



# Supply Chain & Logistics 2008 Employment Market Survey Report



In association with:



PARTNER 2007/08



AUSTRALIAN LOGISTICS COUNCIL



The Chartered Institute of  
Logistics and Transport

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# Contents

Foreword	2
Employees seek more	3
T&L = Transport & Logistics	4-5
Supply Chain & Logistics roles & positions	6-9
Annual Salaries	10-15
What do employees really want?	16-17
Should I stay or should I go?	17
Flexible Salary Packages	18-21
Benefits:	22-33
Bonuses	22-24
Private Medical Care Program	25-27
Car Allowance	28-30
Child Care	31-33
Non Tangible Benefits	34-36
The Netherlands as a Supply Chain Centre	37
Education & Qualifications	38-39
Languages	40-43
Staff Forecasting - Permanent Staff	44-47
Flexible Working Arrangements	48-51
Staff Forecasting - Casual Staff	52-53
What do young people really think about our industry?	54
Skills Shortage	55-56
Overseas Candidates	57-60
Successful recruitment in the European Market	61
Counter-Offering Employees	62-65
The fight against the War for talent	66
Career Relocation	67-74
Business Activities and Growth	75-78
Key External Factors Impacting Businesses	79-83
The Middle East - a challenging market for employers	84

## Survey Methodology

An on-line survey of approximately 10-15 minute duration was emailed to more than 15,000 people within the Supply Chain & Logistics Industry in Australia, Oceania, Africa, America, Asia, Europe, the Middle East and New Zealand. The survey commenced on the 1st of September 2007 and was closed on the 16th of November 2007. 2446 respondents completed the survey. NB: The results are purely indicative in terms of overall trends within the industry.

Disclaimer: Logistics Recruitment has compiled this report using data from which, to the best knowledge of Logistics Recruitment, was accurate as at the date of the publication. Results published in this report are for the general interest of readers and the industry. All material is published with due care and in good faith, but no responsibility will be accepted for omissions, typographical, or other printing errors or situations that may have taken place after publication. Logistics Recruitment disclaims all responsibility for any harm or loss arising from use or otherwise of the information provided within the report. All rights reserved. No part of this publication may be reproduced without the prior permission of Logistics Recruitment.

## Foreword



**W**elcome to the 2008 Supply Chain and Logistics Employment Market Survey Report. It is our pleasure to deliver our second annual survey report to the Supply Chain and Logistics community that we are proud to serve globally.

This year's report highlights critical factors influencing our industry during a year of continuing global economic growth. Never more than now has our industry experienced such pressure on the most valuable resource of any organisation – people.

As the expanding middle class drives demand for consumer goods in the world's emerging economies, we are seeing dramatic increases in demand for talent across the Mining, Resources, Engineering, Construction, Oil and Gas, Manufacturing, and ultimately the Supply Chain and Logistics sector that provides the vital infrastructure for economic growth.

The competition for talent has driven the need for unprecedented innovation and flexibility by companies as they find themselves in a war for talent from competitors across the road, city, state, country, and the world and increasingly from other sectors as skills are sought and transferred between industry verticals.

The 2008 survey respondents represent a wider geographical sample than 2007 and provide a useful insight into the emerging trends affecting human resources across different regions. The report shows the movement to greater flexibility in workplace conditions and benefits, including private medical care programs, child care, technology support, salary sacrifice, and other incentives to retain existing staff and attract new talent.

The report highlights enhanced levels of education and professionalism across the Supply Chain and Logistics industry. Survey results show that 24.93% of the total respondents have completed a Postgraduate Degree and 21.03% have completed an Undergraduate Degree.

The international scope of our industry is illustrated by that fact that 30.55% of the total respondents are fluent in two languages and 22.73% are fluent in three languages.

Increasing career mobility within the Supply Chain and Logistics sector is evidenced by the fact that 83.13% of respondents indicated that they would consider relocation for their career in the future. The increasing trend of mobility, nationally and internationally, is indicative of how personnel are interested in relocating to advance their salaries, skills and career opportunities.

Logistics Recruitment would like to take this opportunity to once again thank everyone who has participated in this survey, with special thanks to our contributing columnists and acknowledgment to the leading industry organisations and their members who participated in this year's survey.

- Supply Chain Asia (SCA),
- Australian Logistics Council (ALC),
- Supply Chain Logistics Group - Middle East (SCLG),
- Logistics Association Australia (LAA),
- Supply Chain & Logistics Association of Australia (SCLAA),
- The Chartered Institute of Logistics and Transport (CILT),
- Transport and Logistics Centre - Australia (TALC).

We hope that the report will provide a better understanding of industry trends relating to the human resources so vital to the future of the Supply Chain and Logistics sector worldwide and that the results will assist in decision making for industry businesses and individuals during 2008.

We welcome feedback and input on areas of interest and inclusion for the next survey.

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Logistics Recruitment produces quarterly Salary Guides on a regional basis. Logistics Recruitment's Salary Guides track salary bands across a range of positions within the Supply Chain and Logistics industries and track changes to these. To enquire about subscribing to the salary guide or our global salary benchmarking services see our website [www.logisticsrecruitment.com.au](http://www.logisticsrecruitment.com.au)

## Employees seek more



**S**upplyChain Review recently conducted its annual Who's Who in Contract Distribution Survey, a comprehensive appraisal of Australasia's leading third-party logistics providers.

From top to bottom, businesses identified a shortage of qualified staff as a key bottleneck to growing and in some cases, even maintaining their operations. Most businesses said they needed to grow their staffing levels by at least 20 percent over the next 12 months.

### So where are they going to come from?

The problem, of course, is not restricted to third-party logistics providers, but extends across the gamut of Supply Chain, Logistics and transport fields.

What the 2008 Logistics Recruitment Employment Market Survey Report shows is how diverse and rewarding – financially or otherwise – the Supply Chain and Logistics industry is. As anyone who works within the sector is generally quick to point out.

But the survey also reveals the lack of effort by employers to retain staff. It is not enough to offer a dynamic work experience – employees want and expect more.

Employees want to work for a company they can be

proud of - a company with a corporate conscious. They want to work for inspiring leaders on substantial projects. They want more responsibility, while retaining flexibility for a work/life balance.

And there's the extras – cars and computers, gym access and massage programs, good coffee and Friday drinks, fringe benefits and salary sacrifice, child care and flexibility in hours. These are not perks, increasingly they are the reality of running a business and keeping staff on the books.

But the job for business is much greater. Collectively, it must champion the Supply Chain and Logistics sector to attract a new generation of workers - the industry leaders of the future.

A number of key industry associations, supported by the more proactive businesses in the field, are investing in important promotion and recruitment strategies. They need all the help they can.

As much as the Logistics Recruitment Employment Market Survey Report is a beacon to highlight recruitment and retention challenges, it is a powerful marketing tool to promote the size and scope of the Supply Chain and Logistics sector. Arm yourself with its contents and distribute it widely.

There is no bigger issue than employment and labour shortages, and we applaud Logistics Recruitment for its work in the field and its comprehensive and important Employment Market Survey Report.

SupplyChain Review is the leading Logistics management publication in Australasia, first with news and information crucial for Supply Chain and Logistics practitioners online at ChainMail.com.au and in-depth analysis of sector issues and case studies in print bi-monthly.

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## T&L = Transport & Logistics

**T**ransport and Logistics (T&L) is ‘the biggest show in town’ and is continuing to grow at record rates, outstripping GDP growth. T&L is a challenging and incredibly exciting place to work with global career opportunities and working in this industry makes a very real difference to the way of life for every Australian.

The importance and the contribution of the industry, however, are not new. It has always been the case that towns, cities and economies grow where transport and trade routes meet. Towns have been built where rivers meet or at the intersection of roads and rail lines. If towns are by-passed economic growth slows down.

Where towns and cities have good natural ports or enjoy efficient transport links they prosper. Transport and Logistics (T&L) has always been a central part of economic growth, social development and prosperity. Australia today is no different.

There is a direct relationship between T&L and prosperity.

The Australian Logistics Council (ALC) recently commissioned research that showed that T&L contributes a staggering 14.50% of GDP and the ‘league ladder’ below shows some comparisons with other industries including Construction and Mining.

The way that T&L is managed and governed is changing quickly. Traditionally T&L has been an activity that grew based on separate transport modes and regulated by State Governments.

This varies from State to State but it is clear that T&L is a major, pivotal part of the Australian economy. It generates approximately 464,000 jobs and encompasses about 165,000 businesses (135,000 of these with five or less employees).

It is of tremendous importance to our farmers, miners and business people and is an often invisible part of the fabric of every Australian, every day.

**Table 1: League ladder of Australian industries**

RANK	INDUSTRY	EQUIVALENCE OF GDP
1.	Transport and Logistics	14.50%
2.	Manufacturing	10.30%
3.	Property and Business Services	9.90%
4.	Finance and Insurance	6.00%
5.	Construction	5.60%
6.	Health and Community Services	5.20%
7.	Retail Trade	5.10%
8.	Mining	4.70%
9.	Wholesale Trade	4.10%
10.	Education	3.80%
11.	Government	3.40%
12.	Agriculture, Forestry and Fishing	2.70%
13.	Communication	2.30%
14.	Electricity, Gas and Water Supply	1.90%

Note: 1. Excludes ownership of dwellings and taxes less subsidies on products.

Source: ALC Report – quoting ABS (2006), ‘National Income, Expenditure and Product’, Cat No 5206. Apelbaum Consulting Group.

## T&L = Transport & Logistics *cont...*

Customer expectations, enabled by rapid improvement in communications technology and e-commerce now mean that customers demand outcomes, with Logistics services delivering on-time in-full. Whether the freight moves on metal wheels, rubber wheels, flies or floats has little relevance. In fact T&L would perhaps be defined as that activity that happens in the early hours of the morning with minimal environmental impact, no noise and no congestion. The better the T&L industry gets at the job the more invisible it becomes.

This however, is a problem because the industry only hits the headlines when ships queue off ports, rail capacity limits export earnings and business profits or jobs are lost because infrastructure can not keep up with growth in demand. It is too late to only pay attention to this essential industry when a crisis hits.

The lead times for investment in people and in infrastructure are substantial and so are the dollars involved. Australia is the most decentralised, inhabited continent with enormous distances between population centres. Likewise we are remote from our international trading partners.

- Whichever way it is considered T&L is profoundly important to the prosperity and growth of Australia.
- T&L is a major part of our economy.
- It directly impacts on the prices consumers pay in Australia and on the competitiveness of our exporters.
- It is low on political agendas because it is invisible to voters.
- A small improvement in the efficiency in delivery of Australian T&L delivers a disproportionately large windfall to customers at home and a competitive advantage to exporters.
- It is a 'make or break' issue that demands attention and priority.

Australia is particularly vulnerable to T&L because of the 'tyranny of distance'.



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AUSTRALIAN LOGISTICS COUNCIL

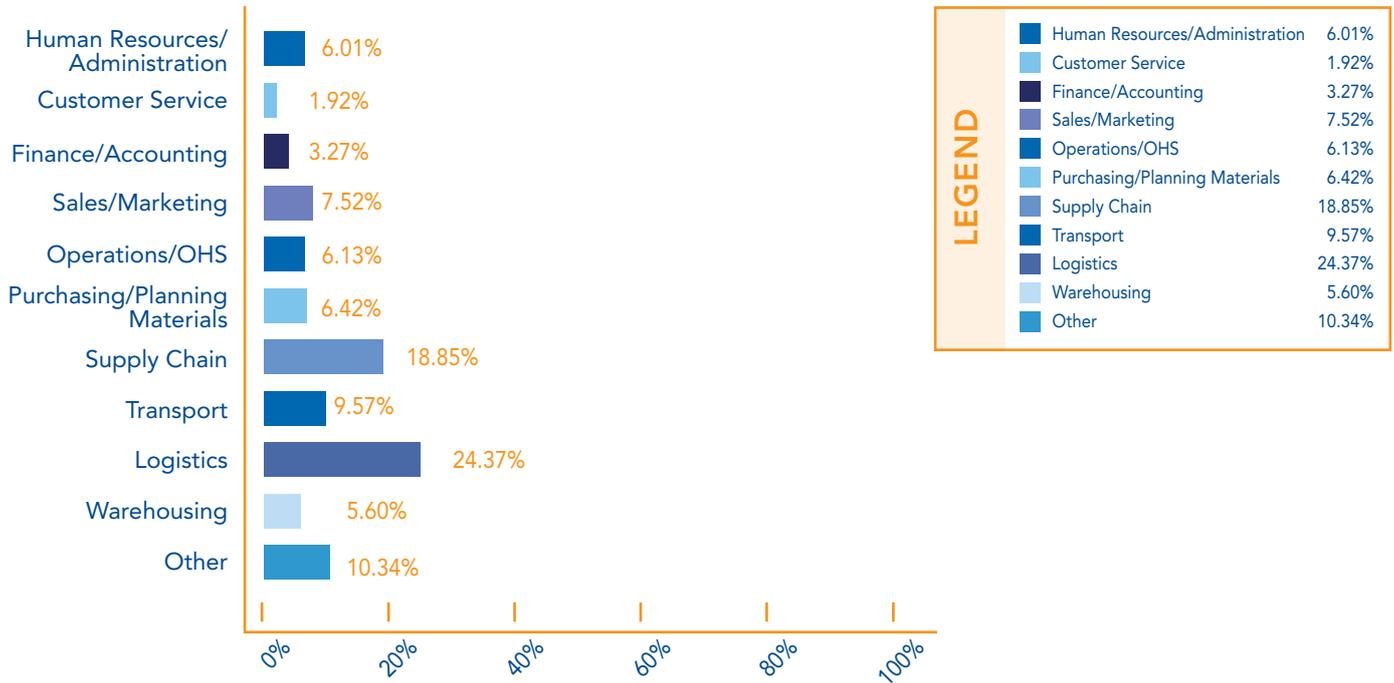
## The Equivalence Of Transport & Logistics To GDP By State/Territory, 2004/05



Source: ALC Report – T&L Contribution to GDP June 2007

# Supply Chain & Logistics roles & positions

## What role or area do you currently work in?



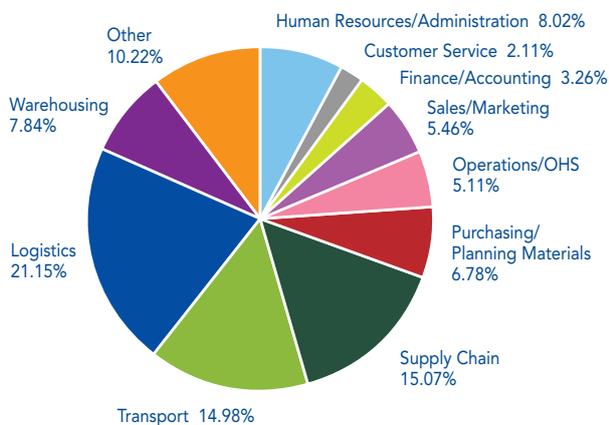
### Top two areas of employment

#### Logistics

- 24.37% of the total respondents are employed in the field of Logistics.
- 51.40% classified their role as a Logistics Manager.

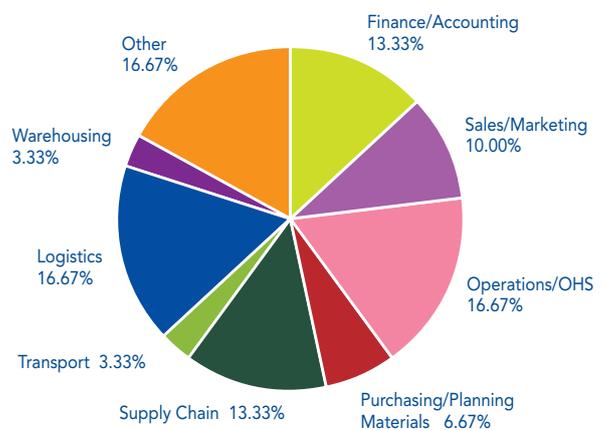
#### Supply Chain

- 18.85% of the total respondents are employed in the field of Supply Chain.
- 25.00% classified their role as a National Supply Chain Manager.



### Australia

- 21.15% of the respondents in Australia are employed in the field of Logistics. 43.81% classified their role as Logistics Manager.
- 15.07% of the respondents in Australia are employed in the field of Supply Chain.

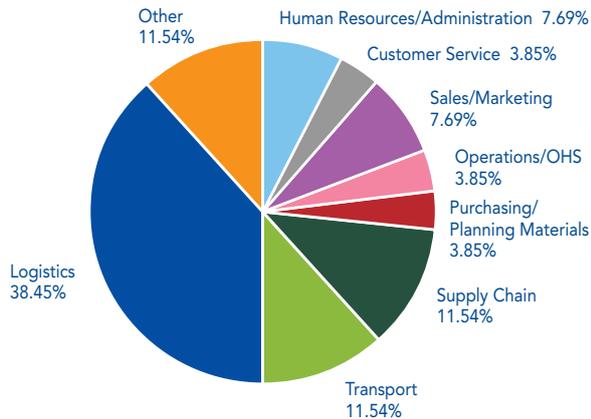


### Africa

- 16.67% of the respondents in Africa are employed in the field of Logistics. 40.00% classified their role as Logistics Manager.
- 16.67% of the respondents in Africa are employed in the field of Operations/OHS.

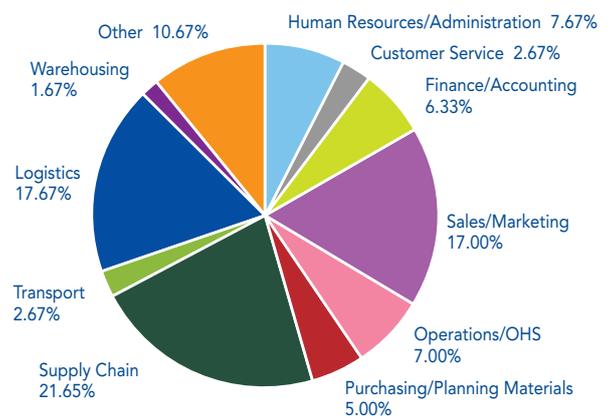
# Supply Chain & Logistics roles & positions

## What role or area do you currently work in?



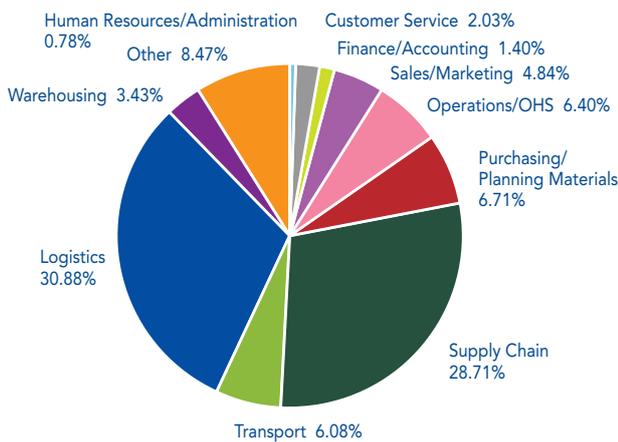
### America

- 38.45% of the respondents in America are employed in the field of Logistics. 60.00% classified their role as Logistics Director
- Both the fields of Logistics and Supply Chain employ 11.54%.



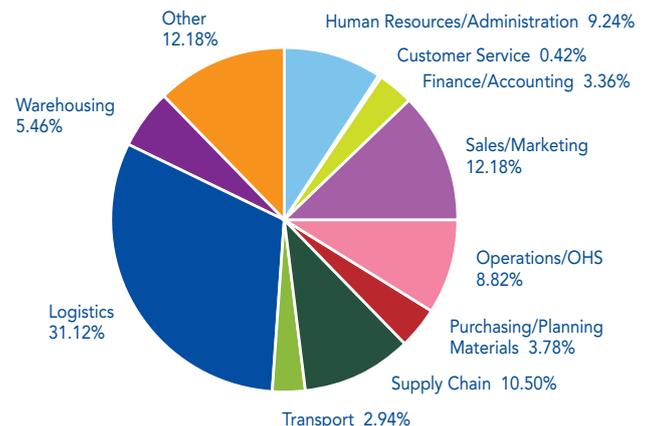
### Asia

- 21.65% of the respondents in Asia are employed in the field of Supply Chain. 28.33% classified their role as National Supply Chain Manager.



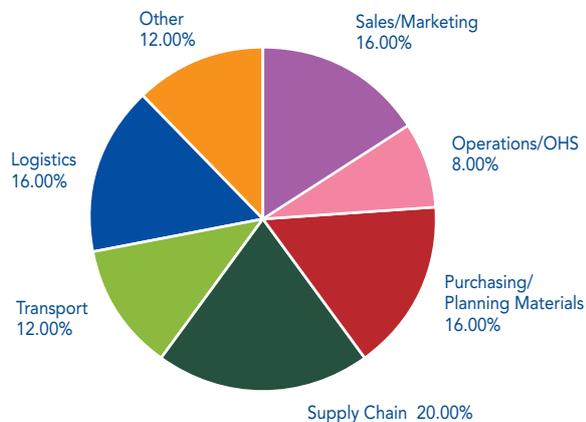
### Europe

- 30.88% of the respondents in Europe are employed in the field of Logistics. 62.30% classified their role as Logistics Manager.
- 28.71% are employed in the field of Supply Chain.



### Middle East

- 31.12% of the respondents in the Middle East are employed in the field of Logistics. 50.72% classified their role as Logistics Manager.



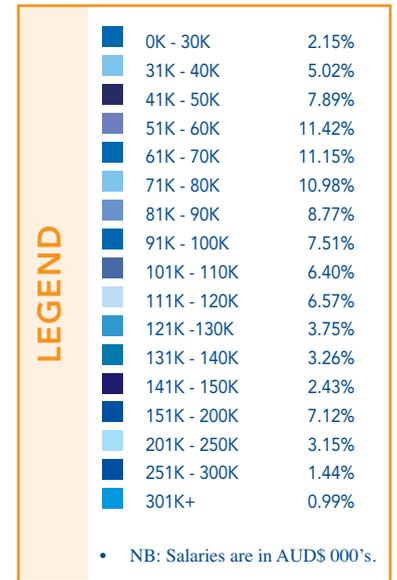
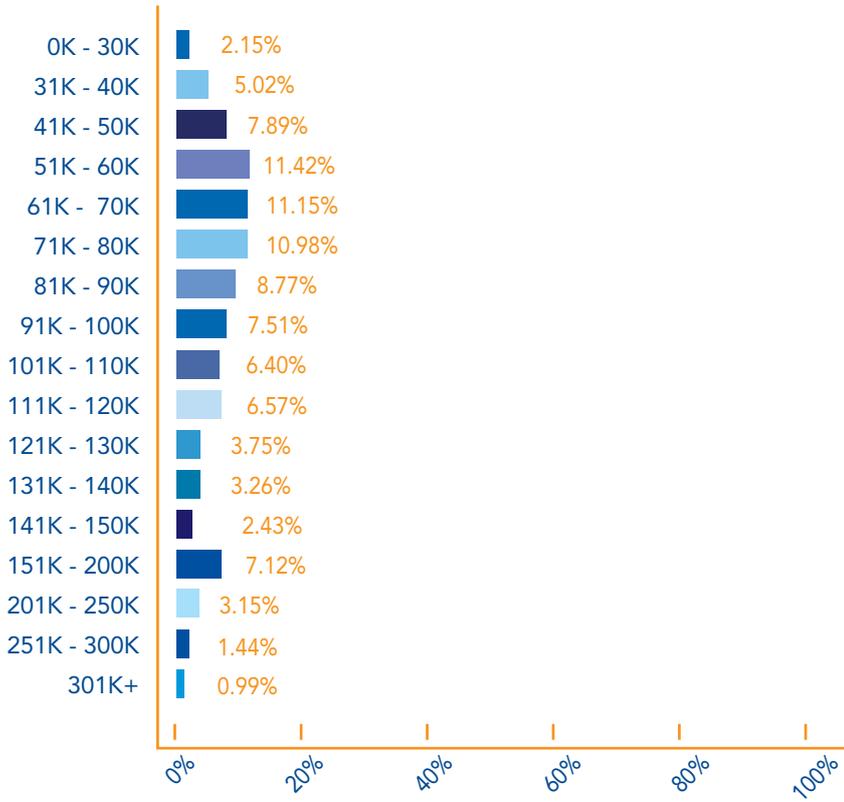
### New Zealand

- 20.00% of the respondents in New Zealand are employed in the field of Supply Chain. 100.00% classified their role as National Supply Chain Manager.



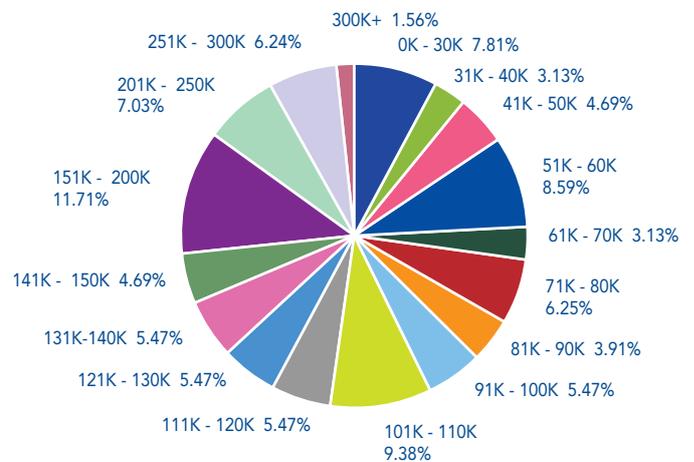
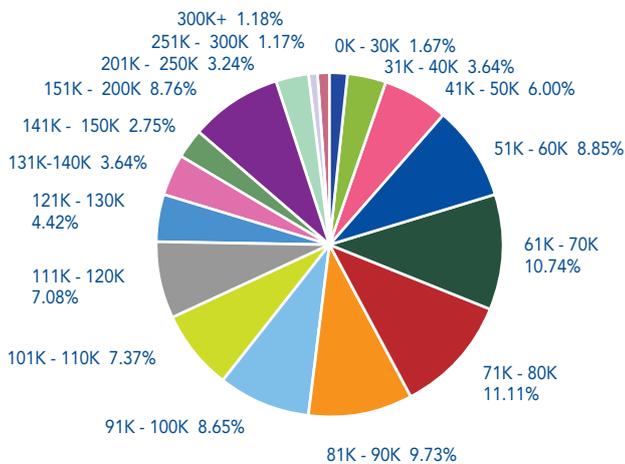
# Annual Salaries

## What is your annual salary?



### Overall Findings

- 11.42% of the total respondents indicated that they are on an annual salary of \$51,000 - \$60,000.
- 11.15% of the total respondents indicated that they are on an annual salary of \$61,000 - \$70,000.
- 10.98% of the total respondents indicated that they are on an annual salary of \$71,000 - \$80,000.



### Extract from Australia

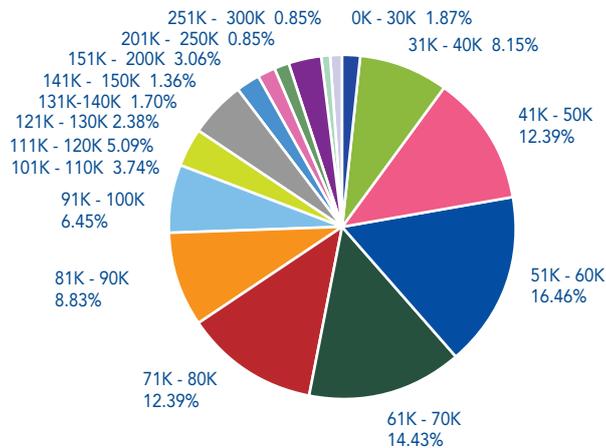
- 11.11% of the respondents in Australia indicated that they are earning \$71,000 - \$80,000 per annum. NB: Earnings are displayed in AUD\$ 000's.

### Extract from America

- 11.71% of the respondents in America indicated that they are earning \$151,000 - \$200,000 per annum. NB: Earnings are displayed in USD\$ 000's.

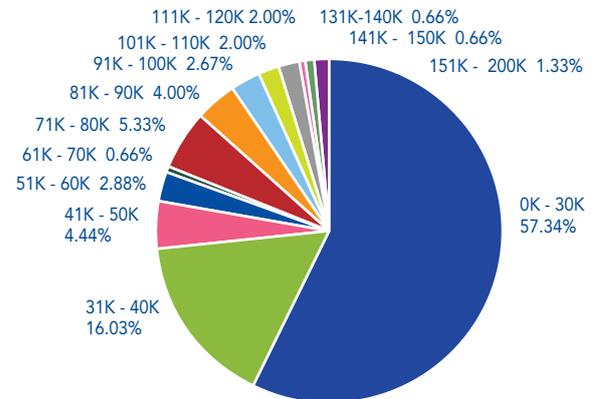
# Annual Salaries

## What is your annual salary?



### Extract from Europe

- 16.46% of the respondents in Europe indicated that they are earning \$51,000 - 60,000 per annum. NB: Earnings are displayed in Euros\$ 000's.

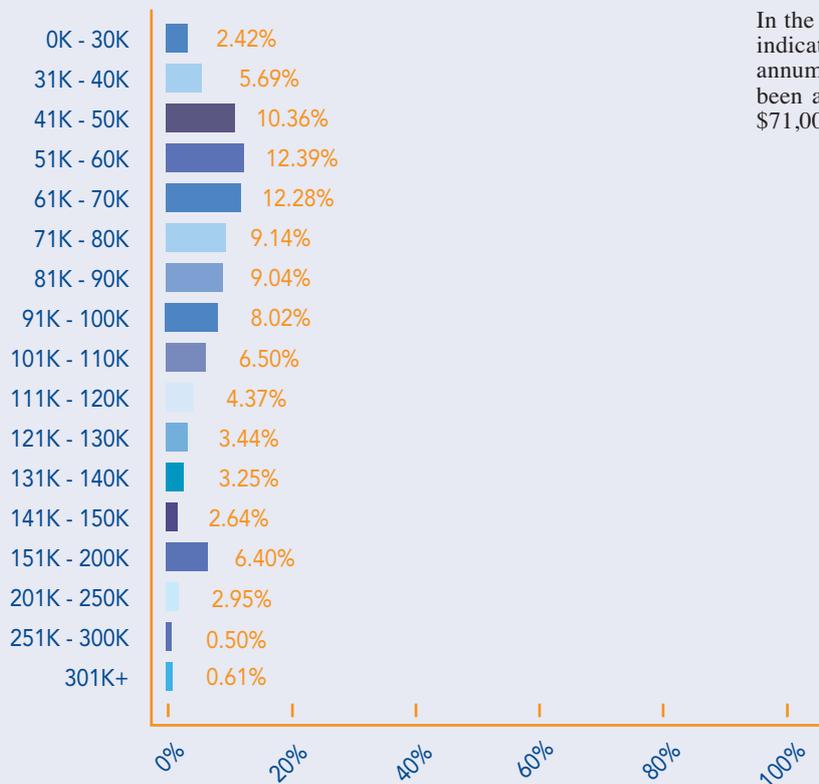


### Extract from Asia

- 57.34% of the respondents in Asia indicated that they are earning under \$30,000 per annum. NB: Earnings are displayed in equivalent USD\$ 000's.

## Comparison to the 2007 results

### What is your annual salary?



In the 2007 report 12.39% of the total respondents indicated that they earn \$51,000 to \$60,000 per annum. With the 2008 results showing that there has been an increase in the people who earn between \$71,000 and \$80,000 a year.

# What do employees really want?

## Employees do not want jobs.

If your employees do not want a job, what do they want? As we are now facing a skills shortage globally companies need to understand what inspires a candidate to work for them and not the competitor.

A lot of energy and research has been devoted to finding out what employees are looking for; working with ethical companies, enjoying work/life balance, having career progression and working for inspirational managers. These results are all very well, but what does this really mean?

## Employees Ethical Companies

What do employees define as ethical companies? We are not talking about companies out saving the planet by climbing trees or interrupting whale boats. We are talking about companies who legitimately implement programs to make a difference.

Companies who ensure that lights are turned off each night, have energy and water efficient offices, use recycled paper and request staff to print only when necessary. These are simple and easy steps that every company can take.

## Corporate Social Responsibility

The modern workforce is also striving to work with companies that have an element of Corporate Social Responsibility (CSR). One way is to develop a CSR program whereby employees assist the sick or homeless on a regular basis. The program encourages and supports volunteerism amongst their employees.

Another way is to establish a program to employ underprivileged or people with disabilities. Every company, no matter how small, CAN do something.

## Work/Life Balance

What does work/life balance really mean? Does it really exist? The work/life balance is quite simply about understanding that your employee is not just a service manager, forklift driver or receptionist. They are people who have other interests and responsibilities outside the working environment that require their energy and time. Do you really know and understand your employees? Do you know their hobbies, their passions, whether they are volunteer fire fighters, ballroom dancers or marathon runners in their personal life?

To develop a work/life balance the employer is responsible for knowing these things and allowing employees the flexibility to undertake those roles and participate in their community.

Without support from employers these things cannot happen.

Maternity leave is also an issue. We need to STOP talking about maternity leave and allow for family leave. Many employees need the flexibility in their working arrangement to tend to sick children, parents and partners without becoming isolated from their working environment.

Having an employer that allows employees with these needs to either work from home or offering shared shifts can make a huge difference during this time.

Companies who implement job share options, travel leave, study leave, WILL promote higher retention rates. Employees will no longer feel as though their employment and position in the company is threatened. In turn, these employees will log on and work weekends, nights - whatever is necessary to get the job done.

Travel leave is not new. The younger generations always want to pack up their bags and travel the world for a while. Supporting travel leave within your employees and letting them know that the door is always open will see many return.

## Inspirational Managers

What really inspires employees? Inspirational Managers are ones who act as leaders and mentors, who coach and assist their employees to learn and develop. A good Manager inspires success and gives their knowledge freely. Managers, who can lead and take ownership of strategic direction, while fostering inclusion of all team members, are highly regarded by today's workforce. If the research is true that people join companies, but leave Managers, then having the right Managers in place will continue to assist with staff recruitment and retention.

## Career progression

Employees are looking for clear guidance of what is expected of them, how it will be measured and then recognising their success through acknowledgement and promotion. Promotion however does not necessarily mean a new job title and office. For many companies it mostly entails giving project leadership to employees as their knowledge and experience grows. Project focussed work also helps to maintain excitement, achievement and learning in an employee.

## Recognition

So you have implemented all the above. Every Manager in your company is now a skilled and inspirational leader. Employees are given one day a month off to volunteer and as needed, can work flexible hours to fit around their lifestyle.

## What do employees really want? *cont...*

You can now sit back and wait for all the skilled and qualified potential employees to knock on your door begging to work for you – well, not quite.

Despite all of this, if you do not recognise effort in the form of pay, you will still lose that perfect candidate to a better offer. Paying below market rate will always see you struggling to attract and retain staff.

A cohesive team and a flexible working environment will create loyalty and retention, only if it is also part of a pay structure that is in line with market rate and increases in line with knowledge and for a job well done. Paying completion bonuses for projects delivered ahead of time and under budget, allowing for one-off bonuses on completion of work related education and undertaking salary reviews before you

are forced into a counter-offer will go a long way to having the illusive skilled, educated and loyal employee to come knocking.



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## Should I stay or should I go?

**E**mployees have revealed globally that when it comes to considering a counter-offer from their current employer, only 5.00 % would accept the offer immediately. A recent survey in Singapore shows that 26.00 % of employees would reject the offer immediately, whilst 65.00 % would consider the offer before making a decision.

Gary Enderby, Senior Recruitment Manager – Singapore, believes that the results indicate that employees are becoming aware of the dangers of accepting a counter-offer.

“Once someone has made the decision to seriously look elsewhere for employment, it is likely the working relationship will dissolve within 12 months anyway, even if they do decide to accept the counter-offer and stay,” Mr Enderby said.

“The reason is twofold; the bond of trust between a candidate and employer may have been damaged, which can potentially lead to distrust or lower team morale,”

Unless other retention strategies are in place, it is unlikely that a financial incentive alone will remedy all the reasons an employee had for leaving in the first place.

“Amidst the pressures of a tight candidate market, retaining the best talent is an on-going challenge for business. However both employers and employees should understand that counter-offers are one of the least successful retention strategies available.”

The Singapore survey also highlighted that one third of employees would immediately reject a counter-offer without consideration because they were confident their decision to leave the company was the right one.



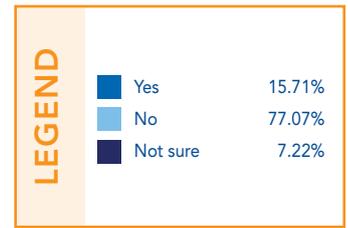
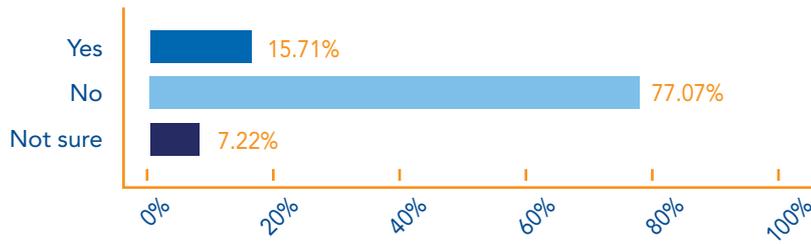
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## Benefits: Child Care

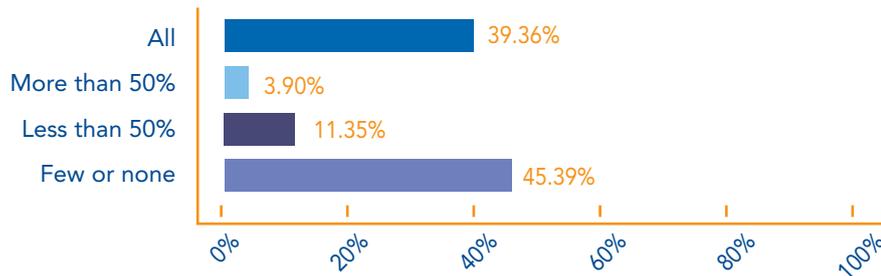
### Is child care offered by your company?



#### Overall Findings

- 15.71% of the total respondents indicated that child care is offered by their company. This compares to 7.51% in the 2007 results.

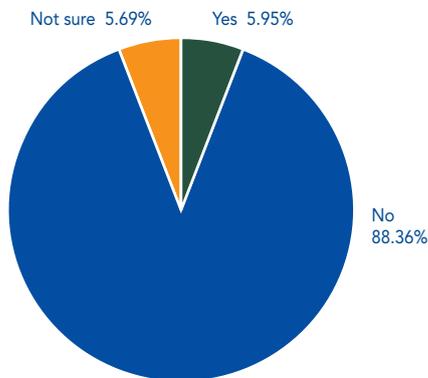
### If yes, what % of employees has access to child care?



#### Overall Findings

- 45.39% of the total respondents believe that few or no employees have access to child care services.

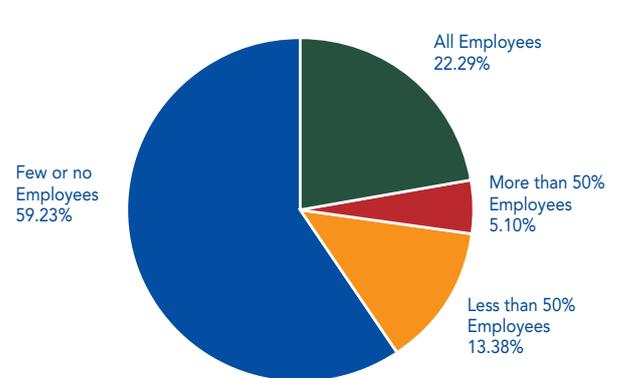
### Is this offered by your company?



#### Australia

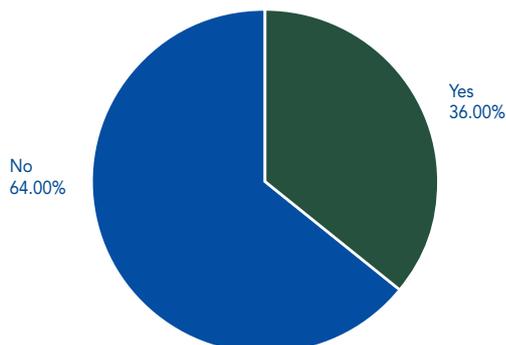
- 5.95% of the respondents in Australia indicated that child care services are offered by their company.

### If yes, what % of employees have access to it?



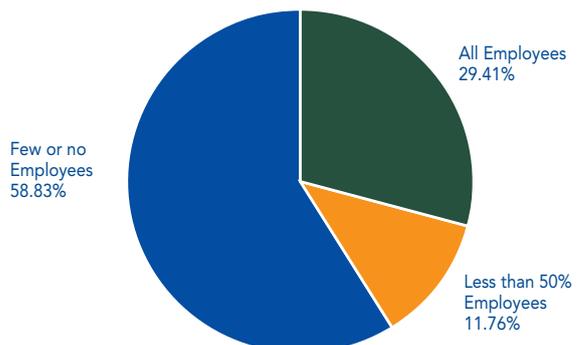
#### Australia

- 22.29% of the respondents in Australia believe that all employees have access to child care services.



#### Africa

- 36.00% of the respondents in Africa indicated that child care services are offered by their company.

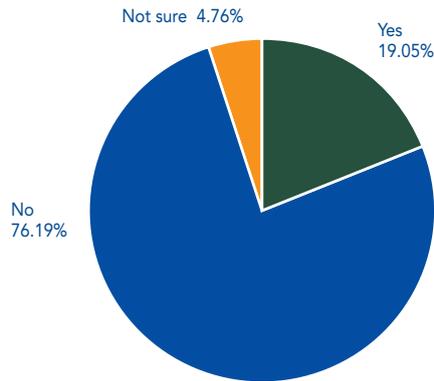


#### Africa

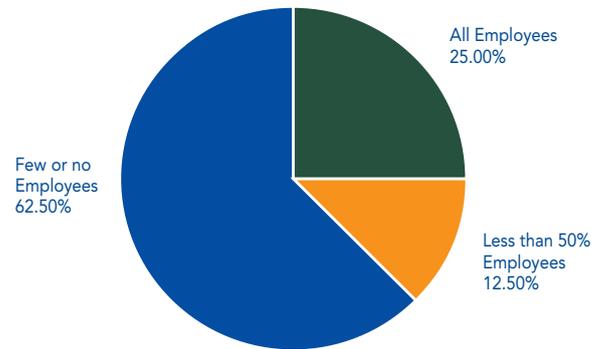
- 29.41% of the respondents in Africa believe that all employees have access to child care services.

# Benefits: Child Care

Is this offered by your company?



If yes, what % of employees have access to it?

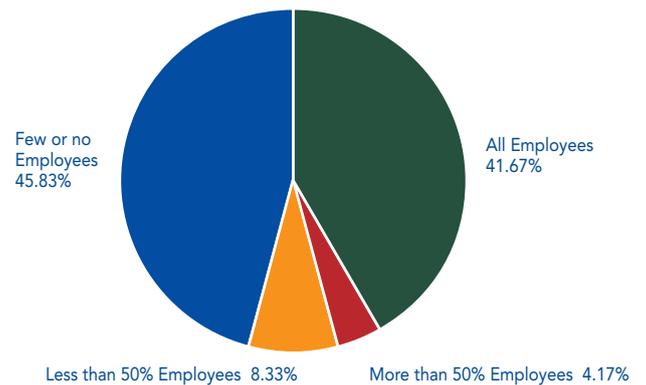
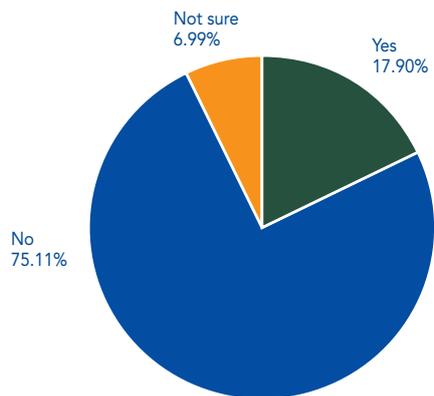


## America

- 19.05% of the respondents in America indicated that child care services are offered by their company.

## America

- 25.00% of the respondents in America believe that all employees have access to child care services.

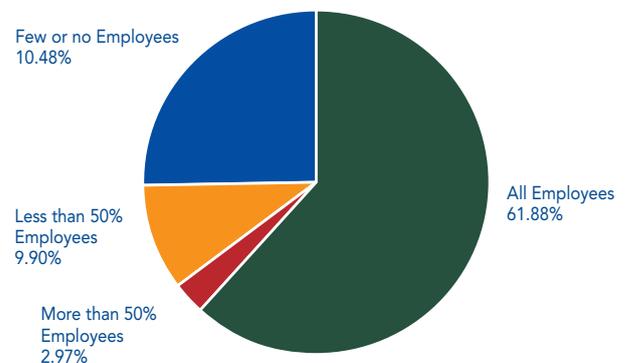
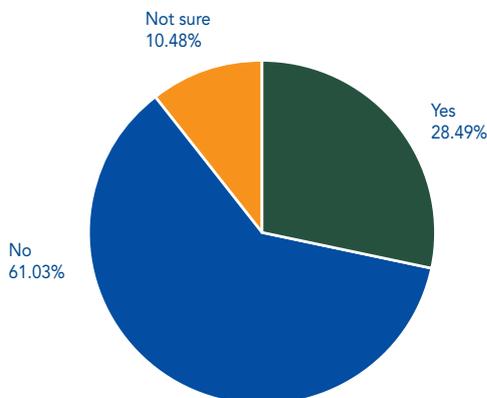


## Asia

- 17.90% of the respondents in America indicated that child care services are offered by their company.

## Asia

- 41.67% of the respondents in Asia believe that all employees have access to child care services.



## Europe

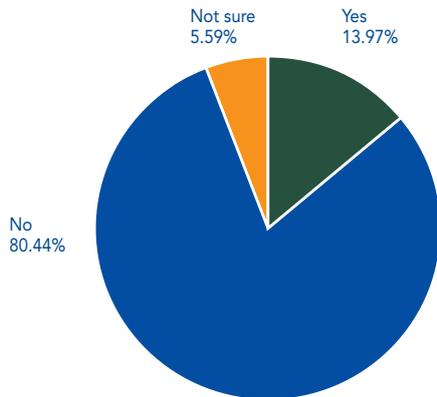
- 28.49% of the respondents in Europe indicated that child care services are offered by their company.

## Europe

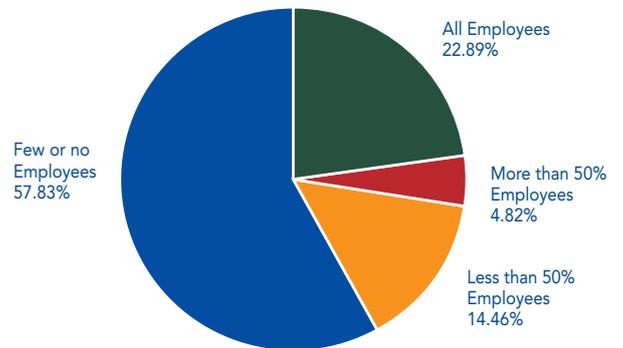
- 61.88% of the respondents in Europe believe that all employees have access to child care services.

# Benefits: Child Care

Is this offered by your company?



If yes, what % of employees have access to it?

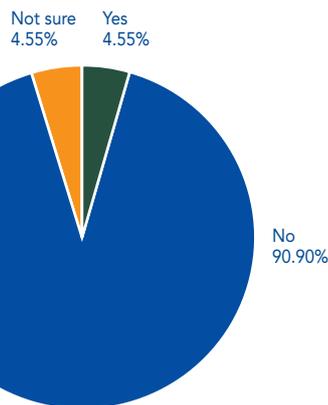


## Middle East

- 13.97% of the respondents in the Middle East indicated that child care services are offered by their company.

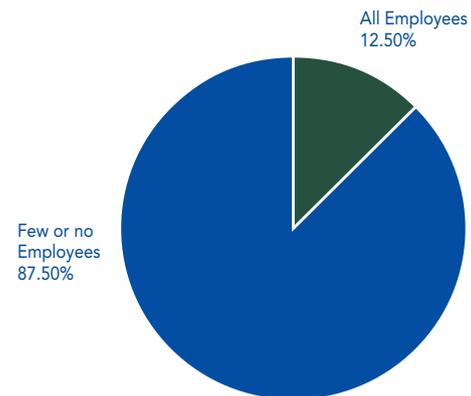
## Middle East

- 22.89% of the respondents in the Middle East believe that all employees have access to child care services.



## New Zealand

- 4.55% of the respondents in New Zealand indicated that child care services are offered by their company.

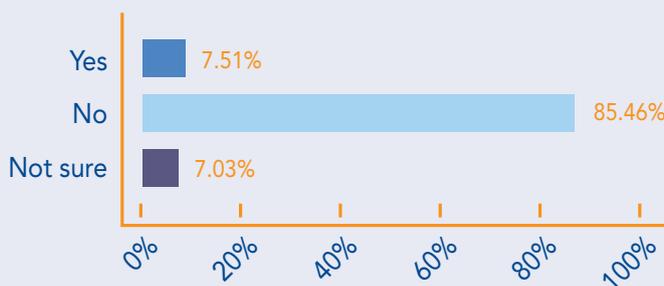


## New Zealand

- 12.50% of the respondents in New Zealand believe that all employees have access to child care services.

## Comparison to the 2007 results

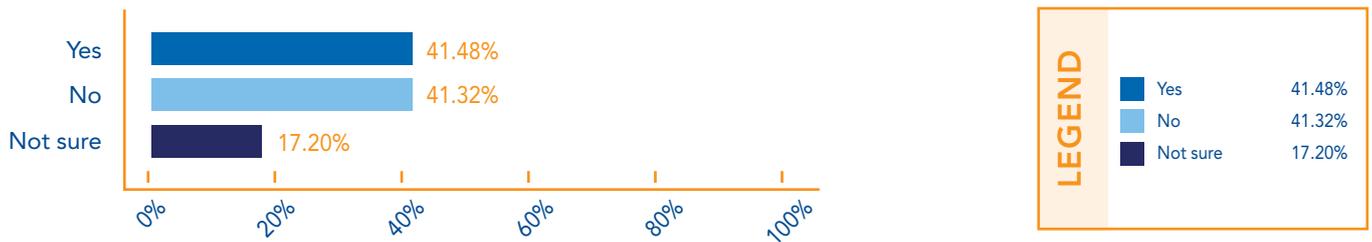
Is child care services offered by your company?



In the 2007 report 7.51% of the total respondents indicated that child care services were offered by their company. The 2008 results were 15.71%, showing a 8.20% increase.

# Non-Tangible Benefits

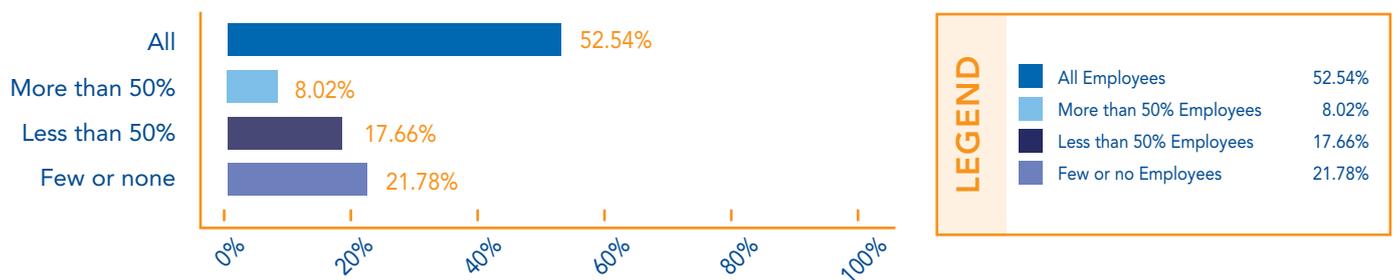
## Is Salary Sacrifice offered by your company?



### Overall Findings

- 41.48% of the total respondents indicated that salary sacrifice is offered by their company. This compares to 63.38% in the 2007 results.

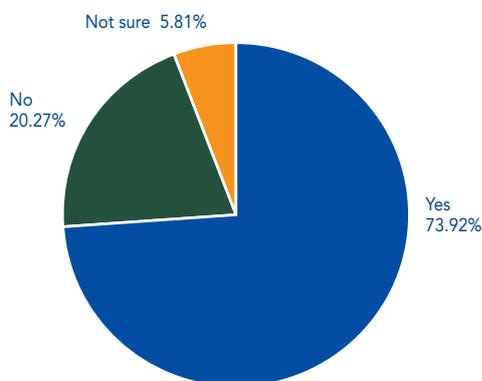
## If yes, what % of employees has access to Salary Sacrifice?



### Overall Findings

- 52.54% of the total respondents believe that salary sacrifice is offered to all employees within their company.

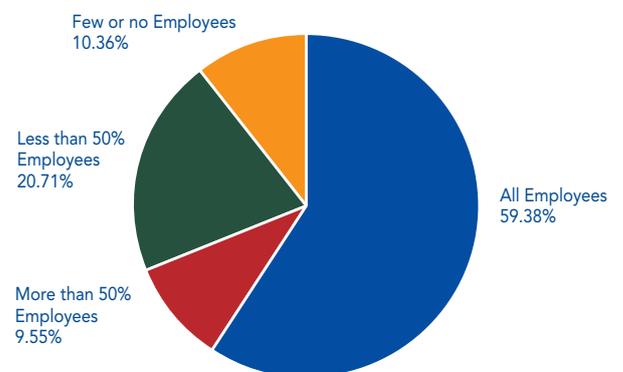
### Is this offered by your company?



### Australia

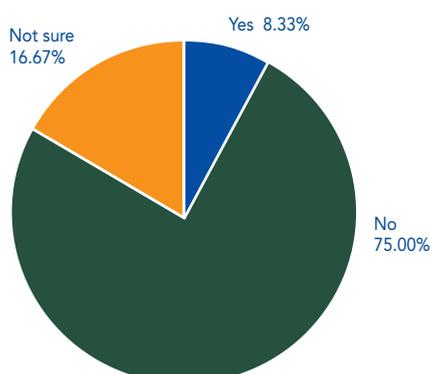
- 73.92% of the respondents in Australia indicated that salary sacrifice is offered by their company.

### If yes, what % of employees have access to it?



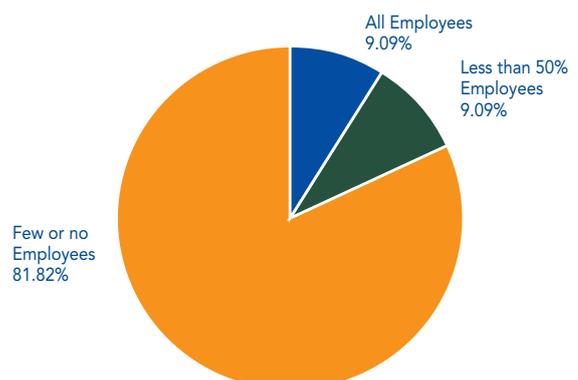
### Australia

- 59.38% of the respondents in Australia believe that all employees have access to salary sacrifice programs.



### Africa

- 75.00% of the respondents in Africa indicated that salary sacrifice is not offered by their company.



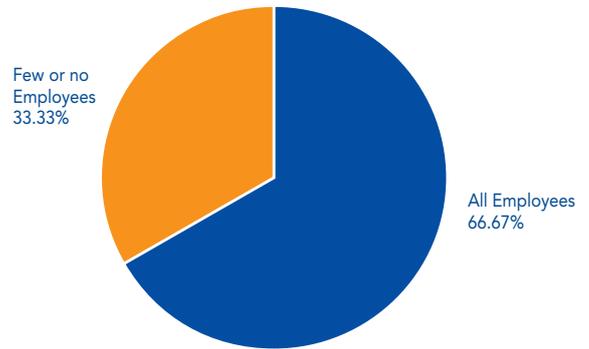
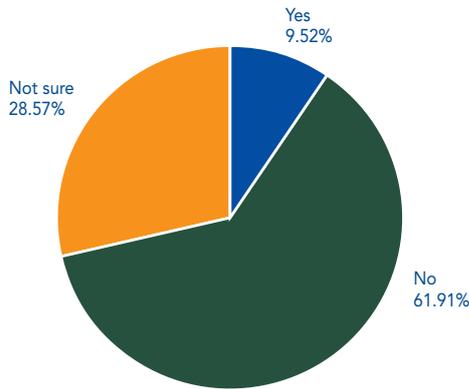
### Africa

- 81.82% of the respondents in Africa believe that few or no employees have access to salary sacrifice programs.

# Non-Tangible Benefits: Salary Sacrifice

Is this offered by your company?

If yes, what % of employees have access to it?

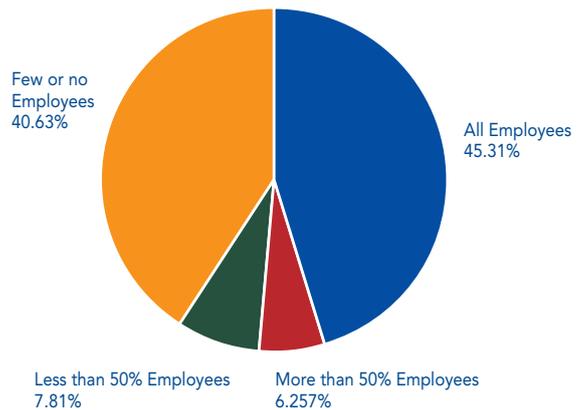
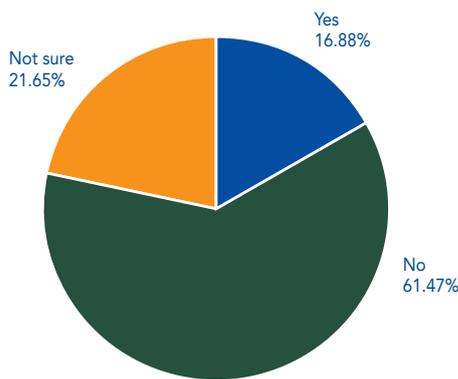


## America

- 61.91% of the respondents in America indicated that salary sacrifice is not offered by their company.

## America

- 33.33% of the respondents in America believe that few or no employees have access to salary sacrifice programs.

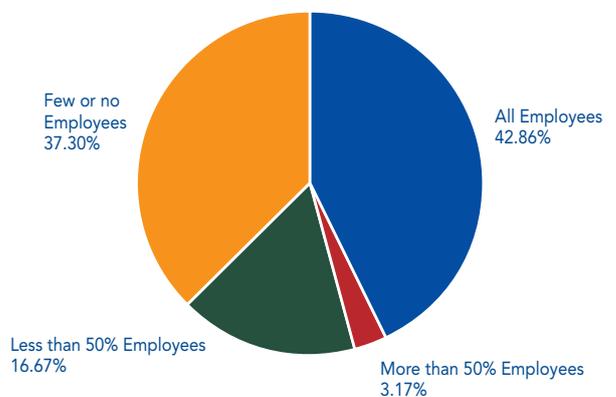
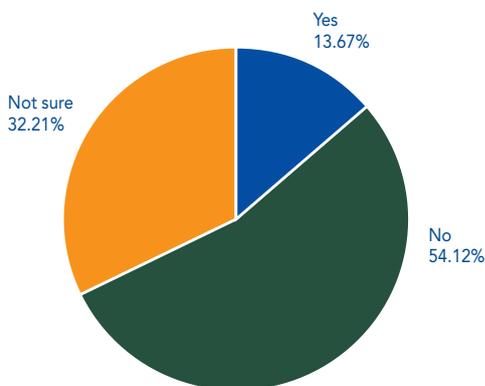


## Asia

- 61.47% of the respondents in Asia indicated that salary sacrifice is not offered by their company.

## Asia

- 40.63% of the respondents in Asia believe that few or no employees have access to salary sacrifice programs.



## Europe

- 54.12% of the respondents in Europe indicated that salary sacrifice is not offered by their company.

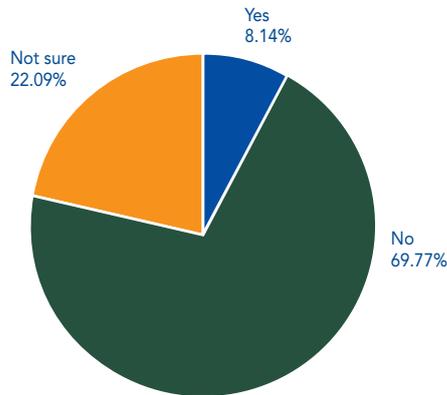
## Europe

- 37.30% of the respondents in Europe believe that few or no employees have access to salary sacrifice programs.

# Non-Tangible Benefits: Salary Sacrifice

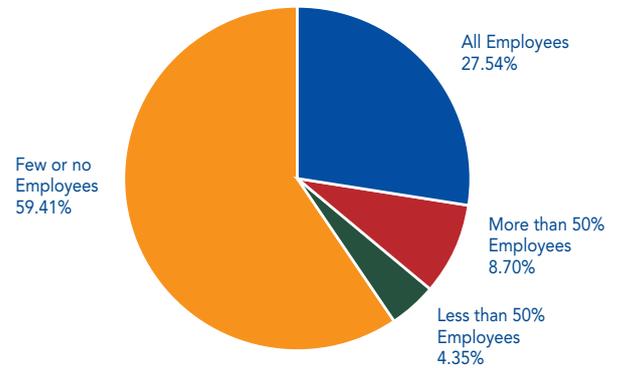
Is this offered by your company?

If yes, what % of employees have access to it?



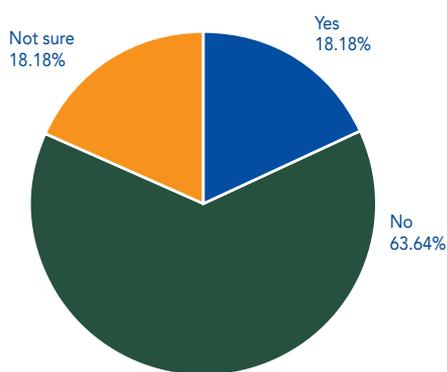
## Middle East

- 69.77% of the respondents in the Middle East indicated that salary sacrifice is not offered by their company.



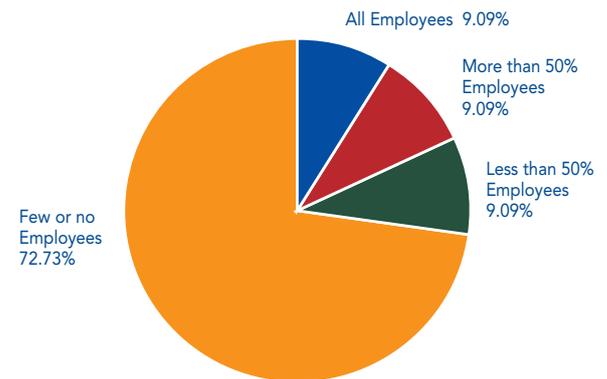
## Middle East

- 59.41% of the respondents in the Middle East believe that few or no employees have access to salary sacrifice programs.



## New Zealand

- 63.64% of the respondents in New Zealand indicated that salary sacrifice is not offered by their company.



## New Zealand

- 72.73% of the respondents in New Zealand believe that few or no employees have access to salary sacrifice programs.

Whilst the style of Salary Sacrifice programs varies, traditionally there is no restriction on the types of benefits that can be sacrificed. The important thing is that these benefits form part of employee remuneration, replacing what otherwise could have been paid as salary.

The types of benefits generally provided in salary sacrifice arrangements by employers include fringe benefits, exempt benefits and superannuation. A salary sacrifice program does not however suit every employee so talk to a financial planner to work out the best strategy for your lifestyle and working conditions.

# The Netherlands as a Supply Chain Centre

## Opportunities, Comparisons and Challenges

### Opportunities

As a result of the natural advantages the country has as a gateway to Europe via Rotterdam and Schipol, value-added Logistics and Transshipment, or Re-exporting, is already a large part of the Netherlands economy.

With population and related housing increases and the fact that most manufacturing now occurs outside of Europe, there is an ever-increasing stream of air and sea containers coming through our ports, from places such as China and elsewhere.

As a rule, the movement of manufacturing to China and other cheap labour countries, has meant that the Netherlands has lost low-value production capacity. More importantly it now has the opportunity to replace this with higher value-added services and production.

Not only is this an opportunity for the Netherlands to value-add to imports, but to also become the start of Supply Chains that expand into Europe.

In order to take advantage of the opportunities there needs to be significant cooperation between companies and the government to ensure the economic and tax climate, support the operational capacity of the skilled labour force in the Netherlands.

### Comparisons

- Labour is highly skilled with 40% of employees in the Netherlands holding at minimum a related Diploma; compared to 29% in the UK.
- Average wages in the Netherlands are higher compared to other parts of Europe.
- Average standard weekly working hours are longer than in France or Germany.
- The tax policy should be improved to meet that used in Ireland and Switzerland, to attract investment.
- Transport congestion is increasing and at times can lead to changes in company Supply Chains from the Netherlands to Belgium or Germany.
- Business in the Netherlands takes place using English more often; compared to other European countries.
- Education needs to be focussed, seen as interesting and world-leading, like at Cranfield University in the UK.

For the future, carbon footprint management issues need to be carefully considered by the government, compared with the rules imposed by neighbouring countries to ensure parity.

### Challenges

- Policy Alignment relating to Education, Infrastructure, Global Warming and Tax must take place.
- Business leaders must also find ways to ensure that a career in Supply Chain & Logistics is advertised and seen as interesting to new entrants coming from Universities. This will ensure the increasing skills their businesses need are attracted and retained by the industry.
- Competition from nearby countries such as Germany and Belgium and those further a field such as Poland and Hungary need to be monitored and met.
- Skills shortages need to be addressed through a flexible 'expat' policy and focussed training and education investments.
- Businesses need to add value through improved labour force flexibility, combined with innovative IT solutions and increased knowledge. This will ensure Supply Chains start in the Netherlands and move into Europe, especially in relation to complex and high value goods.

### Summary

The Netherlands will need to take some daring steps in order to protect its patch and expand its role to be leading and directing Supply Chains throughout Europe.

A vital ingredient will be how the key players in industry and government cooperate in the coming years to ensure the country can maximise its natural advantages whilst at the same time minimising its comparative disadvantages with regard to other countries in Europe who also have an interest in ensuring the Supply Chain Centre's of Europe reside with them.

Most importantly there needs to be a focus on understanding what is Supply Chain & Logistics and ensuring it is seen as an exciting industry to work in. It will be the skilled people of the Netherlands that will be needed to power the Supply Chains in order to take advantage of future opportunities in Europe.

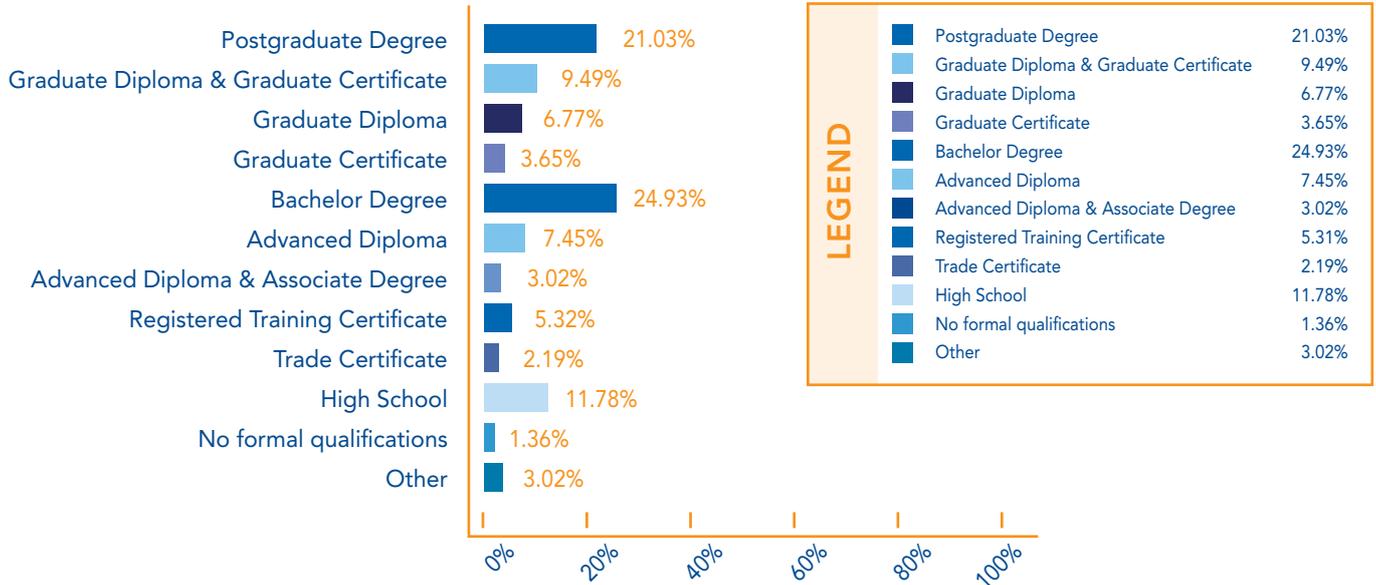


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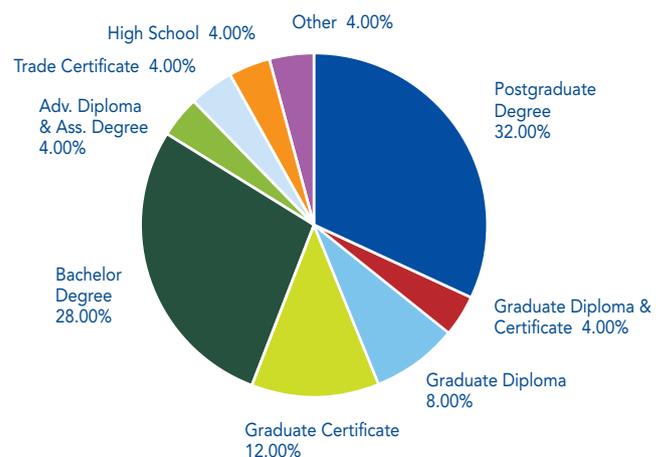
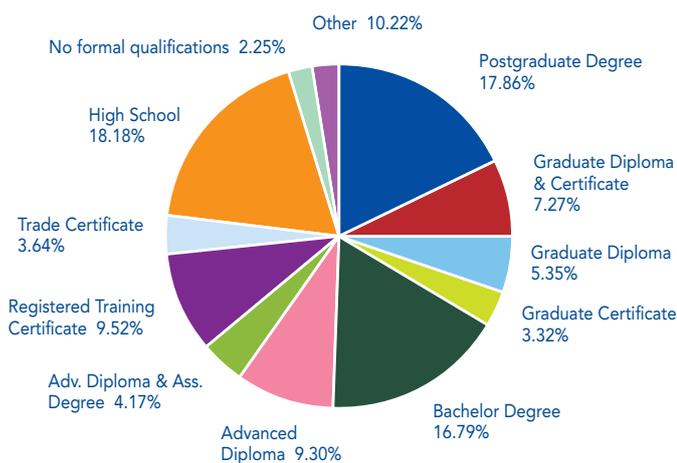
# Education & Qualifications

## What is the highest qualification that you have completed?



### Overall Findings

- 24.93 % of the total respondents indicated that they have completed a Postgraduate Degree.
- 21.03% of the total respondents indicated that they have completed an Undergraduate Bachelor Degree.



### Australia

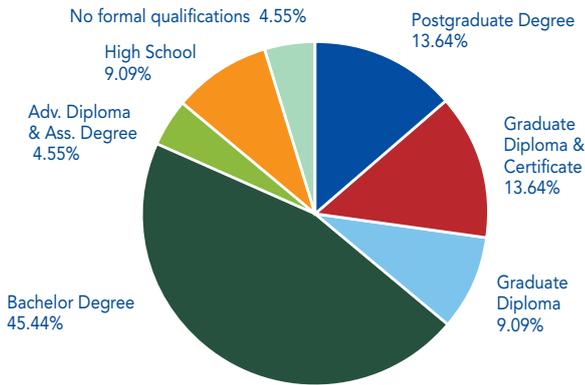
- 18.18% of the respondents in Australia indicated that they have completed High School education. 17.86% have completed a Postgraduate Degree.

### Africa

- 32.00% of the respondents in Africa indicated that they have completed a Postgraduate Degree. 28.00% have completed a Bachelor Degree.

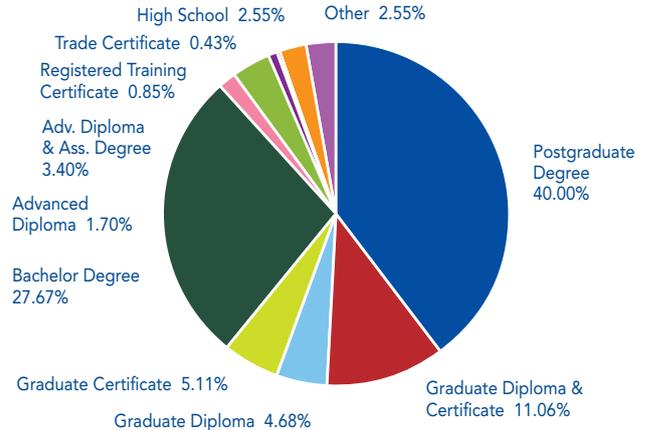
# Education & Qualifications

What is the level of the highest qualification that you have completed?



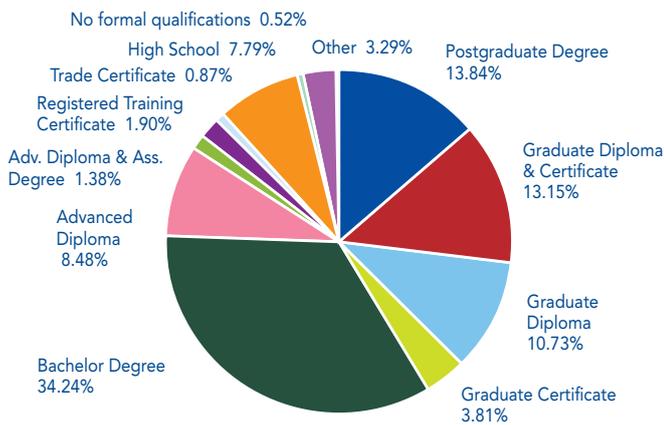
## America

- 45.44% of the respondents in America indicated that they have completed a Bachelor Degree. 13.64% have completed a Postgraduate Degree.



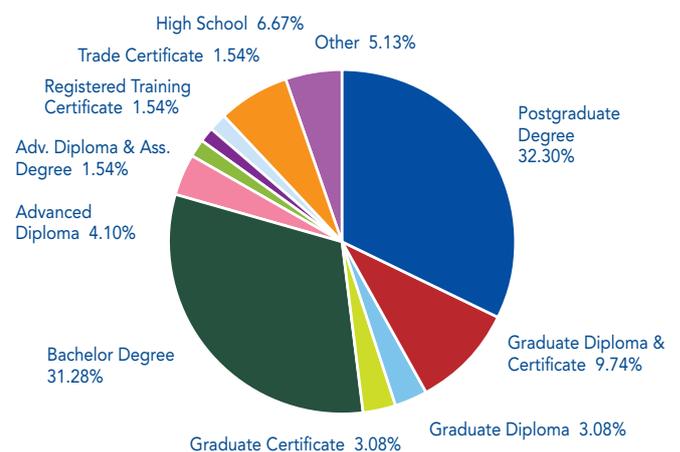
## Asia

- 40.00% of the respondents in Asia indicated that they have completed a Postgraduate Degree. 27.67% have completed a Bachelor Degree.



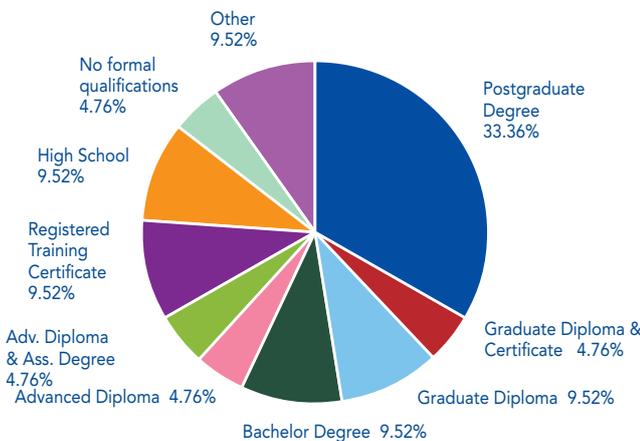
## Europe

- 34.24% of the respondents in Europe indicated that they have completed a Bachelor Degree. 13.84% have completed a Postgraduate Degree.



## Middle East

- 32.30% of the respondents in the Middle East indicated that they have completed a Postgraduate Degree. 31.28% have completed a Bachelor Degree.



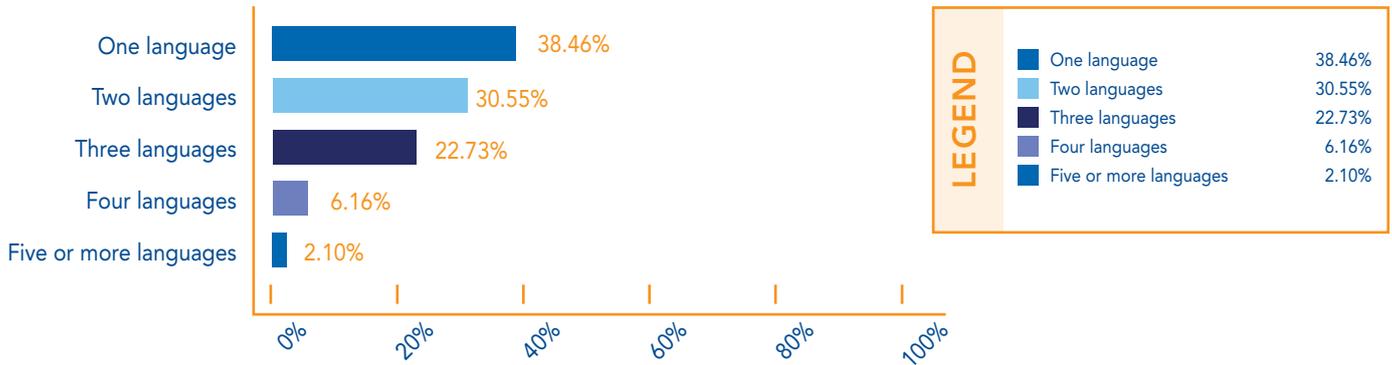
## New Zealand

- 33.36% of the respondents in New Zealand indicated that they have completed a Postgraduate Degree. 9.52% have completed a Bachelor Degree.



# Languages

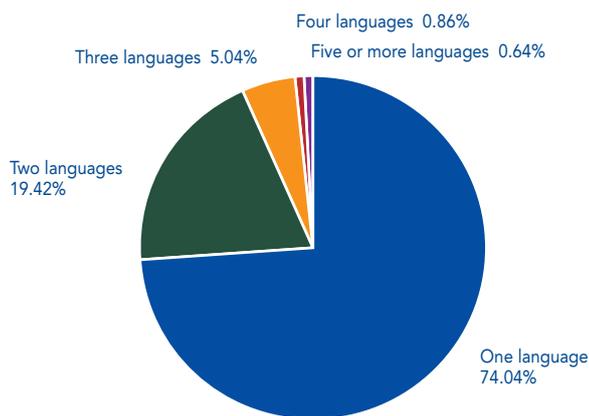
## How many languages are you fluent in?



LEGEND	
One language	38.46%
Two languages	30.55%
Three languages	22.73%
Four languages	6.16%
Five or more languages	2.10%

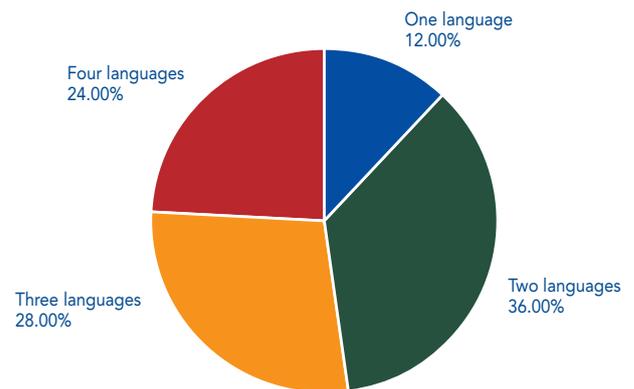
### Overall Findings

- 30.55% of the total respondents indicated that they are fluent in two languages.
- 22.73% of the total respondents indicated that they are fluent in three languages.



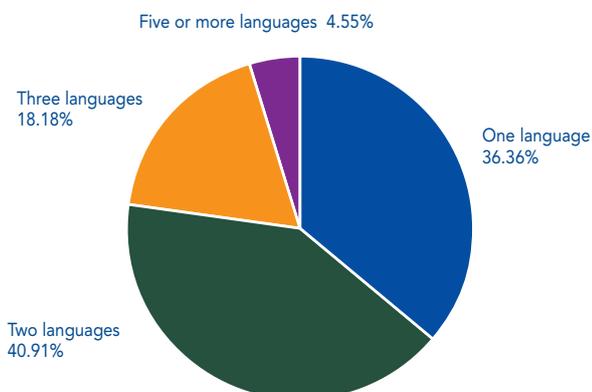
### Australia

- 74.04% of the respondents in Australia indicated that they are fluent in one language. 19.42% are fluent in two languages.



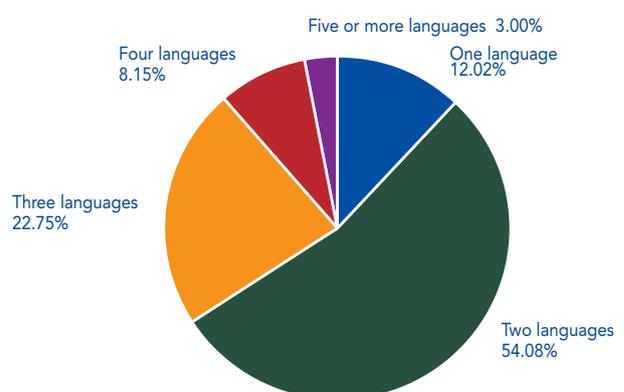
### Africa

- 36.00% of the respondents in Africa indicated that they are fluent in two languages. 28.00% are fluent in three languages.



### America

- 40.91% of the respondents in America indicated that they are fluent in two languages. 18.18% are fluent in three languages.

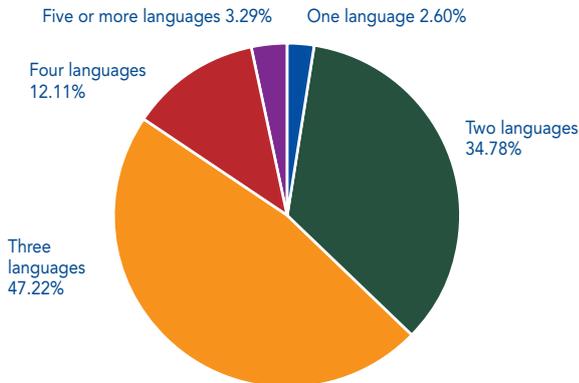


### Asia

- 54.08% of the respondents in Asia indicated that they are fluent in two languages. 22.75% are fluent in three languages.

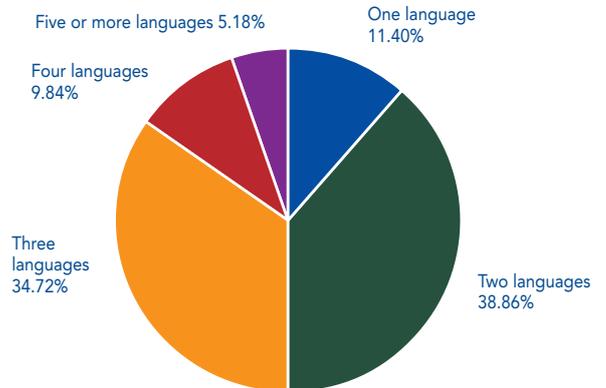
# Languages

## How many languages are you fluent in?



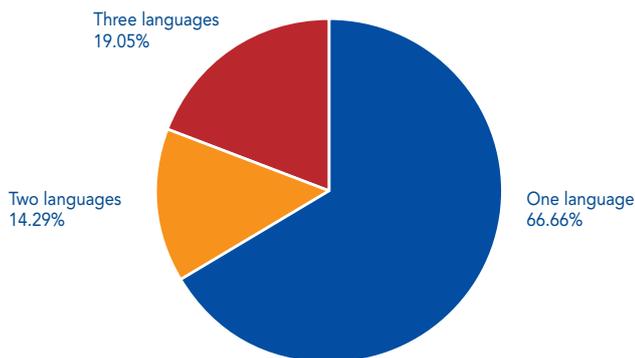
### Europe

- 47.22% of the respondents in Europe indicated that they are fluent in three languages. 34.78% are fluent in two languages.



### Middle East

- 38.86% of the respondents in the Middle East indicated that they are fluent in two languages. 34.72% are fluent in three languages.



### New Zealand

- 66.66% of the respondents in New Zealand indicated that they are fluent in one language. 19.05% are fluent in three languages.



## SUPPLY CHAIN ASIA

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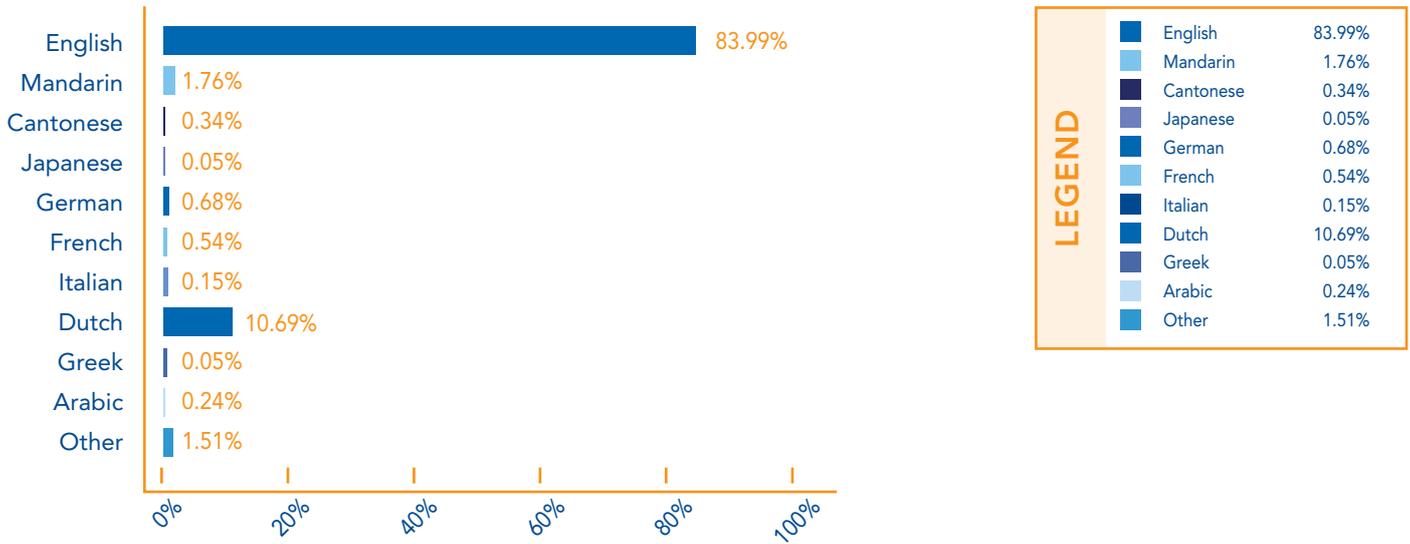
Supply Chain Asia is a community dedicated to bringing Supply Chain and Logistics professionals together in Asia. Our vision is to become a platform and a conduit that will bring these professionals all over Asia and the world together to **CONNECT, COMMUNICATE & COLLABORATE**. We also seek to collaborate and cooperate with other local, regional and global bodies of Supply Chain and Logistics institutions to enhance the networking and sharing efforts.

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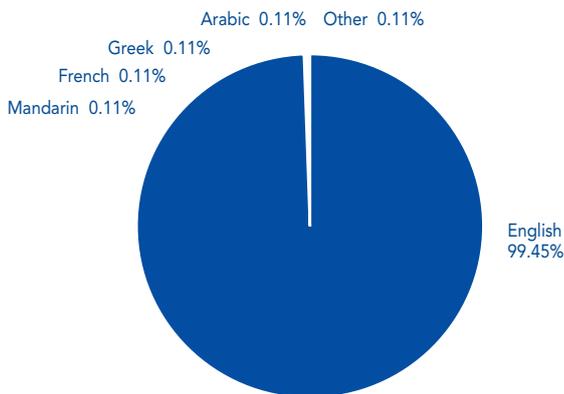
# Languages

## What is the predominant business language used in your company?



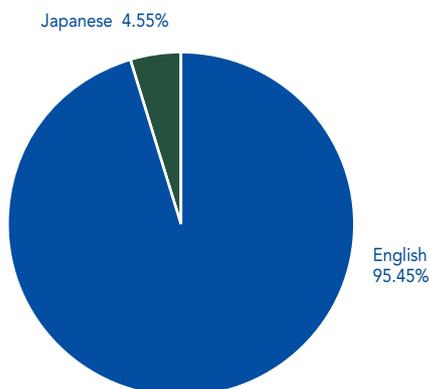
### Overall Findings

- 83.99% of the total respondents indicated that English is the predominant business language used in their company.



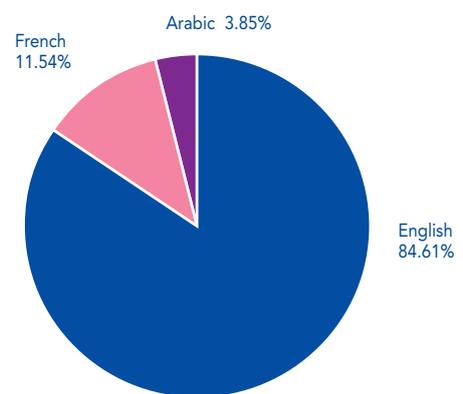
### Australia

- 99.45% of the respondents in Australia indicated that English is the predominant business language used in their company. 4.55% indicated that Japanese is used.



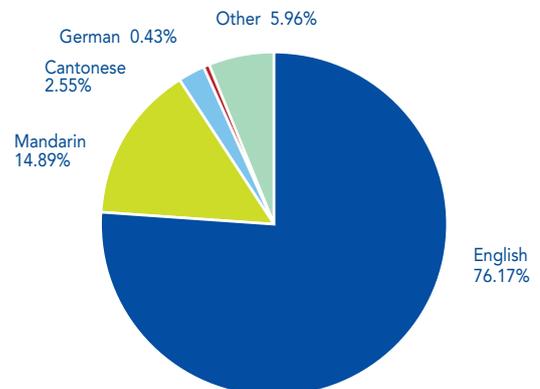
### America

- 95.45% of the respondents in America indicated that English is the predominant business language used in their company. 4.55% indicated that Japanese is used.



### Africa

- 84.61% of the respondents in Africa indicated that English is the predominant business language used in their company. 11.54% indicated that French is used.

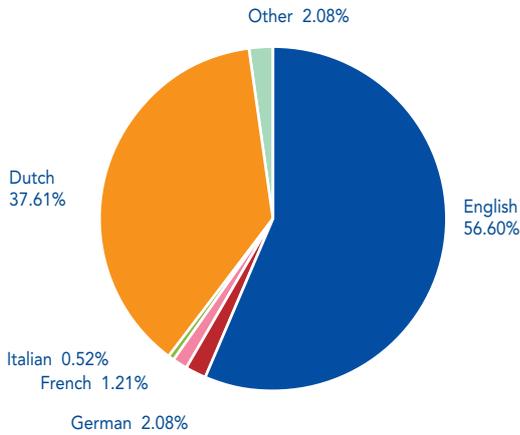


### Asia

- 76.17% of the respondents in Asia indicated that English is the predominant business language used in their company. 14.89% indicated that Mandarin is used.

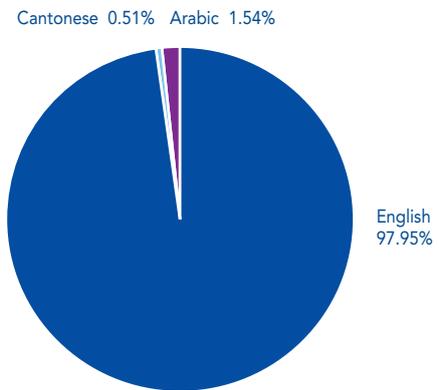
# Languages

What is the predominant business language used in your company?



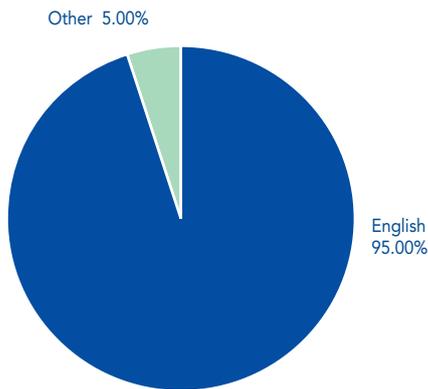
## Europe

- 56.60% of the respondents in Europe indicated that English is the predominant business language used in their company. 37.61% indicated that Dutch is used.



## Middle East

- 97.95% of the respondents in the Middle East indicated that English is the predominant business language used in their company.



## New Zealand

- 95.00% of the respondents in New Zealand indicated that English is the predominant business language used in their company.



# SupplyChainJobz.com

*Discover and be discovered*

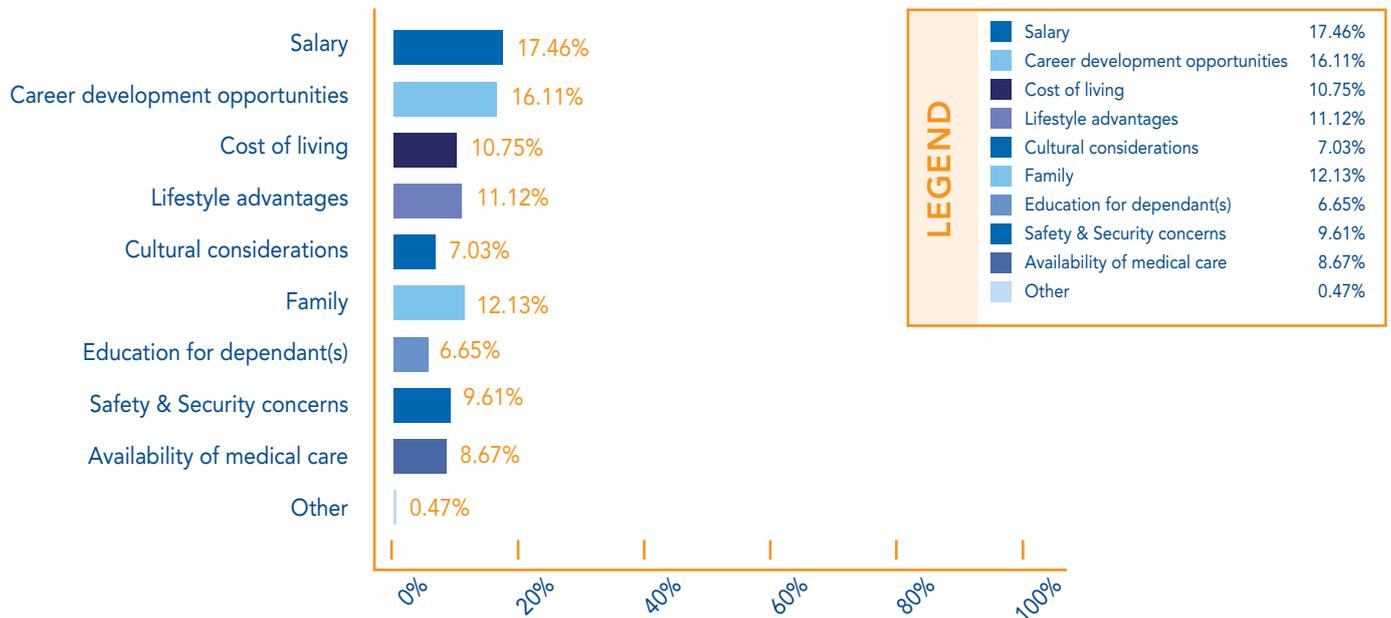
SupplyChainJobz connects employers with active job seekers globally. Benefits for employers include: receiving resume alerts, the ability to advertise positions and search resume databases daily.

Benefits for job seekers include: posting resumes automatically and matching available positions. Employers and Recruiters are automatically alerted to suitable candidates on a daily basis. Job Seekers have the ability to short-list their favourite job listings which saves employers, recruiters and candidates time.

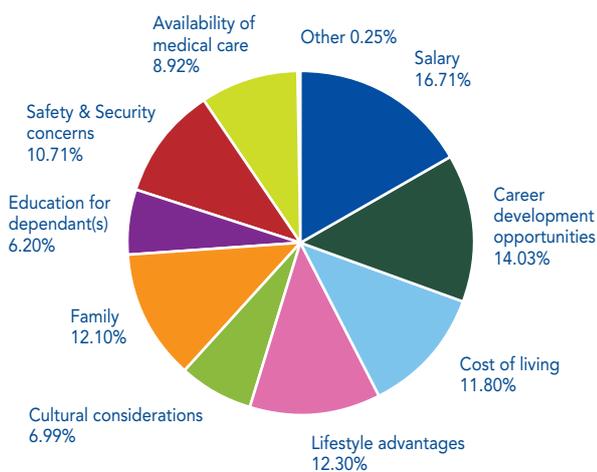
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# Career Relocation

What are the key issues you would consider prior to undertaking relocation?

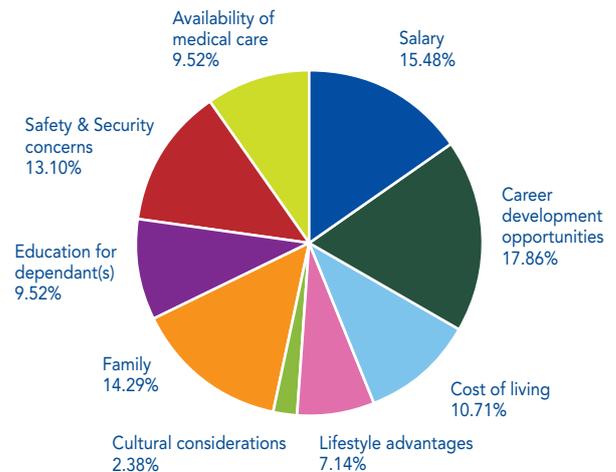


- Top four issues to consider**
- 87.31% of the total respondents would consider salary.
  - 80.54% of the total respondents would consider career development opportunities.
  - 60.65% of the total respondents would consider family.
  - 55.59% of the total respondents would consider lifestyle advantages.



## Australia

- 16.71% of the respondents in Australia indicated that they would consider salary as the key issue prior to relocation.

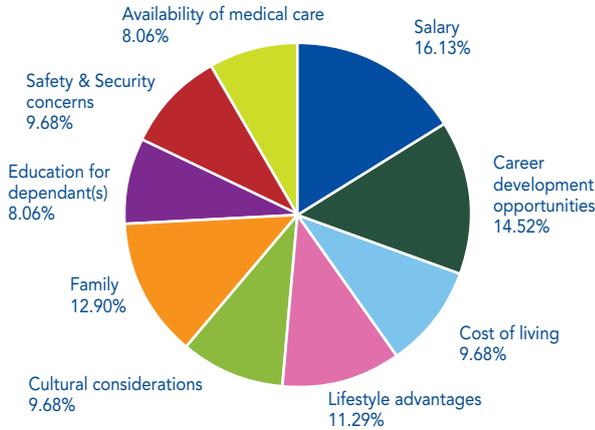


## Africa

- 17.86% of the respondents in Africa indicated that they would consider career development opportunities as the key issue prior to relocation.

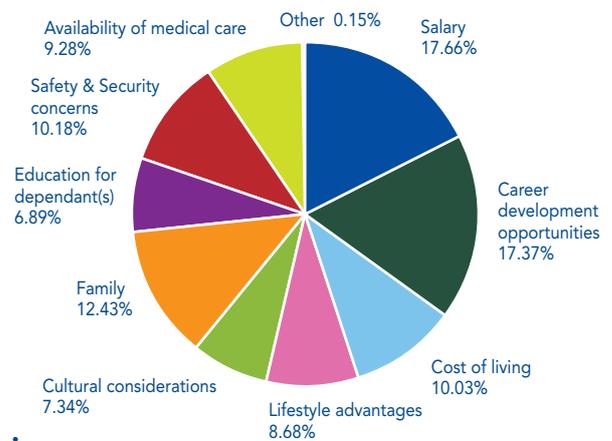
# Career Relocation

## What are the key issues you would consider prior to undertaking relocation?



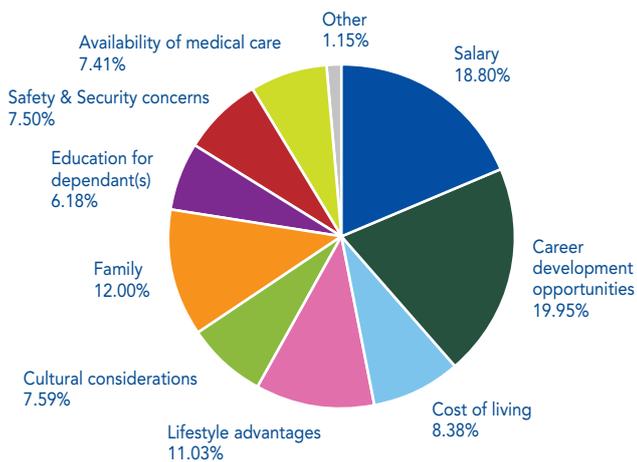
### America

- 16.13% of the respondents in America indicated that they would consider salary as the key issue prior to relocation.



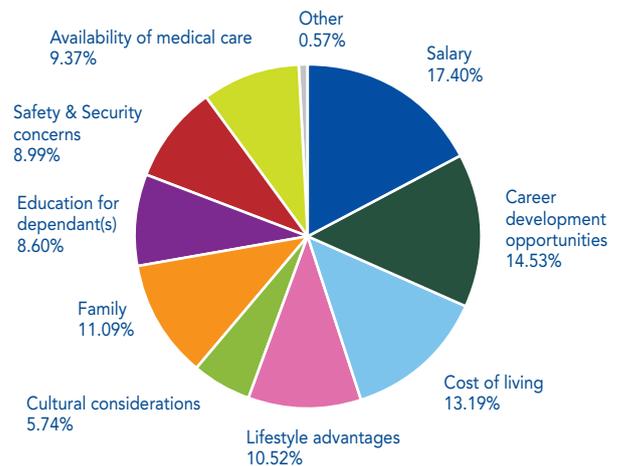
### Asia

- 17.67% of the respondents in Asia indicated that they would consider salary as the key issue prior to relocation.



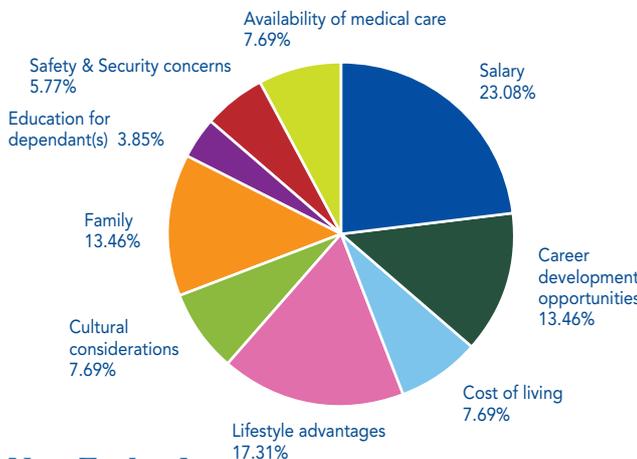
### Europe

- 19.95% of the respondents in Europe indicated that they would consider career development opportunities as the key issue prior to relocation.



### Middle East

- 17.40% of the respondents in the Middle East indicated that they would consider salary as the key issue prior to relocation.



### New Zealand

- 23.08% of the respondents in New Zealand indicated that they would consider salary as the key issue prior to relocation.



## The Middle East - a challenging market for employers

The Supply Chain and Logistics industry continues to suffer from skills shortages throughout the Middle East, with companies still struggling to attract talented personnel to the region. Despite somewhat looser restrictions on job mobility within some countries and a constant focus on finding locally based experienced staff - most employers still have to attract new employees from overseas. What then are some of the practical issues facing Middle East employers and how might they be resolved?

### Global competition for talent

The Middle East is no longer the honey pot it once was for expatriate staff. Without doubt, the region provides an exciting and challenging work environment and a good standard of living; but the traditional talent attraction strategy of providing excellent savings potential for employees is no longer true. In addition China, India and SE.Asia are all booming and offering viable alternatives for internationally mobile employees. India in particular has a huge requirement for Supply Chain and Logistics talent in the coming 5 years and with rising salaries in that market we are already seeing many Indian Nationals returning home for better prospects.

Whilst the answer is by no means clear, or even easy, there are alternatives that companies should be reviewing. Looking to new and non-traditional labour sources is one solution but more importantly, we need to develop local talent who can offer good academic, language and cultural skills in return for training and challenging careers. Those companies who develop real careers for Middle East Nationals will be the long term winners. Collaboration with Colleges & Universities based in the region is already happening, but we have a long way to go if we are to ensure a ready supply of locally educated talent for the industry.

### The US Dollar & Rising Cost of living

With the US Dollar pegged currencies many GCC companies find it difficult to attract overseas candidates who have seen both their home salaries and currencies advance against the Dollar in recent times. In addition, Gulf economies are experiencing inflation which has eroded most employee's ability to save. However the Middle East can offer other advantages, particularly as employee expectations are changing in the workplace. No longer is remuneration the only driving factor, as it probably was some 10 or 20 years ago. Quality of housing, an enjoyable lifestyle, affordable private schooling and even the climate are all still key factors for senior managers. Not to mention that most salaries are still tax free.

### Attracting the best people

Middle East employers have traditionally relied upon remuneration to attract good employees, but with global competition for talent this is no longer enough. Today the challenge is to offer interest, variety and satisfaction in the job, plus a clearly defined career path. In flat structures this can mean more focus on evolving roles and involvement in key projects rather than promotion. International transfers, especially back home into a senior position, are of key interest to expatriate employees.

Spending time on hiring the best candidate will always benefit your company over the long-term. This starts with selling the right story to the candidates. They need to have a clear idea about the company with no surprises. With a scarcity of experienced talent it also means looking for candidates who demonstrate the right mind-set and attitude to making the job a success.

Do not write off older candidates that may be in their 50's as they can bring experience and stability to the team

and often cost less - having no school requirements or a need for 5 bedrooms.

### Develop a clear Talent Retention strategy

Companies are quick to talk about career development, performance management and communication, which are obviously important. However, few walk the talk. Successful companies in the region have developed a culture where people feel engaged with the organisation and are willing to give a little more.

A good working environment, flexible working practises, involvement in key development projects and a positive & supportive management style all come into the equation. Companies should pay attention to what drives each individual if they want to get the best out of them. Middle East employees are no different from elsewhere in wanting well-defined opportunities to progress, training and regular appraisals linked to remuneration.

### Remuneration structure

Traditionally the expatriate package included free accommodation, transport, schooling - meaning that much of the salary could be saved. With the advent of cash-only packages, usually not index linked, the propensity to save has been eroded. To rectify this, many employers simply increase the cash package on an annual basis. The real answer lies in more innovative remuneration structures.

A key issue is the annual bonus, usually just an arbitrary one or two month's salary with no real linkage to personal or company performance. The solution is simple but rarely applied - generate job specific KPI's that are measurable, realistic, and achievable within specified timeframes for all staff. Then link bonuses to the KPI's and review regularly. There are Companies that do this well and have seen the resulting benefits to their bottom line from a motivated and stable team - but they are the minority in this region.

### The hiring process

As the industry becomes increasingly competitive, the ability to recruit and retain the right talent can make the difference between success and failure. Companies should understand the importance of implementing the right procedures to ensure a successful recruitment process from start to finish. In particular, be professional and keep things moving as delays equals lost candidates (an increasingly frequent occurrence). Above all, use a professional recruiter with experience in the Supply Chain and Logistics industry and in the region - not just the cheapest.

If the Middle East wants to become world class then we need to adopt world class techniques to attract and retain talent. Developing clear strategies for Talent Acquisition & Talent Retention is a must. As is the need to allocate sufficient resources to managing that talent, especially the recruitment process.



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# Logistics Recruitment

## Scope of service

**L**ogistics Recruitment has a demonstrated track record in the delivery of the highest level of professional services to our clients. Our coverage of a full spectrum of positions within the Supply Chain and Logistics sectors

we serve has set us apart in the market.

Our specialist recruitment team works hard to understand your business, core values, company culture and unique requirements when undertaking all assignments.

A specific recruitment strategy is formulated to ensure we attain the highest calibre candidates for the role. We cover the full Supply Chain and Logistics vertical from Senior Executive to entry level positions.



### Additional Services Offered

Logistics Recruitment provides a number of integrated recruitment solutions and value added services to support the implementation of corporate strategic objectives.

Our 'value-added' services include:

- Executive & Perm Recruitment
- International & Executive Search
- Managed Recruitment Services
- Supply Chain Consulting
- Contractors & Project Management
- HR advice and support
- Recruitment Training for Managers
- Outplacement / Career transition
- 'My Profile' Behavioural Analysis
- Salary benchmarking & market guides
- Psychological Assessment & testing
- Volume related recruitment projects

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