

PRODUCTIVITY – EDUCATION - SUPPLY ROMANIA 2008

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Bucharest, 04th of July 2008

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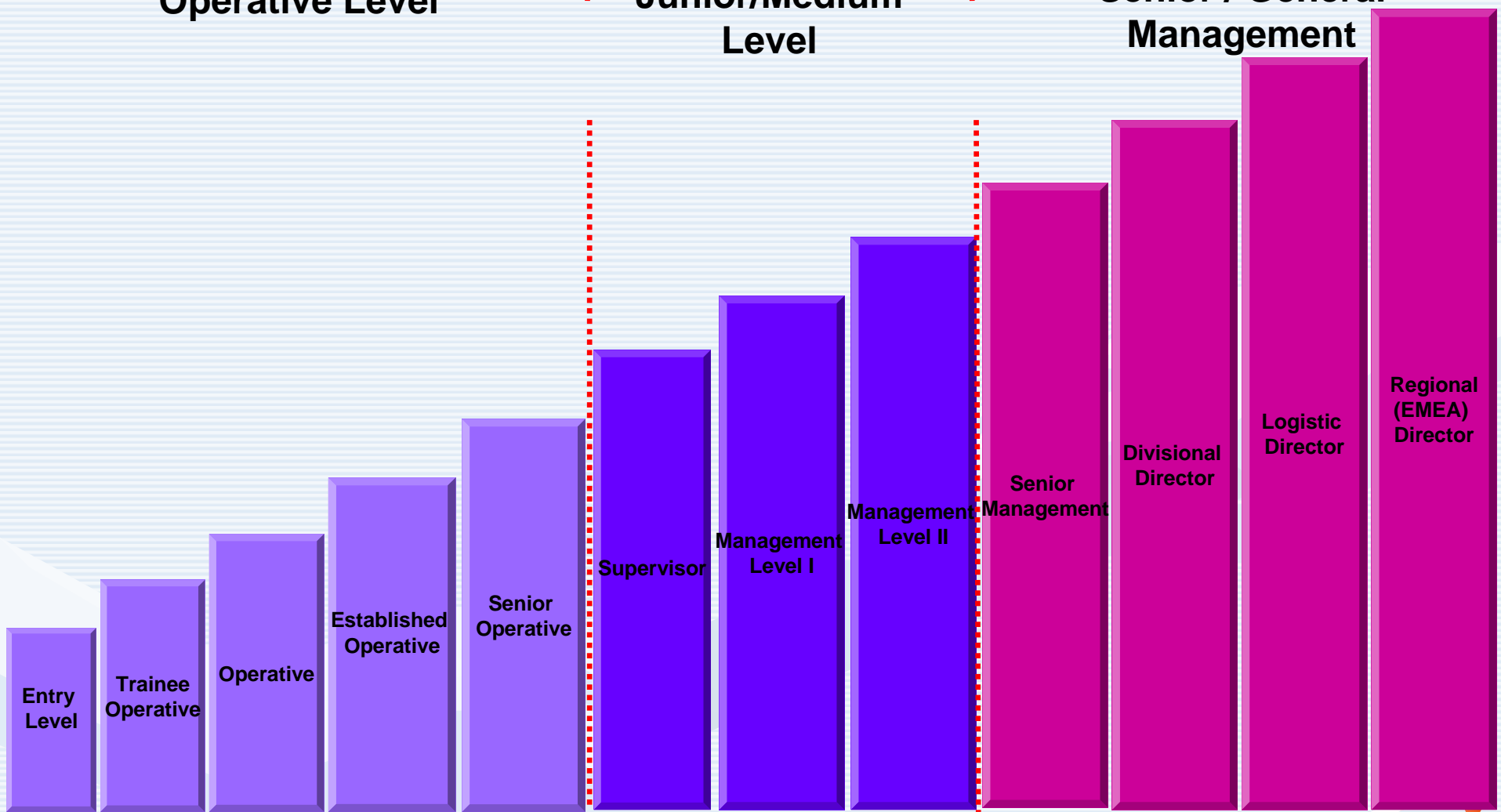
Romanian Logistics Association

Networking Supply Chain Professionals

Operative Level

Junior/Medium Level

Senior / General Management



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Networking Supply Chain Professionals

Productivity

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

Operative Level

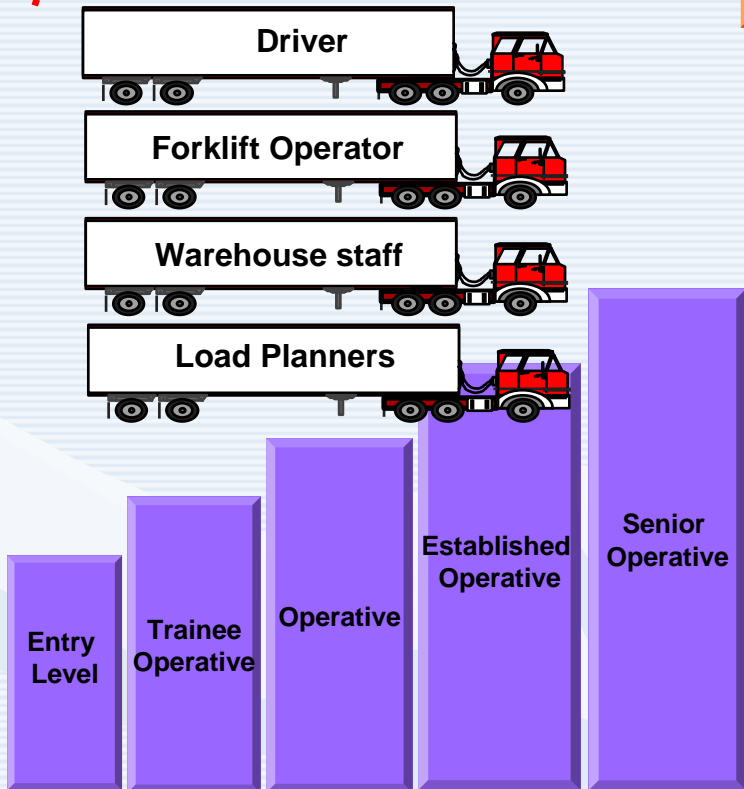
Education

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

Supply

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

Big problem

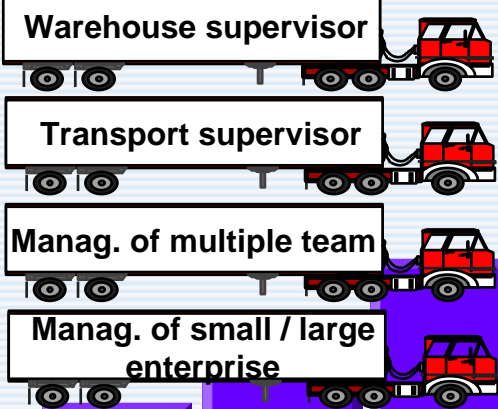


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Junior/Medium Level



Supervisor

Management Level I

Management Level II

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

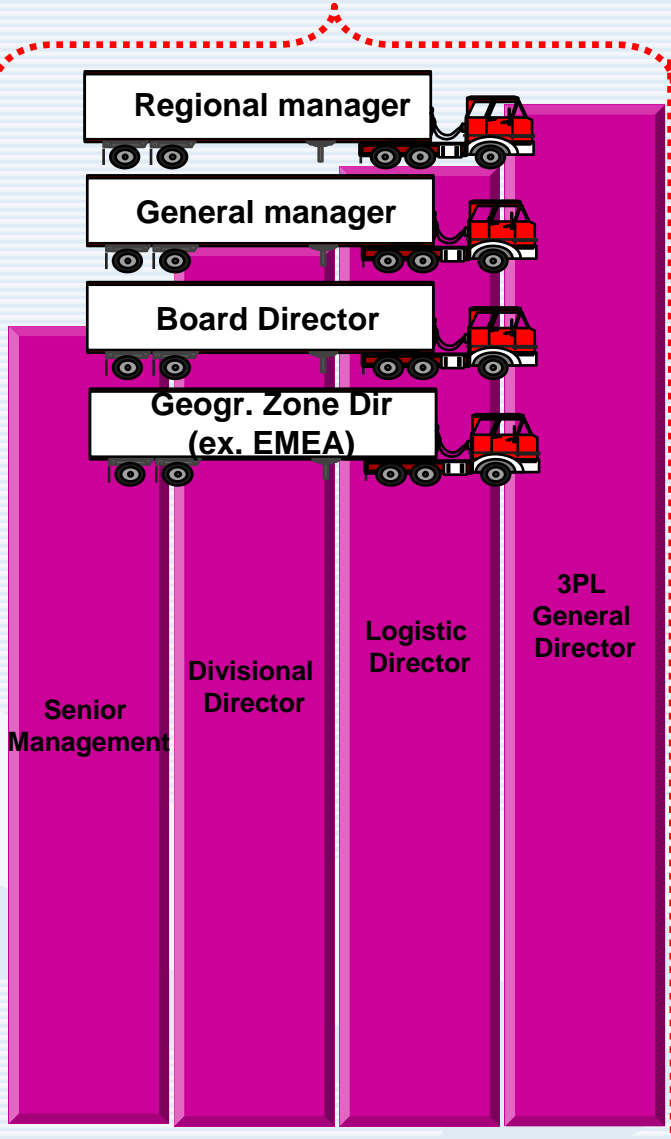
Big problem

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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

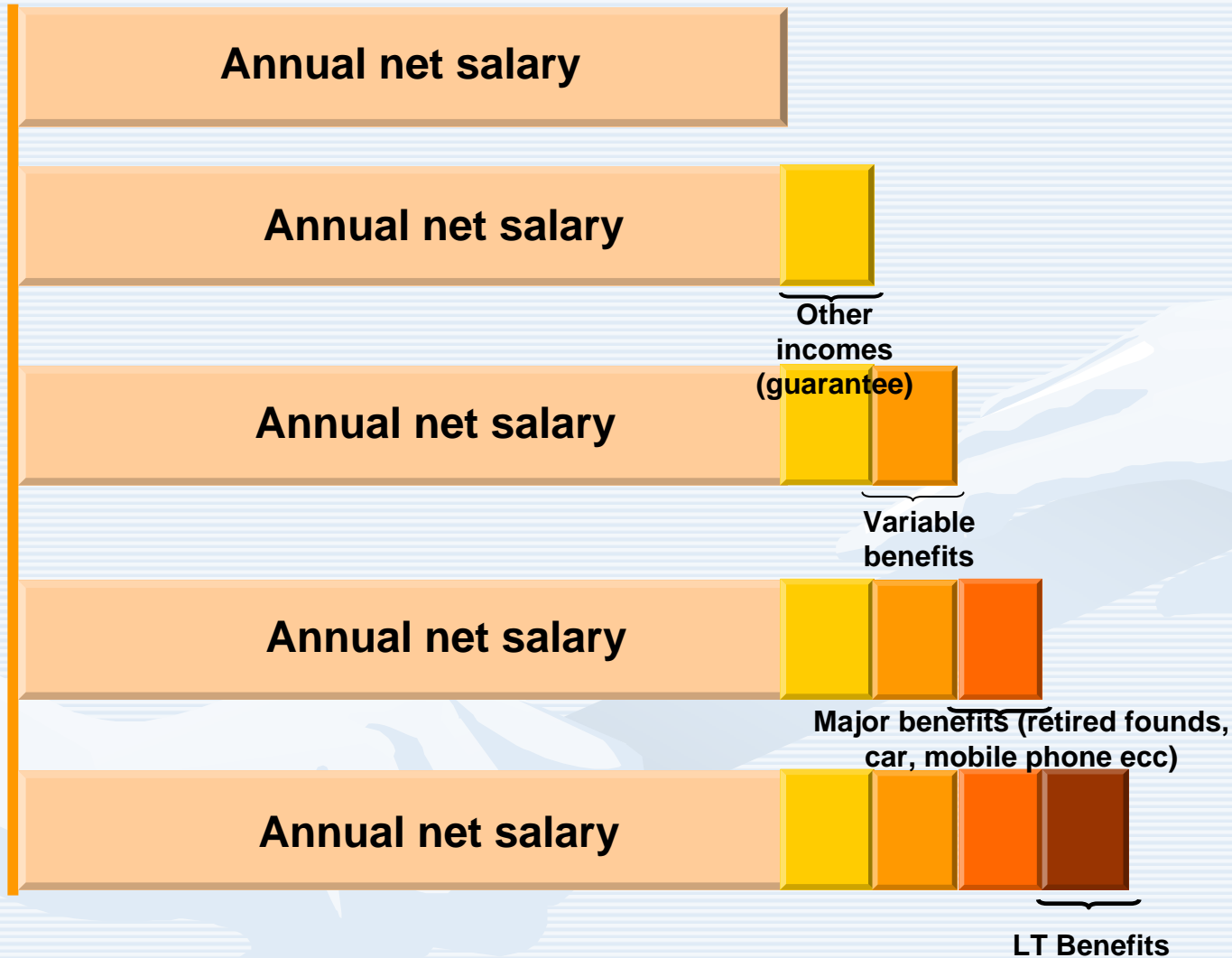
Big problem

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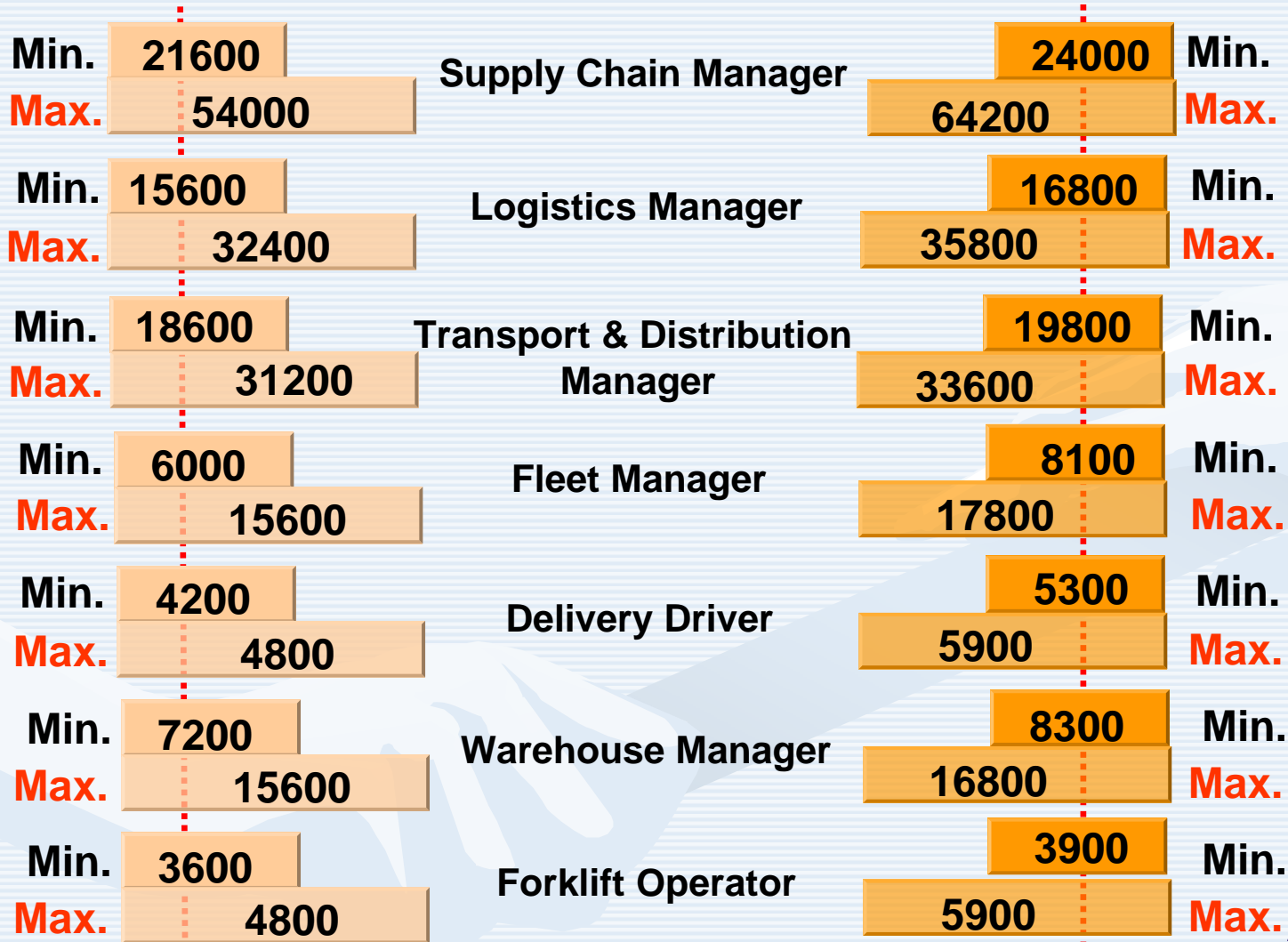
SALARY SURVEY



SALARY SURVEY

Annual net salary (€)

ANS + other incomes +
variable benefits (€)



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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The logo for ARILOG, featuring the word "ARILOG" in a bold, blue, sans-serif font with a stylized orange and blue swoosh above it.

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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: Tranzi magazine

**Thank you for
attention**

Questions?

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