



# The Hudson Report

Employment and HR Trends

Australia | July – September 2006

Part One | **EMPLOYMENT EXPECTATIONS**



Hudson

*From great people  
to great performance<sup>SM</sup>*

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## About Hudson

Hudson is a worldwide leader in the provision of specialised recruitment, managed services and talent management solutions.

Through this diverse service offering Hudson works with a variety of employers to attract, select, engage and retain the people they need to succeed.

Hudson is a division of Hudson Highland Group Inc (NASDAQ: HHGP) one of the world's leading professional recruitment, retained executive search and talent management solution providers.

More information about Hudson is available at [www.hudson.com](http://www.hudson.com)

# Introduction and Methodology

## Introduction

The Hudson Report is an established and highly reputable publication, based on in-depth, nation-wide research. Released quarterly, the Report uncovers and analyses the hiring expectations of Australian employers over the forthcoming quarter, and provides insights into a range of human resource issues currently impacting business and the broader Australian economy.

While a number of surveys currently address hiring intentions and job vacancies, The Hudson Report fills the gap in market knowledge and data on broader human resource issues and trends relevant to business leaders.

The Hudson Report for the July – September 2006 quarter consisted of interviews with 7,614 employers across Australia. It consists of two parts:

- **Part One:** Employment Expectations for July – September 2006. Released 28 June 2006.
- **Part Two:** HR Insights. Released in mid August.

## Methodology

The Hudson Report has established a reputation as a key socio-economic indicator in the Australian market. The Report's quarterly findings on permanent employment expectations are built on the premise that the expectation to increase or decrease net staffing levels represent a significant indication of employers' optimism for the growth of their organisations.

The Hudson Report frequently refers to the term 'net effect' in relation to employment expectations. The net effect figure is calculated by taking the percentage of employers surveyed that expect to increase staff levels during the quarter and subtracting the percentage of employers surveyed that expect to decrease staff levels.

The Hudson Report combines the expectations of key employment decision makers from all major industries across small (<20 employees), medium (20–200 employees) and large (> 200 employees) organisations, and extrapolates the findings in relation to other key economic indicators (i.e. interest rates, housing figures).

For the July – September 2006 quarter, 7,614 employers were personally surveyed by Hudson recruitment and consulting professionals. Participants were surveyed from 18 core industry groups, aligned with the Australian Bureau of Statistics industry classifications, as detailed below:

- Advertising/Marketing/Media
- Construction/Property/Engineering
- Education
- Financial Services/Insurance
- FMCG
- Government
- Healthcare (private)
- Healthcare (government)
- Information Technology
- Manufacturing
- Non Profit
- Professional Services
- Resources
- Retail
- Telecommunications
- Tourism/Hospitality
- Transport
- Utilities
- Wholesale/Distribution

# Summary of Key Findings

## Permanent Employment Expectations

- Employer sentiment has increased slightly, for the second consecutive quarter. Up 0.2pp, the current net effect is +30.8%.
- Of the 7,614 employers surveyed, 37.4% anticipate an increase in permanent staffing levels, 6.5% expect a decrease, while 56.1% expect to maintain current staffing levels.
- It is again the resource rich states of Queensland and Western Australia that hold the highest level of employer sentiment, while the southern states display outlooks that are more conservative.
- Victoria, Queensland and South Australia are more optimistic than last quarter, up 4.6pp, 3.7pp and 2.0pp respectively. Victoria is no longer the least optimistic state and Victorian employers are the most optimistic they have been all year.
- The information technology industry, with a net positive 45.4%, has recorded the highest level of optimism of all the industries surveyed. The telecommunications industry recorded the highest surge in sentiment, up 15.9pp.

## Contracting/Temporary Workforce

- Over two thirds of employers (67.3%) have held their contracting/temporary workforces steady for the April – June 06 quarter. The net effect of +16.8% is up 0.8pp.
- Western Australia, despite a decrease on last quarter, has recorded the strongest results for contracting/temporary recruitment, with a net effect of +30.7%. Only 4.0% indicated a decrease in contracting numbers over the last three months.
- Analysing by sector, the most positive results have been recorded by the education sector. With a net effect of +30.1%, this is the highest increase recorded by this sector in over three years.

# Permanent Employment Expectations

## Overall

The Hudson Report survey of permanent employment expectations indicates that national employer sentiment remains historically healthy after a second quarterly increase. Up 0.2 percentage points (pp), a net +30.8% of employers expect to increase permanent staffing levels over the July – September 06 quarter.

Positive net effects have been recorded in all states and territories surveyed once more. However, increases in employer sentiment in Victoria, South

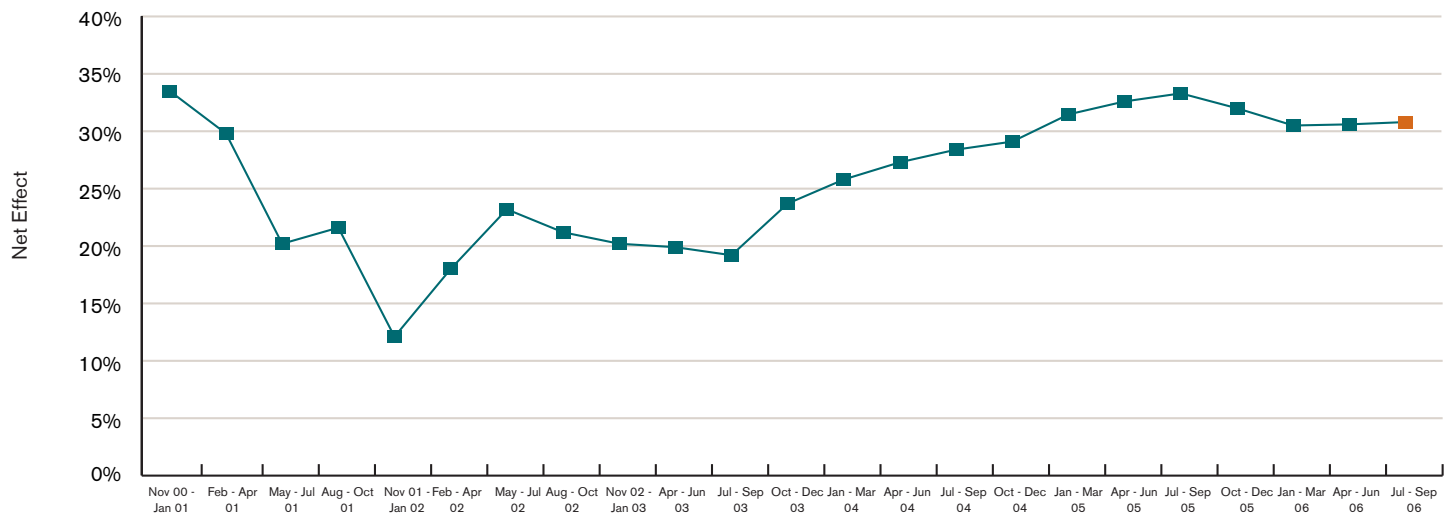
Australia and Queensland have been marginally offset by declines in the ACT, Western Australia and New South Wales.

The resource rich states of Western Australia and Queensland continue to lead the way, as they have done since December 05. With a net positive 50.7% of employers expecting to increase permanent employment levels over the July – September 06 quarter, Western Australia is again the most optimistic of all states surveyed. Whilst down 5.6pp on last quarter, the result remains extremely positive. Employer

sentiment in Queensland has increased by 3.7pp, with a net positive 44.8% of Queensland employers expecting to increase permanent staff levels.

Employers in both the ACT and New South Wales have recorded a drop in employer sentiment. Sentiment has dropped 0.6pp in the ACT to return a current net effect of +38.0%. Employers in New South Wales are now the least optimistic nationally, having dropped 3.6pp. Whilst lower than last quarter, the current net effect of +26.1% is still historically healthy.

National Permanent Employment Expectations (November 2000 - September 2006)



# Permanent Employment Expectations

For the first time in 2006 Victorian employers are not the least optimistic. In fact, they have recorded the highest increase in sentiment, up 4.6pp to return a current net effect of +30.6%. Similarly, South Australia has recorded an increase in sentiment on last quarter. A net positive 30.4% of South Australian respondents expect to increase permanent employment levels over the coming quarter, representing a positive movement of 2.0pp.

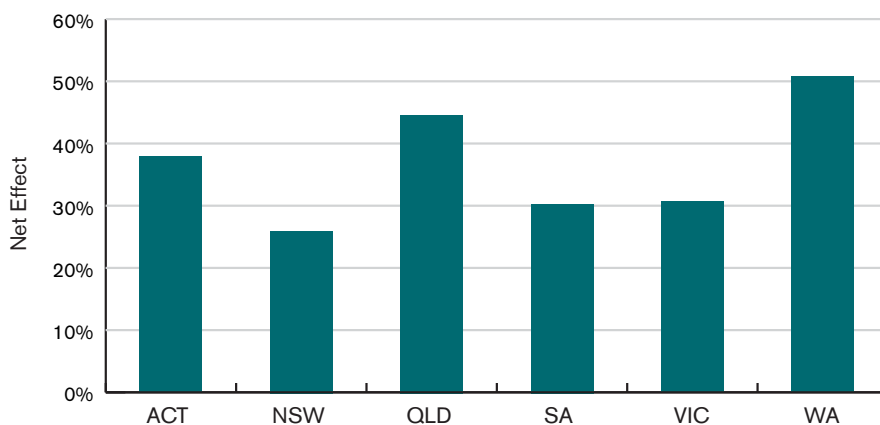
With a national unemployment rate of 4.9%<sup>i</sup>, the lowest in nearly three

decades, the labour market remains extremely tight. As a result of this, employers are continuing to experience restricted pools of readily available talent, and as a result of the historically high participation rates there are continuing pressures on labour costs.

With the upward pressures on wages, accompanied by the increase in world oil prices, over the coming months we are likely to experience further upward pressures on inflation and as a consequence, interest rates.

Consequently, employers seem to be in a phase of consolidation. Nationally, there has been a further increase, of 1.1pp, in the percentage of employers maintaining current staff levels (56.1%). It would seem that employers are focusing their efforts on maximising their current workforce in light of the current skills shortage. In today's employment landscape, the development and retention of key talent is critical and employers, more so than ever, are required to implement strategic and creative solutions.

Permanent Employment Expectations (July - September 2006):  
By State/Territory



<sup>i</sup> ABS, Labour Force, Australia, May 2006

# Permanent Employment Expectations

## By Industry

- The IT industry recorded the highest level of employer sentiment with a net +45.4%.
- The telecommunications sector recorded the largest increase in employer sentiment, up 15.9pp to a net +37.9%.

For the July – September 06 quarter, eight of the eighteen industry groups surveyed expressed employer sentiment in excess of last quarter. The **telecommunications** sector recorded the largest increase in employer sentiment, up 15.9pp to a current net effect of +37.9%. The results for the telecommunications sector indicate that the sector has rebounded from the historically low figure recorded for the January – March 06 quarter.

Driving the increased optimism is the fact that consumers are continuing to use greater volumes and adopt a greater range of telecommunications services. The growing demand for services, coupled with increasing competition, has created employment opportunities in most sub-sectors of the telecommunications industry.

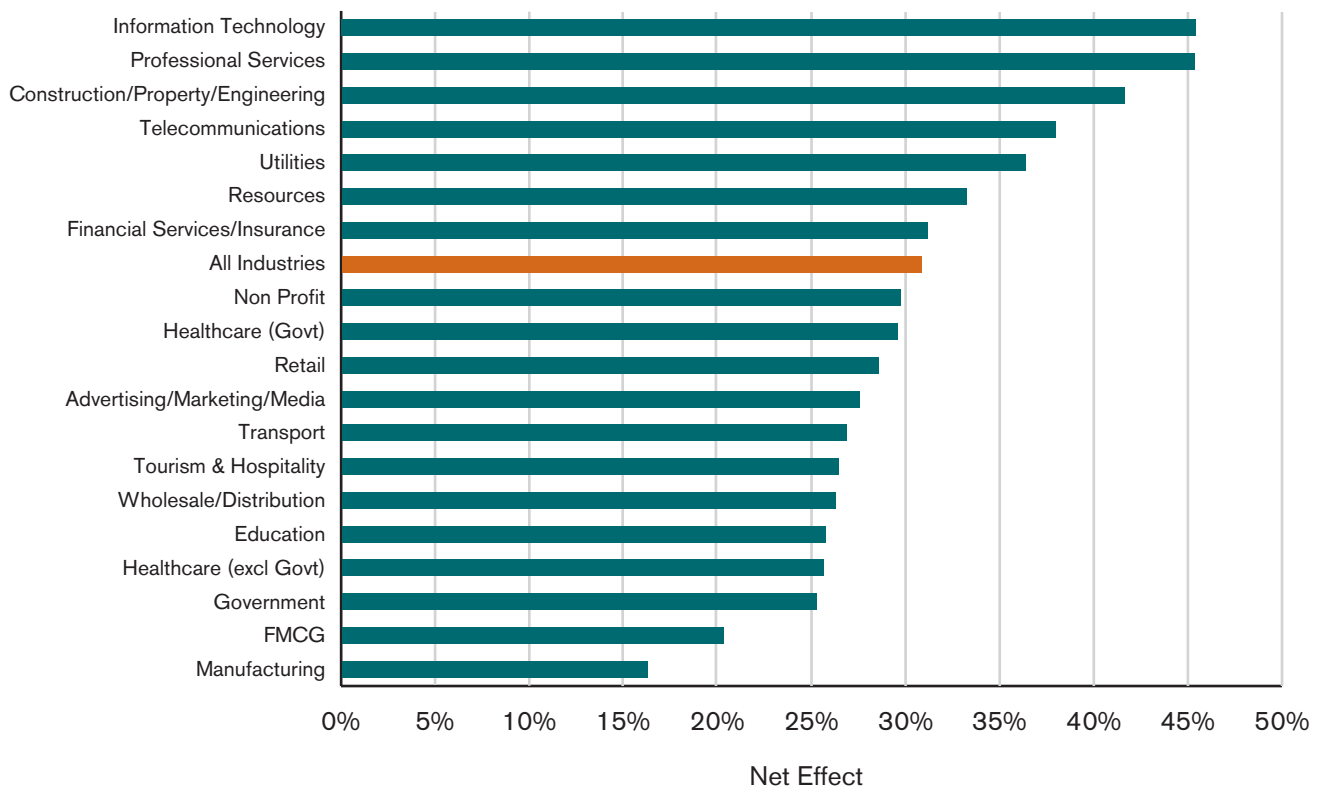
Employers in the IT sector are the most optimistic of all industries surveyed. A net positive 45.4% of IT employers intend to increase permanent employment levels over the July – September 06 quarter. A result that is up 6.6pp on the previous quarter and is 14.6pp above the industry average.

The ongoing demand for candidates from companies in the IT sector is being driven by IT system upgrades and implementation projects, particularly in

the ACT and VIC. The 2006–07 federal budget has also had an impact on IT employer sentiment for the coming quarter. Substantial gains include new measures to encourage venture capital investment, IT funding in the education sector, improved IT depreciation arrangements for businesses, and investment in systems upgrades<sup>1</sup>.

Business process improvement and the growing of customer relationships remain top priorities for businesses. IT spending is being supported by the fact that these initiatives usually require significant investment in technology. Business intelligence, security, mobile workforce enablement and collaboration tools are continuing areas of strong demand for IT vendors.

National Permanent Employment Expectations (July - September 2006):  
By Industry



<sup>1</sup> www.budget.gov.au

# Permanent Employment Expectations

The **resources** sector has, with a net positive 33.2%, recorded a 0.2pp increase on the last quarter. The major mining areas of Queensland, Western Australia and the Newcastle region of New South Wales continue to show robust expectations of growth.

The mild downward shift in the resources sector over recent quarters can be attributed to the increasing costs of project and operating inputs, and recent volatility in commodity prices and exchange rates, giving rise to increased caution in hiring. Many major projects are now underway and there is a large dollar-value project pipeline in Australia. However, increased concern in regard to the forward commercial feasibility of some of these current early-stage projects has lowered employment expectations slightly.

The **government** sector, with a net positive 25.2%, is 2.4pp below that recorded three months ago. The influences affecting government sentiment are the major areas of funding reflected in both federal and state budgets as well as a number of state elections either at the end of 2006 or in the first quarter 2007. At the same time various state governments have also announced modest reductions in headcount.

The **retail** sector, at net positive 28.5%, has recorded a decline of 3.0pp on last quarter to return the lowest level of optimism since June 04. Given the continuing high price of petrol, an economic environment where both inflation and interest rates are facing upward pressures, and a decline in consumer confidence, the results for the retail sector are to be expected. However, the results do remain historically healthy with strong demand for experienced store managers, merchandise planners and buyers.

Employer sentiment among **FMCG** employers has increased by 3.1pp to return a net effect of 20.3%. As major retailers move towards stronger house brands, product rationalisation and development has created a high demand for FMCG marketing talent.

Although a decline of 2.3pp was recorded, the **construction/property/engineering** sector continues to return very positive employer sentiment. While there has been a decline in residential housing developments on the eastern seaboard, non-residential building investment and major infrastructure projects continue to drive high employment expectations.

Employer sentiment for the **private healthcare** sector is expected to be slightly lower for the July – September 06 quarter, with a current net effect of +25.6%.

The first half of the year was influenced significantly by resignations following salary and performance reviews. Many of these roles will have been backfilled by Q3, reducing hiring activity into the September 06 quarter.

In an attempt to combat the skill shortages and minimise the impact of vacant territories, a number of organisations have, or are looking to, employ "floating sales representatives" to ensure a pipeline of talent. These representatives will typically be hired in the territories that experience the highest turnover. It also enables organisations to manage maternity leave more effectively.

# Permanent Employment Expectations

## Australian Capital Territory

- Employer sentiment in the ACT remains stable with a net effect of +38.0%, down a minor 0.5pp.
- The strongest employment outlook was in the information technology sector, with a net +52.2% expecting to increase their permanent staffing levels in the July – September 06 quarter.

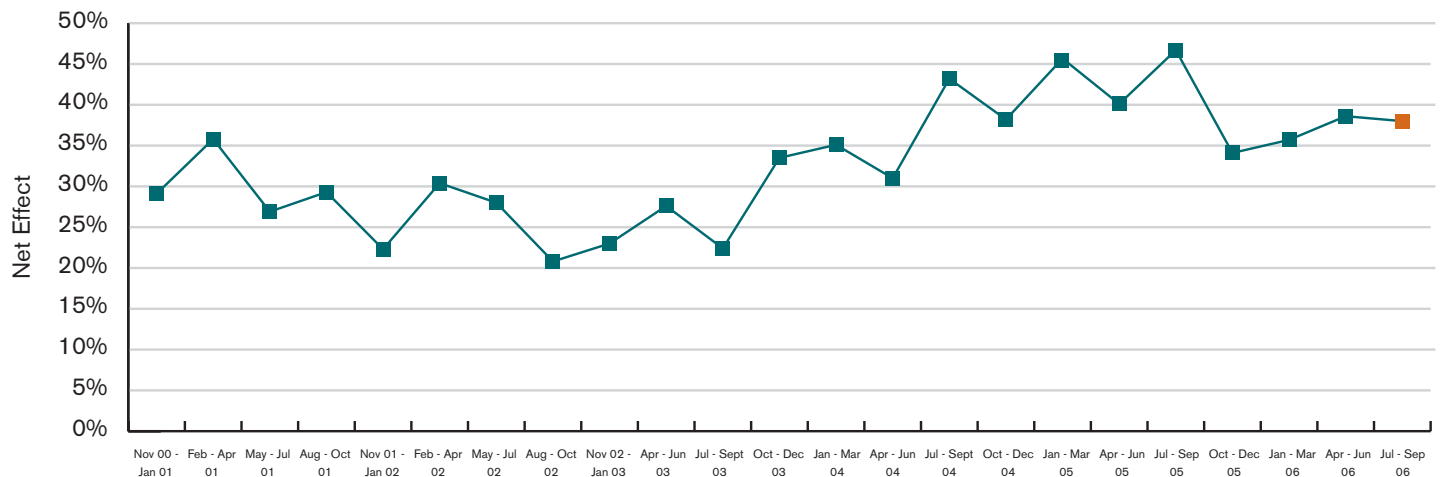
With a net positive effect of 38.0%, the employment outlook for the ACT remains stable. The general outlook for the July – September 06 quarter in the ACT is very positive with both Federal Government and information technology employers looking to increase their staffing levels.

Of the organisations surveyed, only 6.7% are looking at reducing their permanent staffing levels, 44.7% expect to increase their staffing levels, whilst 48.6% will maintain their current staffing levels.

The strongest employment outlook was in the information technology sector, with a net +52.2% expecting to increase their permanent staffing levels in the July – September 06 quarter. This may be attributed to the Federal 2006–2007 Budget's positive support for technological development and some major systems redevelopment.

There was also a stronger positive employment outlook for the government sector, with a net effect that was 4.1pp higher than for the previous quarter.

ACT Permanent Employment Expectations (November 2000 - September 2006)



# Permanent Employment Expectations

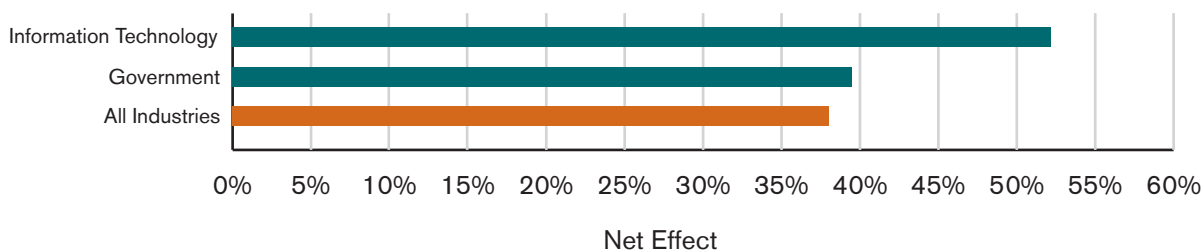
The strong economy, the low unemployment rate, the ACT's low population growth and the continued positive employment outlook will compound the existing skills shortage in the ACT.

The highest areas of demand, especially in the first quarter of the financial year, reflect an ongoing need for IT, legal, accounting and finance personnel. In Federal Government there remains high demand for professionals at all levels with particular demand in mid to senior management roles spanning broad policy, defence, procurement and business management.

The new IT projects in the government sector will also cause demand to increase for business analysts, project and contract managers and IT security.

More than ever, employers need to address issues that impact retention rates. In particular, employers need to recruit staff that have a strong organisational fit and provide current staff with the necessary training to fill any skills gaps.

ACT Permanent Employment Expectations (July - September 2006):  
By Industry



# Permanent Employment Expectations

## New South Wales

- NSW employer sentiment softens for second consecutive quarter, with a net +26.1%.
- The IT sector is again the most optimistic of all industries in NSW, with a net +42.4%.

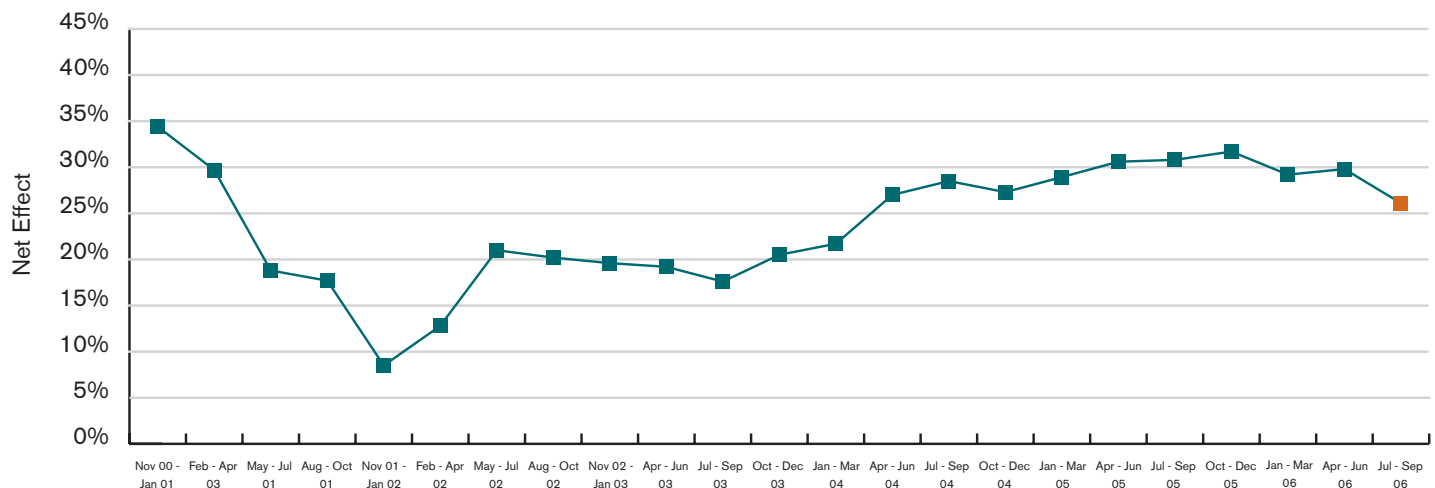
Employer sentiment has softened for the July – September 06 quarter, down 3.7pp to return a current net effect of +26.1%.

The New South Wales Government has forecast economic growth of approx 2.5% for 2006-2007<sup>2</sup>, whilst the national figure is looking to be 3% and above. The overall drop in NSW employer optimism reflects a continued nervousness about the NSW economy.

The current level of employer sentiment does remain positive and is being driven by strong optimism within the IT, telecommunications and professional services sectors.

The IT sector, at net +42.4%, is the most optimistic industry in the state. In fact, the current level of IT employer sentiment is the highest recorded for the sector in over four years. Some IT organisations appear to be in an aggressive expansion mode and are driving hard to win new business. Employers are willing to pay at the top end of the market to secure specialist skill sets. Pre-sales staff and technical consultants to work alongside the IT sales teams are in particular demand at present.

NSW Permanent Employment Expectations (November 2002 - September 2006)



<sup>2</sup> <http://www.treasury.nsw.gov.au/bp06-07/bpapers.htm>

# Permanent Employment Expectations

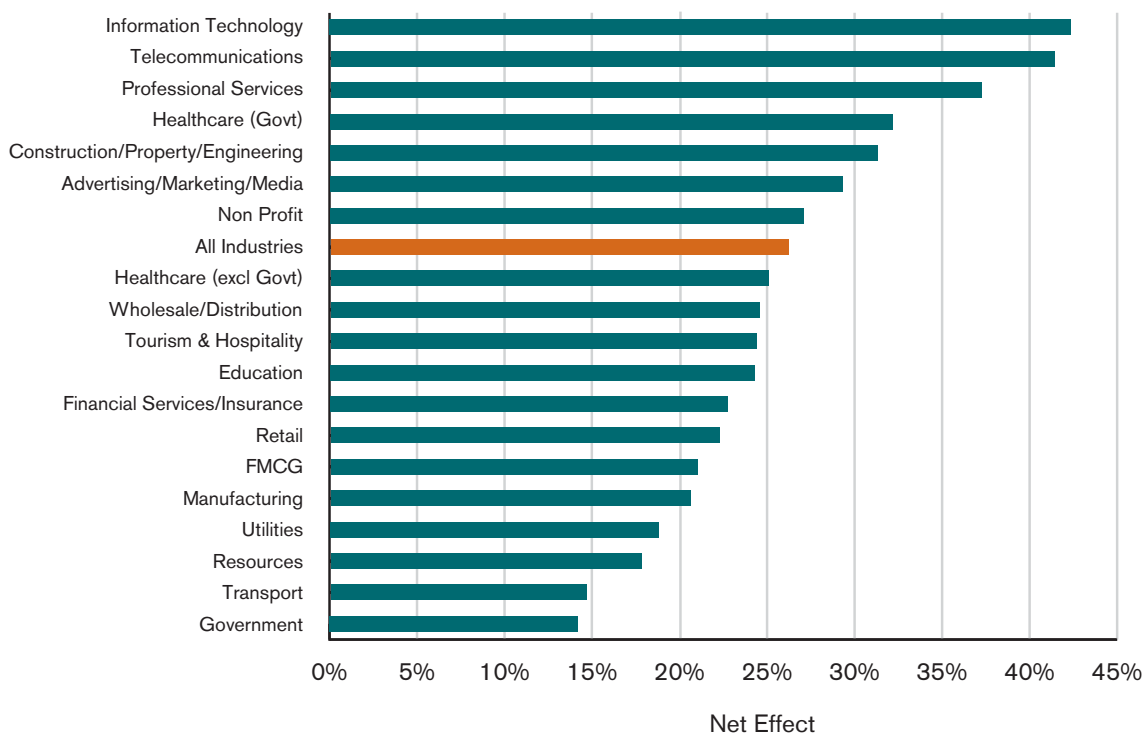
Sentiment in the telecommunications sector has rebounded significantly from lows recorded six months ago. Up a substantial 23.5pp, a net positive 41.4% of employers anticipate an increase in permanent employment levels over the July – September 06 quarter. A number of Telco's have started hiring again after periods of

rationalisation. A number of new projects have seen an increased demand for highly technical engineers/architects/testers.

At a net positive 14.2%, the results for the government sector are 6.5pp down on last quarter. The results for this sector are not entirely unexpected. It

has been widely reported that NSW Government will be decreasing overall staff numbers within the next 12 months, particularly at the management level as well as in back office positions.

NSW Permanent Employment Expectations (July - September 2006):  
By Industry



# Permanent Employment Expectations

## Newcastle/Hunter

- Employer sentiment increases by 4.1pp in the Hunter, with a net +42.8%.
- The resources industry is the most optimistic, with a net +55.6%.

Sentiment for employers in the Hunter region has increased 4.1pp with a net positive 42.8% of employers indicating that they would increase permanent employment levels over the July – September 06 quarter. Contributing to the high level of sentiment is the resources boom, which is having a

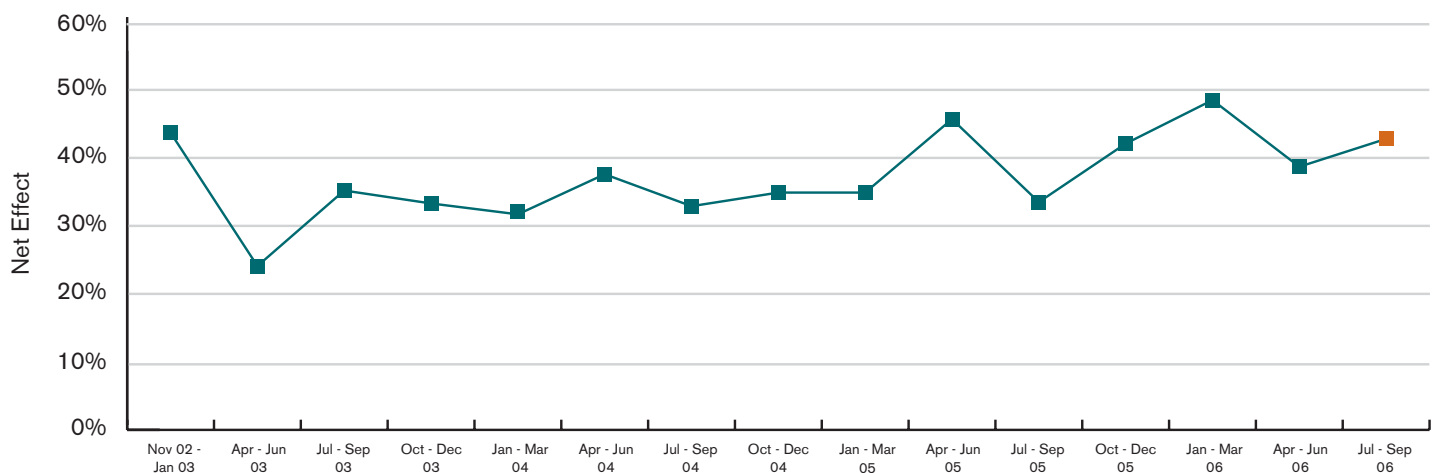
knock-on effect in the manufacturing and engineering sectors. As a result of the effects of the local resources industry, the Hunter region continues to show sentiment well in excess, 16.7pp, of the NSW average.

The residential construction market has, as it has across all NSW, slowed down. However, civil and commercial developments are moving at a steady level. Combined with the strong engineering sector, a net +54.5% of construction/property/engineering employers intend to increase permanent employment levels over the coming quarter.

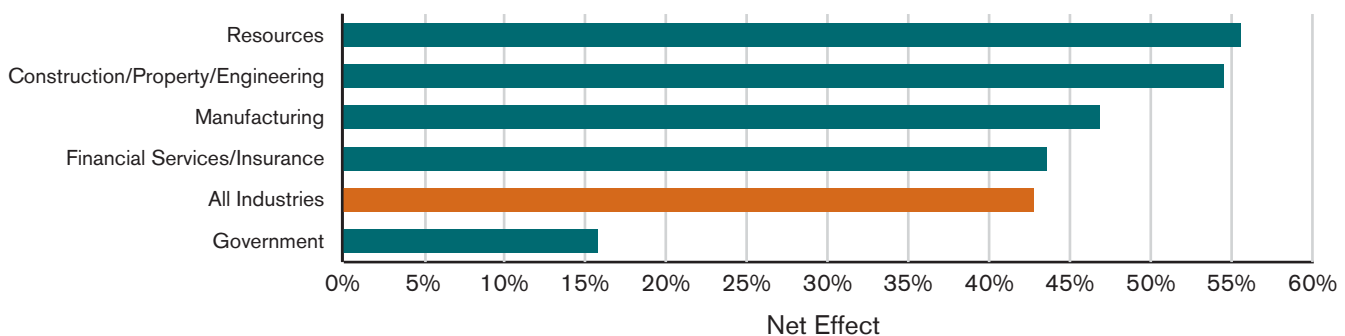
The local financial services/insurance market is strong, with a net +43.6% of employers in the sector looking to increase permanent staffing levels for the July – September 06 quarter.

As is the case in other resource rich regions in Australia, employers in this region continue to display very positive results. For the resources sector itself, a net +55.6% of employers intend to increase permanent employment levels over the coming quarter.

Newcastle/Hunter Permanent Employment Expectations (November 2002 - September 2006)



Newcastle/Hunter Permanent Employment Expectations (July - September 2006): By Industry



# Permanent Employment Expectations

## Queensland

- High levels of construction and population growth drive record levels of employer sentiment.
- Financial services/insurance records the largest increase in employer sentiment, up 19.1pp to a net +71.6%. An all time high.

Continuing high levels of construction activity and population growth have again resulted in strong employer sentiment in Queensland. Sectors to have benefited are the professional services, financial services/insurance and construction/property/engineering sectors.

The financial services/insurance sector, net positive 71.6%, and the professional services sector, net positive 59.7%, continue to return high levels of employer sentiment.

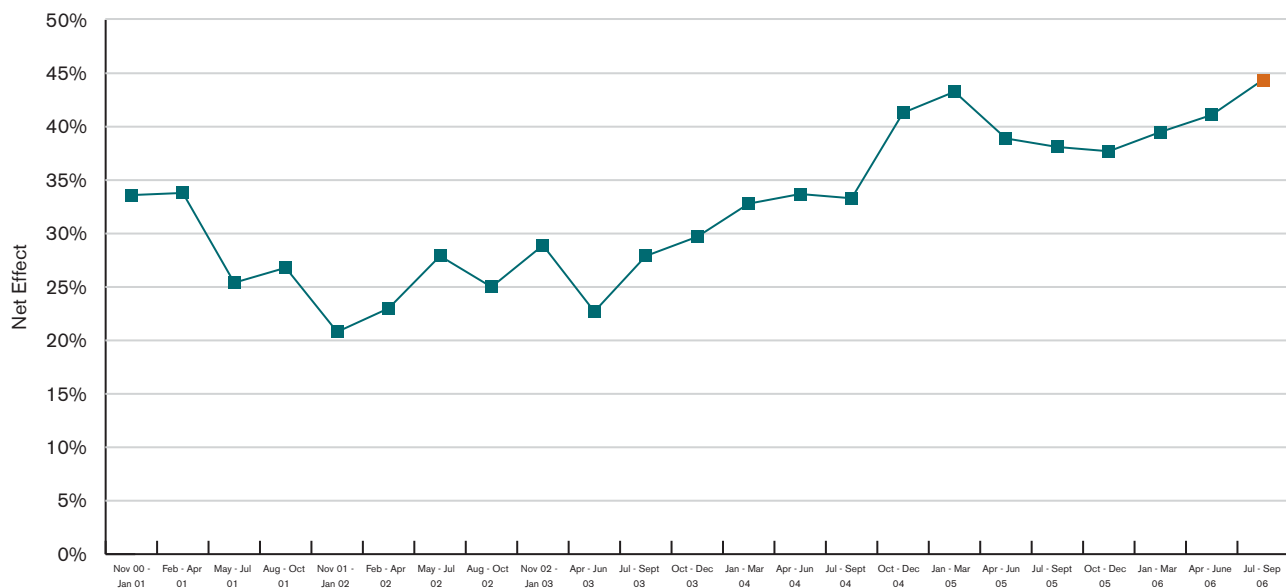
The resources sector, with a net positive 46.7% of employers indicating that they will increase permanent employment levels over the coming quarter, continues to be extremely positive. These results represent a 1.8pp increase on last quarter.

The flow on effects of investments in the resources sector has led to a net +69.2% of employers in construction/property/engineering indicating an increase in permanent

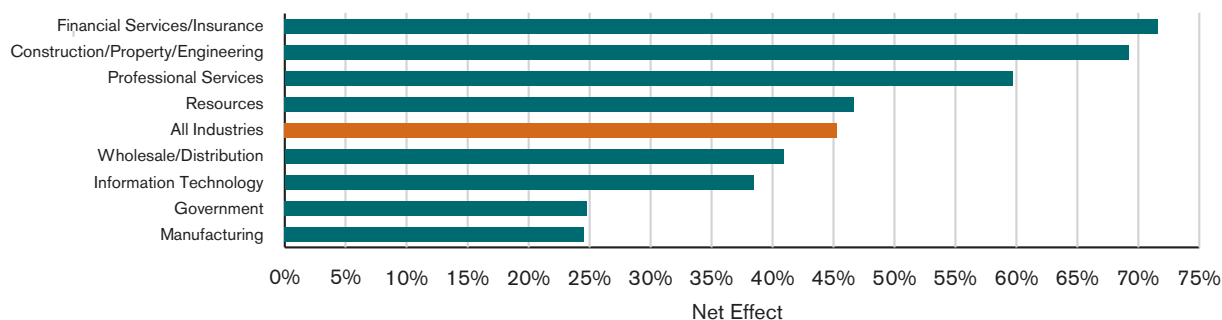
employment levels over the coming quarter. This is 10.1pp higher than last quarter and 24.4pp higher than 12 months ago.

In light of the skills shortage many Queensland employers are looking interstate and overseas for candidates to fill available roles. Recently, main overseas target areas have been New Zealand and Europe for financial and professional services candidates, and South Africa and Asia for candidates within the resources and construction sectors.

QLD Permanent Employment Expectations (November 2000 - September 2006)



QLD Permanent Employment Expectations (July - September 2006):  
By Industry



# Permanent Employment Expectations

## South Australia

- Employer sentiment increases for the second quarter, up 2.0pp to a net +30.4%.
- Construction/property/engineering sector the most optimistic, with a net +47.3%.

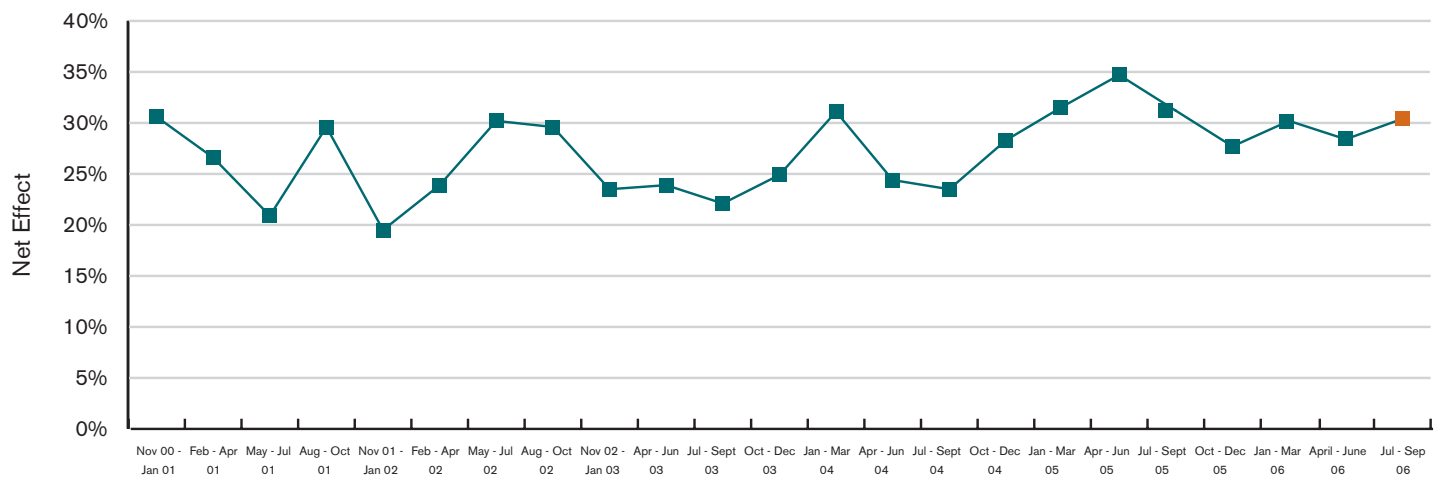
South Australian permanent employment intentions have increased

by 2.0pp over the last quarter, with a current net effect of +30.4%. Growth in the financial services/insurance, construction/property/engineering, manufacturing and surprisingly, given the increase in oil prices, the transport sector, have been offset by declines in the government and professional services sectors.

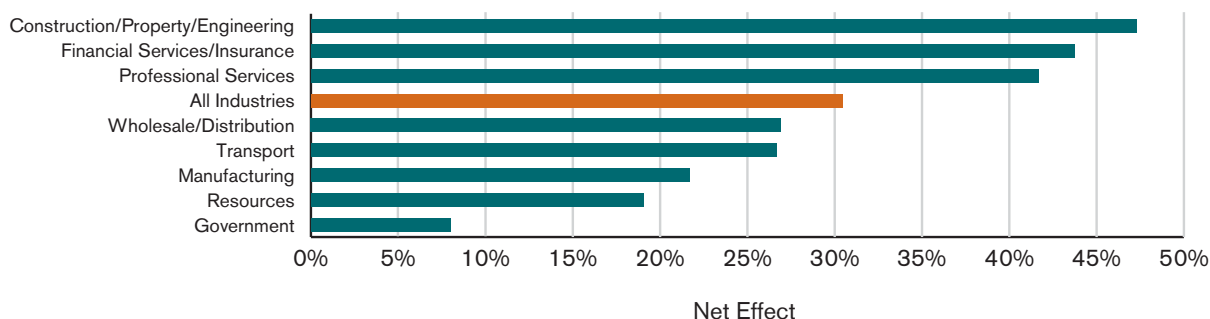
There has been a sharp decrease in employer sentiment for the government sector over the last quarter. With a net

positive 8.0% of respondents stating that they intend to increase permanent employment levels in the coming quarter, this represents a significant 24.0pp decline in sentiment over the previous quarter. Public service employment reviews, with stricter controls and approvals for headcount increases or replacements, accompanied by increased scrutiny with budget reductions, are having a significant impact on the sector.

SA Permanent Employment Expectations (November 2000 - September 2006)



SA Permanent Employment Expectations (July - September 2006):  
By Industry



# Permanent Employment Expectations

The defence and resources sectors are being followed with close interest, as they are two of the main hopes for economic growth in South Australia. However, the results of the survey do not indicate any great impetus in these areas at this stage. Both industries have long start-up phases and the impact of demand for people has yet to be felt.

Potential growth in defence, resources and mining are having a positive impact on the construction/property/engineering sector, with a net +47.3% of employers within the sector looking to increase permanent staff levels for the July – September 06 quarter.

Financial services/insurance continues to return high levels of employer sentiment on the back of changes in superannuation and improved market conditions for share portfolios.

# Permanent Employment Expectations

## Victoria

- Employer sentiment the highest level recorded all year, at net +30.6%.
- Professional services and IT industries record the highest level of optimism, with net effects of +50.0% and +49.8% respectively.

Employer sentiment in Victoria has rebounded from two recent consecutive drops in sentiment. At a net positive 30.6%, sentiment is up 4.6pp on the April – June 06 quarter and is at its

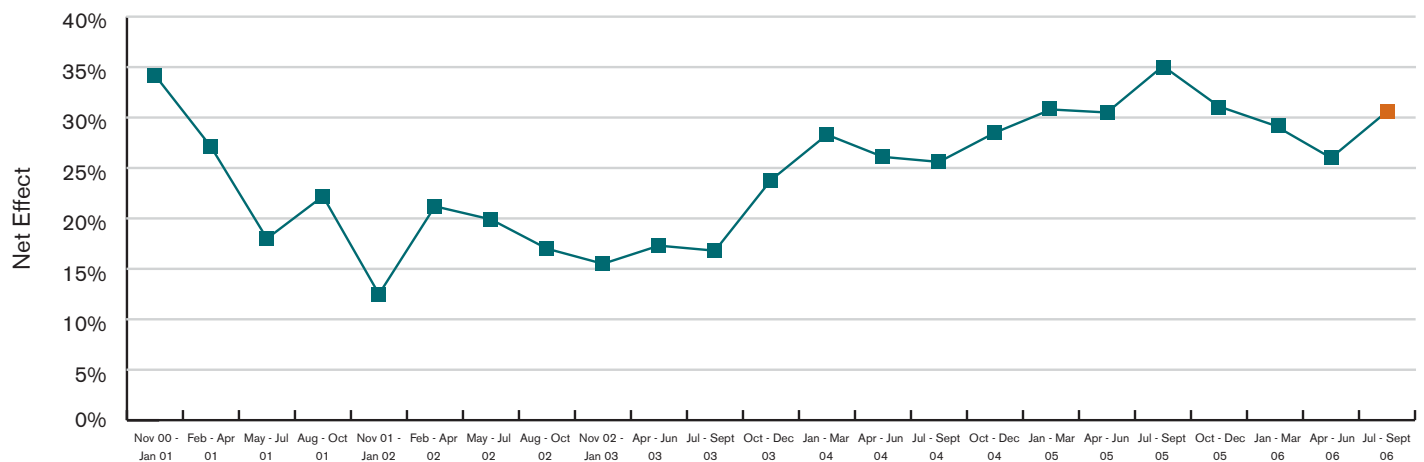
highest level all year. There has been a significant 17.5pp increase in the information technology sector, at a net positive 49.8%.

The growth in employment optimism in the information technology sector can be explained by the significant IT infrastructure investments recently announced within the telecommunications sector and state government departments. In addition, due to Australia's appreciating terms of trade, as a result of the resources boom, there has been upward pressure

on the Australian dollar. Reducing labour costs by investing in new technologies is being seen as a clear way to mitigate the impacts of a higher Australian dollar for non-resource exporters.

The manufacturing sector, with a current net effect of +10.5%, has recorded the lowest sentiment of any sector in Victoria for the second quarter. Sentiment has however increased slightly, 1.9pp, from the April – June 06 quarter.

VIC Permanent Employment Expectations (November 2000 - September 2006)



# Permanent Employment Expectations

Employer sentiment has dropped 21.8pp within the wholesale/distribution sector to return a current net effect of +22.2%. Industry consolidation, combined with high petrol prices, is behind the slowing demand for labour within the sector.

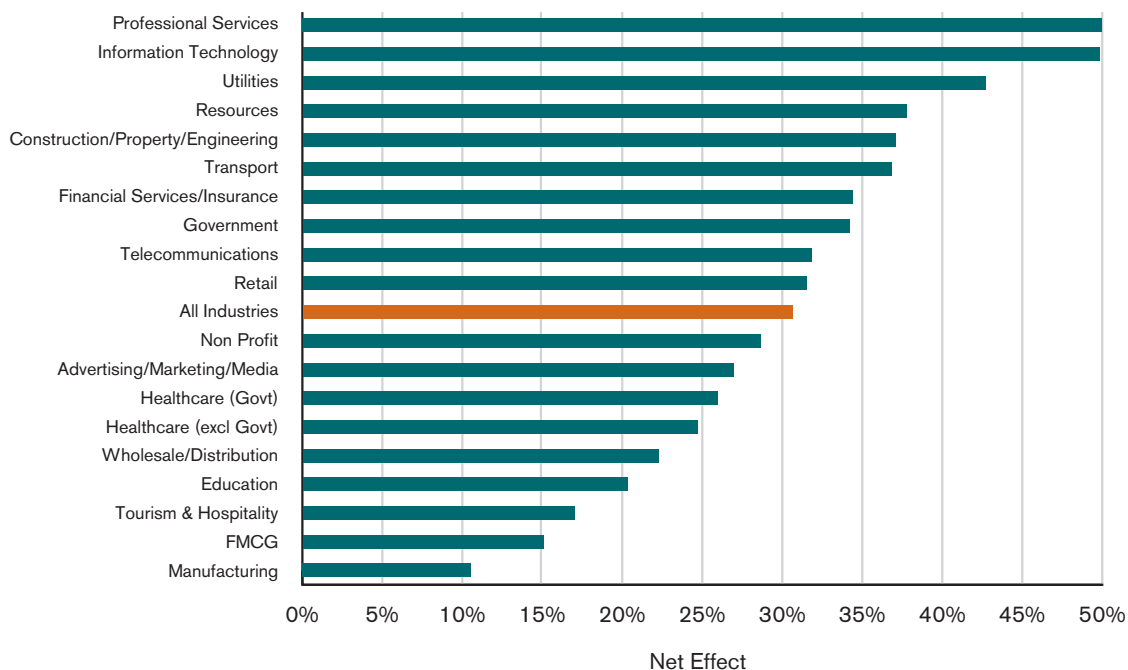
In contrast, employer sentiment has increased by a significant 19.7pp within the utilities sector. A net positive 42.7% of employers expect to increase permanent staffing levels over the July – September 06 quarter. Having led the

way in privatisation, the Victorian utilities sector is well placed to capitalise on the opportunities presented as the national utilities market opens up.

Looking forward, the clear threat to continued employment growth in Victoria will be the ability to remain competitive on a global scale. Recent investments in infrastructure announced by the Victorian Government are expected to drive growth in employment levels, particularly when combined with

progressive payroll tax cuts and a drop in WorkCover premiums. The Victorian Government's increased support for schools and the announcement of the \$500 Trades Bonus are good investments in Victoria's human capital at a time when the demand for skilled labour continues to tighten.

VIC Permanent Employment Expectations (July - September 2006):  
By Industry



# Permanent Employment Expectations

## Western Australia

- Employer sentiment drops, yet remains extremely positive, at a net +50.7%.
- Resources boom continues to drive employer sentiment across all sectors.

Despite a reduction of 5.6pp in sentiment when compared to the April – June 06 quarter the overall sentiment, at a net positive 50.7%, remains extremely positive. The buoyant economy, fuelled by the continuing resource boom, shows no sign of slowing in the short term.

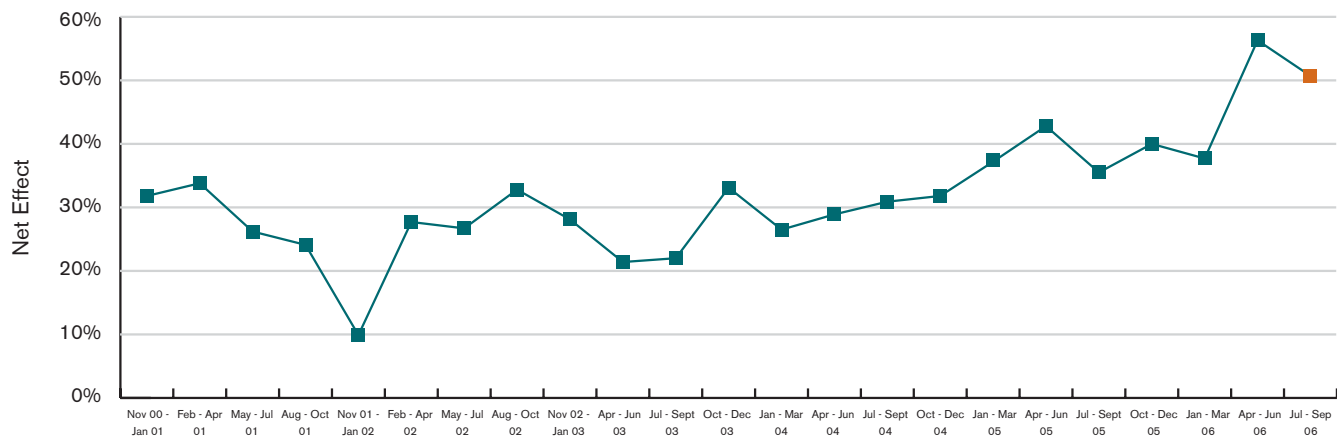
Flow-on effects from the resources sector are evident across all sectors. The highest level of sentiment has been recorded by the professional services and construction/property/engineering sectors. No employer in either sector anticipates a decrease in staff numbers over the July – September 06 quarter.

With a current net effect of +66.2% the results for the construction/property/engineering sector, while 1.0pp lower than last quarter, is 13.5pp higher than 12 months ago. Contributing to this high level of employer sentiment is a strong property market. The federal budget and a recent rise in interest rates do not appear to have affected the property market. A sign of the strength in the housing market, along

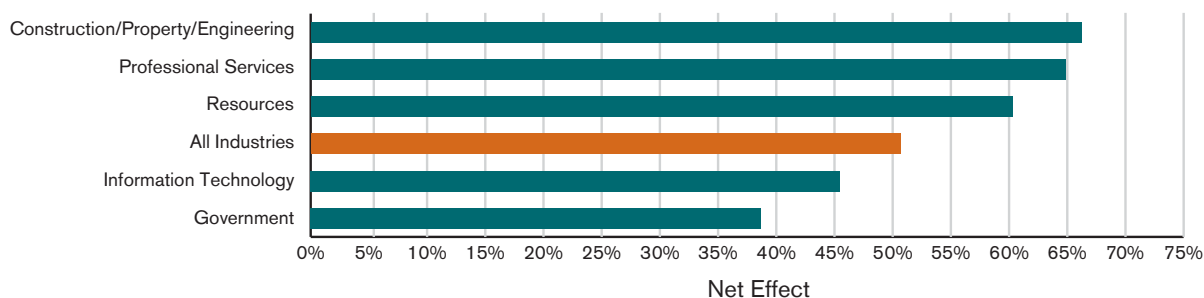
with the obvious price increase, is the number of days to sell. This has fallen to 18 days for the March quarter, compared to 48 days a year ago.

While employer sentiment softened slightly across most sectors, the government sector is more optimistic for the July – September 06 quarter. Up 3.4pp, a net positive 38.7% of employers are expecting to increase staffing levels for the quarter. This growth is expected to be fueled over the coming months by infrastructure investment and the implementation of a shared delivery model.

WA Permanent Employment Expectations (November 2000 - September 2006)



WA Permanent Employment Expectations (July - September 2006):  
By Industry



<sup>iv</sup> Real Estate Institute of Western Australia

# Contracting/Temporary Workforce

- Contracting/temporary workforce increases for the April – June 06 quarter, up 0.8pp.
- WA contracting/temporary workforce declines slightly but still strongest nationally, net +30.7%

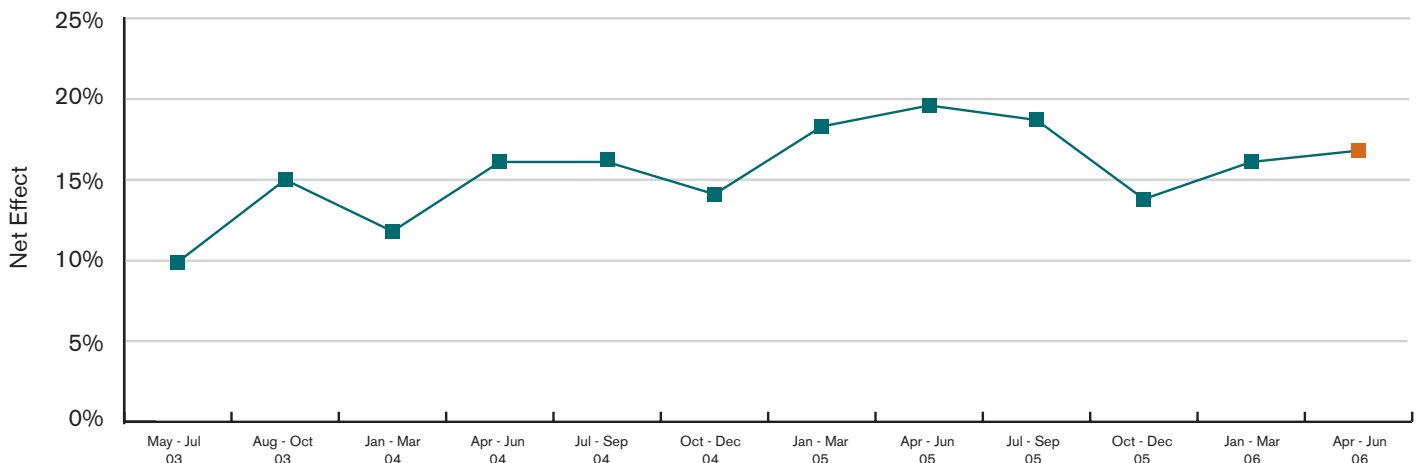
Of the employers surveyed nationally, 24.8% indicated that they had increased their contracting/temporary workforce over the April – June 06 quarter. This compares with 7.9% of respondents who reduced their contracting/temporary workforce. Most

employers (67.3%) have held their contracting/temporary workforces steady. The net effect of +16.8% is up 0.8pp from the January – March 06 quarter.

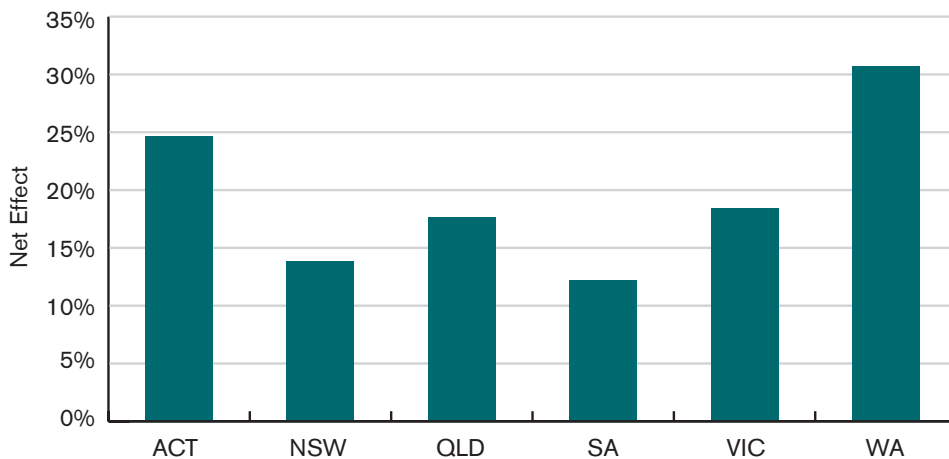
From a national perspective, decreases in contracting/temporary recruitment in Western Australia and Queensland have been offset by increases in other states to result in an overall increase in the contracting/temporary workforce.

Western Australia, despite a decrease on last quarter, has recorded the strongest results for contracting/temporary activities with a net effect of +30.7%. Only 4.0% indicated a decrease in contracting/temporary numbers over the last three months. The largest increase from the previous quarter was recorded by Victoria, up 3.4pp to a current net effect of +18.4%.

National Contracting and Temporary Employment (May 2003 - June 2006)



Contracting and Temporary Employment (April - June 2006):  
By State/Territory



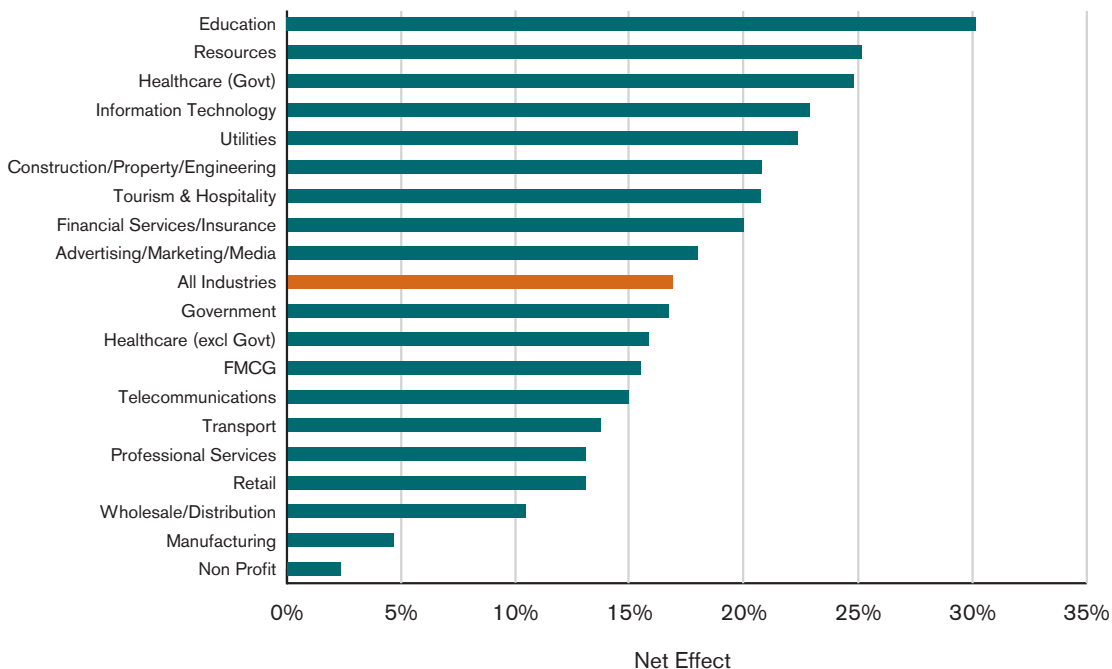
# Contracting/Temporary Workforce

Analysing by sector the most positive results have been recorded by the education sector. With a net positive 30.1% of respondents stating that they had increased their contracting/temporary workforce this represents a positive movement of 6.0pp on last quarter. This is the highest increase recorded by this sector in over three years.

Whilst down 10.2pp, the contracting/temporary workforce remains strong in the resources sector. The reduction in contracting and temporary staffing can be attributed, to some extent, to a change in attitude by the sector. Given the restricted talent pool in resource related jobs, many organisations are moving to permanent

staff where possible to retain valuable employees. A strong development pipeline has also allowed organisations to employ and shift staff around projects, rather than employing staff for current operations or on a single project basis. This also applies to the technical engineering consultancies working in the resources area.

National Contracting and Temporary Employment (April - June 2006):  
By Industry



# Your Points of Contact

## **National**

Anne Hatton, CEO, Australia/New Zealand  
t (02) 8233 2222  
anne.hatton@hudson.com

## **ACT**

Andrew Williams, General Manager ACT  
t (02) 6229 1555  
andrew.williams@hudson.com

## **NSW**

Chris Mead, General Manager NSW  
t (02) 8233 2222  
chris.mead@hudson.com

## **NT**

Elaine Charlton, Consultant NT  
t (08) 8941 5200  
elaine.charlton@hudson.com

## **QLD**

Gina McLellan, General Manager QLD  
t (07) 3258 8333  
gina.mclellan@hudson.com

## **SA**

Phil Morton, General Manager SA  
t (08) 8223 8800  
phil.morton@hudson.com

## **VIC**

Andrew Staite, General Manager VIC  
t (03) 9623 6666  
andrew.staite@hudson.com

## **WA**

Neville Andrews, General Manager WA  
t (08) 9323 0222  
neville.andrews@hudson.com

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Hudson Global Resources (Aust) Pty Limited  
Hudson Global Resources (NZ) Limited

Adelaide (61 8) 8223 8800  
Auckland (64 9) 367 9000  
Auckland South (64 9) 526 0666  
Baulkham Hills (61 2) 8233 2780  
Brisbane (61 7) 3258 8333  
Canberra (61 2) 6229 1555  
Christchurch (64 3) 379 9000  
Darwin (61 8) 8941 5200  
Melbourne (61 3) 9623 6666  
Mount Waverley (61 3) 9535 8222  
Newcastle (61 2) 4927 2220  
North Sydney (61 2) 8233 4333  
Parramatta (61 2) 8836 0222  
Perth (61 8) 9323 0222  
Sydney (61 2) 8233 2222  
Wellington (64 4) 473 4073

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