

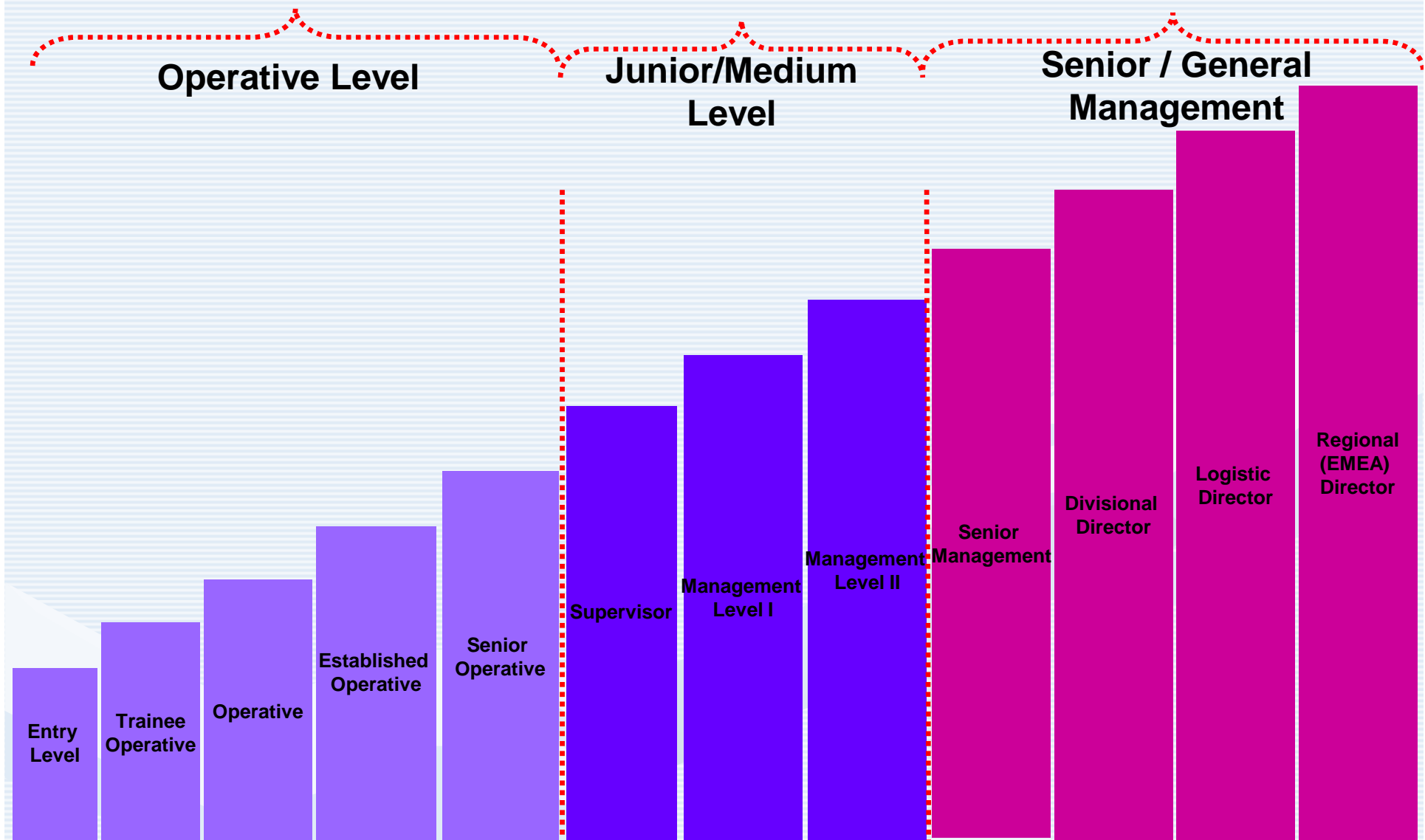
PRODUCTIVITY – EDUCATION - SUPPLY ROMANIA 2008

Laura Simion
PR & Communication Vice-president ARILOG
Bucharest, 04th of July 2008

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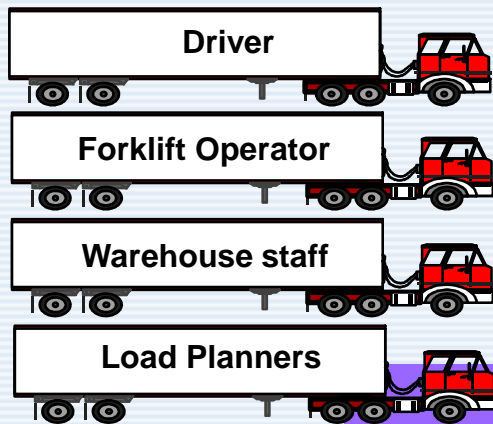
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Productivity

- Easy to measure
- Organized by shifts
- Due to low salaries wish to work overtime

Operative Level



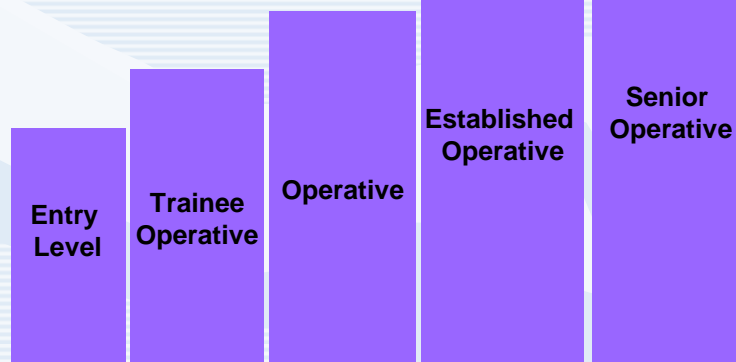
Education

- Lack of education
- Based on experience (not necessary a good one)
- The knowledge received informal
- Schools are fragmented and insufficient

Supply

- Difficult on e-job systems
- Mouth-to-mouth
- Recommendation
- Newspaper
- Follows the boss from another company

Big problem



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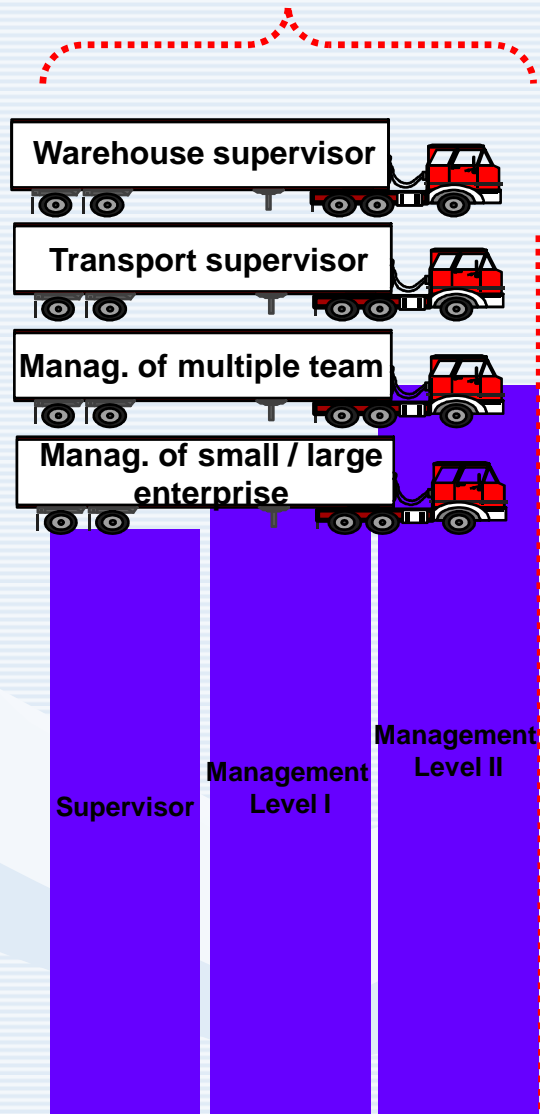
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Junior/Medium Level



Productivity

- Unusual to measure personal performance
- Usually evaluated by team or shift
- The major part of managers with extended overtime
- Lack of linear processes
- Oriented too much on operational aspects

Education

- A good part of them evolved from the operative level
- Based on experience (sometimes limited, sometimes to wide)
- Usually graduated but without education into logistics field
- Very flexible and often open mind

Supply

- Often on e-job systems
- By recommendations
- Comes in groups from another company
- Newspapers

Big problem

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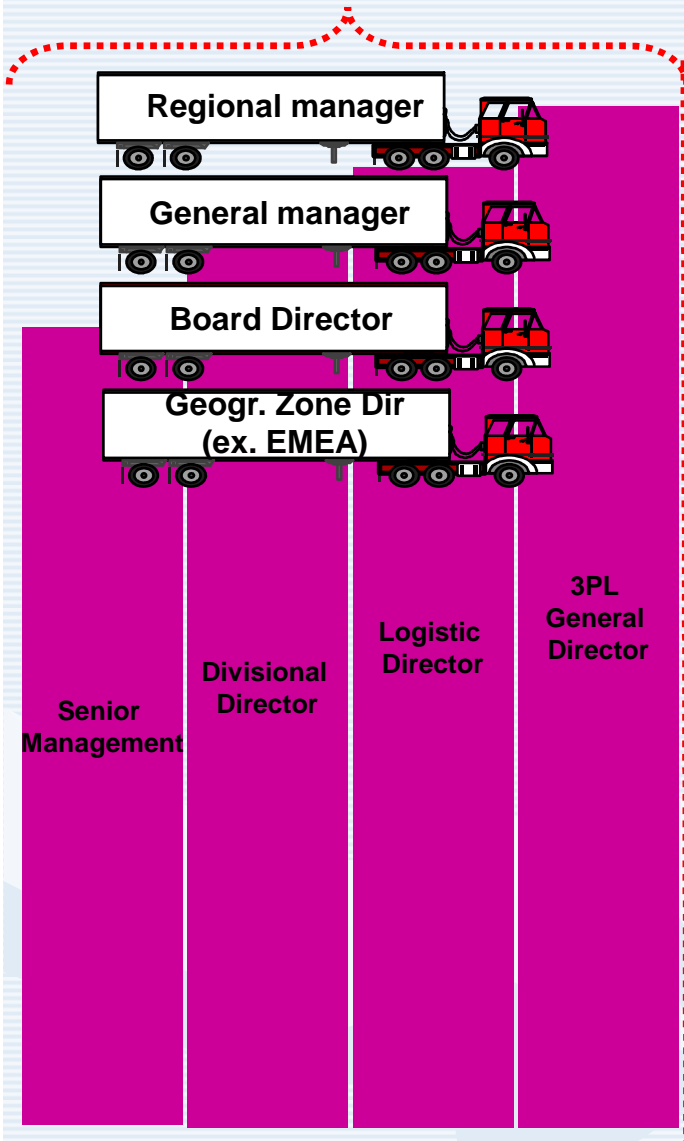
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Senior / General Management



Productivity

- Unusual to measure personal performance
- Usually evaluated by team or shift
- The major part of managers with extended overtime
- Lack of linear processes
- Oriented too much on operational aspects

Education

- A good education (some of them MBA graduated)
- Based on experience with some specialized courses
- Training oriented
- With helicopter view

Supply

- Sometimes on e-job systems
- By recommendations
- Head-hunting
- The most important newspapers

Big problem

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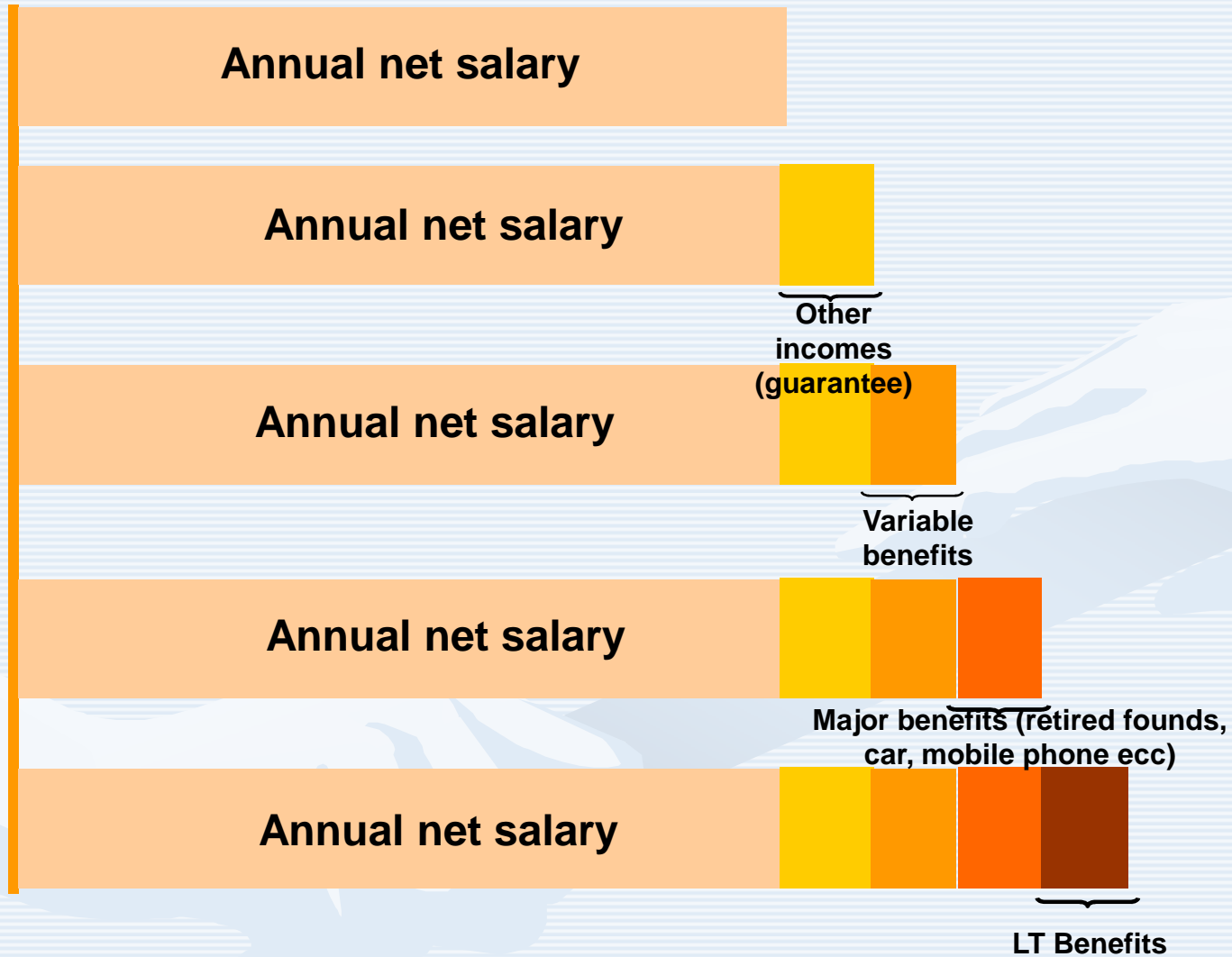
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SALARY SURVEY



SALARY SURVEY

Annual net salary (€)

ANS + other incomes +
variable benefits (€)

Min. 21600
Max. 54000

Supply Chain Manager

Min. 24000
Max. 64200

Min. 15600
Max. 32400

Logistics Manager

Min. 16800
Max. 35800

Min. 18600
Max. 31200

Transport & Distribution
Manager

Min. 19800
Max. 33600

Min. 6000
Max. 15600

Fleet Manager

Min. 8100
Max. 17800

Min. 4200
Max. 4800

Delivery Driver

Min. 5300
Max. 5900

Min. 7200
Max. 15600

Warehouse Manager

Min. 8300
Max. 16800

Min. 3600
Max. 4800

Forklift Operator

Min. 3900
Max. 5900

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ROMANIAN LOGISTICS MANAGER

- ❖ Until now, Romanian logistics managers focused mainly on the operational component which involves too much time spent
- ❖ Therefore, a lot of important aspects of logistic life are missed and that results into everyday problems



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LOGISTIC TRAINING - ROMANIA 2008 -

- ❖ After a more rigorous understanding of problems, Romanian logistics managers came to that an appropriate training is crucial for their personal and professional development and also for their companies evolutions.
- ❖ The Romanian training market is continuously increasing, having now the following forms:
 - Trainings and dedicated courses – “in house”
 - Trainings and open courses – for initiation
 - Trainings and specialisation courses – for long term
 - **Masters***
 - **Universitary courses***

***These education forms are weakly represented in the logistics and transport field.**

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FUTURE TREND

- ❖ The trend is for those to overpass these limitations given by the strictly operational involvement managing problems and become this way the new logistics manager:



Or, why not,
so:



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IDEAL LOGISTICS MANAGERS



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WHY INVESTING IN LOGISTICS IN ROMANIA

- ❖ Romania is the biggest market in South Central Europe
- ❖ Growth rate is double digit
- ❖ Workforce is literate and speaks foreign languages
- ❖ Salaries: June 2008
 - average gross salary: 480 Euro
 - average net salary: 350 Euro

Source:Tranzit Magazine

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WHY INVESTING IN LOGISTICS IN ROMANIA

- ❖ Real estate market is constantly increasing
- ❖ Estimated demand for A class warehouse spaces: 2.5mil sqm (half of it in Bucharest)
- ❖ Current warehouse loading rate: 95 %
- ❖ Warehousing market doubled in 2007 from 290k sqm to 600k sqm
- ❖ Forecast 2008:
 - 700k sqm of new warehousing spaces (half in Bucharest)
 - 20 - 30 % land price increase

Source: Transilvania magazine

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**Thank you for
attention**

Questions?

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