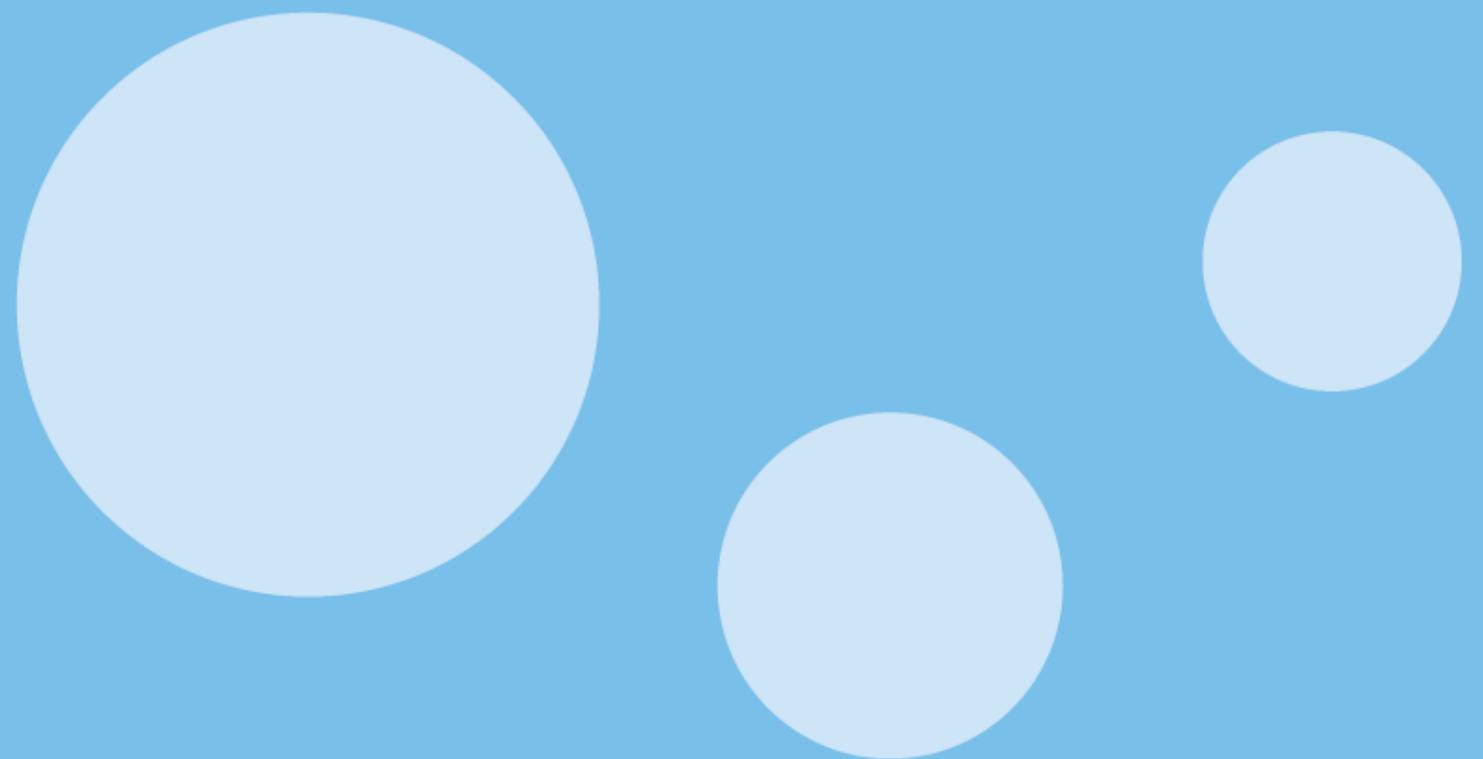


Wage Index

Sector Analysis of the Netherlands

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



WageIndicator.org

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The WageIndicator concept is owned by the independent, non-profit WageIndicator Foundation, established in 2003. Its Supervisory Board is chaired by the University of Amsterdam/Amsterdam Institute of Advanced Labour Studies, the Dutch Confederation of Trade Unions (FNV) and Monster career site. The Foundation aims for transparency of the labour market by sharing and comparing wage data and labour conditions information. The Foundation operates national websites in 70 countries. The websites have a so-called 3 pillar structure: for wages & salaries, for labour law, and for vacancies and education related information. In more than 20 countries - mainly in Africa, Asia, Central America - the national WageIndicator websites are supported with offline actions like face-to-face surveys, fact finding debates and media campaigns.

The Dutch WageIndicator website Loonwijzer has 500 000 visitors per month, approximately 80 % of whom are employees/workers and 20% employers.

WageIndicator Foundation operates globally through a network of associated, yet independent regional and national partner organizations like universities, media houses, trade unions and employers organizations, and self-employed specialists for legal, internet, media issues, with whom the Foundation engages in long lasting relationships. WageIndicator Foundation has offices in Amsterdam (HQ), Ahmedabad, Bratislava, Buenos Aires, Cape Town, Dar es Salaam, Maputo and Minsk.

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About CELSI

Central European Labour Studies Institute (CELSI) is an independent non-profit research institute based in Bratislava, Slovakia. It fosters multidisciplinary research about the functioning of labour markets and institutions, work and organizations, business and society, and ethnicity and migration in the economic, social, and political life of modern societies. Supported by its network of Research Fellows and Affiliates and a new Discussion Paper series, CELSI makes a contribution to the cutting-edge international scientific discourse. Hosting the Bratislava Office of the international WageIndicator project, CELSI provides expert data services.

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Monsterboard.nl is part of Monster, the worldwide leader in successfully connecting people to job opportunities. Monsterboard started on January 1998 in Amsterdam. At Monsterboard work 120 employees. With over 2 million visitors per month Monsterboard is leading in online recruitment in the Netherlands. Monsterboard brings qualified professionals and renowned companies together. We use the world's most advanced technology to match the right people to the right job. Using our technology and sublime service companies have maximum control in their recruitment process.

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Executive summary and key findings

The main purpose of this second Loonwijzer – Monsterboard Wage Index is to describe some of the key characteristics of the workforce in ten selected sectors of the Dutch labour 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*
- (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*
- (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 2012.

Finally, this report aims to compare wages worldwide. The last chapter focuses on 4 occupational groups across (up to) 23 countries:

- 1) managers*
- 2) professionals*
- 3) technicians and associate professionals*
- 4) clerical support workers.*

Some of the main findings include:

- *Overall, 2012 was a challenging year for the labour market environment in the Netherlands.*
- *Median wages in the Netherlands tended to stagnate or even decrease in 2012 across most sectors of the economy. In particular the agricultural sector did not have a good year in wage terms. The median wage of agricultural workers decreased more than 6 percent from 2011.*
- *End-of year bonus and performance bonus remained the most popular bonuses paid by Dutch employers, in addition to the “vakantietoelage” (holiday bonus).*
- *In most professions the inequality in compensation between the two genders persists, female workers typically get approx. 15% less than their male colleagues. The sole exceptions are some clerical support workers, in particular those working in the Marketing, PR and advertising sector who on average receive 8% more than their male colleagues. Furthermore, in comparison with the previous report, the size of pay gap has stagnated or even increased, which may be an indication that women are being hit harder than men by difficult conditions on the job market.*
- *Respondents reported an increase of redundancies announced at their workplace in comparison with 2011, finance being an exception in this regard. However, the situation is still better than it was back in 2010.*
- *Considering the near future, workers in construction, education, hospitality, industrial production, IT and marketing more often reported that they expect unstable and uncertain incomes.*
- *Dutch workers are generally satisfied with life: as in 2011 the share of respondents reporting being satisfied with life gravitates towards 90%.*

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Introduction and definitions

The main purpose of this regular Loonwijzer – Monsterboard Wage Index is to describe some of the key characteristics of the workforce in ten selected sectors of the Dutch labour market.

In the first chapter we analyze various sectors¹ of the Dutch labour market: (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 deeper on two selected sectors of the economy: 1. Information and communication, and 2. Financial and insurance activities. These crucial two areas of the labour market are scrutinized more closely via a longitudinal analysis covering the period of years 2006 – 2012.

The report closes with an international comparison of 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. In order to properly account for different price levels in different countries, we use median hourly wages in PPP dollars for comparison as well as the Economist magazine's Big Mac Index.

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 14,000 completed questionnaires in the WageIndicator Salary Survey (www.loonwijzer.nl) during the period of years 2011 - 2012.² Worldwide comparison draws on international dataset of the WageIndicator (2011-2012) and analyses wages of over 123,000 survey participants around world. All

The report focuses on six main areas: Gross hourly wage and bonuses, gender pay gap, working hours and overtime, restructuring expectations and restructuring in the past 12 months, satisfaction with work in detail, satisfaction with life as-a-whole. Below we provide more detailed definitions about these six main areas of concern:

¹ These sectors are derived from the occupational groups with the same names

² For more information about structure of the Dutch sample See the Appendix of this report.

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 median³ of gross hourly wage. In addition, frequencies of five types of bonuses are reported, i.e. holiday allowance, end-of-year bonus, 13th-month pay, profit share and performance bonus.

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

$$\text{Pay gap} = \frac{\text{Median wage}_{\text{female}} - \text{Median wage}_{\text{male}}}{\text{Median wage}_{\text{male}}} * 100\%$$

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 2011 – 2012 (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).

³ A median is the numeric value separating the upper half of a sample from its lower half. For example, by definition of median wage 50% of the sample earn more and 50% less than median wage.

Notes:

1. All findings in this report is relevant for the portion of the Dutch society that identifies itself as “employees”. In other words, nothing presented here is necessarily representative for working students, retirees, people with serious disabilities and self-employed workers.
2. Since the 2012 report, we have modified the method for excluding outliers with the aim to increase validity of our findings. Due to this change, some of the wage statistics calculated for 2011 might differ negligibly from those presented in the 2012 Wage Index report.

1. Sectoral comparison

Wages of Dutch workers continued to be under pressure in 2012. Only construction and transportation sectors recorded minor (between 0.7%-1.4%) increases in median hourly wage. Wages in finance, health care and IT were stable; workers in education, hospitality, industrial production and marketing earned 1.9%-3.5% less than they did in 2011. Agricultural workers saw their wages decline sharply by 6.6% compared to the previous year. Education, research and training as well as finance are still the sectors, where salaries are relatively the highest, while work in agriculture and hospitality, tourism and leisure is paid much less (See Table 1).

Table 1: Median gross hourly wage

Sector	Year of the survey		% change
	2011	2012	
Agriculture, nature, animals, environment (n=397)	13.7	12.8	-6.6%
Construction, fittings, housing (n=1,407)	14.8	15	1.4%
Education, research, training (n=837)	18.4	18	-2.2%
Finance, banking, insurance (n=1,882)	16.7	16.7	0%
Health care, paramedics, laboratory (n=1,581)	16.9	16.9	0%
Hospitality, tourism, leisure, sports (n=1,398)	11.3	10.9	-3.5%
Industrial production, manufacture, metal (n=1,650)	15.6	15.2	-2.6%
IT, automation, telecommunication (n=2,116)	17.6	17.6	0%
Marketing, PR, advertising (n=805)	15.9	15.6	-1.9%
Transport, logistics, port, airport (n=1,502)	13.8	13.9	0.7%
Total (n=13,575)	15.6	15.4	-1.3%

Source: WageIndicator (2011-2012), only employees taken into account.

Given the modest increase of wages, unsurprisingly the risk of poverty⁴ remained quite stable compared to the previous year. One exception is the agricultural sector, where it increased from 19% to 23 %. (See Table 2). Along with hospitality, tourism, leisure and sports sector, where the incidence of workers in the risk of poverty in our sample reached 27%, up to 26% in 2011, agriculture is the only sector where there are more than 20% of respondents in our sample facing the risk of poverty.

⁴ 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 9.4€/hour in 2011 and 9.3€/hour in 2012.

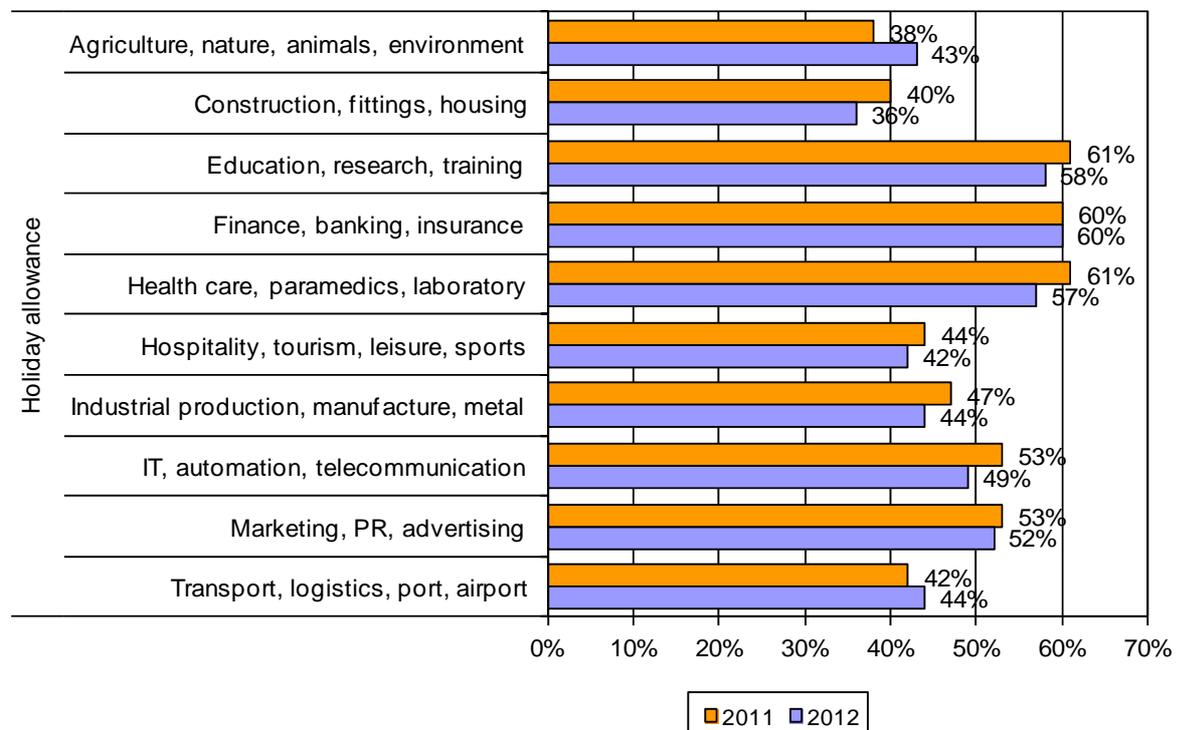
Table 2: Percentage of employees at risk of poverty (low pay)

Sector	Year of the survey	
	2011	2012
Agriculture, nature, animals, environment	19%	23%
Construction, fittings, housing	12%	12%
Education, research, training	5%	5%
Finance, banking, insurance	5%	5%
Health care, paramedics, laboratory	5%	7%
Hospitality, tourism, leisure, sports	26%	27%
Industrial production, manufacture, metal	8%	12%
IT, automation, telecommunication	6%	7%
Marketing, PR, advertising	7%	8%
Transport, logistics, port, airport	12%	14%

Source: WageIndicator (2011-2012), only employees taken into account.

Holiday allowance is the most common form of bonus payment. It is reported by 60% of workers in finance, 58% in education and 57% of workers in education industry. In construction, on the other hand, the share decreased to 36%.⁵ (See Figure1) End-of-year bonuses are quite common in education health care, both are received by 37% of respondents. Elsewhere they are limited to 4%-15% of employees. (See Figure2) Firms that motivate their employees through end-of year bonuses are active especially in IT (18%) and finance (both 17%). In other sectors such bonus is only received by at most 8% of employees. (See Figure 3).

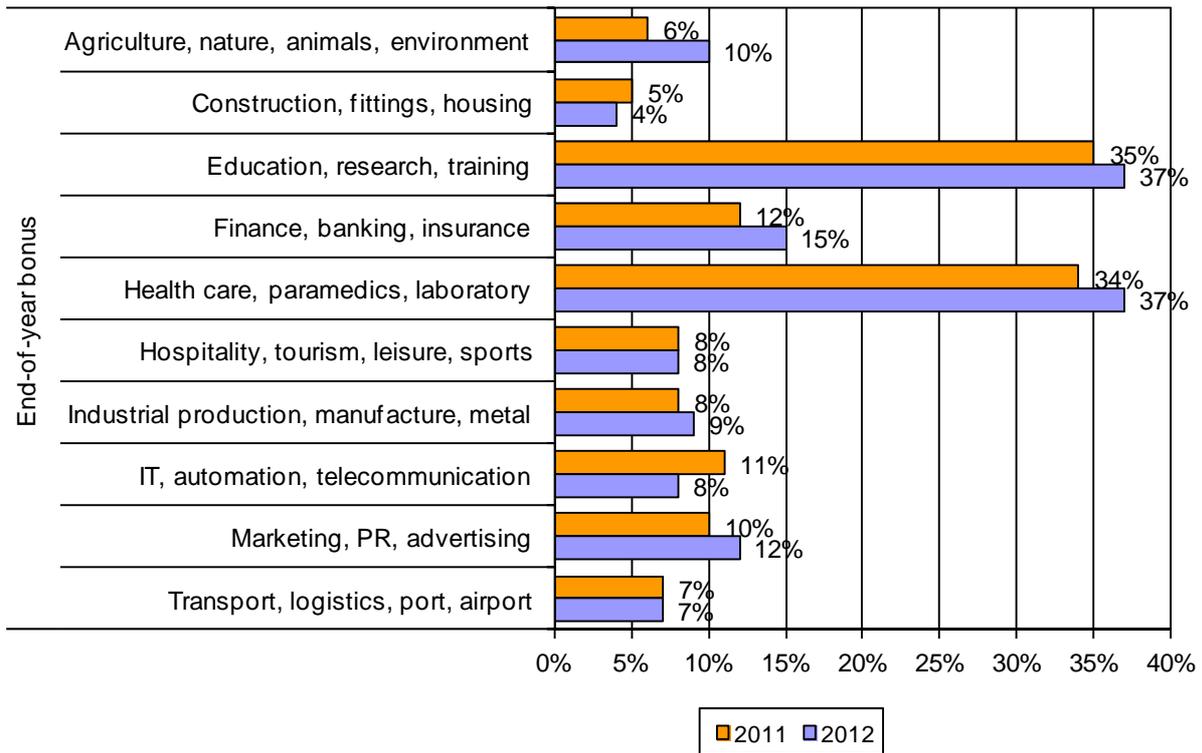
Figure 1: Percentage of employees receiving holiday allowance across sectors



Source: WageIndicator (2011-2012), only employees taken into account.

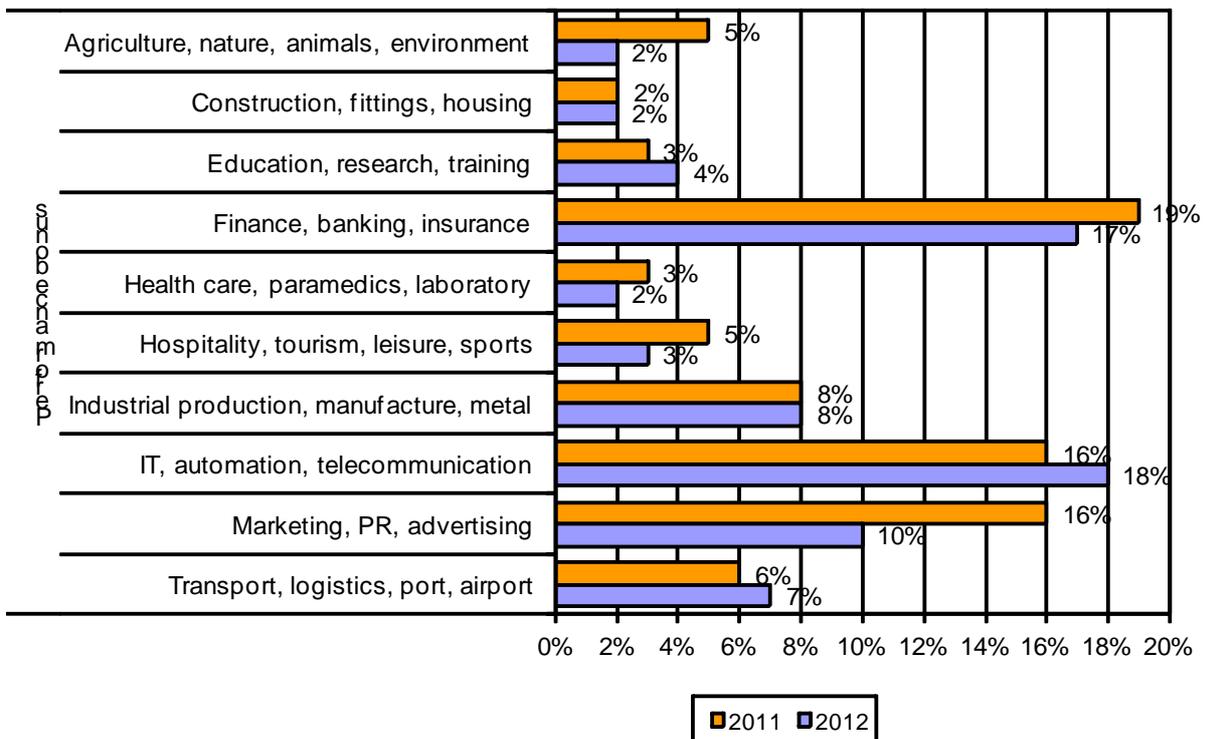
⁵ Without any doubt the actual share of employees receiving traditional Dutch 'vakantietoelag' is higher than the reported number. A substantial portion of respondents ceased to report this bonus, as since 2010 they are no longer required to indicate all received bonuses to proceed with the questionnaire.

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



Source: WageIndicator (2011-2012), only employees taken into account.

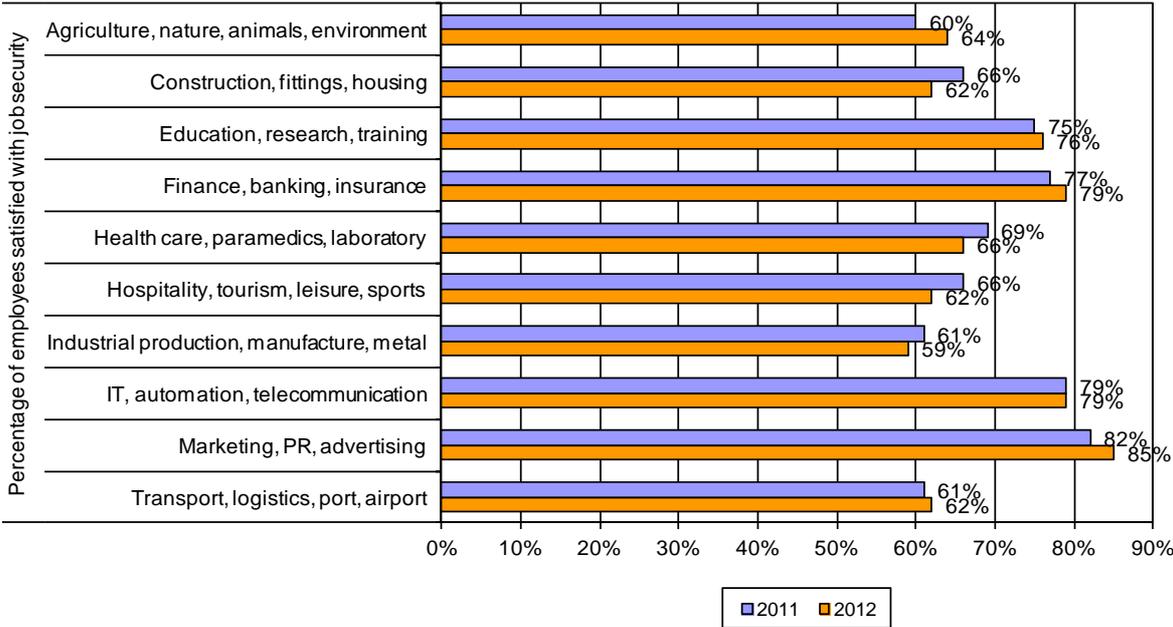
Figure 3: Percentage of employees receiving performance bonus across sectors



Source: WageIndicator (2011-2012), only employees taken into account.

In terms of job security, workers in marketing, PR and advertising feel most secure, as 85 % of them expressed this sentiment. Workers in industrial production, on the other hand, feel least secure. Only 59% of industrial workers indicated feeling secure at their job. Overall, this indicator was quite stable, the biggest decrease of satisfaction with job security was recorded in construction and hospitality sectors (by 4 percentage points). Workers in agriculture, on the other hand, became more satisfied (their satisfaction increased also by 4 percentage points). (See Figure 4)

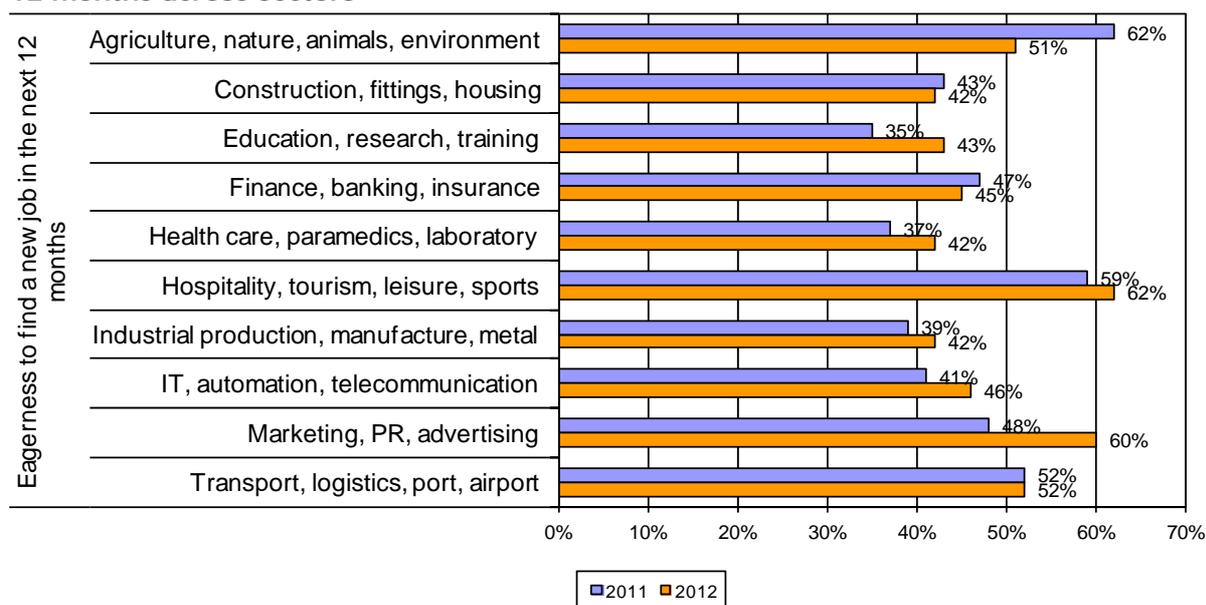
Figure 4: Percentage of employees satisfied with job security across sectors



Source: WageIndicator (2011-2012), only employees taken into account.

Only in hospitality and in marketing sectors, more than 60% of workers expressed willingness to look for a new job in the next 12 months. On the other hand in construction, industrial production and healthcare, only 42% of employees echoed this sentiment. The biggest increase in willingness was recorded in the marketing sector (by 12 percentage points), while the biggest decrease happened among agricultural workers (11 percentage points decrease). (See Figure 5)

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



Source: WageIndicator (2011-2012), only employees taken into account.

1.1 Agriculture, nature, animals, environment

Workers in the agricultural sector faced a more difficult labour market situation compared with the situation in 2011. Median wage decreased to 12.8€, 6.6% less than in 2012. The decline was however partly compensated by an increase of prevalence of end-of-the-year bonus payments from 6% to 10%. At the same time, employers were less prone to motivate their employees through performance bonuses (See Table 3 and Figure 6).

Gender wage gap i.e. median female wages of the skilled agricultural, fishery and forestry workers remained at -15% signifying little change in comparison to the previous report when median wages of female skilled workers was 16% lower than that of their male counterparts (See Table 4 and Table 4 in the 2012 Wage Index report).

Numerous interesting developments could be observed in the area of working hours. About three out of four employees in the agriculture sector worked full-time – less than in 2011, and approximately the same proportion had permanent contract as opposed to 2011 when permanent contracts were even more widespread, covering three out of four agricultural employees. The management of the actual working time differed markedly in comparison with the previous year. The number of employees working shifts or irregularly decreased by 14% to 32%, but employees were more often asked to work during weekends too. Half of workers had to come to work on Saturdays and 20% on Sundays, signifying a respective increase of 6 and 11 per cent vis-à-vis the previous year. Prevalence of evening work decreased slightly to 35%. In line with the shift to more regular overtime work was a change of compensation; the occurrence of unpaid overtime decreased sharply by 20 percentage points and employers have become more willing to compensate the extra work mostly by paying for overtime hour as if they were normal working

hours or exchanging overtime work for more time-off, to a lesser degree by paying a premium in addition to standard compensation (See Table 5 and Figure 7).

The difficult labour market in agriculture was evident in the changes of hiring behaviour of Dutch agricultural firms. 27% of respondents – 17% more than in the previous year - reported redundancies being announced. At the same time, it appears a lot of effort was invested in increasing productivity of employees. About one in five employees reported their firm had undergone reorganization in a sharp increase from the last year when it was only true for 7% of the firms. Companies increased investment both in employee training and computer equipment and developed new strategic initiatives. As a result, 42% of employees felt that their company has a competent management strategy, signalling a 11% increase in comparison with the previous year. Additionally, there was a decrease of voluntary retirement, which were reduced to negligible portion. Looking forward high proportion of employees prepare more for stability than for change, with 74% of them expecting to remain with the same employer. 51% of agricultural workers expected promotion and/or felt ready to look for a new job, signalling sharp decline from 2011 when the share was 58% and 62% respectively. (See Table 6 and Figure 8).

Employees satisfaction traditionally remained at high levels. However, there has also been a nontrivial decrease in overall satisfaction with life (by 6%, to 85%) and a decrease of satisfaction with the approach to allowances/bonuses and assignment of working hours. Nevertheless, employees also became more content – or given a declining tendency in this respect perhaps more grateful, with their pay and their employer's approach to employee compensation (See Table 7 and Table 8).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 3: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	13.7 €	12.8 €
Annual % change		-6.6%

Figure 6: Overview of bonuses received by employees; percentage of employees

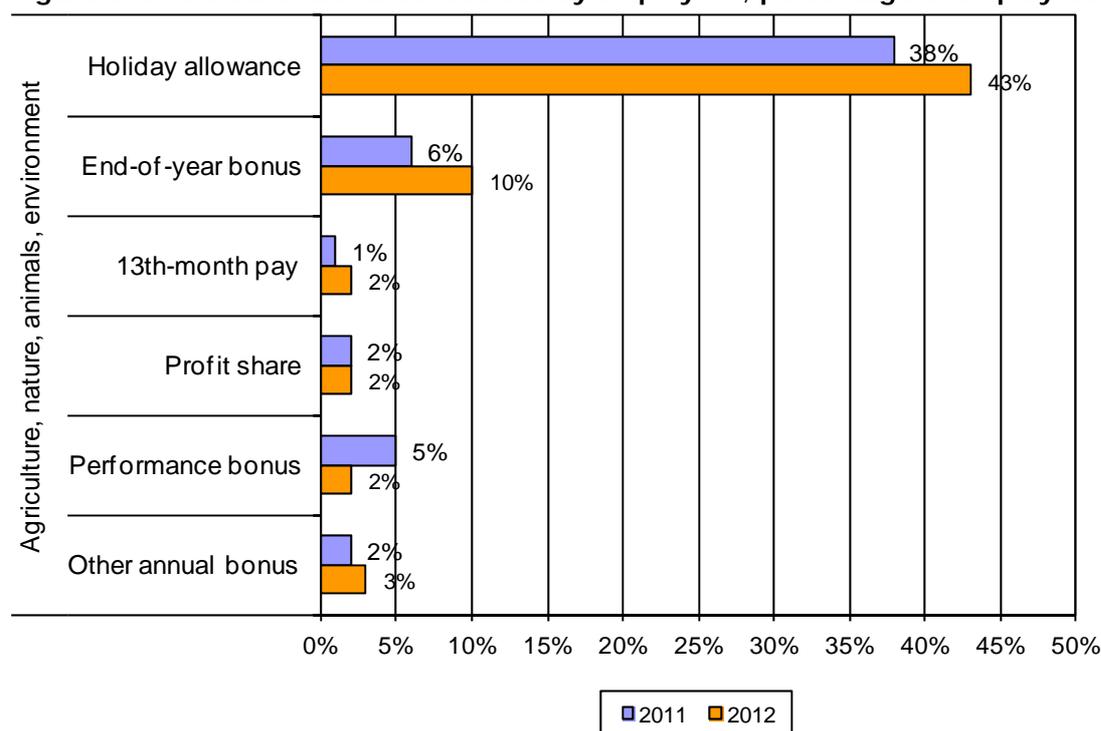


Table 4: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Skilled agricultural, fishery and forestry workers	13.3	11.3	-15%

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

Table 5: Working hours; percentage of employees

	Year		
	2011	2012	% change
Permanent employment contract	73%	74%	1%
Full-time working hours	80%	73%	-9%
Work shifts or irregular hours	37%	32%	-14%
Regular work on Saturdays	47%	50%	6%
Regular work on Sundays	18%	20%	11%
Regular work in the evenings	36%	35%	-3%

Figure 7: Overview of overtime compensation; percentage of employees

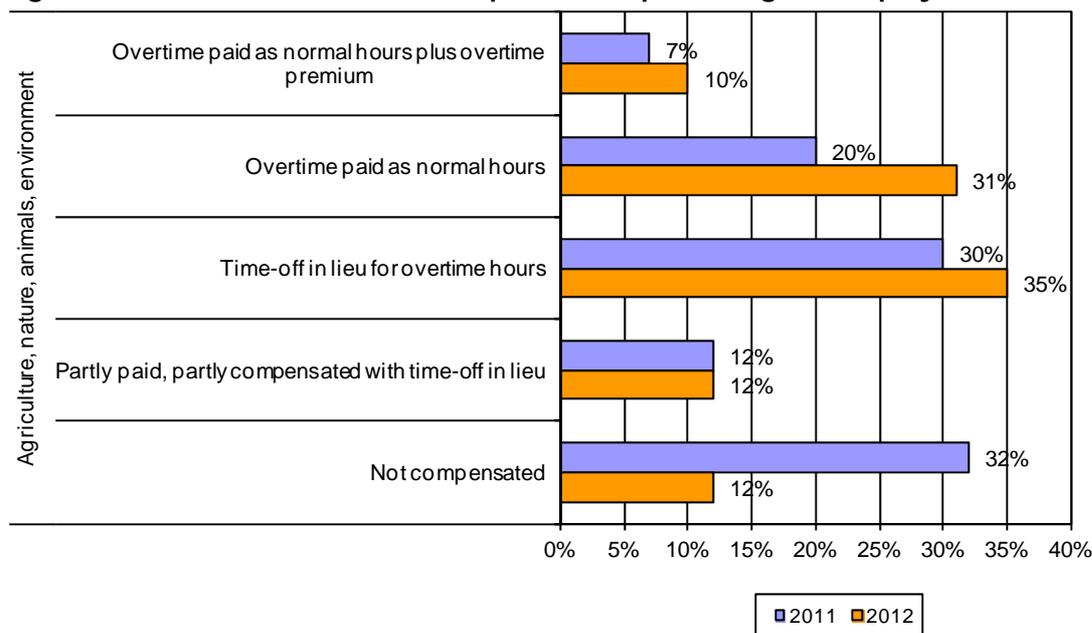


Table 6: Workers' perceptions about the past 12 months in the organization

	Year		% change
	2011	2012	
Announcement of redundancies	23%	27%	17%
Training opportunities	42%	48%	14%
Reorganisation	7%	18%	157%
New strategic initiatives	35%	39%	11%
Announcement of voluntary retirement	5%	0%	-100%
Merger with another organisation	16%	19%	19%
Renewal of computer equipment	41%	51%	24%
Competent management strategy	38%	42%	11%

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

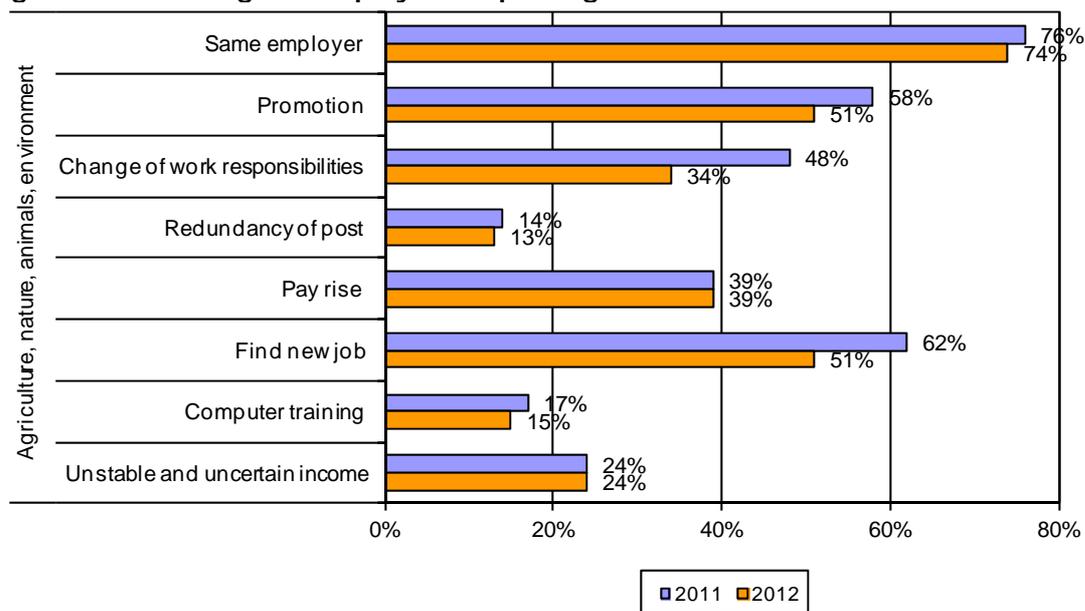


Table 7: Percentage of employees satisfied with various aspects of work

Sector	Year		% change
	2011	2012	
Job	63%	61%	-3%
Wage	19%	23%	21%
Commuting time	72%	69%	-4%
Combination of work and family life	62%	64%	3%
Job security	60%	64%	7%
Working environment	67%	74%	10%
Working hours	61%	57%	-7%
Colleagues	75%	77%	3%
Superiors	66%	66%	0%
Employer's approach to pay	25%	35%	40%
Allowances/bonuses	29%	24%	-17%
Kind of contract	28%	42%	50%

Table 8: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	90%	85%
Annual % change		-6%

1.2 Construction, fittings, housing

Wages in construction were pretty stable throughout 2012, hourly wage was 15€ signifying a 1.4% increase over the revisited 2011 average. Employers remained reluctant to pay bonuses, even the holiday bonus was reported by a lower share of respondents than in the other sectors (only 36% of respondents reported it). (See Table 9 and Figure 9).

The gender pay gap in the industry remained relatively low (-3%, down from -5% in 2012 report)) for clerical workers in 2012. Nevertheless it reached a significant -16% (up from -10%) for technical workers (See Table 10 and Table 10 in the 2012 WageIndicator report).

Working time arrangements remained stable as well, with clear dominance of permanent (74%) and full-time (90%) contracts. Employers felt less need for extra work from their employees, as evidenced by year-to-year decrease of evening and Saturday work by 7 and 5 percentage points respectively and a shift to compensation by extra time-off for overtime work, which was reported by 27% of the respondents, replacing the overtime paid as normal hours as the most widespread approach to overtime work compensation (See Table 11 and Figure 10).

The rate of layoffs increased sharply in 2012, with 41% of respondents reporting layoffs in their company, 14 % reporting reorganization and 6 % had colleagues who announced their retirement. These rates represent an over 50 % increase of redundancies and reorganizations and 100 % increase of retirements in comparisons with 2011. More respondents also reported new strategic initiatives and mergers as well as rated the management strategy of their firm as competent. On the other hand, investments into training opportunities for employees and computer equipment

decreased. The increased rate of redundancies has been evident in the perception of their personal future by the respondents – 17% of them now fear their post is going to get declare redundant in the next 12 months, an annual increase of 11 percentage points and 28% of Dutch workers in construction expect unstable and uncertain income in the near future (See Table 12 and Figure 11).

An overwhelming majority (87%) of Dutch workers in construction report being satisfied with life. Nevertheless the proportion of happy respondents decreased by 4% in comparison with the previous year. Respondents reacted to the increased rate of redundancies in the industry by signaling lower satisfaction with job security and commuting time, which can be perhaps a side-effect of increased scarcity of jobs forcing job-Seekers to consider positions further away from their place of residence. On the other hand, the general satisfaction with job as well as satisfaction with wage, allowances, employer’s approach to pay, and kind of contract have all increased from their 2011 levels, even though the former two remain at around 23% (See Table 13 and Table 14).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 9: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	14.8 €	15.0 €
Annual % Change		1.4%

Figure 9: Overview of bonuses received by employees; percentage of employees

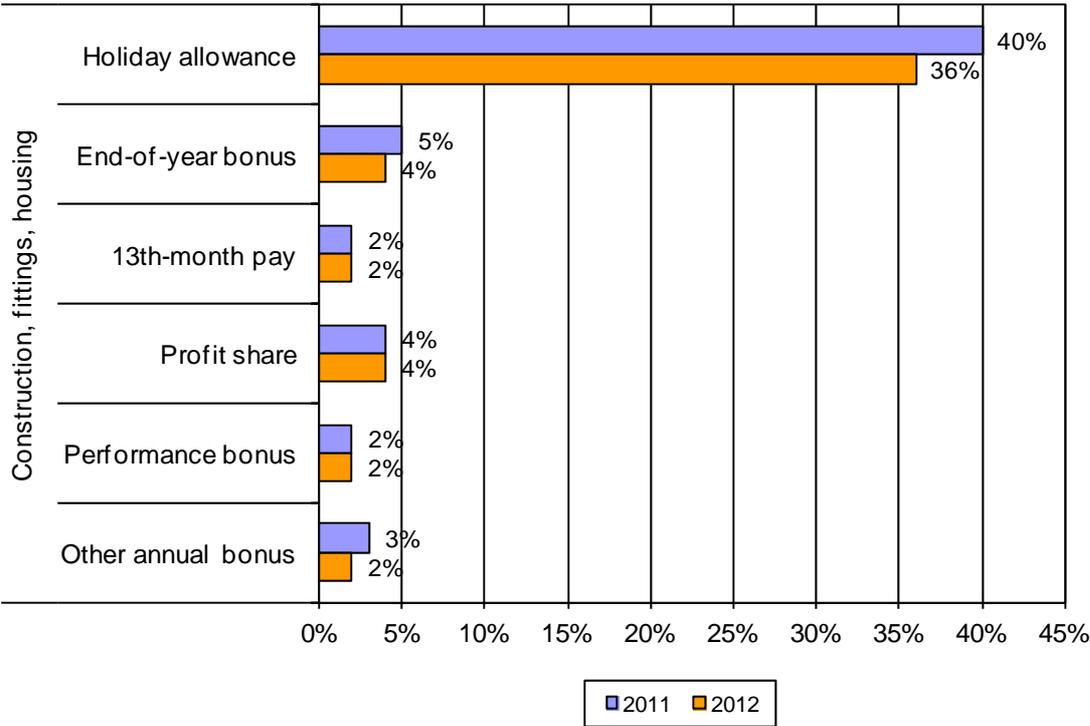


Table 10: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Technicians and associate professionals	16.9	14.3	-16%
Clerical support workers	16.7	16.2	-3%

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

Table 11: Working hours; percentage of employees

	Year		
	2011	2012	% change
Permanent employment contract	75%	74%	-1%
Full-time working hours	93%	90%	-3%
Work shifts or irregular hours	31%	30%	-3%
Regular work on Saturdays	20%	19%	-5%
Regular work on Sundays	6%	6%	0%
Regular work in the evenings	27%	25%	-7%

Figure 10: Overview of overtime compensation; percentage of employees

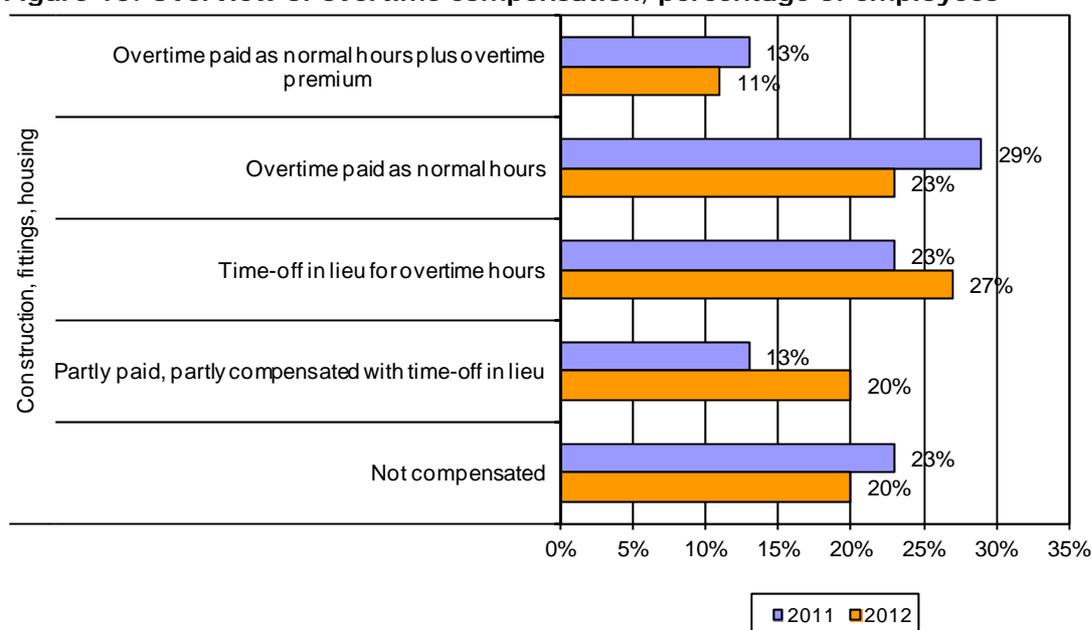


Table 12: Workers' perceptions about the past 12 months in the organization

	Year		
	2011	2012	% change
Announcement of redundancies	26%	41%	58%
Training opportunities	37%	36%	-3%
Reorganisation	9%	14%	56%
New strategic initiatives	42%	47%	12%
Announcement of voluntary retirement	3%	6%	100%
Merger with another organisation	10%	15%	50%
Renewal of computer equipment	39%	34%	-13%
Competent management strategy	33%	39%	18%

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

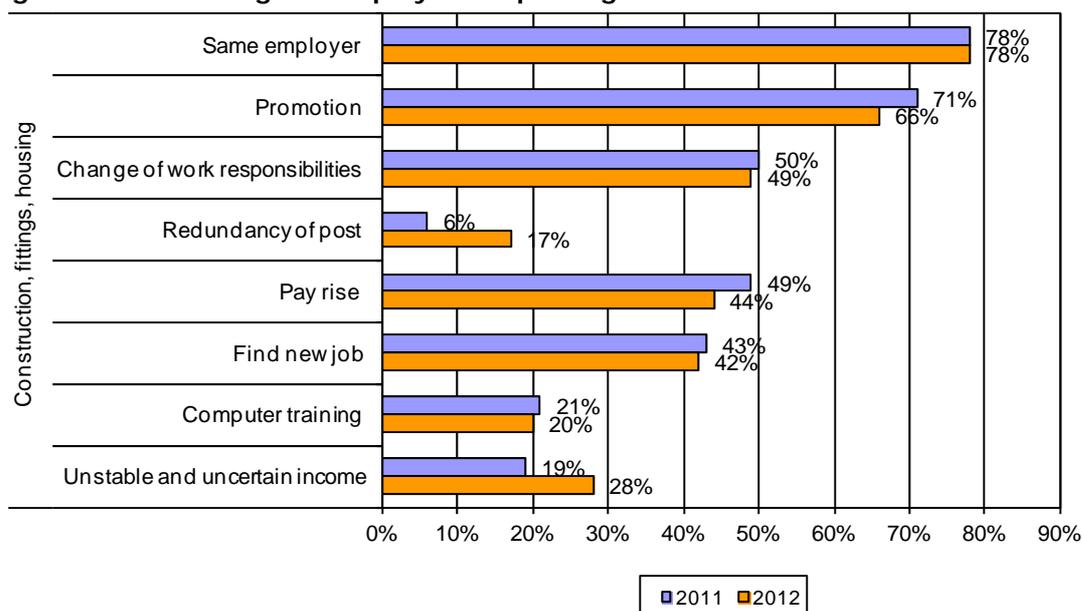


Table 13: Percentage of employees satisfied with various aspects of work

Sector	Year		% change
	2011	2012	
Job	63%	66%	5%
Wage	21%	23%	10%
Commuting time	55%	51%	-7%
Combination of work and family life	58%	58%	0%
Job security	66%	62%	-6%
Working environment	64%	63%	-2%
Working hours	62%	62%	0%
Colleagues	74%	72%	-3%
Superiors	59%	59%	0%
Employer's approach to pay	28%	36%	29%
Allowances/bonuses	21%	23%	10%
Kind of contract	41%	46%	12%

Table 14: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	91%	87%
Annual % change		-4%

1.3 Education, research, training

Median hourly wage of workers in education has decreased by 2.2 % on annual basis to 18 €. In addition to wage, workers in education benefited from end-of-year bonuses – the share of respondents reported receiving a bonus at the end of the year reached 37%. The other types of bonuses were rarely used. (See Table 15 and Figure 12).

The gender pay gap between education professionals in 2012 was -13%, similar to -12% recorded in 2012 report. (See Table 16 and Table 16 in the 2012 WageIndicator report).

The share of permanent employment contracts in education has slipped to 69 %, while the share of employees in education working full-time decreased to 59%, both representing a 3% decline compared with 2011 numbers. One out of five workers in education had to work on Saturday and the same share had to go to work on Sundays. Half of education workers reported having to regularly work in the evenings. 56% of overtime work in education was not compensated at all, a 12 percentage points increase over the situation in the previous year. Those employees who received compensation for extra work were in vast majority awarded extra time-off, being paid for overtime work was very rare (See Table 17 and Figure 13).

Redundancies continued to be strongly present in the education sector, 47% of respondents – up 18% from 2011 reported layoffs at their workplace. Reported rate of retirement also increased by 4 percentage points to 10%. More than a half of education workers reported training opportunities and new strategic initiatives being present at their workplace. Four out of five educators expect staying with the same employer for the next 12 months, about half expects a promotion and 43% see are ready to look for a new job as a real possibility in the near future. There has been an increase in redundancy fears by 4 percentage points to 16% and in the rate of expectations of unstable and uncertain income to 22% (See Table 18 and Figure 14).

90% of respondents reported being satisfied with life, 2% less than in 2011. Education workers became more satisfied with working environment (by 17%) but less satisfied with employee's approach to pay (11%). (See Table 19 and Table 20).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 15: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	18.4 €	18.0 €
Annual % Change		-2.2%

Figure 12: Overview of bonuses received by employees; percentage of employees

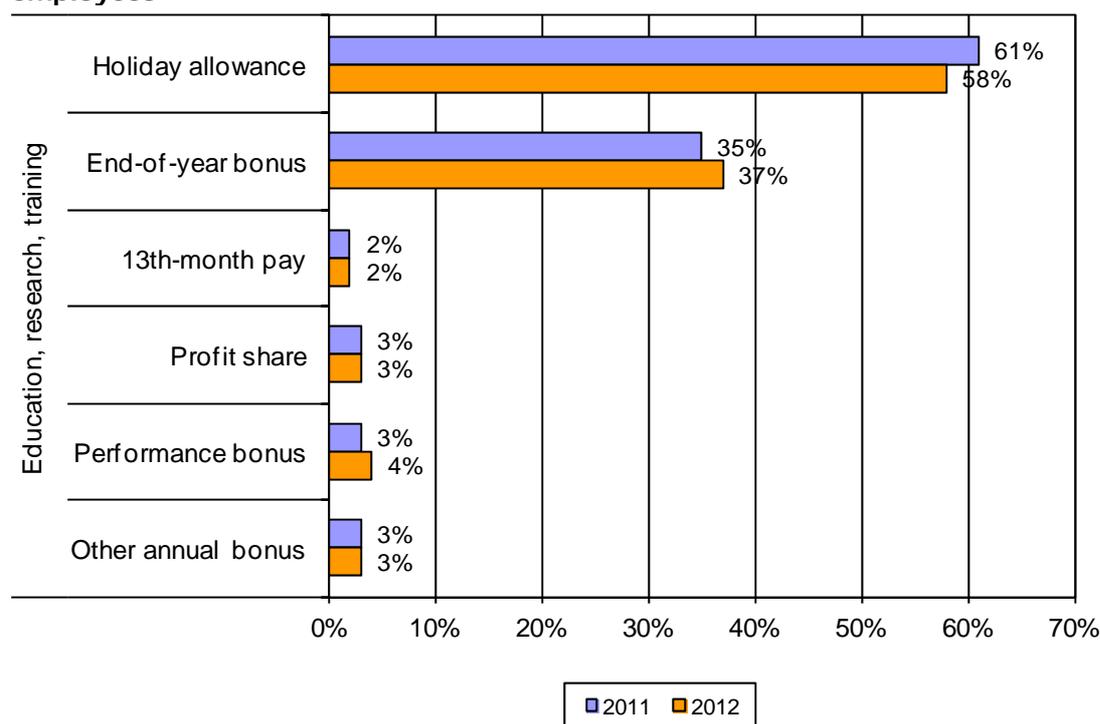


Table 16: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Professionals	21.1	18.4	-13%

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

Table 17: Working hours; percentage of employees

	Year		% change
	2011	2012	
Permanent employment contract	71%	69%	-3%
Full-time working hours	61%	59%	-3%
Work shifts or irregular hours	49%	45%	-8%
Regular work on Saturdays	23%	22%	-4%
Regular work on Sundays	19%	20%	5%
Regular work in the evenings	51%	50%	-2%

Figure 13: Overview of overtime compensation; percentage of employees

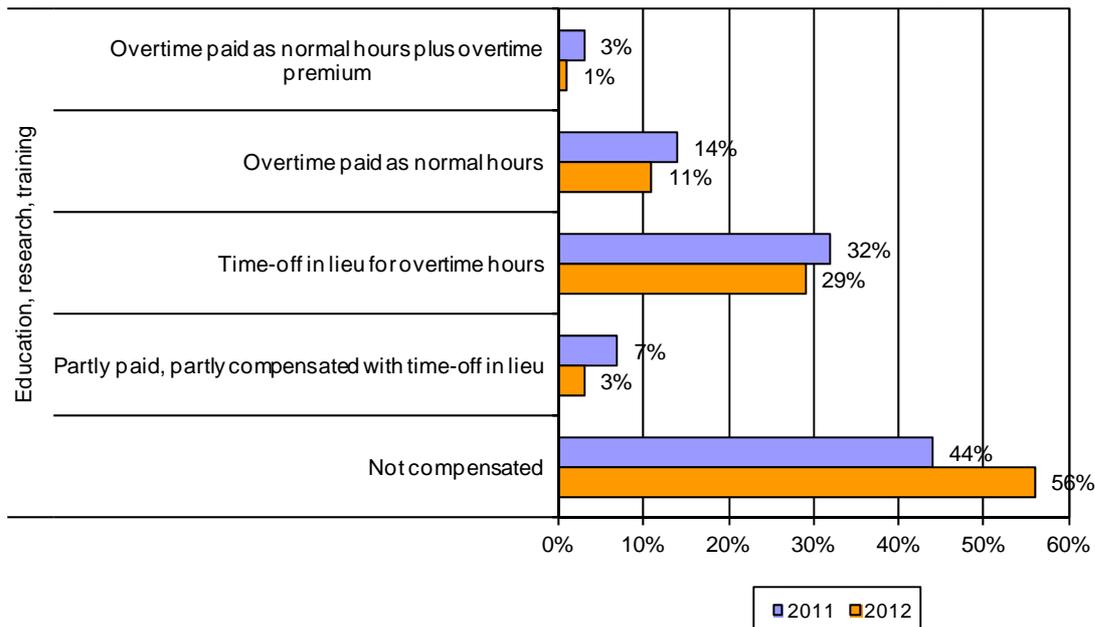


Table 18: Workers' perceptions about the past 12 months in the organization

	Year		% change
	2011	2012	
Announcement of redundancies	40%	47%	18%
Training opportunities	62%	61%	-2%
Reorganisation	22%	22%	0%
New strategic initiatives	60%	55%	-8%
Announcement of voluntary retirement	6%	10%	67%
Merger with another organisation	15%	18%	20%
Renewal of computer equipment	32%	34%	6%
Competent management strategy	35%	37%	6%

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

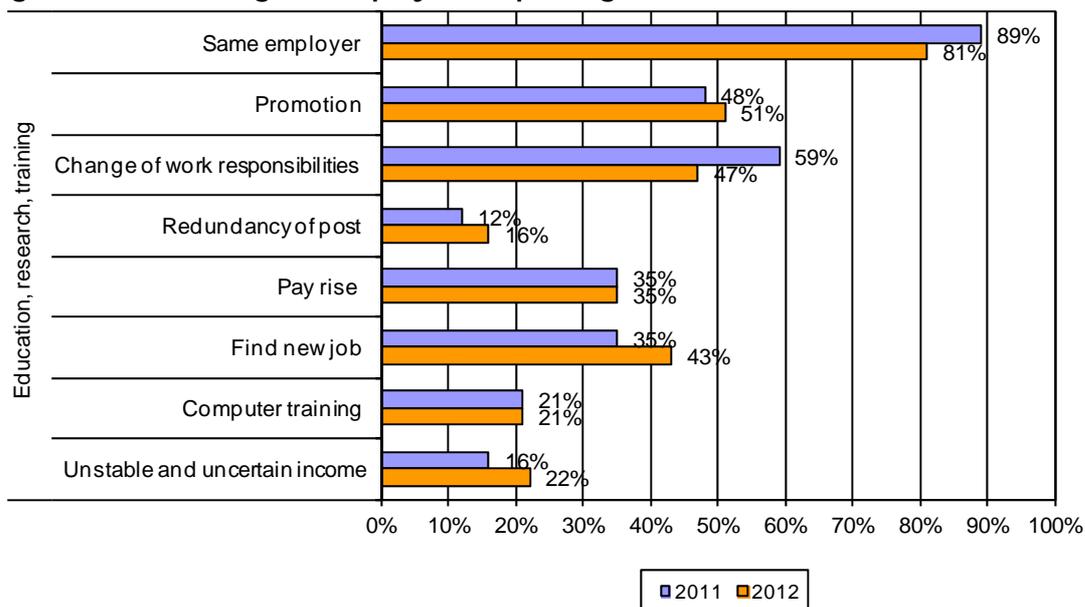


Table 19: Percentage of employees satisfied with various aspects of work

Sector	Year		% change
	2011	2012	
Job	70%	70%	0%
Wage	33%	33%	0%
Commuting time	68%	65%	-4%
Combination of work and family life	61%	63%	3%
Job security	75%	76%	1%
Working environment	59%	69%	17%
Working hours	57%	59%	4%
Colleagues	77%	79%	3%
Superiors	63%	65%	3%
Employer's approach to pay	47%	42%	-11%
Allowances/bonuses	44%	44%	0%
Kind of contract	47%	49%	4%

Table 20: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	92%	90%
Annual % change		-2%

1.4 Finance, banking, insurance

Median wages in finance in 2012 remained stable, at 16.7 € per hour. The most widespread bonus option were performance bonus and end-of-year bonus received by 17% and 15% respectively. (See Table 21 and Figure 15).

The wage pay gap in Dutch finance varies between different categories of employees. Female clerical support workers suffer from -7% (-5% in 2012 report) pay gap vis-à-vis their male colleagues, for professionals it is -13%, down from -17%. Technical and associate professional staff faces a pay gap of -17% and amongst managers it is -19% (both -18% in 2012 report). (See Table 22 and Table 2012 in the 2012 WageIndicator report).

Approximately three out of four employees in finance work under permanent contract, signalling a 6% decrease from 2011, while similar portion of employees work full-time, a figure unchanged from the previous year. 2012 saw a steep decline in the weekend and evening work in the finance industry, the former decreased by 17% and the latter by 11% in comparison with the previous year. Overtime work was usually compensated with extra time off or even not compensated at all, monetary compensation was less common (See Table 23 and Figure 16).

44% of respondents reported redundancies being announced at their workplace, a very similar portion to one determined last year. The number of employees in the financial sector reporting available training opportunities or renewal of computer equipment declined by 14% and 15% respectively. Confidence in competence of management strategy slipped by 2% to 43%. Three out of four respondents expected to remain with the same employer in 2013, even though the portion

of those who expected change of work responsibilities rose to 61%. Fears of unstable and uncertain income and position being declared redundant remained stable (See Table 24 and Figure 17).

92% of respondents expressed being satisfied with life, signalling a 2% annual decrease in this indicator. The share of those who expressed satisfaction with their employment contract decreased to 50%, while satisfaction with the wage rose by 9% (See Table 25 and Table 26).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 21: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	16.7 €	16.7 €
Annual % Change		0.0%

Figure 15: Overview of bonuses received by employees; percentage of employees

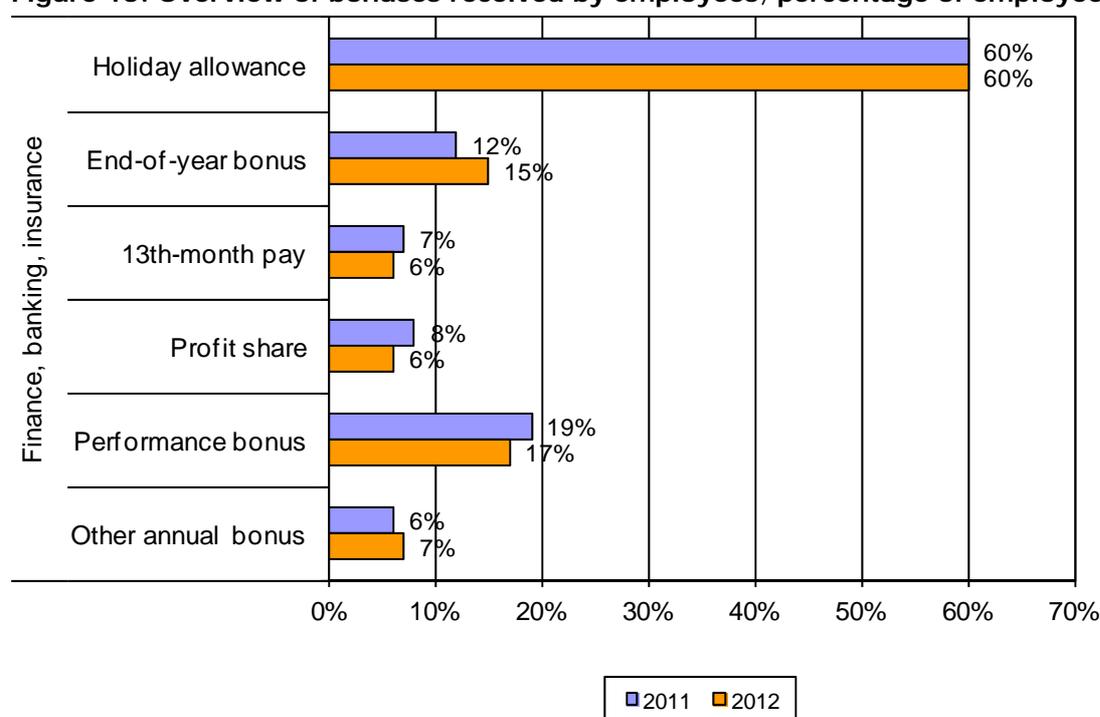


Table 22: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Managers	26.7	21.7	-19%
Professionals	23.2	20.2	-13%
Technicians and associate professionals	19.4	16.2	-17%
Clerical support workers	16.2	15.0	-7%

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

Table 23: Working hours; percentage of employees

	Year		% change
	2011	2012	
Permanent employment contract	80%	75%	-6%
Full-time working hours	72%	72%	0%
Work shifts or irregular hours	32%	31%	-3%
Regular work on Saturdays	12%	10%	-17%
Regular work on Sundays	6%	5%	-17%
Regular work in the evenings	36%	32%	-11%

Figure 16: Overview of overtime compensation; percentage of employees

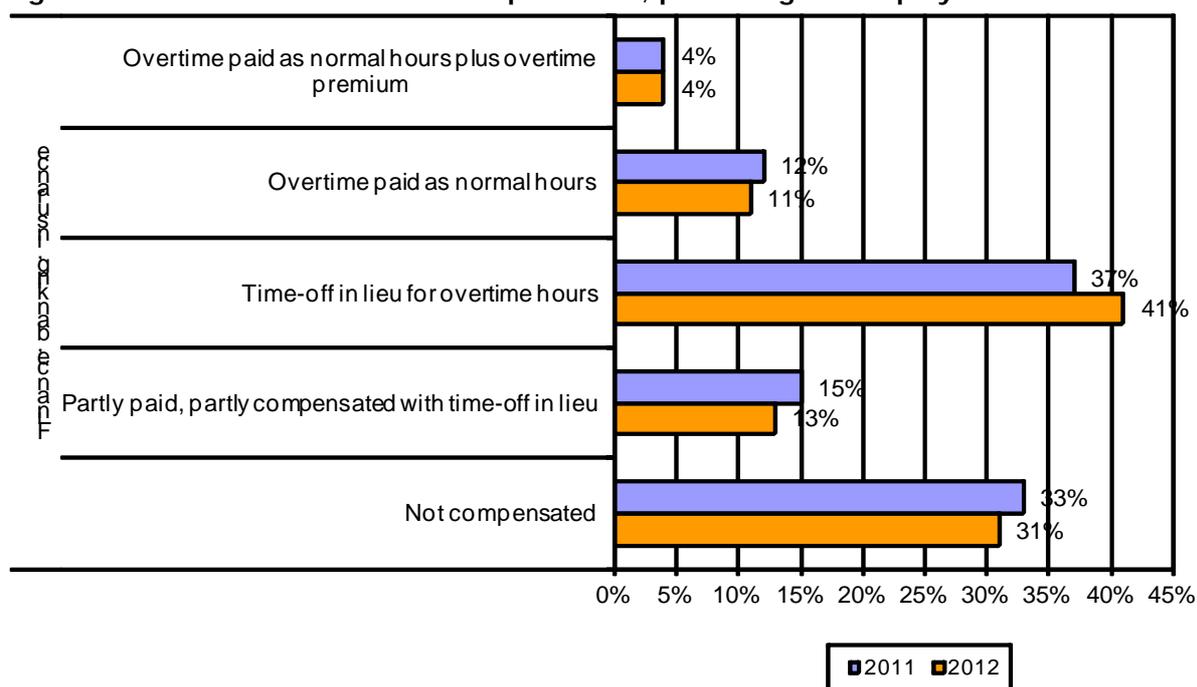


Table 24: Workers' perceptions about the past 12 months in the organization

	Year		% change
	2011	2012	
Announcement of redundancies	45%	44%	-2%
Training opportunities	65%	56%	-14%
Reorganisation	21%	23%	10%
New strategic initiatives	60%	52%	-13%
Announcement of voluntary retirement	6%	6%	0%
Merger with another organisation	20%	22%	10%
Renewal of computer equipment	40%	34%	-15%
Competent management strategy	44%	43%	-2%

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

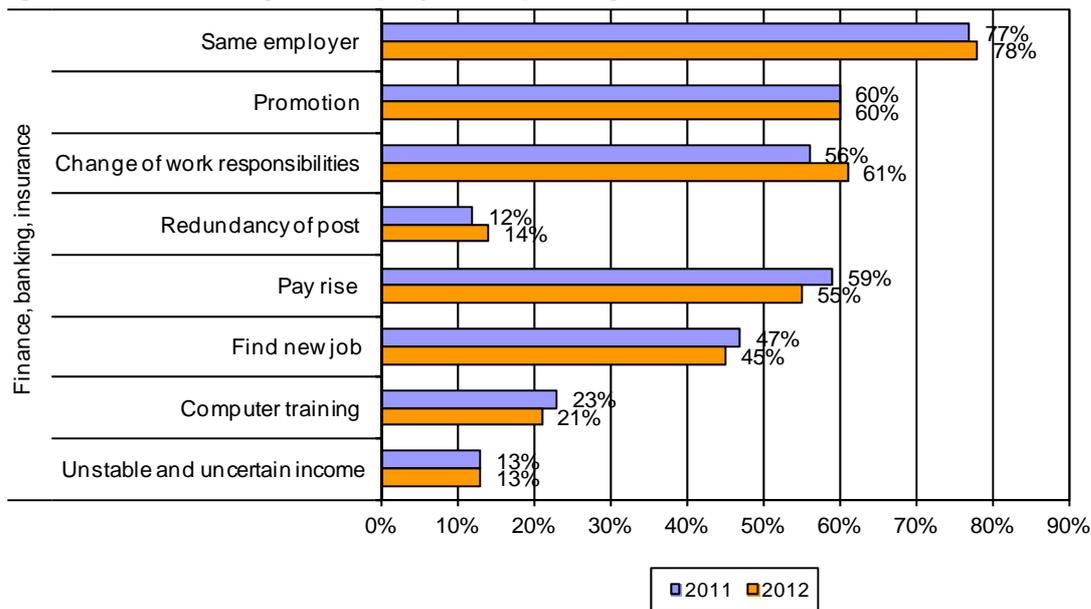


Table 25: Percentage of employees satisfied with various aspects of work

Sector	Year		% change
	2011	2012	
Job	59%	61%	3%
Wage	35%	38%	9%
Commuting time	62%	64%	3%
Combination of work and family life	62%	62%	0%
Job security	77%	79%	3%
Working environment	64%	67%	5%
Working hours	66%	65%	-2%
Colleagues	71%	73%	3%
Superiors	59%	61%	3%
Employer's approach to pay	41%	40%	-2%
Allowances/bonuses	35%	38%	9%
Kind of contract	56%	50%	-11%

Table 26: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	94%	92%
Annual % change		-2%

1.5 Health care, paramedics, laboratory

Median wage in health care remained stable at 16.9 €. In total 37 % of Dutch health care workers reported receiving an end-of-year bonus. Other bonus payments were rare. (See Table 27 and Figure 18).

Gender pay gap for both technicians and medical professionals was about -10% (-11% in 2012 report). (See Table 28 and Table 28 in the 2012 WageIndicator report).

72% of Dutch healthcare workers had permanent employment contract in 2012 and 69% worked on shifts or irregular hours, a decrease of 6% and 7% respectively. About half of healthcare workers work on Saturdays and Sundays (See Table 29 and Figure 19).

Redundancy announcements in the industry were reported to increase by 15% to 31%. Incidents of investments reported by respondents into training opportunities decreased to 57%, while renewal of computer equipment increased by 12% to 37%. Overall, the trust in competent management strategy decreased to 33%. The number of healthcare employees who expected to work for the same employer for the next 12 months decreased by 6 percentage points to 82%, while 42% of workers in this category could see a new job in their near future (See Table 30 and Figure 20).

Number of healthcare workers in the Netherlands who reported being overall satisfied with life decreased by 3% to 91%. Workers turned less satisfied in 2012 especially with the kind of contract they have – the happiness in this category decreased by 19%. Happiness with allowances and bonuses on the other hand increased by 13% (See Table 31 and Table 32).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 27: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	16.9 €	16.9 €
Annual % Change		0.0%

Figure 18: Overview of bonuses received by employees; percentage of employees

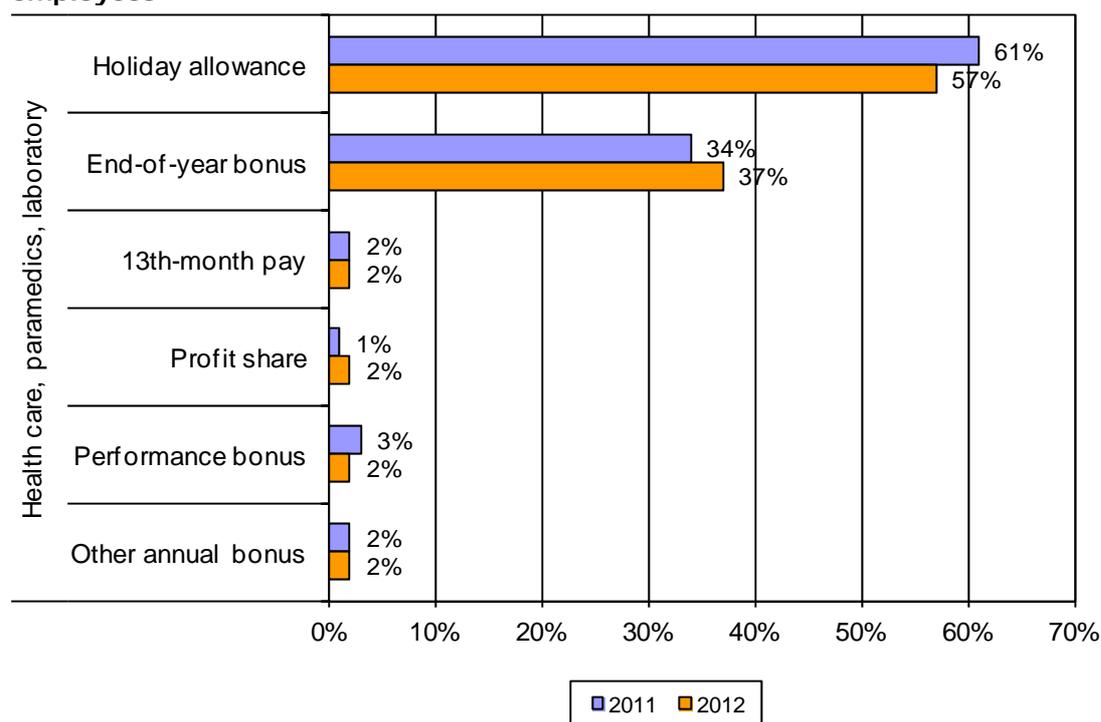


Table 28: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Professionals	20.5	18.6	-9%
Technicians and associate professionals	17.4	15.8	-10%

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

Table 29: Working hours; percentage of employees

	Year		% change
	2011	2012	
Permanent employment contract	77%	72%	-6%
Full-time working hours	45%	45%	0%
Work shifts or irregular hours	74%	69%	-7%
Regular work on Saturdays	49%	48%	-2%
Regular work on Sundays	43%	43%	0%
Regular work in the evenings	50%	50%	0%

Figure 19: Overview of overtime compensation; percentage of employees

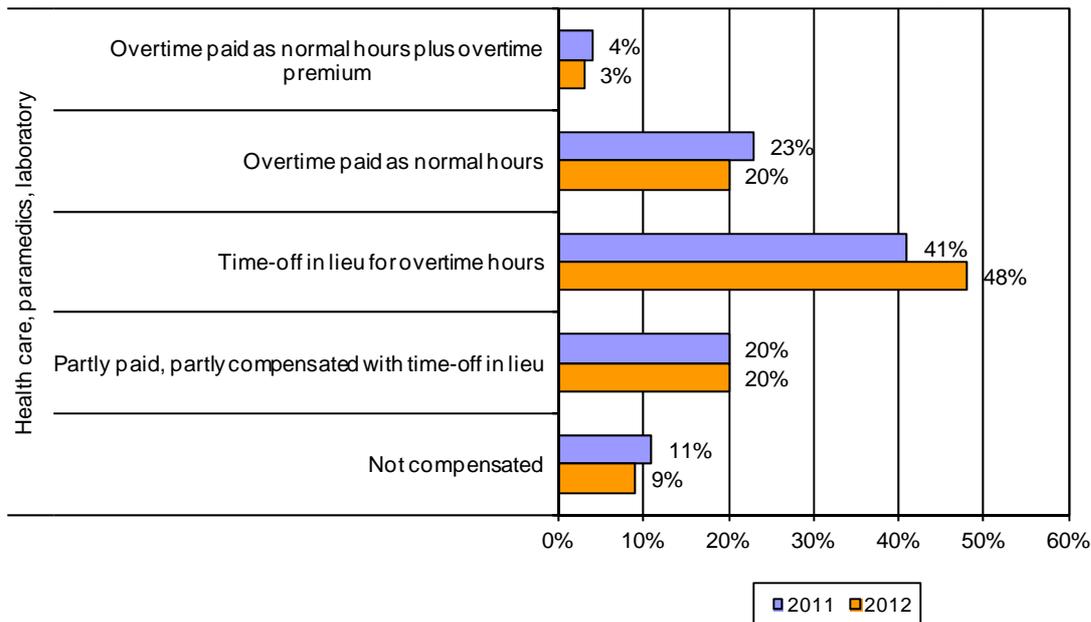


Table 30: Workers' perceptions about the past 12 months in the organization

	Year		% change
	2011	2012	
Announcement of redundancies	27%	31%	15%
Training opportunities	61%	57%	-7%
Reorganisation	18%	17%	-6%
New strategic initiatives	49%	46%	-6%
Announcement of voluntary retirement	6%	6%	0%
Merger with another organisation	22%	21%	-5%
Renewal of computer equipment	33%	37%	12%
Competent management strategy	35%	33%	-6%

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

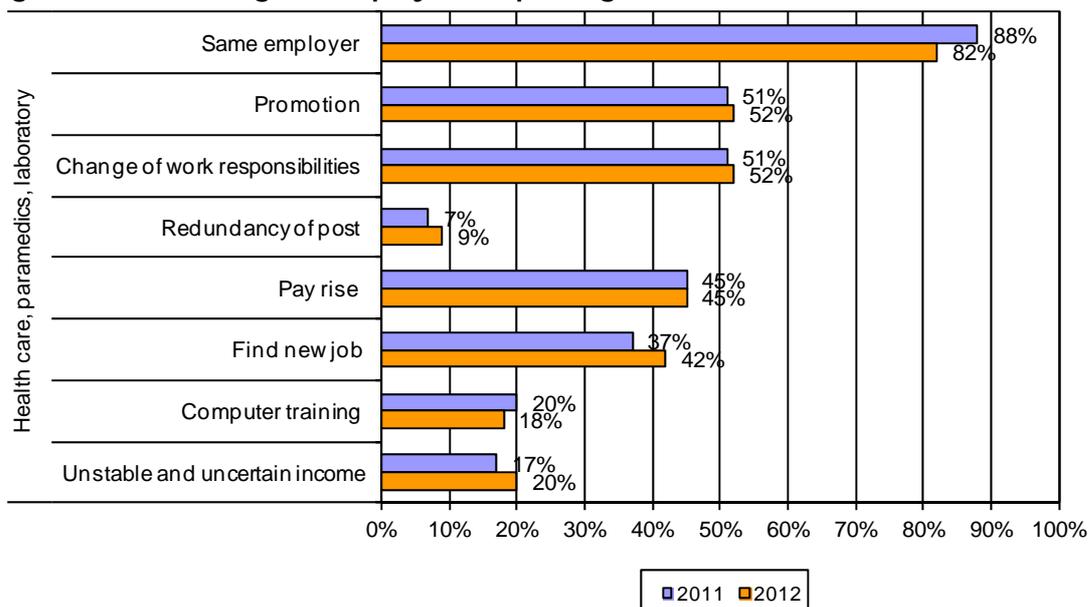


Table 31: Percentage of employees satisfied with various aspects of work

Sector	Year		% change
	2011	2012	
Job	70%	66%	-6%
Wage	30%	31%	3%
Commuting time	66%	66%	0%
Combination of work and family life	62%	61%	-2%
Job security	69%	66%	-4%
Working environment	68%	65%	-4%
Working hours	65%	63%	-3%
Colleagues	79%	76%	-4%
Superiors	65%	65%	0%
Employer's approach to pay	42%	41%	-2%
Allowances/bonuses	32%	36%	13%
Kind of contract	59%	48%	-19%

Table 32: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	94%	91%
Annual % change		-3%

1.6 Hospitality, tourism, leisure, sports

Workers in hospitality, tourism, leisure and sports had to cope with a 3.5% decrease in their wages as median wage in the industry fell to 10.9 €. About 8% of them received an end-of-year bonus. Other bonuses were used much more rarely (See Table 33 and Figure 21).

The gender pay gap in the industry very much depends on the employment segment. The pay of service and sales workers is almost equal for both genders, (wage gap of 1% was 2% in 2012 report). Meanwhile, in other segments there is a difference of between 8%-9%. In case of technicians and associate professionals as well as clerical support workers, the difference favours men, while it is the female managers who earn more than their male counterparts. In 2012 report the female managers earned 6% more than men, technicians 17% less and clerks 3% less. High level of instability of this indicator raises questions about its representativeness for this particular sector, possibly due to the nature of the industry, which is characterized by widespread temporary and part time work arrangements. (See Table 34 and Table 34 in the 2012 Wage Index report).

Half of workers in the sector had permanent contracts (down 11% from 2011) 61% worked full time. Working on shifts or irregular hours is very prevalent in the industry; shift work was as reported by four out of five of our surveyed employees. In addition, workers in hospitality, tourism, leisure and sports often work on Saturdays (78%), Sundays (67%) and evenings (78%). In comparison with 2011, the prevalence of permanent contracts in the industry declined by 11% to 50%. Overtimes were typically – in 52% of the cases - compensated with time-off, followed by overtime being paid as normal hours (23%) (See Table 35 and Figure 22).

Confidence in competent strategy of the management in the industry plummeted to 17% from 33% in 2011 – a 48% decrease. This development might be connected with 21% over year decrease of reported new strategic initiatives. More companies were reported to invest in both training opportunities (30%) and renewal of computer equipment (22%). As for the future more people (62%) sees themselves being in a market for a new job than staying with the same employer (57%). Two out of three workers see themselves being promoted, while little over a third fears unstable and uncertain income (See Table 36 and Figure 23).

Satisfaction of workers in the sector with life dipped by 2% to 85%. Satisfaction with wage decreased from already low 21% further down to 17%. Dutch tourism and leisure workers were also less satisfied with their contracts type. On the other hand, satisfaction with bonuses and allowances increased to 21% up to 17% (See Table 37 and Table 38).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 33: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	11.3 €	10.9 €
Annual % Change		-3.5%

Figure 21: Overview of bonuses received by employees; percentage of employees

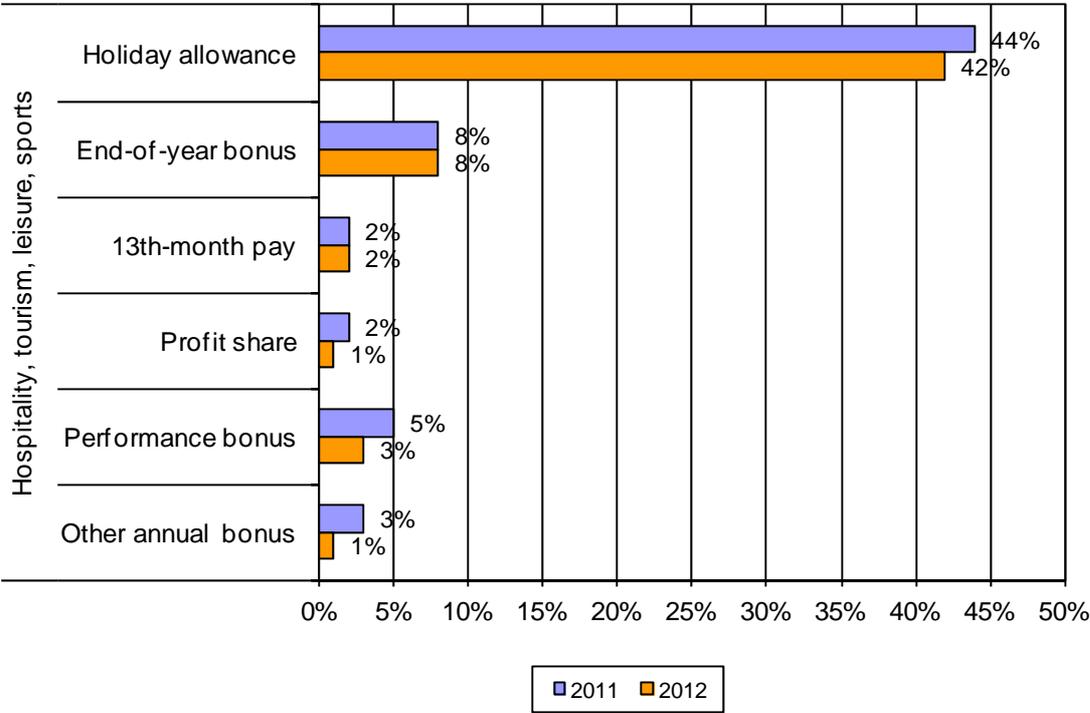


Table 34: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Managers	13.6	14.7	8%
Technicians and associate professionals	13.7	12.6	-8%
Clerical support workers	12.0	10.9	-9%
Service and sales workers	10.4	10.5	1%

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

Table 35: Working hours; percentage of employees

	Year		
	2011	2012	% change
Permanent employment contract	56%	50%	-11%
Full-time working hours	61%	61%	0%
Work shifts or irregular hours	84%	82%	-2%
Regular work on Saturdays	79%	78%	-1%
Regular work on Sundays	68%	67%	-1%
Regular work in the evenings	74%	78%	5%

Figure 22: Overview of overtime compensation; percentage of employees

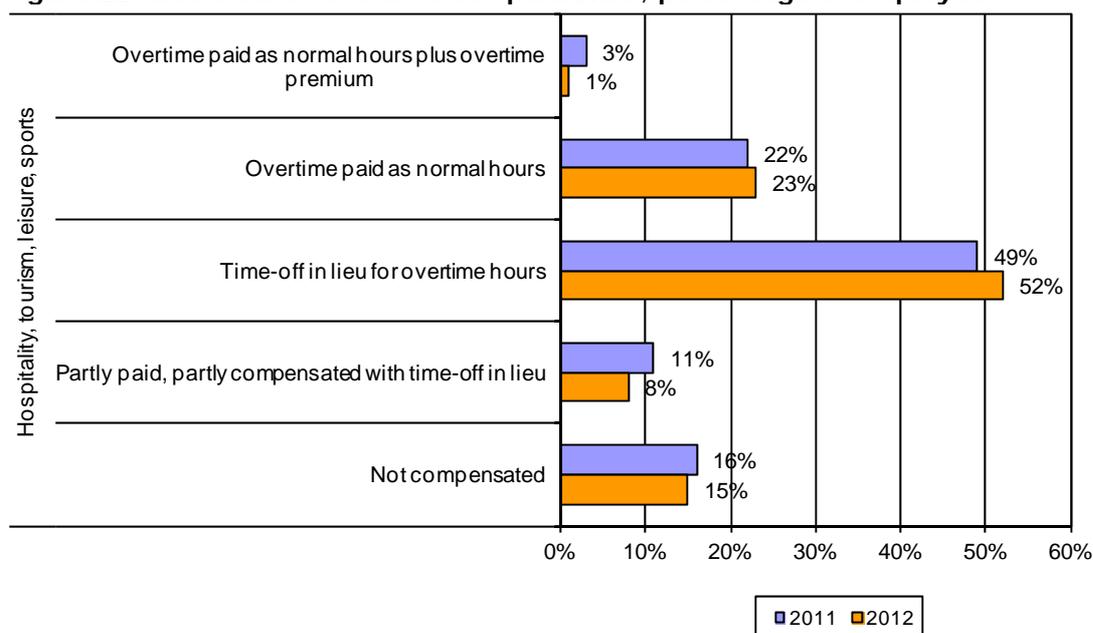


Table 36: Workers' perceptions about the past 12 months in the organization

	Year		
	2011	2012	% change
Announcement of redundancies	31%	35%	13%
Training opportunities	24%	30%	25%
Reorganisation	14%	12%	-14%
New strategic initiatives	38%	30%	-21%
Announcement of voluntary retirement	2%	2%	0%
Merger with another organisation	7%	7%	0%
Renewal of computer equipment	16%	22%	38%
Competent management strategy	33%	17%	-48%

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

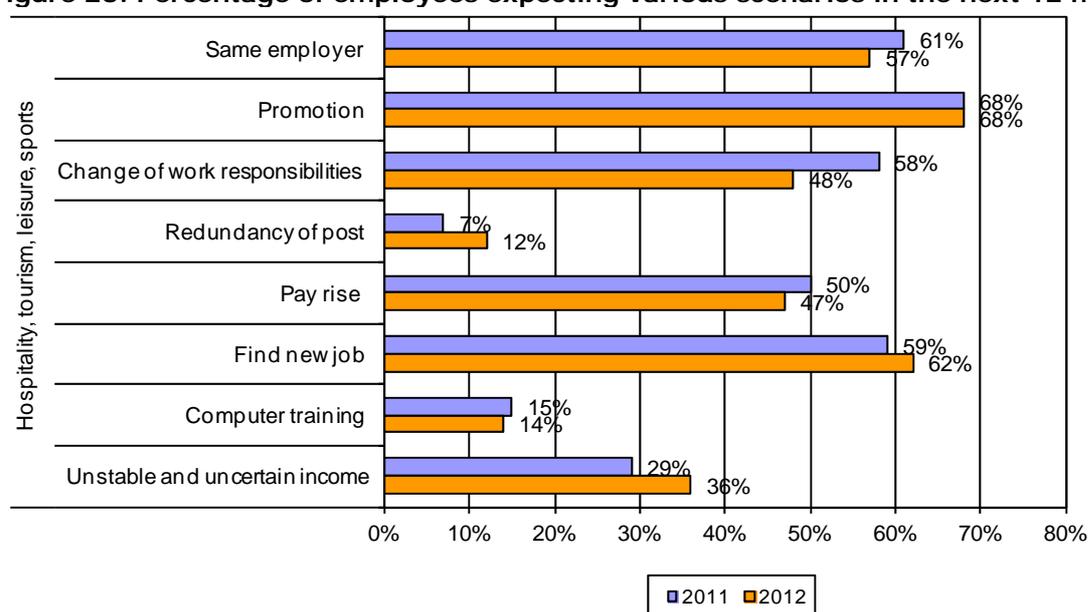


Table 37: Percentage of employees satisfied with various aspects of work

Sector	Year		
	2011	2012	% change
Job	57%	55%	-4%
Wage	21%	17%	-19%
Commuting time	67%	67%	0%
Combination of work and family life	46%	45%	-2%
Job security	66%	62%	-6%
Working environment	65%	63%	-3%
Working hours	48%	49%	2%
Colleagues	77%	73%	-5%
Superiors	59%	59%	0%
Employer's approach to pay	32%	30%	-6%
Allowances/bonuses	17%	21%	24%
Kind of contract	39%	33%	-15%

Table 38: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	87%	85%
Annual % change		-2%

1.7 Industrial production, manufacture, metal

Median wage of employees in Dutch industrial production fell by 2.6 percent over year to 15.2€ per hour. 11% of surveyed benefited from profit share, 9% from end of the year bonus and 8% from performance bonus. These figures remained stable in comparison with 2011 (See Table 39 and Figure 24).

Major gender pay gaps were reported by the respondents especially among plant and machine operators, and assemblers, where women are disadvantaged by 26% (by 22% in 2012 report) and technicians and associate professionals, where the pay gap reached -21% (up from -8% measured in 2012 report). Additional increase of the gap was detected among craft and related trades workers from -2.5% to -12%. Only amongst clerical support workers, the gap remained constant at -12%. The increase of gap between genders in technical field is indeed quite dramatic. The main reason behind it is a sharp decrease of median wages of female industrial technicians from 16.5 € to 14.5 € per hour. Reason behind this development provides an interesting puzzle for more in-depth analysis, especially if the trend remains pervasive. (See Table 40 and table 40 in the 2012 WageIndicator report).

Prevalence of permanent employment contracts in the industry dropped slightly to 78%. 90% of workers in manufacturing and industrial production worked on full-time contracts. Working on shifts or irregular hours, Saturdays, Sundays and evenings all became less common in comparison with 2011, in particular working over Weekend which was reported by 12% (Saturday) and 15% (Sunday) less respondents than in the previous years. Compensation for overtime work remained very diverse, 27% of employees offered a combination of extra time off and partial payments, 22% paid normal wage plus premium, 20% compensated their employees in the same way as for regular hours work and 18% offered just extra time-off (See Table 41 and Figure 25).

More than a third of the respondents reported redundancies taking place at their workplace. Prevalence of reorganizations increased by 64% to 18%. 43% of respondents noted their firms invested in training opportunities for their employees, a 10% increase from 2011, and 49% invested in renewal of computer equipments. Satisfaction with competence of management strategy reached 38%. The share of workers in the industry who expected to stay with the same employer in the next 12 months decreased by 7 percentage points to 81%. One out of four workers in industrial production and manufacturing fears unstable and uncertain income in the near future signalling an over year increase of 8 percentage points (See Table 42 and Figure 26).

Satisfaction of life among employees in the sector has dipped to 86% down from 89% last year. Nevertheless satisfaction with particular aspects of work remained mostly stable and even increased in terms of satisfaction with the kind of contract governing one's employment (by 21%) and employer's approach to pay (by 29%) (See Table 43 and Table 44).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 39: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	15.6 €	15.2 €
Annual % Change		-2.6%

Figure 24: Overview of bonuses received by employees; percentage of employees

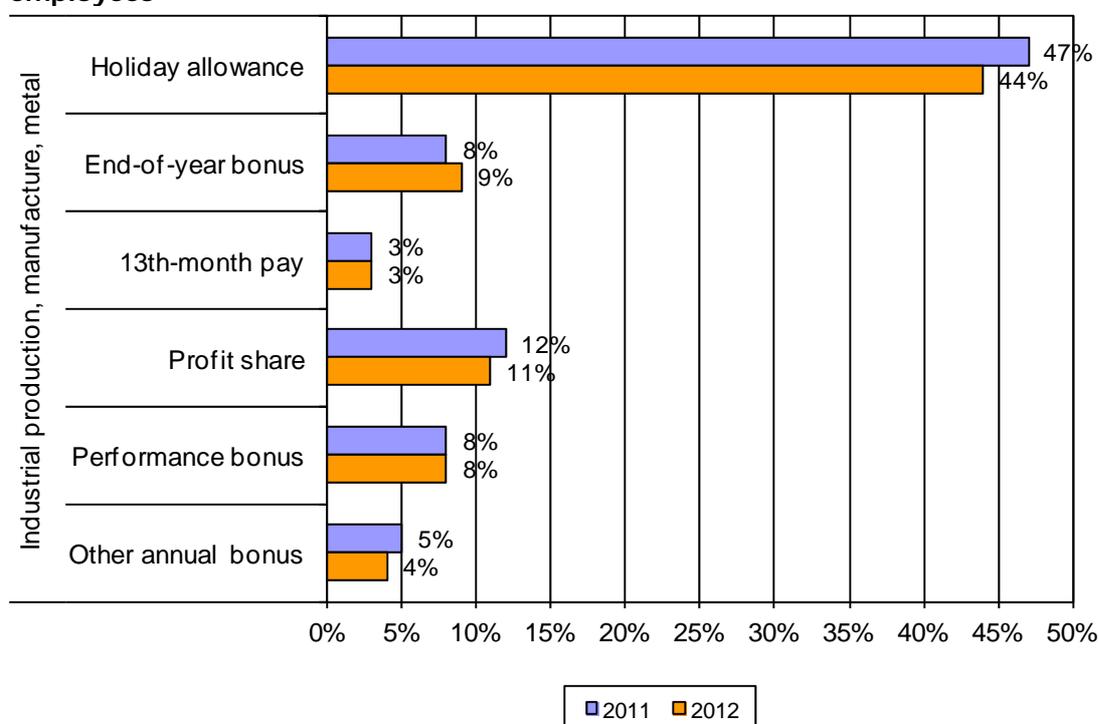


Table 40: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Technicians and associate professionals	18.4	14.5	-21%
Clerical support workers	16.7	14.7	-12%
Craft and related trades workers	14.8	13.5	-8.6%
Plant and machine operators, and assemblers	14.6	10.8	-26%

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

Table 41: Working hours; percentage of employees

	Year		% change
	2011	2012	
Permanent employment contract	81%	78%	-4%
Full-time working hours	89%	90%	1%
Work shifts or irregular hours	50%	48%	-4%
Regular work on Saturdays	33%	29%	-12%
Regular work on Sundays	20%	17%	-15%
Regular work in the evenings	43%	41%	-5%

Figure 25: Overview of overtime compensation; percentage of employees

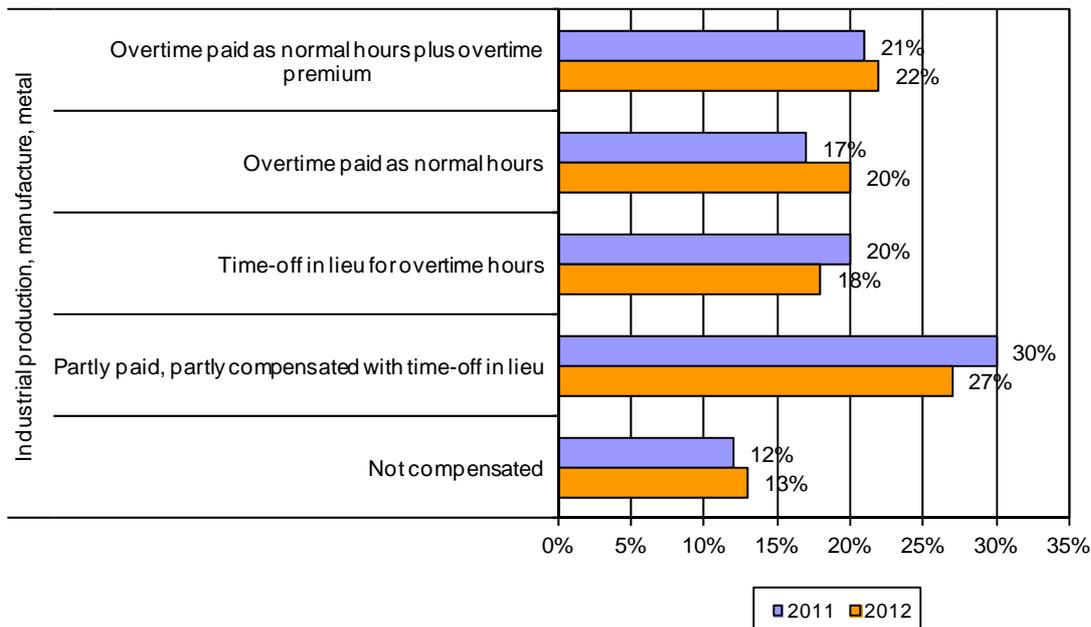


Table 42: Workers' perceptions about the past 12 months in the organization

	Year		% change
	2011	2012	
Announcement of redundancies	25%	35%	40%
Training opportunities	39%	43%	10%
Reorganisation	11%	18%	64%
New strategic initiatives	51%	52%	2%
Announcement of voluntary retirement	6%	5%	-17%
Merger with another organisation	15%	15%	0%
Renewal of computer equipment	49%	49%	0%
Competent management strategy	37%	38%	3%

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

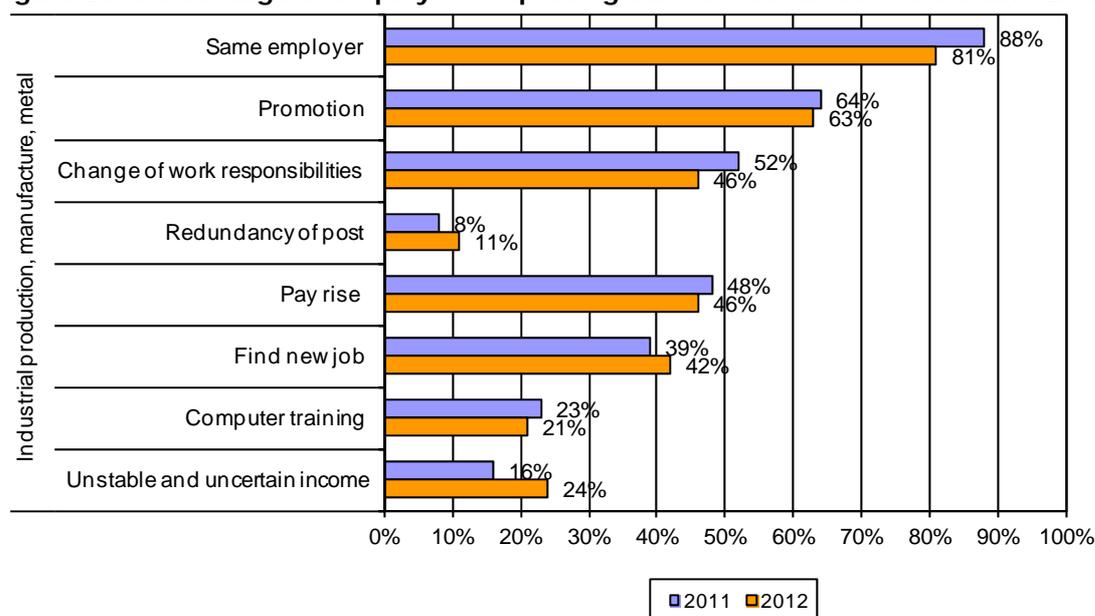


Table 43: Percentage of employees satisfied with various aspects of work

Sector	Year		% change
	2011	2012	
Job	59%	60%	2%
Wage	25%	26%	4%
Commuting time	65%	63%	-3%
Combination of work and family life	60%	59%	-2%
Job security	61%	59%	-3%
Working environment	55%	56%	2%
Working hours	58%	63%	9%
Colleagues	70%	75%	7%
Superiors	56%	59%	5%
Employer's approach to pay	24%	31%	29%
Allowances/bonuses	29%	30%	3%
Kind of contract	47%	57%	21%

Table 44: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	89%	86%
Annual % change		-3%

1.8 IT, automation, telecommunication

Median salary in the IT, automation and telecommunication sector remained unchanged from the last year at 17.6 € per hour. Performance bonus became more common; 18% of respondents reported receiving it up from 16% in 2011. Other relatively common bonuses include end-of-year bonus and profit sharing, received by 8% of respondents (See Table 45 and Figure 27).

From the analysis of wages in the IT and communications sector, it has been determined that there is a pay gap of -8% (up from -4% in 2012 report) among professionals and -9% (-8% in 2012 report) among technicians and associate professionals, disfavoured female workers. Clerical support workers, on the other hand are in a different situation with a 2% pay gap to the advantage of women (in the 2012 report 2% gap was measured in advantage of men) (See Table 46 and Table 46 in the 2012 WageIndicator report).

Just like in 2011, 81% of employers in the IT field worker under permanent work contracts. The share of full-time working hours was also stable at app. 88%. In comparison with the previous year that was a major increase of prevalence of weekend work - by 31% on Saturdays and by 63% on Sundays. Extra work was most commonly compensated with time off in lieu for overtime hours (38%) or not compensated at all (30%) (See Table 47 and Figure 28).

IT and communications firms in the Netherlands were more prone to announcing redundancies, which were reported by 19% more people than in 2011. Investments in training opportunities for employees and new strategic initiatives decreased by 9%. Faith in competent management strategy decreased by 19%. Despite this decrease in confidence, three out of four workers in the field expected to work for the same employer for the next 12 months. Share of those employees who fear unstable and uncertain income has, however, also increased to 15% (See Table 48 and Figure 29).

91% of respondents reported being satisfied with their lives, down 1% from 2011. Compared to the previous year, workers were more satisfied with their employer's approach to pay (by 14%), but less satisfied with their contracts type (by 10%) (See Table 49 and Table 50).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 45: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	17.6 €	17.6 €
Annual % Change		0.0%

Figure 27: Overview of bonuses received by employees; percentage of employees

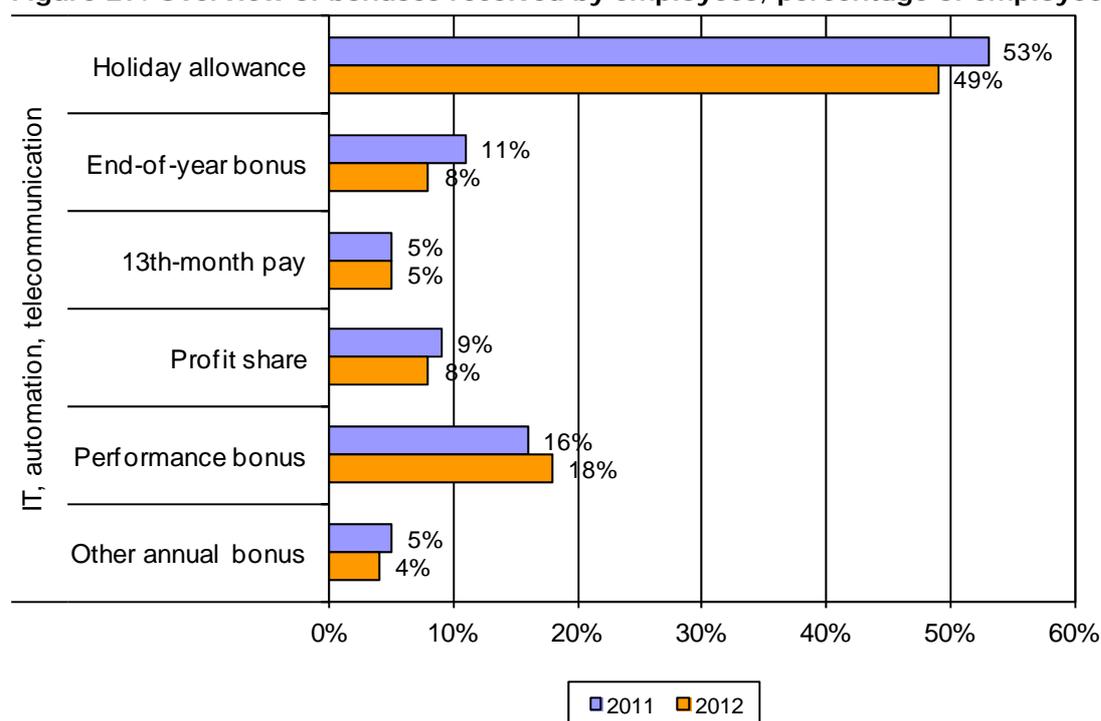


Table 46: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Professionals	19.5	17.9	-8%
Technicians and associate professionals	14.6	13.3	-9%
Clerical support workers	14.1	14.4	2%

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

Table 47: Working hours; percentage of employees

	Year		% change
	2011	2012	
Permanent employment contract	81%	81%	0%
Full-time working hours	87%	88%	1%
Work shifts or irregular hours	22%	21%	-5%
Regular work on Saturdays	13%	17%	31%
Regular work on Sundays	8%	13%	63%
Regular work in the evenings	34%	36%	6%

Figure 28: Overview of overtime compensation; percentage of employees

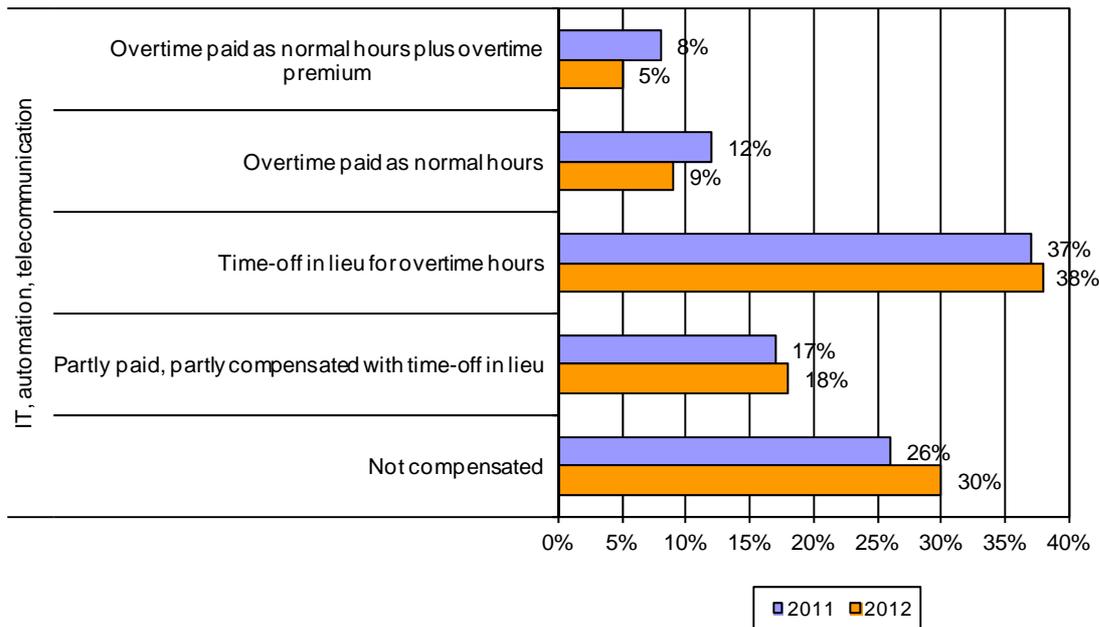


Table 48: Workers' perceptions about the past 12 months in the organization

	Year		% change
	2011	2012	
Announcement of redundancies	36%	43%	19%
Training opportunities	58%	53%	-9%
Reorganisation	19%	18%	-5%
New strategic initiatives	68%	62%	-9%
Announcement of voluntary retirement	3%	3%	0%
Merger with another organisation	23%	24%	4%
Renewal of computer equipment	49%	47%	-4%
Competent management strategy	54%	44%	-19%

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

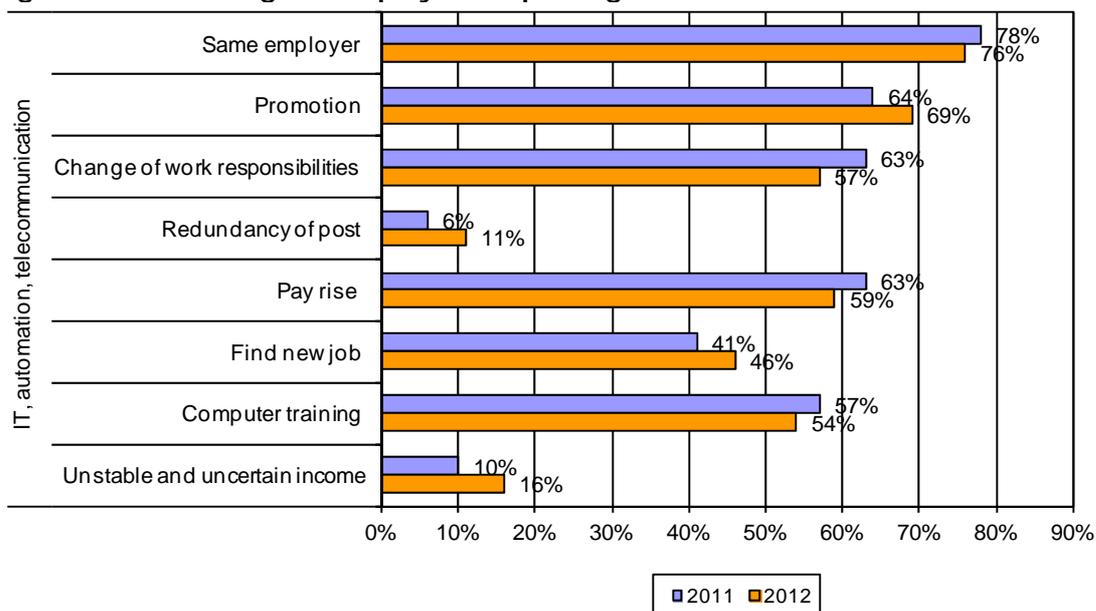


Table 49: Percentage of employees satisfied with various aspects of work

Sector	Year		% change
	2011	2012	
Job	65%	65%	0%
Wage	33%	34%	3%
Commuting time	53%	54%	2%
Combination of work and family life	59%	60%	2%
Job security	79%	79%	0%
Working environment	68%	67%	-1%
Working hours	66%	64%	-3%
Colleagues	75%	76%	1%
Superiors	66%	62%	-6%
Employer's approach to pay	37%	42%	14%
Allowances/bonuses	33%	31%	-6%
Kind of contract	50%	45%	-10%

Table 50: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	92%	91%
Annual % change		-1%

1.9 Marketing, PR, advertising

Median wage in marketing, PR and advertising was 15.6 €, 2% lower than in 2011. 12% of employees in the sector received an end-of-year bonus and 10% (down from 16% in 2011) benefited from a performance bonus (See Table 51 and Figure 30).

Female clerical support workers in the marketing, PR and advertising industry earned 8% (1% in 2012 report) more than their male counterparts. Among professionals, however, the pay gap was -3%, favouring men (-6% in 2012 report) (See Table 52 and Table 52 in the 2012 report)).

Three out of four of workers in marketing, PR and advertising work full-time – the same proportion as in 2011, while the incidence of permanent contracts dipped to 57%, a 10% over year decrease. More than a half employees in the industry doesn't receive compensation for overtime work at all, if they do they mostly provide time-off in lieu for overtime hours (36%) (See Table 53 and Figure 31).

41% of employees in the industry reported redundancies being announced at their workplace, up 24% from 2011. At the same time the number of reorganizations jumped to 21% (up 40% vis-à-vis 2011). Training opportunities and renewals of computer equipment became more scarce. Share of employees who believe they will spend the next 12 months with the same employer decreased to 58% from 64% in 2011, while those who expect to find a new job increased to 60% from 48%. More than 70% of workers in the sector expect promotion and/or change of work responsibilities. 24% fear unstable and uncertain income (See Table 54 and Figure 32).

Dutch marketing, PR and advertising workers became less satisfied with most aspects of their jobs, most notably their allowances/bonuses and kind of contract, which declined by 35% and 30% respectively. Also satisfaction with employers approach to pay fell by 13% in comparison with the last year. Satisfaction with life, however, increased by 1% to 95% (See Table 55 and Table 56).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 51: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	15.9 €	15.6 €
Annual % Change		-2%

Figure 30: Overview of bonuses received by employees; percentage of employees

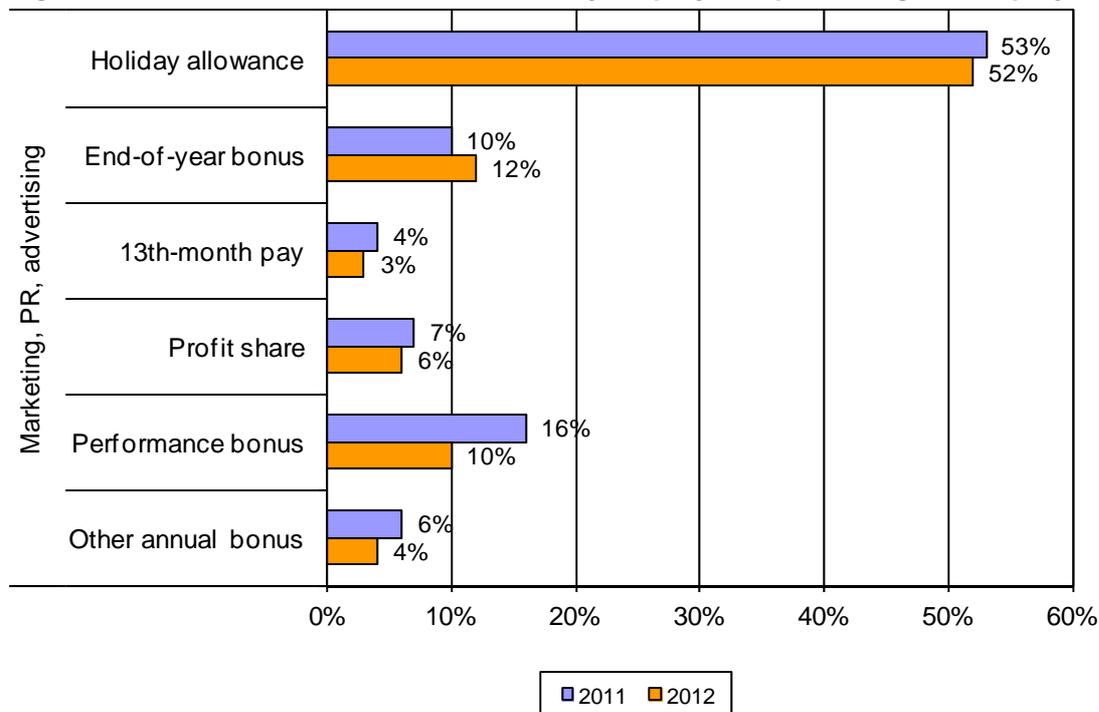


Table 52: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Professionals	17.8	17.3	-3%
Clerical support workers	12.9	13.9	8%

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

Table 53: Working hours; percentage of employees

	Year		% change
	2011	2012	
Permanent employment contract	63%	57%	-10%
Full-time working hours	76%	75%	-1%
Work shifts or irregular hours	16%	19%	19%
Regular work on Saturdays	15%	15%	0%
Regular work on Sundays	9%	11%	22%
Regular work in the evenings	35%	36%	3%

Figure 31: Overview of overtime compensation; percentage of employees

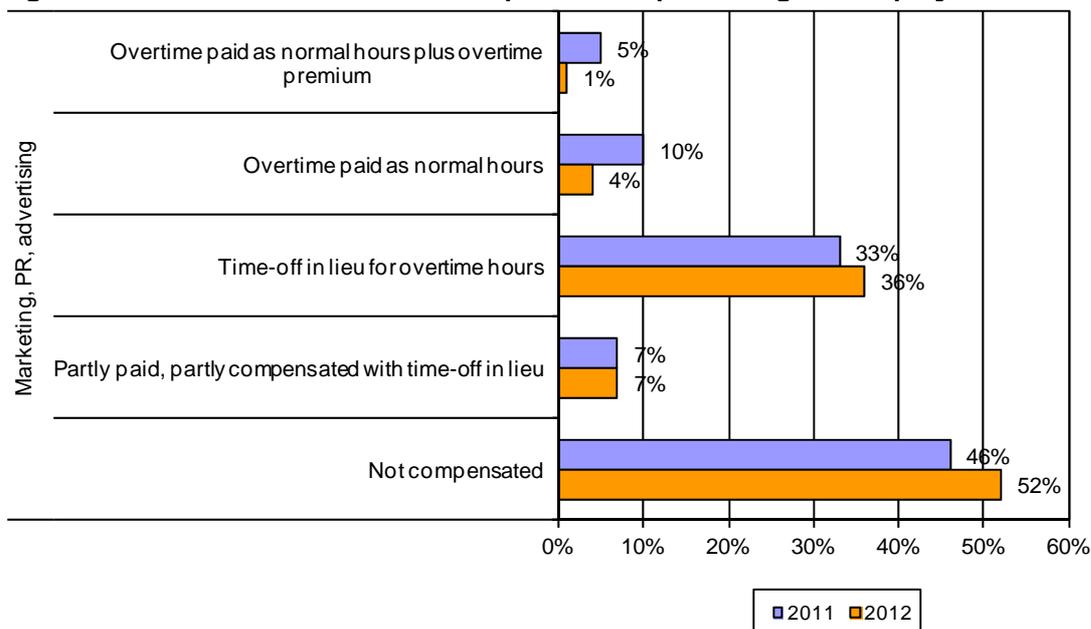


Table 54: Workers' perceptions about the past 12 months in the organization

	Year		% change
	2011	2012	
Announcement of redundancies	33%	41%	24%
Training opportunities	45%	41%	-9%
Reorganisation	15%	21%	40%
New strategic initiatives	65%	59%	-9%
Announcement of voluntary retirement	6%	4%	-33%
Merger with another organisation	19%	13%	-32%
Renewal of computer equipment	41%	36%	-12%
Competent management strategy	45%	38%	-16%

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

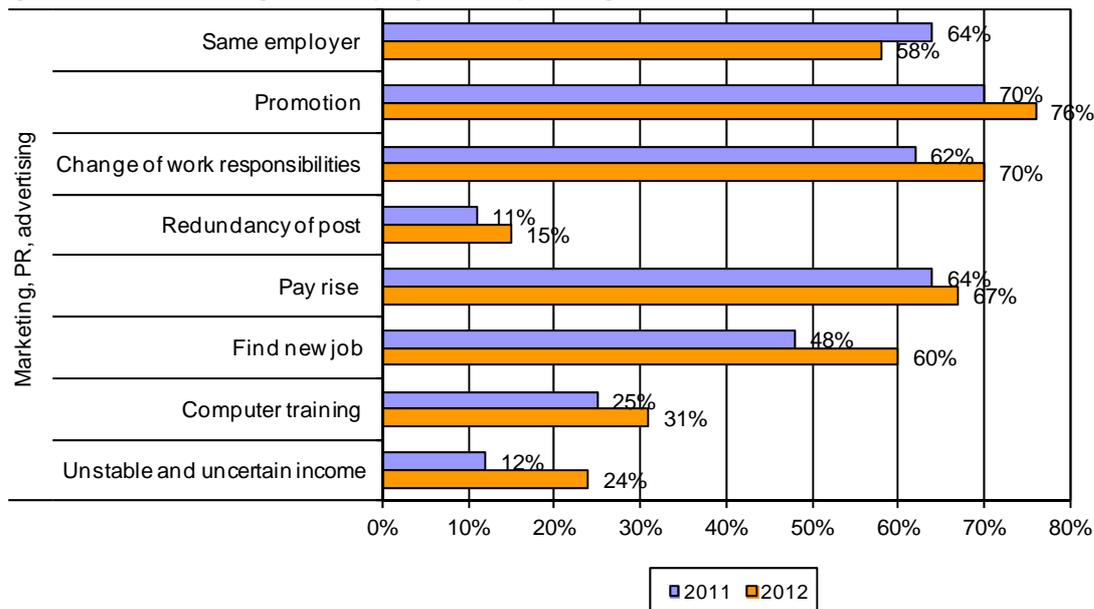


Table 55: Percentage of employees satisfied with various aspects of work

Sector	Year		
	2011	2012	% change
Job	65%	62%	-5%
Wage	32%	30%	-6%
Commuting time	64%	61%	-5%
Combination of work and family life	64%	63%	-2%
Job security	82%	85%	4%
Working environment	69%	69%	0%
Working hours	65%	67%	3%
Colleagues	76%	77%	1%
Superiors	62%	66%	6%
Employer's approach to pay	40%	35%	-13%
Allowances/bonuses	37%	24%	-35%
Kind of contract	53%	37%	-30%

Table 56: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	94%	95%
Annual % change		1%

1.10 Transport, logistics, port, airport

Median hourly wage in transport and logistics industry, which encompasses wages received by employees at ports and airports was 13.9 €, up from 13.8 € in 2011. 7% of employees received end-of-year bonus and/or performance bonus (See Table 57 and Figure 33)

Women in the industry earn less than male employees. The difference is -7% amongst clerical support workers and elementary occupations (-3% and -8% in 2012 report) and -10% amongst plant and machine operators (-9%)(See Table 58).

Three out of four workers in target and logistics have permanent employment contracts and 88% work full time. Work in the evenings and over the weekends became less common in 2012, the former decreased by 12% and the latter by 4% on Saturdays and 7% on Sundays. Overtimes were typically compensated as normal hours or through extra time off both 22%, but paying a premium for overtimes also became more widespread (up to 21% from 17% in 2011). 18% of employees who worked overtime received partial pay for overtime work and 17% did not receive any compensation at all (See Table 59 and Figure 34).

Announcements of redundancies were up in the industry by 24% in comparison with 2011. Mergers and new strategic initiatives were also reported more often by 19% and 13% respectively. Expectations for the future were very stable in 2012, similarly than in 2011 78% of workers expect to stay with the same employer, 57 % expects to be promoted, 52% Sees finding a new job likely and 31% fears unstable and uncertain income (See Table 60 and Figure 35).

Satisfaction with life of workers in the transport and logistics sector reached 88% in 2012. 1% in comparison with the previous years. In particular workers became more happy with employer's approach to pay (by 10%) and allowances/bonuses (15%) (See Table 61 and Table 62).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 57: Median gross hourly wage

	Year of the survey	
	2011	2012
Median	13.8 €	13.9 €
Annual % Change		0.7%

Figure 33: Overview of bonuses received by employees; percentage of employees

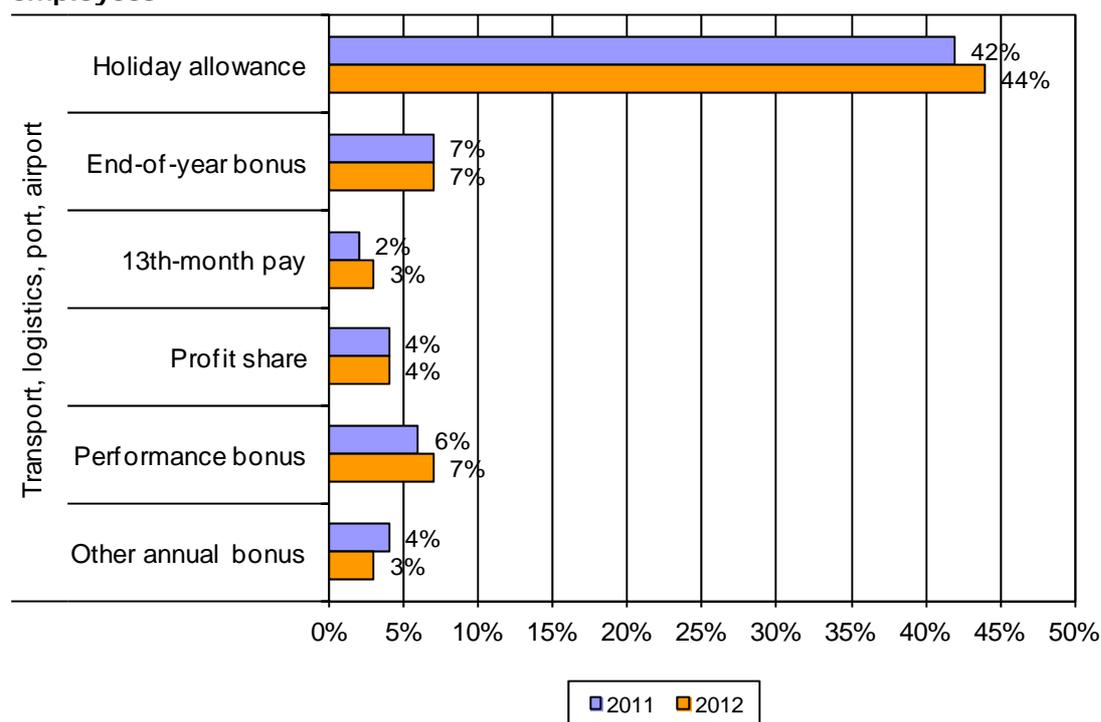


Table 58: Median gross hourly wage by subgroups; gender pay gap

	Gender		Pay gap
	Male	Female	
Clerical support workers	14.7	13.7	-7%
Plant and machine operators, and assemblers	12.8	11.6	-10%
Elementary occupations	12.0	11.2	-7%

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

Table 59: Working hours; percentage of employees

	Year		
	2011	2012	% change
Permanent employment contract	73%	74%	1%
Full-time working hours	87%	88%	1%
Work shifts or irregular hours	51%	47%	-8%
Regular work on Saturdays	45%	43%	-4%
Regular work on Sundays	29%	27%	-7%
Regular work in the evenings	57%	50%	-12%

Figure 34: Overview of overtime compensation; percentage of employees

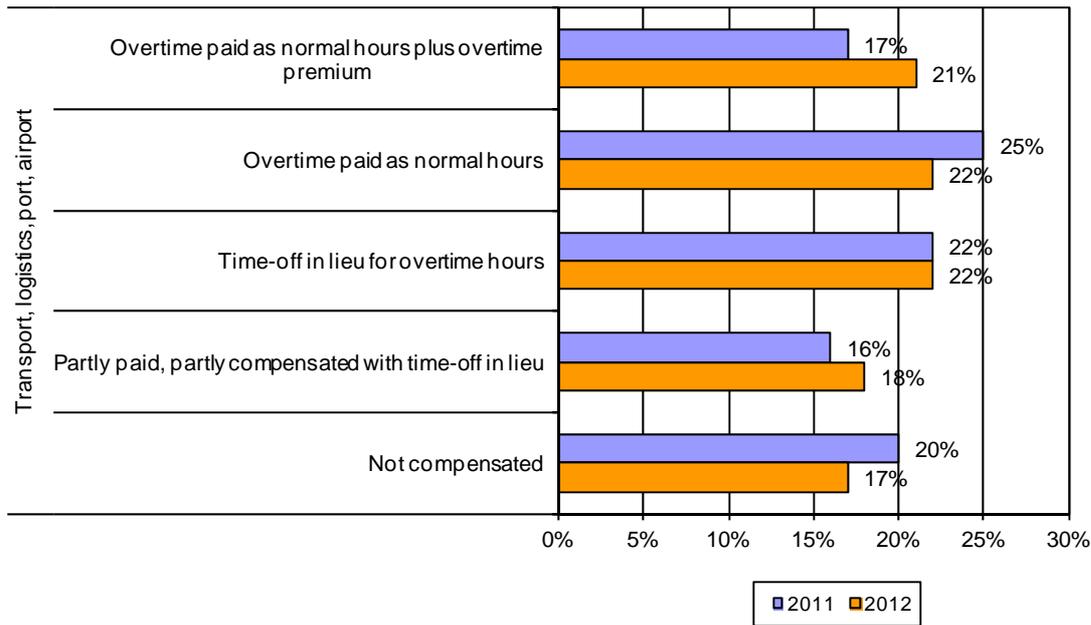


Table 60: Workers' perceptions about the past 12 months in the organization

	Year		% change
	2011	2012	
Announcement of redundancies	29%	36%	24%
Training opportunities	36%	35%	-3%
Reorganisation	18%	19%	6%
New strategic initiatives	46%	52%	13%
Announcement of voluntary retirement	5%	5%	0%
Merger with another organisation	16%	19%	19%
Renewal of computer equipment	46%	45%	-2%
Competent management strategy	37%	38%	3%

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

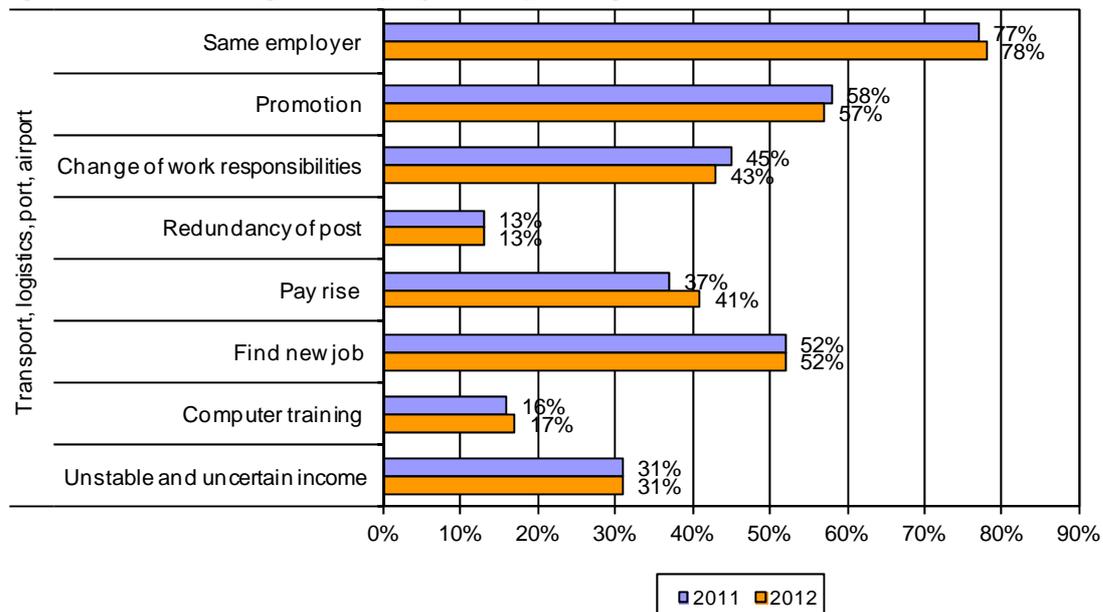


Table 61: Percentage of employees satisfied with various aspects of work

Sector	Year		% change
	2011	2012	
Job	60%	63%	5%
Wage	25%	26%	4%
Commuting time	66%	65%	-2%
Combination of work and family life	52%	52%	0%
Job security	61%	62%	2%
Working environment	57%	61%	7%
Working hours	56%	56%	0%
Colleagues	72%	73%	1%
Superiors	56%	56%	0%
Employer's approach to pay	30%	33%	10%
Allowances/bonuses	27%	31%	15%
Kind of contract	46%	44%	-4%

Table 62: Percentage of employees satisfied with life

	Quarter of the survey	
	2011	2012
% of respondents	87%	88%
Annual % change		1%

2. Main sector developments 2006 – 2012

In this chapter we focus on major trends in wages and bonuses over the period of 2006-2012 in two specific sectors⁶: 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 oscillates across years around 17€. In 2012 negligible negative change from 17€ to 16.9€ is observed (See Table 63).

As it was mentioned in the 2012 Loonwijzer – Monsterboard Wage Index report, all studied benefits significantly decreased in their incidence up to the year 2009. After 2009, percentages of employees receiving benefits change little or not at all. Incidence of end-of year bonus and 13th-month pay was reported by 4-6% of employees, percentage of employees given profit share remains stable at 7% and performance bonus is applicable to 17% - 19% of all employees (See Table 64).

Announcements of redundancies reached peak in the year 2010 when 40% of employees reported its incidence at their workplace in the past 12 months. In the year 2011 the percentage decreased to 34% but situation in 2012 (38%) returned to the levels more similar to 2010. The percentage of employees reporting training opportunities decreased by 25 percentage points from 71% in 2008 to 46% in 2012. 15% of employees reported every year since 2011, remaining far below 40% measured in 2008 (40%). Additionally, a decrease of trust in competent management strategy coverage was observed in 2012: 43% of employees reported competent management strategy in past 12 months, which is 8 percentage points less than in the year 2011 and 24 percentage points less than in the year 2008 (See Table 65).

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 63: Median gross hourly wage

	Year of the survey						
	2006	2007	2008	2009	2010	2011	2012
Median	16.4	17.4	17.8	17.1	16.5	17	16.9
% change from the previous year		6.1%	2.3%	-3.9%	-3.5%	3.0%	-0.6%

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.

Table 64: Overview of bonuses received by employees; percentage of employees

Year of the survey	Employee bonus				
	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 ⁷	46%	5%	5%	7%	18%
2011	50%	6%	4%	7%	17%
2012	48%	4%	4%	7%	19%

Table 65: Workers' perceptions about the past 12 months in the organization

Year of the survey	Past 12 months of organisations			
	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%
2012	38%	46%	15%	43%

2.2 Financial and insurance activities

In the Financial and insurance activities sector, the median gross hourly wage increased from 15.6€ in 2006 to 18.7€ in 2011. However growing trend was not confirmed in the year 2012 when the median value decreased by 7.5% to 17.3€ (See Table 66).

. The incidence of 13th-month pay has remained stable at 7% since 2010. Also end-of-year bonus and performance bonus shows relatively stable result after year 2009, i.e. 14%-16% employees was given end-of year bonus and 26%-28% reported performance bonus. The prevalence of profit share decreased from 27% in 2008 to 8% in 2012. (See Table 67).

The percentage of employees reporting redundancies is relatively higher in 2011 (58%) and 2012 (56%) comparing to the period before 2011 when the prevalence was reported by 31%-45% employees. Decreasing trend of the incidence of reorganizations reported by employees has been observed since 2006 when 43% employees confirmed reorganizations (18% more than in 2012). Training opportunities maintained high incidence also in the period after year 2009 when training was reported by 66%-70% employees. The percentage of employees judging management strategy of organization as competent in 2012 is comparable to 2011 51% level, however values before year 2009 are not still achieved (See Table 68).

⁷ First year when reporting holiday bonus was no longer necessary.

More information can be found in the relevant tables and figures (source for all: own calculations based on the WageIndicator dataset, only employees taken into account)

Table 66: Median gross hourly wage

	Year of the survey						
	2006	2007	2008	2009	2010	2011	2012
Information and communication	15.6	17.2	17.5	17.7	17.6	18.7	17.3
Annual % change		10.3%	1.7%	1.1%	-0.6%	6.2%	-7.5

Table 67: Overview of bonuses received by employees; percentage of employees

Year of the survey	Employee bonus				
	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 ⁸	60%	16%	7%	11%	28%
2011	63%	16%	7%	12%	28%
2012	61%	14%	7%	8%	26%

Table 68: Workers' perceptions about the past 12 months in the organization

Year of the survey	Past 12 months of organisations			
	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%
2012	56%	67%	25%	50%

⁸ First year when reporting holiday bonus was no longer necessary.

3. Worldwide comparison of occupations

The WageIndicator database allows for wage comparisons across different occupational groups and across various countries in the European Union, former Soviet Union area, and the Americas. Furthermore, the analysis also takes into account a few Asian and African countries. Due to different price levels in the above countries, we employ two different concepts of wages accounting for the price differentials. :

1. Gross and net wage in **international US dollars** expresses the wage in US dollars that have the same purchasing power as the US dollars have 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 calculated according to the Big Mac Index published by the Economist magazine.

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

The hypothesis that the Dutch wages are amongst the highest in the world is confirmed by Global Wage Comparison. However, they no longer lead the list as they did in 2011 due to addition of a new country - the United States to this year's Loonwijzer – Monsterboard Wage Index report. In 3 out of 4 studied categories, namely 1. Managers, 2. Professionals and 3. Technicians and associate professionals, median American wages are significantly higher than median wages in the Netherlands and the rest of the world. The Dominance of American wages in terms of medians cannot be verified in the fourth category 4, Clerical support workers due to the lack of a sufficient number of observations.

Managers from the United States with median gross hourly wage of 31.1 international US dollars (\$) can afford to buy 5 Big Macs per hour. Only three European countries surpass median value of 25\$, namely the Netherlands (26.9\$), Sweden (25.2\$) and the United Kingdom (25.1\$). Among the rest of studied countries, only Chile (19.8\$) and South Africa (21.5\$) are close to the European wage levels. Former Soviet Union countries except Ukraine exhibit rather similar results; the median wage there is varying from 6\$ to 6.5\$. Median wages of Indian managers (11.1\$) are the highest amongst the examined Asian countries.

Professionals in three countries receive higher median gross hourly wages than in the Netherlands (22.4\$). Professionals can find higher wages in the United States (28.1\$), in Germany (25.8\$) and in the United Kingdom (24.2\$). On the other hand wage situation of professionals in Egypt, Zimbabwe and Indonesia, where median gross hourly wages hardly reach 3.5\$, is in sharp contrast to the Western countries.

Median gross hourly wage of Dutch technicians and associate professionals with the value of 19.5\$ holds third place in our wage comparison after Germany (20.9\$) and the United States (23.8\$). Dutch clerical support workers earn 17.1\$ in median - 40¢ less than their colleagues in Germany. (See Tables 63 - 66).

Table 69: Global comparison of managers' wages

Managers	Median gross hourly wage in international US dollars	Median net hourly wage in international US dollars	Median number of Big Macs per hour	Number of observation
United States	31.1	21.9	5.0	136
Belgium	22.5	13.9	3.3	355
Germany	20.7	13.2	3.0	650
Netherlands	26.9	16.6	4.2	1,453
Spain	20.8	15.2	3.3	226
Sweden	25.2	16.9	3.2	142
United Kingdom	25.1	17.6	4.4	200
Czech Republic	16.1	11.8	2.3	131
Argentina	15.9	12.8	2.0	543
Brazil	7.4	6.0	1.1	877
Colombia	13.7	11.7	1.8	112
Chile	19.8	15.7	3.1	181
Mexico	16.2	12.4	3.0	154
Azerbaijan	6.3	5.3		118
Belarus	6.5	5.5		2,381
Kazakhstan	6.0	4.8		1,086
Russian Federation	6.5	5.5	1.8	314
Ukraine	4.8	3.9		1,692
China	5.4	4.4	1.2	416
India	11.1	9.5	2.2	1,448
Indonesia	3.2	2.7	0.8	1,016
Vietnam	7.4	6.4		154
Sri Lanka	5.1	4.3		106
South Africa	21.5	16.2	4.6	1,089

Source: WageIndicator (2011-2012) ; Purchasing power parity adjustment based on the IMF's WEO database (October 2012); Big Mac wage based on the Economist's Big Mac Index (July 2012) Note: Only results for countries with more than 100 observations are reported

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 number of Big Macs per hour	Number of observations
United States	28.1	20.0	4.6	218
Belgium	18.8	12.4	2.9	829
Finland	19.2	13.1	3.4	231
Germany	25.8	15.9	3.6	6,099
Italy	16.2	11.3	2.7	224
Netherlands	22.4	14.7	3.7	3,484
Spain	17.0	12.2	2.6	500
Sweden	20.5	14.5	2.7	400
United Kingdom	24.2	16.8	4.2	340
Czech Republic	13.2	9.8	1.9	325
Hungary	8.4	5.4	1.0	141
Argentina	12.6	10.3	1.6	1,378
Brazil	7.3	5.9	1.1	1,666
Colombia	9.7	8.1	1.2	245
Chile	12.9	9.9	2.0	460
Mexico	11.7	9.1	2.2	372
Azerbaijan	5.0	4.2		392
Belarus	5.4	4.5		8,727
Kazakhstan	4.7	3.8		3,575
Russian Federation	5.0	4.2	1.4	1,128
Ukraine	3.9	3.1		4,677
China	4.6	3.9	1.0	1,160
Pakistan	3.9	3.7	0.5	126
India	8.3	7.1	1.7	3,651
Indonesia	2.8	2.3	0.7	1,248
Vietnam	5.8	5.4		916
Sri Lanka	3.9	3.5		323
Egypt	2.3	1.3		437
Ghana	8.9	6.2		113
Kenya	6.9	5.0		120
Mozambique	8.3	7.2		204
South Africa	19.1	14.1	4.0	2,120
Tanzania	8.4	5.7		110
Zambia	5.6	3.8		117
Zimbabwe	3.4	2.5		117

Source: WageIndicator (2011-2012); Purchasing power parity adjustment based on the IMF's WEO database (October 2012); Big Mac wage based on the Economist's Big Mac Index (July 2012). Note: Only results for countries with more than 100 observations are reported

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 number of Big Macs per hour	Number of observation
United States	23.8	17.1	4.0	153
Belgium	17.3	11.5	2.7	792
Finland	16.6	11.9	3.1	208
Germany	20.9	13.5	3.1	2,989
Italy	16.5	11.0	2.6	137
Netherlands	19.5	13.2	3.3	3,954
Spain	14.7	10.5	2.3	247
Sweden	19.0	13.5	2.6	206
United Kingdom	19.0	13.8	3.4	203
Czech Republic	10.6	8.1	1.6	212
Hungary	6.8	4.7	0.8	142
Argentina	9.7	7.8	1.2	1,172
Brazil	4.3	3.6	0.7	1,932
Colombia	6.7	5.5	0.8	151
Chile	8.1	6.3	1.3	250
Mexico	6.6	5.5	1.3	205
Azerbaijan	4.7	4.0		210
Belarus	5.1	4.3		6,076
Kazakhstan	3.8	3.2		3,017
Russian Federation	4.4	3.8	1.2	856
Ukraine	3.5	2.8		4,384
China	3.6	3.1	0.8	722
India	5.9	5.2	1.2	1,176
Indonesia	2.4	2.0	0.6	1,056
Vietnam	6.0	5.7		587
Sri Lanka	2.9	2.6		112
Egypt	2.1	1.5		148
Mozambique	5.5	5.0		170
South Africa	13.0	10.3	2.9	1,697

Source: WageIndicator (2011-2012); Purchasing power parity adjustment based on the IMF's WEO database (October 2012); Big Mac wage based on the Economist's Big Mac Index (July 2012) Note: Only results for countries with more than 100 observations are reported

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	Number of observation
Belgium	15.4	10.6	2.5	825
Finland	14.2	10.6	2.8	214
Germany	17.5	11.4	2.6	3,430
Italy	14.2	9.7	2.3	155
Netherlands	17.1	12.1	3.1	3,846
Spain	12.2	9.0	1.9	362
Sweden	16.5	12.2	2.3	106
United Kingdom	16.0	11.7	2.9	152
Czech Republic	9.1	6.9	1.3	176
Argentina	7.9	6.4	1.0	1,916
Brazil	3.1	2.6	0.5	2,415
Paraguay	3.7	3.2		137
Colombia	5.0	4.3	0.7	249
Chile	6.0	4.6	0.9	322
Mexico	5.3	4.4	1.1	286
Azerbaijan	4.6	3.7		165
Belarus	4.5	3.9		3,593
Kazakhstan	3.8	3.1		1,784
Russian Federation	3.7	3.2	1.0	459
Ukraine	3.2	2.5		2,638
China	3.1	2.7	0.7	1,068
India	2.9	2.5	0.6	773
Indonesia	2.1	1.7	0.5	1,009
Vietnam	1.8	1.6		1,070
Mozambique	4.2	3.7		200
South Africa	8.5	6.9	2.0	1,430

Source: WageIndicator (2011-2012); Purchasing power parity adjustment based on the IMF's WEO database (October 2012); Big Mac wage based on the Economist's Big Mac Index (July 2012). Note: Only results for countries with more than 100 observations are reported

Appendix

Table 73: Structure of the whole sample in the Netherlands in the period 2011 - 2012

	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	397	29%	54%	17%	41%	34%	7%	9%	9%	8%	11%	18%	63%	31%
Construction, fittings, housing	1407	34%	46%	20%	21%	41%	16%	15%	7%	6%	9%	16%	70%	11%
Education, research, training	837	6%	17%	76%	7%	31%	12%	25%	25%	6%	9%	15%	71%	59%
Finance, banking, insurance	1882	6%	45%	49%	17%	26%	8%	22%	27%	4%	11%	16%	68%	51%
Health care, paramedics, laboratory	1581	12%	49%	39%	17%	22%	7%	16%	38%	6%	8%	16%	70%	82%
Hospitality, tourism, leisure, sports	1398	26%	56%	18%	25%	45%	13%	10%	6%	8%	13%	25%	54%	63%
Industrial production, manufacture, metal	1650	32%	53%	15%	10%	32%	18%	25%	15%	4%	6%	11%	79%	19%
IT, automation, telecommunication	2116	6%	37%	57%	9%	24%	11%	22%	33%	6%	11%	18%	65%	16%
Marketing, PR, advertising	805	3%	17%	80%	15%	35%	12%	19%	18%	11%	14%	25%	49%	68%
Transport, logistics, port, airport	1502	39%	48%	13%	11%	25%	16%	27%	20%	3%	7%	13%	77%	19%
Total	13575	19%	44%	37%	16%	31%	12%	20%	22%	6%	10%	17%	68%	40%

	Region			
	North	East	West	South
Agriculture, nature, animals, environment	15%	27%	40%	19%
Construction, fittings, housing	11%	26%	40%	24%
Education, research, training	8%	24%	47%	20%
Finance, banking, insurance	8%	21%	53%	18%
Health care, paramedics, laboratory	12%	23%	44%	21%
Hospitality, tourism, leisure, sports	10%	21%	50%	19%
Industrial production, manufacture, metal	12%	27%	31%	30%
IT, automation, telecommunication	6%	21%	51%	21%
Marketing, PR, advertising	5%	16%	61%	18%
Transport, logistics, port, airport	7%	21%	46%	25%
Total	9%	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.

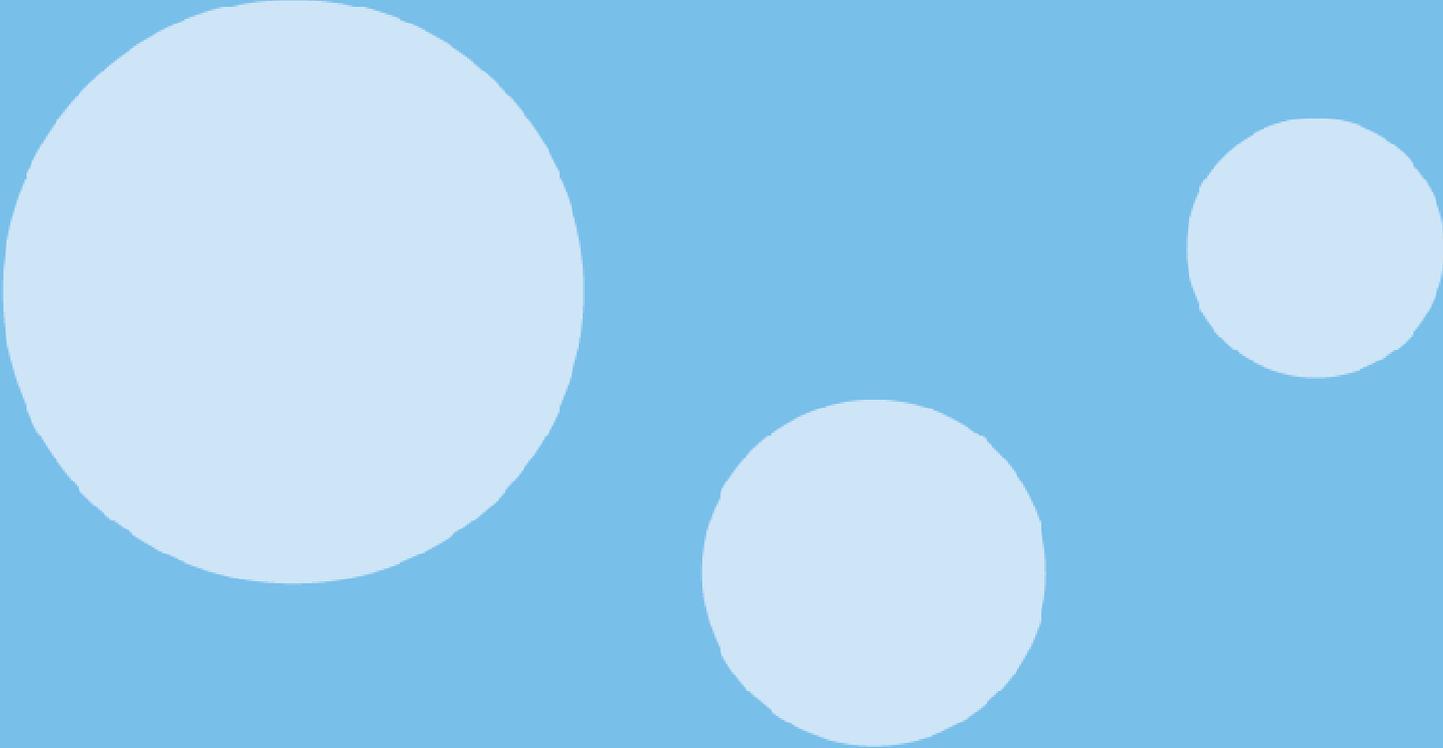
Table 74: Most frequented professions in examined professional groups

Managers	Share of Profession	Professionals	Share of Profession
Business services and administration managers	18.48%	Software and applications developers and analysts	13.59%
Sales and marketing managers	13.28%	Engineering professionals	13.20%
Managing directors and chief executives	12.66%	Administration professionals	8.97%
Human resource managers	9.81%	Finance professionals	7.25%
Finance managers	7.44%	Sales, Marketing and PR professionals	6.87%
Technicians and Associates	Share of Profession	Clerical support workers	Share of Profession
Accounting associate professionals	23.14%	General office clerks	28.87%
Commercial sales representatives	6.91%	Accounting and bookkeeping clerks	9.33%
Administrative and executive secretaries	6.18%	Secretaries	9.20%
ICT user support technicians	5.52%	Stock clerks	8.49%
Draughtspersons	5.18%	Statistical, finance and insurance clerks	7.32%

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