Wage Index

Sector Analysis of the Netherlands

Prepared by the

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Their international staff consists of some 100 specialists spread over the whole world. The foundation has strong relationships with Monster since 2003. The WageIndicator Foundation is a global organization reaching millions on a monthly basis. For more information please visit: WageIndicator.org. WageIndicator Foundation has offices in Amsterdam (HQ), Ahmedabad, Bratislava, Buenos Aires, Cape Town, Dar es Salaam, Maputo and Minsk.
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Executive summary and key findings

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

(i) Agriculture, forestry, fishing

(ii) Construction, technical consultancy

(iii) Education, research

(iv) Financial services, banking, insurance

(v) Healthcare, caring services, social work

(vi) Hospitality, catering, tourism

(vii) Manufacturing

(viii) ICT services

(ix) Legal and market consultancy, business activities

(x) Transport, logistics

Levels as well as annual changes in key characteristics are studied in six focus areas:

a) gross hourly wage and bonuses,
b) gender pay gap,
c) working hours and overtime,
d) restructuring expectations and restructuring in the past 12 months,
e) satisfaction with work in detail and
f) satisfaction with life as-a-whole.

In the second chapter, we focus on developments in two sectors, Information and communication and Financial and insurance activities in the period from 2006 to 2013.

Finally, in the third and final chapter, this report aims to compare wages on the worldwide basis in the last chapter. It focuses on 4 occupational groups across (up to) 23 countries:

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

Some of the main findings include:

- Respondents reported lower wages than in 2012 in all sectors, signalling continued adverse effect of the crisis on the Dutch labour market. The highest earners worked in the fields of Education and research with hourly gross wage of 16.4€ and Manufacturing, earning 16.4€. The lowest paid sector was hospitality, catering and tourism with average gross hourly income of 10.4€. The highest drop in wages was recorded in the ICT sector, where average reported wage fell by 8.5% in comparison with 2012. On the contrary in the hospitality, catering and tourism sectors the observed decrease of average wage was just 1%.
- Bonus structure remained largely stable. In addition to the vacation bonus received almost universally, nearly 40% of workers in education and research sector and in the healthcare sector received the end of the year bonus. Performance bonus was received by more than 20% of workers in finance and in legal, market consultancy and business sector.
- More detailed look at the structure of wages in the different sectors shows significant horizontal differences in pay, much higher than those recorded between different sectors. The best paid of all groups are professionals in Finance and Manufacturing. Meanwhile, workers performing elementary occupations in healthcare, catering and tourism sectors earn the least.
- In the horizontal structure we can also see differences in terms of pay between men and women. Generally speaking men earn more than women. The issue seems to be the most pronounced among service and sales workers, while clerical and support positions tend to pay nearly equally regardless of the gender.
- 2013 brought rise of part time, non-permanent contracts. Part time work is typical in particular for the healthcare, caring services and social work sector, while workers in hospitality, catering and tourism are most likely to have temporary contracts. Manufacturing, on the other hand, is dominated by full-time workers with permanent contracts. Hospitality workers are the most prone to working shifts or to have irregular working hours and to work during evenings and weekends. Construction and technical consultancy workers, on the other hand, appear to be the most likely to stick to standard working hours. In most sectors, overtime work is either compensated with extra time off in lieu of overtime working hours or not compensated at all.
- Redundancies being announced at their workplace were reported chiefly by Finance workers, among which 60% of experienced layoff. Such development had the smallest spread in the agriculture sector, where it was reported by 26% of workers. ICT sector was the only one where the majority of respondents expressed trust in competence of their management. In hospitality it was only a quarter of respondents who trusted in the management strategy of their employer. Training opportunities were the most common in Finance and the least common in hospitality. The ICT sector was also the one where new strategic initiatives were the most common, while the hospitality sector was the one in which they were the least common.
- Most workers in all sectors expect to stay with their employer for the next 12 months, although in the hospitality sector it is only a slight majority. In the agriculture sector, on the other hand, 84% of workers expect to remain employed at the same place they work

now. Healthcare and social care workers are the most afraid to be made redundant, while the agricultural workers are the least prone to expect to be laid off.

- The majority of Dutch workers in all sectors are satisfied with their jobs, although in the hospitality sector it's only a slim majority (52%). Manufacturing workers and workers in the healthcare and social care sectors are the most satisfied (64%). About 90% of Dutch workers regardless of the sector expressed satisfaction with life.

Table of Contents

Introduction and definitions 9

1 SECTORAL COMPARISON 12

1.1 Agriculture, forestry, fishing 16

1.2 Construction, technical consultancy 20

1.3 Education, research 24

1.4 Financial services, banking, insurance 28

1.5 Healthcare, caring services, social work 32

1.6 Hospitality, catering, tourism 36

1.7 ICT services 40

1.8 Manufacturing 44

1.9 Legal and market consultancy, business activities 48

1.10 Transport, logistics, communication 52

2 MAIN SECTOR DEVELOPMENTS 2006 – 2013 56

2.1 ICT services 56

2.2 Financial services, banking, insurance 57

3 WORLDWIDE COMPARISON OF OCCUPATIONS IN 2013 59

APPENDIX 64

Introduction and definitions

The main purpose of this 3rd annual Loonwijzer – Monsterboard Wage Index is to describe some of the key characteristics of the workforce in ten selected sectors of the Dutch labor market. We study the following sectors[1]: (a) Agriculture, forestry, fishing, (b) Construction, technical consultancy, (c) Education, research, (d) Financial services, banking, insurance, (e) Healthcare, caring services, social work, (f) Hospitality, catering, tourism, (g) Manufacturing, (h) ICT services, (i) Legal and market consultancy, business activities, (j)Transport, logistics.

These sectors are based on the main activity of the company or institution respondent works for, rather than the tasks performed by the respondent, which were the basis for the previous two WageIndex reports. A programmer working for a hospital will be, therefore, assigned to the healthcare sector, rather than to ICT.

Changes in sector definitions from previous WageIndex reports:

2013	2014
Agriculture, nature, animals, environment	Agriculture, forestry, fishing
Construction, fittings and housing,	Construction, technical consultancy
Education, research and training	Education, research
Finance, banking and insurance	Financial services, banking, insurance
Health care, paramedics and laboratory	Healthcare, caring services, social work
Hospitality, tourism, leisure and sports	Hospitality, catering, tourism
Industrial production, manufacture and metal	Manufacturing
IT, automation and telecommunications	ICT services
Marketing, PR and advertising	Legal and market consultancy, business activities
Transport, logistics, ports and airports	Transport, logistics, communication

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

In the second chapter, we focus on developments in the two main sectors (1. Information and communication, and 2. Financial and insurance activities) in the period of years 2006 – 2013.

The report compares wages on a 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.

[1] Unlike previous years, we no longer group occupations according to their names, but rather base our analysis on the self-reported sector of the labour market.

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 185,000 completed questionnaires in the WageIndicator Salary Survey (www.loonwijzer.nl) and the WageIndicator Salary MiniSurvey during the period of years 2012 - 2013.[2] Worldwide comparison draws on the international dataset of WageIndicator (2012-2013) and analyses wages of nearly 613,000 survey participants across the world.

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

Gross hourly wage and bonuses – Gross hourly wage, for our purposes, is computed from weekly hours, the wage period and the gross wage minus bonuses. We report the median 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.

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

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

It can be interpreted as a percentage difference between female and male median wages. It is computed for major occupational groups and based on data for the period 2012 – 2013 (without annual comparison).

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 evenings and ways of overtime compensation.

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 to stay with their current employer in the next 12 months, eagerness to get promoted, expectations of changes in their work responsibilities, redundancy of their post, pay rise, eagerness to find a new job, and expecting computer training, or unstable and uncertain income.

Satisfaction with work in detail – This variable is measured by the rate of satisfaction with the job, wage, commuting time, the combination of work and family life, job security, the working environment, working hours, colleagues, superiors, employer's approach to pay, allowance/bonuses

[2] For more information about structure of the Dutch sample, see the Appendix of this report.

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.

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

1 Sectoral comparison

Given the continuous negative effects of the economic crisis, perhaps not surprisingly the respondents of the WageIndicator survey in the Netherlands reported receiving lower wages in 2013 in comparison with the previous year. Banking and ICT services along with agriculture were affected the most; while the hospitality, catering and tourism sector was relatively unaffected. The highest wages were enjoyed by the workers in the manufacturing sector, followed by ICT and education (see Table 1).

Table 1: Median gross hourly wage

Sector	Year		% change
	2012	2013	
Agriculture, forestry, fishing	13.7	12.8	-7%
Construction, technical consultancy	15.6	14.8	-5%
Education, research	17.3	16.4	-5%
Financial services, banking, insurance	16.5	15.2	-8%
Healthcare, caring services, social work	14.8	14.4	-3%
Hospitality, catering, tourism	10.5	10.4	-1%
ICT services	16.5	15.1	-8%
Legal and market consultancy, business activities	15.8	14.9	-6%
Manufacturing	17.3	16.3	-6%
Transport, logistics, communication	14.2	13.3	-6%
50% highest income group	16.7	15.6	-7%
50% lowest income group	13.8	13.1	-5%
Total	15.5	14.6	-6%

Source: WageIndicator (2012-2013), only employees taken into account

The decline of wages in our sample was accompanied with decreased incidence of low pay[3] across most sectors. Workers receiving less than 60% of median wages in the Netherlands were particularly prevalent in the hospitability, catering and tourism sectors, nevertheless the share of workers at the risk of poverty in these sectors declined to 22% in 2013 from 26% in 2012 (see Table 2).

[3] Employees at risk of poverty (low pay) are employees with basic gross hourly wage below the poverty line. For our purposes, the poverty line is defined as 60% of the median gross hourly wage in the Dutch labour market. Poverty line is at the level of 9.01€/hour in 2012 and 8.47€/hour in 2013.

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

Sector	Year of the survey	
	2012	2013
Agriculture, forestry, fishing	15%	13%
Construction, technical consultancy	7%	6%
Education, research	4%	3%
Financial services, banking, insurance	5%	5%
Healthcare, caring services, social work	9%	7%
Hospitality, catering, tourism	26%	22%
ICT services	6%	5%
Legal and market consultancy, business activities	6%	5%
Manufacturing	4%	4%
Transport, logistics, communication	10%	10%

Source: WageIndicator (2012-2013), only employees taken into account

There has been very little change in bonus payments structure. The end of the year bonus is commonly paid in Education and Research field as well as in healthcare (36% and 37% respectively in 2013). Meanwhile about 20% of workers in the sectors such as finance, ICT, legal and market consultancy and manufacturing reported receiving performance bonus (see Figures 1 and 2).

Figure 1: Percentage of employees receiving end-of year-bonus across sectors

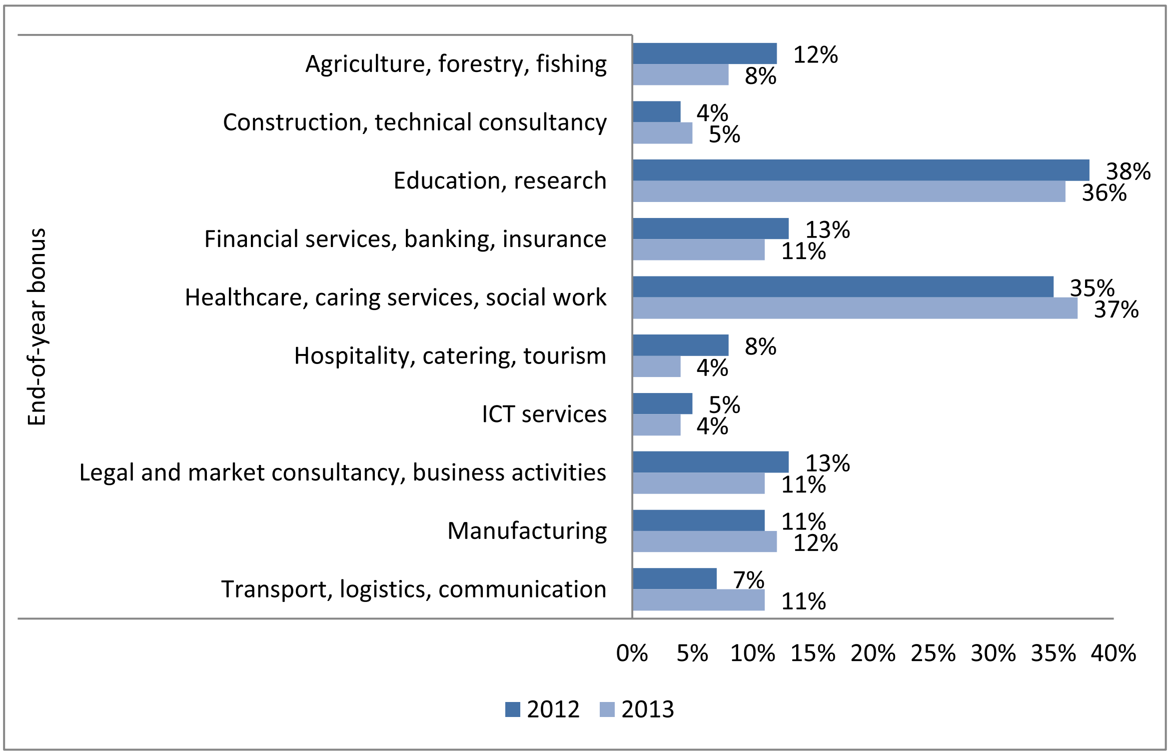
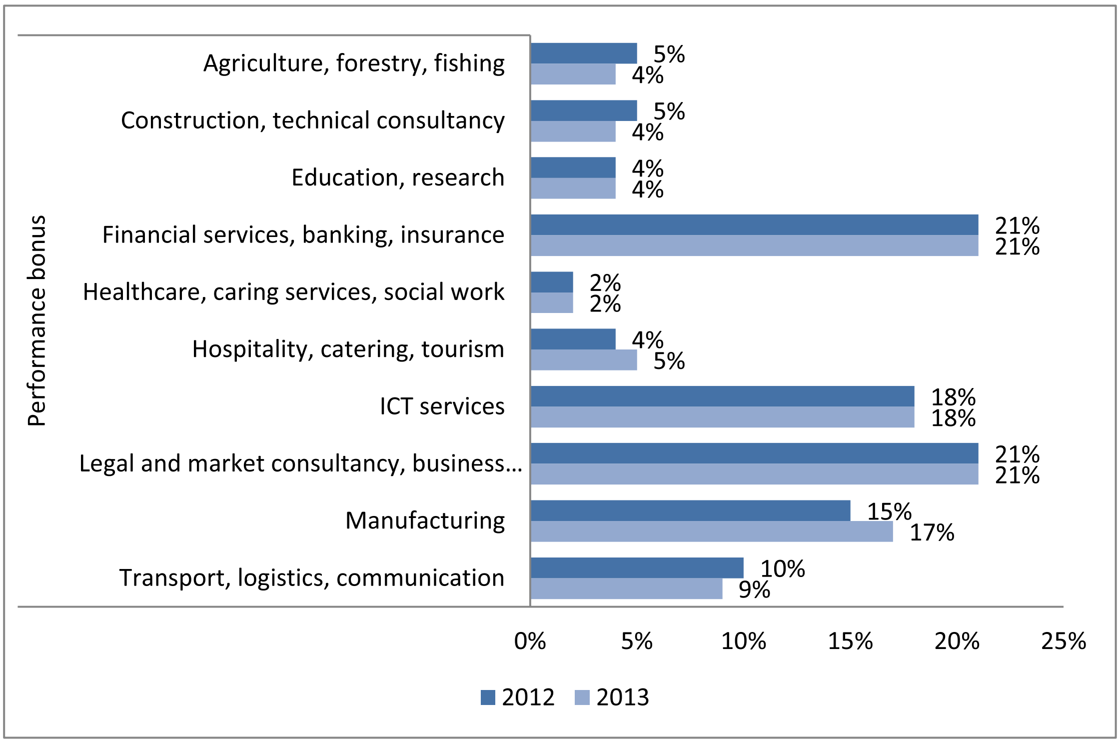


Figure 2: Percentage of employees receiving performance bonus across sectors



Workers in ICT felt the most satisfied with the security of their jobs; 80% of them reported being satisfied in this regard, slightly up from 79% in 2012. Workers in agriculture, hospitality and transportation felt the least satisfied. Only about 60% of workers in these fields felt safe in their job and the satisfaction decreased by 4% in transportation, 5% in hospitability and 8% in agriculture in comparison with 2012. Workers in Hospitality, catering and tourism and Manufacturing were the most likely to look for another job in the next 12 months. 61% of them expressed willingness to do so in 2013. On the other hand, only 39% of ICT workers were willing to look for a new job (see Figures 3 and 4).

Figure 3: Percentage of employees satisfied with job security across sectors

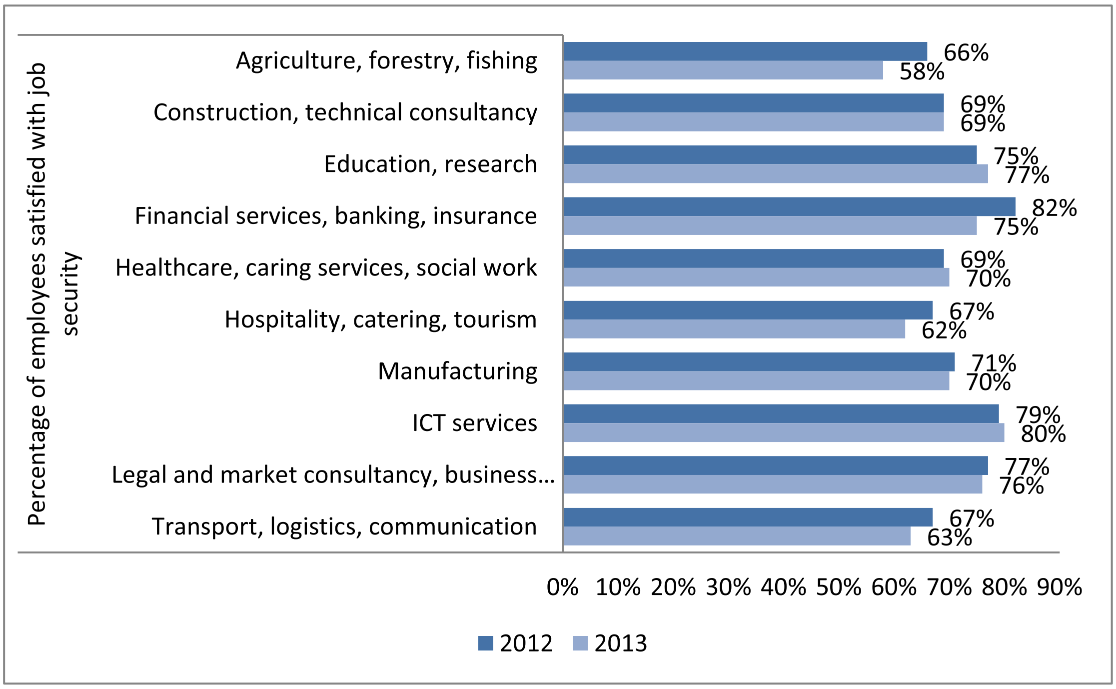
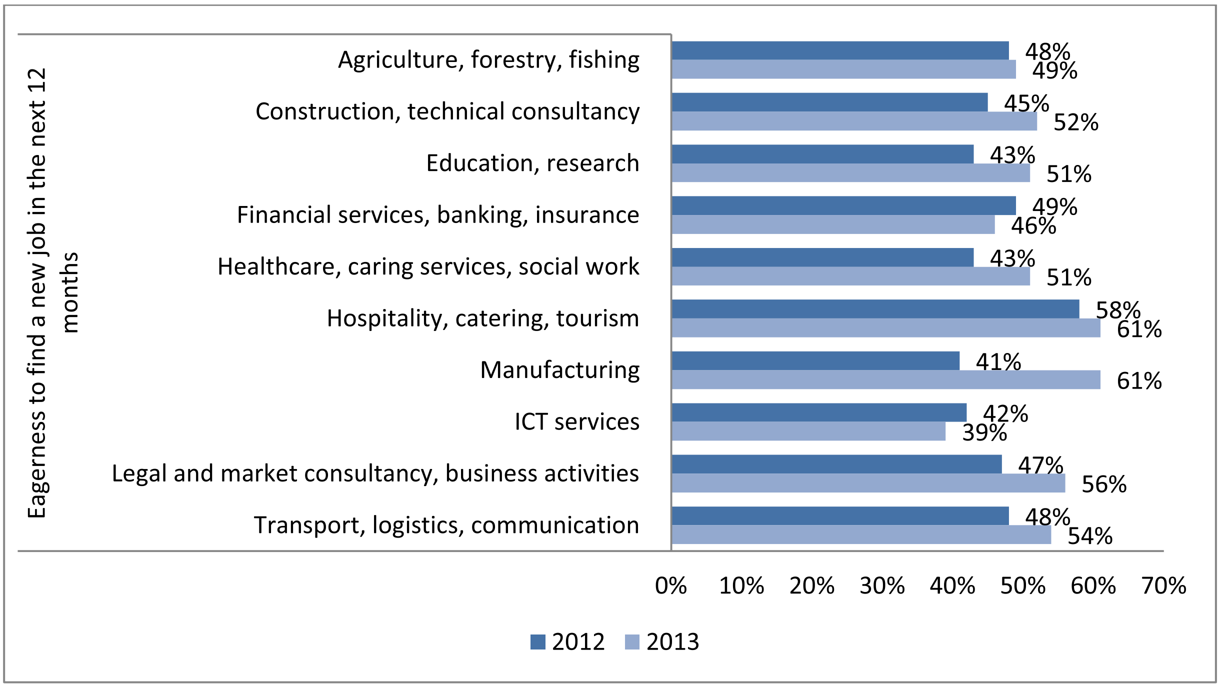


Figure 4: Percentage of employees expressing willingness to find a new job in the next 12 months across sectors



1.1 Agriculture, forestry, fishing

Summary

Our respondents in the agricultural sector reported receiving in average 12.8€ per hour, which is below the median earning in our dataset 6.6% less than the agricultural workers reported in 2012. Bonuses were also less common. The end of the year bonus was received by 8% of the respondents, down 4% in comparison with 2012 and only 5% of respondents benefited from profit sharing. In 2012, 7% of agricultural workers reported receiving the profit share bonus (see Table 3 and Figure 5).

The gender pay gap in agriculture is the most pronounced among workers in service and sales occupations, among which it reaches 37%. Among skilled agricultural workers. men earned 13% more than women. Other professional groups reported significantly smaller differences in pay (see Table 4).

22% more agricultural workers reported working shifts or irregular hours in 2013 in comparison with the situation in 2012. Workers with permanent contracts, on the other hand, became less permanent – 66% of our respondents reported having such contract, an 8% decline from 2012. About 40% of agricultural workers worked regularly Saturdays and evenings. Sunday work, however, was not very prevalent and is relevant only for 14% of workers. Extra work was most commonly (46%) compensated with extra time off (see Table 5 and Figure 6).

26% of respondents in the sector reported redundancies being announced in their company (up 8% from 2012), while training opportunities, mergers, renewal of equipment and trust in competent management strategy were all down rather sharply. Despite this development, food producers look into 2014 with cautious optimism. An overwhelming majority of them sees themselves working for the same employer (84%) and receiving promotion (73%) in the near future, both up from 2012. Meanwhile, they fear being made redundant or having to get by with unstable and uncertain income slightly less than they did in the previous year. Nevertheless they do not expect a pay rise or additional training. (see Table 6 and Figure 7).

Agricultural workers were less likely to be satisfied with their wage, their employer's approach to pay and in particular the bonuses, than in 2012. Only 16% of employers in the sector reported being satisfied with the allowances and bonuses, signifying a 41% decline compared to 2012. However, overall 90% of agricultural workers reported being satisfied with their lives (see Table 7 and Table 8).

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

Table 3: Median gross hourly wage

	Year	
	2012	2013
Median	13.7€	12.8€
Annual % Change		-6.6%

Figure 5: Overview of bonuses given to employees; percentage of employees

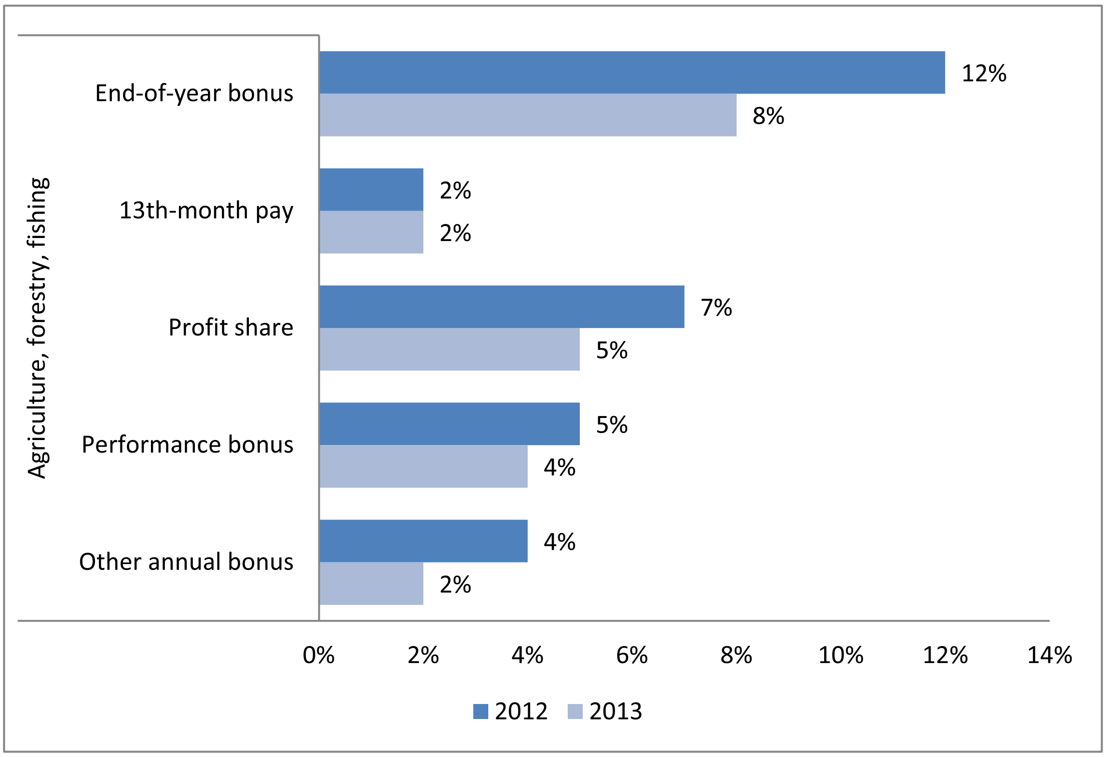


Table 4: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	18.2	17.3	5%
Technicians and associate professionals	15.6	14.2	9%
Clerical support workers	13.6	13.2	3%
Service and sales workers	14.0	8.8	37%
Skilled agricultural, forestry and fishery workers	11.5	10.0	13%
Elementary occupations	8.9	9.3	-4%

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

Table 5: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	72%	66%	-8%
Full-time working hours	79%	77%	-3%
Work shifts or irregular hours	32%	39%	22%
Regular work on Saturdays	40%	38%	-5%
Regular work on Sundays	15%	14%	-7%
Regular work in the evenings	37%	40%	8%

Figure 6: Overview of overtime compensation; percentage of employees

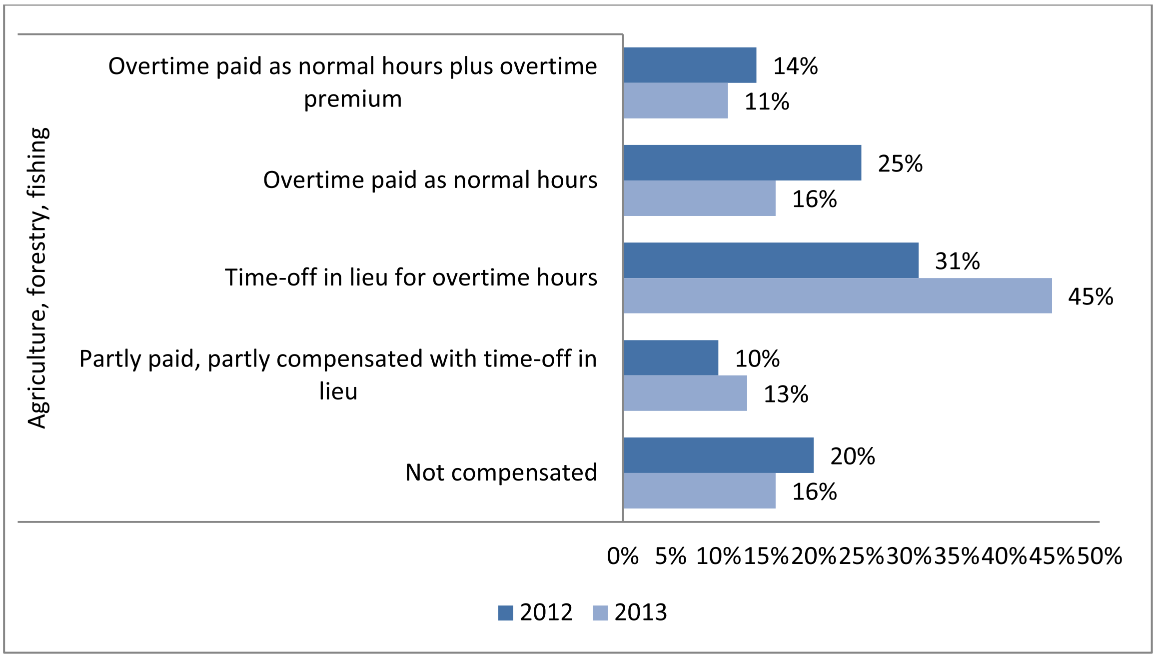


Table 6: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	24%	26%	8%
Training opportunities	45%	32%	-29%
Reorganisation	14%	17%	21%
New strategic initiatives	47%	43%	-9%
Announcement of voluntary retirement	0%	0%	-
Merger with another organisation	20%	8%	-60%
Renewal of computer equipment	61%	50%	-18%
Competent management strategy	44%	28%	-36%

Figure 7: Percentage of employees expecting various scenarios in the next 12 months

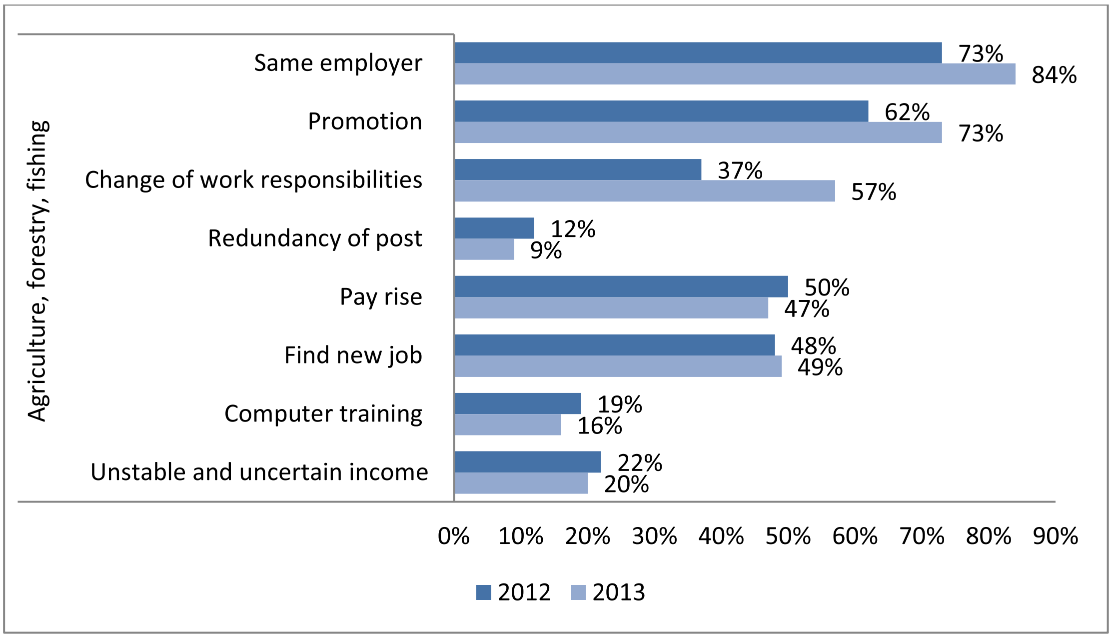


Table 7: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	58%	61%	5%
Wage	29%	25%	-14%
Commuting time	68%	73%	7%
Combination of work and family life	63%	57%	-10%
Job security	66%	58%	-12%
Working environment	67%	60%	-10%
Working hours	59%	64%	8%
Colleagues	72%	69%	-4%
Superiors	63%	59%	-6%
Employer's approach to pay	38%	29%	-24%
Allowances/bonuses	27%	16%	-41%
Kind of contract	48%	49%	2%

Table 8: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	88%	90%
Annual % change		2%

1.2 Construction, technical consultancy

Summary

Wages of workers in the construction and technical consultancy industry were approximately equal to the median of the whole sample. Per hour, the workers in the field earned received a gross wage of about 14.8€ per hour, down 5% in comparison with 2012. Bonuses are quite uncommon in this sector, the most common is profit sharing reported being received by 7% of the workers in the construction (see Table 9 and Figure 8).

The gender pay gap was relatively less pronounced in the construction industry in comparison with other fields of the economy. The most disadvantaged are female workers in craft and trades, who received 9% less in comparison with their male colleagues (see Table 10).

Working hours situation remained largely stable in comparison with 2012, with the exception of workers reporting a higher rate of regular work on Sundays. A vast majority of the workers in the sector worked full-time (87%), for extra work the most common compensation was extra time off, reported by 36% of the respondents (see Table 11 and Figure 9).

Job security stability has, however, deteriorated quite significantly. Redundancies, voluntary retirements and reorganizations were all up sharply from 2012. Trust in the competency of the management has nevertheless also grown from 37% in 2012 to 42% in 2013. Construction and technical workers are also pessimistic when it comes to the 2014 outlook. Fewer of them expect to remain at the same employer, get promoted or receive a pay raise, while the number of those expecting to be made redundant or suffer from unstable and uncertain income has grown (see Table 12 and Figure 10).

General satisfaction picture was mixed and the overall satisfaction of workers in the construction industry remained stable at 90%. Less than a third of workers in the sector are satisfied with their wage and bonuses, even though the satisfaction with pay is 7% higher than in 2012. 71% of construction workers, on the other hand, feels satisfied with their co-workers (see Table 13 and Table 14).

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

Table 9: Median gross hourly wage

	Year of the survey	
	2012	2013
Median	15.6€	14.8€
Annual % Change		-5%

Figure 8: Overview of bonuses given to employees; percentage of employees

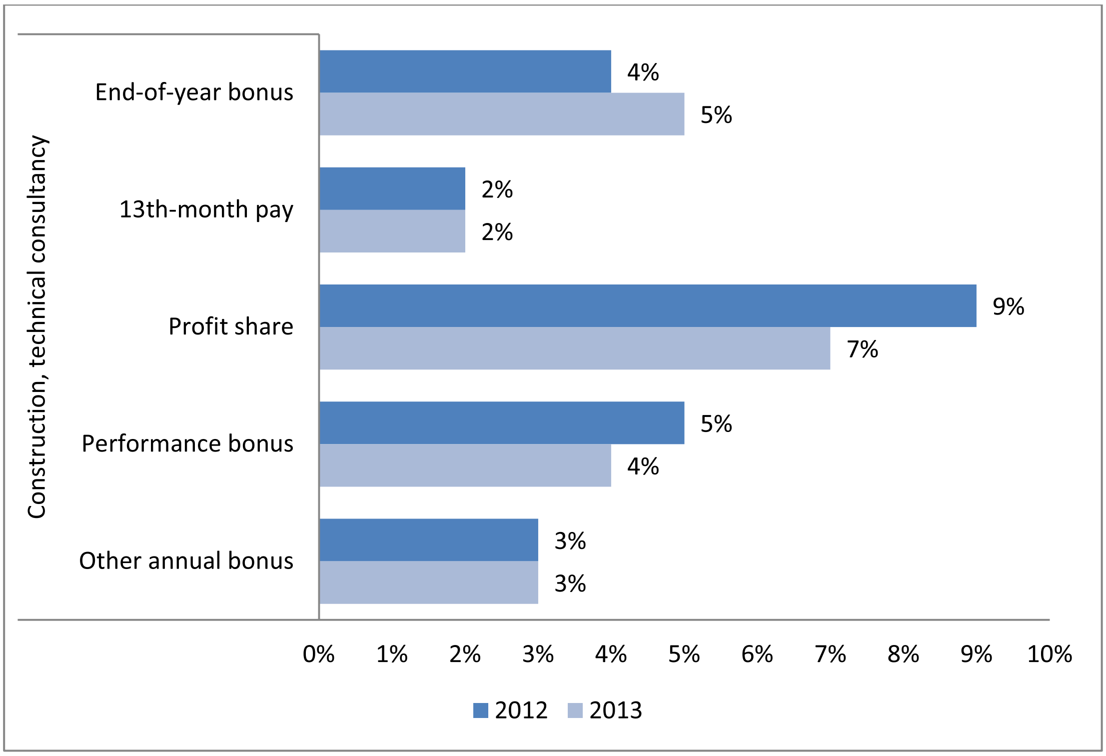


Table 10: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	17.8	16.7	6%
Technicians and associate professionals	16.2	15.4	5%
Clerical support workers	14.4	13.5	7%
Service and sales workers	15.1	14.8	2%
Craft and related trades workers	13.3	12.0	9%

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

Table 11: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	77%	70%	-9%
Full-time working hours	89%	87%	-2%
Work shifts or irregular hours	24%	23%	-4%
Regular work on Saturdays	15%	14%	-7%
Regular work on Sundays	5%	7%	40%
Regular work in the evenings	29%	24%	-17%

Figure 9: Overview of overtime compensation; percentage of employees

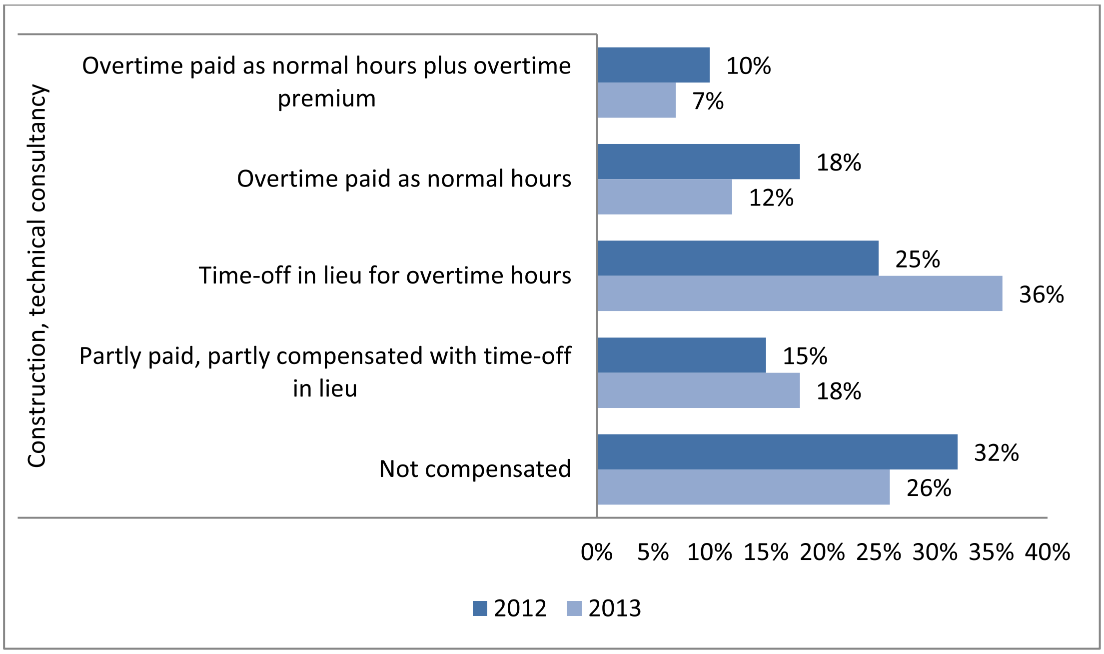


Table 12: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	40%	57%	43%
Training opportunities	41%	39%	-5%
Reorganisation	16%	20%	25%
New strategic initiatives	50%	49%	-2%
Announcement of voluntary retirement	7%	15%	114%
Merger with another organisation	16%	18%	13%
Renewal of computer equipment	38%	34%	-11%
Competent management strategy	37%	42%	14%

Figure 10: Percentage of employees expecting various scenarios in the next 12 months

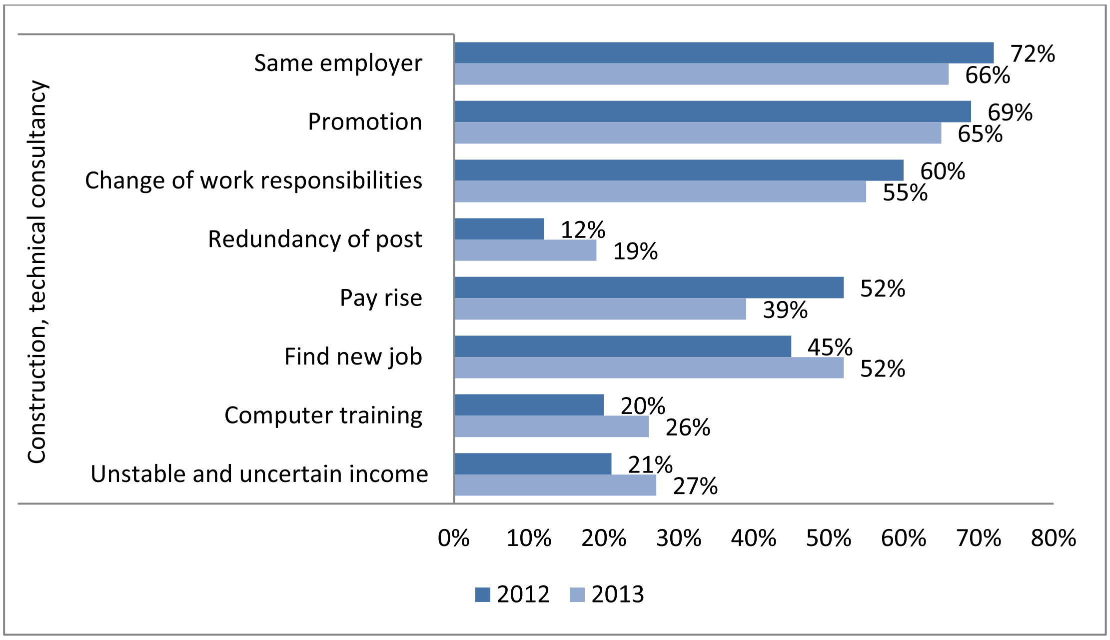


Table 13: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	65%	59%	-9%
Wage	27%	29%	7%
Commuting time	54%	55%	2%
Combination of work and family life	59%	56%	-5%
Job security	69%	69%	0%
Working environment	63%	62%	-2%
Working hours	61%	63%	3%
Colleagues	72%	71%	-1%
Superiors	60%	57%	-5%
Employer's approach to pay	34%	35%	3%
Allowances/bonuses	23%	23%	0%
Kind of contract	42%	39%	-7%

Table 14: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	90%	90%
Annual % change		0%

1.3 Education, research

Summary

In the education and research field, the median wage reported by the respondents fell from 17.3€ in 2012 to 16.4€ in 2013, a 5.2% decrease. Nevertheless, the wage of teachers and scientists are well above the median value of the whole sample. About a third of workers in the industry received an end of the year bonus (see Table 15 and Figure 11).

The gap in wages was about 10%, except among clerks, where females were paid 3% less than men (see Table 16).

Only about two thirds of our respondents had a permanent working contract and only about 50% worked full-time, both figures marked a decrease from 2012. Shift and irregular work as well as weekend work became more common in 2013. In 46% of cases the extra work was not compensated at all, but compared to 2012 it became more common to compensate overtime work with extra time off (see Table 17 and Figure 12).

Half of the respondents in the education sector reported layoffs going on at their organization in 2013, the share of respondents reporting reorganizations went up to 29% from 21% in the previous year. 15% less respondents rated the management strategy of their institution as competent. As for the near future, 67% of respondents see themselves working for the same employer as this year, down 12 percentage points from 2013. 29% fear unstable and uncertain income (see Table 18 and Figure 13).

Satisfaction with wage and particularly employer’s approach to pay dropped sharply in comparison with 2012. Nevertheless, 90% of the respondents still reported being satisfied with their lives (see Table 19 and Table 20).

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

Table 15: Median gross hourly wage

	Year	
	2012	2013
Median	17.3€	16.4€
Annual % Change		-5.2%

Figure 11: Overview of bonuses given to employees; percentage of employees

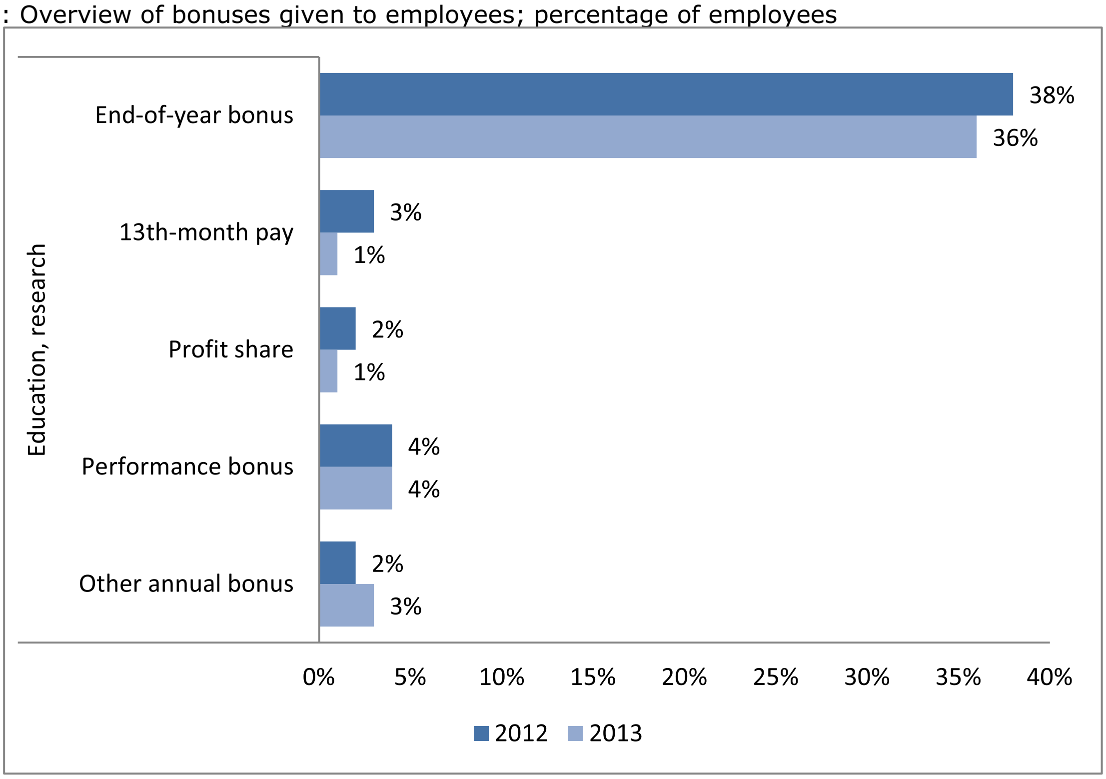


Table 16: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	19.4	17.2	12%
Technicians and associate professionals	17.1	15.4	10%
Clerical support workers	14.2	13.7	3%
Service and sales workers	13.1	11.8	10%

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

Table 17: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	70%	63%	-10%
Full-time working hours	63%	56%	-11%
Work shifts or irregular hours	41%	46%	12%
Regular work on Saturdays	18%	19%	6%
Regular work on Sundays	18%	19%	6%
Regular work in the evenings	47%	47%	0%

Figure 12: Overview of overtime compensation; percentage of employees

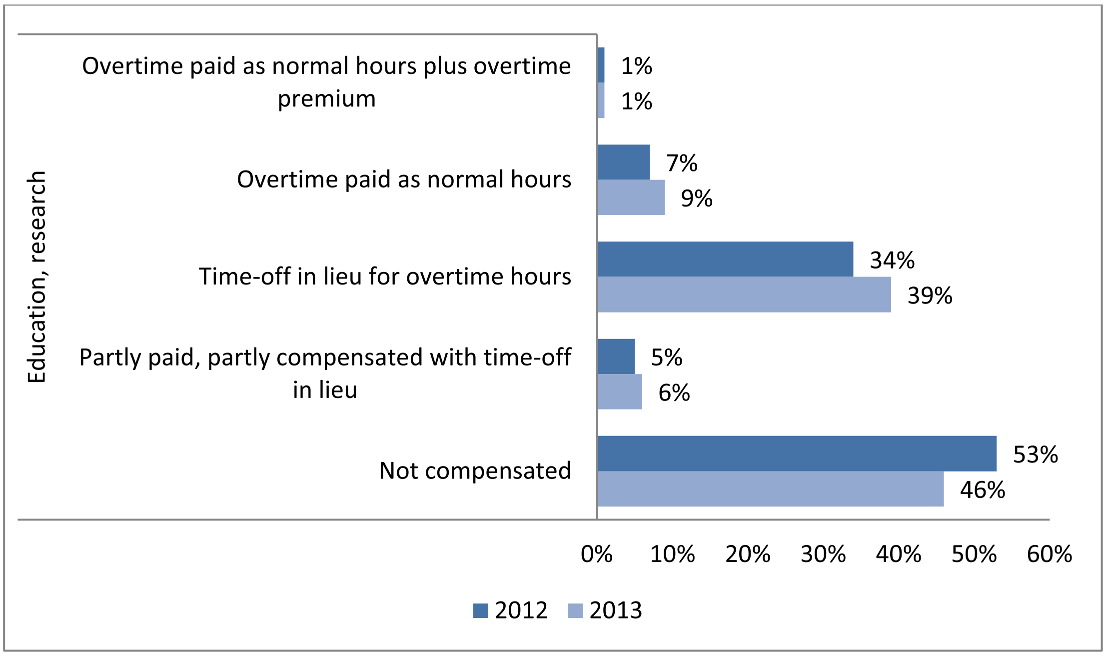


Table 18: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	47%	50%	6%
Training opportunities	58%	53%	-9%
Reorganisation	21%	29%	38%
New strategic initiatives	59%	50%	-15%
Announcement of voluntary retirement	12%	7%	-42%
Merger with another organisation	13%	13%	0%
Renewal of computer equipment	39%	29%	-26%
Competent management strategy	41%	35%	-15%

Figure 13: Percentage of employees expecting various scenarios in the next 12 months

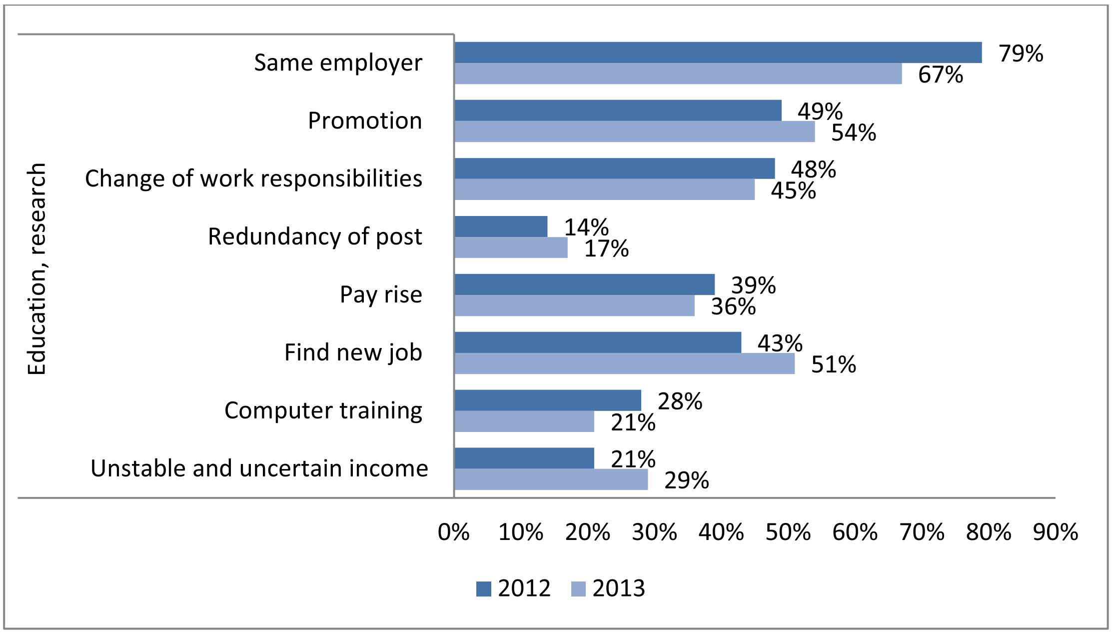


Table 19: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	68%	63%	-7%
Wage	33%	30%	-9%
Commuting time	62%	64%	3%
Combination of work and family life	62%	61%	-2%
Job security	75%	77%	3%
Working environment	69%	63%	-9%
Working hours	64%	61%	-5%
Colleagues	78%	73%	-6%
Superiors	67%	59%	-12%
Employer's approach to pay	43%	29%	-33%
Allowances/bonuses	46%	42%	-9%
Kind of contract	51%	52%	2%

Table 20: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	90%	90%
Annual % change		0%

1.4 Financial services, banking, insurance

Summary

The median salary reported by workers in the financial sector in 2013 was 15.2€, well above the sample median. Nevertheless, the wages reported by our respondents working in finance were nearly 8% lower than in 2012, the biggest decrease of all sectors. The bonus structure, on the other hand, remained relatively stable. The most common was performance bonus, received by 21% of our respondents in the finance field, followed by end of the year bonus (11%), other bonuses (8%) and profit share (7%) (see Table 21 and Figure 14).

The gender pay gap in the field is around 10%, the most pronounced among professionals (11%) (see Table 22).

69% of workers in the sector reported having a permanent employment contract and 75% of them worked full time, both figures declined since 2014. 42% of respondents reported extra work being compensated with additional time off, while 31% of them worked extra without any compensation whatsoever (see Table 23 and Figure 15).

Reported redundancies were up 25% in finance in comparison with the previous year, 31% of respondent reported reorganizations going on at their workplace and confidence in management dropped from 46% in 2012 to 42% in 2013 (see Table 24 and Figure 16). Proportion of finance workers expecting to work for the same employer in the near future dropped by 8 percentage points, while those believing in being promoted went up from 55% to 62%. Like in 2012 55% of finance workers expect a pay rise. 17% of workers in the field fear unstable and uncertain income, up 5 percentage points.

Even though the satisfaction with employer's approach to page dropped to 43% from 49% in 2012, satisfaction with life remained very high (93% reported being satisfied) (see Table 25 and Table 26).

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

Table 21: Median gross hourly wage

	Year	
	2012	2013
Median	16.5€	15.2€
Annual % Change		-7.9%

Figure 14: Overview of bonuses given to employees; percentage of employees

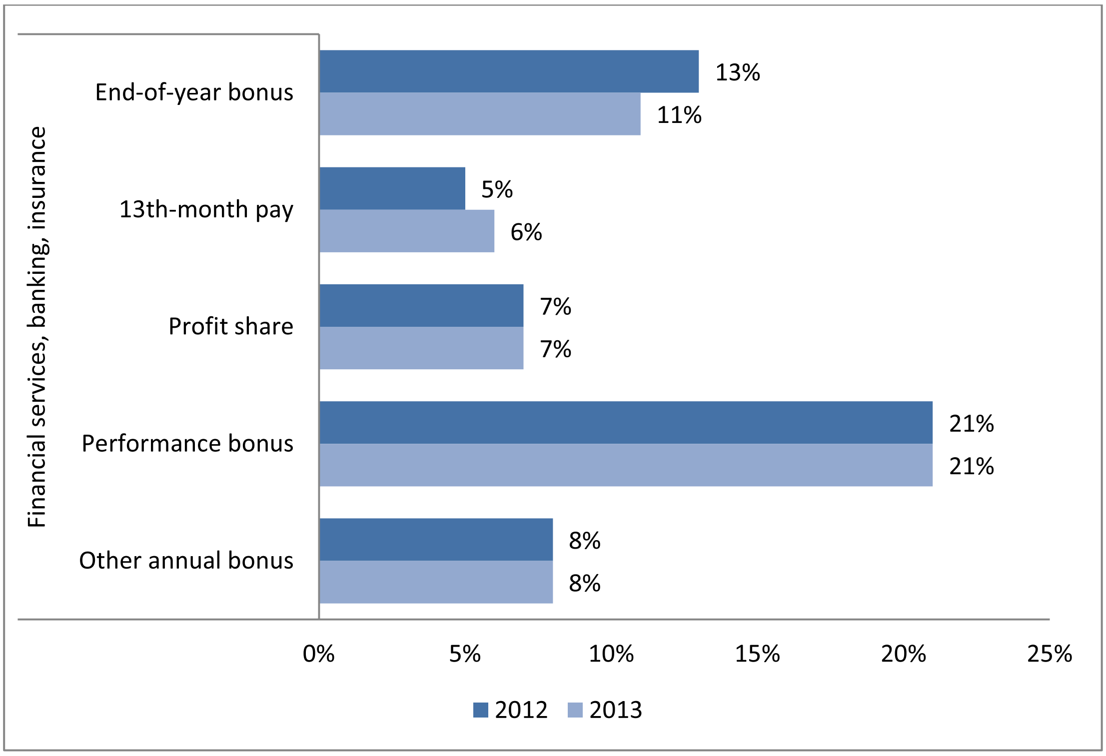


Table 22: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	20.7	18.4	11%
Technicians and associate professionals	15.9	14.8	7%
Clerical support workers	13.9	13.0	6%
Service and sales workers	15.4	14.2	8%

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

Table 23: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	76%	69%	-9%
Full-time working hours	79%	75%	-5%
Work shifts or irregular hours	31%	32%	3%
Regular work on Saturdays	12%	14%	17%
Regular work on Sundays	8%	7%	-13%
Regular work in the evenings	35%	37%	6%

Figure 15: Overview of overtime compensation; percentage of employees

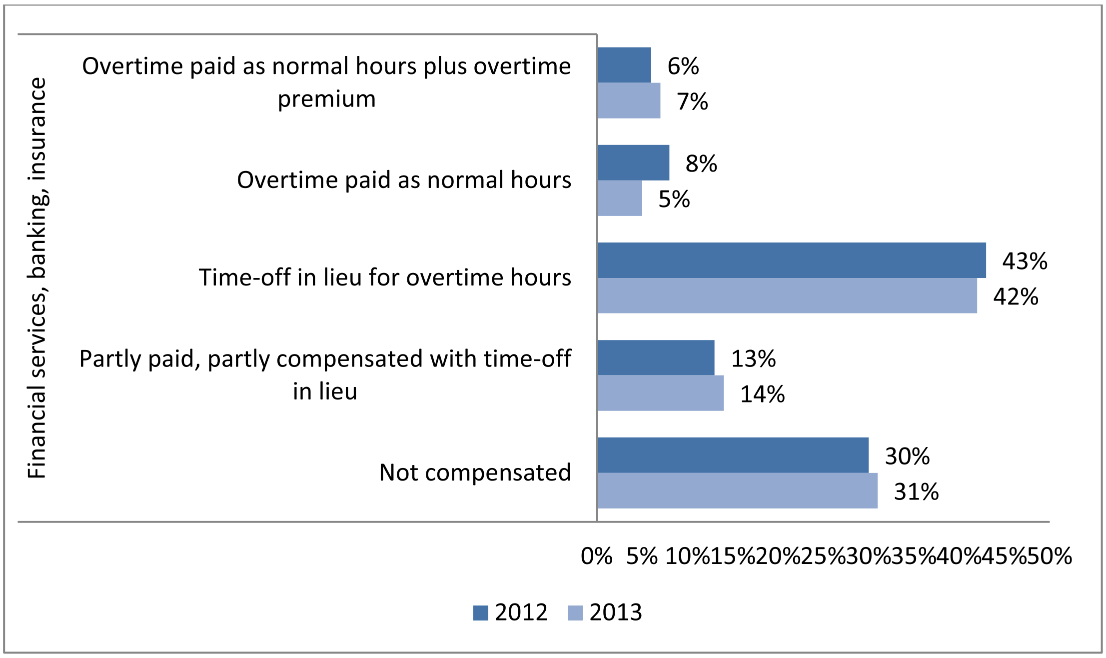


Table 24: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	48%	60%	25%
Training opportunities	62%	67%	8%
Reorganisation	21%	31%	48%
New strategic initiatives	55%	60%	9%
Announcement of voluntary retirement	6%	6%	0%
Merger with another organisation	18%	21%	17%
Renewal of computer equipment	36%	37%	3%
Competent management strategy	46%	42%	-9%

Figure 16: Percentage of employees expecting various scenarios in the next 12 months

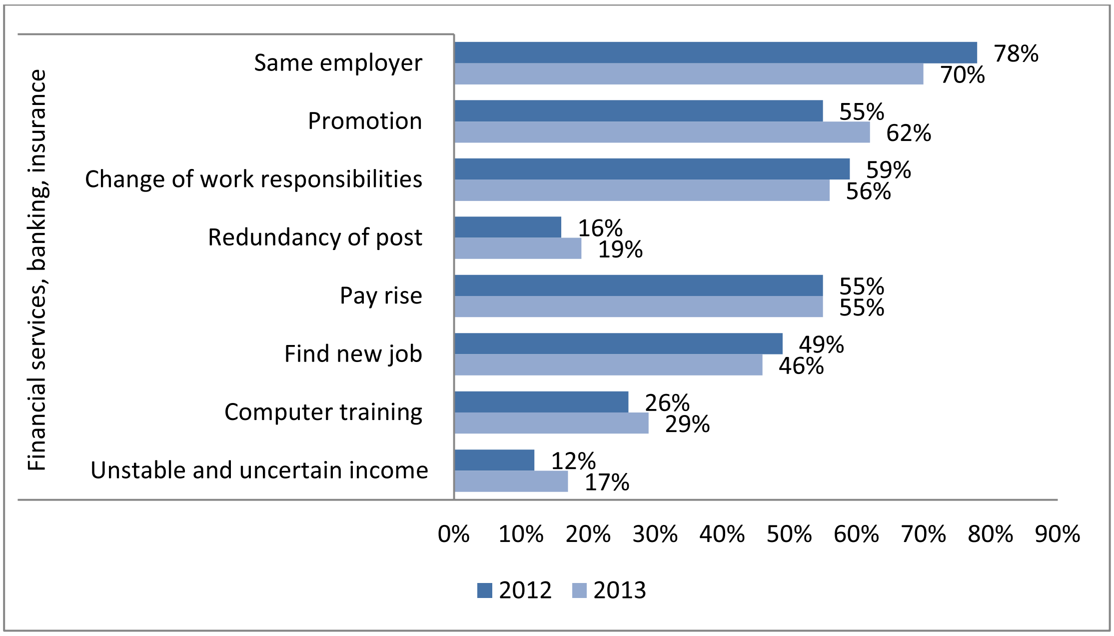


Table 25: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	59%	58%	-2%
Wage	39%	39%	0%
Commuting time	60%	63%	5%
Combination of work and family life	59%	60%	2%
Job security	82%	75%	-9%
Working environment	68%	65%	-4%
Working hours	66%	66%	0%
Colleagues	74%	72%	-3%
Superiors	63%	60%	-5%
Employer's approach to pay	49%	43%	-12%
Allowances/bonuses	44%	45%	2%
Kind of contract	54%	57%	6%

Table 26: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	94%	93%
Annual % change		-1%

1.5 Healthcare, caring services, social work

Summary

Workers in the healthcare, caring service and social work in our sample receive average wages. In comparison with other sectors, their wages remained rather stable at 14.4€ per hour, 2.7% less than in 2012. 37% of our respondents in this sector received the end of the year bonus. Incidence of other bonuses was minimal (see Table 27 and Figure 17).

The gender pay gap is most visible among service workers (15%) and the blue collars (16%), while clerks and tradesmen/women earn about the same (see Table 28).

61% of the respondents in this sector had permanent contract and 45% worked full time. Working in the evenings is very common in healthcare. 71% of respondents reported they commonly work in the evenings. The most common way of compensating overtime work was extra time off (see Table 29 and Figure 18).

Incidence of redundancy announcements has risen by 30% in comparison with 2012 and redundancies announcement at their workplace was reported by half of the respondents. Trust in competent management strategy slipped to 35%. 33% of workers in healthcare fear unstable and uncertain income and 51% expects looking for a new job in the near future (see Table 30 and Figure 19).

Healthcare workers were satisfied with job security (70%), but their satisfaction with employer's approach to pay is decreasing. Nevertheless 89% of workers in the care sector reported being satisfied with life (see Table 31 and Table 32).

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

Table 27: Median gross hourly wage

	Year	
	2012	2013
Median	14.8€	14.4€
Annual % Change		-2.7%

Figure 17: Overview of bonuses given to employees; percentage of employees

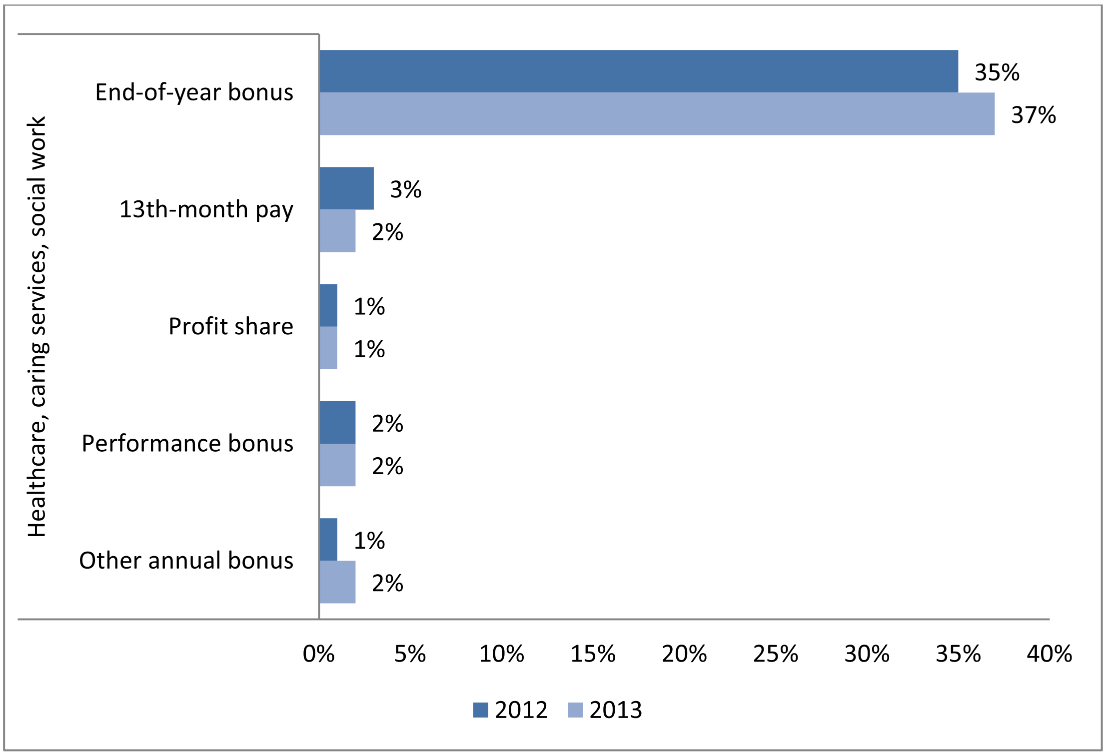


Table 28: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	18.7	17.0	9%
Technicians and associate professionals	15.7	13.9	12%
Clerical support workers	13.8	14.1	-2%
Service and sales workers	14.1	11.9	15%
Craft and related trades workers	14.2	14.3	0%
Plant and machine operators, and assemblers	14.6	12.3	16%
Elementary occupations	10.8	10.4	4%

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

Table 29: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	67%	61%	-9%
Full-time working hours	43%	45%	5%
Work shifts or irregular hours	69%	71%	3%
Regular work on Saturdays	43%	43%	0%
Regular work on Sundays	39%	39%	0%
Regular work in the evenings	47%	47%	0%

Figure 18: Overview of overtime compensation; percentage of employees

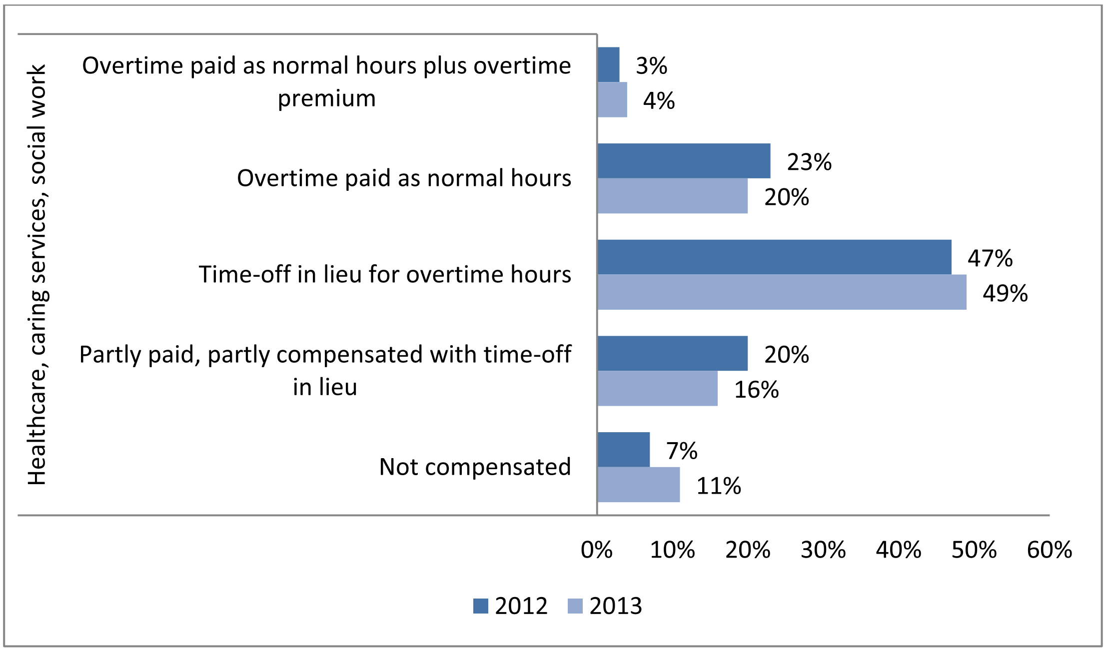


Table 30: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	37%	48%	30%
Training opportunities	53%	52%	-2%
Reorganisation	20%	28%	40%
New strategic initiatives	53%	58%	9%
Announcement of voluntary retirement	6%	8%	33%
Merger with another organisation	22%	24%	9%
Renewal of computer equipment	34%	32%	-6%
Competent management strategy	37%	35%	-5%

Figure 19: Percentage of employees expecting various scenarios in the next 12 months

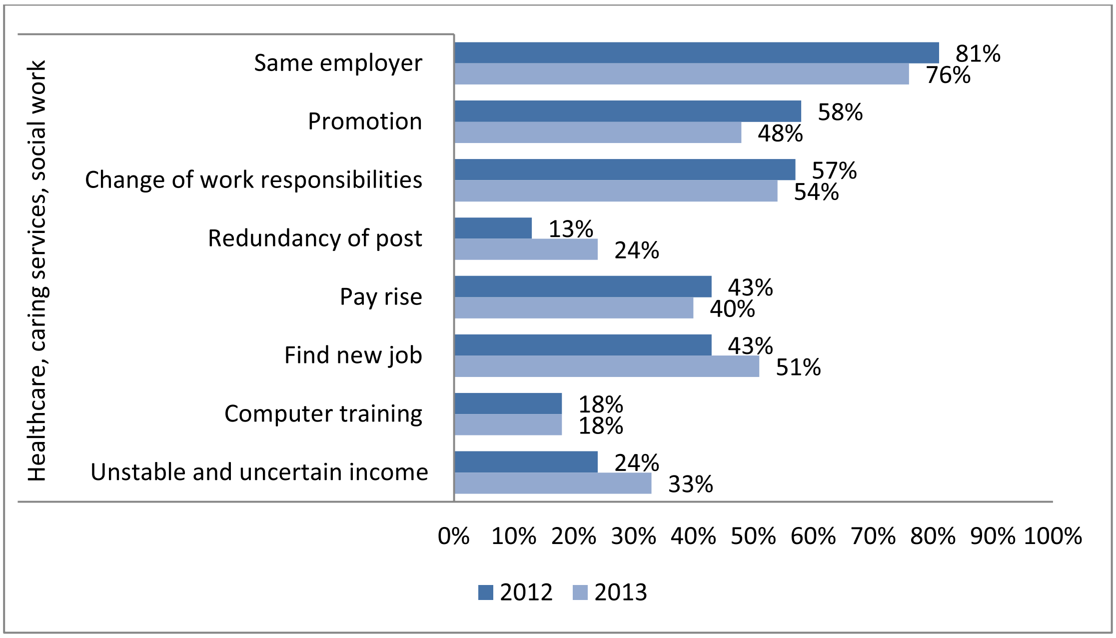


Table 31: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	67%	64%	-4%
Wage	32%	33%	3%
Commuting time	68%	70%	3%
Combination of work and family life	65%	65%	0%
Job security	69%	70%	1%
Working environment	67%	67%	0%
Working hours	64%	62%	-3%
Colleagues	76%	76%	0%
Superiors	64%	62%	-3%
Employer's approach to pay	43%	37%	-14%
Allowances/bonuses	37%	35%	-5%
Kind of contract	53%	46%	-13%

Table 32: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	90%	89%
Annual % change		-1%

1.6 Hospitality, catering, tourism

Summary

Hospitality, catering and tourism workers were paid the worst in our sample. In 2013 their median hourly gross wage was 10.4€, about the same as in 2012. Bonuses were generally very rare, even the end of the year bonus was paid only to 4% of the sampled workers, down from 8% in 2012 (see Table 33 and Figure 20).

Gender pay gaps in this sector were very pronounced, men earn much more in technical and craft occupations (12% and 27% respectively), while among the workers in elementary occupations, females are less poor (see Table 34).

Prevalence of full time and permanent work declined in 2013 by 8 and 12% respectively. Workers in hospitality, catering and tourism were commonly asked to work evenings, Saturdays and even Sundays. Typically, the extra work is compensated by additional time off (see Table 35 and Figure 21).

Announcements of redundancy increased by 32% in 2013 in comparison with the previous year in the hospitality, catering and tourism sector. At the same time, 26% of workers in the sector expressed confidence in the strategy of their management, which is more than in 2012 but still less than in other sectors. As for the future expectations, only half of the hospitality workers expect to work for the same employer and a third fear uncertain and unstable income (see Table 36 and Figure 22).

Only about a half of hospitability workers expressed being satisfied with their jobs. In particular, they were dissatisfied with the (lack of) bonuses. Nevertheless, 88% of the workers in this field expressed being satisfied with life in general (see Table 37 and Table 38).

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

Table 33: Median gross hourly wage

	Year	
	2012	2013
Median	10.5€	10.4€
Annual % Change		-1.0%

Figure 20: Overview of bonuses given to employees; percentage of employees

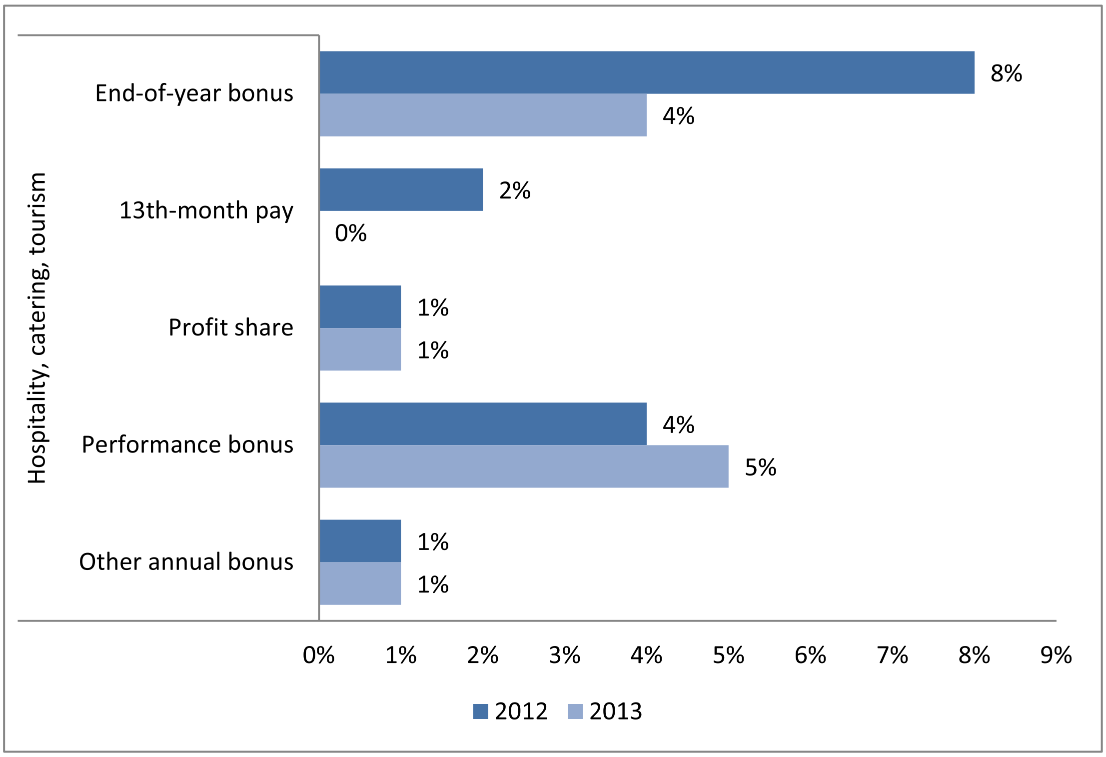


Table 34: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	14.7	14.3	3%
Technicians and associate professionals	14.0	12.3	12%
Clerical support workers	10.9	10.8	1%
Service and sales workers	9.9	9.2	7%
Craft and related trades workers	11.5	8.5	27%
Elementary occupations	6.2	8.5	-39%

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

Table 35: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	50%	44%	-12%
Full-time working hours	72%	66%	-8%
Work shifts or irregular hours	76%	82%	8%
Regular work on Saturdays	75%	78%	4%
Regular work on Sundays	64%	67%	5%
Regular work in the evenings	70%	71%	1%

Figure 21: Overview of overtime compensation; percentage of employees

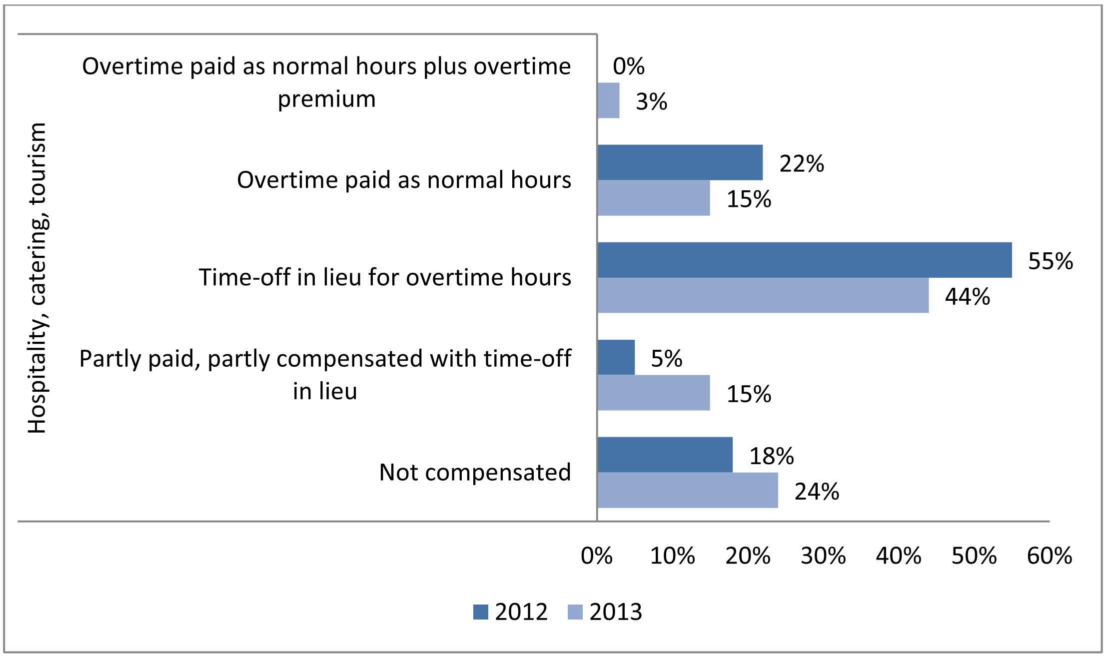


Table 36: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	31%	41%	32%
Training opportunities	33%	29%	-12%
Reorganisation	11%	16%	45%
New strategic initiatives	26%	41%	58%
Announcement of voluntary retirement	1%	3%	200%
Merger with another organisation	5%	5%	0%
Renewal of computer equipment	23%	17%	-26%
Competent management strategy	22%	26%	18%

Figure 22: Percentage of employees expecting various scenarios in the next 12 months

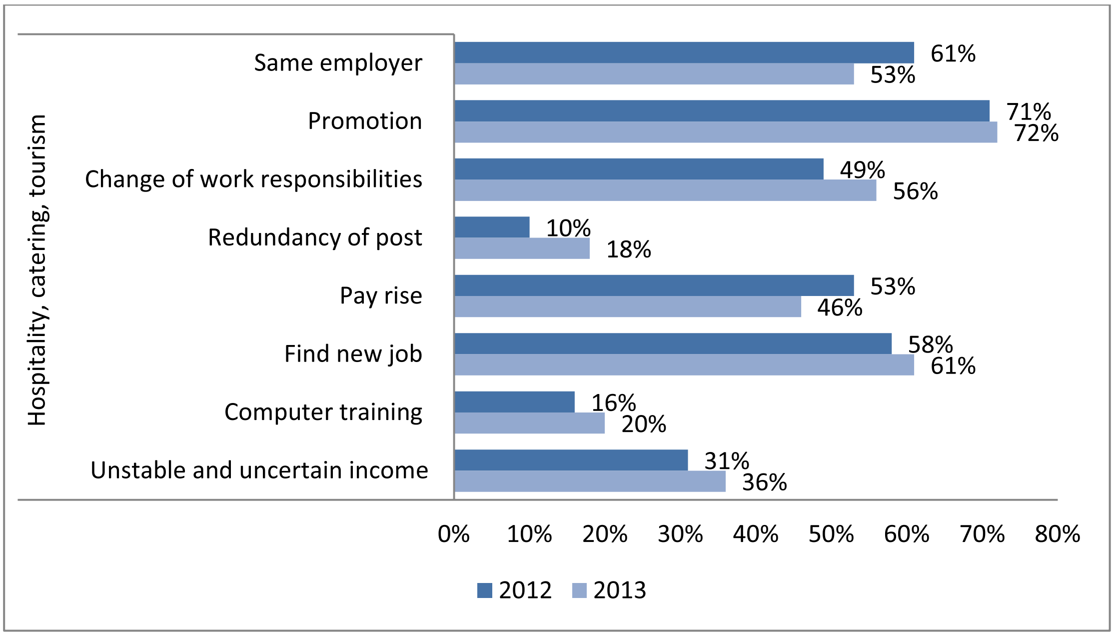


Table 37: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	60%	52%	-13%
Wage	17%	22%	29%
Commuting time	66%	67%	2%
Combination of work and family life	44%	50%	14%
Job security	67%	62%	-7%
Working environment	65%	61%	-6%
Working hours	51%	53%	4%
Colleagues	75%	76%	1%
Superiors	60%	59%	-2%
Employer's approach to pay	30%	29%	-3%
Allowances/bonuses	22%	14%	-36%
Kind of contract	33%	34%	3%

Table 38: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	88%	88%
Annual % change		0%

1.7 ICT services

Summary

Workers in the ICT services receive more then the median of our sample, although the wage of respondents in the ICT sector reported in 2013 was 8.5% lower than the previous year. Employers in ICT used mainly the performance bonus (18% of respondents in the sector reported receiving it) to motivate the workers (see Table 39 and Figure 23).

Gender pay gap in the ICT sector favoured men in sales by 16%, yet when it comes to technical and associate positions, women earn 7% more (see Table 40).

86% of workers in ICT worked full time in 2013, while the share of workers with permanent working contract has decreased by 10% to 69%. In comparison with 2012, the frequency of overtime work decreased. 38% of ICT workers reported not being compensated for overtime work and 34% received additional time off (see Table 41 and Figure 24).

About a third of the ICT workers reported redundancies being announced at their workplace, less than in other sectors. 54%, significantly more than in 2012, of ICT workers trust in the competent management of their employer. Only 10% fear they might be made redundant soon and only 14% fear uncertain and unstable income (see Table 42 and Figure 25).

Satisfaction with job decreased by 8% from 2012, yet 92% of ICT workers reported being satisfied with life (see Table 43 and Table 44).

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

Table 39: Median gross hourly wage

	Year	
	2012	2013
Median	16.5€	15.1€
Annual % Change		-8.5%

Figure 23: Overview of bonuses given to employees; percentage of employees

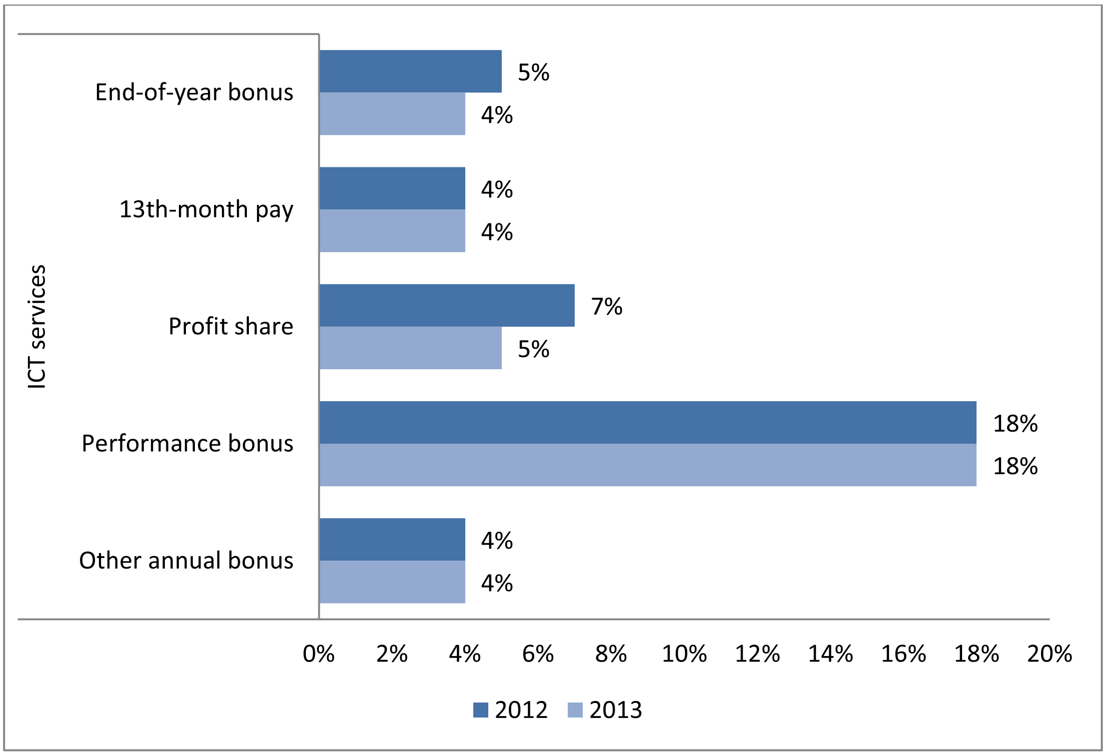


Table 40: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	16.6	15.9	4%
Technicians and associate professionals	13.5	14.4	-7%
Clerical support workers	12.6	12.7	-1%
Service and sales workers	15.1	12.7	16%

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

Table 41: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	77%	69%	-10%
Full-time working hours	88%	86%	-2%
Work shifts or irregular hours	17%	24%	41%
Regular work on Saturdays	16%	13%	-19%
Regular work on Sundays	12%	10%	-17%
Regular work in the evenings	37%	37%	0%

Figure 24: Overview of overtime compensation; percentage of employees

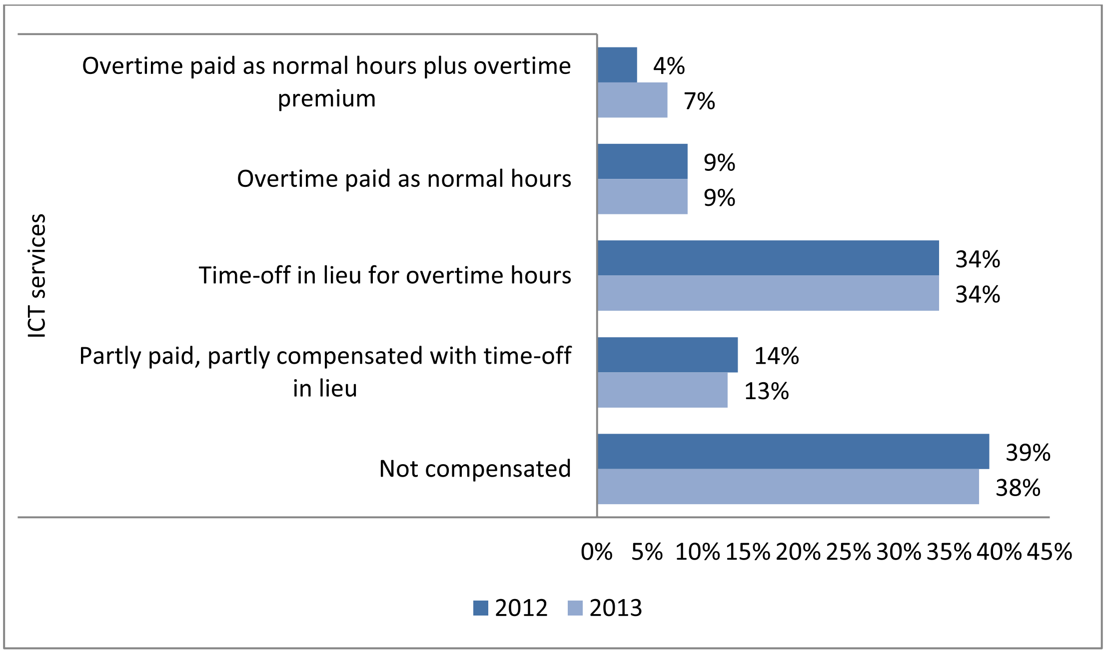


Table 42: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	36%	36%	0%
Training opportunities	49%	55%	12%
Reorganisation	15%	18%	20%
New strategic initiatives	58%	67%	16%
Announcement of voluntary retirement	2%	1%	-50%
Merger with another organisation	22%	19%	-14%
Renewal of computer equipment	37%	39%	5%
Competent management strategy	41%	54%	32%

Figure 25: Percentage of employees expecting various scenarios in the next 12 months

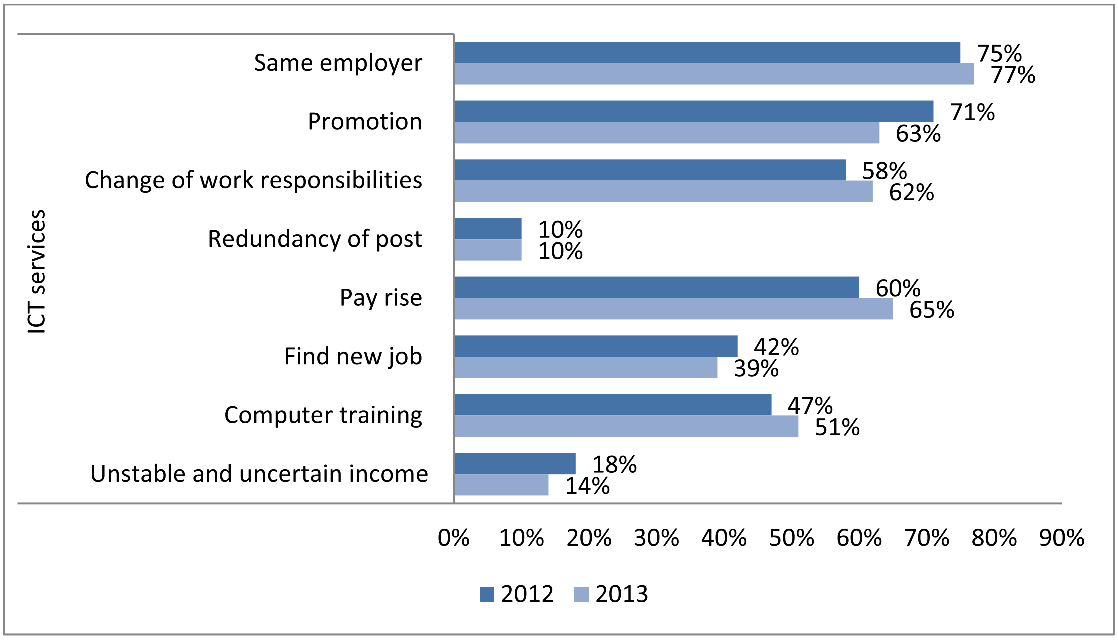


Table 43: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	64%	59%	-8%
Wage	31%	33%	6%
Commuting time	53%	54%	2%
Combination of work and family life	58%	56%	-3%
Job security	79%	80%	1%
Working environment	67%	70%	4%
Working hours	61%	63%	3%
Colleagues	74%	74%	0%
Superiors	62%	63%	2%
Employer's approach to pay	40%	38%	-5%
Allowances/bonuses	31%	34%	10%
Kind of contract	43%	51%	19%

Table 44: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	91%	92%
Annual % change		1%

1.8 Manufacturing

Summary

Dutch manufacturing workers in our sample were paid well above the median of the whole sample. For an hour of work they received gross wage of 17.3€, 5.8% less than in 2012. Bonuses were also quite prevalent, mainly the performance bonus, received by 17% of the workers in manufacturing, followed by 12% benefiting from end of the year bonus and profit sharing (see Table 45 and Figure 26).

Manufacturing is a sector in which men clear earned more than women across professional categories, mainly in sales (23% more) and blue collar occupation (18%) (see Table 46).

77% of manufacturing workers had permanent working contract and 90% worked full time. Irregular and shift work has increased by 13% from 2012, while weekend and evening worked remained stable. As for compensation, the practice of unpaid overtime became even more prevalent, (reported by 37% of respondents in 2013 up 7 percentage points from 2012), additional time off (21%), sometimes with combination with part payments (17%). 17% of respondents received their "normal rate" plus extra premium for overtime work (see Table 47 and Figure 27).

Redundancies were reported by 40% of workers in the field, while 62% reported new strategic initiatives. 46% of manufacturing workers trust their management, slightly up from 2012. 80% of surveyed workers expect to stay with their employer, 10% expect to be made redundant soon and 18% fears unstable and uncertain income (see Table 48 and Figure 28).

Satisfaction with most aspects of job decreased slightly in comparison with 2012, but 64% of manufacturing workers expressed being satisfied with their job. 93% of manufacturing workers are reported being satisfied with life (see Table 49 and Table 50).

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

Table 45: Median gross hourly wage

	Year	
	2012	2013
Median	17.3€	16.3€
Annual % Change		-5.8%

Figure 26: Overview of bonuses given to employees; percentage of employees

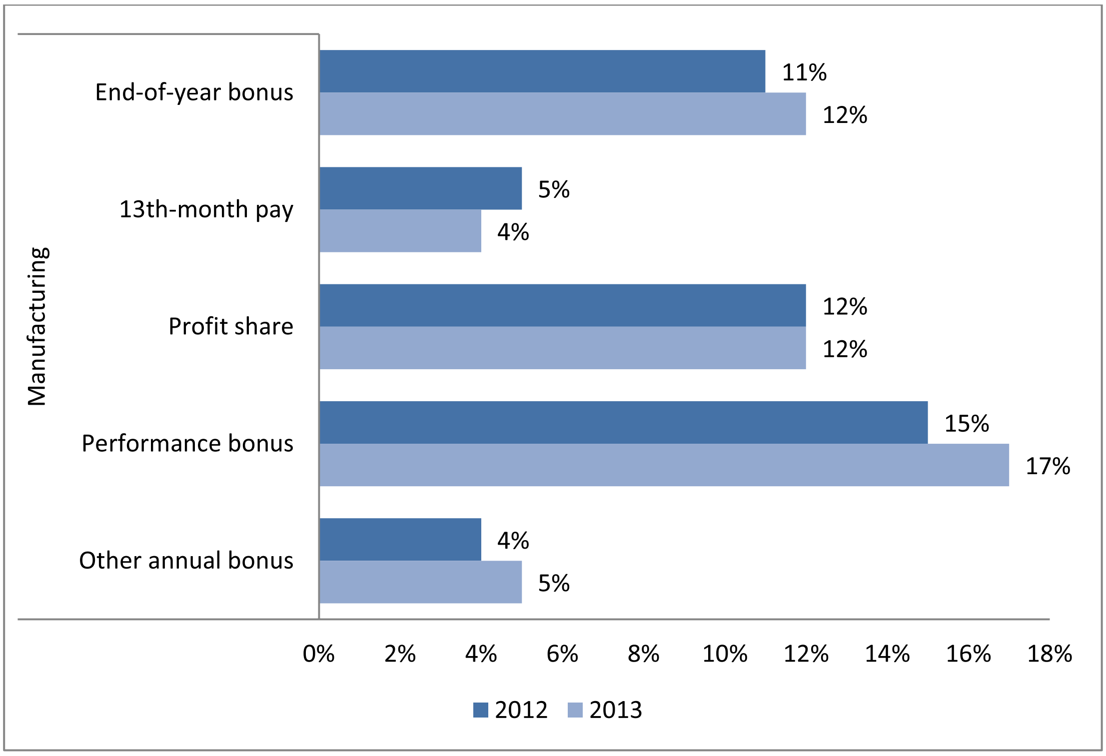


Table 46: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	19.6	17.7	9%
Technicians and associate professionals	17.5	16.5	5%
Clerical support workers	15.0	13.8	8%
Service and sales workers	16.4	12.7	23%
Craft and related trades workers	14.0	12.4	12%
Plant and machine operators, and assemblers	13.7	11.3	18%
Elementary occupations	12.2	10.5	14%

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

Table 47: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	83%	77%	-7%
Full-time working hours	90%	90%	0%
Work shifts or irregular hours	31%	35%	13%
Regular work on Saturdays	23%	23%	0%
Regular work on Sundays	14%	14%	0%
Regular work in the evenings	40%	40%	0%

Figure 27: Overview of overtime compensation; percentage of employees

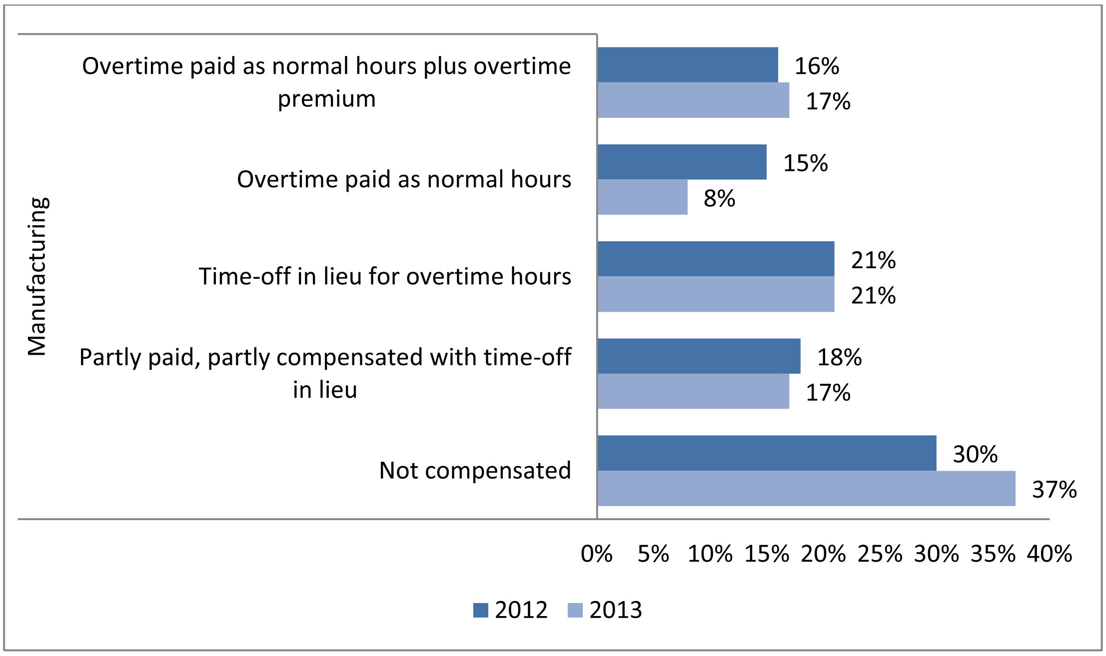


Table 48: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	38%	40%	5%
Training opportunities	48%	51%	6%
Reorganisation	17%	16%	-6%
New strategic initiatives	60%	62%	3%
Announcement of voluntary retirement	9%	8%	-11%
Merger with another organisation	21%	18%	-14%
Renewal of computer equipment	50%	46%	-8%
Competent management strategy	45%	46%	2%

Figure 28: Percentage of employees expecting various scenarios in the next 12 months

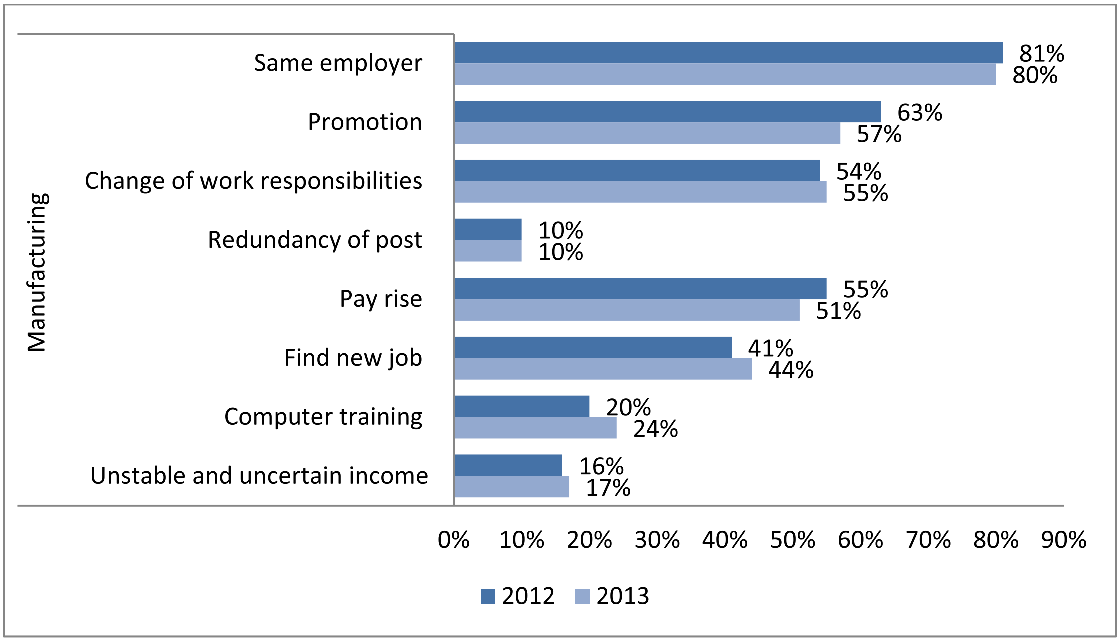


Table 49: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	68%	64%	-6%
Wage	36%	36%	0%
Commuting time	63%	60%	-5%
Combination of work and family life	63%	58%	-8%
Job security	71%	70%	-1%
Working environment	66%	64%	-3%
Working hours	68%	62%	-9%
Colleagues	78%	72%	-8%
Superiors	63%	60%	-5%
Employer's approach to pay	39%	37%	-5%
Allowances/bonuses	41%	41%	0%
Kind of contract	57%	51%	-11%

Table 50: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	92%	93%
Annual % change		1%

1.9 Legal and market consultancy, business activities

Summary

Workers in the legal and market consultancy and business field earned in average more than the median wage in the sample, but their hourly wage of 14.9€ was 5.7% lower than in 2012. Extra bonus money were typically paid to workers in this field as performance bonus, which was received by 13% of the respondents (see Table 51 and Figure 29).

The gender pay gap in this sector is the biggest among service and sales workers, where men earn 11% more than their female colleagues and technicians and associate professionals, where the pay favours men by 10% (see Table 52).

65% of workers in legal and market consultancy and business activities sector had permanent contract in 2013 and 72% of them worked full time. Almost a third worked regularly in the evenings. Extra work was typically compensated through time off in lieu for overtime hours (41%) or not compensated at all (38%) (see Table 53 and Figure 30).

About a third of workers in this sectors reported layoffs being announced at their workplace, a proportion unchanged from 2012. Trust in competence of the management increased to 40%. 69% of the workers in the field expect to work for the same employer in the foreseeable future, fears of layoffs, unstable and uncertain income are low (see Table 54 and Figure 31).

Satisfaction with most work aspect has grown in comparison with 2012 and overall 92% of workers in law, market consultancy and business activities are satisfied with their lives (see Table 55 and Table 56).

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

Table 51: Median gross hourly wage

	Year	
	2012	2013
Median	15.8€	14.9€
Annual % Change		-5.7%

Figure 29: Overview of bonuses given to employees; percentage of employees

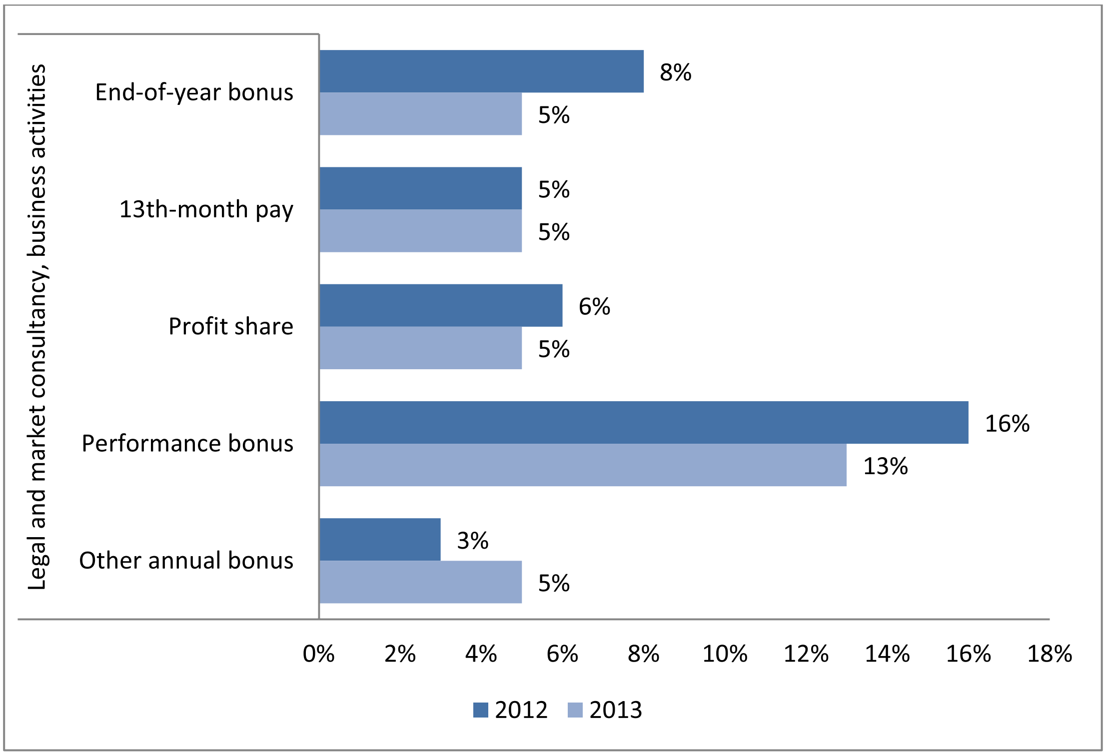


Table 52: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	17.9	16.4	9%
Technicians and associate professionals	16.0	14.4	10%
Clerical support workers	13.1	12.7	3%
Service and sales workers	13.9	12.3	11%
Craft and related trades workers	14.0	13.5	3%
Elementary occupations	12.7	11.5	9%

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

Table 53: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	70%	65%	-7%
Full-time working hours	69%	72%	4%
Work shifts or irregular hours	23%	24%	4%
Regular work on Saturdays	11%	12%	9%
Regular work on Sundays	8%	8%	0%
Regular work in the evenings	34%	32%	-6%

Figure 30: Overview of overtime compensation; percentage of employees

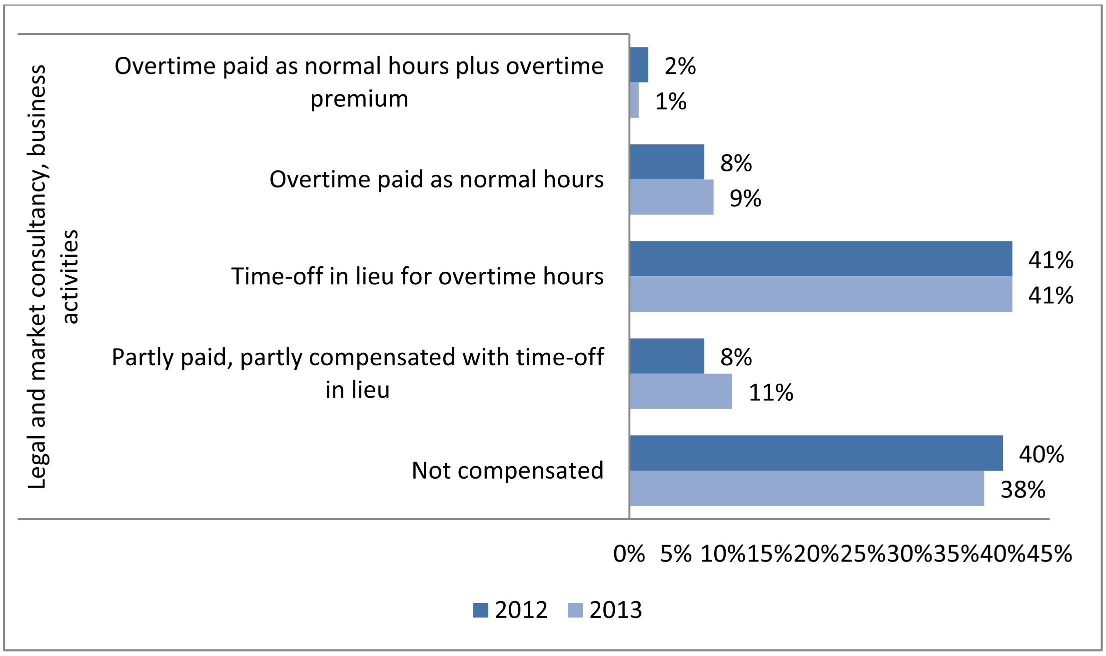


Table 54: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	36%	36%	0%
Training opportunities	43%	42%	-2%
Reorganisation	22%	18%	-18%
New strategic initiatives	52%	54%	4%
Announcement of voluntary retirement	4%	3%	-25%
Merger with another organisation	14%	16%	14%
Renewal of computer equipment	27%	30%	11%
Competent management strategy	34%	40%	18%

Figure 31: Percentage of employees expecting various scenarios in the next 12 months

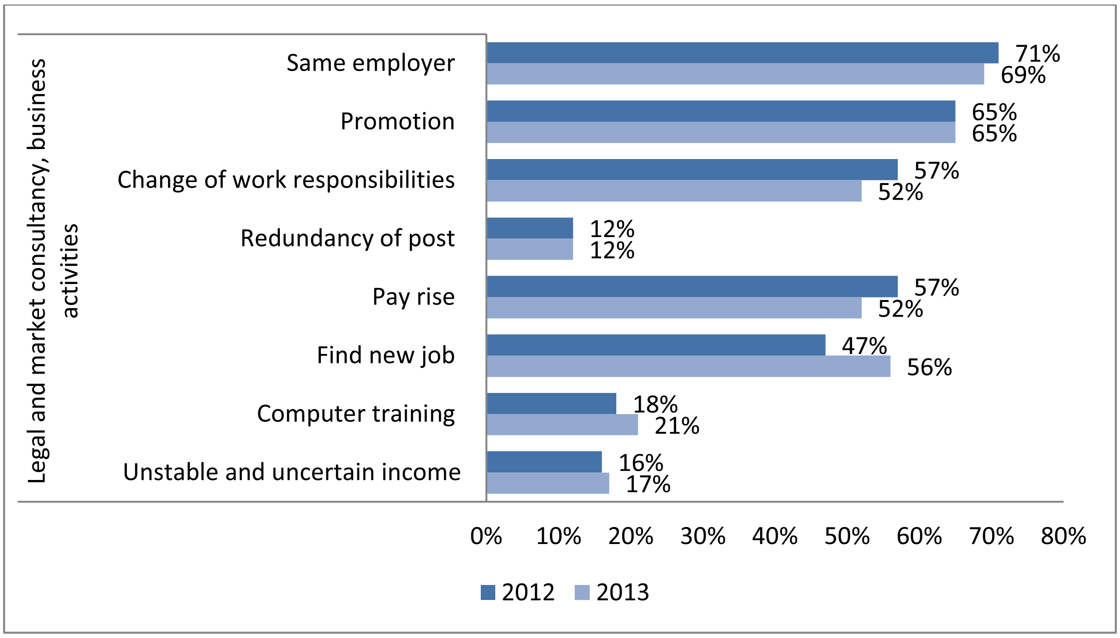


Table 55: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	60%	62%	3%
Wage	33%	36%	9%
Commuting time	57%	59%	4%
Combination of work and family life	58%	60%	3%
Job security	77%	76%	-1%
Working environment	65%	66%	2%
Working hours	64%	66%	3%
Colleagues	74%	72%	-3%
Superiors	60%	62%	3%
Employer's approach to pay	32%	37%	16%
Allowances/bonuses	29%	29%	0%
Kind of contract	48%	51%	6%

Table 56: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	91%	92%
Annual % change		1%

1.10 Transport, logistics, communication

Summary

The median wage in transport, logistics and communication in our sample was 13.3€ in 2013, down 6.3% from the previous year. The most common bonuses in the sector were the end of the year bonus received by 11% of the sampled workers and performance bonus (9%) (see Table 57 and Figure 32)

In transport, logistics and communication, men are most privileged in technical and associate, service and sales and blue collar occupations, where they earn 14-15% more than their female colleagues. Clerical support workers earn the same regardless of their gender (see Table 58).

84% of workers in transportation work full time. Working during evenings and weekends is also very common in the transportation industry. About a quarter of workers in the field do not get compensated for overtime work, another quarter gets time off in lieu to for overtime hours and the rest gets paid, either partly in combination with extra free time(16%), fully (18%) or even with a premium on top of the usual rate (18%) (see Table 59 and Figure 33).

In 2013 37% of respondents reported redundancies being announced at their workplace, up 12% from 2012. Meanwhile, renewal of computer equipment became rarer, only 36% of respondents reported it, 22% less than in the previous year. Belief in competence of the management dropped 37% from 43% in the previous year (see Table 60 and Figure 34).

Dutch transport workers became less satisfied in particular with bonuses and approach to pay at their workplace. Nevertheless, 89% of them reported being satisfied with their lives (see Table 61 and Table 62).

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

Table 57: Median gross hourly wage

	Year	
	2012	2013
Median	14.2€	13.3€
Annual % change		-6.3%

Figure 32: Overview of bonuses given to employees; percentage of employees

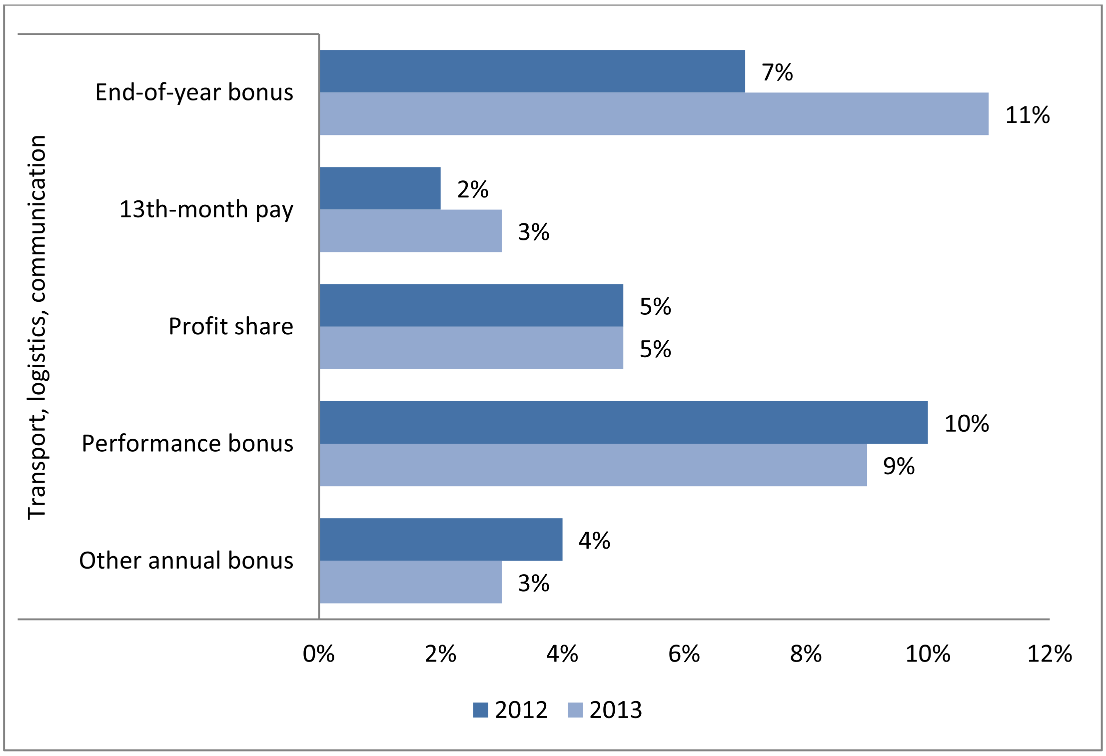


Table 58: Median gross hourly wage by subgroups; pay gap computed

	Gender		
	Male	Female	Pay gap
Professionals	17.9	17.3	3%
Technicians and associate professionals	17.3	15.0	14%
Clerical support workers	12.2	12.2	0%
Service and sales workers	14.2	12.2	15%
Plant and machine operators, and assemblers	12.3	10.6	14%
Elementary occupations	11.0	9.8	10%

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

Table 59: Working hours; percentage of employees

	Year		
	2012	2013	% change
Permanent employment contract	72%	64%	-11%
Full-time working hours	88%	84%	-5%
Work shifts or irregular hours	39%	54%	38%
Regular work on Saturdays	39%	44%	13%
Regular work on Sundays	25%	30%	20%
Regular work in the evenings	49%	51%	4%

Figure 33: Overview of overtime compensation; percentage of employees

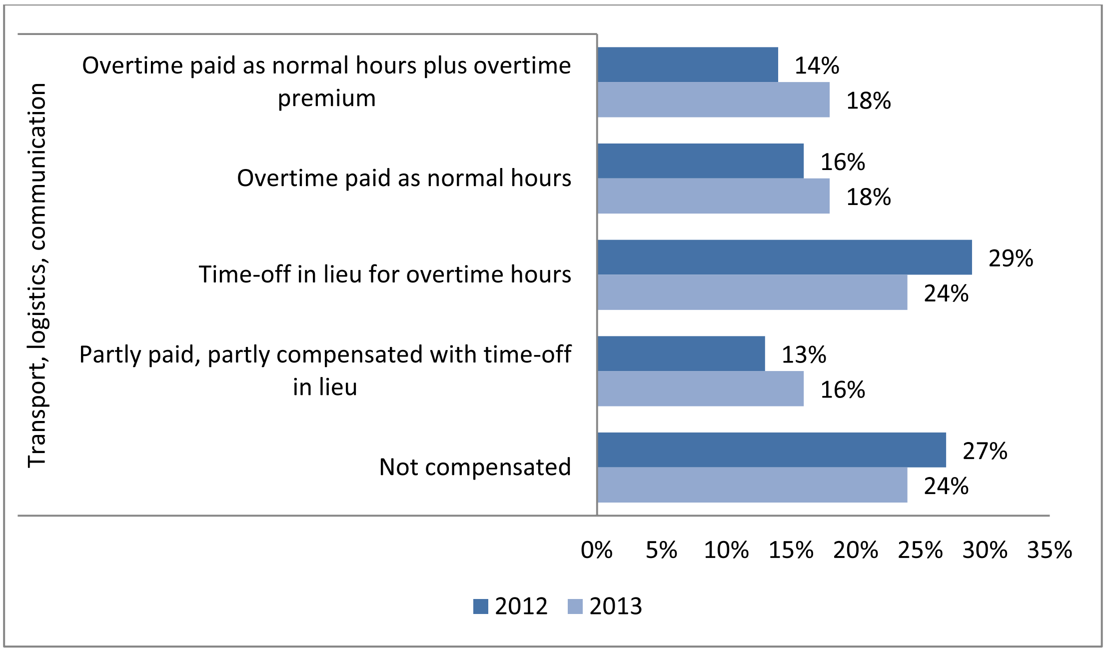


Table 60: Percentage of employees reporting past 12 months of the organization

	Year		
	2012	2013	% change
Announcement of redundancies	33%	37%	12%
Training opportunities	43%	42%	-2%
Reorganisation	16%	18%	13%
New strategic initiatives	59%	45%	-24%
Announcement of voluntary retirement	5%	3%	-40%
Merger with another organisation	17%	17%	0%
Renewal of computer equipment	46%	36%	-22%
Competent management strategy	43%	37%	-14%

Figure 34: Percentage of employees expecting various scenarios in the next 12 months

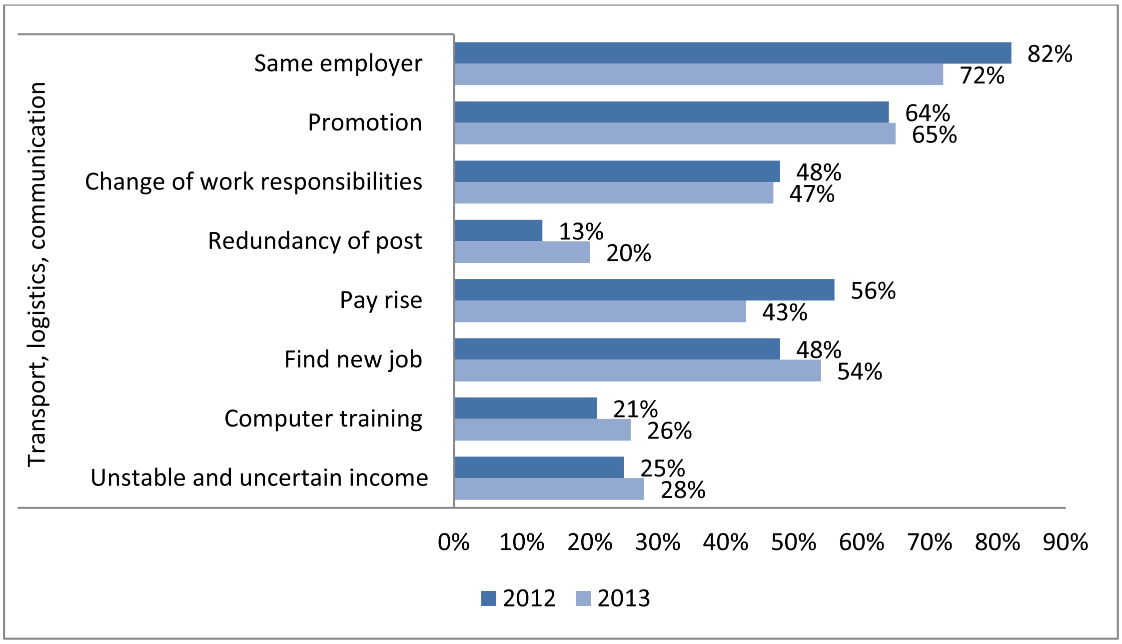


Table 61: Percentage of employees satisfied with various aspects of work

	Year		
	2012	2013	% change
Job	63%	53%	-16%
Wage	30%	27%	-10%
Commuting time	59%	62%	5%
Combination of work and family life	54%	49%	-9%
Job security	67%	63%	-6%
Working environment	62%	54%	-13%
Working hours	56%	53%	-5%
Colleagues	70%	68%	-3%
Superiors	57%	52%	-9%
Employer's approach to pay	37%	27%	-27%
Allowances/bonuses	33%	23%	-30%
Kind of contract	51%	43%	-16%

Table 62: Percentage of employees satisfied with life

	Year	
	2012	2013
% of respondents	88%	86%
Annual % change		-2%

2 Main sector developments 2006 – 2013

In this chapter we focus on major trends in wages and bonuses in the period 2006-2013 in two specific sectors[4]: the ICT services sector and the Financial services, banking, insurance sector.

2.1 ICT services

In 2013, our respondents reported significantly lower wages than in the previous years. The 15.1€ gross hourly median wage is the lowest one since we started collecting data. Looking at the development in time, we can see that since the outbreak of the crisis, the ICT employers in the Netherlands were very careful when negotiating wages with the employees (see Table 63).

Bonus structure remains pretty stable, year to year changes in incidence of individual bonuses were minimal (see Table 64).

Nevertheless announcements of redundancies remain stable and the confidence in management strategy is recovering somewhat, although remains well below the pre-crisis values (see Table 65).

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

Table 63: Median gross hourly wage

	Year of the survey							
	2006	2007	2008	2009	2010	2011	2012	2013
Median	16.2	18	18.2	17.1	17.2	16.6	16.5	15.1
Annual change		11.1%	1.1%	-6.0%	0.6%	-3.5%	-0.6%	-8.5%

[4] 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 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 given to employees; percentage of employees

	Employee bonus			
Year	End-of-year bonus	13th-month pay	Profit share	Performance bonus
2007	6%	10%	17%	32%
2008	7%	11%	18%	39%
2009	9%	12%	13%	31%
2010	5%	5%	8%	20%
2011	6%	4%	7%	19%
2012	5%	4%	7%	18%
2013	4%	4%	5%	18%

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

	Past 12 months of organisations			
Year	Announcement of redundancies	Training opportunities	Reorganisation	Competent management strategy
2006	30%	65%	33%	57%
2007	15%	71%	28%	67%
2008	18%	74%	35%	71%
2009	38%	58%	16%	42%
2010	42%	60%	20%	49%
2011	32%	52%	17%	54%
2012	36%	49%	15%	41%
2013	36%	55%	18%	54%

2.2 Financial services, banking, insurance

Average gross hourly wage in the Finance sector in 2013 reported by respondents of the WageIndicator decreased to 15.2€ per hour, just above the 2006 level. 2013 is the first year, where we can see a significant drop in income. Unlike in other fields, wages in the Dutch finance had not been previously affected by the crisis that much (see Table 66).

Incidence of various bonuses remained stable, well below the pre-crisis level (see Table 67).

The share of respondents announcing redundancies was the highest in record in 2013, reaching 60% while only 42% of respondents though their management competent, the lowest share on record (see Table 68).

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

Table 66: Median gross hourly wage

	Year of the survey							
	2006	2007	2008	2009	2010	2011	2012	2013
Median	15.1	16.7	17.2	17.3	16.8	16.9	16.5	15.2
Annual change		10.6%	3.0%	0.6%	-2.9%	0.6%	-2.4%	-7.9%

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

	Employee bonus			
Year	End-of-year bonus	13th-month pay	Profit share	Performance bonus
2007	11%	9%	24%	35%
2008	13%	10%	25%	42%
2009	23%	7%	18%	33%
2010	14%	7%	11%	24%
2011	14%	7%	10%	21%
2012	13%	5%	7%	21%
2013	11%	6%	7%	21%

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

	Past 12 months of organisations			
Year	Announcement of redundancies	Training opportunities	Reorganisation	Competent management strategy
2006	39%	75%	37%	57%
2007	27%	77%	34%	65%
2008	28%	78%	37%	59%
2009	41%	77%	28%	53%
2010	42%	64%	24%	47%
2011	50%	71%	28%	49%
2012	48%	62%	21%	46%
2013	60%	67%	31%	42%

3 Worldwide comparison of occupations in 2013

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

1. Gross and net wage in **international US dollars** express wages 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.

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

Dutch managers remain among the best paid in continental Europe. Their net hourly wage in PPP of 17.1 international US dollars, remains well above comparable countries such as Belgium or Germany, where managers earn about an equivalent of $14 per hour. However, managers in the US are paid even better at $25.5 per hour, and even the US and even in the UK, where the managers earn $17.7 in PPP per hour, even though their hourly wages are lower than the ones enjoyed by Dutch managers. Particularly low manager wages were reported in Brazil, former USSR, Indonesia, Sri Lanka and Egypt.

The situation is similar among professionals. The median wage of Dutch professionals of $14.9 in PPP is lower than that of their colleagues in the USA ($20.4), the UK ($16.9) and even Germany ($16.3). The lowest professional wages are in former USSR, Asian countries other than India and in Egypt.

Just like professional, technicians and associate professionals in the Netherlands earn less than their American, British and German peers, but more than their colleagues in other countries. For clerical occupations we lack the information about the US and UK, nevertheless the data suggest that Dutch clerks are paid slightly better than German ones (see Tables 69 -72).

Table 69: Global comparison of managers' wage

Country	Managers 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 observations
United States	34.5	25.5	5.6	115
Belgium	22.7	13.8	3.4	215
Germany	21.3	13.9	3.2	581
Netherlands	27.8	17.1	4.2	1157
Czech Republic	15.4	12.0	2.3	137
United Kingdom	25.2	17.7	4.3	118
Argentina	18.1	14.3	2.3	249
Brazil	8.3	6.9	1.1	662
Chile	19.0	14.9	3.1	110
Mexico	14.8	11.6	2.8	129
Azerbaijan	7.0	5.9		121
Belarus	4.9	4.1		1117
Kazakhstan	5.6	4.5		736
Russian Federation	7.2	6.0	1.8	376
Ukraine	4.7	3.8	0.9	1040
India	12.4	10.1	2.5	1235
Indonesia	3.5	2.9	0.7	944
Sri Lanka	5.6	4.7	0.8	164
Egypt	4.1	3.1	0.6	100
Kenya	13.5	9.3		138
South Africa	22.4	16.1	4.1	1006

Source: WageIndicator (2012-2013); Purchasing power parity adjustment based on the IMF's WEO database (April 2013); Big Mac wage based on the Economist's Big Mac Index (July 2013)

Table 70: Global comparison of professionals' wage

Country	Professionals 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 observations
United States	29.5	20.4	4.5	178
Belgium	18.5	12.1	2.9	531
Finland	20.2	13.8	3.3	105
Germany	26.5	16.3	3.7	5403
Italy	15.9	11.2	2.5	318
Netherlands	22.2	14.9	3.7	2653
Portugal	12.0	8.9	2.0	138
Slovakia	8.5	6.3	1.0	194
Spain	17.2	13.0	2.7	155
Czech Republic	12.7	9.3	1.8	419
Sweden	20.7	14.3	3.1	114
United Kingdom	23.3	16.9	4.1	180
Argentina	14.9	12.2	1.9	745
Brazil	7.8	6.3	1.0	1145
Chile	12.1	9.9	2.0	290
Colombia	9.7	8.2	1.3	185
Mexico	10.0	8.3	2.0	357
Azerbaijan	5.3	4.4		326
Belarus	4.1	3.4		4407
Kazakhstan	4.3	3.5		2281
Russian Federation	5.3	4.5	1.3	1199
Ukraine	3.9	3.1	0.7	2839
India	10.5	8.8	2.1	3414
Indonesia	2.7	2.3	0.6	1218
Pakistan	4.0	3.7	0.5	163
Sri Lanka	4.0	3.6	0.6	448
Egypt	2.3	1.3	0.2	482
Ghana	9.2	6.4		147
Kenya	6.5	4.7		272
Mozambique	5.5	5.1		134
South Africa	19.3	14.0	3.5	1949
Tanzania	9.0	6.3		148

Source: WageIndicator (2012-2013); Purchasing power parity adjustment based on the IMF's WEO database (July 2013); Big Mac wage based on the Economist's Big Mac Index (July 2013)

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

Country	Technicians and associate professionals Median gross hourly wage in international US dollars	Median net hourly wage in international US dollars	Median amount of Big Macs per hour	Number of observations
United States	24.5	17.5	3.8	136
Belgium	17.2	11.3	2.7	522
Germany	21.4	13.9	3.2	2637
Italy	15.9	10.9	2.5	166
Netherlands	19.3	13.5	3.3	2788
Slovakia	7.2	5.4	0.8	212
Czech Republic	10.8	8.0	1.5	273
United Kingdom	19.1	14.4	3.5	107
Argentina	11.0	9.0	1.4	526
Brazil	4.8	3.9	0.6	1265
Chile	7.6	6.2	1.3	174
Colombia	5.2	4.7	0.7	101
Mexico	5.8	5.3	1.3	162
Azerbaijan	5.1	4.5		191
Belarus	3.8	3.2		3250
Kazakhstan	3.8	3.2		2249
Russian Federation	4.8	4.1	1.2	836
Ukraine	3.3	2.7	0.6	3090
India	6.3	5.4	1.3	938
Indonesia	2.6	2.1	0.5	1010
Sri Lanka	2.9	2.6	0.4	190
Egypt	2.2	1.5	0.3	169
Kenya	4.5	3.2		139
Mozambique	4.2	3.4		121
South Africa	12.7	9.9	2.5	1523

Source: WageIndicator (2012-2013); 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 2013)

Table 72: Global comparison of clerical support workers' wage.

Country	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 observations
Belgium	15.2	10.6	2.6	485
Germany	17.8	11.7	2.7	2943
Italy	13.2	9.5	2.2	191
Netherlands	16.6	12.3	3.0	2648
Slovakia	6.9	5.1	0.8	176
Czech Republic	8.6	6.5	1.2	233
Argentina	9.0	7.4	1.2	754
Brazil	3.3	2.8	0.4	1574
Chile	5.4	4.3	0.9	229
Colombia	4.2	3.9	0.6	169
Mexico	4.5	3.8	0.9	264
Azerbaijan	5.8	4.7		150
Belarus	3.4	2.9		1853
Kazakhstan	3.3	2.8		1222
Russian Federation	3.8	3.3	1.0	479
Ukraine	3.1	2.5	0.6	1680
India	3.3	2.9	0.7	522
Indonesia	2.2	1.8	0.5	1009
Sri Lanka	2.2	1.8	0.3	117
Egypt	2.1	1.4	0.3	113
Mozambique	3.5	2.8		107
South Africa	8.6	7.0	1.8	1225

Source: WageIndicator (2012-2013); 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 2013)

Appendix

Table 73: Structure of the whole sample in the Netherlands in the period 2012 - 2013

	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, forestry, fishing	5380	20%	52%	28%	32%	35%	9%	14%	10%	23%	21%	19%	38%	26%
Construction, technical consultancy	23257	18%	44%	38%	15%	35%	16%	20%	14%	18%	19%	21%	42%	17%
Education, research	9670	4%	22%	73%	7%	28%	9%	28%	29%	25%	17%	19%	39%	60%
Financial services, banking, insurance	15841	5%	38%	58%	16%	20%	8%	20%	36%	25%	21%	19%	36%	49%
Healthcare, caring services, social work	27346	10%	49%	41%	15%	21%	8%	18%	38%	29%	20%	17%	34%	79%
Hospitality, catering, tourism	15608	19%	57%	24%	22%	41%	15%	14%	8%	29%	25%	21%	26%	53%
ICT services	21000	4%	34%	62%	14%	30%	13%	19%	24%	26%	24%	20%	30%	22%
Legal and market consultancy, business activities	21737	5%	35%	60%	24%	34%	12%	16%	14%	25%	22%	20%	34%	60%
Manufacturing	30866	13%	41%	46%	7%	26%	15%	30%	22%	17%	16%	18%	49%	20%
Transport, logistics, communication	13644	22%	48%	29%	10%	22%	14%	26%	28%	24%	18%	18%	40%	25%
Total	184349	11%	42%	47%	15%	28%	12%	21%	24%	24%	20%	19%	37%	41%

	Region

	North	East	West	South
Agriculture, forestry, fishing	11%	25%	41%	24%
Construction, technical consultancy	8%	22%	48%	22%
Education, research	9%	20%	52%	19%
Financial services, banking, insurance	7%	17%	57%	19%
Healthcare, caring services, social work	10%	22%	48%	21%
Hospitality, catering, tourism	8%	18%	54%	20%
ICT services	6%	18%	57%	19%
Legal and market consultancy, business activities	7%	17%	57%	19%
Manufacturing	9%	23%	38%	30%
Transport, logistics, communication	6%	18%	52%	24%
Total	8%	20%	50%	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 profession groups

Managers	Share of profession	**Professionals**	Share of profession
Business services and administration managers	16.3%	Personnel and careers professionals	7.5%
Human resource managers	12.8%	Accountants	6.5%
Managing directors and chief executives	12.5%	University and higher education teachers	5.7%
Sales and marketing managers	11.3%	Systems analysts	5.3%
Finance managers	8.5%	Advertising and marketing professionals	4.5%
Technicians and associate professionals	Share of profession	**Clerical support workers**	Share of profession
Accounting associate professionals	26.3%	General office clerks	29.9%
Administrative and executive secretaries	6.5%	Accounting and bookkeeping clerks	9.8%
Commercial sales representatives	6.1%	Secretaries	9.1%
Information and communications technology sales professionals	5.0%	Statistical, finance and insurance clerks	8.0%
Draughtspersons	4.6%	Stock clerks	6.9%

Table 75: Most frequented professions in examined sectors

Agriculture, forestry, fishing	Hospitality, catering, tourism
Gardeners, horticultural and nursery growers	Cooks
Agricultural and industrial machinery mechanics	Waiters
Mobile farm and forestry plant operators	Hotel receptionists
Livestock and dairy producers	Restaurant managers
Farming, forestry and fisheries advisers	Bartenders
Construction, technical consultancy	ICT services
Construction supervisors	Systems analysts
Carpenters and joiners	Applications programmers
Electrical mechanics and fitters	Graphic and multimedia designers
Painters and related workers	Web and multimedia developers
Plumbers and pipe fitters	Computer network professionals
Education, research	Legal and market consultancy, business activities
Primary school teachers	Advertising and marketing professionals
University and higher education teachers	Employment agents and contractors
Secondary education teachers	Sales and marketing managers
Vocational education teachers	Legal and related associate professionals
Education managers	Advertising and public relations managers
Financial services, banking, insurance	Manufacturing
Statistical, finance and insurance clerks	Mechanical engineering technicians
Accountants	Agricultural and industrial machinery mechanics
Insurance representatives	Welders and flame cutters
Bank tellers and related clerks	Chemical processing plant controllers
Financial and investment advisers	Electrical mechanics and fitters
Healthcare, caring services, social work	Transport, logistics, communication
Health care assistants	Heavy truck and lorry drivers
Dental assistants and therapists	Supply, distribution and related managers
Physiotherapists	Freight handlers
Nursing professionals	Motor vehicle mechanics and repairers
Medical assistants	Car, taxi and van drivers

Table 76: Selected indicators in overall, gender-based and age-based categorisation

Indicator	Overall 2012	Overall 2013	By gender	2012	2013	By age	2012	2013
Eager to find a new job in the next 12 months	45.4%	49.5%	Male	43.8%	46.0%	20 - 29	44.3%	46.7%
						30 - 39	44.8%	49.4%
			Female	47.1%	53.4%	40 - 49	46.7%	53.5%
						50+	46.2%	51.0%
Satisfied with job security	72.5%	71.3%	Male	72.3%	70.4%	20 - 29	74.2%	71.8%
						30 - 39	72.8%	70.3%
			Female	72.7%	72.3%	40 - 49	71.5%	71.4%
						50+	70.6%	72.1%
Received annual bonus	19.5%	19.1%	Male	17.2%	16.9%	20 - 29	15.6%	14.8%
						30 - 39	18.9%	19.2%
			Female	23.6%	22.2%	40 - 49	20.5%	20.4%
						50+	26.3%	26.4%
Received performance bonus	10.7%	10.9%	Male	13.4%	13.0%	20 - 29	8.9%	9.5%
						30 - 39	12.4%	12.6%
			Female	7.4%	8.1%	40 - 49	13.1%	12.5%
						50+	9.0%	9.8%
Expecting a promotion	62.6%	60.1%	Male	63.0%	64.4%	20 - 29	74.0%	70.2%
						30 - 39	65.0%	66.1%
			Female	62.2%	55.2%	40 - 49	55.9%	55.2%
						50+	46.0%	35.3%
Expecting a pay raise	51.6%	47.8%	Male	53.7%	50.3%	20 - 29	70.8%	62.6%
						30 - 39	56.2%	56.0%
			Female	49.3%	45.1%	40 - 49	40.6%	34.7%
						50+	26.0%	22.7%
Satisfied with life in general	90.5%	90.6%	Male	90.7%	91.3%	20 - 29	92.2%	91.4%
						30 - 39	89.9%	90.0%
			Female	90.4%	89.6%	40 - 49	89.8%	90.1%
						50+	89.9%	90.6%
Expecting employment at the same employer	76.7%	72.2%	Male	77.4%	74.6%	20 - 29	74.0%	70.7%
						30 - 39	74.1%	73.4%
			Female	75.9%	69.3%	40 - 49	78.1%	70.9%
						50+	82.3%	74.6%
Satisfied with job	64.3%	60.4%	Male	65.3%	61.6%	20 - 29	64.4%	62.6%
						30 - 39	62.0%	56.2%
			Female	62.9%	59.0%	40 - 49	64.5%	59.9%
						50+	67.0%	63.6%
Expecting post redundancy	12.0%	16.6%	Male	11.3%	13.8%	20 - 29	8.3%	15.0%
						30 - 39	11.7%	12.8%
			Female	12.9%	19.9%	40 - 49	15.1%	19.2%
						50+	15.5%	22.8%

Table 77: Income distribution per quartiles

Sector	p25	median	p75
Agriculture, forestry, fishing	9.90	12.80	17.00
Construction, technical consultancy	12.12	14.80	18.84
Education, research	13.28	16.40	21.94
Financial services, banking, insurance	12.16	15.20	20.79
Healthcare, caring services, social work	11.49	14.40	18.76
Hospitality, catering, tourism	7.85	10.40	13.37
ICT services	12.16	15.10	20.21
Legal and market consultancy, business activities	13.28	14.90	21.65
Manufacturing	13.28	16.30	21.65
Transport, logistics, communication	10.64	13.30	17.96

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