

SALARY SURVEY

January 2009

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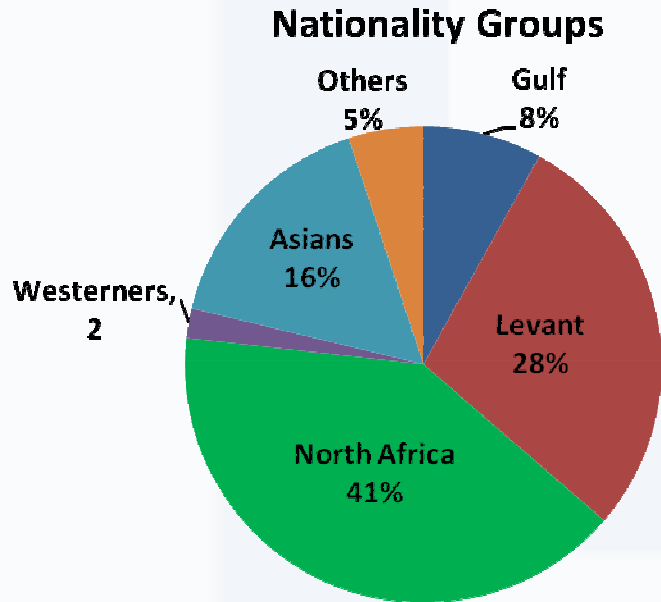
DEMOGRAPHICS

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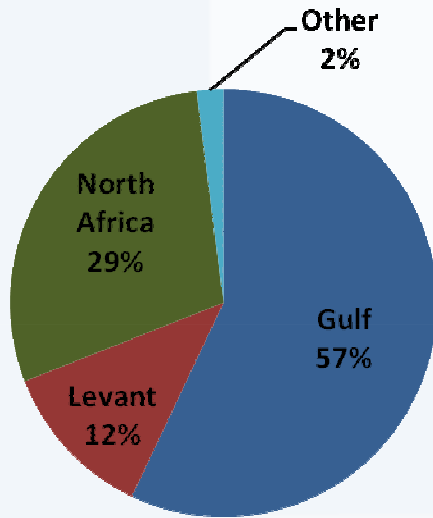
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Respondent Profile - Nationality

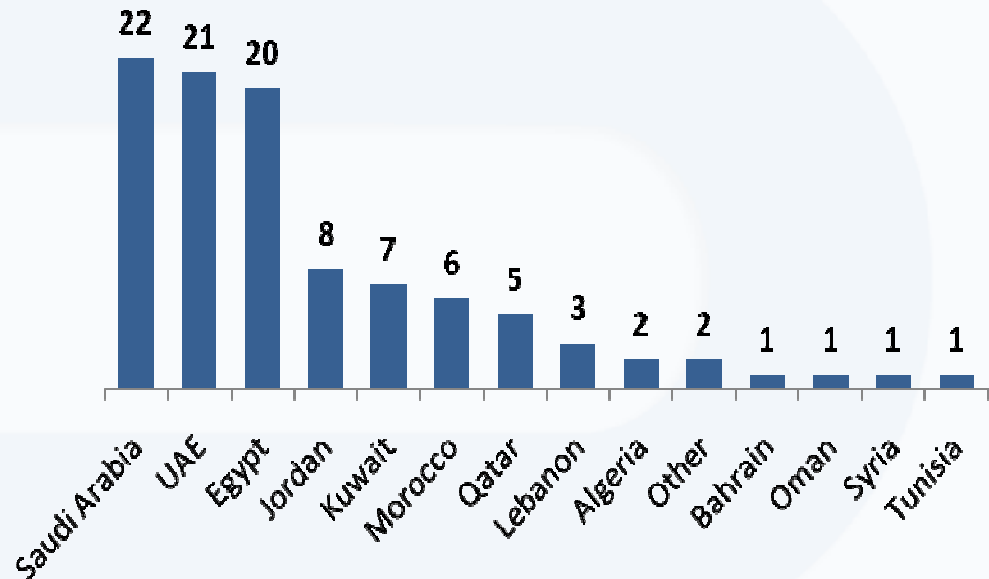


Respondent Profile - Country

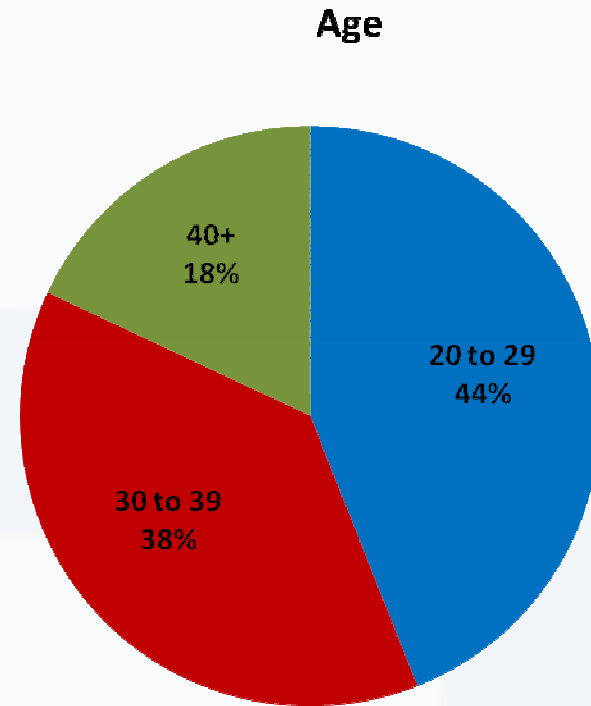
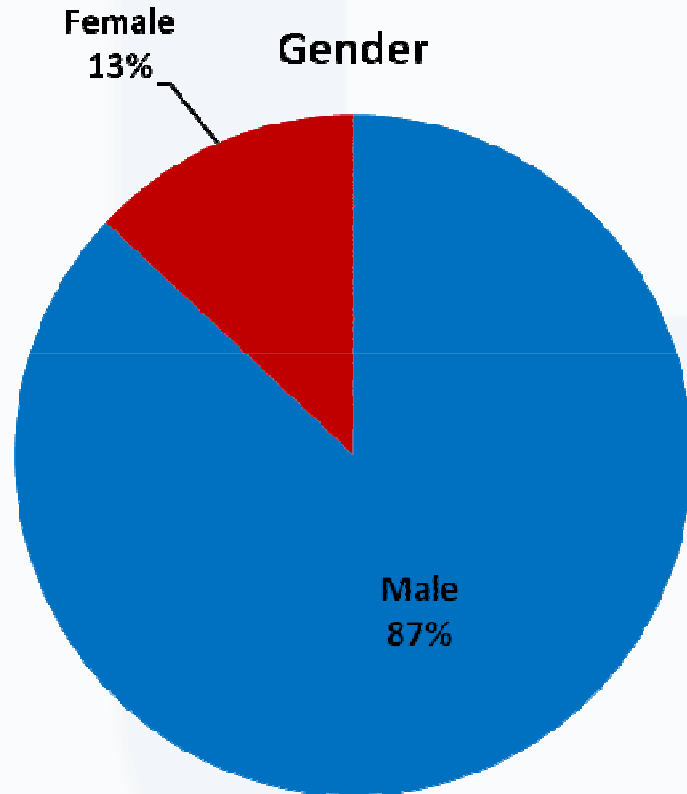
Country of Residence (Grouped)



Country of Residence



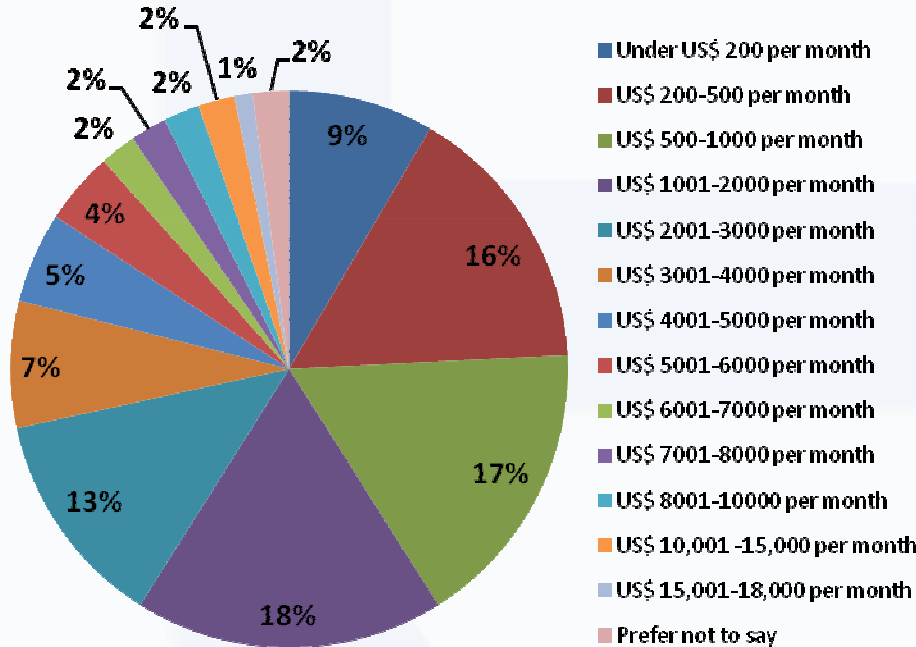
Respondent Profile - Personal



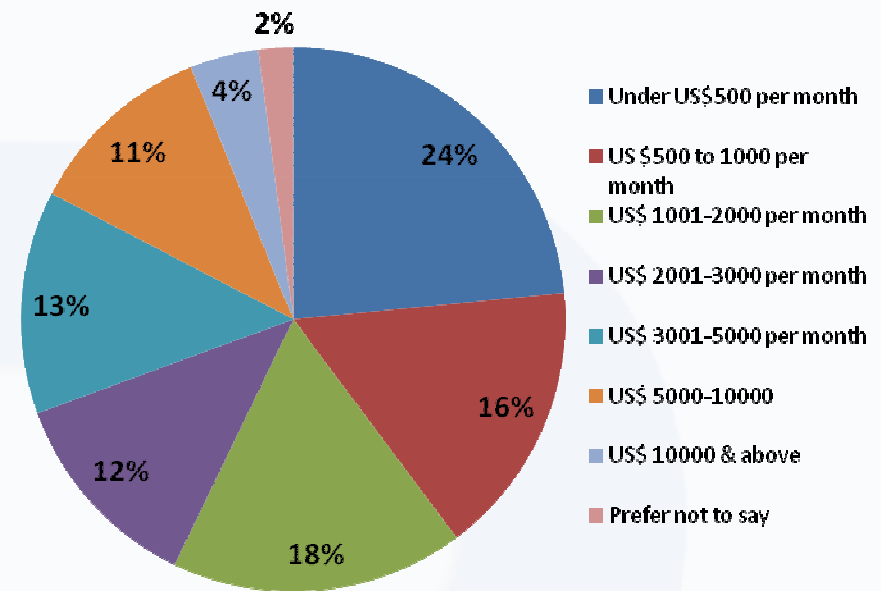
Base: 13881

Respondent Profile - Income

Income



Income Groups

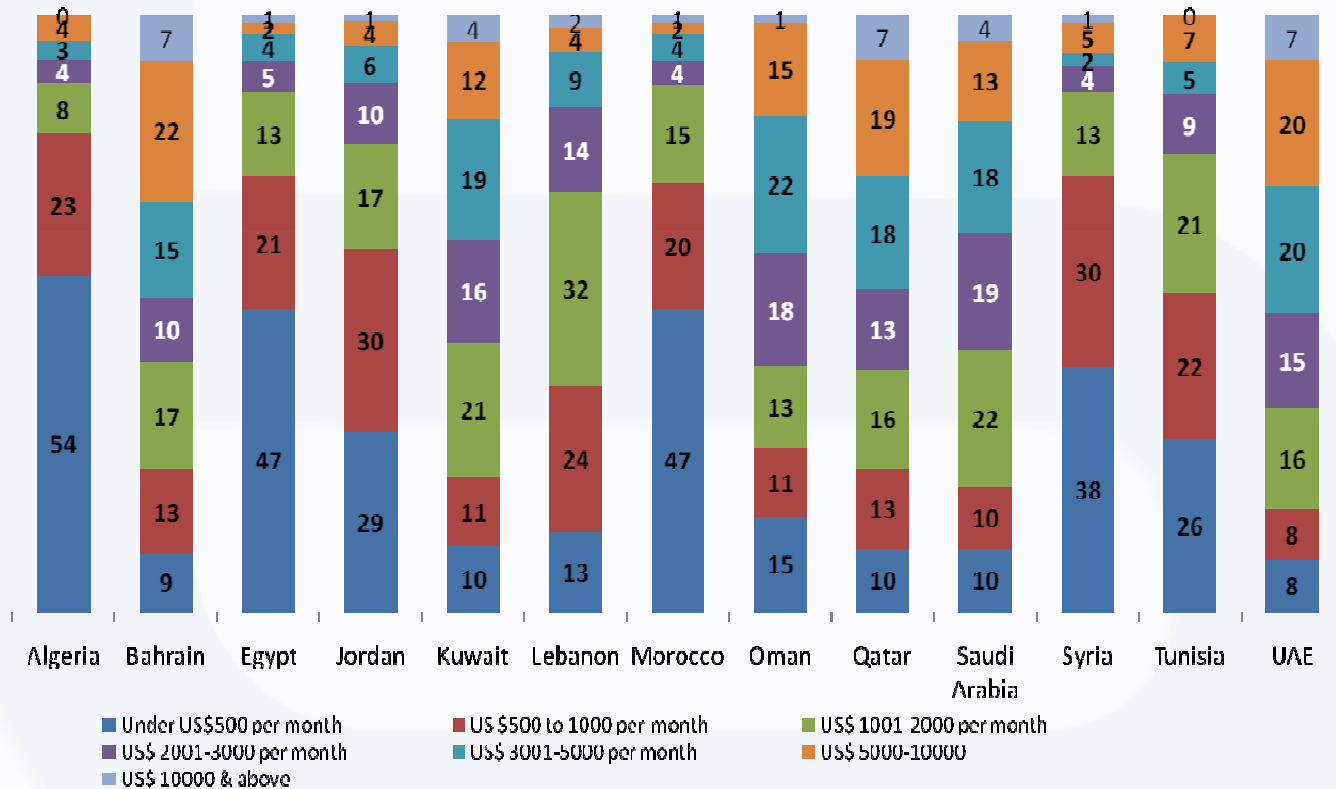


Base: 13881

Personal income by country

- Algeria with the lowest personal income followed by Egypt & Morocco.
- Bahrain, UAE and Qatar with the highest earners.

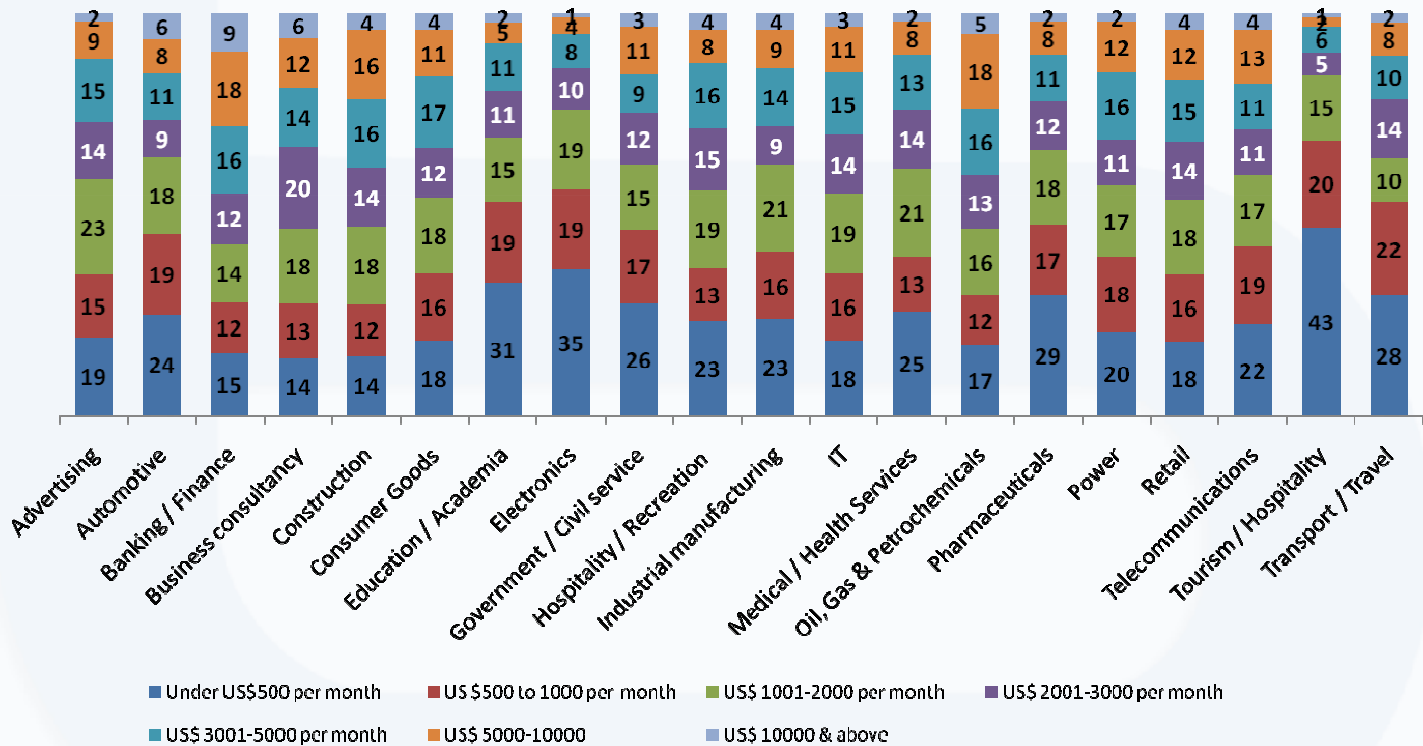
Q: Which of the following income levels does your personal monthly income fall into?



Personal income by industry

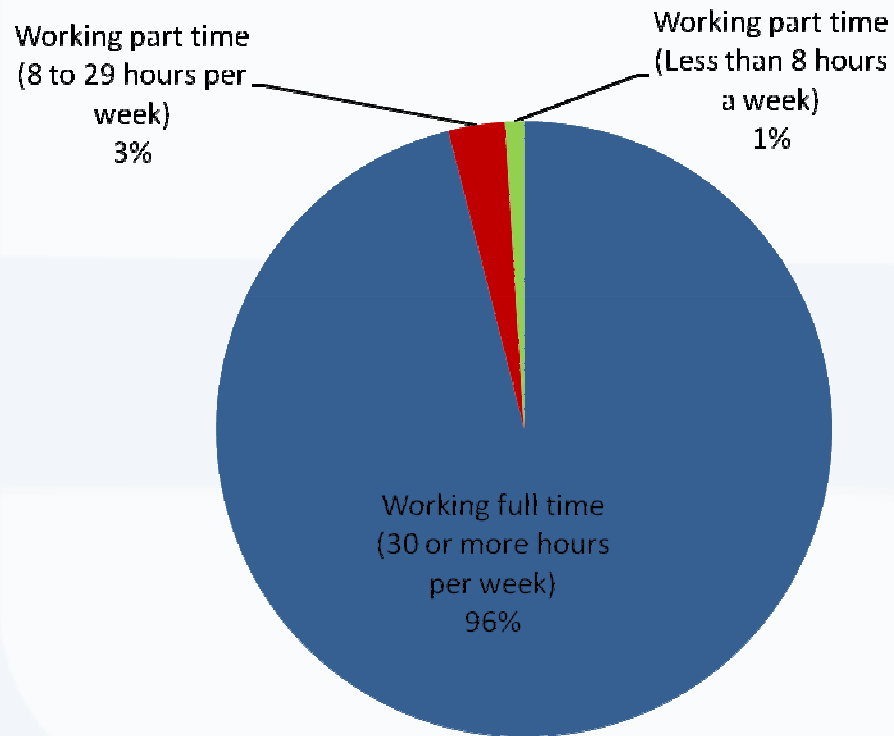
- Banking and finance still has the highest number of top earners.
- Tourism / Hospitality relatively low in the salary ladder.

Q: Which of the following income levels does your personal monthly income fall into?

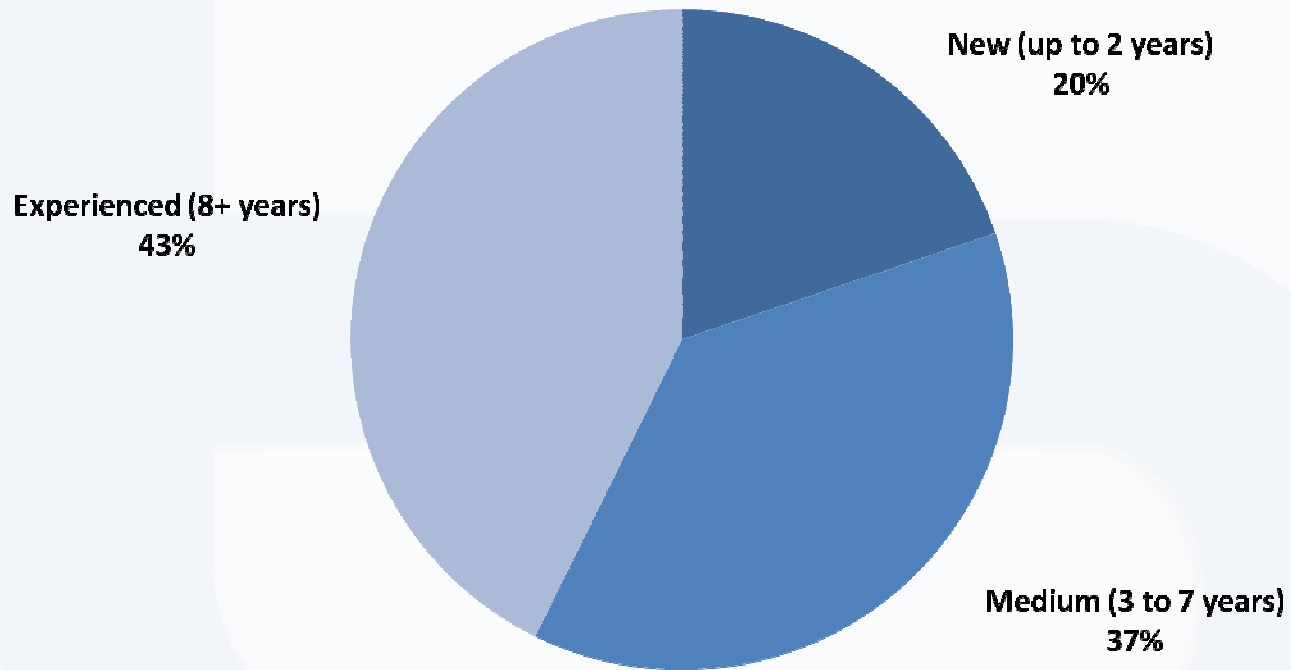


Base: Advertising (259), Automotive (273), Banking/Finance (1011), Business Consultancy (374), Construction (1807), Consumer Goods (553), Education/Academia (350), Electronics (312), Government/ Civil Service (224), Hospitality / Recreation / Entertainment (212), Industrial manufacturing (656) IT (1311), Medical / Health Services (343), Oil, Gas & Petrochemicals (619), Pharmaceuticals (258), Power (248), Retail (398), Telecommunications (855), Tourism/Hospitality (279), Transport / Travel (197)

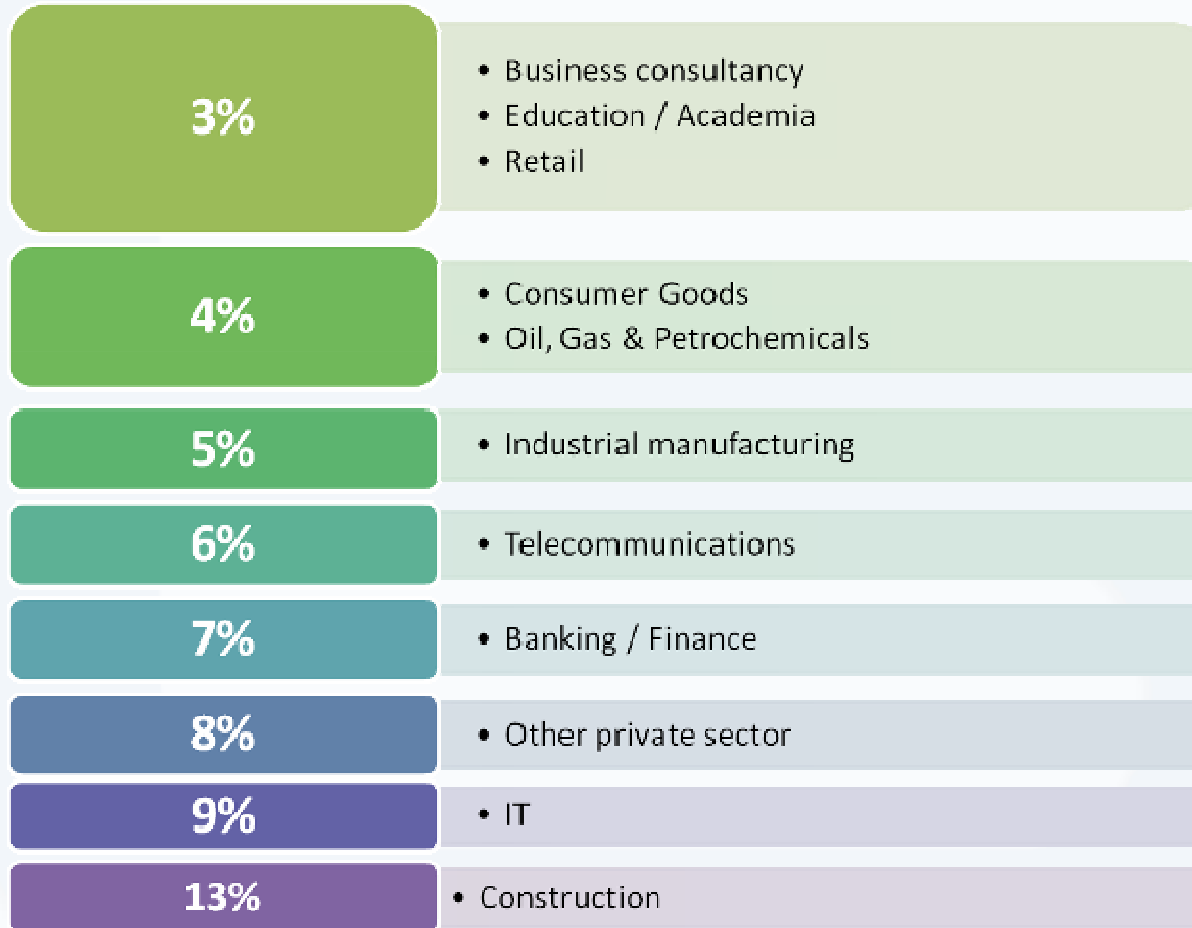
Respondent Profile- Working Status



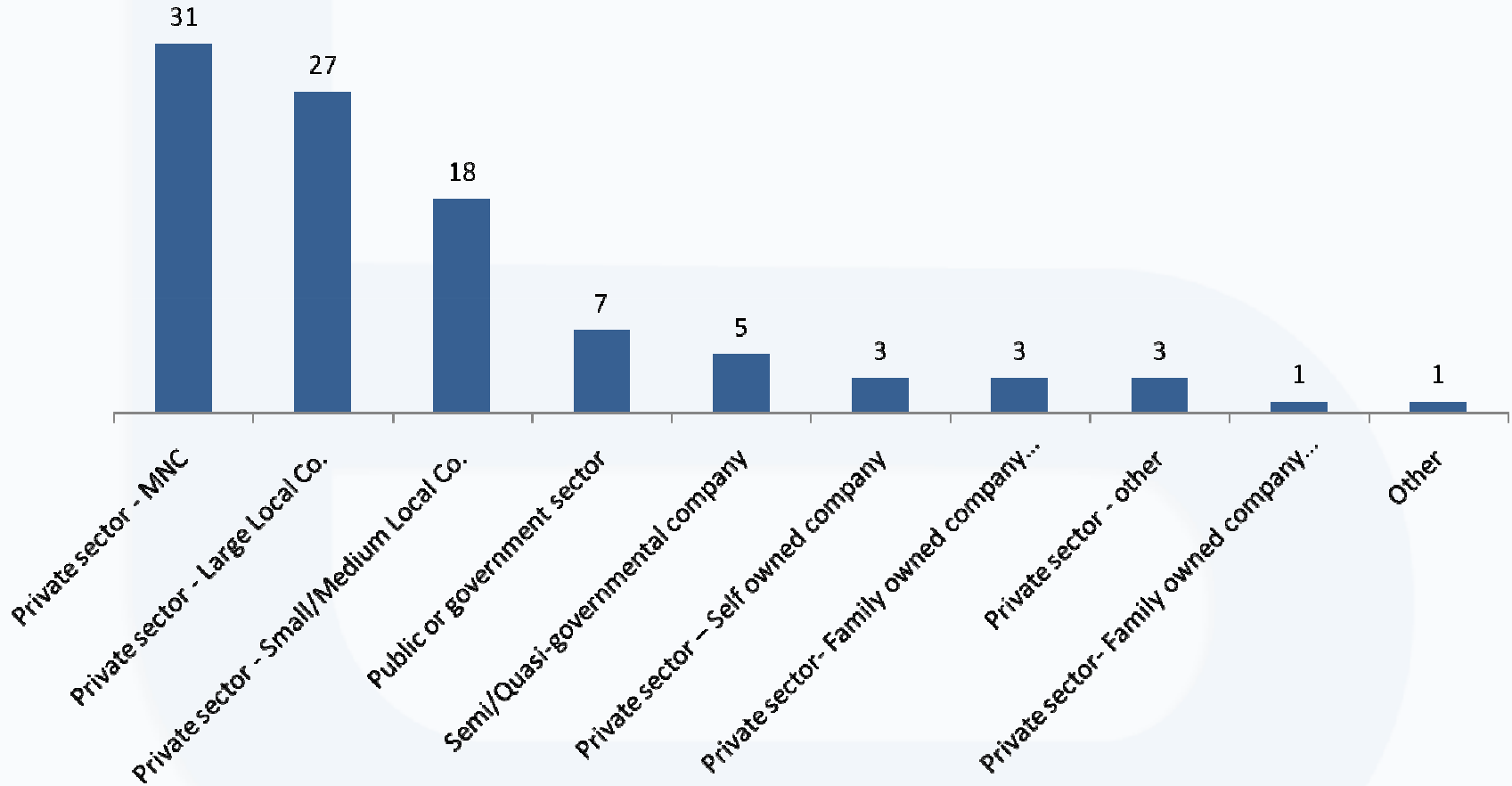
Total Work Experience



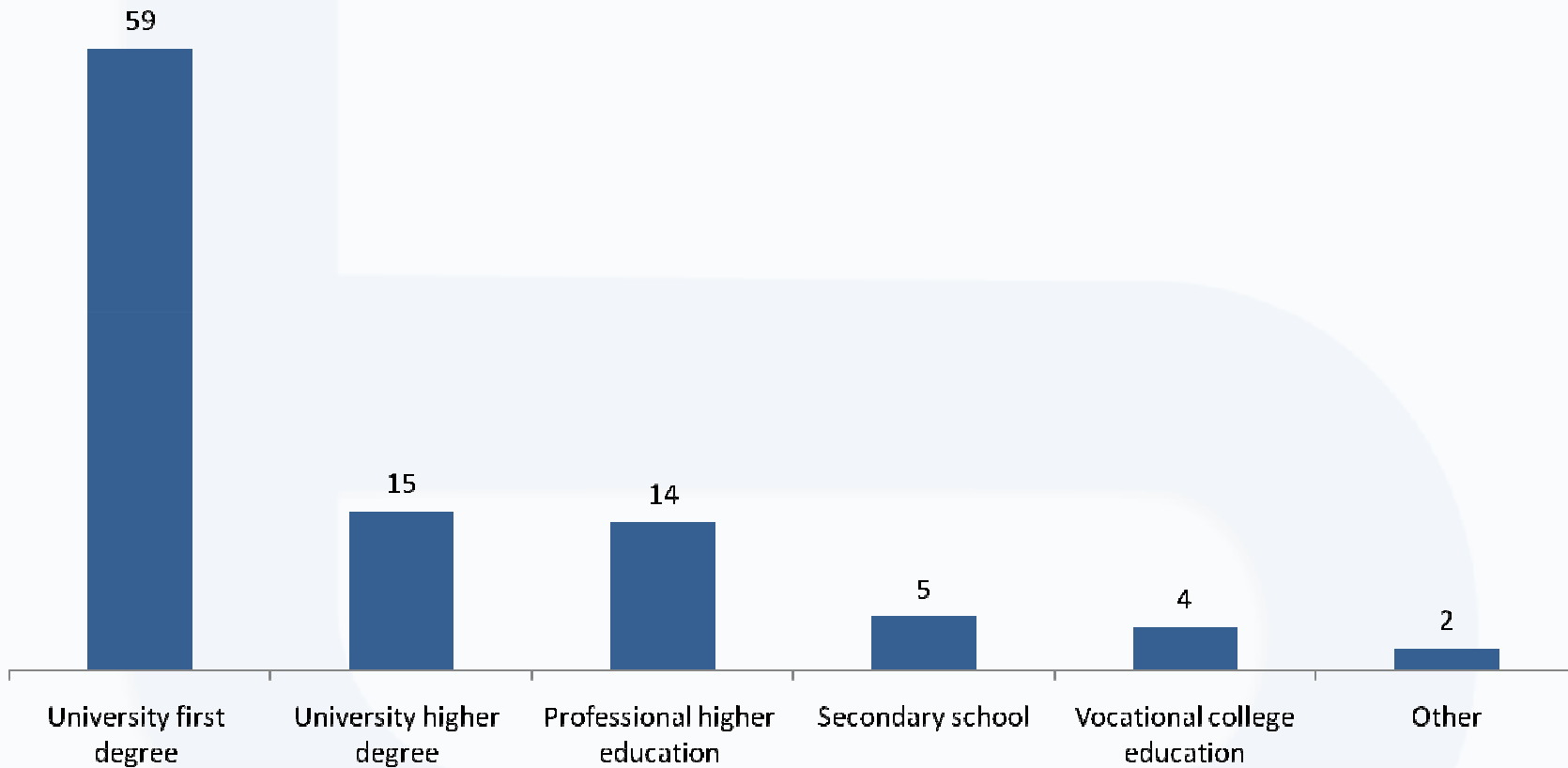
Industries currently worked in



Sector currently worked in

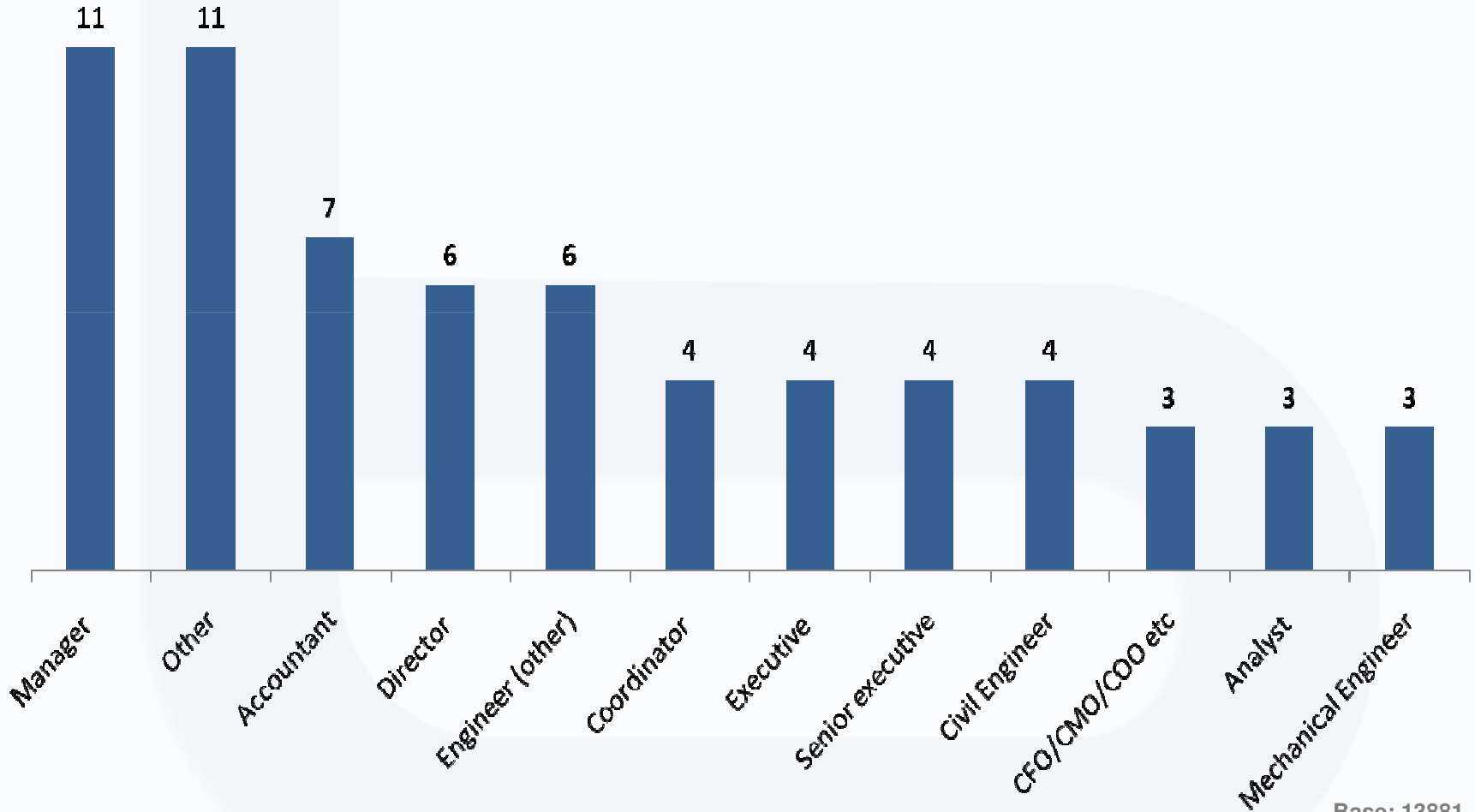


Educational Level



Base: 13881

Positions worked in



Base: 13881

REPORT FINDINGS

ABOUT THE RESPONDENTS

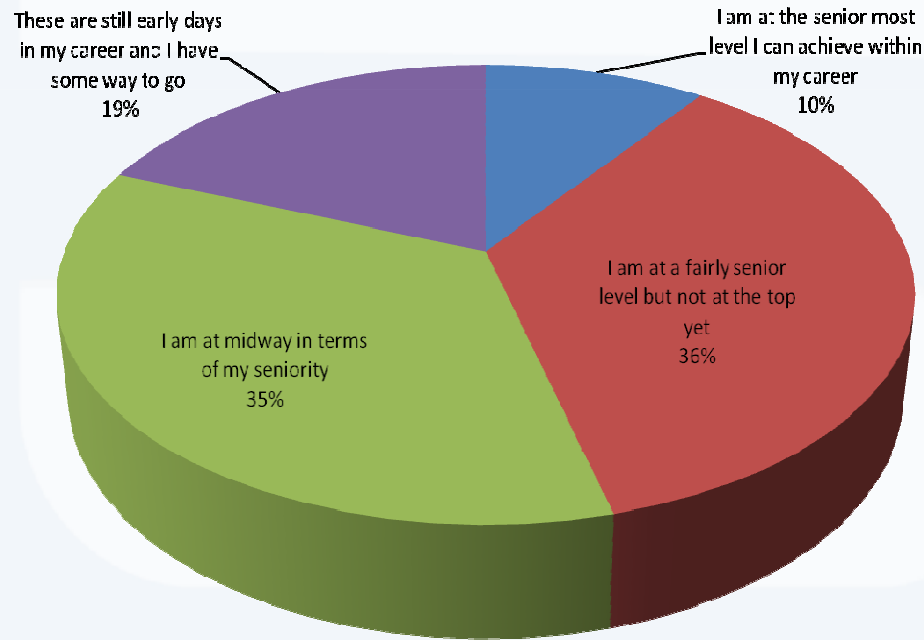
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Level of seniority

- Quite a healthy number of people (71%) from those fairly senior to midway in their career.

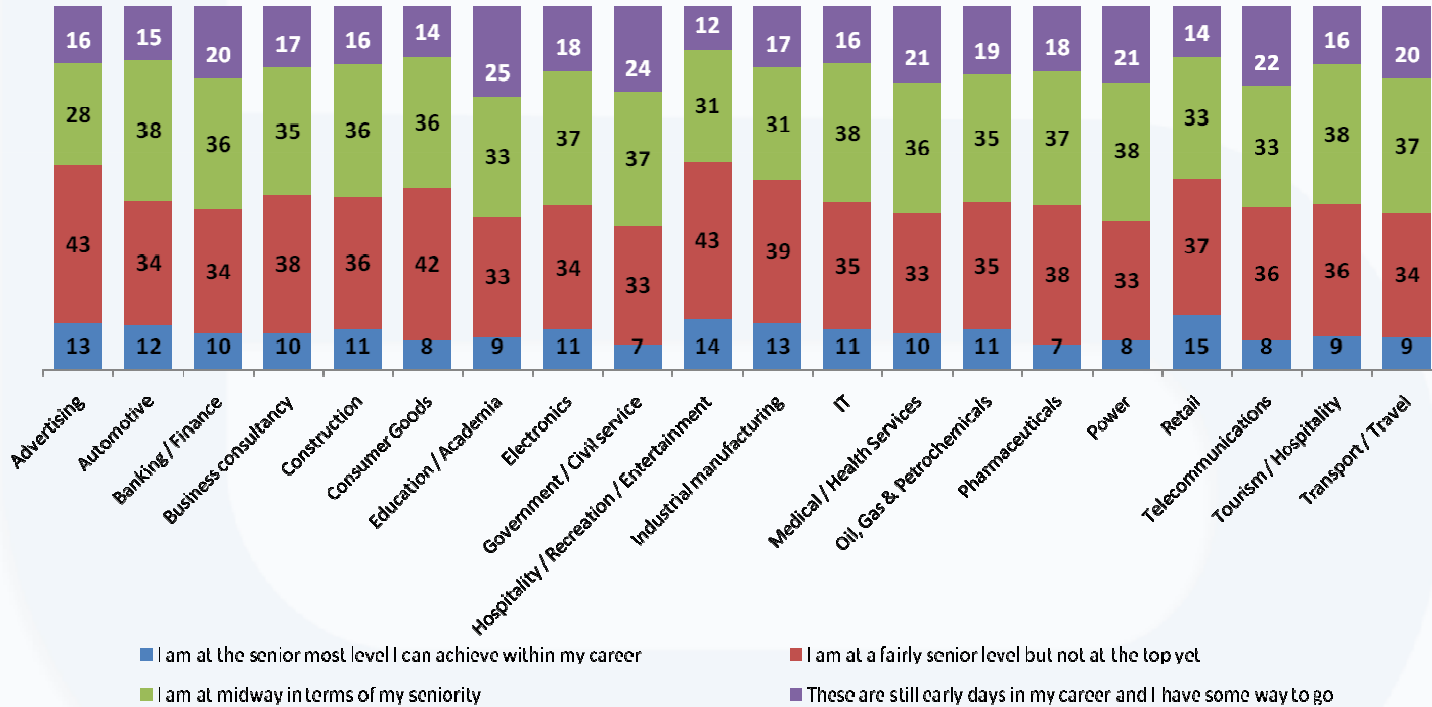
Q: Can you tell me which of the following best describes the level you have attained so far within your career path?



Level attained by industry

- Education / Academia seem to have the highest percentage of new staff.
- Could this be a result of older more experienced / qualified teachers moving on to better paying jobs?

Q: Can you tell me which of the following best describes the level you have attained so far within your career path?

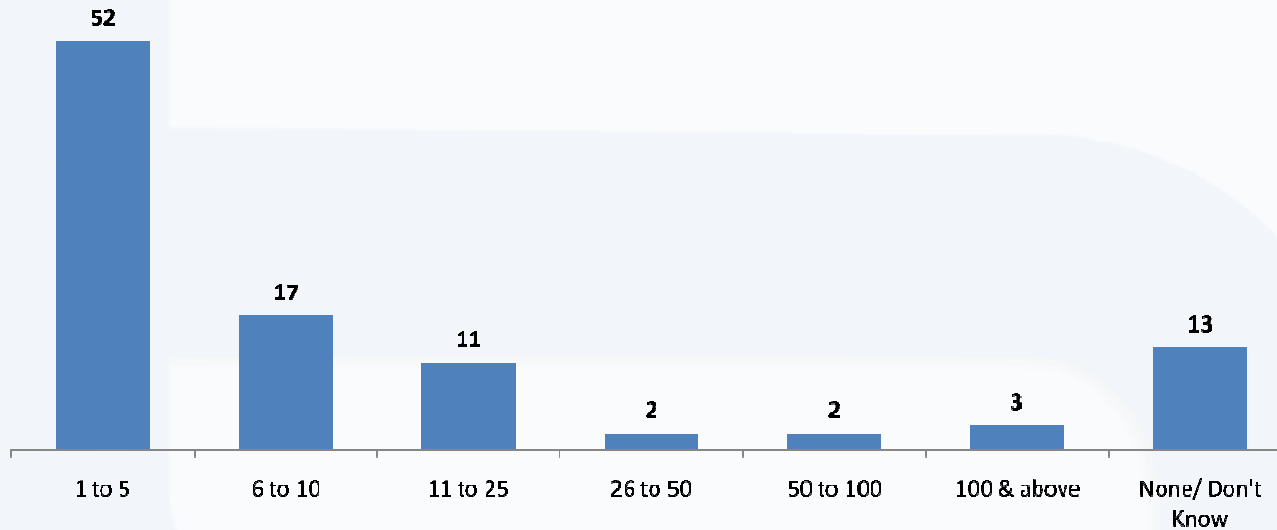


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Number of people working under the respondent

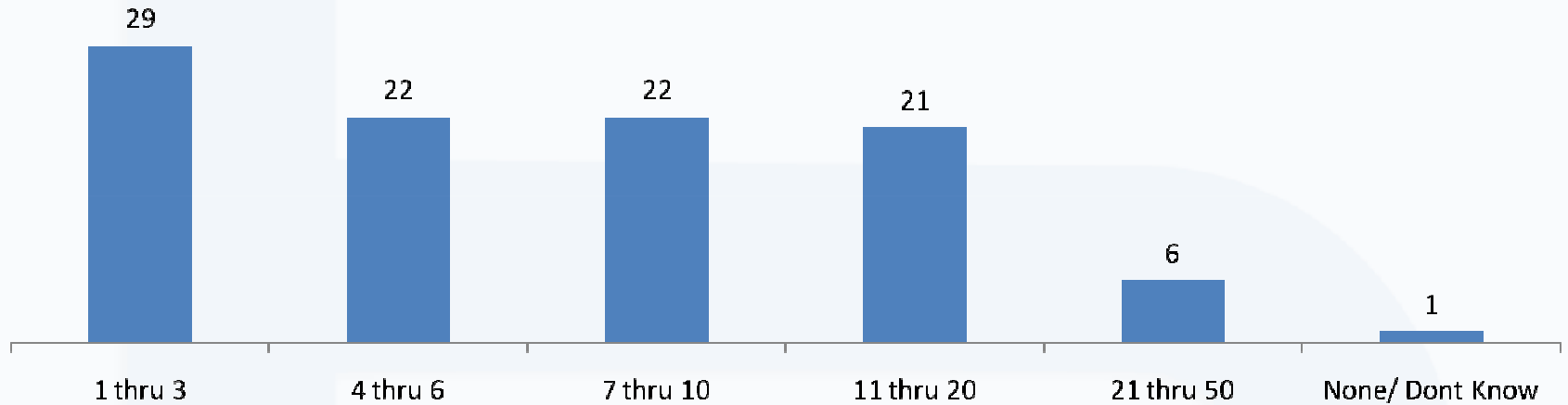
- Most people have 1 to 5 people working under them.

Q: Can you tell us how many people currently report to you both directly and indirectly?



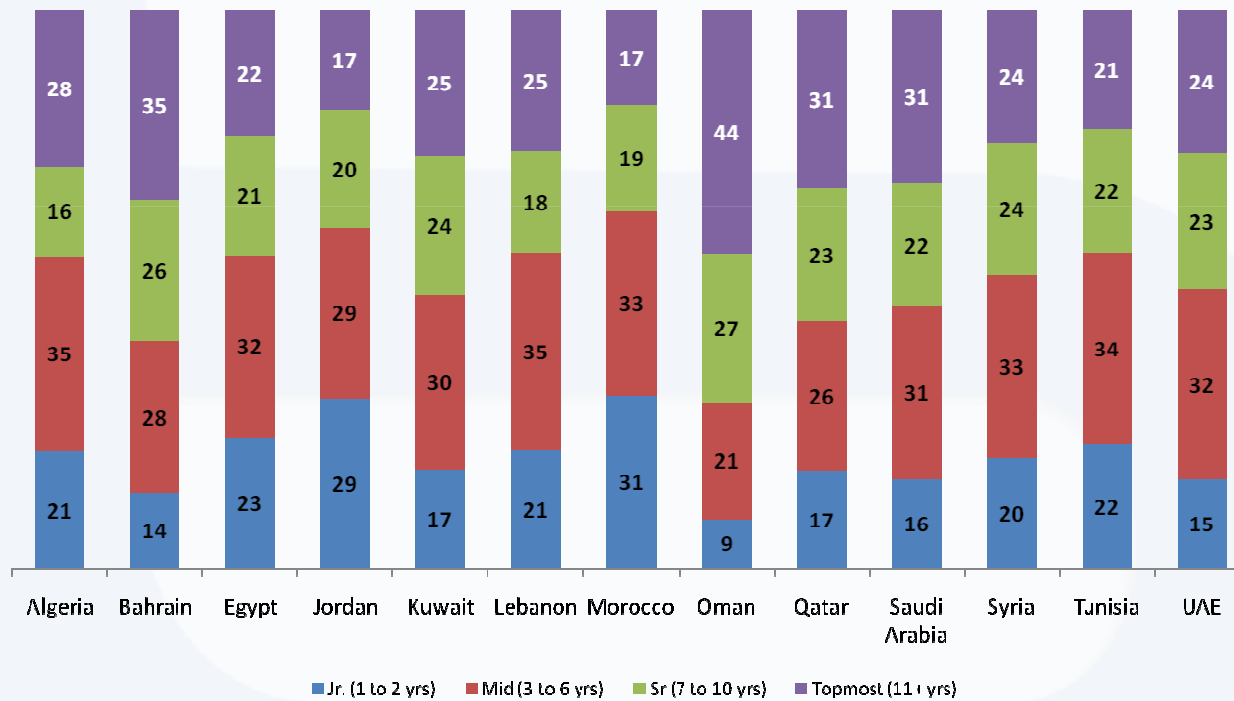
Number of years of service in the present career path

Q: Can you please tell us the total number of years you have been working in your current career path?



Number of years of service in the present career path

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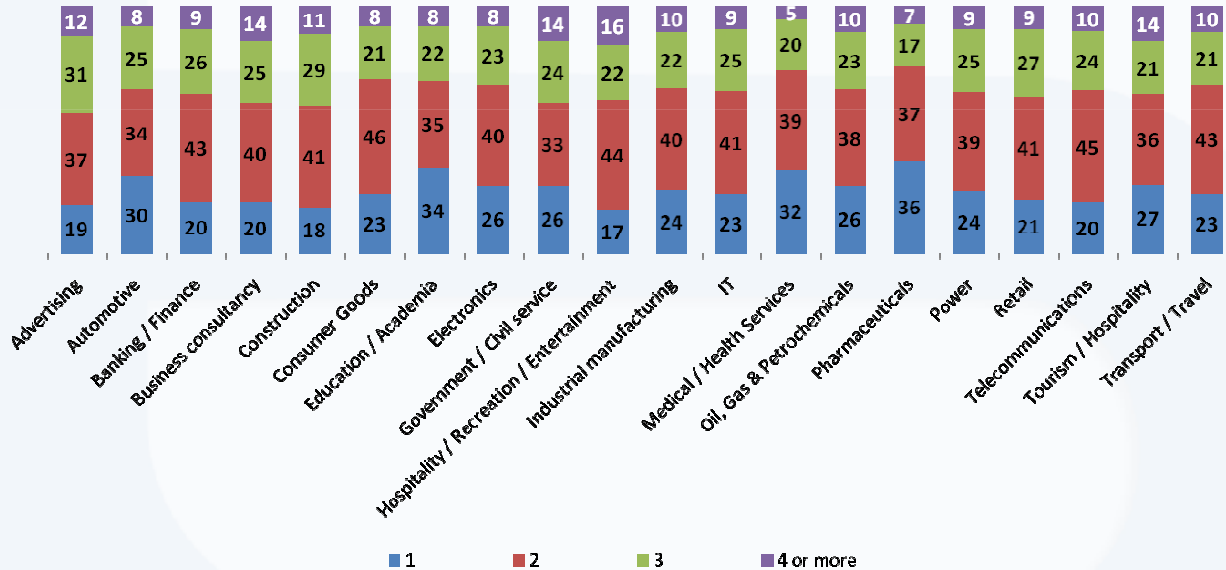


Base: Algeria (313), Bahrain (182), Egypt (2828), Jordan (1080), Kuwait (1004), Lebanon (385), Morocco (786), Oman (142), Qatar (630), KSA (3094), Syria (166), Tunisia (91), UAE (2895)

Number of jobs held in the past 5 years

- Specialist industries like medicine seem to have the strongest retention with the highest numbers who have only had 1 or 2 jobs in the past 5 years.

Q: How many jobs have you held over the past 5 years?

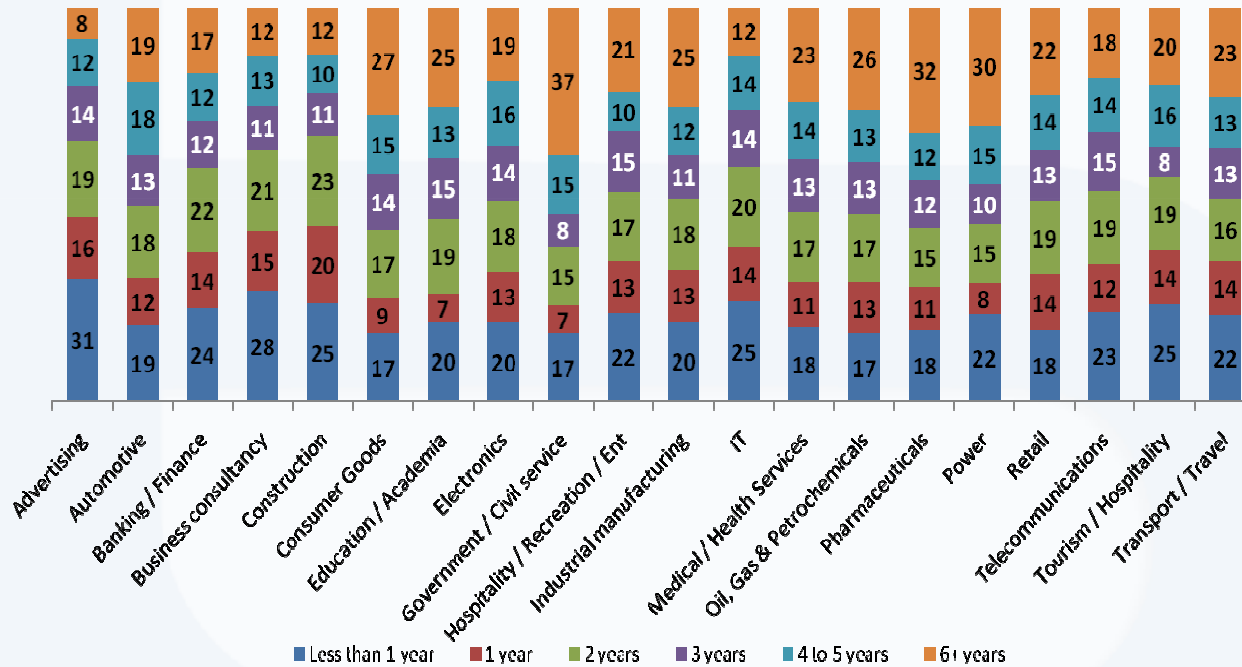


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Number of years working with the current employer

- As expected those working in Government / Civil service have the highest numbers for service to the same organisation for 6 or more years.

Q: Can you please tell us the total duration you have been working with your current employer?

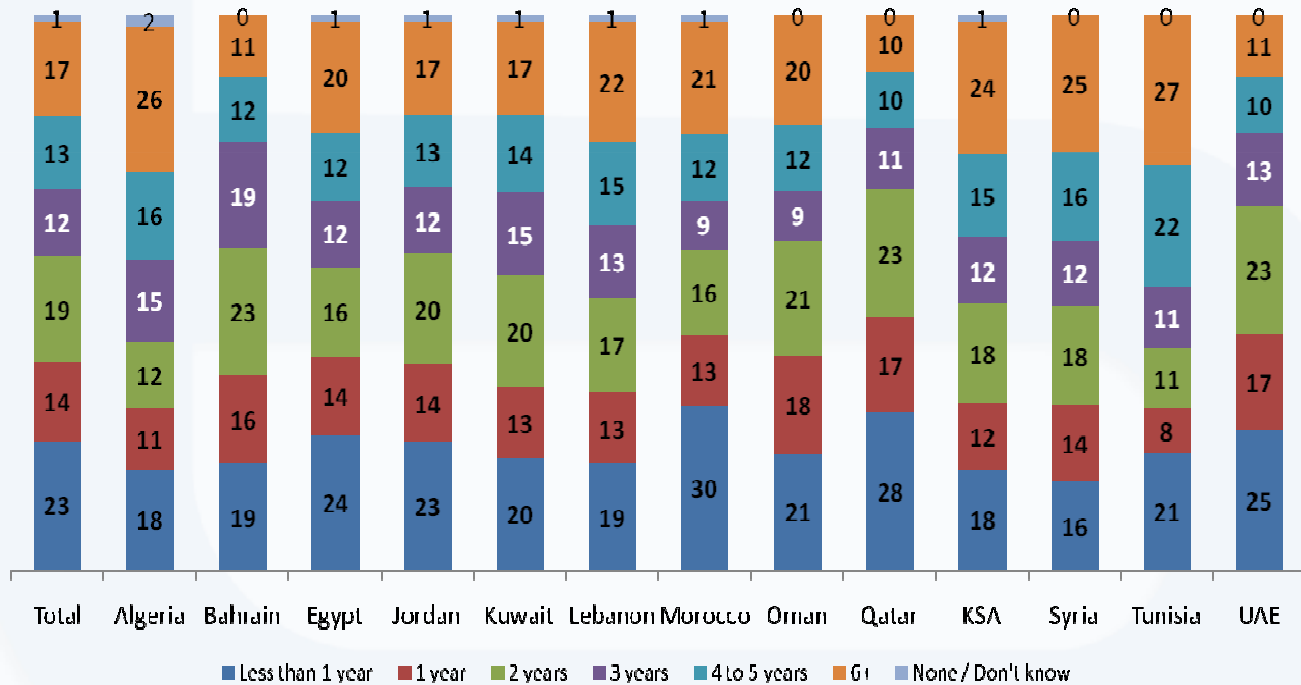


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Number of years working with the current employer

- Quite a high number (23%) have recently taken up new employment in the last 1 year.
- However, quite a few people have worked in a company for 6 or more years (17%).
- Tunisia, Algeria & Syria enjoy the highest employee loyalty.

Q: Can you please tell us the total duration you have been working with your current employer?

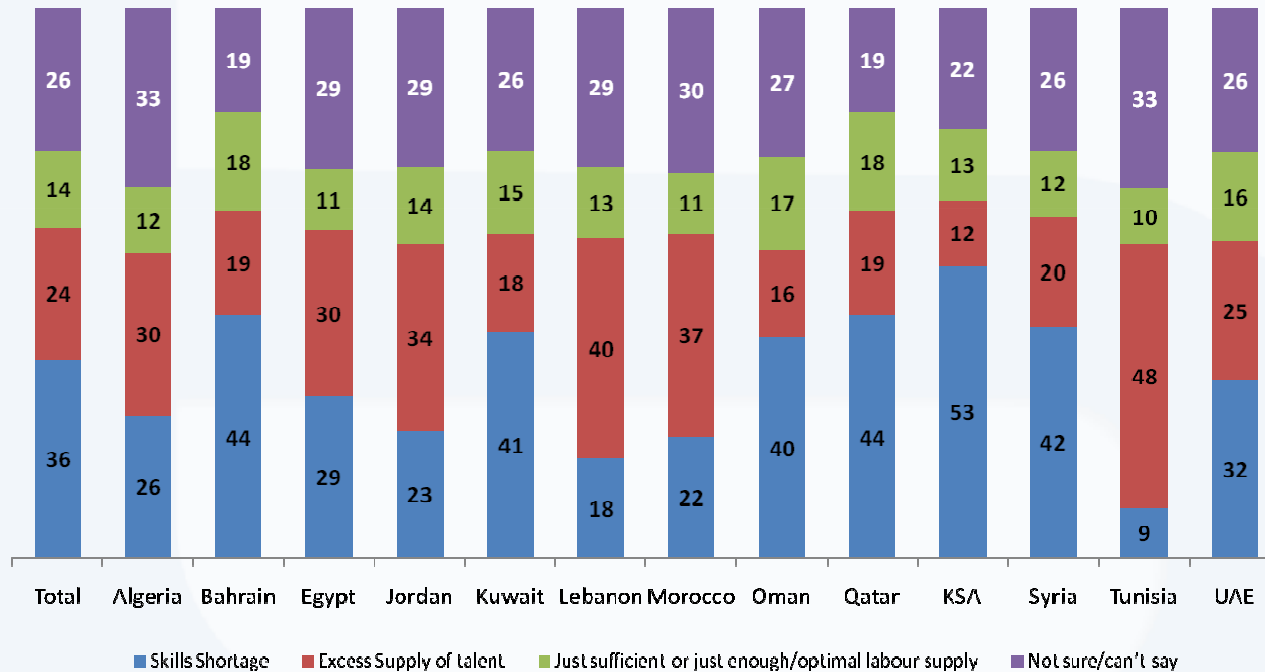


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Skills/labour supply status in country of residence

- KSA has a large skill shortage. Probably the next big job market in future followed by Qatar & Bahrain.

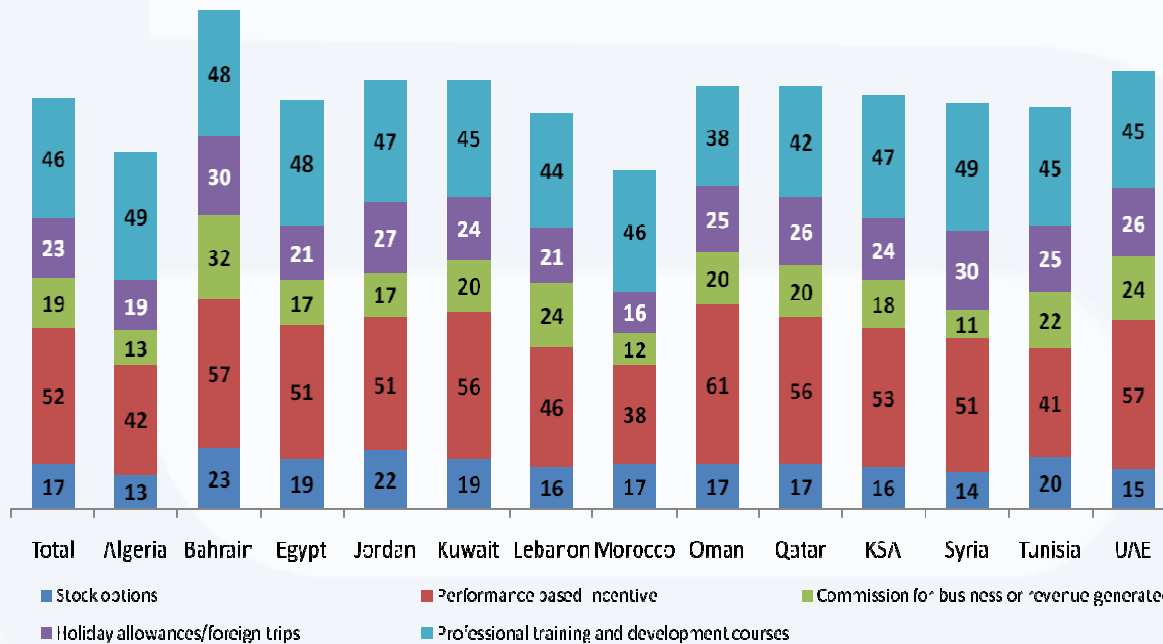
Q: Do you believe that in your country of residence there is a...



Attractive incentives to include in compensation package in lieu of a proportion of the salary

- Most employees would greatly appreciate performance based incentives which will validate their work and give them due recognition.
- Apart from this, they would also like regular professional / developmental training, holiday allowance or foreign trips, commissions and finally stock options.

Q: Which of the following do you think would be attractive incentives for you to be included in your compensation package in lieu of a proportion of your salary?



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CURRENT PACKAGE

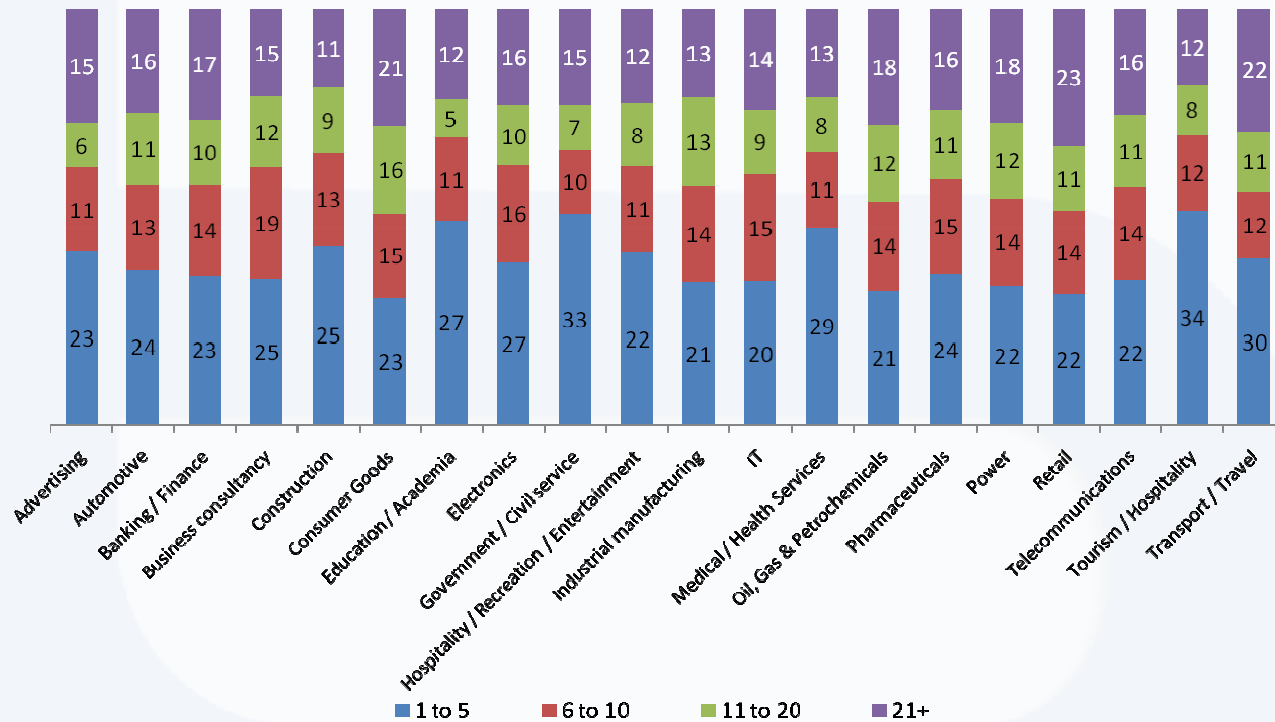
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Proportion of the total annual household income received in bonus, commissions and other incentives

Q: What proportion of your total annual household income is received in bonus, commissions and other incentives?

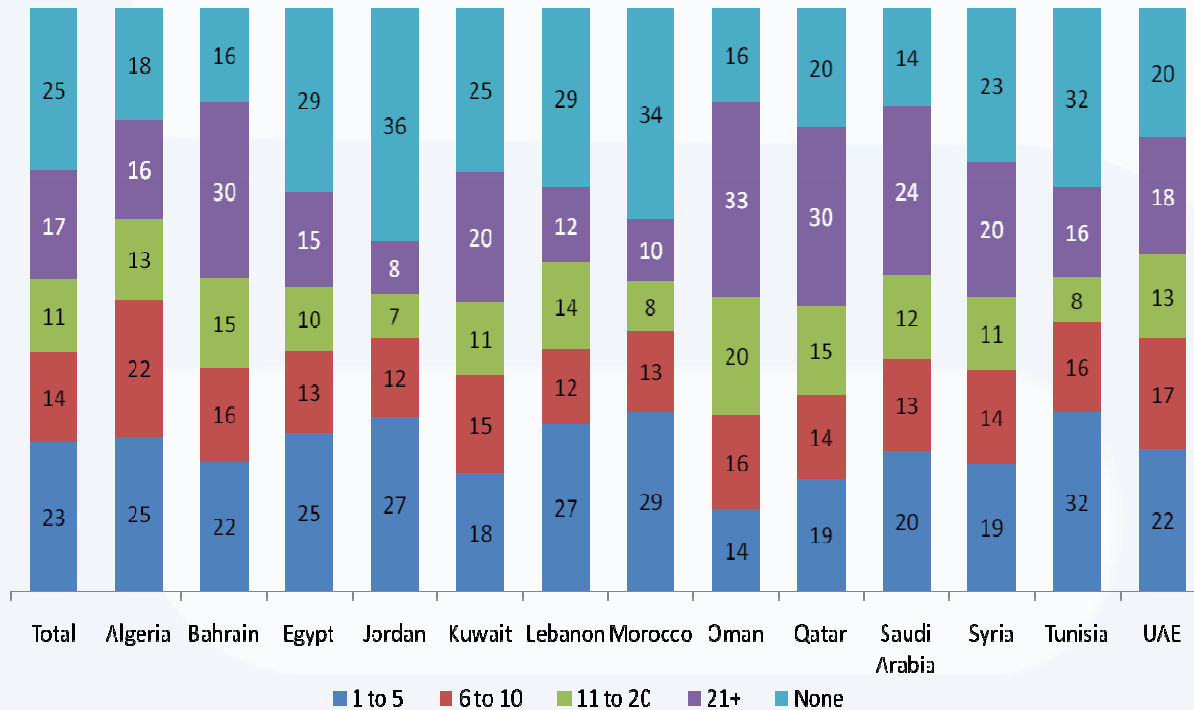


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Percentage of income saved

- Almost half of consumers save less than 5% of their income
- 17% of people do manage to save over 20% of their household income.

Q: What proportion of your household income is actually saved?



Base: Algeria (313), Bahrain (182), Egypt (2828), Jordan (1080), Kuwait (1004), Lebanon (385), Morocco (786), Oman (142), Qatar (630), KSA (3094), Syria (166), Tunisia (91), UAE (2895)

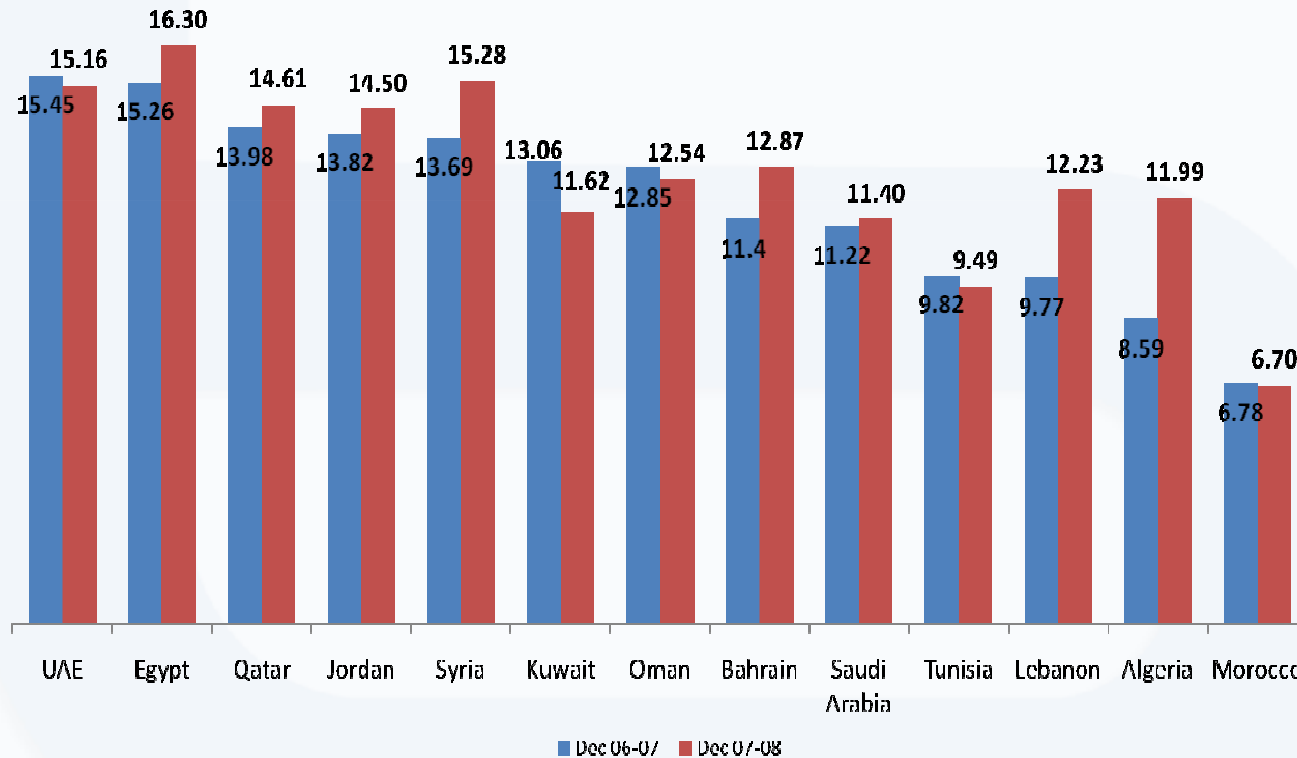
SALARY COMPARISONS AND EXPECTATIONS

Salary raise in past 12 months vs. past 24 months by country

- Egypt followed by Syria & UAE received the highest raise.
- Algeria & Lebanon however seen the most significant jump in raises since last year.

Q: Can you please select the total percentage raise you received in calendar year 2007 (December 2006 – December 2007)?

Q: Can you please select the total percentage raise you received in the past 12 months (December 2007 – December 2008)?



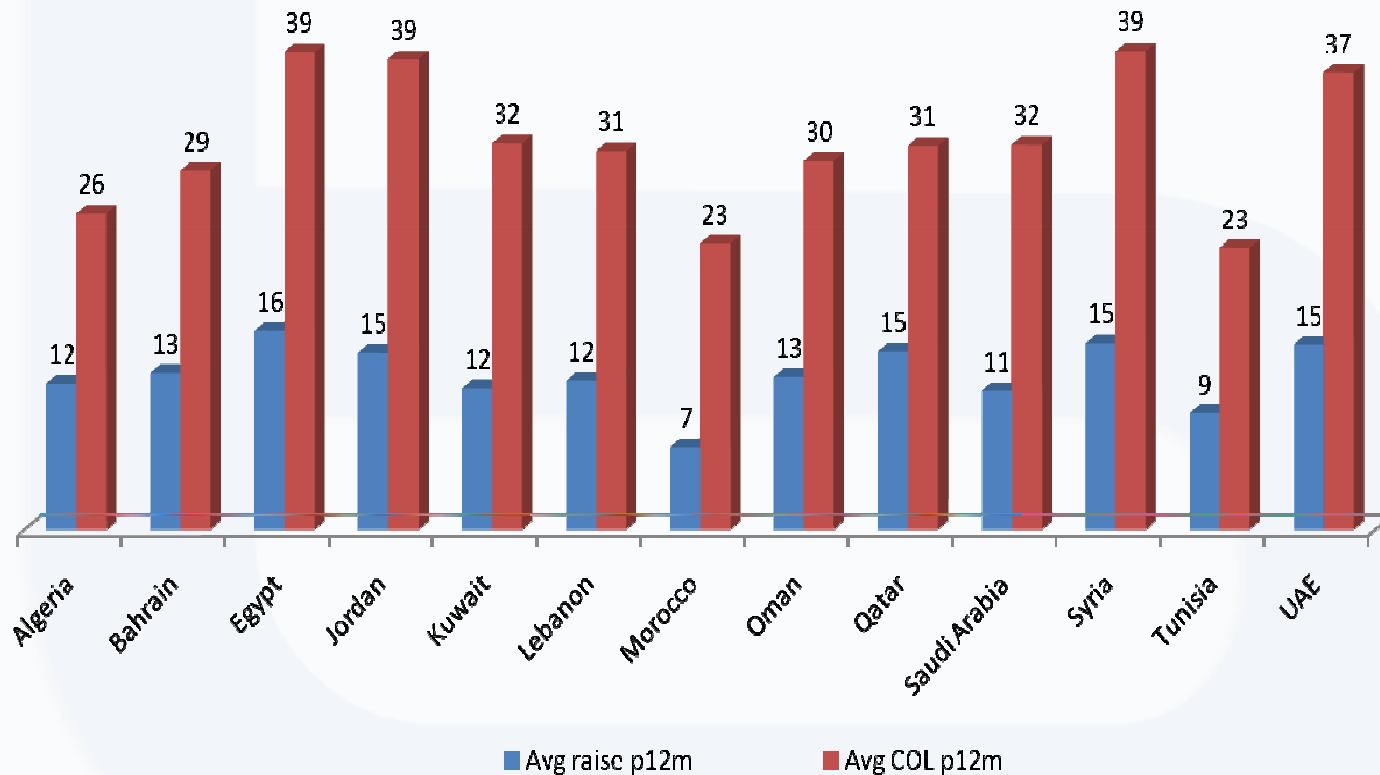
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Average salary raise in the past 12 months against COL raise in the past 12 months

- Clearly, salaries not rising in tandem with cost of living raises.

Q: Can you please select the total percentage raise you received in the past 12 months (December 2007 – December 2008)?

Q: On average by what percentage do you think your cost of living has increased in the last 12 months?

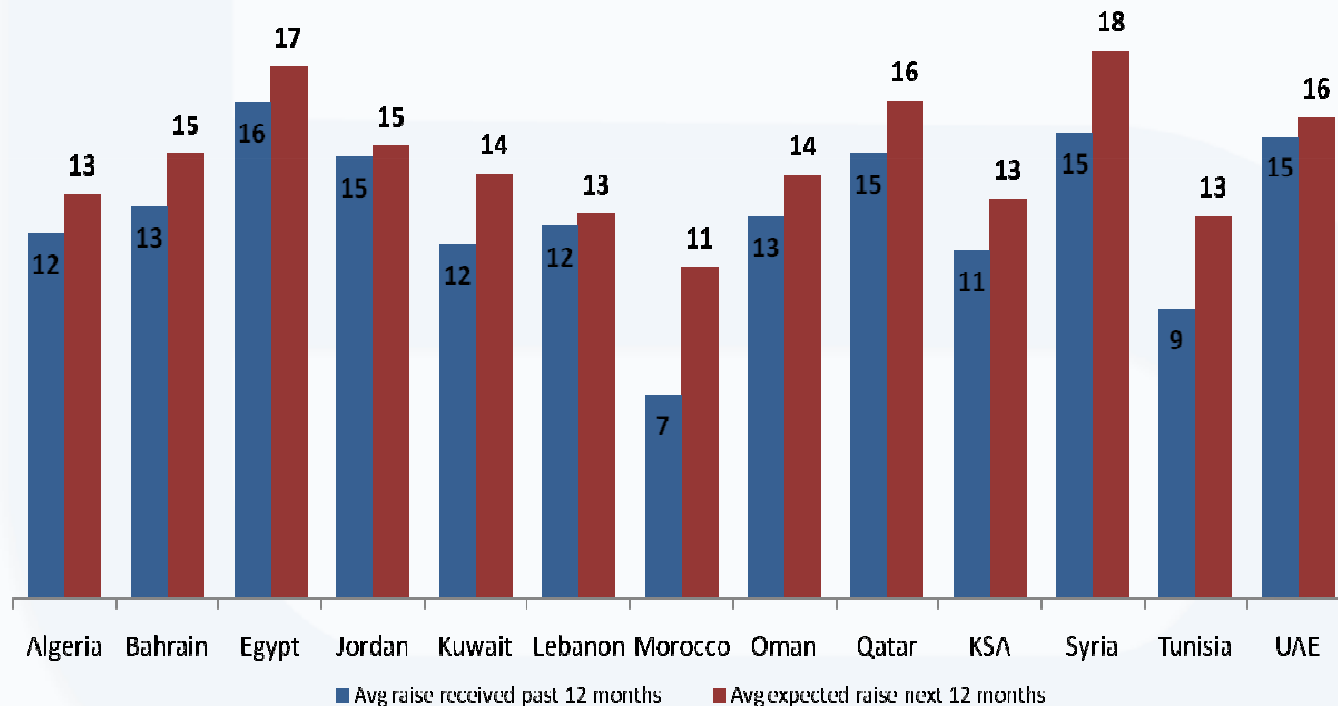


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Salary raise received in the past 12 months vs. expected in the next 12 months

- Future expectations are slightly higher than raise received in the past 12 months.

Q: Can you please select the total percentage raise you received in the past 12 months (December 2007 – December 2008)?
Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2008 – December 2009)?

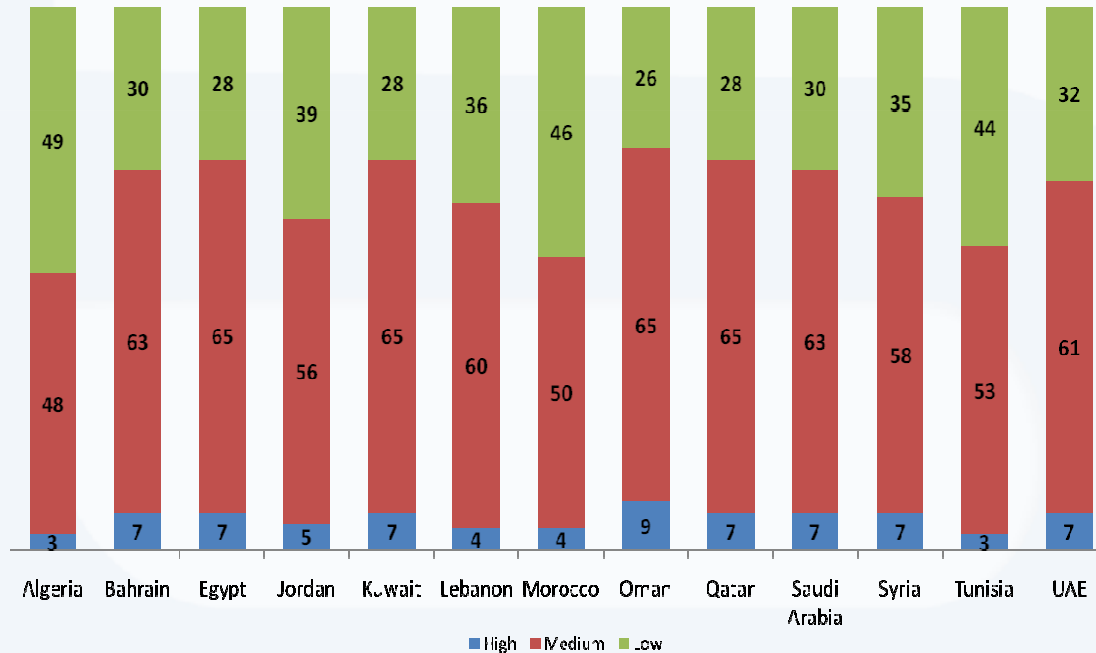


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Current salary satisfaction by country

- Satisfaction with compensation received is moderate to low. Oman the most content at 9% highly satisfied.
- Algeria, Morocco & Tunisia most discontent.

Q: Please indicate your level of satisfaction with your current salary.

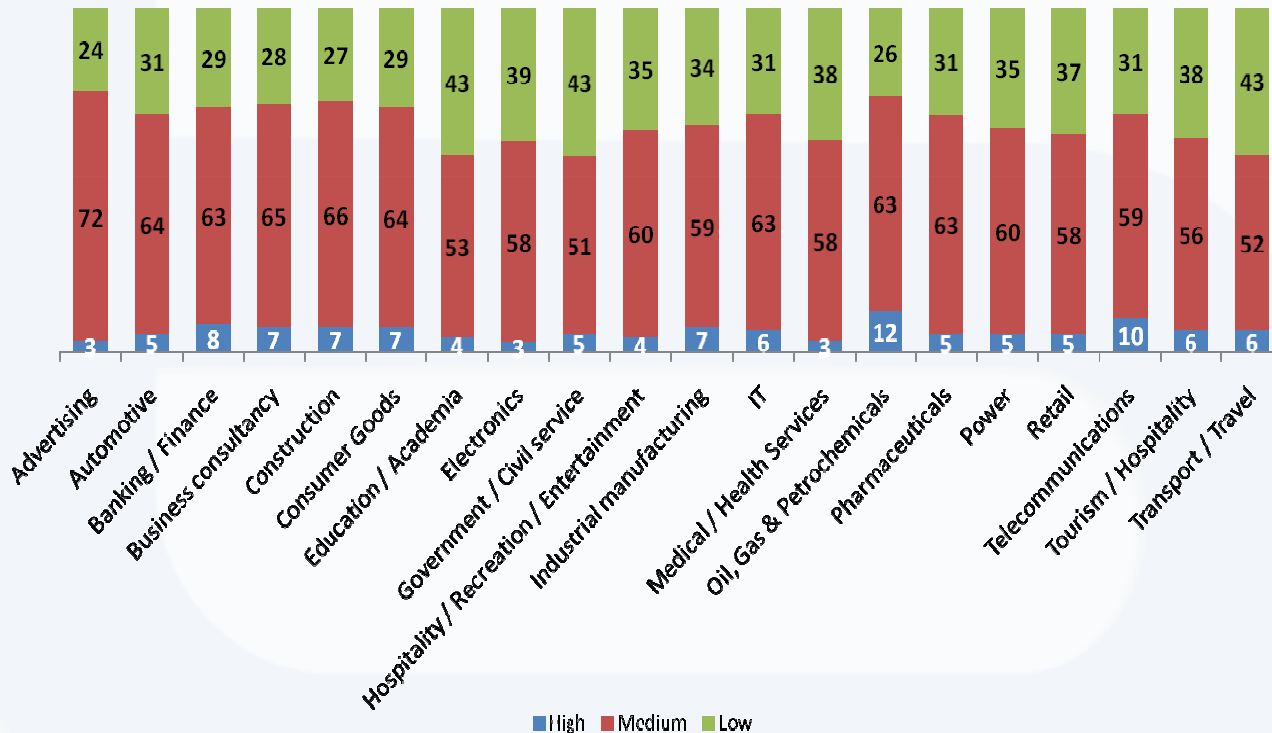


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Current salary satisfaction by industry

- Oil, Gas & Petrochem followed by Telecommunications seem to be far more satisfied with earnings than those in other industries. In general however, percentages of those highly satisfied were rather low.
- Academia and other education staff as well as those in transport / travel and public service were the most discontent.

Q: Please indicate your level of satisfaction with your current salary.

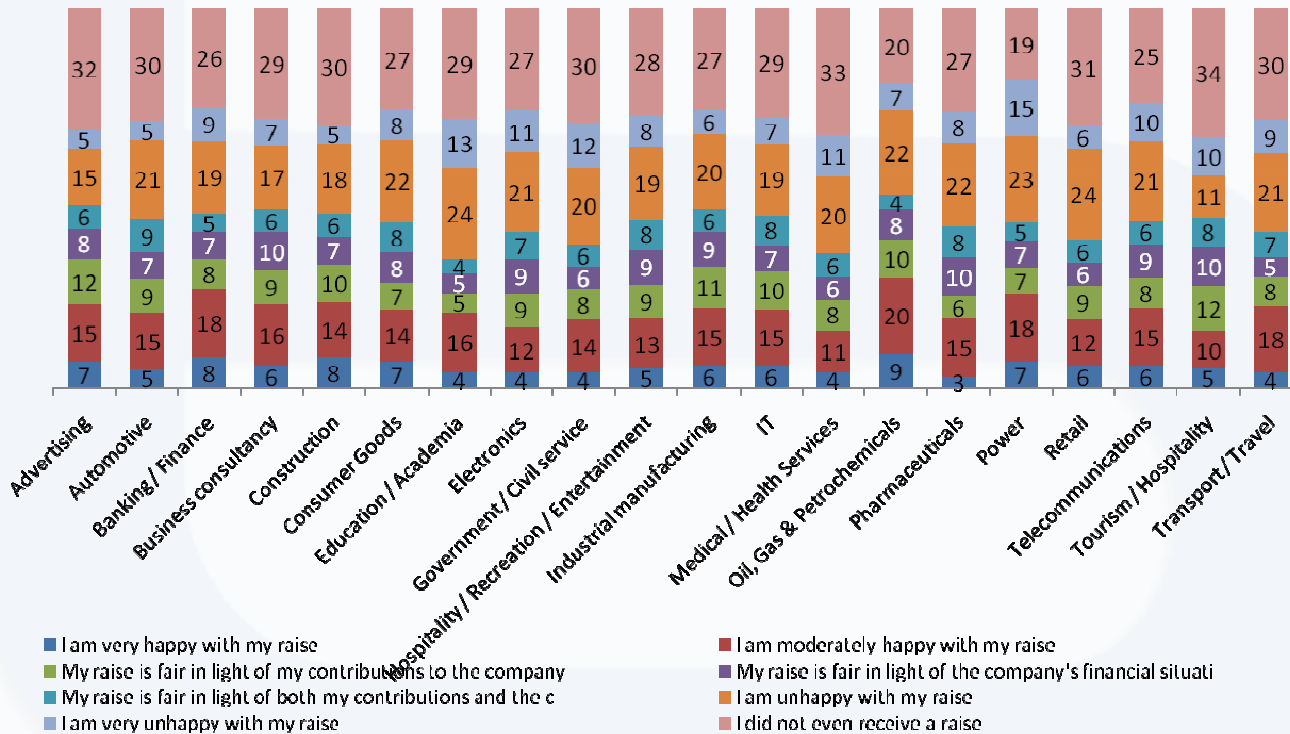


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Satisfaction with current salary raise

- Overall, 32% did not receive a raise in 2008.
- This fact coupled with perceived inflation in 2009 and the economic depression do not board well.

Q: Please indicate how satisfied you are with the salary raise you have received this year?

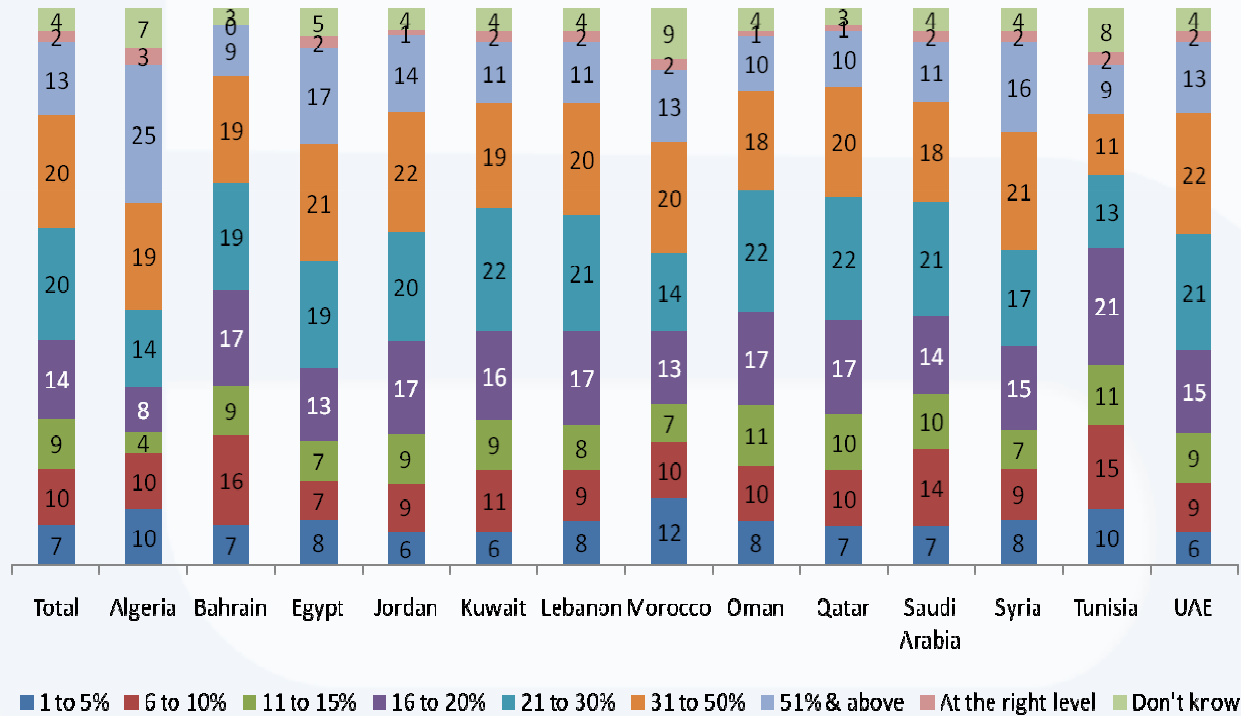


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Percentage of raise one DESERVES

• Comparatively, a higher proportion in Algeria and Egypt feel they deserve more than a 50% raise.

Q: Being as realistic as possible, can you please select the total percentage raise you think you currently deserve?

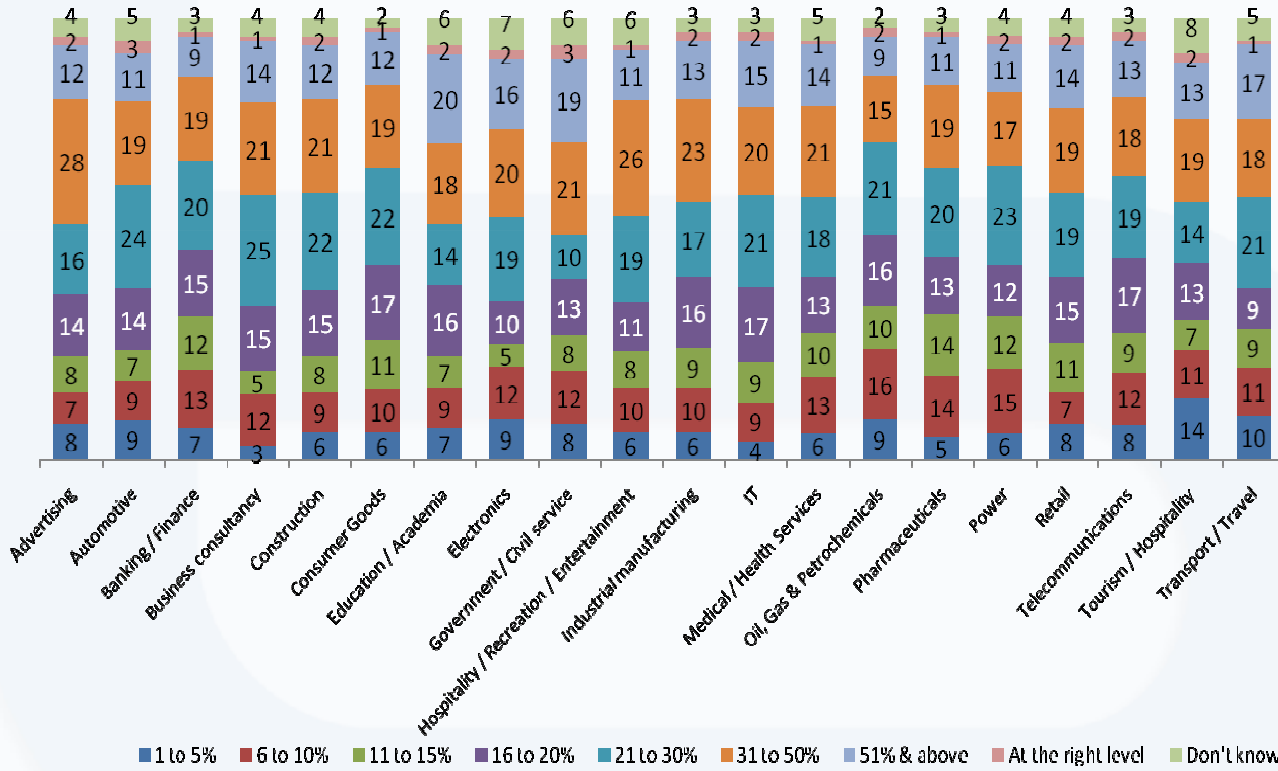


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Percentage of raise one DESERVES

- Education and Academia not only low paid, but also 20% who believe they deserve more than a 50% raise.

Q: Being as realistic as possible, can you please select the total percentage raise you think you currently deserve?

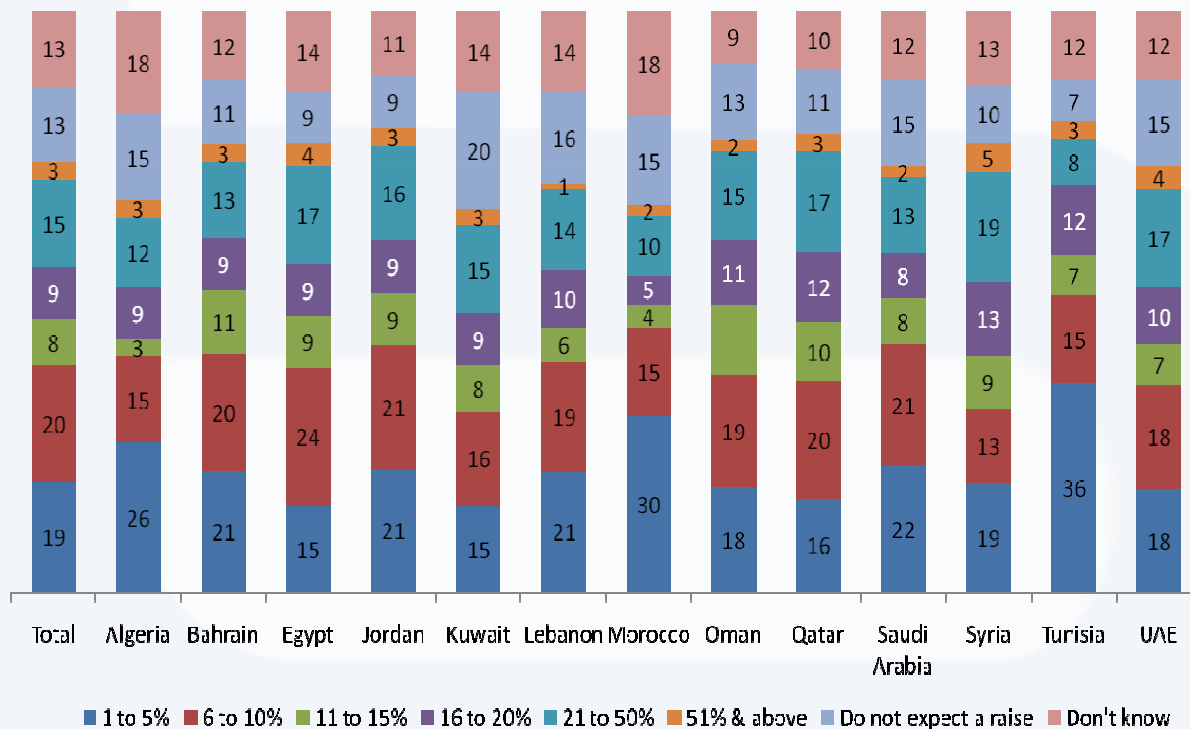


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Percentage of raise EXPECTED in the next 12 months

- Overall, just over a quarter are either unsure of receiving a raise in the next 12 months or do not expect one.
- Those expecting a raise largely don't think it would be more than 10%.

Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2008 – December 2009)?

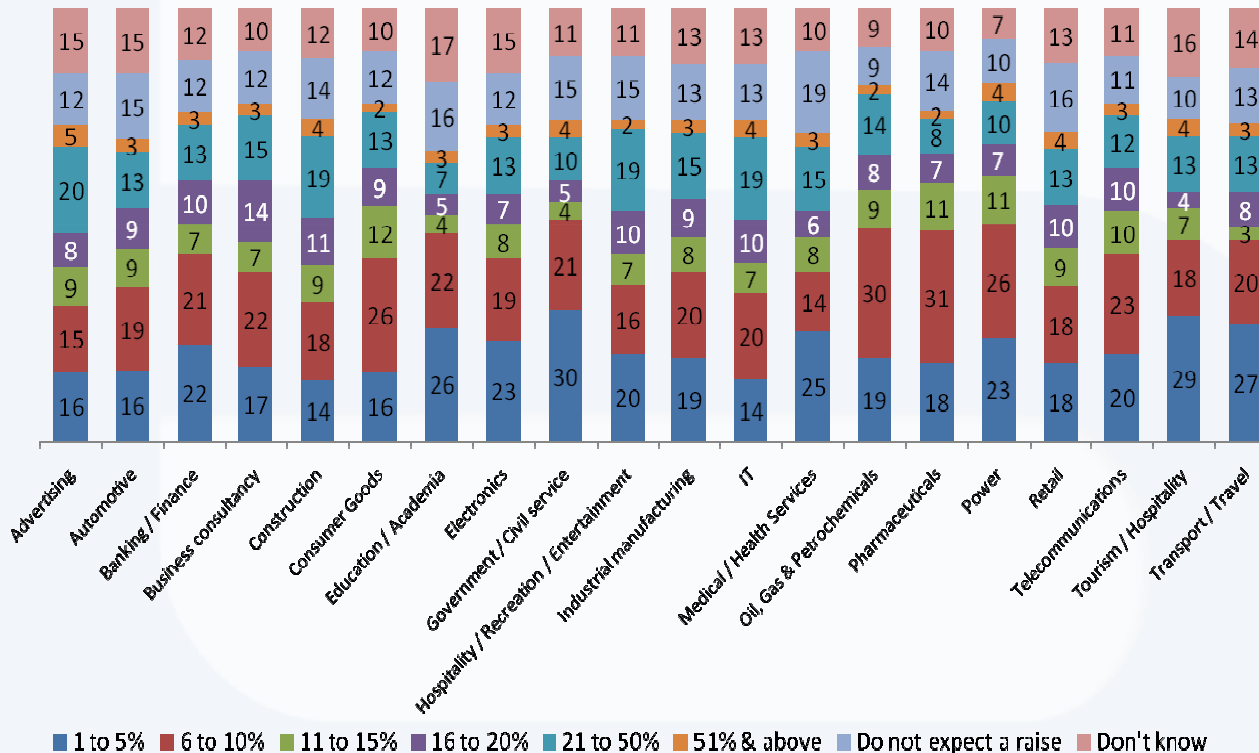


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Percentage of raise EXPECTED in the next 12 months

• Although Education / Academia largely feel they deserve more than 50% raise, the majority of them are expecting only up to 10% raise.

Q: Can you please select the total percentage raise you expect to receive in the next 12 months (December 2008 – December 2009)?

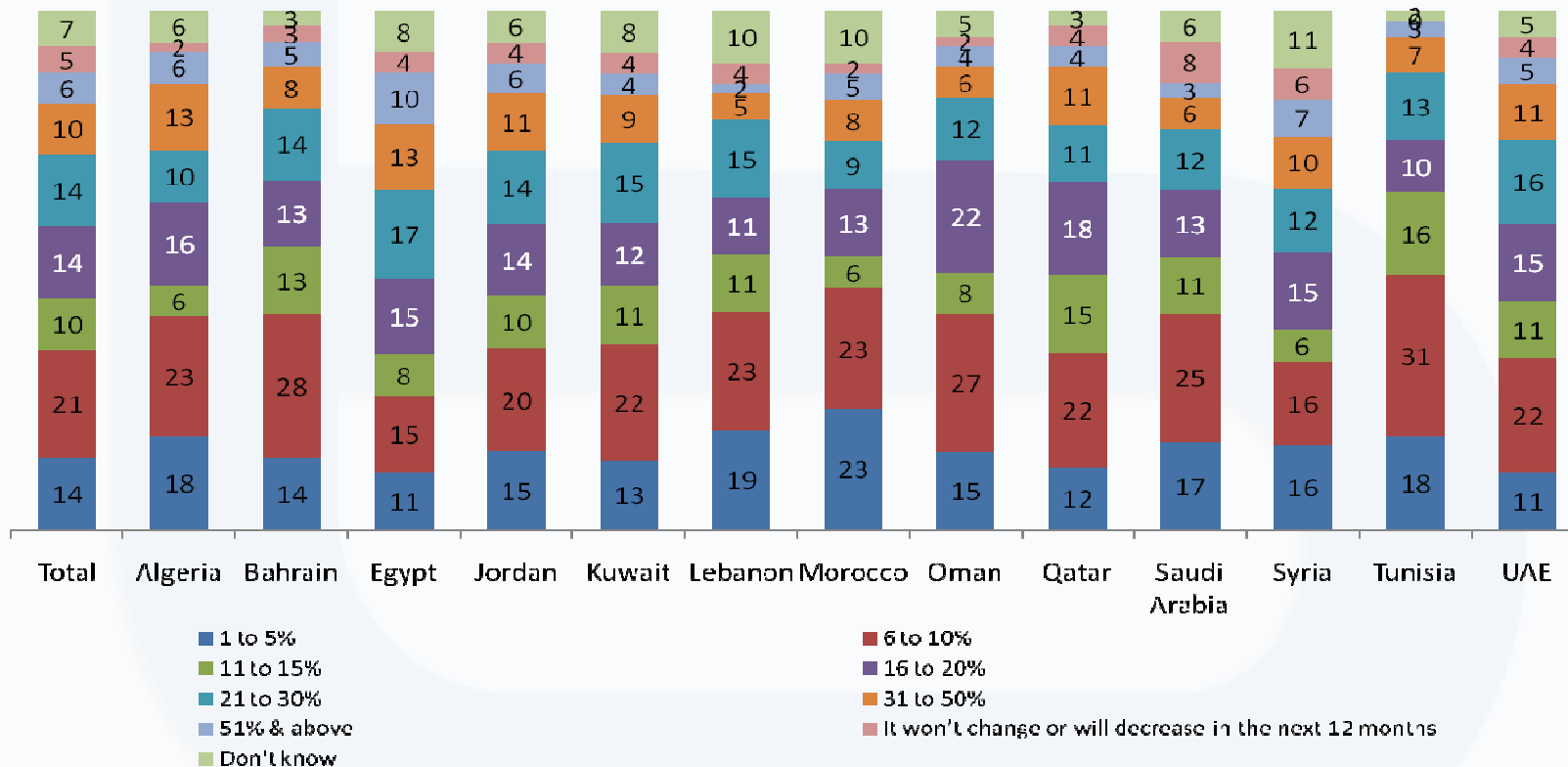


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EXPECTED Percentage of increase in the COST OF LIVING

- Overall, majority seem to think the cost of living will go up by upto 10%.

Q: On average by what percentage do you think your cost of living will increase in the next 12 months (December 2008 – December 2009)?

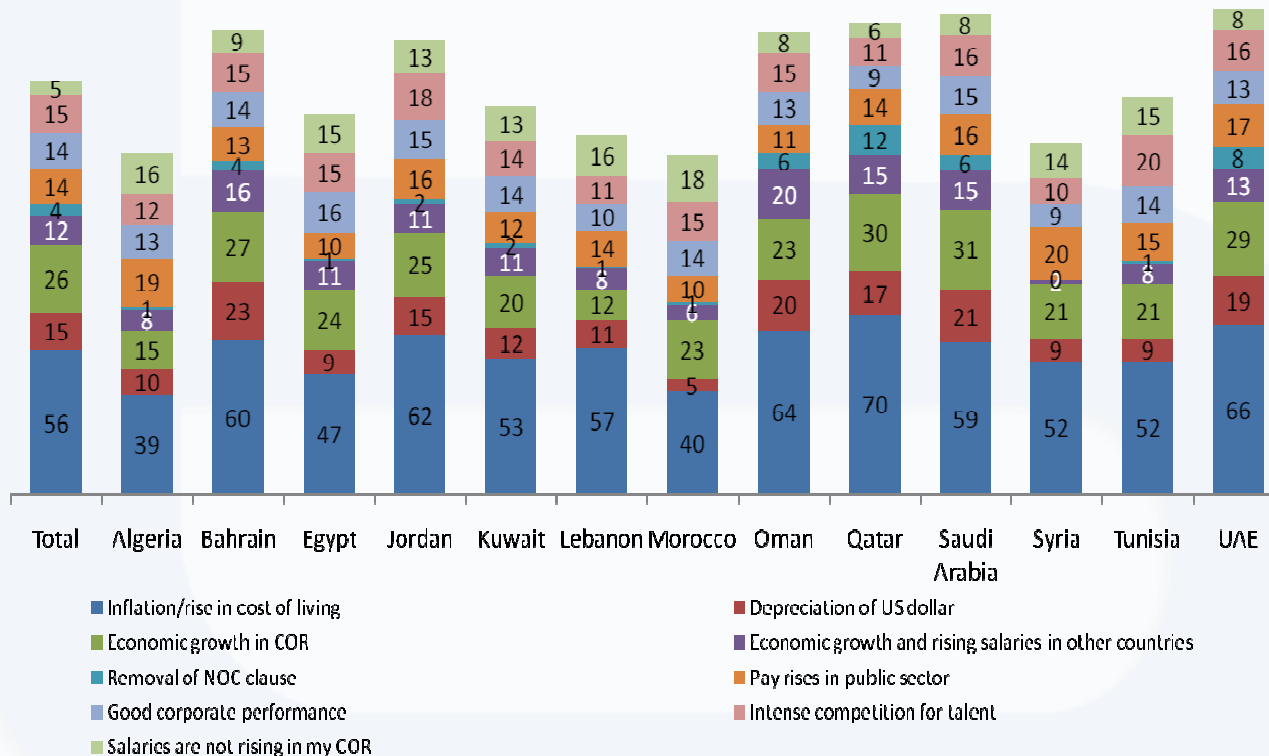


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Factors causing salaries to increase in COR

• Overall half say inflation / rise in the cost of living is causing salary increases. Economic growth is cited by a quarter.

Q: Which of these factors do you think are causing salaries to increase in your country of residence?

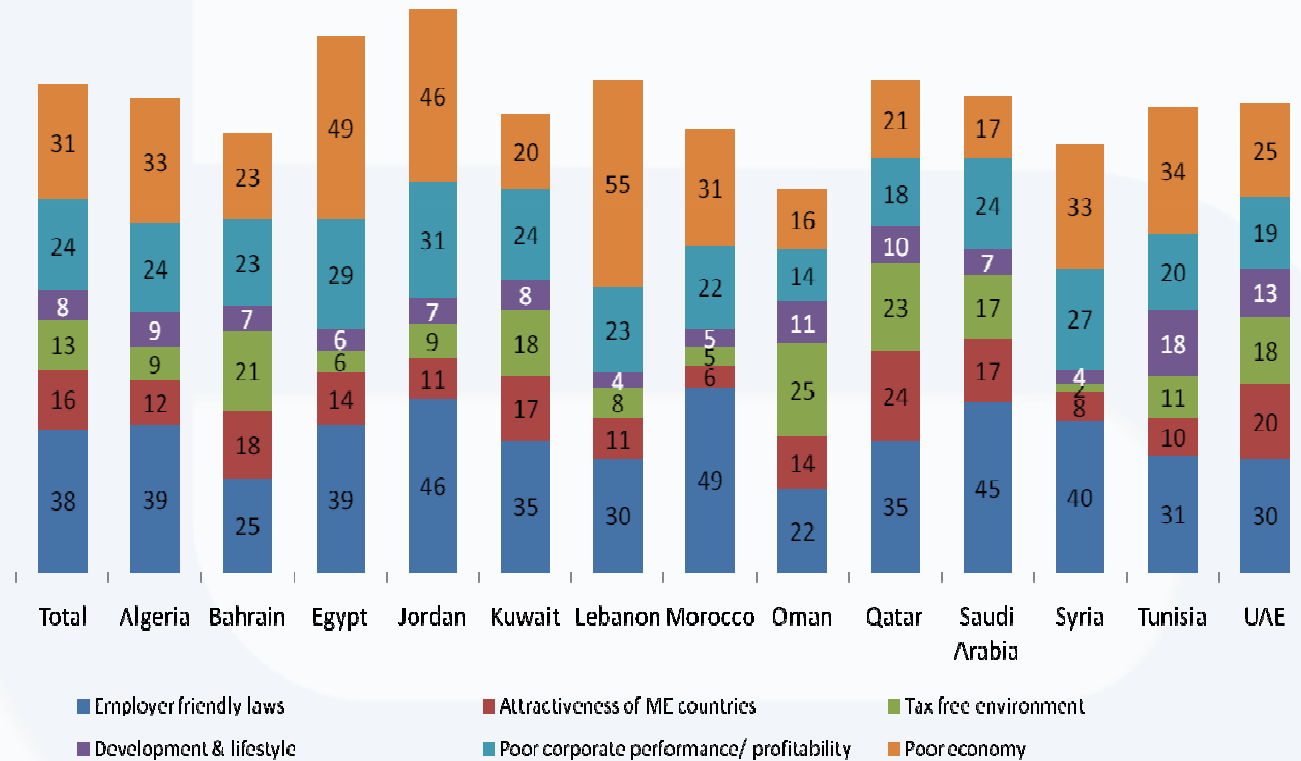


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Reasons for salaries not increasing

- Employer friendly laws followed by poor economic conditions are cited as the primary reasons for salaries not increasing.

Q: Which of these factors do you think are causing salaries to not increase sufficiently in your country?

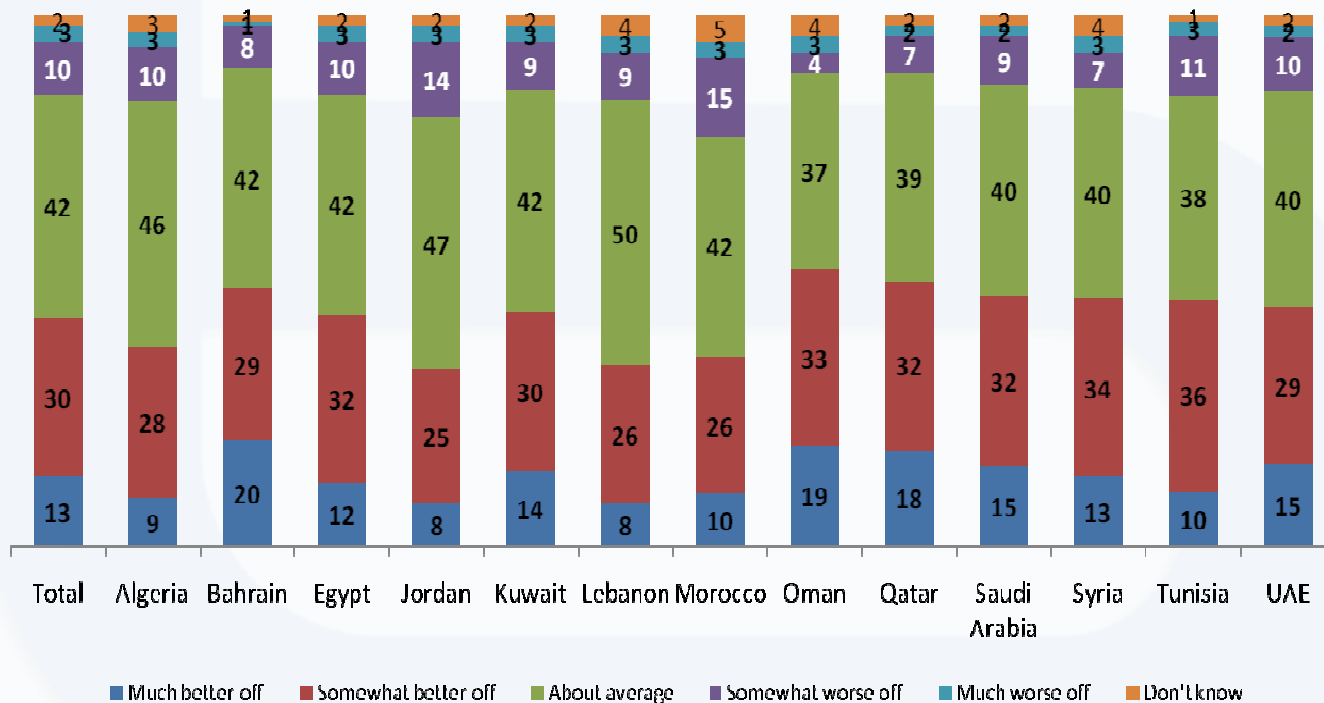


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Are you better or worse off?

- In general, the bulk of the population think they are about the same as their counterparts back home.
- However, amongst those feeling one way or the other, percentage of those 'better' off higher than those 'worse' off.

Q: Thinking about your quality of life, how would you compare yourself to other people of a similar generation in your country of residence?

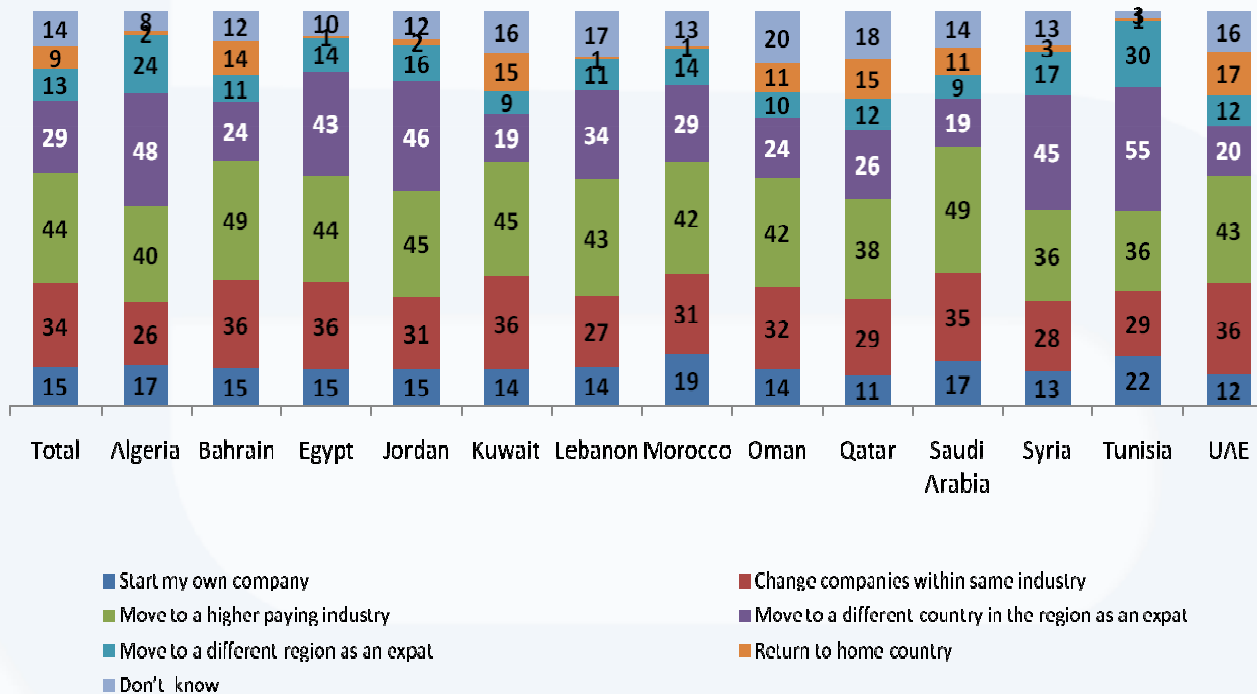


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Actions to improve quality of life

- Most people are either likely to move to a higher paying industry, change companies in the same industry or move country within the region to maintain their quality of life.
- The UAE has the largest percentage of those willing to relocate to their home country in search of better opportunities (17%).

Q: Will quality of life considerations induce you to do any of the following in the next 12 months?

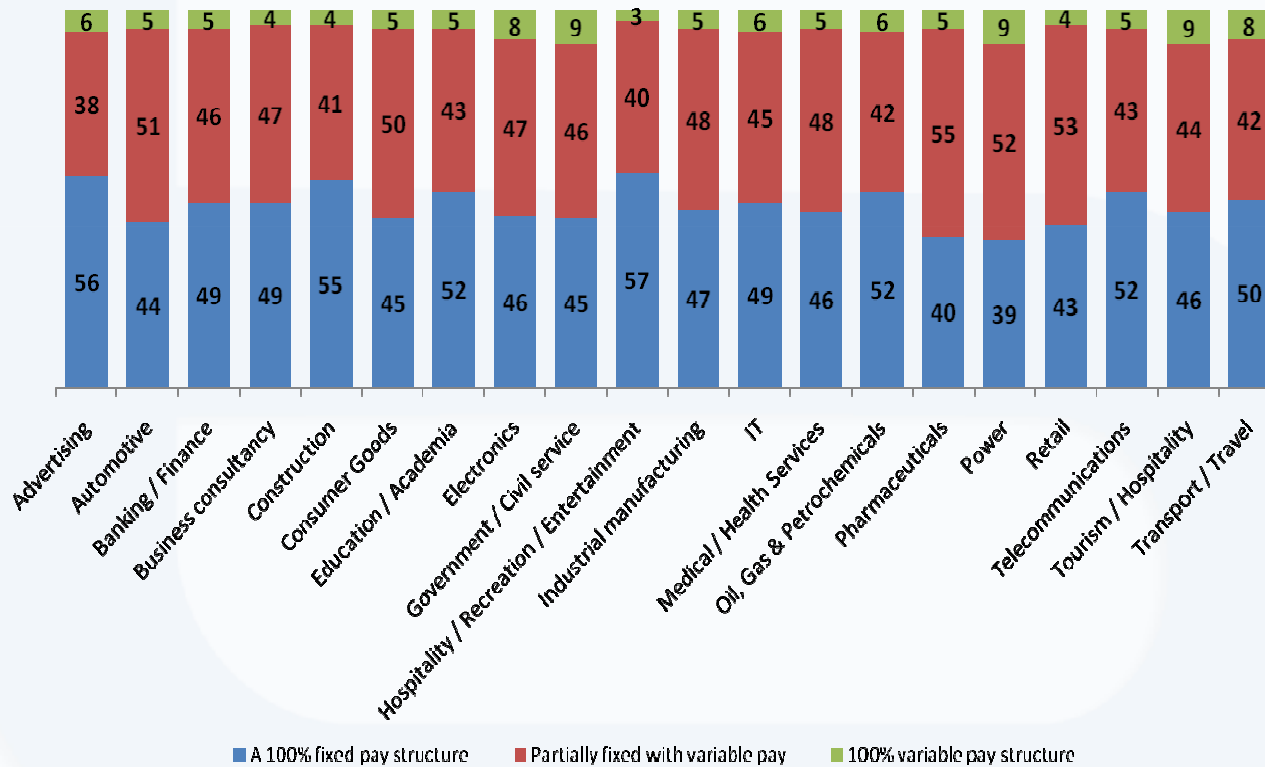


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Best pay structure

- Naturally, almost half the industries prefer a fixed pay structure as opposed to a partially fixed with variable pay.
- Very few would opt for a 100% variable structure.

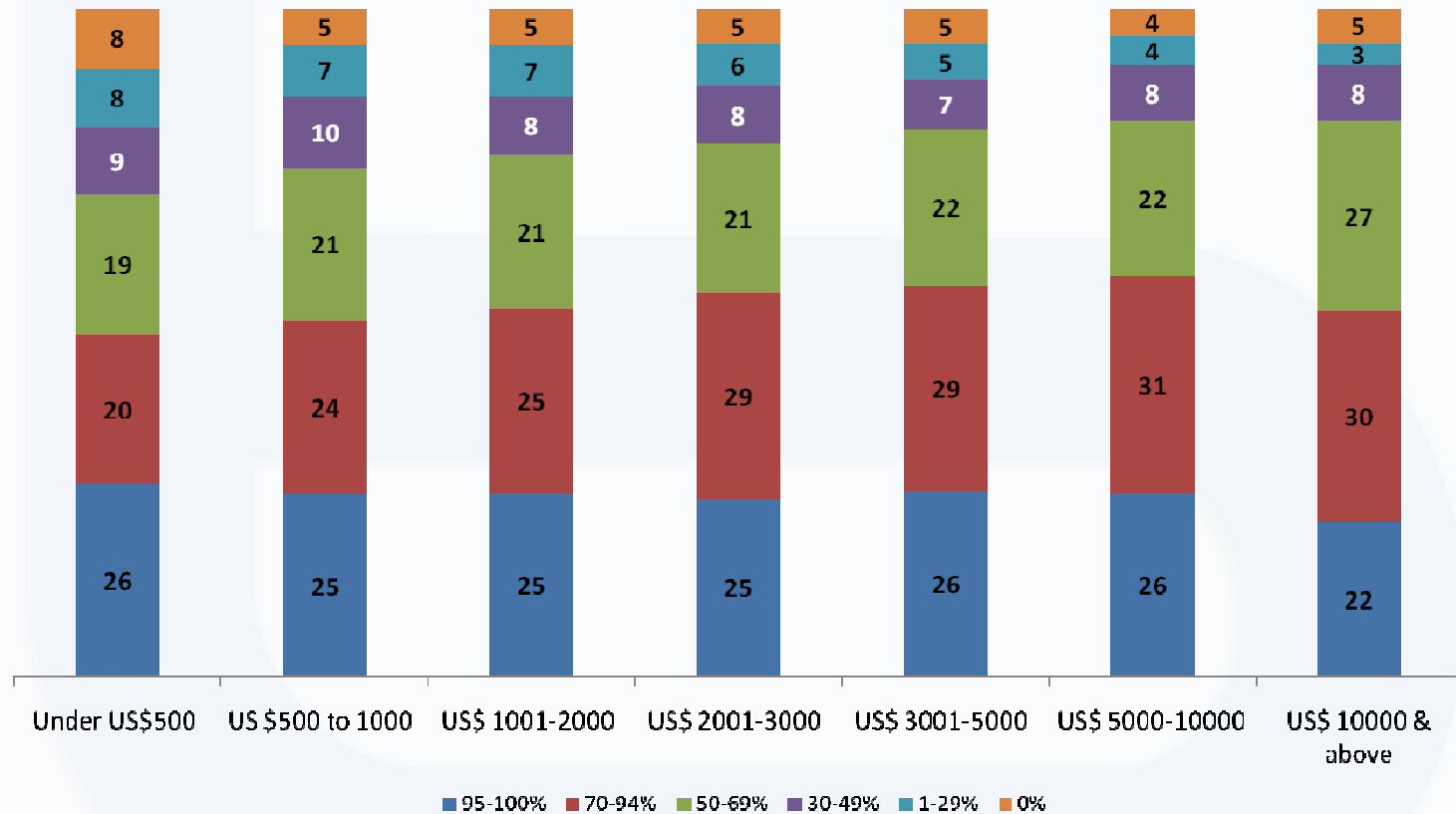
Q: Which of the following do you think is a better pay structure for you?



Base: Advertising (259), Automotive (273), Banking/Finance (1011), Business Consultancy (374), Construction (1807), Consumer Goods (553), Education/Academia (350), Electronics (312), Government/ Civil Service (224), Hospitality / Recreation / Entertainment (212), Industrial manufacturing (656) IT (1311), Medical / Health Services (343), Oil, Gas & Petrochemicals (619), Pharmaceuticals (258), Power (248), Retail (398), Telecommunications (855), Tourism/Hospitality (279), Transport / Travel (197)

Loyalty vs. Salary

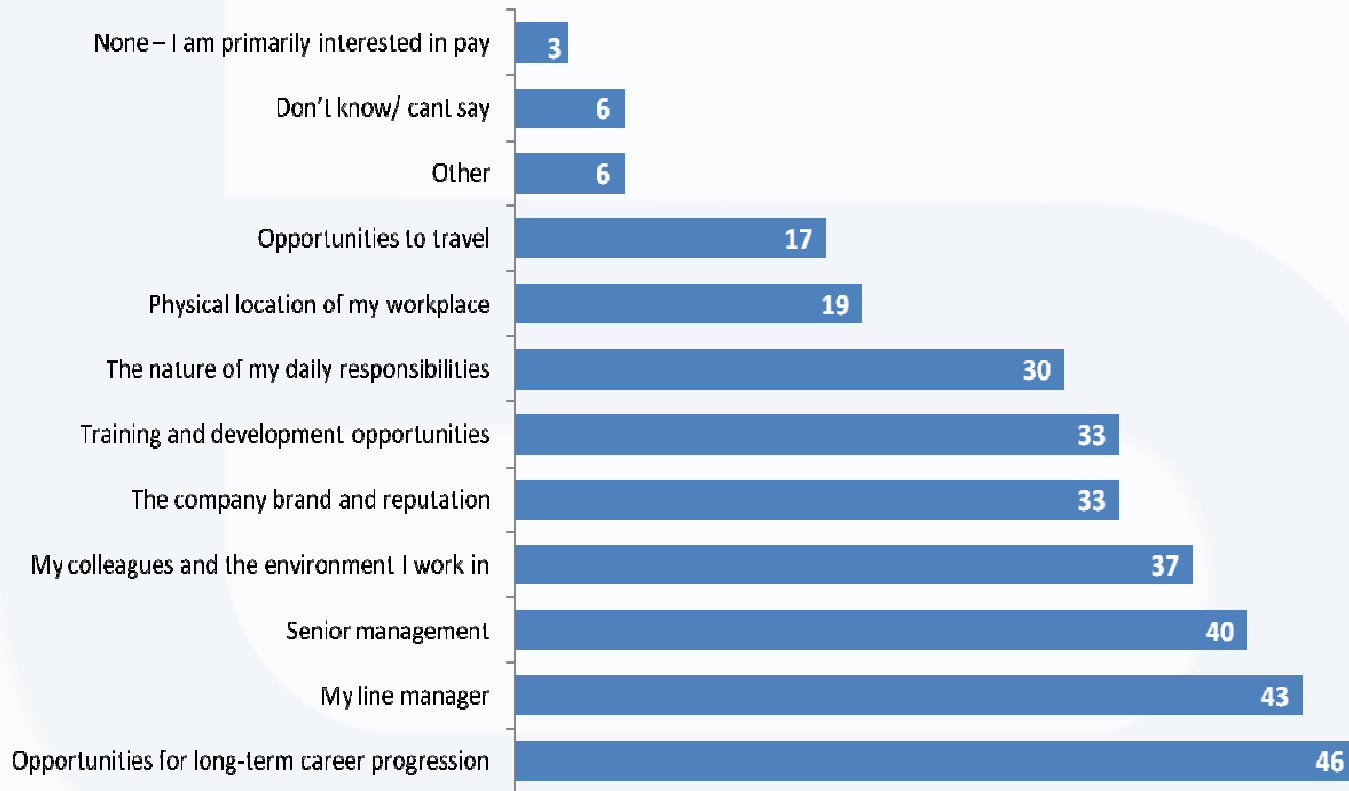
Q: To what extent is your loyalty to your company directly linked to the salary you receive?



Factors driving loyalty other than pay

- Career opportunities, management / colleagues and environment are top driving factors of loyalty other than pay.

Q: What other variables most strongly drive your loyalty to the company beside pay?



IMPACT OF CURRENT ECONOMIC SITUATION

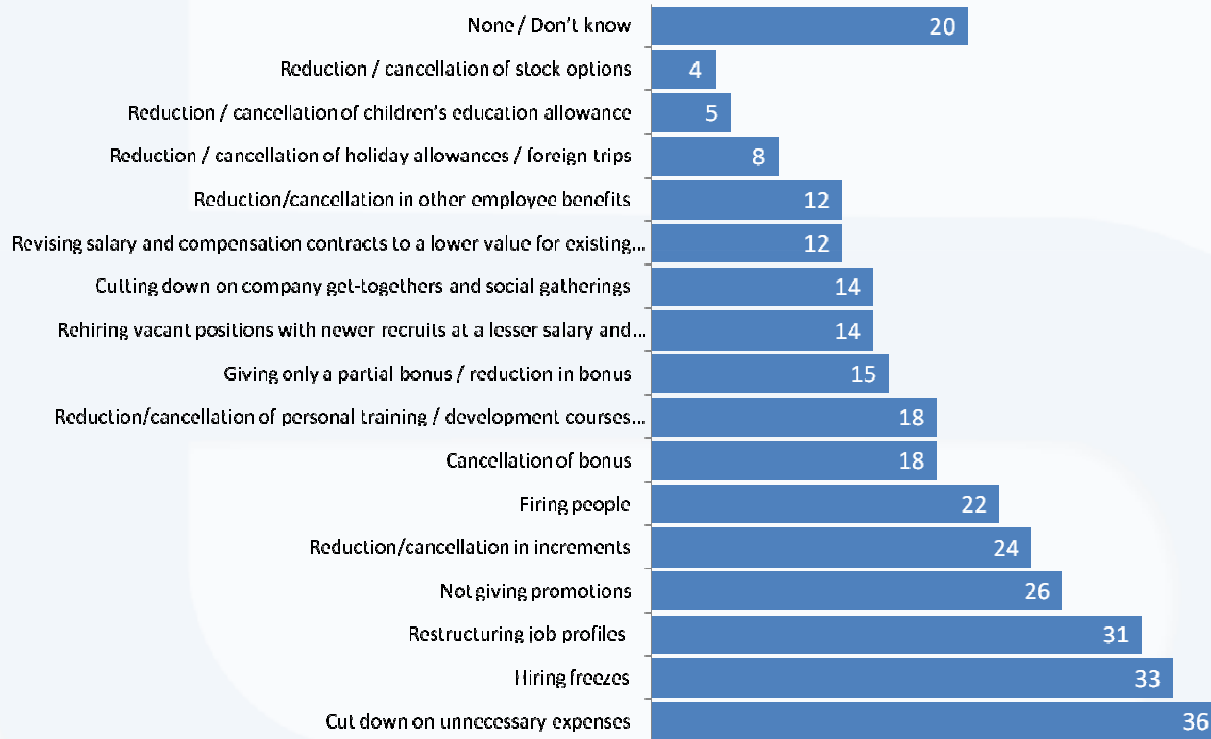
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Actions taken by the company in the economic current situation at a Total level

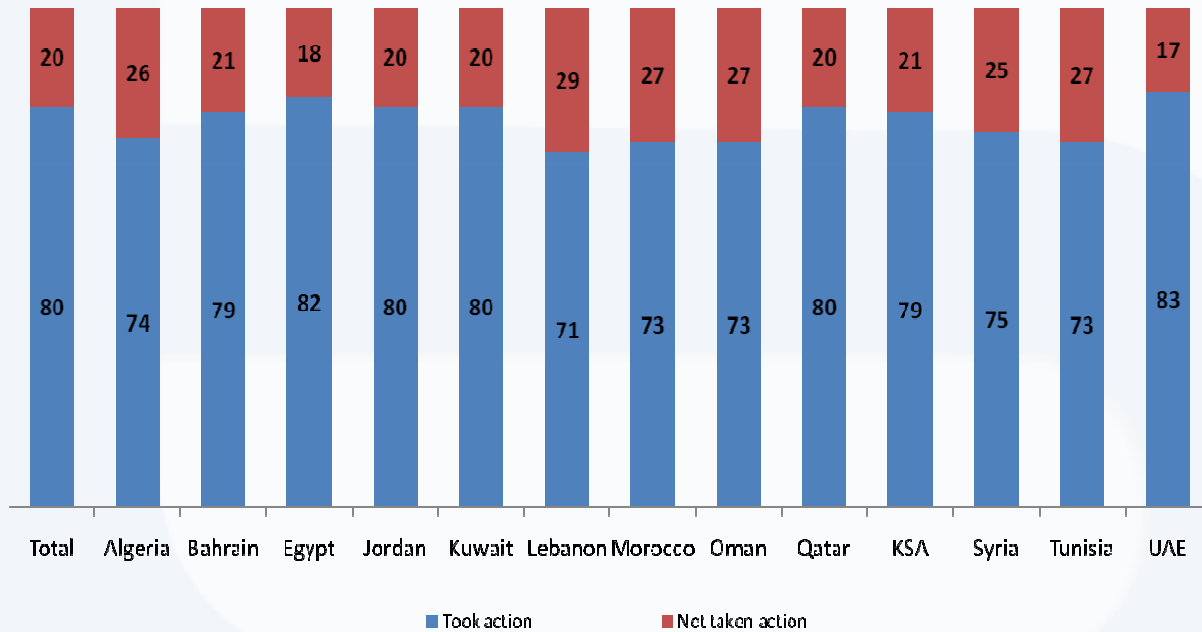
Q: In the current economic situation, would you say your company is taking any of the following actions?



Actions taken by the company in the economic current situation

- UAE seems to be the most highly affected and as an outcome taking more steps to counter the current economic situation.

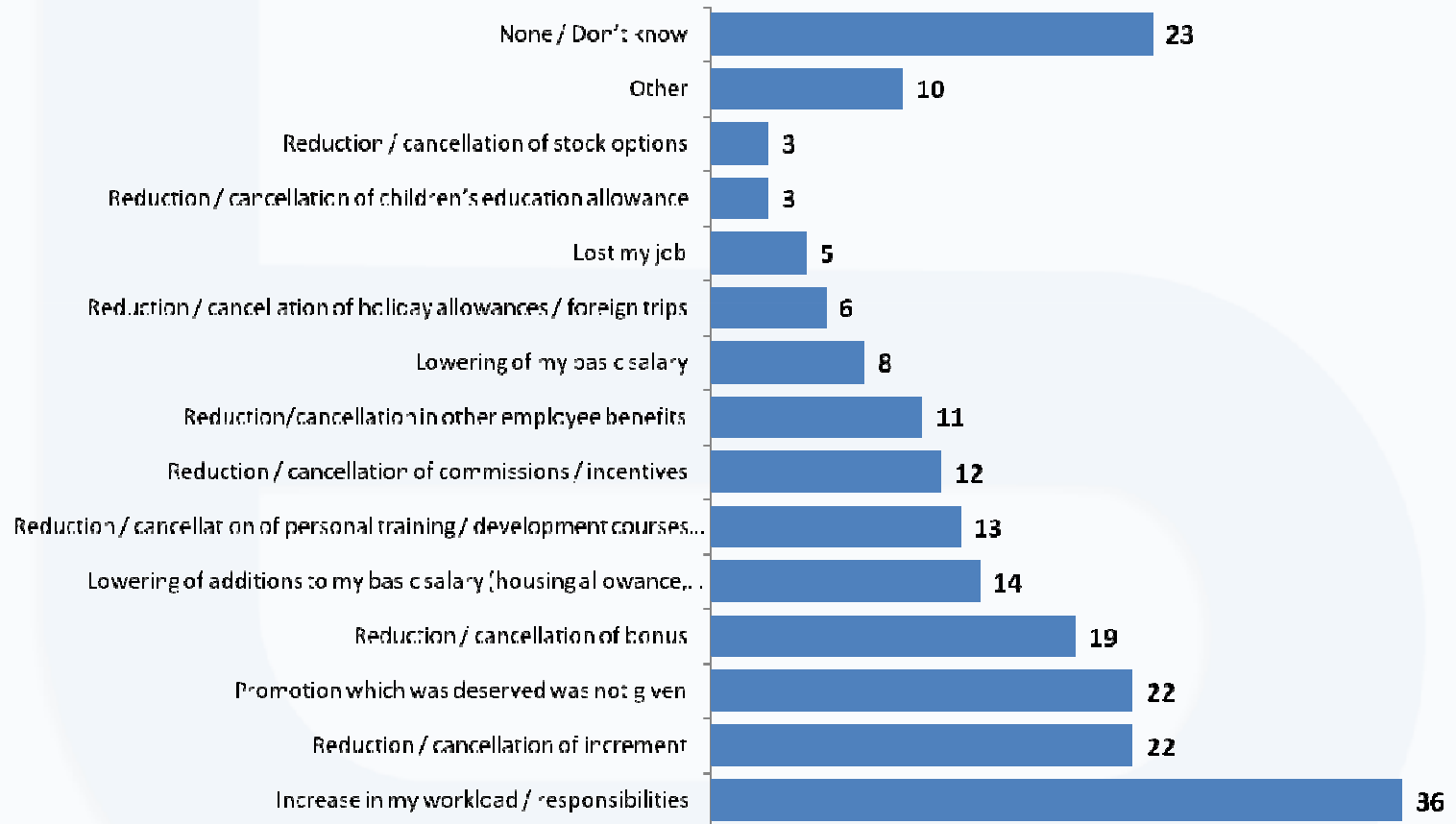
Q: In the current economic situation, would you say your company is taking any of the following actions?



Base: Algeria (313), Bahrain (182), Egypt (2828), Jordan (1080), Kuwait (1004), Lebanon (385), Morocco (786), Oman (142), Qatar (630), KSA (3094), Syria (166), Tunisia (91), UAE (2895)

Personal effect of the current economic situation

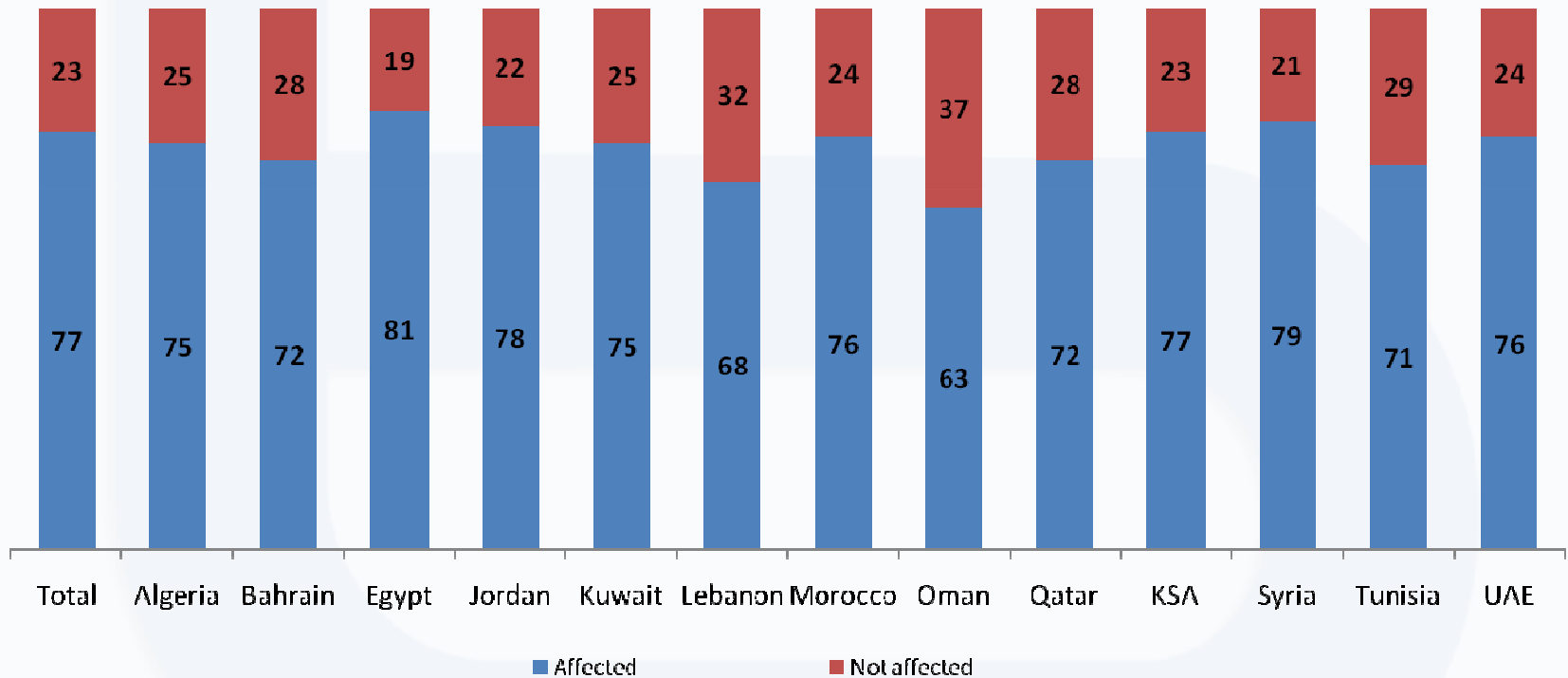
Q: Please tell us if any of the following has affected you personally due to the current economic situation.



Personal effect of the current economic situation

- Egypt is reporting the highest personal impact of economic recession.

Q: Please tell us if any of the following has affected you personally due to the current economic situation.

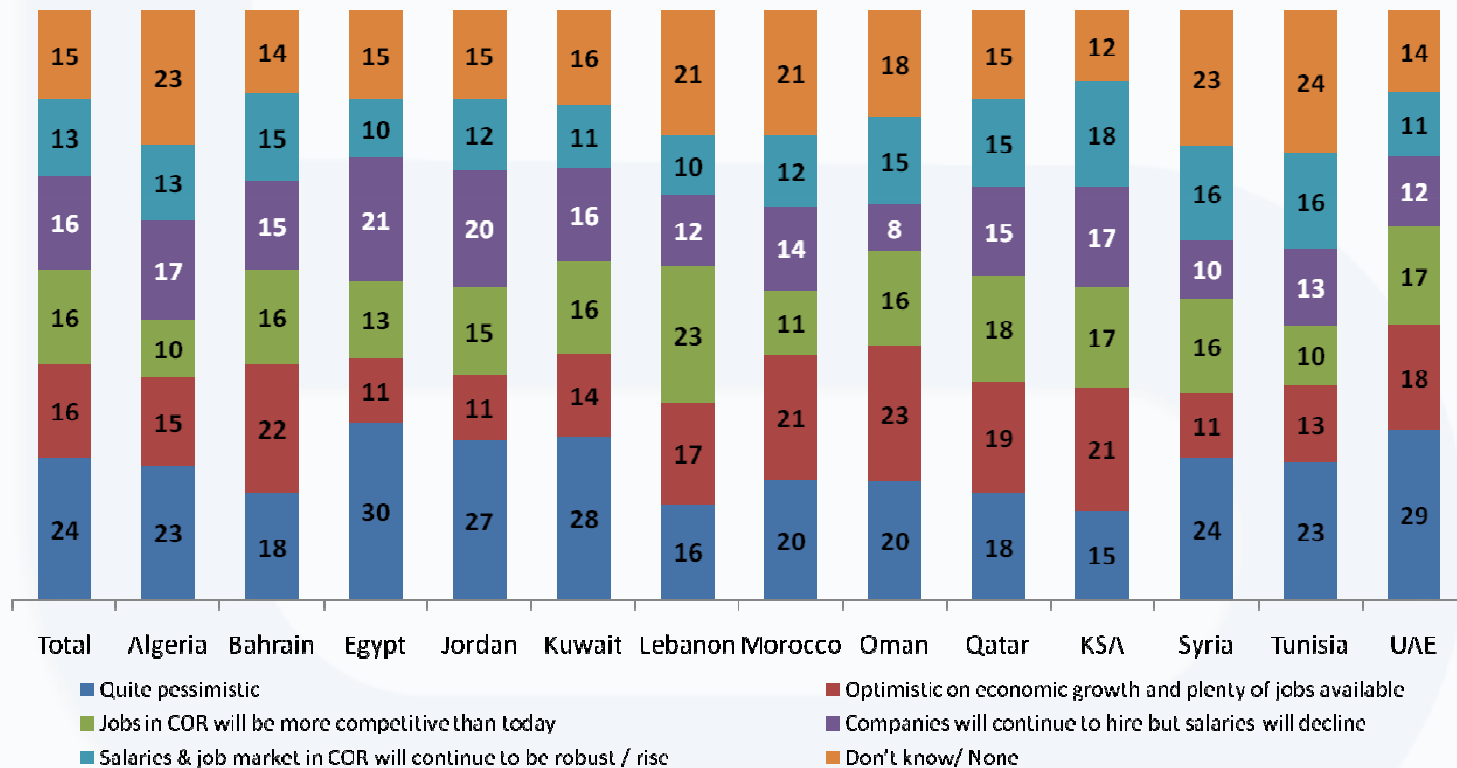


Base: Algeria (313), Bahrain (182), Egypt (2828), Jordan (1080), Kuwait (1004), Lebanon (385), Morocco (786), Oman (142), Qatar (630), KSA (3094), Syria (166), Tunisia (91), UAE (2895)

Feelings towards the current climate in the job market

- Only 29% of the population positive about the current job climate (Note: addition of salaries & job market continue to rise & optimistic on economic growth and jobs available).

Q: Which of the following best sums up your feelings towards the current climate in the job market?

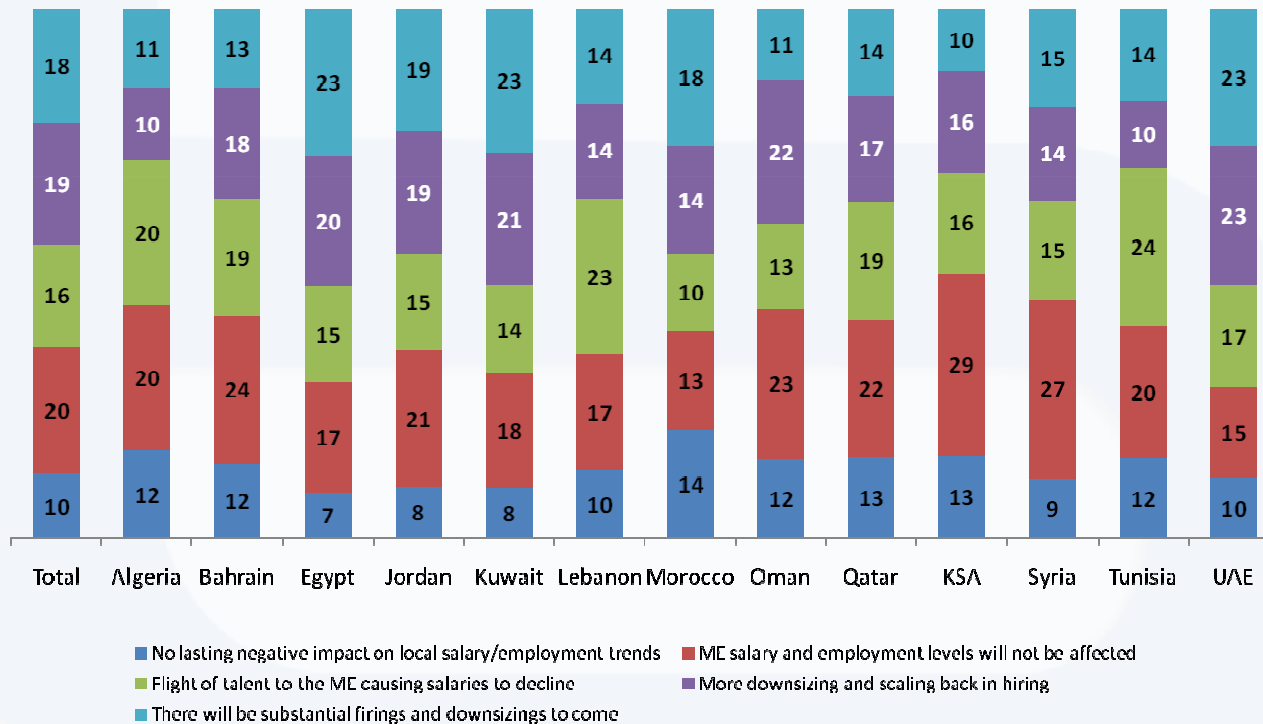


Base: Algeria (313), Bahrain (182), Egypt (2828), Jordan (1080), Kuwait (1004), Lebanon (385), Morocco (786), Oman (142), Qatar (630), KSA (3094), Syria (166), Tunisia (91), UAE (2895)

Perceived impact of global salary and unemployment trends

• KSA the most positive with 29% feeling that ME salary and employment levels will not suffer.

Q: How do you feel global salary and unemployment trends will affect your country of residence?

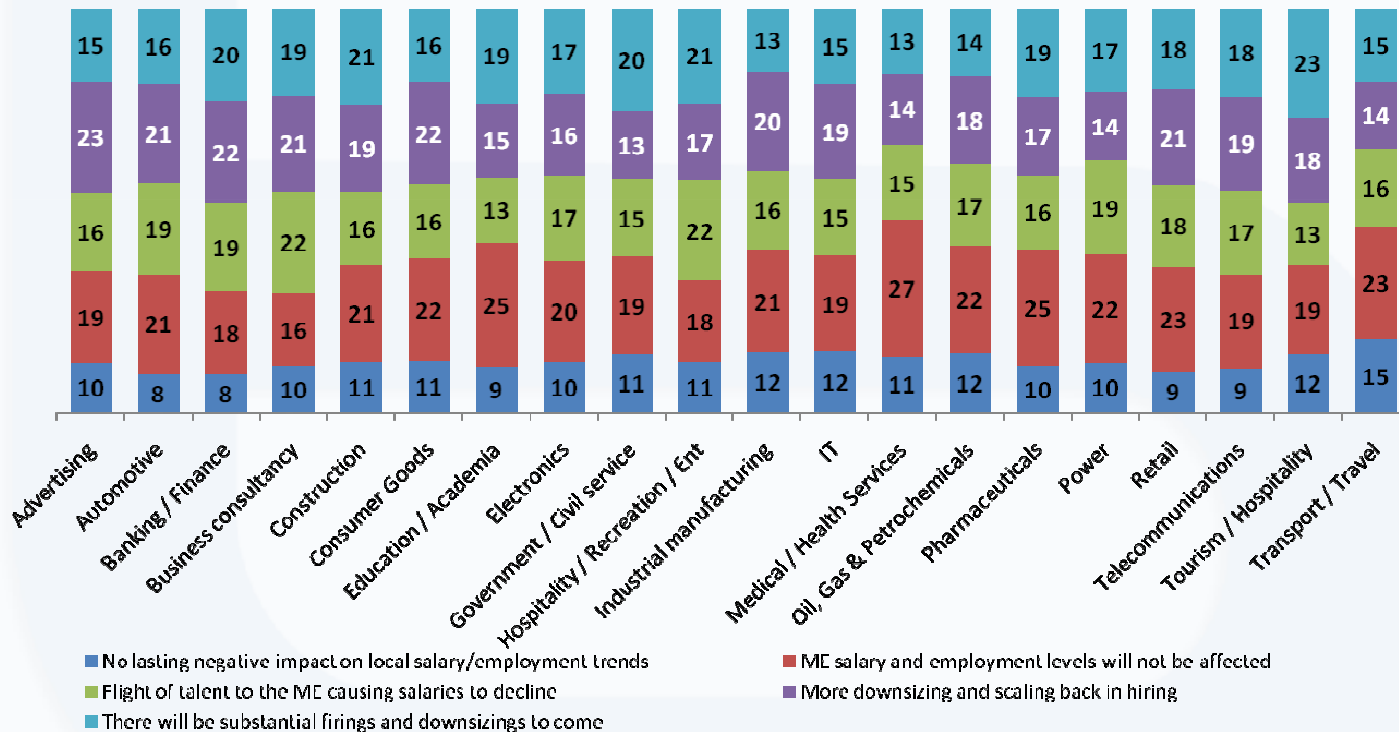


Base: Algeria (313), Bahrain (182), Egypt (2828), Jordan (1080), Kuwait (1004), Lebanon (385), Morocco (786), Oman (142), Qatar (630), KSA (3094), Syria (166), Tunisia (91), UAE (2895)

Perceived impact of global salary and unemployment trends

- 27% of those working in Medical / Health services feel that salary and employment levels in the UAE will not be affected.

Q: How do you feel global salary and unemployment trends will affect your country of residence?



Base: Advertising (259), Automotive (273), Banking/Finance (1011), Business Consultancy (374), Construction (1807), Consumer Goods (553), Education/Academia (350), Electronics (312), Government/ Civil Service (224), Hospitality / Recreation / Entertainment (212), Industrial manufacturing (656), IT (1311), Medical / Health Services (343), Oil, Gas & Petrochemicals (619), Pharmaceuticals (258), Power (248), Retail (398), Telecommunications (855), Tourism/Hospitality (279), Transport / Travel (197)

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