

The Bayt.com Middle East Job Index Survey

February 2016



Section 1

PROJECT BACKGROUND

Objectives

- To gauge perceptions of job availability and hiring.
- To identify trends in the Middle East and North Africa job market.
- To provide an understanding of the required key skill sets and qualifications.

Calculation of Indices and Benchmarking

- The indices which concentrate on measuring the job market are the :
 - Job Index (JI)
 - Hiring Expectancy Index (HEI)
- The indices aim to measure the potential opportunities that are present in the market.
- The Job Index is composed of the following two questions:
 - Question 1 - Will you be hiring in the next 3 months either for your organization or for your clients if you are in the recruitment field or an HR consultant?
 - Question 2 - With regard to your future expectations, do you think you will be hiring in a year's time from now either for your organization or for your clients if you are in the recruitment field or an HR consultant? (This question also measures the HEI).

Calculation of Indices and Benchmarking

- The index is calculated according to the following formula:

$$\text{Index Value} = (\text{Current period value} / \text{Base period value}) * 100$$

- Current period's value for each question is calculated as:

$$(((\text{Number of optimistic answers} - \text{Number of pessimistic answers}) / \text{Achieved sample}) * 100) + 100$$

- Current period values for each question are summed up to obtain current period's value for the overall index.
- The current period's value calculated for October 2009 is fixed as the base period value.
- The base period of the index is set as October 2009 and the value of the index at this period is 100.
- The index has a point of scale ranging from 0 to 200.
- The JI is calculated from Question 1 and Question 2.
- The HEI is calculated using only Question 2.
- JI and HEI are calculated separately for each country.

Key findings

- Overall, the Job Index exhibits a **negative movement** by three points since last wave (June 2015).
- The Hiring Expectancy Index for the MENA region also presents a decrease of an average of three points since June 2015. It has decreased by six points in KSA, by five points in Qatar and by four points in Egypt.
- Focusing on future hiring expectations in the next 3 months, 6 in 10 working respondents claim that their companies intend to hire new employees. Intention to hire in the next 3 months is somewhat lower in Levant (56%, Lebanon at 56%, Jordan at 55%), as compared to GCC (61%) and North Africa (63%).
- Amongst those companies which plan to hire in the next 3 months, 43% state that they will be hiring for a maximum of 5 jobs.
- The majority of companies hiring in the next 3 months are filling junior and mid-level positions.

Key findings

- A degree in Business Management (27%) followed by an Engineering degree (25%), a Commerce degree (23%) and Administrative qualifications (20%) are the most sought-after academic qualifications when looking for a candidate.
- Good communication skills in Arabic and English (65%) is by far the top skill that employers look for in a candidate. Being a team player follows at 48%.
- 4 in 10 state that they are looking for candidates with good managerial skills, while 3 in 10 are looking for those with computer skills and experience in sales and marketing.
- Half of working respondents claim that their company has hired new employees in the last 3 months; 67% in the last 6 months.
- 43% believe that their country of residence is more attractive as a job market when compared to other MENA countries, while 29% claim the opposite. This belief is much higher amongst GCC residents (58%), as compared to those living in North Africa (26%) and in Levant (23%).

Key findings

- 46% of working respondents believe that their industry is more attractive as a potential employer in comparison to other industries. A higher proportion of GCC residents (50%) state that as compared to those living in North Africa (42%) and Levant (40%).
- Construction (35%) and Banking/ Finance (33%) emerge as the industries that attract top talent. Banking/ Finance is more attractive amongst respondents in Levant (44% vs. 31% for GCC and North Africa).

Section 2

RESEARCH METHODOLOGY

Sample Definition

Age and Gender:

Males and females

Aged 18+

Nationalities:

GCC Arabs, North Africans, Levantines, Western Expats, Asians

Country of Residence

GCC: UAE, KSA, Kuwait^(*), Oman^(*), Qatar, Bahrain^(**)

Levant: Lebanon^(*), Syria^(**), Jordan

North Africa: Egypt, Morocco^(*), Algeria^(*), Tunisia^(**)

Asia: Pakistan^(**)

*Low sample for current wave

**Very low sample for current wave

Data Collection

All data was collected online. Fieldwork was done between December 8th, 2015 and January 21st 2016. The total number of successful online interviews achieved was 1,232. Of these, 1,044 were of working status.

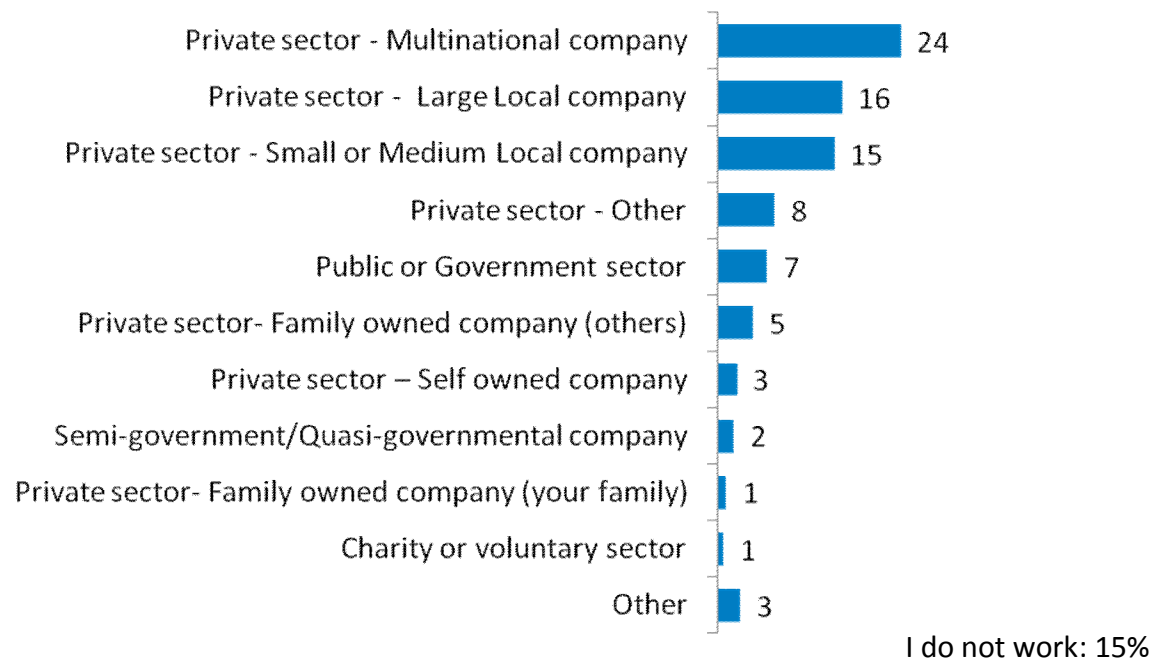
Section 3

RESPONDENT PROFILE

Sector of work

Q. In which of the following sectors do you work?

- 7 in 10 respondents work in the private sector, with 24% working in a multinational company.
- 15% do not currently work.



Sector of work – By country

Q. In which of the following sectors do you work?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan
Base: All	165	187	94	124	27	51	58	6	123
Private sector - Multinational company	28	27	28	39	22	22	22	-	14
Private sector - Large Local company	24	13	32	12	7	35	9	-	7
Private sector - Small or Medium Local company	13	20	14	17	19	12	17	-	15
Private sector - Other	9	7	5	6	7	6	7	17	8
Public or Government sector	2	5	4	5	11	10	2	-	13
Private sector - Family owned company (others)	8	2	3	2	4	2	17	17	7
Private sector - Self owned company	2	3	2	2	11	-	2	17	2
Semi-government/Quasi-governmental company	-	3	2	6	-	4	-	-	1
Private sector - Family owned company (your family)	2	-	-	1	7	-	-	-	2
Charity or voluntary sector	-	-	1	-	-	-	2	-	4
Other	2	4	3	1	-	-	5	-	4
I do not work	10	16	5	10	11	10	17	50	22

All figures are %'s

(*)Small base (**)Very small base

Base: All by country

Sector of work – By country

Q. In which of the following sectors do you work?

	North Africa				Asia
	Egypt	Morocco (*)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: All	280	30	66	9	12
Private sector - Multinational company	24	7	14	11	17
Private sector - Large Local company	18	7	6	-	25
Private sector - Small or Medium Local company	16	10	9	11	8
Private sector - Other	9	3	6	11	8
Public or Government sector	4	-	30	11	17
Private sector - Family owned company (others)	5	-	-	-	-
Private sector - Self owned company	4	-	-	-	-
Semi-government/Quasi-governmental company	1	-	6	22	-
Private sector - Family owned company (your family)	1	3	2	-	-
Charity or voluntary sector	-	7	-	-	-
Other	3	3	3	11	8
I do not work	14	60	24	22	17

Base: All by country

All figures are %'s

(*)Small base (**)Very small base

Level of seniority at work

Q. Which of the following best describes your level of seniority at work?

- 22% of working respondents are junior managers/ team leaders, while 20% are directors or senior managers.



Base: Working (1,044)

All figures are %'s

Level of seniority at work – By country

Q. Which of the following best describes your level of seniority at work?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan (*)
Base: Working	149	158	89	111	24	46	48	3	96
CEO/ President/ Chairman/ Owner/Self employed	6	6	8	4	4	2	2	67	11
Director or Senior Manager	22	12	17	15	8	15	31	33	19
Professional (i.e. requiring specific professional qualifications)	17	16	17	19	8	15	13	-	11
Middle manager	19	22	12	20	21	33	21	-	11
Junior manager/ team leader	26	23	22	21	42	15	19	-	25
Executive with no managerial responsibilities	9	13	11	14	4	15	10	-	14
Clerical	2	8	12	8	13	4	4	-	8

Base: Working

All figures are %'s

(*)Small base (**)Very small base

Level of seniority at work – By country

Q. Which of the following best describes your level of seniority at work?

	North Africa				Asia
	Egypt	Morocco (**)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: Working	241	12	50	7	10
CEO/ President/ Chairman/ Owner/Self employed	14	17	12	-	10
Director or Senior Manager	28	8	16	29	10
Professional (i.e. requiring specific professional qualifications)	12	17	10	14	20
Middle manager	14	8	10	14	10
Junior manager/ team leader	19	8	24	29	30
Executive with no managerial responsibilities	9	25	12	-	-
Clerical	4	17	16	14	20

Base: Working

All figures are %'s

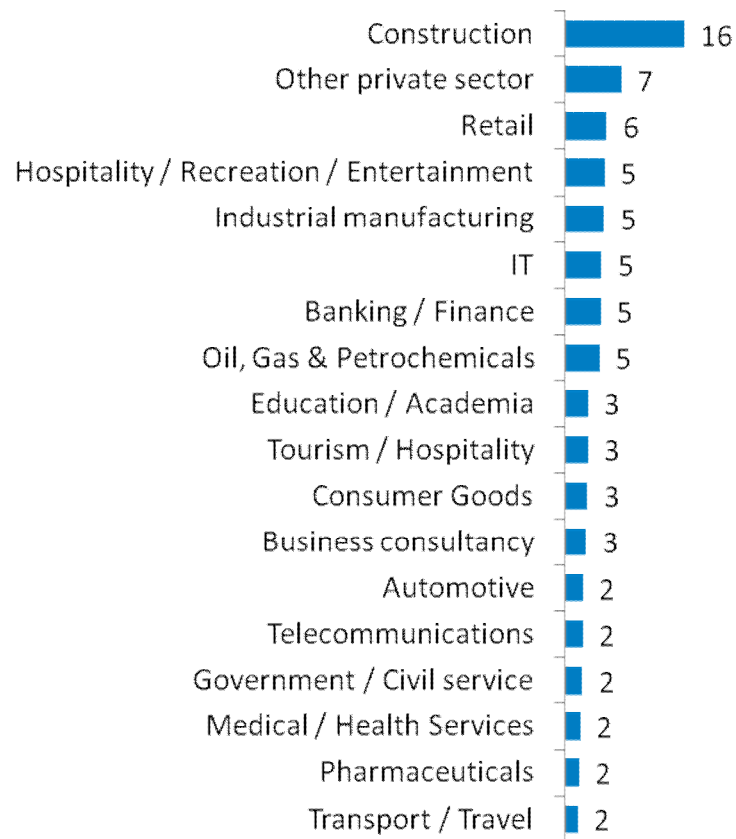
(*)Small base (**)Very small base

Industry of work

Q. And in which of the following industries do you work?

- 16% of working respondents are employed in the construction industry.

Industry currently working in*



Industry of work – By country

Q. And in which of the following industries do you work?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan (*)
Base: Working	149	158	89	111	24	46	48	3	96
Construction	28	17	15	30	8	17	6	100	1
Other private sector	8	4	2	6	4	4	-	-	9
Retail	6	7	10	6	13	2	8	-	5
Hospitality / Recreation / Entertainment	1	9	10	5	4	9	4	-	2
Industrial manufacturing	7	4	2	3	-	2	10	-	8
IT	3	7	8	5	13	9	6	-	5
Banking / Finance	2	5	3	4	-	15	2	-	7
Oil, Gas & Petrochemicals	2	4	7	10	-	7	8	-	1
Education / Academia	1	2	2	-	13	4	13	-	5
Tourism / Hospitality	2	3	3	4	8	2	4	-	4
Consumer Goods	3	1	3	1	8	4	2	-	2
Business consultancy	3	5	3	1	-	-	4	-	3
Automotive	5	3	2	-	-	4	-	-	3
Telecommunications	5	1	-	1	8	-	-	-	-
Government / Civil service	1	3	-	2	-	-	2	-	6
Medical / Health Services	3	2	6	1	4	-	2	-	1
Pharmaceuticals	1	1	-	-	4	2	-	-	3
Transport / Travel	1	4	3	1	-	-	-	-	1
Electronics	2	3	1	1	-	-	2	-	-

Base: Working *Showing only top industries (higher than 1%)

All figures are %'s (*)Small base (**)Very small base

Industry of work – By country

Q. And in which of the following industries do you work?

	North Africa				Asia
	Egypt	Morocco (**)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: Working	241	12	50	7	10
Construction	11	-	10	-	20
Other private sector	12	33	8	-	-
Retail	3	8	-	-	-
Hospitality / Recreation / Entertainment	5	-	-	14	10
Industrial manufacturing	4	8	6	14	20
IT	2	8	2	14	-
Banking / Finance	4	8	8	29	10
Oil, Gas & Petrochemicals	5	-	-	-	10
Education / Academia	2	-	8	-	-
Tourism / Hospitality	3	-	2	-	-
Consumer Goods	5	-	2	-	-
Business consultancy	2	-	6	14	-
Automotive	2	-	4	-	-
Telecommunications	5	-	-	-	-
Government / Civil service	1	-	12	-	-
Medical / Health Services	2	-	-	-	10
Pharmaceuticals	5	-	2	-	-
Transport / Travel	2	8	-	-	-
Electronics	2	-	-	-	10

Base: Working

*Showing only top industries (higher than 1%)

All figures are %'s

(*)Small base (**)Very small base

Section 4

PAST AND CURRENT PERIOD VALUES

Current Hiring Values

Year	Period	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Pakistan	Qatar	Saudi Arabia	Syria	Tunisia	UAE
2009	Oct 2009	119	124	109	118	117	120	128	113	122	114	122	124	120	123	114
2010	Jan 2010	120	120	124	119	118	122	124	122	123	120	116	125	121	123	112
	Apr 2010	121	125	115	118	114	115	128	121	118	125	130	127	120	114	117
	Jul 2010	120	130	132	117	113	125	125	121	126	125	123	120	116	118	117
	Oct 2010	119	126	126	119	116	120	115	125	130	117	117	123	122	112	114
2011	Jan 2011	121	121	120	119	121	118	120	119	122	117	123	126	120	114	119
	Apr 2011	121	123	117	117	115	122	130	117	134	125	129	127	118	120	120
	Jul 2011	121	124	115	117	119	116	117	112	130	128	123	125	126	124	117
	Oct 2011	119	126	94	115	117	119	122	126	118	118	116	126	116	112	114
2012	Jan 2012	119	122	123	116	116	118	120	116	124	122	125	124	110	116	118
	Aug 2012	119	116	121	115	118	119	114	118	117	121	127	125	101	122	118
2013	Jan 2013	122	126	123	117	124	123	123	120	125	121	121	130	108	115	120
	Aug 2013	120	119	105	118	119	122	113	111	122	123	124	127	105	125	122
2014	Jan 2014	124	122	126	118	121	134	117	121	137	119	129	131	116	112	124
	Aug 2014	125	123	114	121	127	124	123	123	122	126	125	132	109	130	128
2015	Jan 2015	123	122	129	120	120	122	118	121	127	127	125	124	115	116	123
	Jun 2015	127	123	117	129	120	127	121	113	137	131	133	131	50	133	126
	Dec 2015	123	125	133	125	121	122	117	121	122	145	118	123	117	150	120

Future Hiring Values

Year	Period	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Pakistan	Qatar	Saudi Arabia	Syria	Tunisia	UAE
2009	Oct 2009	130	132	129	129	129	131	131	127	135	122	130	133	131	129	126
2010	Jan 2010	130	131	127	128	130	129	130	129	130	120	129	134	131	131	123
	Apr 2010	131	133	138	128	128	129	132	127	135	135	134	136	134	128	129
	Jul 2010	120	130	132	117	113	125	125	121	126	125	123	120	116	118	117
	Oct 2010	119	126	126	119	116	120	115	125	130	117	117	123	122	112	114
2011	Jan 2011	129	130	130	128	129	129	128	124	129	141	132	133	132	127	128
	Apr 2011	130	130	129	128	127	130	134	128	139	136	133	133	131	128	130
	Jul 2011	130	131	130	127	132	125	135	126	132	122	130	132	130	133	128
	Oct 2011	128	134	117	125	129	126	125	126	124	125	126	135	123	124	124
2012	Jan 2012	128	131	133	125	126	126	130	126	130	127	133	131	126	126	126
	Aug 2012	128	126	132	127	128	129	130	121	115	128	132	132	117	127	128
2013	Jan 2013	129	131	128	126	132	133	127	128	130	127	128	135	122	131	129
	Aug 2013	129	134	115	127	127	134	123	122	129	131	132	133	124	131	129
2014	Jan 2014	130	130	123	125	132	134	123	127	144	131	133	135	126	123	129
	Aug 2014	131	126	118	129	132	127	127	128	134	131	130	138	116	135	133
2015	Jan 2015	129	126	126	131	127	130	128	132	130	131	128	130	121	118	128
	Jun 2015	133	134	117	134	132	133	133	133	142	131	135	135	50	133	130
	Dec 2015	130	133	129	129	131	133	126	146	130	140	128	127	133	136	131

Current Hiring + Future Hiring Values

Year	Period	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Pakistan	Qatar	Saudi Arabia	Syria	Tunisia	UAE
2009	Oct 2009	249	257	239	247	246	251	259	240	258	236	252	257	251	252	241
2010	Jan 2010	250	252	251	247	248	251	254	251	253	240	245	259	252	254	235
	Apr 2010	252	258	253	246	242	243	260	249	253	260	263	264	254	242	246
	Jul 2010	241	259	264	235	227	249	250	243	253	249	246	240	231	237	234
	Oct 2010	239	252	251	238	231	241	231	250	260	233	233	246	245	224	228
2011	Jan 2011	250	251	250	247	250	246	248	243	251	259	255	259	252	241	247
	Apr 2011	251	253	247	246	242	253	264	245	273	261	262	260	249	248	250
	Jul 2011	250	254	244	244	251	241	252	238	262	250	253	257	256	258	245
	Oct 2011	246	260	211	240	246	245	247	251	242	243	242	261	239	236	238
2012	Jan 2012	247	253	256	241	242	244	249	243	254	249	257	255	236	242	244
	Aug 2012	247	242	253	242	245	248	245	239	231	249	259	257	218	248	246
2013	Jan 2013	251	257	252	243	256	255	249	248	256	248	249	265	230	246	249
	Aug 2013	249	253	220	244	246	257	236	232	251	254	256	260	229	256	251
2014	Jan 2014	254	252	249	243	253	268	239	248	281	250	263	266	243	235	253
	Aug 2014	256	249	232	250	258	251	250	251	255	257	255	270	225	265	261
2015	Jan 2015	253	248	255	251	248	252	246	253	257	259	253	254	235	234	250
	Jun 2015	260	256	233	263	253	260	254	246	279	263	267	266	100	267	257
	Dec 2015	253	258	263	254	252	254	243	267	252	285	247	251	250	286	251

Section 5

INDICES

Hiring Expectancy Index

- The Hiring Expectancy Index (HEI) for the MENA region presents a 3 point decrease as compared to June 2015.
- Notably, it has decreased by six points in KSA, by five points in Qatar and by four points in Egypt since June 2015 .

Year	Period	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Pakistan	Qatar	Saudi Arabia	Syria	Tunisia	UAE
2010	Jan 2010	100	101	102	101	100	102	101	99	104	102	100	99	100	98	103
	Apr 2010	99	100	94	101	101	102	100	100	100	90	97	98	98	100	98
	Jul 2010	108	102	98	110	114	105	105	105	107	98	105	111	113	109	108
	Oct 2010	109	105	103	108	112	109	114	102	104	105	111	108	107	115	111
2011	Jan 2011	100	102	100	101	100	102	103	103	105	86	99	100	99	102	99
	Apr 2011	100	102	100	101	101	101	98	99	98	90	97	100	100	101	98
	Jul 2011	100	101	100	101	98	105	97	101	102	100	100	101	101	97	99
	Oct 2011	102	99	111	103	100	104	105	101	109	98	103	99	106	104	102
2012	Jan 2012	101	101	97	103	102	104	101	101	104	96	98	102	104	102	100
	Aug 2012	101	105	98	101	101	102	101	105	118	95	98	101	112	102	99
2013	Jan 2013	100	101	101	102	98	99	104	99	104	96	102	99	108	98	98
	Aug 2013	100	99	112	102	102	98	107	105	105	93	98	101	106	98	98
2014	Jan 2014	100	101	105	103	98	98	107	100	94	93	97	99	104	105	98
	Aug 2014	101	95	91	100	102	97	97	101	99	107	100	103	89	105	105
2015	Jan 2015	100	95	97	102	98	99	98	103	96	108	99	97	92	92	101
	Jun 2015	103	101	90	104	102	101	102	105	105	108	104	101	38	104	103
	Dec 2015	100	101	100	100	101	101	96	115	96	115	99	95	102	105	104

- At an overall level, the Job Index exhibits a negative movement by three points since June 2015.

Year	Period	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Pakistan	Qatar	Saudi Arabia	Syria	Tunisia	UAE
2010	Jan 2010	100	98	105	100	101	100	98	105	98	102	97	101	100	101	98
	Apr 2010	101	100	106	100	98	97	100	103	98	110	105	102	101	96	102
	Jul 2010	97	101	111	95	92	99	97	101	98	106	98	93	92	94	97
	Oct 2010	96	98	105	96	94	96	89	104	101	99	93	96	98	89	94
2011	Jan 2011	101	98	105	100	102	98	96	101	97	110	101	101	100	96	102
	Apr 2011	101	99	103	100	98	101	102	102	106	110	104	101	99	98	104
	Jul 2011	101	99	102	99	102	96	97	99	102	106	101	100	102	102	102
	Oct 2011	99	101	88	97	100	98	95	105	94	103	96	101	95	94	99
2012	Jan 2012	99	99	107	98	99	97	96	101	98	105	102	99	94	96	101
	Aug 2012	99	94	106	98	100	99	95	100	90	106	103	100	87	99	102
2013	Jan 2013	101	100	105	99	104	102	96	103	99	105	99	103	92	98	103
	Aug 2013	100	99	92	99	100	102	91	97	97	108	102	101	91	102	104
2014	Jan 2014	102	98	104	99	103	107	92	103	109	106	104	103	97	93	105
	Aug 2014	103	97	97	102	105	100	97	105	99	109	101	105	90	105	108
2015	Jan 2015	102	97	107	102	101	100	95	105	100	110	101	99	94	93	104
	Jun 2015	105	100	98	107	103	103	98	102	108	111	106	103	40	106	107
	Dec 2015	102	101	110	103	102	101	94	111	98	121	98	97	100	114	104

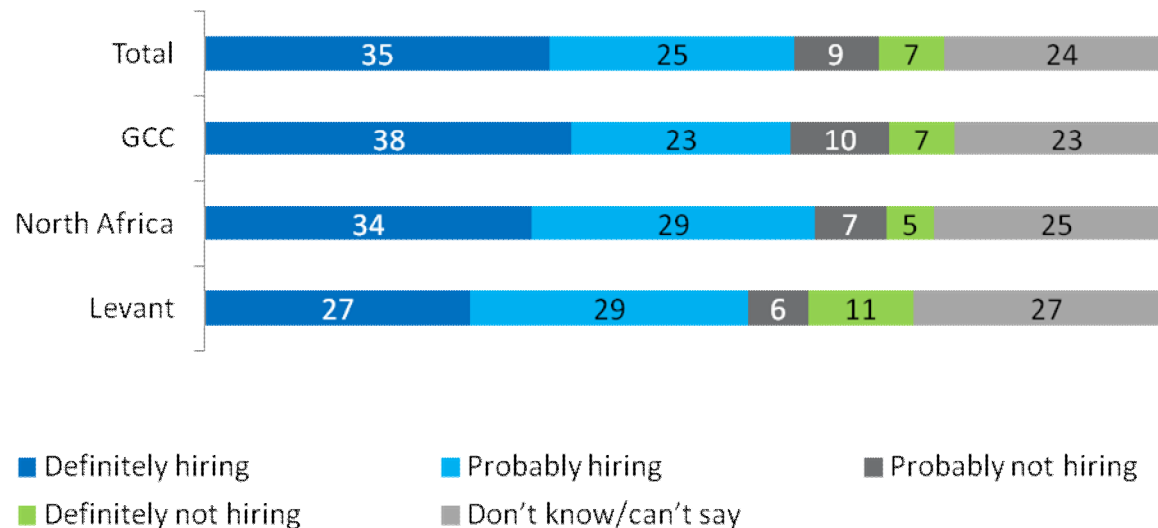
Section 6

RESEARCH FINDINGS

Hiring in next 3 months – By area

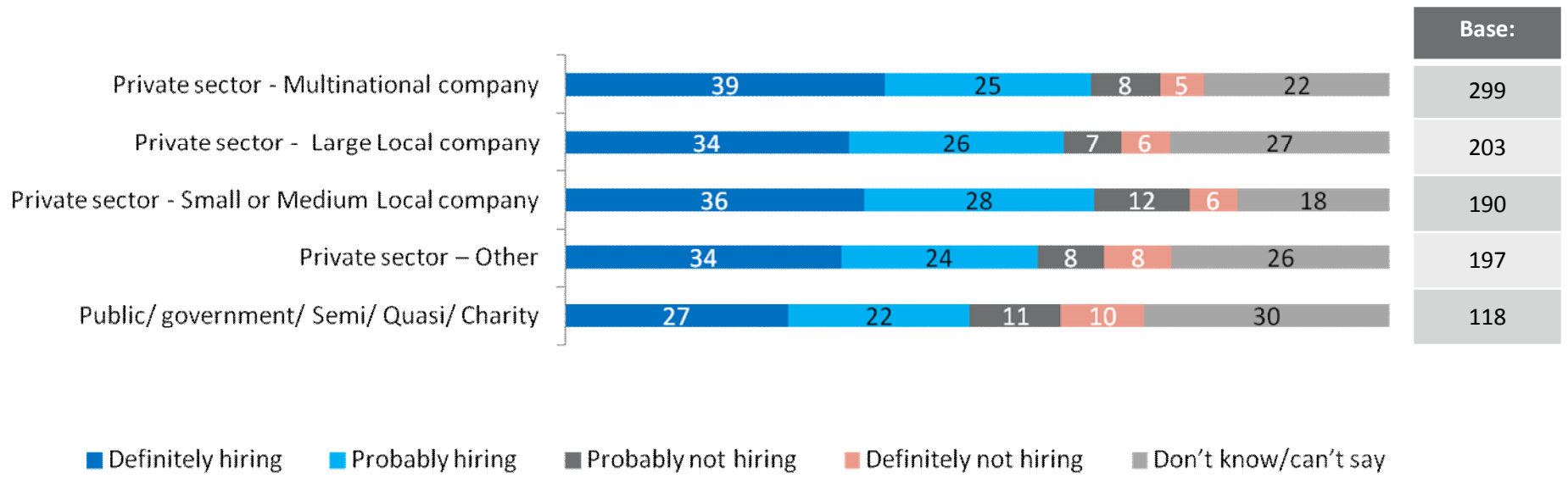
Q. Will you be hiring in the next 3 months either for your organization or for your clients if you are in the recruitment field or an HR consultant?

- At an overall level, 6 in 10 working respondents state they will be hiring in the next 3 months.
- Intention to hire in the next 3 months is somewhat lower in Levant (56%, Lebanon at 56%, Jordan at 55%), as compared to GCC (61%) and North Africa (63%).



Hiring in next 3 months – By sector

Q. Will you be hiring in the next 3 months either for your organization or for your clients if you are in the recruitment field or an HR consultant?



All figures are %'s Base: Working

Hiring in next 3 months – By country

Q. Will you be hiring in the next 3 months either for your organization or for your clients if you are in the recruitment field or an HR consultant?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan (*)
Base: Working	149	158	89	111	24	46	48	3	96
Definitely hiring	40	39	33	34	38	46	21	33	30
Probably hiring	21	21	27	23	38	17	35	33	25
Probably not hiring	7	12	6	14	4	15	6	-	6
Definitely not hiring	6	7	10	6	4	4	17	33	7
Don't know/can't say	26	22	25	23	17	17	21	-	31

	North Africa				Asia
	Egypt	Morocco (**)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: Working	241	12	50	7	10
Definitely hiring	34	42	24	71	80
Probably hiring	29	8	34	29	10
Probably not hiring	8	8	6	-	-
Definitely not hiring	6	-	2	-	-
Don't know/can't say	23	42	34	-	10

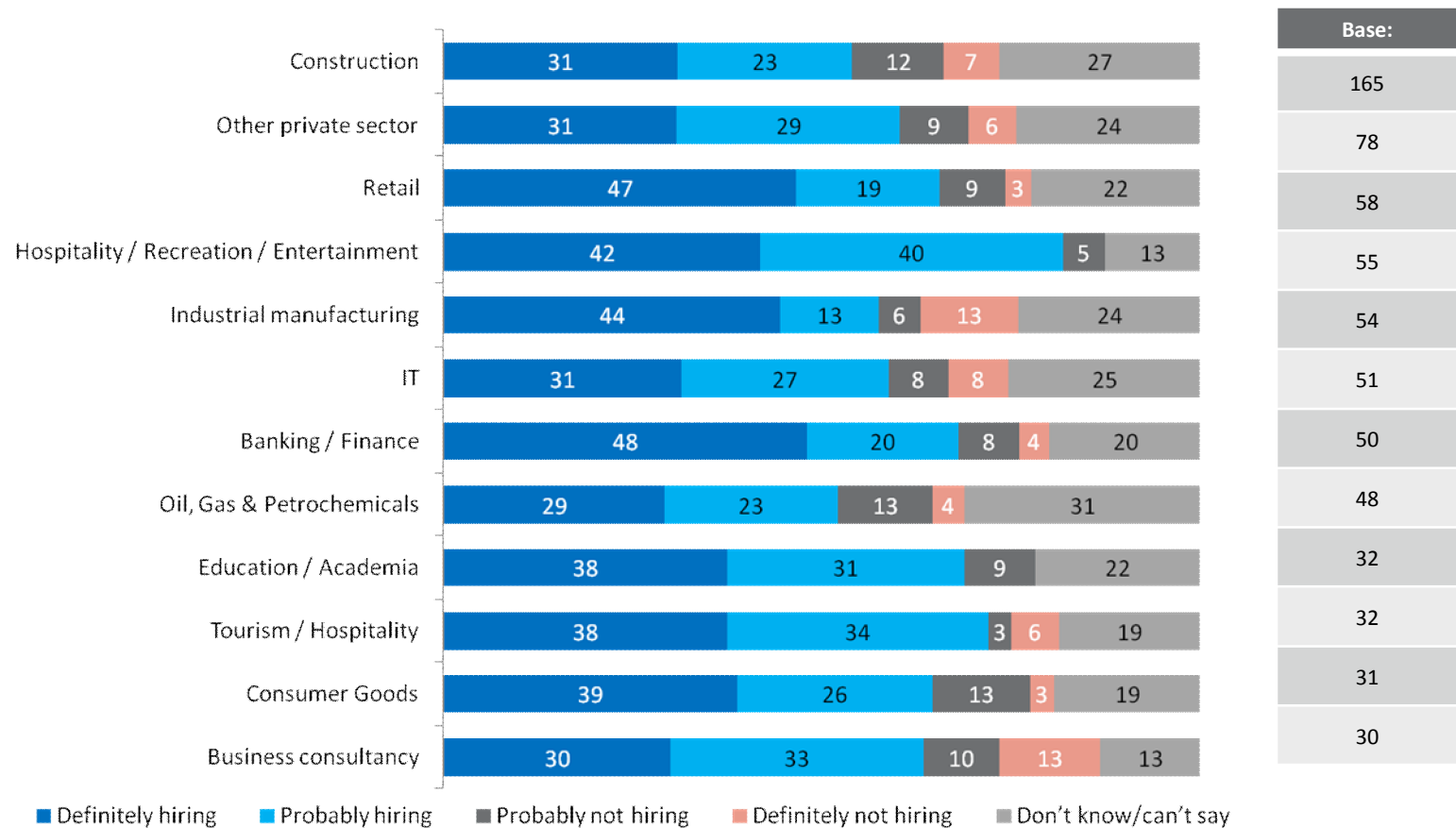
All figures are %'s

(*)Small base (**)Very small base

Hiring in next 3 months – By industry

Q. Will you be hiring in the next 3 months either for your organization or for your clients if you are in the recruitment field or an HR consultant?

- Organizations in the Hospitality/ Recreation/ Entertainment industry present the highest intention (82%) to hire.
- Construction (54%) and Oil, Gas & Petrochemicals (52%) have the lowest intention to hire in the next 3 months.

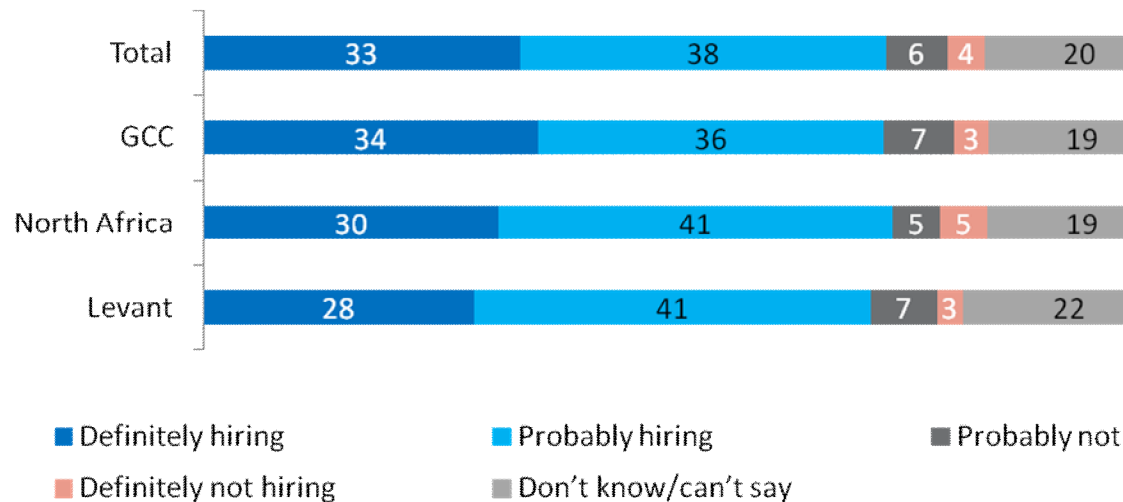


All figures are %'s

Hiring in a year's time – By area

Q. With regard to your future expectations, do you think you will be hiring in a year's time from now either for your organization or for your clients if you are in the recruitment field or an HR consultant?

- Focusing on future hiring expectations, 7 in 10 claim that they intend to hire in a year's time.
- No significant differences are observed per area of residence.



Base: Working (1,044), GCC (577), North Africa (310), Levant (147)

Hiring in a year's time – By country

Q. With regard to your future expectations, do you think you will be hiring in a year's time from now either for your organization or for your clients if you are in the recruitment field or an HR consultant?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan (*)
Base: Working	149	158	89	111	24	46	48	3	96
Definitely hiring	33	34	43	35	29	28	19	33	32
Probably hiring	32	39	30	35	46	41	46	33	39
Probably not hiring	5	8	7	10	8	7	8	-	6
Definitely not hiring	5	3	1	4	8	2	4	-	2
Don't know/can't say	26	16	19	16	8	22	23	33	21

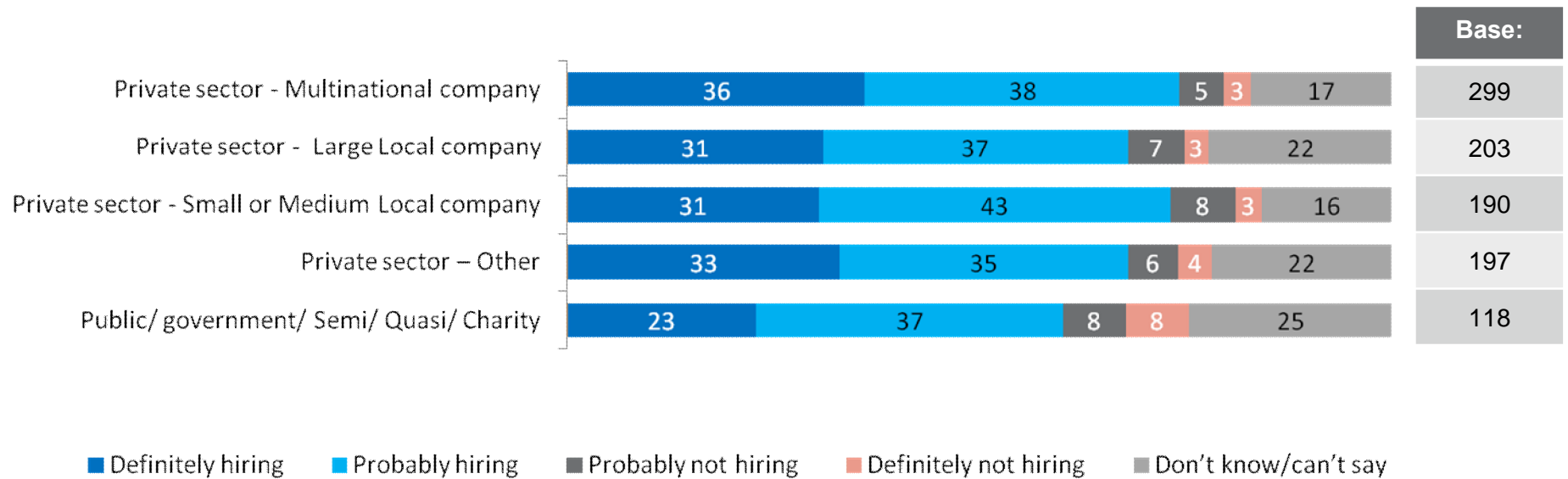
	North Africa				Asia
	Egypt	Morocco (**)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: Working	241	12	50	7	10
Definitely hiring	31	50	20	57	60
Probably hiring	39	42	50	29	20
Probably not hiring	5	-	2	14	-
Definitely not hiring	6	-	2	-	-
Don't know/can't say	19	8	26	-	20

All figures are %'s

(*)Small base (**)Very small base

Hiring in a year's time – By sector

Q. With regard to your future expectations, do you think you will be hiring in a year's time from now either for your organization or for your clients if you are in the recruitment field or an HR consultant?

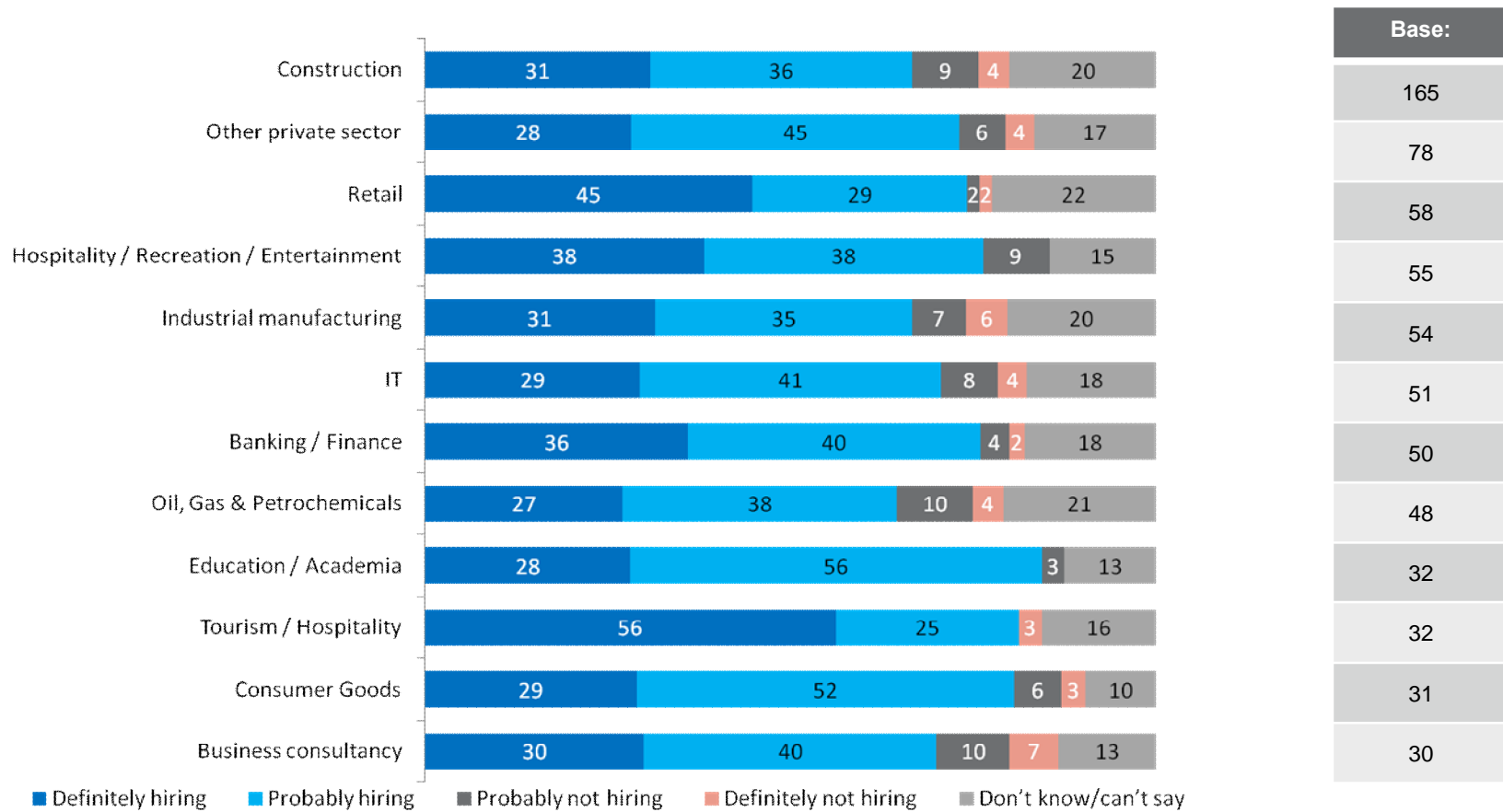


All figures are %'s

Hiring in a year's time – By industry

Q. With regard to your future expectations, do you think you will be hiring in a year's time from now either for your organization or for your clients if you are in the recruitment field or an HR

- Education/ Academia (84%), Tourism/ Hospitality and Consumer Goods (both at 81%) emerge as the industries with the highest intention to hire in a year's time.

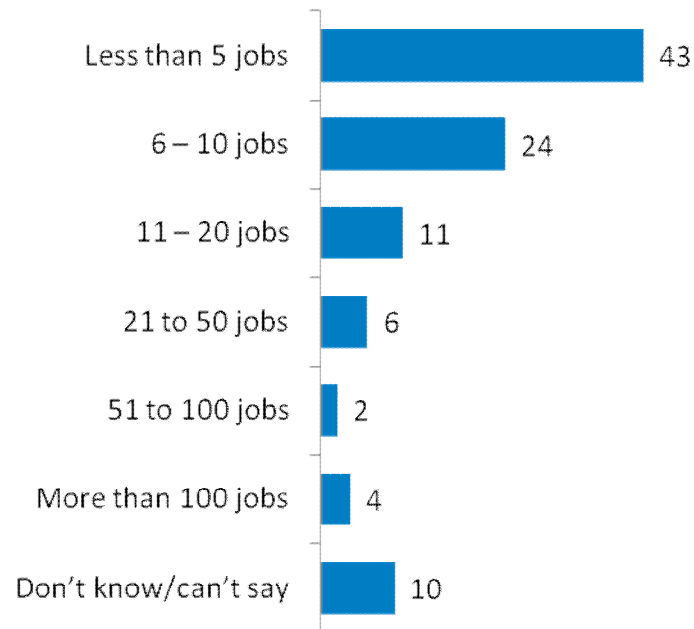


All figures are %'s

Approximate number of jobs hiring for

Q. Please indicate the approximate number of jobs you would be hiring for in the next 3 months.

- 43% of the companies that plan to hire in the next 3 months will be hiring for maximum 5 jobs.
- GCC seems to be hiring more jobs as compared to Levant and North Africa.



Base: Those hiring in next 3 months (632)

All figures are %'s

Approximate number of jobs hiring for – By country

Q. Please indicate the approximate number of jobs you would be hiring for in the next 3 months.

	GCC						Levant		
	KSA ^(*)	UAE ^(*)	Kuwait ^(*)	Qatar ^(*)	Bahrain ^(**)	Oman ^(**)	Lebanon ^(**)	Syria ^(**)	Jordan ^(*)
Base: Those hiring in next 3 months	90	94	53	63	18	29	27	2	53
Less than 5 jobs	38	33	43	25	61	38	63	100	60
6 – 10 jobs	21	24	23	25	22	24	26	-	25
11 – 20 jobs	16	12	11	14	6	14	-	-	6
21 to 50 jobs	4	5	9	10	6	14	4	-	4
51 to 100 jobs	3	4	4	5	-	-	-	-	-
More than 100 jobs	3	9	6	6	-	3	-	-	-
Don't know/can't say	14	13	4	14	6	7	7	-	6

	North Africa				Asia
	Egypt	Morocco ^(**)	Algeria ^(**)	Tunisia ^(**)	Pakistan ^(**)
Base: Those hiring in next 3 months	152	6	29	7	9
Less than 5 jobs	48	50	45	14	22
6 – 10 jobs	24	33	31	29	44
11 – 20 jobs	9	-	17	29	11
21 to 50 jobs	5	-	3	29	-
51 to 100 jobs	1	-	-	-	11
More than 100 jobs	3	17	-	-	11
Don't know/can't say	11	-	3	-	-

All figures are %'s

(*)Small base (**)Very small base

Approximate number of jobs hiring for – By sector

Q. Please indicate the approximate number of jobs you would be hiring for in the next 3 months.

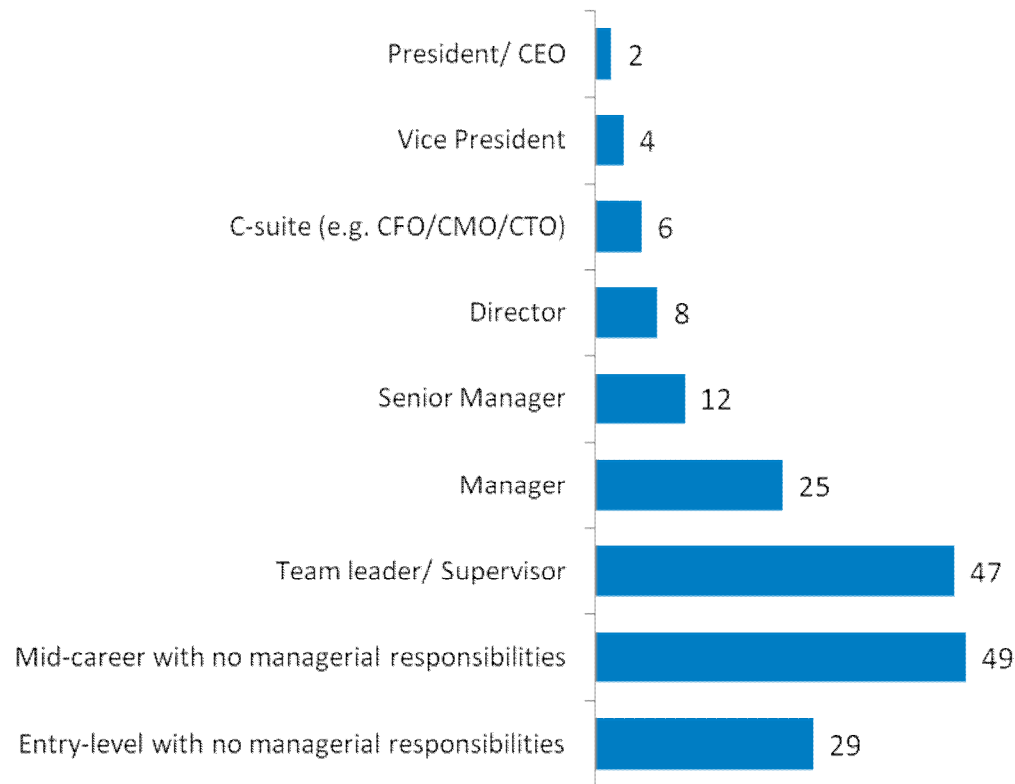
	Sector				
	Private sector - Multinational company	Private sector - Large Local company	Private sector - Small or Medium Local company	Private Sector Other	Public/Government/Semi/Quasi/Charity
Base: Those hiring in next 3 months	191	123	122	113	58
Less than 5 jobs	32	41	50	50	48
6 – 10 jobs	28	20	24	24	24
11 – 20 jobs	11	15	8	10	10
21 to 50 jobs	7	7	6	4	5
51 to 100 jobs	2	2	2	4	2
More than 100 jobs	6	5	2	1	3
Don't know/can't say	13	11	7	8	7

All figures are %'s

Positions hiring for

Q. Which of the following career levels/positions would you be hiring for in the next 3 months?

- The majority of companies will be hiring mid-career and junior positions. Only a few of them are hiring top-level candidates.



Positions hiring for – By country

Q. Which of the following career levels/positions would you be hiring for in the next 3 months?

	GCC						Levant		
	KSA (*)	UAE (*)	Kuwait (*)	Qatar (*)	Bahrain (**)	Oman (**)	Lebanon (**)	Syria (**)	Jordan (*)
Base: Those hiring in next 3 months	90	94	53	63	18	29	27	2	53
President/ CEO	2	3	-	2	6	-	-	-	4
Vice President	1	5	2	3	-	-	-	-	2
C-suite (e.g. CFO/CMO/CTO)	2	4	8	6	11	7	-	-	8
Director	6	10	6	11	11	-	4	-	2
Senior Manager	10	16	11	17	6	17	15	-	8
Manager	19	33	36	30	39	34	22	50	11
Team leader/ Supervisor	60	49	57	52	61	52	33	50	30
Mid-career with no managerial responsibilities	41	45	42	44	50	52	44	-	60
Entry-level with no managerial responsibilities	22	24	13	30	22	38	44	50	51

All figures are %'s

(*)Small base (**)Very small base

Positions hiring for – By country

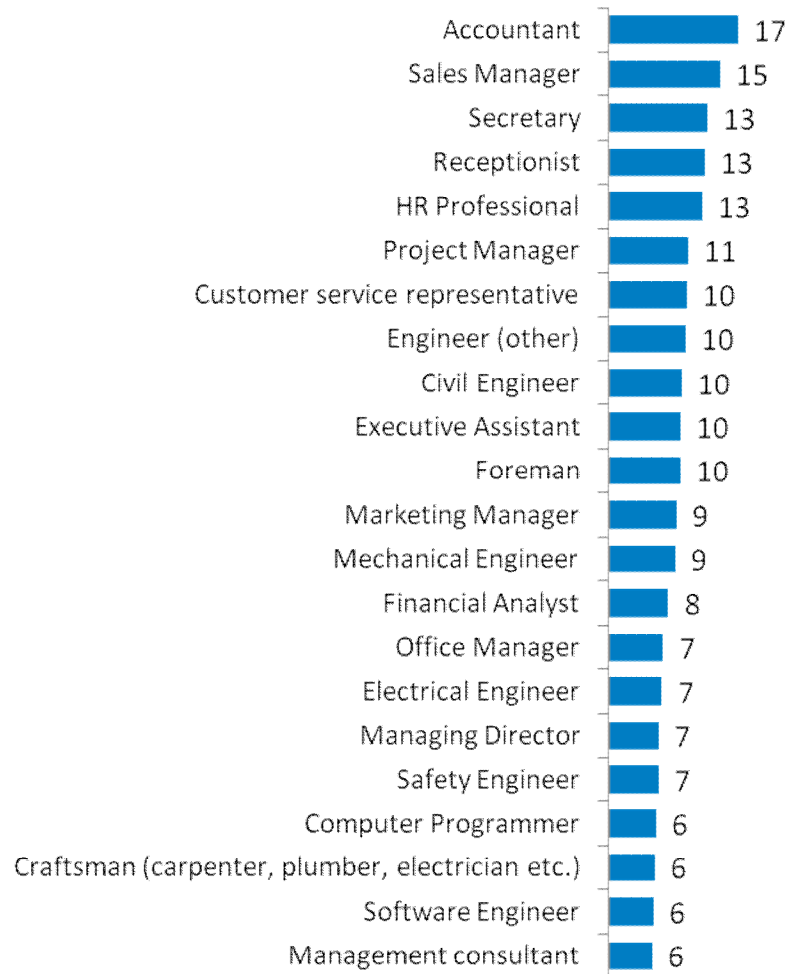
Q. Which of the following career levels/positions would you be hiring for in the next 3 months?

	North Africa				Asia
	Egypt	Morocco (**)	Algeria (**)	Tunisia (**)	Pakistan (**)
Base: Those hiring in next 3 months	152	6	29	7	9
President/ CEO	3	17	-	-	-
Vice President	4	33	14	14	11
C-suite (e.g. CFO/CMO/CTO)	7	17	17	-	-
Director	10	33	24	-	-
Senior Manager	10	33	3	14	11
Manager	20	-	14	43	33
Team leader/ Supervisor	41	33	45	43	33
Mid-career with no managerial responsibilities	60	50	38	71	22
Entry-level with no managerial responsibilities	29	17	21	71	22

All figures are %'s (*)Small base (**)Very small base

Specific roles hiring for

Q. Which of the following specific roles are you hiring for in the next 3 months?



All figures are %'s Base: Those hiring in next 3 months (632) *Showing only top roles (higher than 5%)

Specific roles hiring for – By country

Q. Which of the following specific roles are you hiring for in the next 3 months?

	GCC						Levant		
	KSA (*)	UAE (*)	Kuwait (*)	Qatar (*)	Bahrain (**)	Oman (**)	Lebanon (**)	Syria (**)	Jordan (*)
Base: Those hiring in next 3 months	90	94	53	63	18	29	27	2	53
Accountant	16	16	9	19	6	14	15	50	11
Sales Manager	11	23	17	19	28	3	15	-	9
Secretary	9	13	19	13	17	7	22	50	8
Receptionist	10	19	15	11	17	10	11	-	13
HR Professional	11	13	9	16	17	10	15	-	9
Project Manager	12	7	19	13	11	21	-	50	6
Customer service representative	8	14	17	14	11	14	11	-	4
Engineer (other)	11	14	6	19	-	10	7	-	8
Civil Engineer	9	16	9	13	6	10	-	50	2
Executive Assistant	9	14	9	11	28	14	-	-	8
Foreman	11	7	11	10	6	10	4	50	4
Marketing Manager	7	7	13	13	11	7	7	-	13
Mechanical Engineer	11	11	4	13	11	10	7	-	2
Financial Analyst	8	7	6	8	-	14	4	-	13
Office Manager	8	11	2	11	11	-	7	-	4
Electrical Engineer	13	5	4	11	6	10	4	-	-
Managing Director	4	6	6	5	-	3	7	-	4
Safety Engineer	8	6	11	11	-	3	4	-	-
Computer Programmer	8	6	6	3	11	10	4	-	2
Craftsman (carpenter, plumber, electrician etc.)	6	6	4	6	6	14	-	-	2
Software Engineer	3	9	4	5	6	7	7	-	4
Management consultant	4	7	2	10	6	3	7	-	6
Sales Director	6	10	4	2	-	-	-	-	8
Marketing Director	6	5	6	5	11	3	4	-	11
Branch Manager	4	5	11	5	-	7	7	-	6

All figures are %'s

(*)Small base (**)Very small base

*Showing only top roles (higher than 5%)

Specific roles hiring for – By country

Q. Which of the following specific roles are you hiring for in the next 3 months?

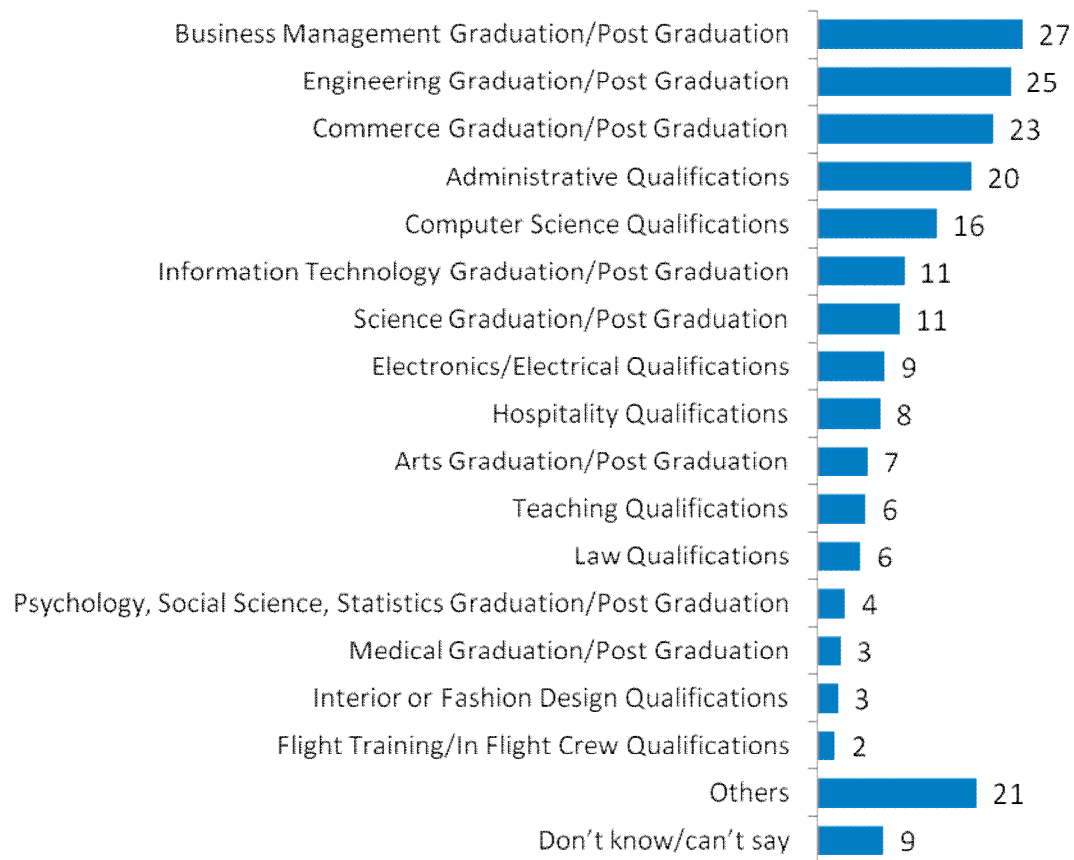
	North Africa				Asia
	Egypt	Morocco (**)	Algeria (**)	Tunisia (**)	Pakistan (**)
Base: Those hiring in next 3 months	152	6	29	7	9
Accountant	19	67	34	-	44
Sales Manager	13	-	10	29	11
Secretary	15	17	17	-	-
Receptionist	13	33	3	14	-
HR Professional	14	17	10	29	-
Project Manager	9	17	17	-	-
Customer service representative	10	-	3	-	11
Engineer (other)	10	-	7	-	11
Civil Engineer	10	-	14	-	11
Executive Assistant	7	17	3	14	11
Foreman	10	50	10	29	11
Marketing Manager	8	-	3	29	11
Mechanical Engineer	11	-	3	-	11
Financial Analyst	6	17	17	14	-
Office Manager	7	17	7	14	-
Electrical Engineer	7	-	10	-	-
Managing Director	9	33	14	14	-
Safety Engineer	7	-	7	14	-
Computer Programmer	5	17	10	29	11
Craftsman (carpenter, plumber, electrician etc.)	8	-	7	29	-
Software Engineer	7	17	7	14	-
Management consultant	3	33	14	14	-
Sales Director	7	33	3	-	-
Marketing Director	5	-	3	-	-
Branch Manager	5	-	3	-	22

All figures are %'s (*)Small base (**)Very small base *Showing only top roles (higher than 5%)

Educational and academic qualifications sought in candidate

Q. What are the educational and academic qualifications you emphasize on nowadays when looking for suitable candidates?

- Graduation/ Post Graduation degrees in Business Management (27%), followed by Engineering degrees (25%), Commerce degrees (23%) and Administrative qualifications (20%) are the most sought-after academic qualifications among employers in the MENA region.



Educational and academic qualifications – By country

Q. What are the educational and academic qualifications you emphasize on nowadays when looking for suitable candidates?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan (*)
Base: Working	149	158	89	111	24	46	48	3	96
Business Management Graduation/Post Graduation	23	27	25	35	17	24	44	33	26
Engineering Graduation/Post Graduation	30	27	26	35	4	28	25	100	9
Commerce Graduation/Post Graduation	19	27	19	23	33	28	8	-	9
Administrative Qualifications	15	18	21	24	17	17	25	-	28
Computer Science Qualifications	14	11	20	14	17	9	8	33	16
Information Technology Graduation/Post Graduation	11	15	19	11	8	15	10	-	9
Science Graduation/Post Graduation	8	17	7	11	8	13	13	-	5
Electronics/Electrical Qualifications	12	9	4	13	4	13	4	-	1
Hospitality Qualifications	4	13	11	12	8	2	13	-	5
Arts Graduation/Post Graduation	7	9	6	9	8	2	6	-	5
Teaching Qualifications	4	11	1	5	-	9	10	-	7
Law Qualifications	3	4	7	4	-	4	2	-	2
Psychology, Social Science, Statistics Graduation/Post Graduation	1	4	2	2	4	2	10	-	6
Medical Graduation/Post Graduation	1	4	2	4	4	4	2	-	-
Interior or Fashion Design Qualifications	3	6	2	3	-	-	4	-	2
Flight Training/In Flight Crew Qualifications	1	3	3	4	4	-	-	-	1
Others	19	18	15	18	21	26	17	-	38
Don't know/can't say	9	10	10	5	13	9	8	-	13

All figures are %'s

(*)Small base (**)Very small base

Educational and academic qualifications – By country

Q. What are the educational and academic qualifications you emphasize on nowadays when looking for suitable candidates?

	North Africa				Asia
	Egypt	Morocco (**)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: Working	241	12	50	7	10
Business Management Graduation/Post Graduation	24	33	28	71	30
Engineering Graduation/Post Graduation	27	8	16	43	-
Commerce Graduation/Post Graduation	32	33	12	57	40
Administrative Qualifications	17	33	28	57	10
Computer Science Qualifications	19	25	24	29	20
Information Technology Graduation/Post Graduation	9	17	12	-	-
Science Graduation/Post Graduation	10	17	20	14	10
Electronics/Electrical Qualifications	11	-	6	29	10
Hospitality Qualifications	5	-	10	43	20
Arts Graduation/Post Graduation	7	8	2	-	-
Teaching Qualifications	4	8	12	43	20
Law Qualifications	10	17	20	-	-
Psychology, Social Science, Statistics Graduation/Post Graduation	4	8	4	-	-
Medical Graduation/Post Graduation	5	-	4	-	-
Interior or Fashion Design Qualifications	2	-	-	14	-
Flight Training/In Flight Crew Qualifications	2	8	6	14	10
Others	21	33	22	29	10
Don't know/can't say	9	-	6	-	10

All figures are %'s

(*)Small base (**)Very small base

Educational and academic qualifications – By industry

Q. What are the educational and academic qualifications you emphasize on nowadays when looking for suitable candidates?

	Industry											
	Construction	Other private sector	Retail	Hospitality / Recreation / Entertainment	Industrial manufacturing	IT	Banking / Finance	Oil, Gas & Petrochemicals	Education / Academia	Tourism / Hospitality	Consumer Goods	Business consultancy
Base: Working	165	78	58	55	54	51	50	48	32	32	31	30
Business Management Graduation/Post Graduation	21	28	34	27	24	20	42	31	25	25	52	43
Engineering Graduation/Post Graduation	59	22	5	7	33	20	8	54	19	3	13	27
Commerce Graduation/Post Graduation	16	36	29	22	22	12	54	21	25	9	48	20
Administrative Qualifications	12	22	26	20	19	6	26	23	31	28	29	27
Computer Science Qualifications	10	13	17	7	13	43	14	13	22	22	26	17
Information Technology Graduation/Post Graduation	6	13	7	2	15	49	12	10	16	3	13	7
Science Graduation/Post Graduation	9	6	3	5	17	16	16	17	25	6	6	13
Electronics/Electrical Qualifications	16	17	3	7	11	4	2	21	3	3	10	3
Hospitality Qualifications	1	6	7	60	4	2	6	2	6	56	3	7
Arts Graduation/Post Graduation	8	9	3	4	2	6	8	4	19	3	3	7
Teaching Qualifications	2	6	5	5	11	10	8	2	53	3	6	10
Law Qualifications	4	6	7	4	6	-	8	-	9	-	3	13
Psychology, Social Science, Statistics Graduation/Post Graduation	1	4	2	2	4	2	2	4	16	-	-	-
Medical Graduation/Post Graduation	2	5	-	4	4	-	2	2	3	-	-	-
Interior or Fashion Design Qualifications	4	6	7	4	2	2	-	-	3	3	-	13
Flight Training/In Flight Crew Qualifications	1	5	-	5	2	2	-	-	-	6	-	3
Others	14	42	17	27	30	18	10	15	25	19	10	13
Don't know/can't say	8	8	14	5	6	8	8	10	3	3	10	10

All figures are 's

Skills most sought in a candidate

Q. Which of the following requirements / factors do you MOST look for in a candidate?

- Good communication skills in Arabic and English (65%) is by far the top skill that employers look for in a candidate. Being a team player follows at 48%.



Skills most sought in a candidate – By country

Q. Which of the following requirements / factors do you MOST look for in a candidate?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan (*)
Base: Working	149	158	89	111	24	46	48	3	96
Good communication skills – Arabic & English	71	46	65	63	63	70	63	33	76
Team player - Cooperative / helpful / flexible	43	49	48	55	50	22	56	33	53
Good leadership skills	47	40	47	55	33	35	40	33	33
Ability to work under pressure	42	39	43	45	25	30	46	33	40
Efficient / productive	35	41	35	47	38	30	42	33	57
Good negotiation skills	44	35	35	41	25	28	40	-	38
Overall personality and demeanor	30	33	45	44	25	30	29	-	54
Trustworthy / Honest	38	33	42	41	29	37	40	67	49
Good personal grooming	36	32	40	33	25	35	27	-	43
Passionate / desire to make a difference	34	35	35	39	29	11	35	33	40
Creative	34	33	37	36	17	24	40	67	34
Ability to take on challenges	33	35	38	40	25	22	40	33	27
Well experienced / knowledgeable	36	34	38	40	17	30	33	-	27
Technical skills	34	34	34	33	21	37	31	-	24
Good people management skills	32	27	35	33	25	24	31	-	18
Relevant industry experience	26	27	27	32	8	17	19	33	38
Good contacts / social network	27	25	31	32	13	24	27	-	20
Good analytical abilities	28	24	25	32	8	11	33	-	36
Candidates already in \$q1	22	35	34	25	25	17	19	33	20
Local work experience	26	24	22	23	17	20	10	-	19
Good communication skills – English only	23	39	24	36	29	35	-	-	2
Has not changed jobs very frequently / reliable	14	20	18	19	17	13	13	-	23
Regional work experience	14	14	10	26	13	15	13	-	5
Proven track record	10	12	13	22	-	7	10	-	14

All figures are %'s

(*)Small base (**)Very small base

*Showing only top skills (higher than 10%)

Skills most sought in a candidate – By country

Q. Which of the following requirements / factors do you MOST look for in a candidate?

	North Africa				Asia
	Egypt	Morocco (**)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: Working	241	12	50	7	10
Good communication skills – Arabic & English	80	42	34	43	20
Team player - Cooperative / helpful / flexible	54	58	32	43	40
Good leadership skills	45	42	32	57	40
Ability to work under pressure	49	33	20	29	40
Efficient / productive	45	33	28	14	10
Good negotiation skills	51	67	24	57	50
Overall personality and demeanor	48	58	38	71	10
Trustworthy / Honest	44	50	36	71	10
Good personal grooming	44	25	26	43	40
Passionate / desire to make a difference	44	25	28	43	20
Creative	37	42	12	14	30
Ability to take on challenges	37	8	10	29	30
Well experienced / knowledgeable	29	42	16	43	30
Technical skills	29	33	16	29	20
Good people management skills	35	25	20	43	40
Relevant industry experience	33	17	12	14	10
Good contacts / social network	31	17	10	14	30
Good analytical abilities	25	17	8	14	-
Candidates already in \$q1	20	33	10	-	10
Local work experience	20	17	2	-	10
Good communication skills – English only	3	-	-	29	50
Has not changed jobs very frequently / reliable	14	8	12	29	20
Regional work experience	10	8	-	-	10
Proven track record	12	8	2	14	10

All figures are %'s

(*)Small base (**)Very small base

*Showing only top skills (higher than 10%)

Skills most sought in a candidate – By industry

Q. Which of the following requirements / factors do you MOST look for in a candidate?

	Industry											
	Construction	Other private sector	Retail	Hospitality / Recreation / Entertainment	Industrial manufacturing	IT	Banking / Finance	Oil, Gas & Petrochemicals	Education / Academia	Tourism / Hospitality	Consumer Goods	Business consultancy
Base: Working	165	78	58	55	54	51	50	48	32	32	31	30
Good communication skills – Arabic & English	65	78	69	62	54	61	62	75	63	59	74	57
Team player - Cooperative / helpful / flexible	42	51	45	58	43	47	36	63	34	63	58	40
Good leadership skills	50	50	43	51	44	43	28	50	31	59	58	40
Ability to work under pressure	44	38	34	49	33	37	32	56	25	50	52	33
Efficient / productive	38	47	22	47	46	35	32	50	53	47	45	30
Good negotiation skills	43	49	38	31	43	35	40	44	41	44	52	27
Overall personality and demeanor	30	51	33	36	35	27	38	35	50	47	45	37
Trustworthy / Honest	35	45	29	44	44	25	34	48	44	50	42	30
Good personal grooming	28	49	34	53	37	37	34	31	19	53	39	23
Passionate / desire to make a difference	25	46	33	44	33	24	18	40	31	47	42	27
Creative	31	33	28	42	41	49	20	38	47	50	32	27
Ability to take on challenges	30	31	24	44	31	35	16	50	22	41	45	33
Well experienced / knowledgeable	35	32	31	42	37	29	20	50	34	44	19	27
Technical skills	41	23	21	33	31	47	14	48	16	34	19	27
Good people management skills	34	28	29	38	35	24	16	42	28	47	29	27
Relevant industry experience	26	35	26	25	35	29	22	31	16	25	19	23
Good contacts / social network	31	28	26	24	30	27	16	38	16	31	23	20
Good analytical abilities	25	22	16	20	33	29	20	40	22	31	39	17
Candidates already in Şq1	23	23	26	24	28	37	16	33	13	22	26	20
Local work experience	21	26	26	18	19	29	10	23	9	31	19	17
Good communication skills – English only	25	10	21	27	17	25	24	27	13	16	16	30
Has not changed jobs very frequently / reliable	12	17	16	20	19	16	6	17	13	25	35	17
Regional work experience	17	13	14	15	15	8	2	23	6	13	10	13
Proven track record	10	17	5	16	9	14	8	27	9	13	10	-

All figures are 's *Showing only top skills (higher than 10%)

Experience needed

Q. What experience are you ideally looking for?

- 4 in 10 state that they are looking for candidates with good managerial skills, while 3 in 10 are searching for those with computer skills and experience in sales and marketing.



Experience needed – By country

Q. What experience are you ideally looking for?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan (*)
Base: Working	149	158	89	111	24	46	48	3	96
Managerial – ability to manage a team	32	39	44	46	38	43	25	33	26
Computer skills	26	26	30	33	38	28	42	33	27
Sales and Marketing	25	28	29	23	33	20	31	33	27
Mid level experience (3 to 7 years)	26	31	26	26	25	20	31	-	30
Engineering	33	28	22	40	8	20	10	100	14
Administrative	26	25	22	24	21	24	29	-	23
Senior level experience (7 to 10 years)	19	17	24	27	21	11	23	-	7
Public speaking/Giving Presentations	11	15	10	19	8	4	10	-	21
Junior level experience (less than 3 years)	9	18	7	14	13	15	15	33	25
Secretarial	9	8	10	12	17	7	6	33	7
Very Senior level experience, Department Head or Director (More than 10 years)	7	6	8	15	4	7	2	-	8
Research/ Analytical	7	4	6	6	4	13	8	-	14
Advertising and Media	3	8	10	5	8	2	8	-	7
Teaching	5	8	1	3	4	4	10	-	6
Medical	4	6	7	2	8	4	2	-	1
Journalism/Public Relations	3	4	3	5	8	-	-	-	3

All figures are %'s

(*)Small base (**)Very small base

Experience needed – By country

Q. What experience are you ideally looking for?

	North Africa				Asia
	Egypt	Morocco (**)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: Working	241	12	50	7	10
Managerial – ability to manage a team	42	58	42	86	30
Computer skills	32	42	34	14	50
Sales and Marketing	35	50	24	29	40
Mid level experience (3 to 7 years)	25	33	12	43	20
Engineering	29	-	20	29	20
Administrative	18	17	36	43	10
Senior level experience (7 to 10 years)	12	-	10	14	20
Public speaking/Giving Presentations	24	8	14	14	10
Junior level experience (less than 3 years)	20	17	10	29	10
Secretarial	12	25	6	14	10
Very Senior level experience, Department Head or Director (More than 10 years)	10	17	10	14	10
Research/ Analytical	11	-	8	-	-
Advertising and Media	9	8	8	-	10
Teaching	5	-	14	14	-
Medical	4	-	4	-	-
Journalism/Public Relations	4	17	8	-	-

All figures are %'s

(*)Small base (**)Very small base

Experience needed – By industry

Q. What experience are you ideally looking for?

	Industry											
	Construction	Other private sector	Retail	Hospitality / Recreation / Entertainment	Industrial manufacturing	IT	Banking / Finance	Oil, Gas & Petrochemicals	Education / Academia	Tourism / Hospitality	Consumer Goods	Business consultancy
Base: Working	165	78	58	55	54	51	50	48	32	32	31	30
Managerial – ability to manage a team	39	40	38	40	43	35	52	46	28	34	45	47
Computer skills	26	42	26	25	33	57	36	27	25	31	29	27
Sales and Marketing	14	40	57	36	22	18	24	10	22	28	68	37
Mid level experience (3 to 7 years)	25	41	22	33	26	37	22	29	16	19	19	23
Engineering	70	24	2	5	33	25	6	52	3	6	3	27
Administrative	16	32	17	29	30	18	46	23	22	16	32	33
Senior level experience (7 to 10 years)	25	15	16	13	19	25	6	25	9	16	6	23
Public speaking/Giving Presentations	7	28	12	18	17	8	18	17	9	25	26	23
Junior level experience (less than 3 years)	13	28	16	18	15	22	22	17	6	16	16	10
Secretarial	10	17	12	11	9	8	4	6	6	3	6	13
Very Senior level experience, Department Head or Director (More than 10 years)	8	8	5	5	11	10	4	10	9	9	10	10
Research/ Analytical	4	5	7	7	13	8	12	4	16	6	-	13
Advertising and Media	1	12	9	5	6	10	6	-	13	-	10	10
Teaching	2	6	2	4	4	10	4	2	50	6	3	10
Medical	-	5	3	5	4	-	2	-	9	6	-	3
Journalism/Public Relations	-	3	3	2	4	6	2	-	6	9	-	3

All figures are 's

Last time company hired new employees

Q. How recently in the past has your company hired any new employees?

- A little more than half of working respondents claim that their company has hired new employees in the last 3 months.



Base: Working (1,044)

All figures are %'s



Last time company hired new employees – By country

Q. How recently in the past has your company hired any new employees?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan (*)
Base: Working	149	158	89	111	24	46	48	3	96
In the last 3 months	55	56	53	53	42	50	44	-	54
In the last 6 months	13	11	13	14	17	17	23	-	13
In the last 12 months	7	9	10	13	17	13	8	33	16
More than 12 months back	10	7	7	12	13	2	13	67	6
Don't know/ Can't say	15	16	17	8	13	17	13	-	11

	North Africa				Asia
	Egypt	Morocco (**)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: Working	241	12	50	7	10
In the last 3 months	53	42	28	43	50
In the last 6 months	15	8	20	14	30
In the last 12 months	9	8	10	14	-
More than 12 months back	9	25	26	29	10
Don't know/ Can't say	13	17	16	-	10

All figures are %'s

(*)Small base (**)Very small base



Last time company hired new employees – By industry

Q. How recently in the past has your company hired any new employees?

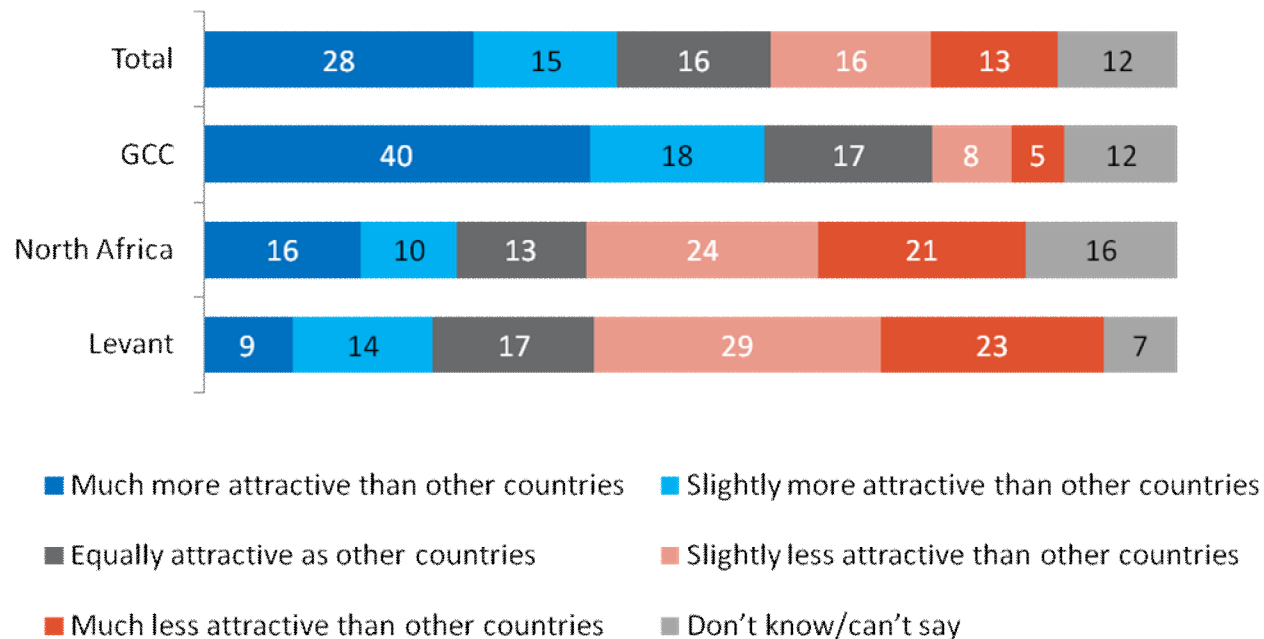
	Industry											
	Construction	Other private sector	Retail	Hospitality / Recreation / Entertainment	Industrial manufacturing	IT	Banking / Finance	Oil, Gas & Petrochemicals	Education / Academia	Tourism / Hospitality	Consumer Goods	Business consultancy
Base: Working	165	78	58	55	54	51	50	48	32	32	31	30
In the last 3 months	49	56	67	64	46	47	54	33	44	69	55	33
In the last 6 months	15	23	7	11	11	16	10	19	19	-	19	20
In the last 12 months	9	4	9	9	9	18	12	13	3	6	16	10
More than 12 months back	13	6	7	-	15	10	4	13	19	13	-	17
Don't know/ Can't say	13	10	10	16	19	10	20	23	16	13	10	20

All figures are 's

Attractiveness of job market in country of residence

Q. How attractive is your country of residence as a job market in comparison to other MENA countries?

- 43% believe that their country of residence is more attractive as a job market than other MENA countries, while 29% claim the opposite.
- A much higher proportion of GCC residents (58%) believe that their country of residence is more attractive than other countries, as compared to those living in North Africa (26%) and in Levant (23%).



Attractiveness of job market in country of residence – By country

Q. How attractive is your country of residence as a job market in comparison to other MENA countries?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan
Base: All	165	187	94	124	27	51	58	6	123
Much more attractive than other countries	45	51	22	43	26	14	12	17	7
Slightly more attractive than other countries	17	18	19	18	19	18	16	-	15
Equally attractive as other countries	21	9	19	23	19	22	14	17	18
Slightly less attractive than other countries	4	5	17	6	15	20	28	33	30
Much less attractive than other countries	3	3	13	3	15	10	26	33	21
Don't know/can't say	10	15	10	8	7	18	5	-	9

	North Africa				Asia
	Egypt	Morocco (*)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: All	280	30	66	9	12
Much more attractive than other countries	16	23	15	11	50
Slightly more attractive than other countries	8	17	15	22	-
Equally attractive as other countries	13	23	9	11	8
Slightly less attractive than other countries	26	10	23	22	17
Much less attractive than other countries	24	10	15	11	8
Don't know/can't say	14	17	23	22	17

All figures are %'s (*)Small base (**)Very small base

Industries attracting/retaining top talent

Q. Which industries would you say are attracting / retaining the top talent in your country of residence today?

- Construction (35%) and Banking/ Finance (33%) emerge as the industries that attract top talent.
- Banking/ Finance is more attractive among respondents in Levant (44% vs. 31% for GCC and North Africa).



Industries attracting/retaining top talent – By country

Q. Which industries would you say are attracting / retaining the top talent in your country of residence today?

	GCC						Levant		
	KSA	UAE	Kuwait (*)	Qatar	Bahrain (**)	Oman (*)	Lebanon (*)	Syria (**)	Jordan
Base: All	165	187	94	124	27	51	58	6	123
Construction	36	40	33	52	19	35	28	67	36
Banking / Finance	25	34	33	34	37	31	48	50	42
Telecommunications	24	22	27	22	11	25	21	50	31
Oil, Gas & Petrochemicals	32	29	33	36	15	35	12	17	4
Tourism / Hospitality	13	31	13	25	15	25	19	17	30
Advertising	10	22	17	18	26	8	33	17	24
Hospitality / Recreation / Entertainment	14	30	27	33	26	18	14	-	20
Consumer Goods	17	14	13	23	15	12	17	33	24
IT	18	24	15	23	22	10	21	-	28
Government / Civil service	14	25	15	15	11	22	5	17	16
Electronics	14	16	15	11	7	18	5	17	20
Medical / Health Services	16	18	22	23	11	10	10	17	24
Business consultancy	15	20	20	16	15	10	21	33	17
Transport / Travel	12	22	14	17	11	18	10	17	11
Retail	13	18	18	19	19	10	10	33	15
Pharmaceuticals	10	11	10	8	11	6	21	33	27

All figures are %'s (*)Small base (**)Very small base *showing only top industries (higher than 10%)

Industries attracting/retaining top talent – By country

Q. Which industries would you say are attracting / retaining the top talent in your country of residence today?

	North Africa				Asia
	Egypt	Morocco (*)	Algeria (*)	Tunisia (**)	Pakistan (**)
Base: All	280	30	66	9	12
Construction	28	30	30	-	25
Banking / Finance	33	30	23	33	58
Telecommunications	28	37	26	33	17
Oil, Gas & Petrochemicals	24	10	29	44	8
Tourism / Hospitality	18	47	18	22	17
Advertising	23	27	14	11	25
Hospitality / Recreation / Entertainment	10	13	8	44	17
Consumer Goods	21	30	27	-	17
IT	13	23	11	11	8
Government / Civil service	14	23	29	-	17
Electronics	21	33	20	-	17
Medical / Health Services	11	20	15	22	17
Business consultancy	15	7	8	22	33
Transport / Travel	10	27	26	22	17
Retail	13	10	11	22	8
Pharmaceuticals	17	13	6	-	8

All figures are %'s (*)Small base (**)Very small base *showing only top industries (higher than 10%)

Thank you