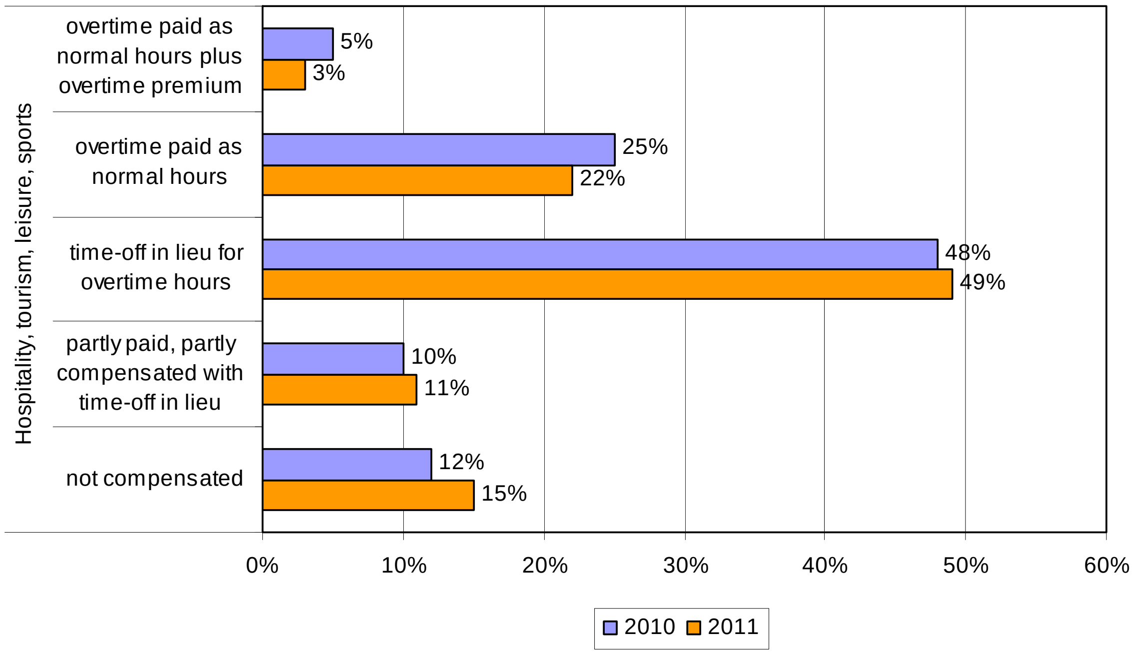


Table 36: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	31%	30%	-3%
Training opportunities	37%	25%	-32%
Reorganisation	10%	14%	40%
New strategic initiatives	40%	38%	-5%
Announcement of voluntary retirement	3%	2%	-33%
Merger with another organisation	12%	7%	-42%
Renewal of computer equipment	21%	16%	-24%
Competent management strategy	27%	34%	26%

Figure 23: Percentage of employees expecting various scenarios in the next 12 months

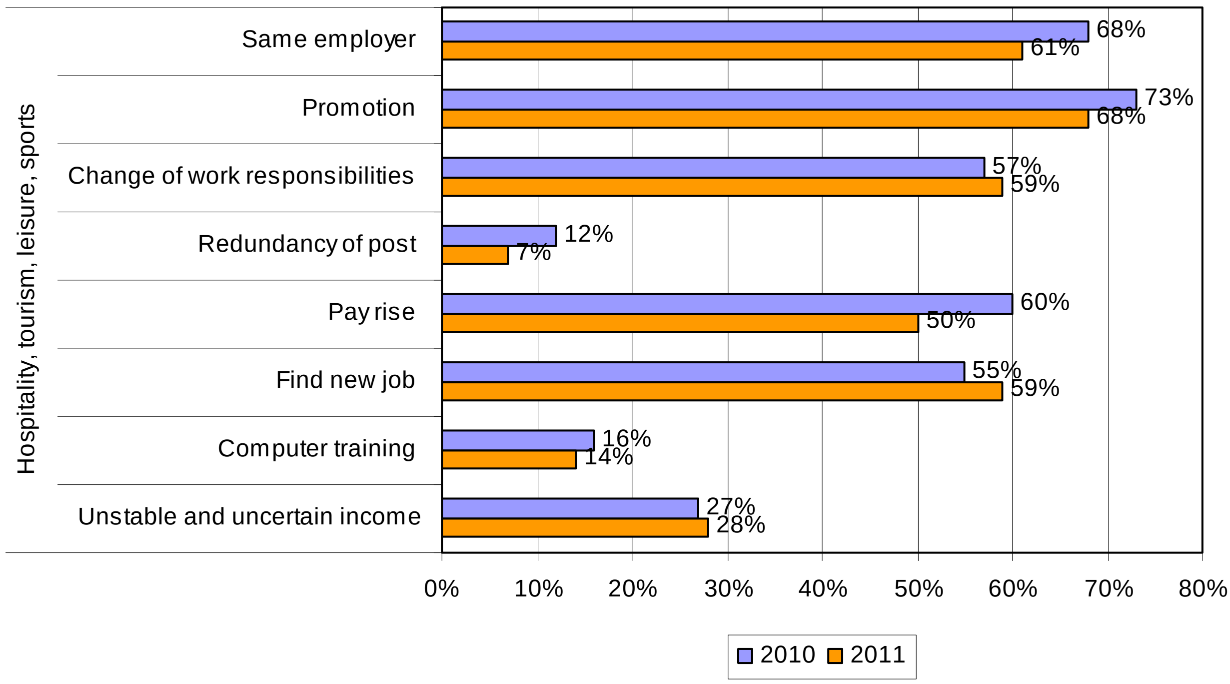


Table 37: Percentage of employees satisfied with various aspects of work

	Year of the survey		
Sector	2010	2011	% change
Job	59%	57%	-3%
Wage	19%	22%	16%
Commuting time	69%	67%	-3%
Combination of work and family life	45%	45%	0%
Job security	63%	66%	5%
Working environment	63%	65%	3%
Working hours	50%	48%	-4%
Colleagues	71%	77%	8%
Superiors	60%	59%	-2%
Employer's approach to pay	31%	32%	3%
Allowances/bonuses	19%	17%	-11%
Kind of contract	33%	40%	21%

Table 38: Percentage of employees satisfied with life

	Year of the survey	
	2010	2011
% of respondents	88%	87%
Annual % change		-1%

1.7 Industrial production, manufacture, metal

Summary

In the Industrial production, manufacture and metal sector the median gross hourly wage increased by 6.8% from 14.8€ in 2010 to 15.8% in 2011. The percentage of employees receiving a holiday allowance increased by 4 percentage points to 48%. The incidence of profit sharing rose by 3 percentage points to 12% in 2011. All other bonuses remained stable or only underwent minor changed (see Table 39 and Figure 24).

Developments in median gross hourly wages in the period 2010 – 2011 show that women working as technicians earned 8% less than their male colleagues. A gender pay gap is also obvious in other occupations: women earned 12% less when working as clerical support workers, 2.5% less when working as craft workers and 22% less when working as machine operators and assemblers (see Table 40).

The proportion of employees with permanent or fulltime employment contracts, as well as the employees working irregular hours, decreased. However, we observe an increase of regular work on Saturdays and Sundays in 2011. As a result of decrease in paid overtime, the practice of non-compensation and partial compensation increased (see Table 41 and Figure 25).

Evidence on employers' organizational history, comparing 2010 and 2011, shows that fewer employees reported redundancies, voluntary retirement, reorganization, and a competent management strategy in the past 12 months. In terms of employee expectations in 2011, relatively more employees expected a change in work responsibilities, a pay rise, and computer training (see Table 42 and Figure 26).

In terms of employee satisfaction, a smaller proportion of employees was satisfied with employer approach to pay, allowances/bonuses and the kind of employment contract in 2011 when compared to 2010. In 2011, we note only a minor increase in employees dissatisfied with life as-a-whole when compared to 2010 (see Table 43 and Table 44).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 39: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	14.8 €	15.8 €
Annual % Change		6.8%

Figure 24: Overview of bonuses given to employees; percentage of employees

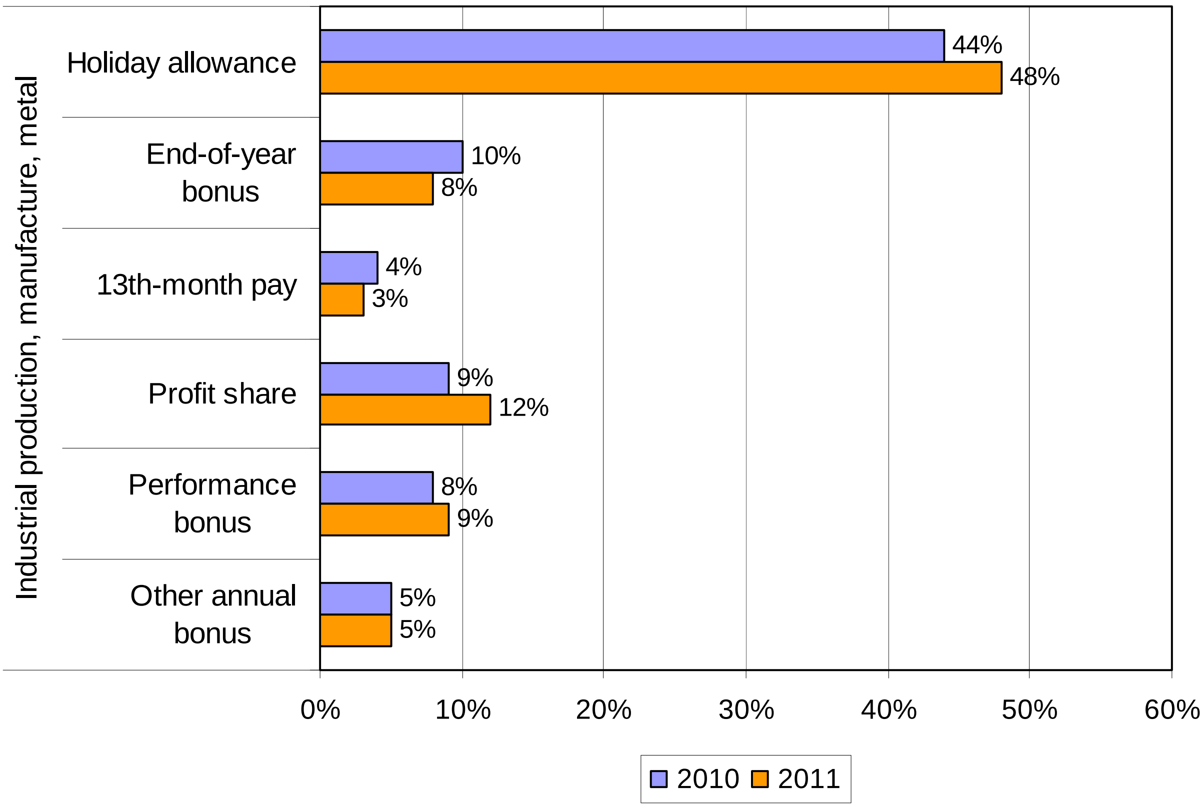


Table 40: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Technicians and associate professionals	17.9	16.5	-8%
Clerical support workers	17.1	15.2	-12%
Craft and related trades workers	14.7	14.3	-2.5%
Plant and machine operators, and assemblers	14.4	11.2	-22%

Note: Reported only for occupational groups with at least 100 observations

Table 41: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	85%	82%	-4%
Full-time working hours	91%	90%	-1%
Work shifts or irregular hours	53%	51%	-4%
Regular work on Saturdays	33%	34%	3%
Regular work on Sundays	20%	21%	5%
Regular work in the evenings	46%	45%	-2%

Figure 25: Overview of overtime compensation; percentage of employees

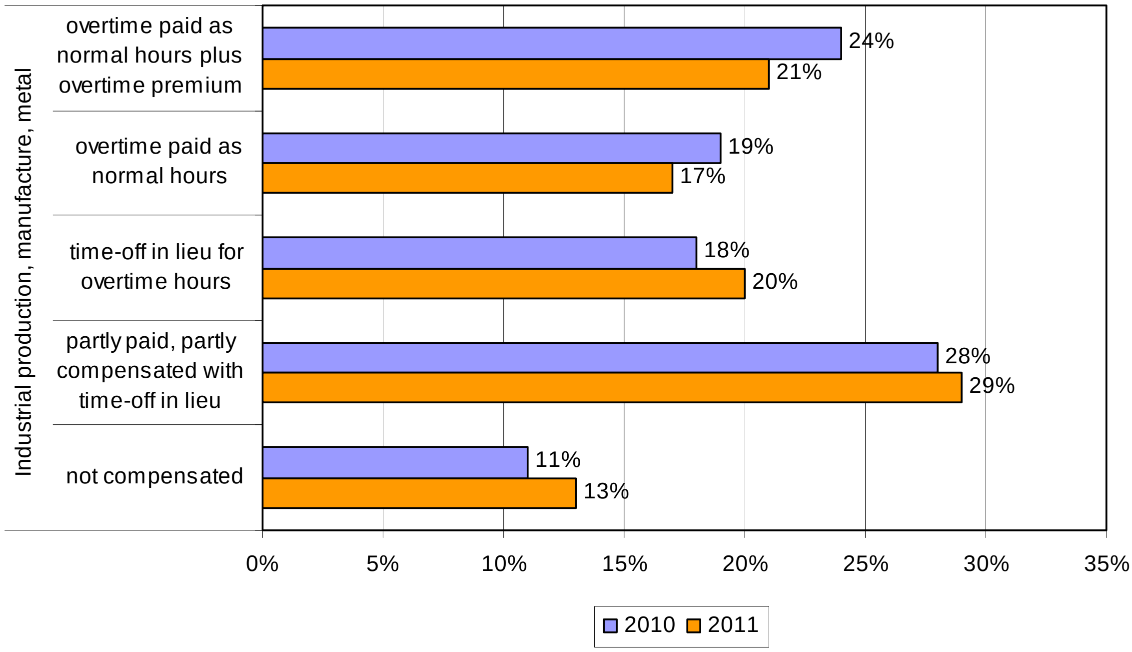


Table 42: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	34%	25%	-26%
Training opportunities	42%	39%	-7%
Reorganisation	15%	11%	-27%
New strategic initiatives	48%	51%	6%
Announcement of voluntary retirement	12%	6%	-50%
Merger with another organisation	15%	16%	7%
Renewal of computer equipment	36%	49%	36%
Competent management strategy	41%	37%	-10%

Figure 26: Percentage of employees expecting various scenarios in the next 12 months

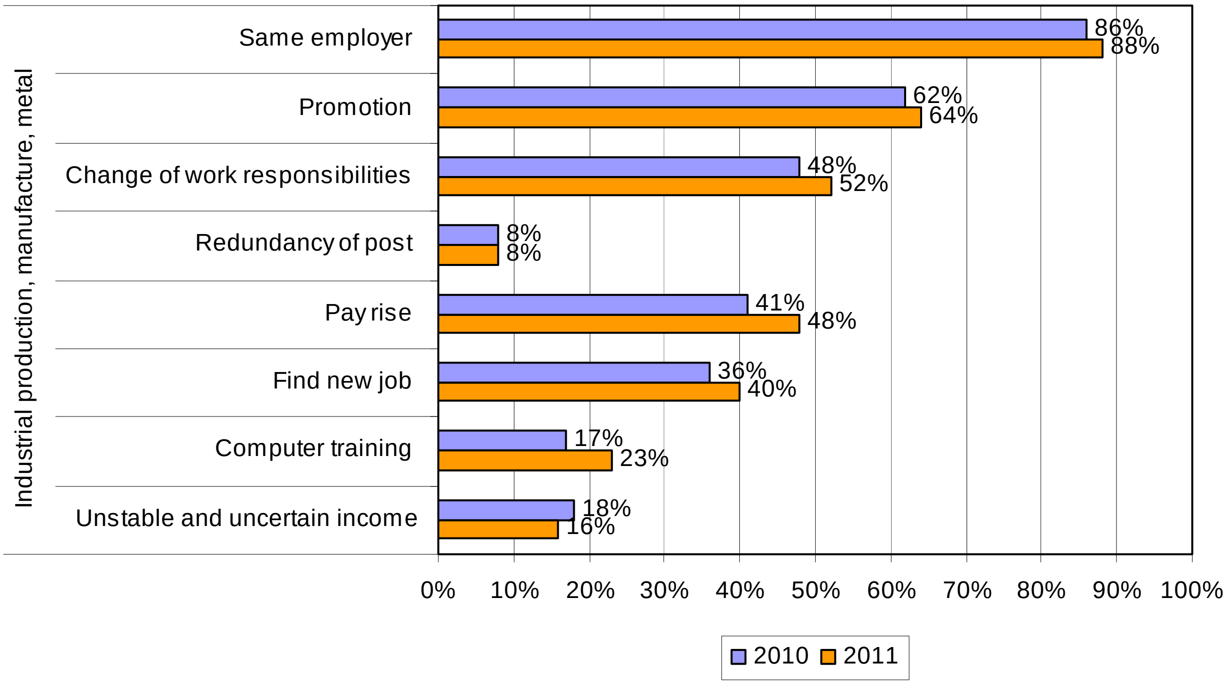


Table 43: Percentage of employees satisfied with various aspects of work

Sector	Year of the survey 2010	2011	% change
Job	58%	58%	0%
Wage	25%	25%	0%
Commuting time	62%	65%	5%
Combination of work and family life	59%	60%	2%
Job security	58%	61%	5%
Working environment	55%	54%	-2%
Working hours	61%	58%	-5%
Colleagues	71%	70%	0%
Superiors	53%	55%	4%
Employer's approach to pay	34%	24%	-29%
Allowances/bonuses	33%	29%	-12%
Kind of contract	56%	47%	-16%

Table 44: Percentage of employees satisfied with life

	Quarter of the survey 2010	2011
% of respondents	90%	89%
Annual % change		-1%

1.8 IT, automation, telecommunication

Summary

In the IT, automation and telecommunication sector the median gross hourly wage increased by 2.3% from 17.3€ in 2010 to 17.7€ in 2011. Increase of 4 percentage points is observed in the prevalence of holiday allowances applicable to 52% of employees in 2011. Other bonuses remained stable or only underwent minor changes (see Table 45 and Figure 27).

In terms of the median gross hourly wage, in the period 2010 – 2011 female professionals earned 4% less than their male colleagues. In particular, female earned 8% less when working as technicians and 2% less when working as clerical support workers (see Table 46).

Employment contracts as well as working hours were relatively stable in this sector. The incidence of overtime paid as normal hours rose in 2011; while other forms of overtime compensation diminished or remained stable (see Table 47 and Figure 28).

New strategic initiatives, mergers with another organization, and a competent management strategy were reported by more employees in 2011 than in 2010. Employee expectations were balanced in 2011, the only exception being the decline in expected promotions (see Table 48 and Figure 29).

The 2011 survey shows a positive percentage change in all reported aspects of work satisfaction except for employee satisfaction with allowances/bonuses (decline) and employees satisfaction with the kind of one's employment contract (no trend in positive or negative direction). Only a minor increase is observed in employees that are satisfied with life as-a-whole in 2011 (see Table 49 and Table 50).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 45: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	17.3 €	17.7 €
Annual % Change		2.3%

Figure 27: Overview of bonuses given to employees; percentage of employees

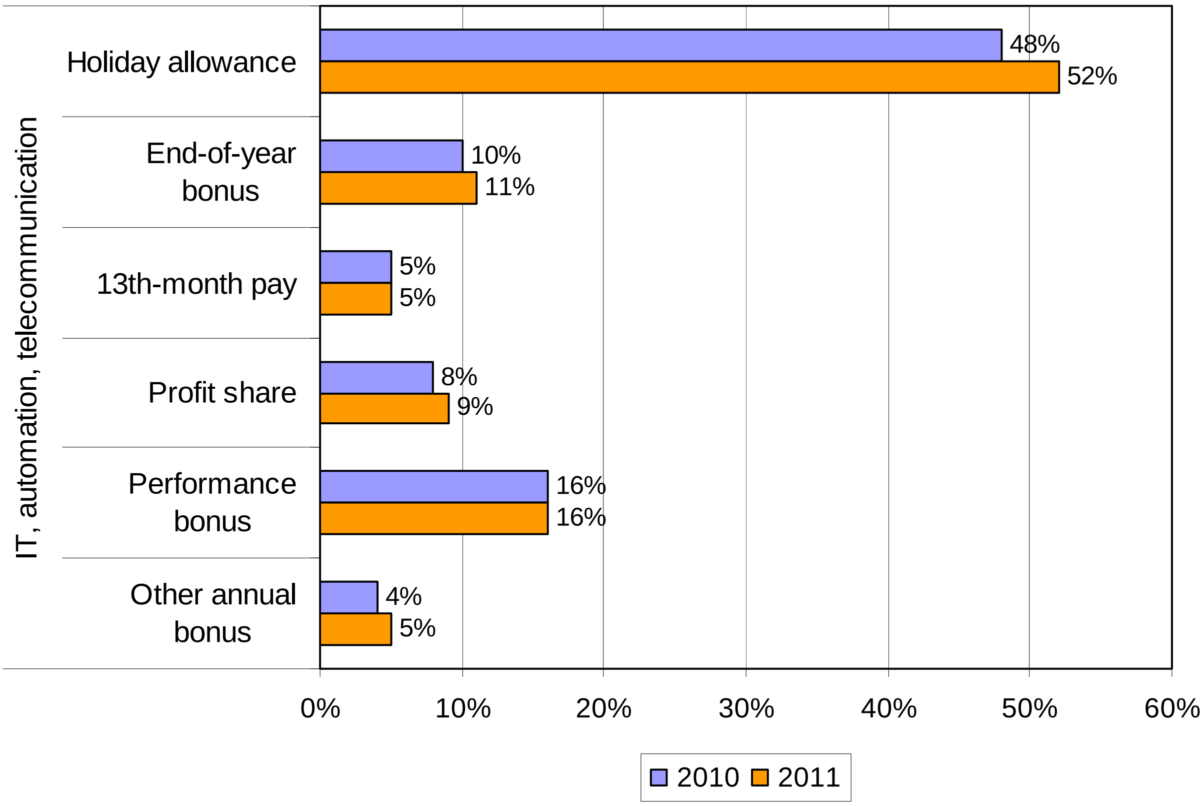


Table 46: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	19	18.2	-4%
Technicians and associate professionals	14.8	13.6	-8%
Clerical support workers	13	12.7	-2%

Note: Reported only for occupational groups with at least 100 observations

Table 47: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	83%	81%	-2%
Full-time working hours	88%	87%	-1%
Work shifts or irregular hours	21%	21%	0%
Regular work on Saturdays	13%	13%	0%
Regular work on Sundays	9%	8%	-11%
Regular work in the evenings	34%	34%	0%

Figure 28: Overview of overtime compensation; percentage of employees

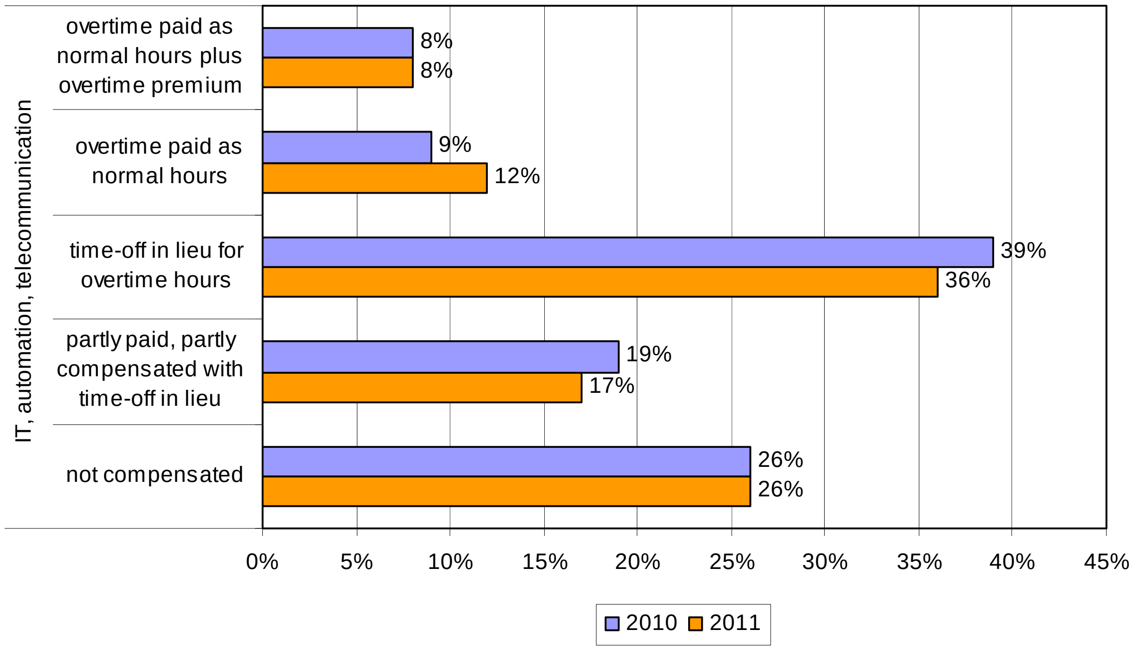


Table 48: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	34%	36%	6%
Training opportunities	66%	58%	-12%
Reorganisation	17%	19%	12%
New strategic initiatives	60%	68%	13%
Announcement of voluntary retirement	7%	3%	-57%
Merger with another organisation	16%	23%	44%
Renewal of computer equipment	45%	50%	11%
Competent management strategy	49%	55%	12%

Figure 29: Percentage of employees expecting various scenarios in the next 12 months

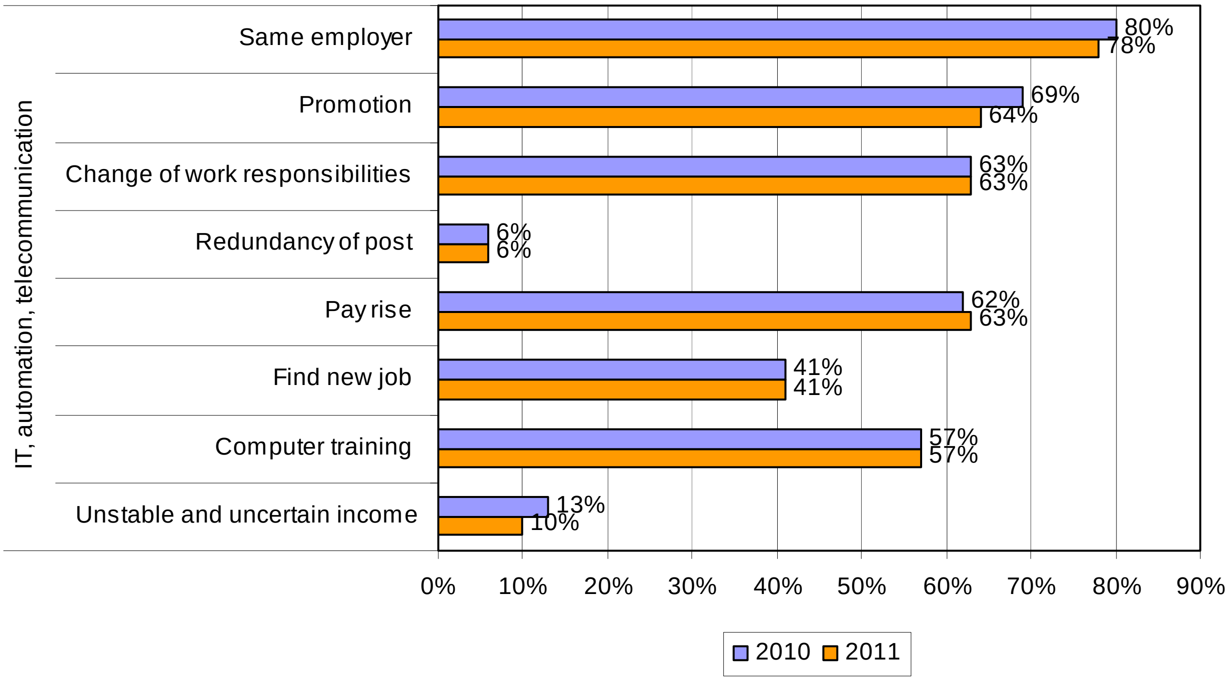


Table 49: Percentage of employees satisfied with various aspects of work

	Year of the survey		
Sector	2010	2011	% change
Job	59%	65%	10%
Wage	29%	33%	14%
Commuting time	49%	53%	8%
Combination of work and family life	53%	59%	11%
Job security	76%	79%	4%
Working environment	63%	68%	8%
Working hours	61%	66%	8%
Colleagues	74%	75%	1%
Superiors	60%	66%	10%
Employer's approach to pay	36%	38%	6%
Allowances/bonuses	36%	33%	-8%
Kind of contract	50%	50%	0%

Table 50: Percentage of employees satisfied with life

	Year of the survey	
	2010	2011
% of respondents	91%	92%
Annual % change		1%

1.9 Marketing, PR, advertising

Summary

In the Marketing, PR and Advertising sector the gross median hourly wage rose by 6% from 15.1€ in 2010 to 16€ in 2011. The percentage of employees receiving holiday allowance increased by 5 percentage points from 48% in 2010 to 53% in 2011. All the other bonuses remained stable or underwent only minor changes (see Table 51 and Figure 30).

As median gross hourly wages show, in the period 2010 – 2011 female professionals in general earned 6% less than their male colleagues. More balanced wages and a positive gender pay gap of 1% applies to the clerical support workforce (see Table 52).

The Marketing, PR and Advertising sector experienced a decrease in the percentage of permanent employees as well as fulltime employees. Next, the proportion of employees working irregular hours or in the evenings declined, while the incidence of regular work during weekends increased. A high rate of non-compensation of the overtime still persisted in 2011 (see Table 53 and Figure 31).

Regarding organizational changes among employers in the 2011 survey, we observe a significant decrease in the proportion of employees that report an announcement of redundancies in the past 12 months of the organization. Next, a higher percentage of employees expected promotion in 2011; however, fewer employees predicted a pay rise in the next 12 months in comparison to 2010 (see Table 54 and Figure 32).

In terms of employee satisfaction, we can conclude that relatively more employees were satisfied with employers' approach to pay, wages, allowances/bonuses and kinds of employment contracts in 2011. A one percentage point increase is observed in the proportion of employees satisfied with life as-a-whole (see Table 55 and Table 56).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 51: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	15.1 €	16 €
Annual % Change		6%

Figure 30: Overview of bonuses given to employees; percentage of employees

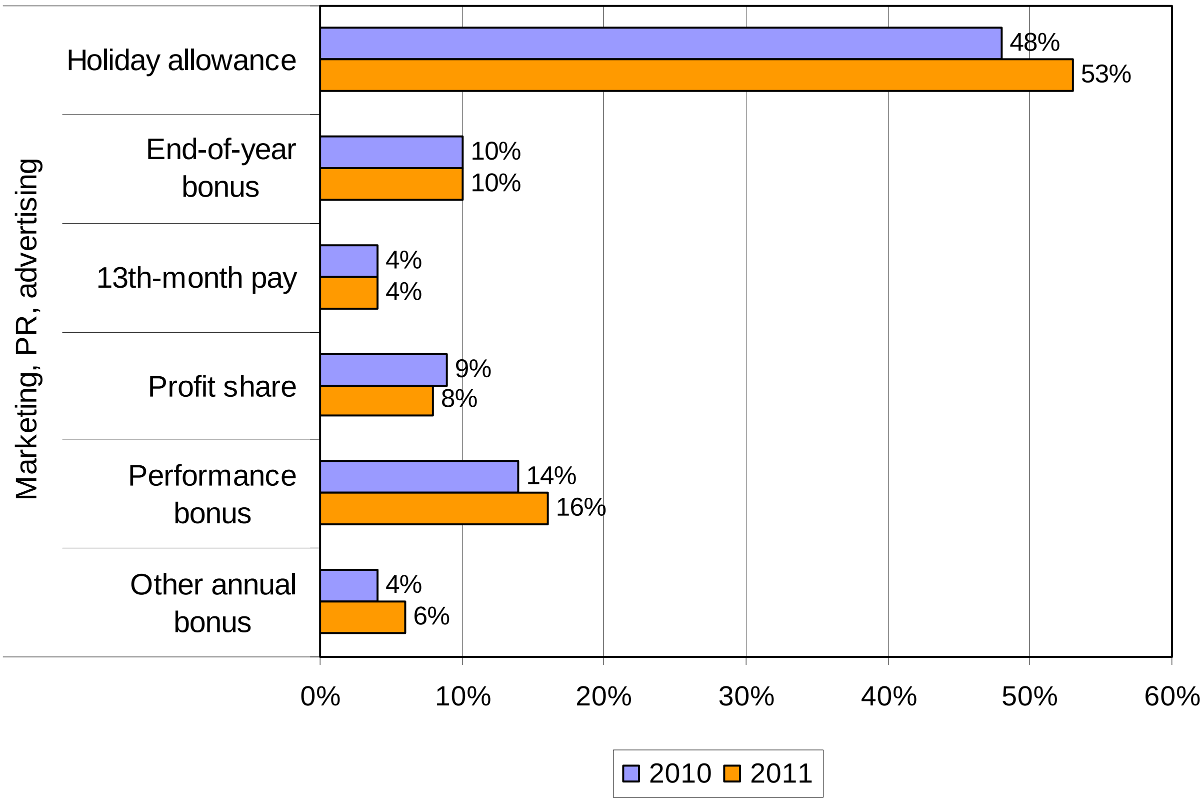


Table 52: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	18.4	17.3	-6%
Clerical support workers	13.7	13.8	1%

Note: Reported only for occupational groups with at least 100 observations

Table 53: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	73%	62%	-15%
Full-time working hours	78%	76%	-3%
Work shifts or irregular hours	17%	16%	-6%
Regular work on Saturdays	12%	15%	25%
Regular work on Sundays	8%	9%	13%
Regular work in the evenings	38%	35%	-8%

Figure 31: Overview of overtime compensation; percentage of employees

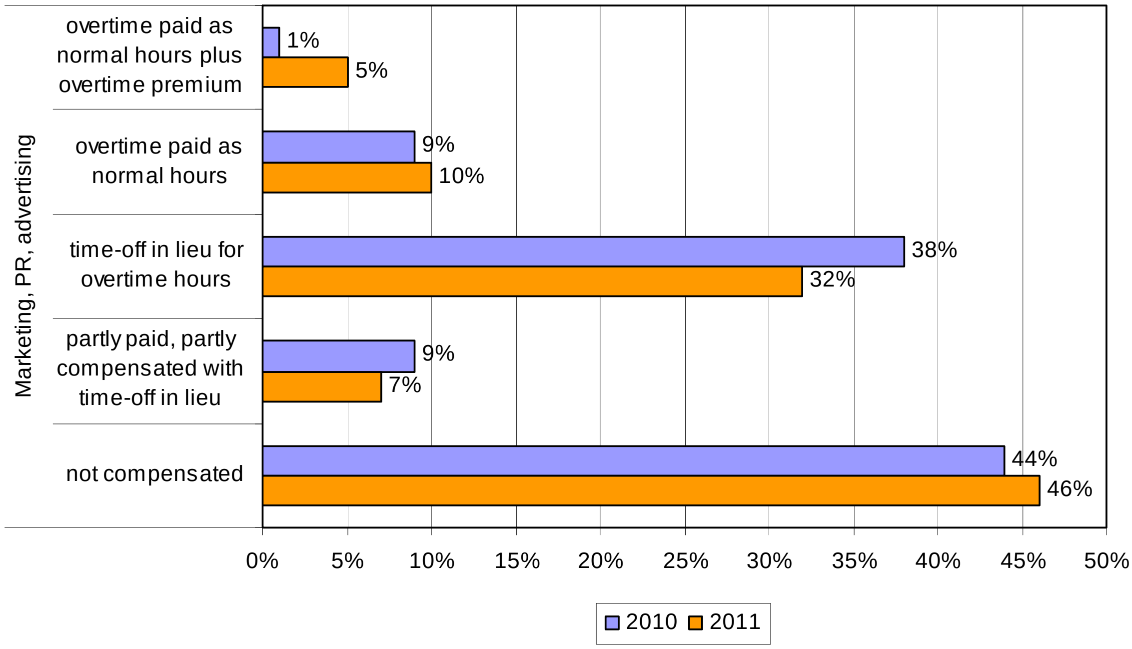


Table 54: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	44%	33%	-25%
Training opportunities	43%	45%	5%
Reorganisation	16%	15%	-6%
New strategic initiatives	61%	65%	7%
Announcement of voluntary retirement	5%	6%	20%
Merger with another organisation	17%	19%	12%
Renewal of computer equipment	37%	41%	11%
Competent management strategy	41%	45%	10%

Figure 32: Percentage of employees expecting various scenarios in the next 12 months

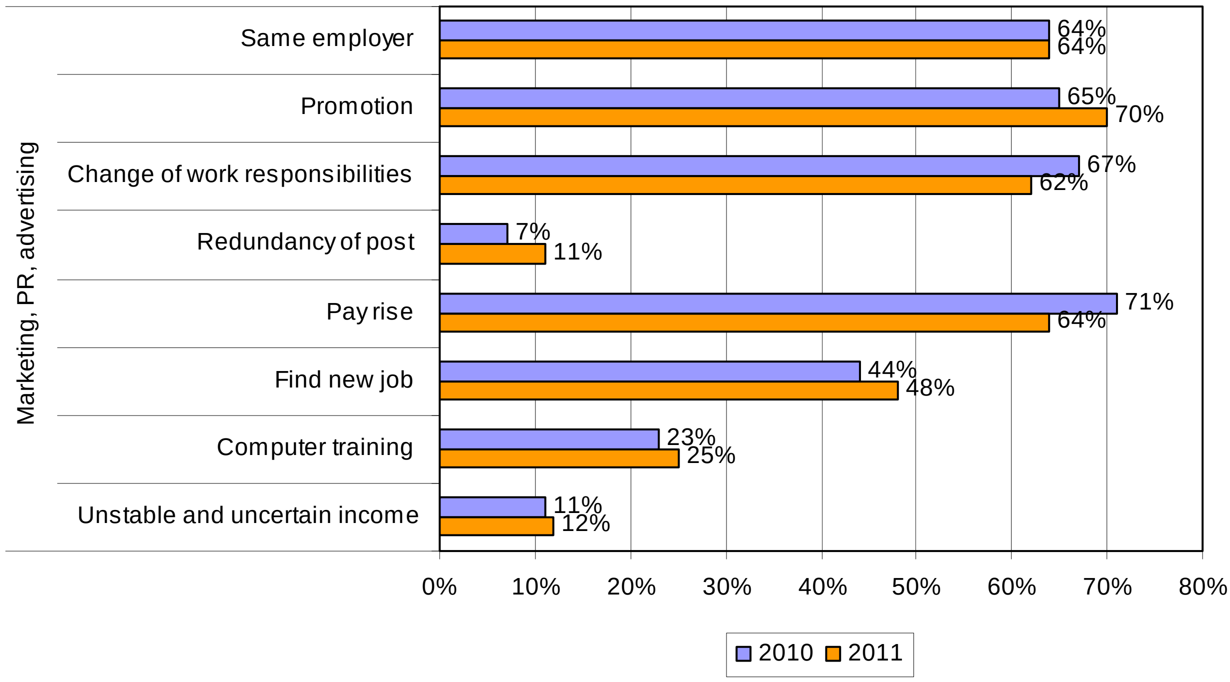


Table 55: Percentage of employees satisfied with various aspects of work

	Year of the survey		
Sector	2010	2011	% change
Job	67%	65%	-3%
Wage	25%	31%	24%
Commuting time	54%	64%	19%
Combination of work and family life	57%	64%	12%
Job security	82%	83%	1%
Working environment	72%	69%	-4%
Working hours	65%	65%	0%
Colleagues	82%	76%	-7%
Superiors	66%	63%	-6%
Employer's approach to pay	36%	40%	11%
Allowances/bonuses	27%	37%	37%
Kind of contract	44%	53%	20%

Table 56: Percentage of employees satisfied with life

	Year of the survey	
	2010	2011
% of respondents	93%	94%
Annual % change		1%

1.10 Transport, logistics, port, airport

Summary

In the Transport, logistics, port and airport sector the gross median wage increased by 5.3% from 13.3€ in 2010 to 14€ in 2011. The percentage of employees receiving holiday allowances or performance bonuses slightly increased. At the same time, the end-year bonus remained stable while the 13th monthly pay and profit share bonuses decreased. (see Table 57 and Figure 33)

In terms of a gender pay gap in median gross hourly wages between 2010 – 2011, female clerical support workers earned 3% less than their male colleagues. Women also earned 9% less when working as machine operators and assemblers and 8% less when working in elementary occupations (see Table 58).

The incidence of permanent as well as fulltime working contracts changed slightly or remained stable in 2011. A decrease in working hours outside normal working hours during weekdays, except for regular work in the evenings, is observed. If we focus on overtime compensation, the pattern of rising non-compensatory practice is observed in 2011 (see Table 59 and Figure 34).

Based on the 2011 survey we can conclude that the number of redundancies diminished in the past 12 moths, when compared to the 2010 survey. Simultaneously, fewer employees expected to stay with the same employer in the next 12 months, which means an increase among employees possibly eager to find a new job (see Table 60 and Figure 35).

Relatively fewer employees were satisfied with their job, their employer's approach to pay, allowances/bonuses and their kind of employment contract in 2011 than in 2010. A 2% decrease is observed in employee satisfaction with life as-a-whole (see Table 61 and Table 62).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 57: Median gross hourly wage

	Year of the survey	
	2010	2011
Median	13.3 €	14 €
Annual % Change		5.3%

Figure 33: Overview of bonuses given to employees; percentage of employees

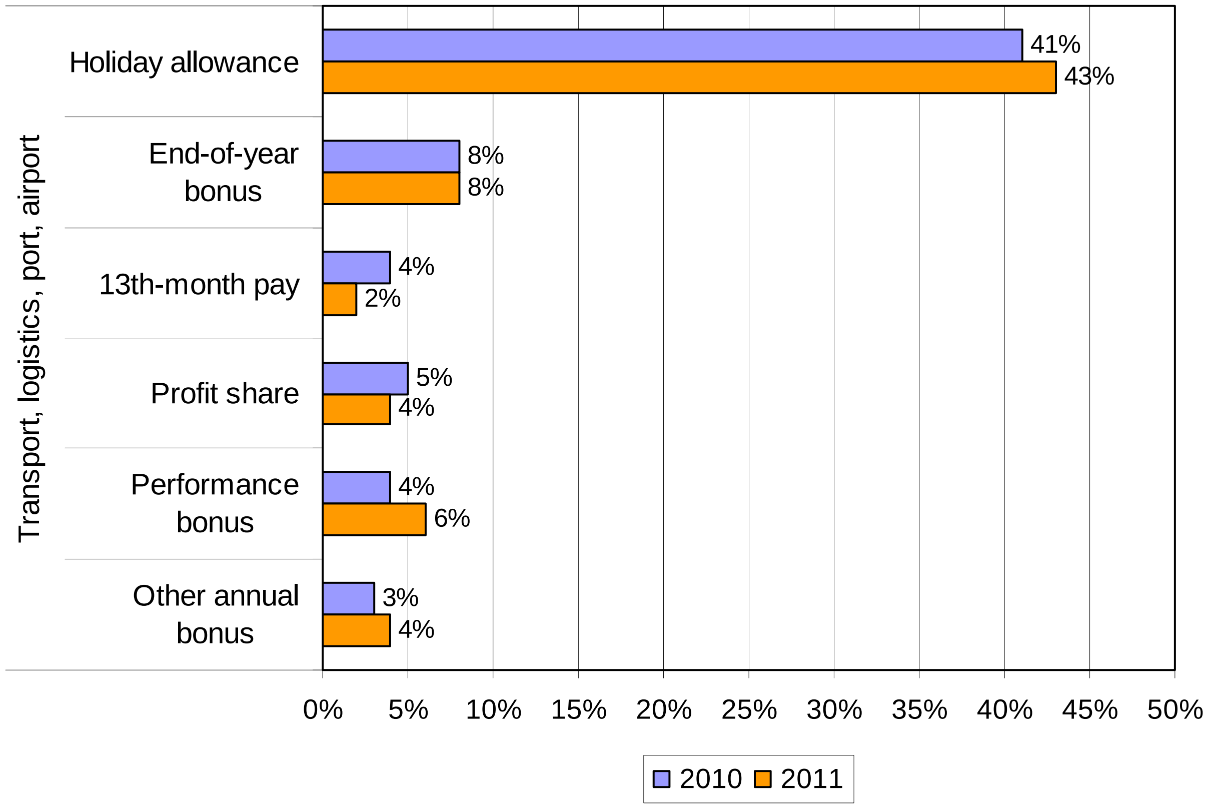


Table 58: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Clerical support workers	14.2	13.7	-3%
Plant and machine operators, and assemblers	12.7	11.6	-9%
Elementary occupations	12.6	11.6	-8%

Note: Reported only for occupational groups with at least 100 observations

Table 59: Working hours; percentage of employees

	Year of the survey		
	2010	2011	% change
Permanent employment contract	76%	74%	-3%
Full-time working hours	87%	87%	0%
Work shifts or irregular hours	57%	51%	-11%
Regular work on Saturdays	50%	45%	-10%
Regular work on Sundays	34%	31%	-9%
Regular work in the evenings	57%	58%	2%

Figure 34: Overview of overtime compensation; percentage of employees

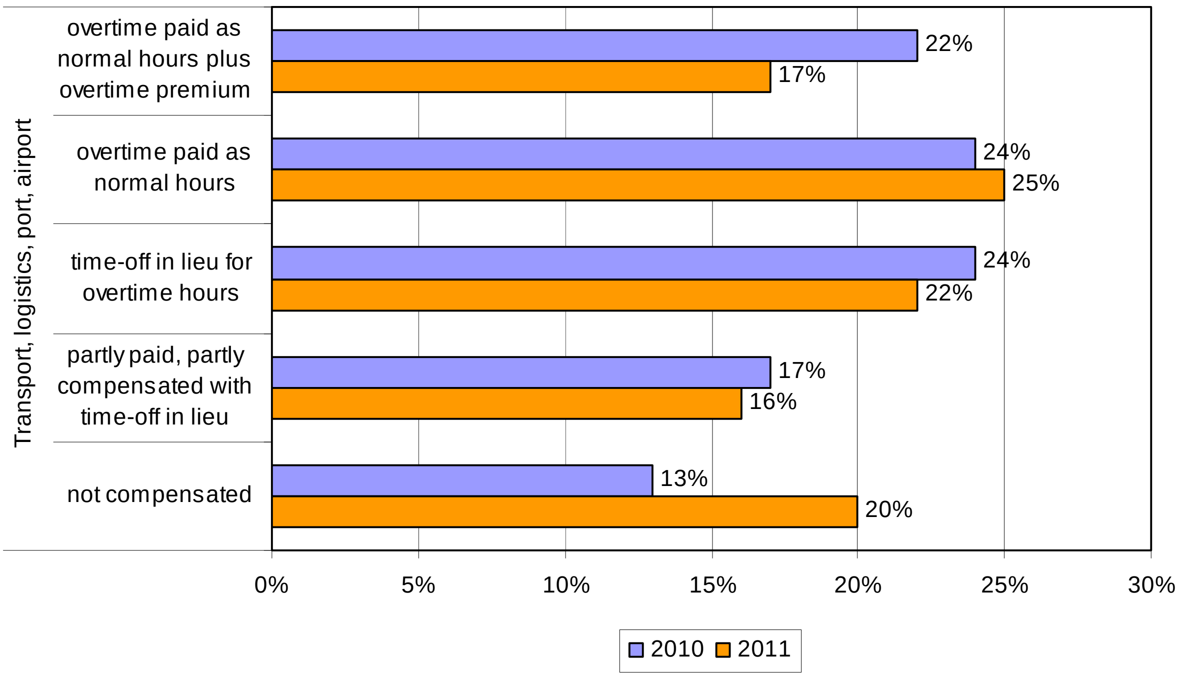


Table 60: Percentage of employees reporting past 12 months of the organization

	Year of the survey		
	2010	2011	% change
Announcement of redundancies	34%	29%	-15%
Training opportunities	41%	36%	-12%
Reorganisation	16%	18%	13%
New strategic initiatives	48%	46%	-4%
Announcement of voluntary retirement	8%	5%	-38%
Merger with another organisation	16%	17%	6%
Renewal of computer equipment	41%	46%	12%
Competent management strategy	41%	37%	-10%

Figure 35: Percentage of employees expecting various scenarios in the next 12 months

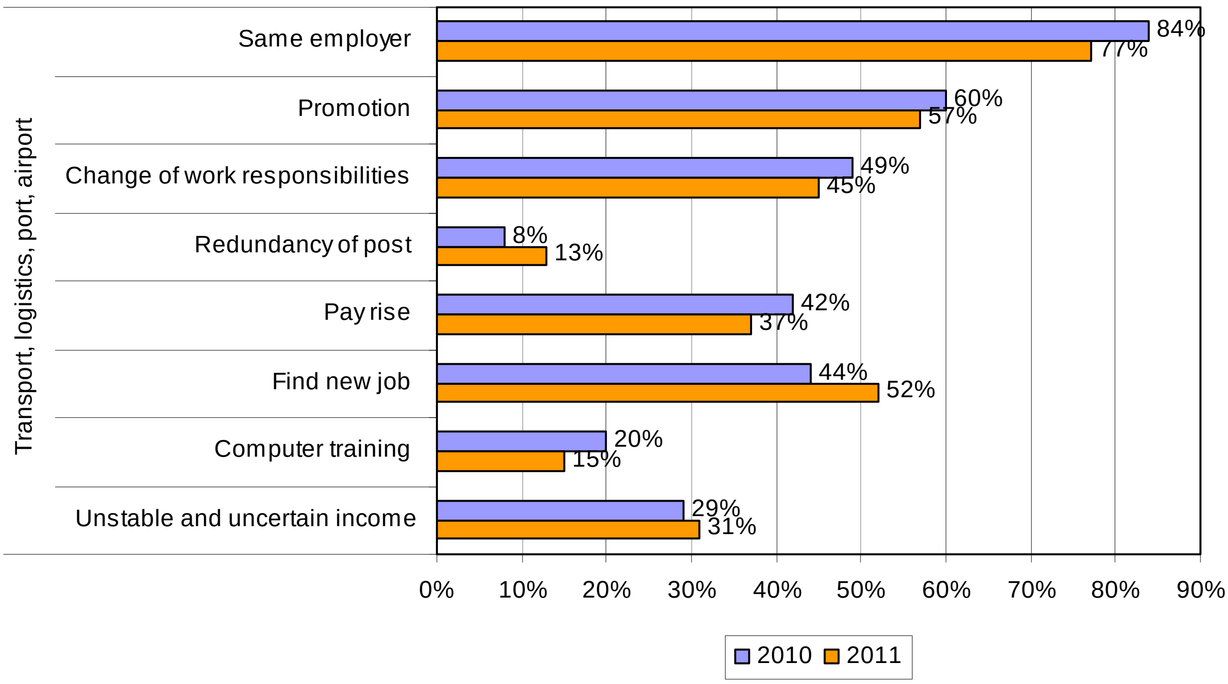


Table 61: Percentage of employees satisfied with various aspects of work

Sector	Year of the survey 2010	2011	% change
Job	63%	60%	-5%
Wage	24%	25%	4%
Commuting time	63%	67%	6%
Combination of work and family life	50%	52%	4%
Job security	59%	61%	3%
Working environment	58%	57%	-2%
Working hours	55%	55%	0%
Colleagues	69%	72%	4%
Superiors	54%	55%	2%
Employer's approach to pay	32%	30%	-6
Allowances/bonuses	35%	27%	-23%
Kind of contract	49%	46%	-6%

Table 62: Percentage of employees satisfied with life

	Year of the survey 2010	2011
% of respondents	89%	87%
Annual % change		-2%

2. Main sector developments 2006 – 2011

In this chapter we focus on major trends in wages and bonuses in the period 2006-2011 in two specific sectors[6]: Information and communication sector, and Financial and insurance activities sector.

2.1 Information and communication

In the Information and communication sector, the median gross hourly wage increased in the period 2006–2008 from 16.4€ to 17.8€; in the following period 2009 – 2010 it decreased to 16.5€, which is in the vicinity of the median gross hourly wage of 2006. In 2011 an increase by 4.2% to 17.2€ is observed (see Table 63).

The most common employee financial benefit is holiday allowance received by 81% to 92% of employees in the period 2006-2009. A large decline in the percentage of employees receiving holiday allowance is observed in the following period, when this benefit was applicable only to 46% of employees in 2010 and 50% of employees in 2011. A decrease of the incidence of all the other reported benefits is observed after year 2009: the percentage of workers receiving end-of-year bonus dropped from 8% in 2009 to 6% in 2011, 13th-month pay dropped from 12% to 4%, profit share dropped from 13% to 7% and performance bonus from 31% to 17% (see Table 64). This result is interesting in view of the more stable incidence of bonuses in the other sectors. We consider this to be an artefact of economic slow-down and resulting less generous compensation schemes in the Netherlands in the same period.

A higher percentage of employees reported announcement of redundancies during the past 12 months in their organization (34% - 40%) after 2008 than in the former years (less than 32%). After 2008 a decrease of training opportunities to the level of 51% is also observed. In the period 2009 – 2011, comparing to the previous years, organisations were less likely to have undergone reorganisation and a lower percentage of employees considered management strategy as competent (see Table 65).

[6] In this section we employ the NACE rev.2 classification of sectors, different from the one used in Chapter 1. As the consequence of the use of another classification, different results can be obtained for the years 2010-2011 in comparison to the results reported in Chapter 1. The following activities were excluded from the Information and communication sector: 1) Publishing activities, 2) Programming and broadcasting activities, 3) Motion picture, video and television programme production, sound recording and music publishing activities, and 4) News agency activities.

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 63: Median gross hourly wage

	Year of survey					
	2006	2007	2008	2009	2010	2011
Median	16.4	17.4	17.8	17.1	16.5	17.2
Annual % change		6.1%	2.3%	-3.9%	-3.5%	4.2%

Table 64: Overview of bonuses given to employees; percentage of employees

	Employee bonus				
Year of the survey	Holiday allowance	End-of-year bonus	13th-month pay	Profit share	Performance bonus
2007	81%	6%	9%	15%	31%
2008	92%	6%	9%	17%	41%
2009	86%	8%	12%	13%	31%
2010	46%	5%	5%	7%	18%
2011	50%	6%	4%	7%	17%

Table 65: Percentage of employees reporting past 12 months of the organization

	Past 12 months of organisations			
Year of the survey	Announcement of redundancies	Training opportunities	Reorganisation	Competent management strategy
2006	31%	65%	30%	60%
2007	20%	69%	31%	67%
2008	24%	71%	40%	67%
2009	39%	53%	18%	51%
2010	40%	64%	15%	54%
2011	34%	51%	15%	51%

2.2 Financial and insurance activities

In the Financial and insurance activities sector, the median gross hourly wage increased in the period 2006-2009 from 15.6€ in 2006 to 17.7€ in 2009. A minor annual decrease to 17.6€ is observed in 2010. The median gross hourly wage rose by 7.4% to the value 18.9€ in 2011 (see Table 66).

Holiday allowance as the most widespread financial bonus exhibits very high incidence, more than 85%, in the period 2007-2009. Beginning with the year 2010, the incidence of this benefit dropped down by approximately 30 percentage points. The percentage of employees given the second most common bonus – performance bonus – decreased from the value of 48% in 2008 to 28% in 2011. Profit share used to be the third most common bonus in the year 2007 (25%) and 2008 (27%), but it declined by more than 13 percentage points in the percentage of employees given this bonus in the later years. End-of-year bonus with the peak of its incidence in 2009, when 27% of employees received this bonus, declined to the value of 16 % in the later years. The last reported bonus, 13th month pay, covers less than 10% of employees after year 2008 (see Table 67). We interpret the lower incidence of the studied bonuses as an artefact of the economic slowdown after 2008.

A higher percentage of employees reported announcement of redundancies during the past 12 months in their organization in 2009-2011 than in 2006-2008. At the end of latter period, 33% of employees reported announcement of redundancies that is 25 percentage points less than in the year 2011 (58%). The incidence of training opportunities dropped after 2009 from the value of 77% in 2009 to 66% and 70% in the subsequent years. Decrease in the percentage of employees reporting reorganization and competent management strategy is observed during 2009-2011 (see Table 68).

For more detailed information see the following tables and figures (source for all: own calculations based on the WageIndicator Dataset).

Table 66: Median gross hourly wage

	year of survey					
	2006	2007	2008	2009	2010	2011
Median	15.6	17.2	17.5	17.7	17.6	18.9
Annual % change		10.3%	1.7%	1.1%	-0.6%	7.4%

Table 67: Overview of bonuses given to employees; percentage of employees

	Employee bonus				
Year of the survey	Holiday allowance	End-of-year bonus	13th-month pay	Profit share	Performance bonus
2007	85%	11%	10%	25%	39%
2008	95%	12%	10%	27%	48%
2009	92%	27%	6%	14%	36%
2010	60%	16%	7%	11%	28%
2011	63%	16%	7%	12%	28%

Table 68: Percentage of employees reporting past 12 months of the organization

	Past 12 months of organisations			
Year of the survey	Announcement of redundancies	Training opportunities	Reorganisation	Competent management strategy
2006	45%	77%	43%	61%
2007	31%	79%	40%	65%
2008	33%	78%	41%	60%
2009	48%	77%	36%	53%
2010	46%	66%	28%	46%
2011	58%	70%	31%	51%

3. Worldwide comparison of occupation 2011

The WageIndicator database enables a wage comparison across different occupational groups and across various countries in the European Union, Former Soviet Union, and Central and South America. Furthermore, the analysis may also consider Asian and African countries. Because of different price levels in the above countries, we employ two different indicators for the sake of comparability:

1. Gross and net wage in **international US dollars** express a wage in US dollarss that have the same purchasing power as the US dollars has in the USA

2. The **Big Mac wage** expresses a wage converted into the amount of Big Macs that an employee can afford to buy.

It should be stressed that although the latter is easier for comprehension and therefore more attractive, the former indicator is more encompassing and reaching beyond a single commodity comparison.

Based on the global analysis of wages in 4 occupational groups (1. managers, 2. professionals, 3. technicians and associate professionals, 4. clerical support workers) across 23 countries, it can be concluded that Dutch employees receive one of the highest wages among employees from all these countries.

Best paid managers can be found in the Netherlands, where the median gross hourly wage reaches the level of 26.1 international US dollars ($). In general, median gross hourly wages of managers are higher than 20$ in the western countries. The lowest gross hourly wages (6.3$) are found in Indonesia. The most Big Macs per hour can be enjoyed by managers as well as by all other studied occupational groups in the United Kingdom. With 22$ Dutch professionals occupy the third place in terms of median gross hourly wages. Better wages are offered in Germany (24.9$) and United Kingdom (23.6$) where we also found a higher amount of Big Macs per hour. Professionals from the UK can afford to buy more than 10 times more Big Macs per hour than their colleagues from Pakistan. Technicians from the Netherlands can expect the second best median gross hourly wages (19.5$). The same fact holds for Dutch clerical support workers (see Tables 63 -66).

Table 69: Global comparison of managers' wage

Managers	Median gross hourly wage in international US dollars	Median net hourly wage in international US dollars	Median amount of Big Macs per hour
Belgium	22.6	13.2	3.5
Finland	21.6	13.6	3.8
Germany	20.2	12.9	3.1
Netherlands	26.1	16.2	4.0
Spain	22.7	15.9	3.6
Sweden	23.4	15.9	3.1
United Kingdom	24.5	17.0	4.8
Czech Republic	13.6	9.7	2.0
Argentina	15.6	12.4	1.6
Brazil	9.1	7.4	1.4
Colombia	13.7	11.0	1.7
Mexico	12.1	8.9	2.4
Azerbaijan	9.3	7.0	.
Belarus	8.0	6.7	.
Kazakhstan	8.0	6.6	.
Russian Federation	8.7	7.4	2.2
Ukraine	6.5	5.1	.
Indonesia	6.3	5.2	1.5
South Africa	22.9	16.1	4.4

Source: WageIndicator (2010-2011); Purchasing power parity adjustment based on the IMF's WEO database (September 2011); Big Mac wage based on the Economist's Big Mac Index (July 2011)

Table 70: Global comparison of professionals' wage

Professionals	Median gross hourly wage in international US dollars	Median net hourly wage in international US dollars	Median amount of Big Macs per hour
Belgium	19.1	11.8	3.1
Finland	19.4	13.3	3.7
France	16.8	12.9	3.4
Germany	24.9	15.3	3.7
Italy	17.7	11.6	2.9
Netherlands	22.0	14.4	3.6
Spain	17.2	12.3	2.8
Sweden	19.6	13.9	2.7
United Kingdom	23.6	16.4	4.7
Czech Republic	10.6	8.0	1.6
Hungary	8.4	5.4	1.0
Argentina	13.1	10.6	1.3
Brazil	8.8	7.0	1.3
Colombia	8.1	6.4	1.0
Mexico	8.1	6.2	1.6
Azerbaijan	6.8	5.6	.
Belarus	6.7	5.6	.
Kazakhstan	6.3	5.1	.
Russian Federation	6.4	5.5	1.6
Ukraine	5.1	4.0	.
Pakistan	2.6	2.2	0.4
Indonesia	4.8	4.0	1.2
South Africa	20.0	14.8	4.1

Source: WageIndicator (2010-2011); Purchasing power parity adjustment based on the IMF's WEO database (September 2011); Big Mac wage based on the Economist's Big Mac Index (July 2011)

Table 71: Global comparison of technicians and associate professionals' wage

Technicians and associate professionals	Median gross hourly wage in international US dollars	Median net hourly wage in international US dollars	Median amount of Big Macs per hour
Belgium	16.9	10.9	2.9
Finland	16.6	11.8	3.3
France	15.9	12.1	3.2
Germany	20.2	13.0	3.2
Netherlands	19.5	13.0	3.2
Spain	15.0	10.8	2.4
Sweden	18.0	12.6	2.4
United Kingdom	18.8	13.2	3.8
Czech Republic	10.0	7.2	1.4
Hungary	6.5	4.3	0.8
Argentina	10.0	8.1	1.0
Brazil	5.3	4.4	0.8
Colombia	5.2	4.3	0.7
Chile	8.3	6.2	1.4
Mexico	5.8	4.5	1.2
Azerbaijan	6.6	6.0	.
Belarus	6.6	5.6	.
Kazakhstan	5.7	4.7	.
Russian Federation	6.6	5.6	1.7
Ukraine	4.7	3.7	.
Indonesia	4.1	3.4	1.0
South Africa	14.3	10.9	3.0

Source: WageIndicator (2010-2011); Purchasing power parity adjustment based on the IMF's WEO database (September 2011); Big Mac wage based on the Economist's Big Mac Index (July 2011)

Table 72: Global comparison of clerical support workers' wage

Clerical support workers	Median gross hourly wage in international US dollars	Median net hourly wage in international US dollars	Median amount of Big Macs per hour
Belgium	15.0	10.0	2.6
Finland	14.2	10.5	3.0
Germany	17.3	11.3	2.7
Netherlands	16.9	11.8	3.0
Spain	12.3	9.0	2.0
Sweden	15.9	11.9	2.3
United Kingdom	15.7	11.0	3.1
Czech Republic	8.3	6.4	1.3
Hungary	7.0	4.6	0.9
Argentina	8.0	6.4	0.8
Brazil	3.6	3.0	0.6
Colombia	3.9	3.3	0.5
Chile	6.0	4.4	1.0
Mexico	4.4	3.4	0.9
Azerbaijan	6.2	5.0	.
Belarus	5.8	5.0	.
Kazakhstan	6.1	5.0	.
Russian Federation	6.2	5.3	1.6
Ukraine	4.2	3.3	.
Pakistan	1.6	1.6	0.3
Indonesia	3.6	3.1	0.9
South Africa	9.9	7.9	2.2

Source: WageIndicator (2010-2011); Purchasing power parity adjustment based on the IMF's WEO database (September 2011); Big Mac wage based on the Economist's Big Mac Index (July 2011)

Appendix

Table 73: Structure of the whole sample in the Netherlands in the period 2010 - 2011

	Sample size	Education			Firm size					Tenure				Female workers
		Low	Middle	High	0 - 10	11 - 50	51 - 100	101 - 500	500+	0-2	3-5	6-10	11+	
Agriculture, nature, animals, environment	475	36%	53%	11%	39%	35%	6%	12%	7%	8%	11%	18%	63%	27%
Construction, fittings, housing	1840	41%	41%	18%	22%	42%	14%	15%	7%	5%	8%	17%	70%	10%
Education, research, training	992	7%	20%	73%	7%	31%	13%	26%	23%	7%	10%	15%	68%	56%
Finance, banking, insurance	2214	8%	43%	48%	15%	27%	8%	24%	27%	5%	11%	17%	67%	51%
Health care, paramedics, laboratory	1855	16%	50%	34%	15%	20%	8%	18%	40%	6%	7%	14%	73%	81%
Hospitality, tourism, leisure, sports	1489	28%	55%	17%	26%	43%	13%	12%	6%	6%	12%	24%	58%	59%
Industrial production, manufacture, metal	2202	38%	47%	16%	10%	32%	17%	26%	15%	4%	5%	11%	81%	16%
IT, automation, telecommunication	2178	8%	36%	56%	9%	24%	11%	23%	33%	7%	11%	18%	64%	16%
Marketing, PR, advertising	809	4%	16%	80%	14%	34%	13%	20%	19%	12%	14%	26%	48%	67%
Transport, logistics, port, airport	1979	47%	42%	11%	11%	26%	16%	27%	19%	3%	6%	12%	80%	18%
Total	16033	25%	42%	33%	15%	30%	12%	21%	21%	6%	9%	16%	69%	37%

	Region			
	North	East	West	South
Agriculture, nature, animals, environment	11%	24%	43%	22%
Construction, fittings, housing	12%	25%	41%	22%
Education, research, training	9%	23%	48%	19%
Finance, banking, insurance	7%	20%	53%	19%
Health care, paramedics, laboratory	13%	22%	47%	19%
Hospitality, tourism, leisure, sports	10%	21%	48%	20%
Industrial production, manufacture, metal	13%	26%	33%	28%
IT, automation, telecommunication	6%	22%	51%	20%
Marketing, PR, advertising	5%	15%	61%	19%
Transport, logistics, port, airport	8%	21%	46%	25%
Total	10%	22%	46%	22%

* Note: sample size equals number of respondents. Questions concerning education, firm size, tenure, gender and region were not answered by all respondents.

Wage Indicator Foundation

Plantage Muidergracht 12
1018 TV Amsterdam
The Netherlands

office@wageindicator.org

WageIndicator.org