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SECRETARIAT OF STATE FOR PROFESSIONAL TRAINING AND EMPLOYMENT POLICY

DIRECTORATE GENERAL
LABOUR MARKET INFORMATION DEPARTMENT

Enterprise and Skills Survey

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Preface

Secretariat of State for Professional Training and Employment Policy (SEPFOPE) is very pleased to share the results of the Enterprise and Skills Survey (ESS) with all the readers in Timor-Leste. The current ESS which was undertaken in January 2014 is the second survey conducted by the *Departamentu Informasaun Merkadu Traballu* (Department of Labour Market Information:DIMT) and the purpose of this survey is to inform all the Timorese, especially businesses about the labour market situation in Timor-Leste.

SEPFOPE hopes that the results of this report can provide relevant information that can contribute to Government policies for promoting economic development in the country through the National Employment Program for which SEPFOPE is responsible. SEPFOPE would like to inform the readers that there are significant improvements in the ESS 2014 following the feedback and recommendations received on the first survey. We have tried to do a more thorough data analysis to present the results.

In ESS 2014, results have been presented on specific occupations, recruitments, and vacancies. This research provides a general overview on the employment situation in the country. The survey also offers some solutions to address the short and long-terms skills requirements of enterprises. There is need to create greater synergies in the labour market between the Government, vocational training providers, and industries to help the workforce to develop skills for employment.

In future, we hope that there is more cooperation with the industries because partnerships with the industries are the only way we can develop the skills of Timorese workers. We would like to affirm that SEPFOPE will form a technical group to facilitate high level meetings between the Government, vocational training providers, and industries with an aim of improving competencies of the workforce so that they can meet the demands of the labour market.

SEPFOPE would like to thank the enterprises, representatives of industries, industry sub-commissions and the Chamber of Commerce and Industry (CCI) for their cooperation. They have contributed a lot during the research. SEPFOPE would also like to thank all of those who have been involved in the research process.

SEPFOPE would also like to express gratitude to the Department of Foreign Affairs and Trade (DFAT), Australian Aid and the International Labour Organization for providing funding and technical assistance in the implementation of the ESS 2014.

Gabinete do Secretário de Estado SEPFOPE

IlidioXimenes da Costa
Secretary of State for Vocational Training and Employment Policy

Executive Summary

In 2014, the Labour Market Information Department (DIMT) in the Secretariat of State for Professional Training and Employment Policy (SEPFOPE) undertook a second *Enterprise and Skills Survey* (ESS). This follows the ESS 2013 which was conducted in 2013 which targeted over 800 enterprises in Timor-Leste. ESSs are useful exercises that can enable regular analysis of the labour market situation. A strong knowledge base is essential for evidence-based policy formulation. In particular, the analysis from ESSs can feed the design, implementation, and monitoring of economic policies and programmes geared towards training, and employment creation.

The ESS 2014 builds on the findings of ESS 2013 and provides the reader a more comprehensive overview of the labour market and evolving priorities of the enterprises vis-à-vis skills. Compared to the previous survey, the scope of the ESS 2014 was broadened to cover more industries and business sub-sectors, and skills have been analyzed at specific (four digit) occupational level. Moreover, short-term recruitment trends were explored to get a better sense of demand for occupations and skills gaps prevalent in the country. While the sample size for ESS 2014 was much smaller than ESS 2013, the survey methodology and instruments used were more sophisticated and in line with international practices. The aim was to focus on relatively larger businesses and less on microbusinesses that are typically run by one person.

Considering the relative complexity of the survey instrument, data gathering and subsequently analysis of data posed several challenges. However, it provided good learning opportunities for the DIMT research team. The lessons learned from ESS 2014 will undoubtedly help DIMT to further improve the survey methodology and the quality of data. The ESS 2014 provides a number of interesting findings which are briefly summarized here:

The survey confirms some of the key findings from ESS 2013. There is continued growth in employment and demand for skills in construction and service sectors of the economy. As mentioned, ESS 2014 attempted to target formal and larger businesses. Even then, around 73% of the enterprises are what can be described as “single shareholder” company (Unipessoal Lda) in Timor-Leste. More than half of the enterprises are owned by Timorese nationals. Several Indonesian (17.8%) and Chinese (9.7%) owned companies are also present.

In the last two years, the number of employees in the enterprises has grown by 13.8% which is a significant. The increase in the number of workers is even much higher (23.4%) from 2012-2013. In 2012 there was in fact a decrease (-8%) in the total number of workers employed. It could well be a reflection of slower growth in non-oil GDP which according to the latest national accounts report fell from 13.2% in 2011 to 5.5% in 2012.

Sale and services related occupations saw an increase of 76% from 2011 to 2013. Although not as high as sale and services, the number of associate professional also increased (36%) significantly during this period. All of this evidence underlines the ongoing structural changes in the economy including growth of the services and construction sectors. This growth is creating more jobs. However, many of these jobs are at the lower end of occupational ladder which arguably require less specialization.

In 2013, close to 40% of the managers and 30% of the professionals were foreign nationals. A high percentage of foreign nationals working as managers and professionals seem to suggest potential skills gaps. It is possible that labour with required skills needed for managerial and professional positions are in short supply. The results from the labour force survey (LFS) 2013 seem to corroborate the short supply of advanced skills. According to the LFS 2013, a small percentage of the labour force have either a vocational/polytechnic diploma (5.3%) or a university degree (8.9%).

In the last two years, around 40% of the enterprises had hired new staff. The recruitment pattern shows a distinct demand for jobs in the construction and services industry. Shopkeepers, motor vehicle mechanics, receptionists and secretaries, bartenders, bricklayers, to name a few, are some of the occupations that have shown consistent demand. These occupations are also exhibit a much higher turnover.

With regards to current vacancies, enterprises are mainly looking for truck drivers, electricians, pharmaceutical and midwifery associates, and motor vehicle mechanics. These occupations were also cited by enterprises as the most difficult to hire. Owing to difficulty in hiring for these occupations increases the workload for other staff, enterprises are not able to develop new products and services, and in some cases they end up losing business orders.

In future, enterprises expect to hire more motor vehicle mechanics, construction supervisors, mechanical engineering technicians, and business managers. It appears that businesses anticipate expansion in the services and construction sectors will continue. In 2012 the construction sector in fact shrunk by -6.6% and some of the sub-sectors in the service industry such as professional and technical services also contracted by -1.5%. It will be interesting to see if the optimism of enterprises that growth in construction and services will continue actually happens once the data from the national accounts for 2013 and 2014 becomes available.

Overall, the ESS 2014 shows that there are skills gaps across all the occupational categories. On one hand there is a relatively high percentage of foreign workers in managerial and professional level positions while on the other hand enterprises, in some cases, are finding it difficult to fill positions ranging from professionals to crafts and trades workers. It appears that growth in services and construction sector has created more demand for certain occupations.

The skills gap as a result of a mismatch between demand and supply presents an opportunity for more targeted public investments in training and education of the workforce. It is important to note that a survey cannot be treated as a "crystal ball" that can precisely predict the future. The results are indicative of a trend and one of the key messages from ESS 2014 is that there is employment growth which is also revealing skills gaps and shortage of skills in Timorese workforce. However, one cannot assume that these trends will keep repeating.

A policy question therefore is whether there is a tradeoff if more investment in education and training are made now when the country faces so many development challenges? Perhaps the answer to this policy dilemma lies in how policy makers perceive development. If education and training is seen as means for achieving a higher goal- perhaps very high economic growth- then cost-benefit analysis that excludes social benefits should guide funding choices. But, if education and training are seen as means to enlarge choices of individuals and promote human development then clearly there is less tradeoff. If human development is indeed the policy imperative, funds for skills education and training should be ring-fenced to ensure adequate and predictable financing in future.

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BAS	Business Activity Survey
DFAT	Australian Department of Foreign Affairs and Trade
ESS	Enterprise & Skills Survey
JICA	Japan International Cooperation Agency
DIMT	Department of Labour Market Information
IADE	Instituto de Apoio ao Desenvolvimento Empresarial
ILO	International Labour Organization
INDMO	National Labour Force Development Institute
ISIC	International Standard of Industry Classification
ISCO	International Standard Classification of Occupations
LDA	General partnership company
LFS	Labour Force Survey
SEPFOPE	Secretariat of State for Professional Training and Employment
TESP	Training and Employment Support Project
UNIP	Unipessaol (Single shareholder company)

Section 1: Background

1.1 Introduction

The Enterprise and Skills Survey (ESS) 2014 is the second enterprise level survey that was undertaken by the Labour Market Information Department (DIMT) in the Secretariat of State for Professional Training and Employment Policy (SEPFOPE). The ESS 2014 builds on the findings of ESS 2013 to provide the reader a more comprehensive overview of the labour market and evolving priorities of the enterprises vis-à-vis skills.

While some skills related surveys and assessments have been undertaken in the past, the ESS 2014 provides greater breadth in terms of industrial sectors, occupation breakdown, and short-term recruitment trends in enterprises. Needless to say, this made the task of data gathering and subsequently analysis lot more complicated compared to the ESS 2013. In this regard, a revised survey questionnaire was used for ESS 2014 with an aim to further explore the nature of employment, occupations, and skills of the workforce in selected enterprises.

The ESS 2014 was conducted to provide insights into the labour market in light of high growth in the non-oil sector which has averaged 12.1% from 2006-2011.[1] Specifically, the objective of the survey was to gather more information from businesses about their workforce, nature of their business, short-term recruitment patterns, vacancies, hard to fill positions, and training for employees. The ESS 2014 is seen as an improvement over the ESS 2013 survey which focused on fewer areas. The ESS 2014 includes a more detailed disaggregation by occupations, hiring patterns, difficult to find skills, and some comparisons of first time job seekers with different educational backgrounds.

Following ESS 2013, DIMT organized several briefing sessions in Dili and selected districts to share the findings from the survey. The participants in these briefings included senior government officials representing various ministries and departments, non-governmental organizations including research institutions, and international development agencies. Valuable feedback was provided by the participants which helped in refining the methodology for ESS 2014. Owing to the positive feedback that ESSs have received, DIMT is now considering conducting the ESSs on a biannual basis, one at the start of the year and one in the latter half of the year. As of writing of this report, the preparations for the second ESS 2014 survey have already commenced.

1.2 Previous Enterprise & Skills Assessments

The Business Activity Survey (BAS) conducted by the Directorate General of Statistics is the only enterprise level survey which is being carried out on an annual basis. The BAS provides useful information on investment trends and hiring patterns.

[1] *Director General Statistics (DGE), Timor- Leste National Account 2000-2011*

The BAS focuses on administrative and financial data submitted by registered firms having a tax identification number. This survey does not look into skills of the workforce. There is only one question in the BAS that is related to employment. The ESSs therefore complement the BAS by providing more detailed information about employees, skills, and training needs.

In 2009 an enterprise assessment supported by International Labour Organization (ILO) and Australian Government was conducted targeting firms in the construction sector. The survey provided an overall trend and detailed requirement of occupations and skills needed by firms in the construction sector. More recently, the Japan International Cooperation Agency (JICA) has done an employment and labor force study which looks at possible impact on employment creation from large scale public infrastructure programmes in the country. The assessment was based on a social accounting matrix model.

The National Labour Force Development Institute (INDMO) has also commissioned several sub-sector studies as part of the process to develop qualifications and training courses. The results from these studies have been used as a basis for dialogue with the industry representatives, identification of skills gaps in the industry, and to forge partnerships with the businesses in the delivery of training. Among others, the sector analysis has focused on general administration and finance, oil and gas, and the automotive sectors.

Some of the INDMO studies have focused on defining the tasks and functions in businesses that can be grouped into a cluster or industry. This is understandable in a country like Timor-Leste where the private sector is fairly small and mainly micro and small enterprises are present. In microenterprises skills and functions are not always delineated as workers are expected to do several tasks. However, the INDMO study on the oil and gas sector takes a slightly different approach by looking at possible impact on job creation from investments in the southern coast and anticipation of skills required both during the construction of infrastructure such as the supply base, port, and petrochemical processing plant and future workers needed who will be employed at these facilities.

Furthermore, a number of sector studies focusing on industry or business sub-sectors have been carried out in Timor-Leste. In addition to this, the government has prepared several sector plans and strategies. Agriculture and trade sector plans have already been developed. Values chain studies targeting coffee, red meat, horticulture, to name a few, have also been undertaken. The Strategic Development Plan also provides an overview of priority sectors that the government wishes to support. These sector studies and plans are useful to gauge the potential and likely expansion in these sectors.

The ESS 2013 was the first major attempt in recent years that took a more quantitative approach in analyzing demand for skills across several sectors. The ESS 2013 drew attention to the temporary nature of work, especially in the construction sector. The survey revealed that businesses value higher qualifications, specialized skills, and experienced workers. Among others, enterprises regarded skills in engineering, carpentry, finance and administration, and informatics and computer as important for future recruitments in construction.

Similarly, finance and administration, hospitality, and customer services were some skills that enterprises in the trade & services sector prioritized as important for future recruitments. The survey showed that there are possibly skills shortages, which perhaps is explained by the presence of foreign workers in several occupations, even those at the elementary occupational level. Approximately 4.5 percent of the employees in the firms were foreigners with a much higher proportion in the automotive sector in which more than 13 percent workers are non-Timorese nationals. The trade sector also has a relatively high number of foreign workers (8.9 percent).

1.3 Enterprise and Skills Survey 2014: Aim & Objectives

The ESS 2014 aims to further feed the labour market knowledge base. The primary objective of ESS 2014 was to assess employment situation in the enterprises: recruitment patterns by industry and occupations, demand for occupations, skills gaps, and training opportunities for the workforce. The survey was designed to provide insights into the labor market in selected sectors by analyzing growth trends, impact of this growth on job creation, and type of skills that are in short supply or experiencing greater demand.

A secondary objective of the survey was to further accumulate data that can be used as part of a time-series which will allow in-depth trend analysis that can possibly guide skills forecasting in the future. At the moment there is limited time series data available from enterprises. As mentioned above, only a few enterprise assessments have been conducted in the past. As such, it is not possible to undertake a full-fledged forecasting exercise using econometric analysis.

The ESS 2014 used a cross sectional survey technique and randomly targeted a sample of enterprises in selected industries for interviewing. Obviously, the data and information collected mainly reflects current and past trends. One cannot assume that these trends will be repeated in future. In this regard, the results from ESS may not be very useful for long-term skills forecasting, but it provides very valuable information for analyzing patterns in the short and medium-term. ESSs are however critical for feeding training and human resource development in a country. Results from the enterprise assessment are very useful to provide an indication of short to medium term needs using extrapolations from the past. ESS 2014 does not provide precise numbers about occupations, but a general estimate of likely trends and indication of demand and gaps in skills.

In general, ESSs are used for developing workforce training plans. These include the type of training courses and skills development programmes needed to ensure that those who are already in the labor market or future entrants in the labor market have the information as well opportunities to learn skills that the economy requires. The workforce training plans should reflect the current and future demand for skills, existing supply of skills, gaps, and policy actions needed to address shortage of skills. It is expected that the relevant directorates in SEPFOPE and other institutions involved in training human resources will use the findings in this report to formulate their training programmes.

The following research queries were identified to guide the design of the survey instruments and data analysis. This list is by no means exhaustive and in future the queries will be further refined based on consultations with key stakeholders.

1. Typology of enterprises and general size of their operations
2. Breakdown of occupational categories and skills sets currently used by enterprises
3. Change in the total stock of employees to assess the growth of the businesses and demand for workers
4. Change in the skills profile of workers reflecting the current needs in the labour market and future potential
5. Number of foreign workers employed over time which can be used as a proxy for skills shortages in the country
6. Future demand for workers assessed through existing plan for recruitments
7. Assessment of skills and competencies of current employees
8. Priority areas for training and plans to support human resource development

The major improvement in 2014 over the previous ESS was the level of detail and disaggregation of occupations. The cross-sectional nature of the ESS 2014 also helped to capture short-term trends in employment by different occupations. Other improvements included better profiling of enterprises, breakdown of sex and nationality of employees, and whole set of questions on vacancies, hard to fill positions, and training provision for employees. With these improvements, it was possible to better assess the current labour market situation while at the same time to see recent trends in hiring patterns, and the demand for skills in key industries.

1.4 Survey Methodology

Broadly, the ESS 2014 exercise was divided into three stages. Firstly, a review of existing literature and consultations with key stakeholders were undertaken which helped to further fine tune the methodology, including improvements in the design of the survey instrument. Literature review mainly focused on national accounts, sector and value chain studies, government sector plans and strategies, and reports from the household surveys. Among others, results from the labor force survey 2010 and 2013 were reviewed along with the employment data from the Census 2004 and 2010.

A number of sectors and sub-sectors were pre-selected for analysis in this study. The sub-sectors for ESS 2014 were chosen based on those sectors that have shown high growth in recent times, sectors that have been identified as national priorities, and sectors that require greater supply of technical and vocational skills. Feedback was also sought from relevant stakeholders including those involved in provision of training. The sectors or industries chosen were according to the International Standard of Industry Classification (ISIC Rev4) and consistent with the use of industry classification for the national accounting system in Timor-Leste.

The five main industries chosen for ESS 2014 were:

1. Manufacturing
2. Construction
3. Wholesale & Retail Trade
4. Services
5. Hospitality

The survey used a stratified random sample targeting a total of 381 registered enterprises. The sample was taken from the list of businesses targeted under the Business Activity Survey. The sample pool of enterprises is essentially small and medium sized businesses that have a tax identification number. The stratification of the sample was done by sectors based on the classification in the list of enterprises. However, during interviewing it became evident that several enterprises were involved in a number of economic sectors and the sector they indicated as their primary area of business was different from the sector that was in the list.

The survey questionnaire was adapted from the British National Employment Survey Questionnaire. Modified version of this questionnaire has been used in several countries. In particular, the ESS 2014 draws from the experiences of a similar survey conducted in Cambodia by the National Employment Agency.[2] Compared to the ESS 2013, the questionnaire used for ESS 2014 was more comprehensive and included several dimensions related to skills and employment. The complexity of the instrument required extensive training of enumerators. The training included mock interviews and pilot testing. Based on the results from these tests, the questionnaire was further revised before interviews started.

[2] *Skill Shortages and Skill Gaps in Cambodian Labour Market: Evidence from Employer Skills Needs Survey*

To ensure that occupations can be disaggregated at the four digit level, pre-assigned occupations or occupational categories were not listed in the questionnaire. The respondents were asked to specify occupations which were later encoded according to the International Standard Classification of Occupations (ISCO-88). Collection of data from the lowest occupational level (four digit ISCO-88), encoding, and subsequently analyzing this data was a laborious task. Naturally, the detailed breakdown of occupations affected the volume of frequencies in the data as the results were more spread out.

However, it was felt that this level of disaggregation was warranted as it could provide useful information in the development of qualifications for vocational and technical training. It was felt that the level of detail by occupations was necessary for training institutions when designing qualifications and training curriculum. In Timor-Leste an accredited vocational training system has been established very recently. The information from enterprises and their inputs are essential in the development of a demand-based training system. In future surveys, however, some modifications will be necessary to ensure the balance between the level of detail and the practicality of managing and analyzing this data.

The interviews with enterprises were conducted from December to February 2014. The data collected was then entered in a data file which was created using the statistics software SPSS The use of SPSS for data analysis was also an improvement and a reflection of enhanced capacities in the DIMT. In 2013 for the ESS a simple Excel database was developed for entering and analyzing the data. Following the ESS 2013, the staff in DIMT was supported to attend a formal training programme on research methodologies and use of SPSS. Also, they received ongoing training and day-to-day coaching on data analysis.

Section 2: Key Findings

2.1 Profile of Enterprises

More than one third of the 381 businesses interviewed are engaged in wholesale and retail trade (Figure 1). As mentioned, the stratified sample was designed to ensure that more enterprises from manufacturing, construction, and services were targeted under ESS 2014. The ESS 2013 had selected the sample based on a proportional percentage of business units from each of the major economic sectors. With a vast majority of businesses in Timor-Leste engaged in trade and construction, these sectors were "over represented" in ESS 2013. An important consideration for selection of industries was to target those sectors of the economy that usually require more technical and specialized skills. The assumption was that retail trade in Timor-Leste is dominated by micro-enterprises in which typically the owner of the business carries out multiple functions. In small informal enterprises there is usually less emphasis on division of functions and specialization of tasks.

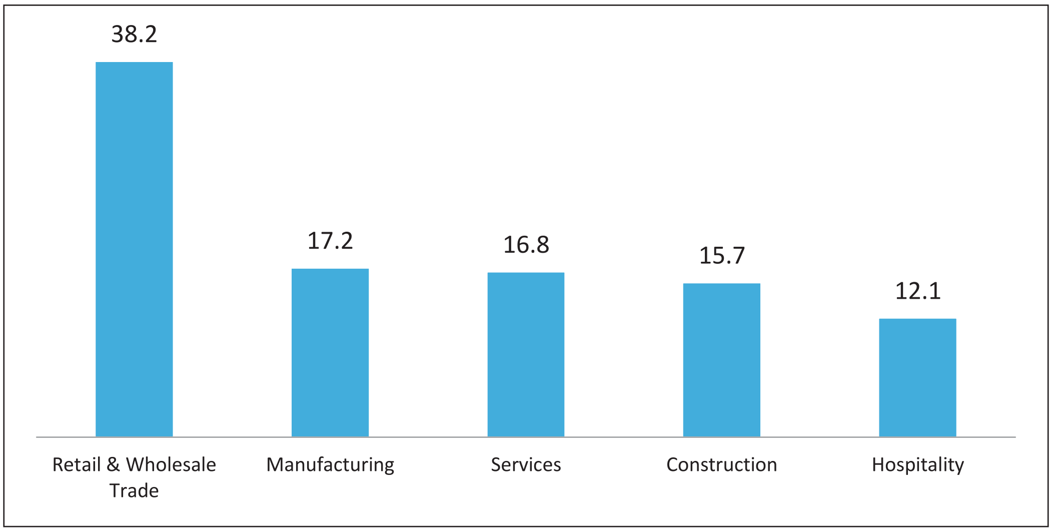

Figure 1. Breakdown of enterprises by sectors/sub-sectors (%)

In Figure 2 we can see that almost 73% of the companies interviewed are owned by individuals with a single shareholder (Unipessoal: Unip Lda). 20.2% are general partnerships (Lda) involving more than one shareholder. The presence of a large number of single shareholder enterprises is consistent with the state of the economy and the private sector development in Timor-Leste. A nascent private sector means that there are very few medium or large sized businesses in the country. In addition to single shareholder (Unip Lda) and general partnerships (Lda), there are very few foreign companies (1%) registered in the country as subsidiaries or branches of foreign companies.

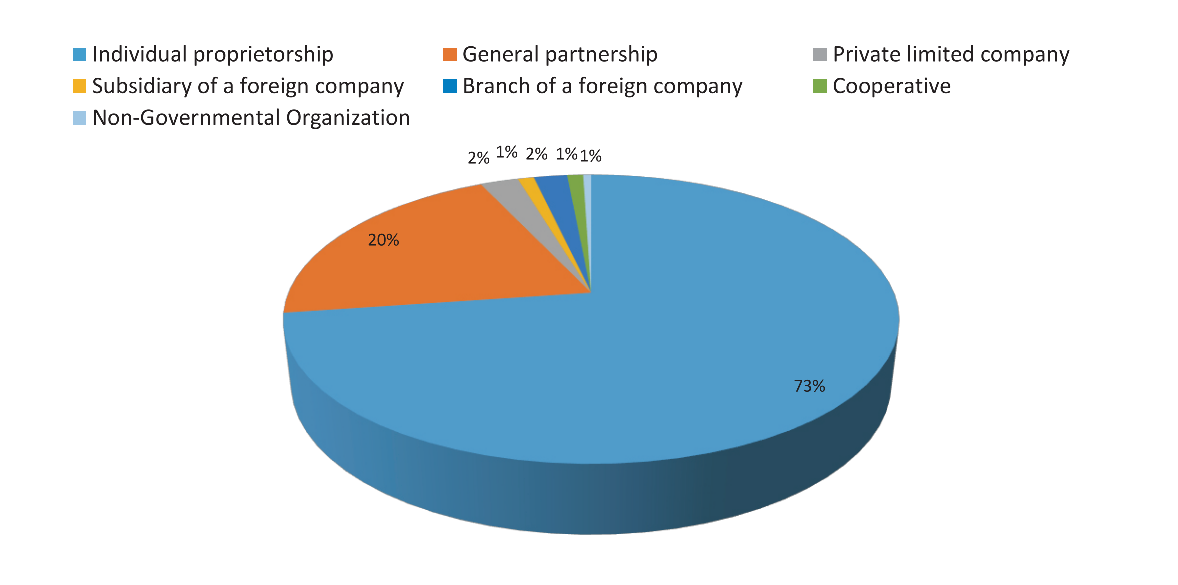

Figure 2 Type of Enterprise

More than half of the businesses interviewed are owned by Timorese nationals while 17.8% and 9.7% have Indonesian and Chinese owners respectively (Figure 3). Another 5% of the companies are owned jointly by Indonesian and Timorese nationals. There are a smaller number of Malaysian (2.6%) and Singaporean (2.4%) companies. Around 11% of enterprises, grouped as "others", are owned by persons of different nationalities.

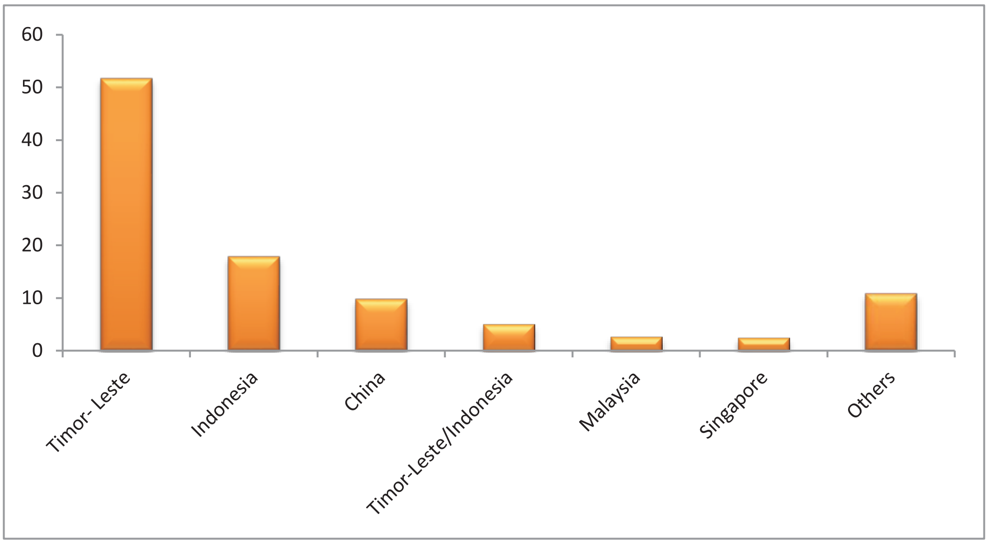

Figure 3 Ownership of enterprises by nationality (%)

It appears that non-Timorese businesses are less concentrated in the construction industry and more dominant in retail and wholesale trade (Figure 4). There has been a sizable expansion in the construction sector as a result of increase in government funding for infrastructure. It seems that mostly Timorese companies are dominant in this sector and perhaps because they are more likely to be awarded government construction contracts which maybe get sub-contracted to foreign companies. In trade more than 62% of businesses are owned by foreigners or Timorese in partnership with a foreigner. Among businesses owned by foreigners, Indonesian businesses are more concentrated in trade and hospitality sectors. Chinese businesses are more active in the trade sector.

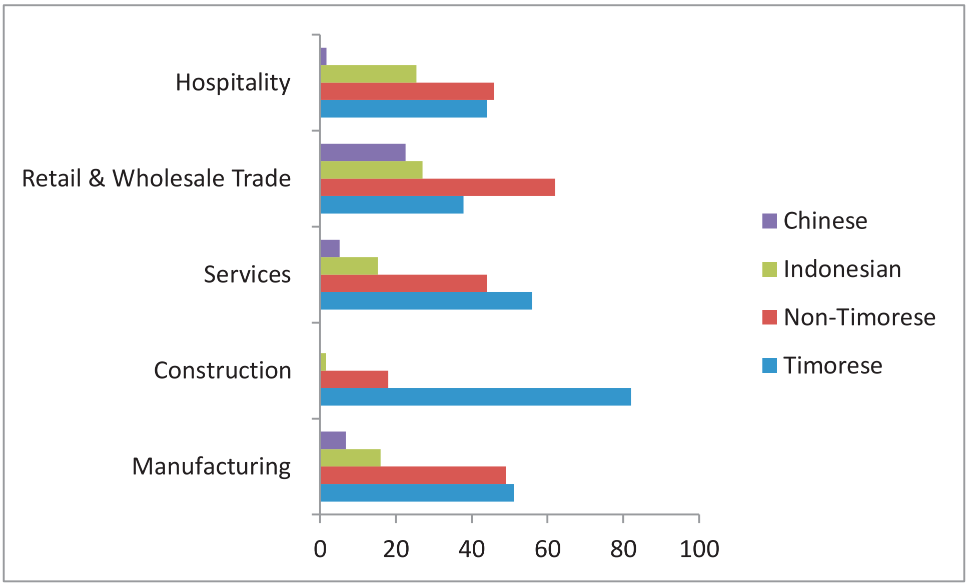

Figure 4 Businesses sectors and ownership by nationality (%)

2.2 Past and Current Employees

A breakdown of occupational categories shows (Table 1) that men dominate almost at all levels and this has not changed much in the last three years. The highest number of female workers are found in elementary occupations followed by clerical support staff and service and sales workers. A small number of women are in managerial positions. The percentage of females in professional level positions (19.1% in 2013) is relatively higher but still less than males in similar occupational level.

A small number of females (3.6% in 2013) are working as plant and machine operators. The breakdown of occupations at different levels shows that 43.2% of the employees in 2011 worked in elementary occupations. By 2013 the proportion of elementary workers has slightly dropped to 41.6%. The proportion of managers has also dropped slightly from 9.8% in 2011 to 9.5% in 2013.

There has been a visible increase in the number of the service and sale occupations. In 2011 only 7.1% of the employees were in the service and sale occupations while this proportion has increased to 11.4% in 2013.

With changes in the survey questionnaire it was possible to see the breakdown of employees by their nationality. The distribution of foreign workers across different business sectors, type of functions and occupations held by foreign workers is an important indicator to understand skill gaps in Timor-Leste. The presence of foreign skilled workers can also inform the formulation of a labor content policy, skills development schemes that are more responsive to the market, as well as encourage companies to take measures for transfer of skills.

The number of foreign workers is relatively high in managerial and professional positions. The number of foreign managers and professionals has increased from 2011 to 2013. In 2011 out of the total managers 34.3% were foreign nationals which further increased to 39% in 2013. Similarly, the proportion of international professionals working in these enterprises also shows a slight increase from 28.9% in 2011 to 29.8% in 2013.

Interestingly, 6% workers in elementary occupations are also foreign nationals. While the number is significantly lower than senior and more specialized occupations, it does suggest that there is either a "shortage" of labor or possibly companies perceive productivity gaps between Timorese and foreign workers even for elementary level jobs. Further research is needed to understand supply of labour for elementary occupations.

There are around 8 employees (median) per enterprise. It is important to note here that sample of businesses was taken from the list that is used for the BAS which includes companies that have a tax identification number. This list includes somewhat larger businesses in the country that are active. In the ESS 2013 the sample was from drawn from a list of businesses- micro, small, and medium sized- that is maintained online by Instituto de Apoio ao Desenvolvimento Empresarial (IADE).

Occupational category	2011				2012				2013			
	Total	Female	Male	Foreign	Total	Female	Male	Foreign	Total	Female	Male	Foreign
Managers	475	73	402	163	453	68	385	175	515	76	439	201
Professionals	682	126	556	197	670	135	535	187	692	132	560	206
Associate professionals	183	15	168	33	159	13	146	20	241	43	198	25
Service and sale workers	353	149	204	21	566	170	396	29	623	184	439	43
Clerical support workers	524	216	308	46	496	215	281	48	551	249	302	51
Craft & related trades workers	256	22	234	18	273	23	250	13	274	23	251	15
Plant & machine operators	340	8	332	35	348	12	336	37	393	14	379	51
Elementary occupations	2,144	229	1,915	129	2,102	230	1,872	128	2,352	294	2,058	145
Total	**4,957**	**838**	**4,119**	**642**	**4,571**	**866**	**3,705**	**637**	**5,641**	**1,015**	**4,626**	**737**

Table 1 Number and breakdown of employees (2011-2013)

Between 2011 and 2013 the number of workers in the firms has increased by 13.5% (Figure 5). The total number of workers dropped in 2012 and then increased again in 2013. In fact, there was almost a 22% increase in the number of workers in 2013. The largest increase of 76% was observed for workers in the service and sales occupations. There was also significant increase (32%) in the number of associate professionals while the percentage of plant and machine operators increased by 16%. These numbers seem to suggest that there has been a major expansion in construction and service industry. In 2012 the drop in the number of employees seems to be consistent with the data from the national accounts in 2012 which was released at the time of writing of this report. In 2012 the value added in construction was -6.6%. In the past construction has been the main driver of employment, particularly providing a lot of temporary and short-term employment.[3]

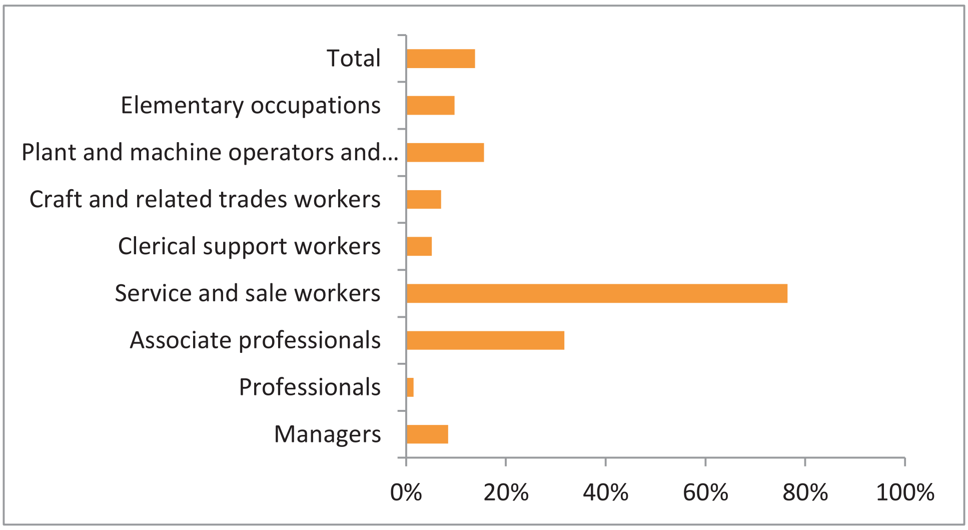

Figure 5 Growth in employees by occupational levels (%)

2.3 Recruitment Trends

A total of 40% of the businesses stated that in the last three years they had filled any permanent or temporary positions. The remaining 60% of the businesses interviewed said that they did not recruit any new staff. A breakdown of new recruitments and an indicative trend from 2011 to 2013 is shown in Figure 6, 7 and 8. The recruitments have been grouped by all, women, and foreign workers. Overall, Figure 6 shows new recruitments in 2011, 2012, and 2013 for occupations such as shopkeepers, motor vehicle mechanics, receptionists, executive secretaries, bricklayers, and cleaners. Recruitment for concrete placers, wood treaters, accounting associate professions, and cooks has happened in 2013. Transport clerks and business services and administration managers have been hired mainly in 2011 and 2013.

As far as recruitment of women is concerned, Figure 7 shows shopkeepers, bartenders, receptionists, and cooks as the main occupations for which women have been hired. In 2013 women have also been hired as accounting associate professionals. In terms of foreigner workers, recruitments for bricklayers, civil engineering laborers, and more recently wood treaters are common. It is interesting to note that these occupations in many developing countries are usually occupied by nationals. As discussed in ESS 2013, it is possible that there is lot of demand for these types of skills while there is limited supply of local labour or skills offered locally are not considered adequate.

[3] *For more about short-term nature of work in construction sector refer to Enterprises & Skills Survey 2013*

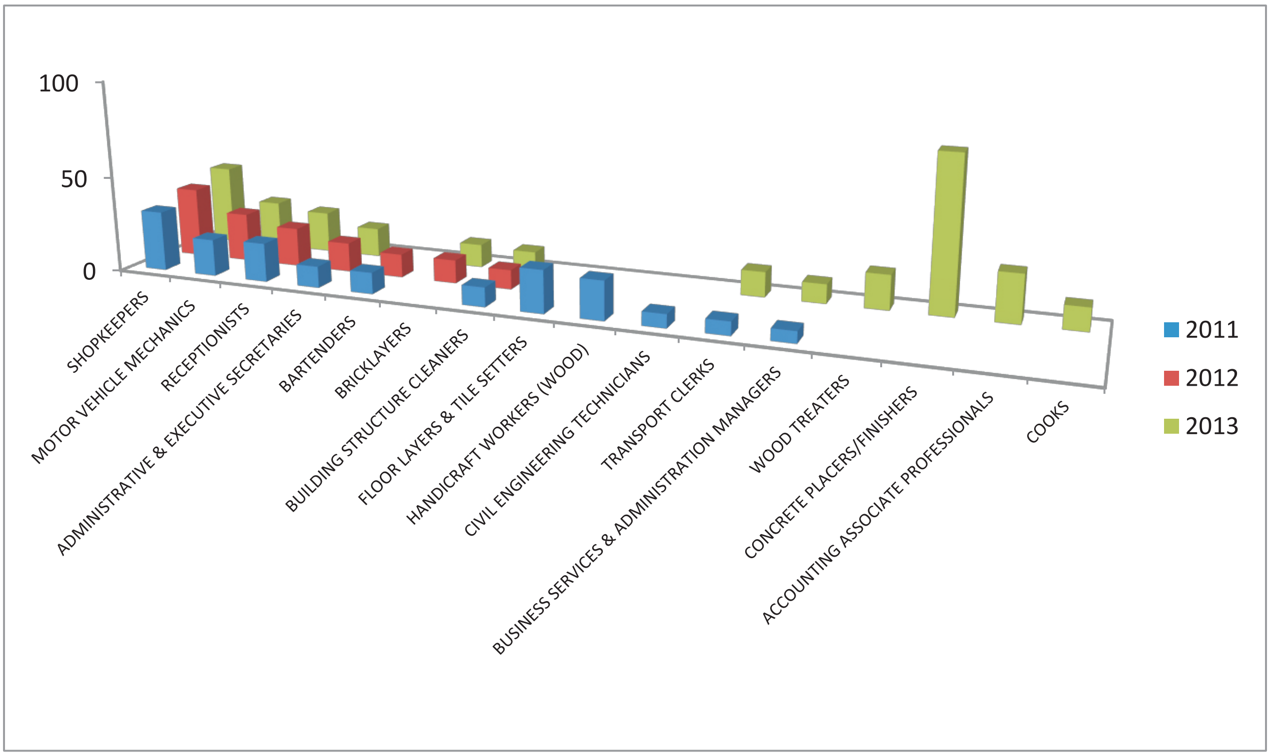

Figure 6 Highest number of workers added by occupations

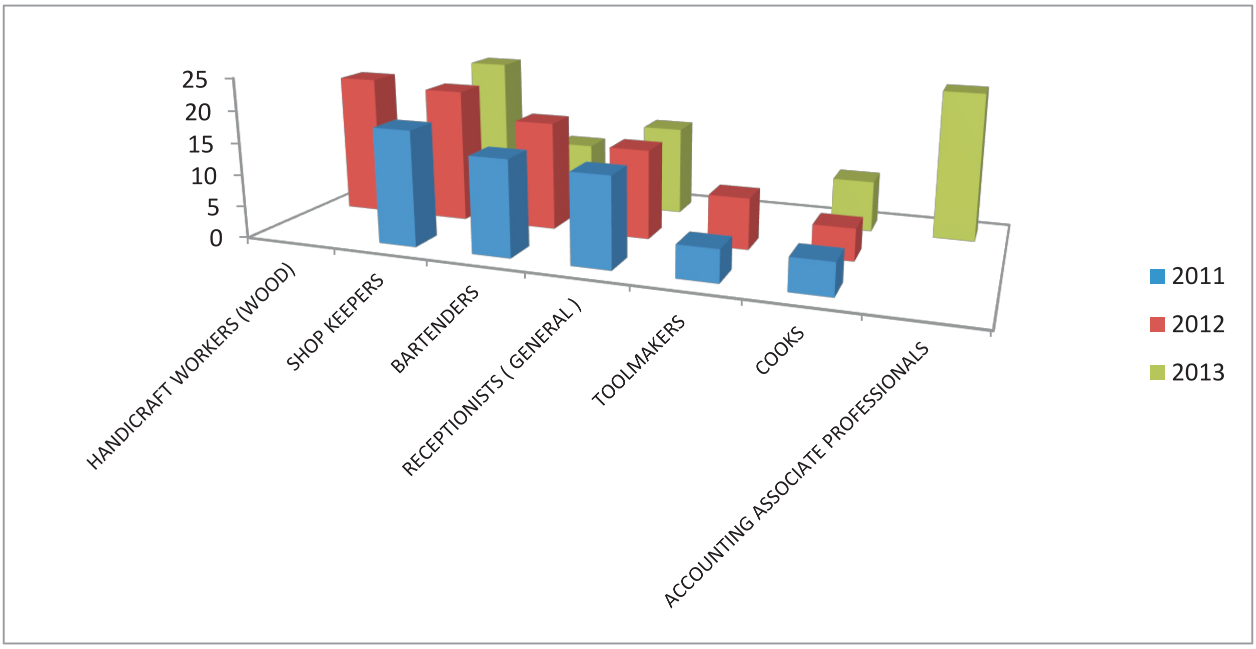

Figure 7 Highest number of female workers added by occupations

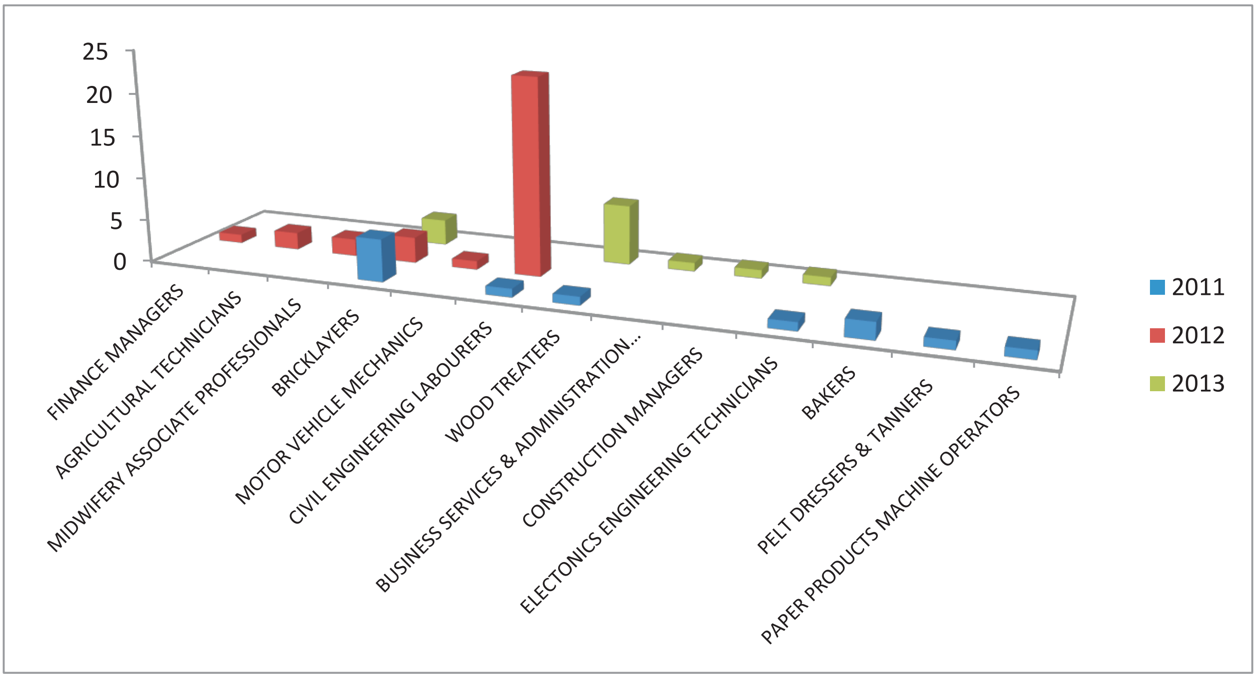

Figure 8 Highest number of foreign workers added by occupations

It is important for a demand-driven training and education system to find out how employers assess competencies of staff coming from different educational institutions. Being first time job seekers, it is assumed that skills that these recruits have on offer have been learned mainly while studying. First, the enterprises were asked to provide the breakdown of first time job seekers that they had recruited by their level of education: secondary school diploma, vocational and training certificate, and university degree.

Almost half of the businesses that were interviewed had hired first time job seekers. Among these, a majority (78%) of the first time job seekers who were hired came from secondary and technical and vocational schools. Businesses ranked first time job seekers from university as better prepared or more job- ready as compared to those coming from vocational schools who were ranked higher than secondary schools. According to the businesses a higher percentage of first time job seekers who come from secondary school (10.6%) are poorly or very poorly prepared as compared to those who have qualifications from technical/vocational schools (7.1%) or who come from universities (3.1%).

Among those who mentioned that first time job seekers are poorly prepared, lack of job skills of graduates from secondary schools was cited (81.5%) as one of main competencies that they lack. Basic education skills such as literacy and numeracy were also pointed out as areas where secondary school graduates were not well prepared. Interestingly, poor attitude and lack of work ethics was seen as a problem with both secondary and university graduates (88.8%) and less with those from technical and vocational schools (11.1%).

When asked about staff turnover, around 35% of the companies reported that they had one or more staff who had left their company in the last three years. The occupations that have registered the highest number of exits are shopkeepers, transport clerks, receptionists, bricklayers, and motor vehicle mechanics (Figure 9). This somewhat mirrors jobs created under new recruitments which was discussed in the previous section. One can assume that owing to more demand for these occupations there is a greater mobility of labor because there are more opportunities for them to switch jobs.

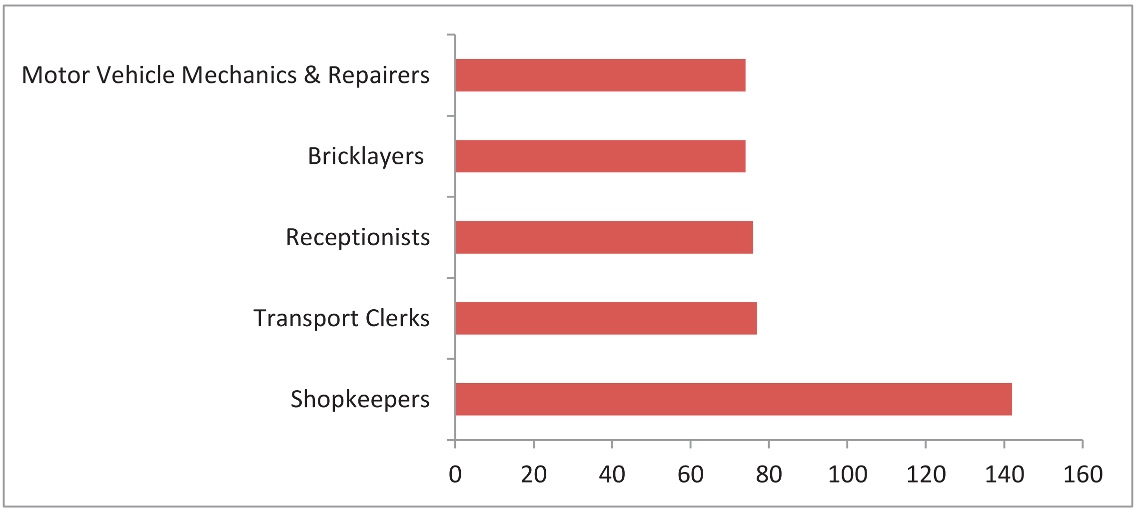

Figure 9: Number of employee exits by top five occupations

2.4 Future Hiring

To get a sense of present demand for workers, the enterprises were asked about their current vacancies by occupations. A small number (11.4%) of businesses had vacancies at the time of interviews. The objective here is to highlight the types of skills and occupations that enterprises are actively searching to fill and not necessarily calculate precise number of job vacancies extrapolated at the national level owing to issues in sampling.

Among those firms that are looking for staff, the top five occupations in terms of available vacancies are shown in Table 2. Job vacancies include heavy truck and lorry drivers, electricians, pharmaceutical technicians, midwifery associate professionals, and motor vehicle mechanics.

1	Heavy Truck & Lorry Drivers
2	Electrical Mechanics & Fitters
3	Pharmaceutical Technicians & Assistants
4	Midwifery Associate Professionals
5	Motor Vehicle Mechanics & Repairers

Table 2: Highest vacancies by occupations

In Table 3 we can see the occupations that are proving hard to fill for the enterprises. The top five occupations that are most difficult to fill include pharmaceutical technicians, midwifery professional, drivers, electrical engineering technicians, and motor vehicle mechanics.

1	Pharmaceutical Technicians & Assistants
2	Midwifery Associate Professionals
3	Car, Van And Motorcycle Drivers
4	Electrical Engineering Technicians
5	Motor Vehicle Mechanics & Repairers

Table 3: Hard to fill occupations

Overall, businesses that are finding it hard to fill certain positions recognize that this is affecting the performance of their enterprises (Table 4). The businesses see the implication for not being able to fill these positions resulting mainly in increased workload for other staff (33.3%), delay in developing new products and services (21.2%), and losing business orders (18.2%).

Implications	Percent
Increase workload for other staff	33.3
Delay developing new products or services	21.2
Lose business or orders to competitors	18.2
Have difficulties meeting customer services objectives	12.1
Outsource work to other companies	9.1
Withdraw from offering certain products or services altogether	6.1

Table 4: Impact from hard to fill vacancies

Around 78% of the businesses do not expect that there will be any change in the number of workers during the next 12 months (Figure 10). A small number (3%) of enterprises expect that the number of their employees may decrease. Less than a quarter (19%) of the businesses are anticipating that their employees will increase.

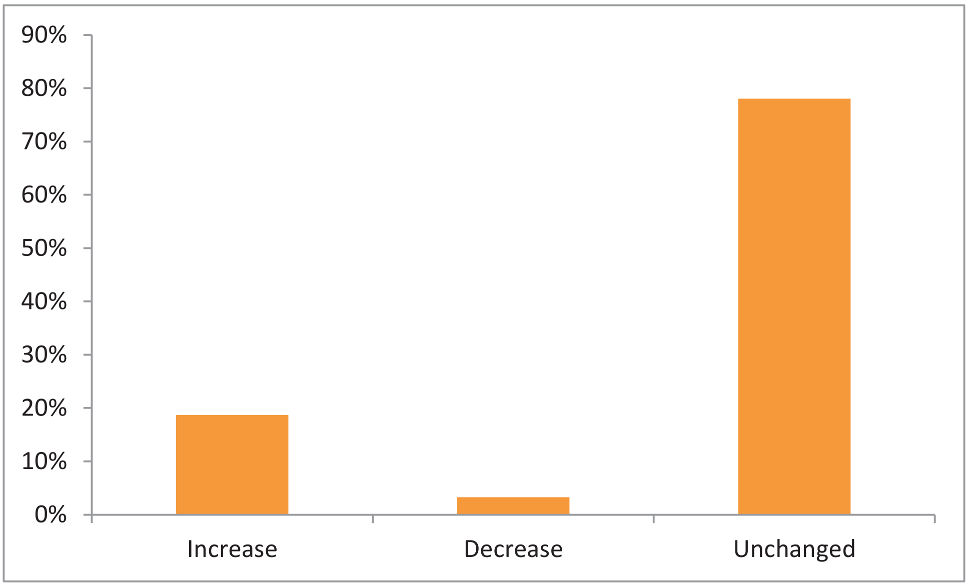

Figure 10: Expected change in employees

Table 5 shows the list of occupations that firms consider will likely expand the most in the coming twelve months. The top five occupations that businesses expect will increase include motor vehicle mechanics, concrete placers, construction supervisors, mechanical engineering technicians, and business managers. The type of positions that employers are expecting to recruit seems to underline that enterprises foresee further growth of construction and service sectors in the economy.

1	**Motor Vehicle Mechanics & Repairers**
2	**Concrete Placers, Concrete Finishers & Related Workers**
3	**Construction Supervisors**
4	**Mechanical Engineering Technicians**
5	**Business Services & Administration Managers**

Table 5: Expected increase in employees by occupations

2.5 Skill Gaps & Workforce Training

The survey results on training show that a large number of companies (92.8%) consider their staff to be performing at the required level. The overwhelmingly positive assessment of employee performance is somewhat contrary to what one gathers from various discussions on skills development and training for staff. Part of the reason could be the way the question was formulated. Under Section C (Recruitment) enterprises did note that several of the first time job seekers were not performing at the required level. The collected data does not allow us to disaggregate the workers who had no prior job experience and those who had experience. That would have given some additional insights to validate responses related to performance assessment of workers.

A majority of the employees are not getting any training that is partially or fully sponsored by the company. Only a quarter of businesses provide training to their staff. In the interview the respondents were not asked whether they considered training necessary or reasons for not providing training to their staff. The questionnaire was designed, to the extent possible, to capture data on actual practices rather than seek opinions from respondents. This did create some limitations to assess training priorities. However, an even bigger problem faced was that several questions under this section were not answered by the respondents.

The enterprises that provide training were asked to specify the type of training that they have supported for employees (Figure 11). Training provided by enterprises to their employees mainly focused on orientation when recruiting new staff (39.3%). After being in the job for some time, training for the staff mainly focuses on management and administration (27.4%), information management (21.4%) and language skills (11.9%). It appears that not much emphasis is given to continuous learning and improving productivity of employees. Almost half of the enterprises (46.4%) provide no training to their staff. In future surveys, performance and skills level of existing employees and the relationship with training needs to be further examined either through a specific survey or through qualitative means such as consultative forums with business representatives.

[8] For more details about budget and expenditure refer to Ministry of Finance Budget Portal.
http://budgettransparency.gov.tl/public/index?&lang=en

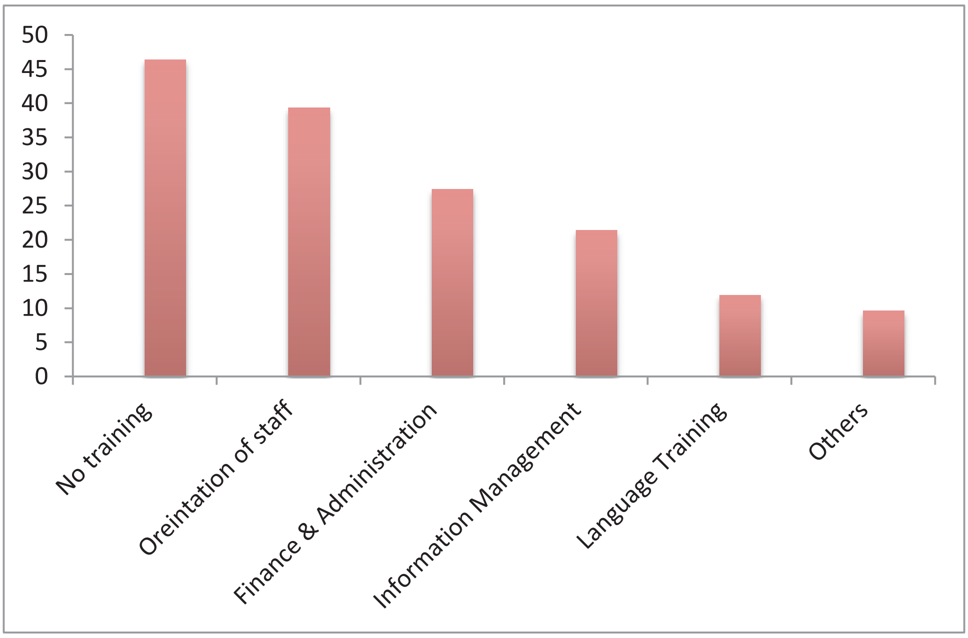

Figure 11: Type of training provided to staff by enterprises (%)

Section 3: Conclusions & Recommendations

Being the second enterprise survey that has looked into skills formation and employment, the ESS 2014 provides a number of interesting findings. The survey seems to confirm some of the broad patterns that were identified during ESS 2013 in terms of employment growth and demand for skills in construction and services. The use of a questionnaire that looks into a range of dimensions related to occupations, gaps and demand for skills, and training helped getting better insights into the labour market situation.

The private sector in Timor-Leste has a concentration of what can be described as small enterprises. Based on results from ESS 2013, an attempt was made in ESS 2014 to target formal and relatively larger businesses. The sample was randomly drawn from the list of businesses in selected sectors that have a tax identification number. Even then, around 73% of the enterprises are what are classified as “single shareholder” company (Unipessoal Lda) in Timor-Leste. On an average enterprises targeted in this survey are employing 13 workers. More than half of the enterprises are owned by Timorese nationals. A significant number of Indonesian (17.8%) and Chinese (9.7%) owned companies are also present.

Between 2011 and 2013 the number of employees increased by 13.8%. The increase in the number of employees was even higher (23.4%) for the period 2012-2013. In 2012 there was in fact a decrease (-8%) in the total number of workers employed. Perhaps it mirrors slower growth in non-oil GDP which fell from 13.2% in 2011 to 5.5% in 2012. In 2013 there was a significant increase in the number employees. As GDP figures from 2013 are not available as of writing of this report, it is difficult to say how closely employment is synchronized with the decrease and expansion of the economy.

Between 2011 and 2013 the number of employees working in sale and services increased by 76%. Although less pronounced, the number of associate professionals also increased significantly (36%) during the same period. This evidence seems reflect the ongoing structural changes in the economy including growth of the services and construction sectors. The growth is creating more jobs, but many of these jobs are at the low end of occupational ladder in terms of specialization and skills.

In 2013, close to 40% of the managers and 30% of the professionals in the targeted enterprise were foreign nationals. Such a high percentage of foreign nationals working as managers and professionals possibly suggest skills gaps. It is likely that labour with required skills needed for managerial and professional positions are in short supply. The data from the Labour Force Survey 2013 also underlines the short supply of workforce with advanced skills. Almost 86% of the labour force has completed secondary or primary school education.

Around 40% of the enterprises interviewed had hired new staff. The recruitment pattern shows a distinct demand for jobs in the construction and services. Shopkeepers, motor vehicle mechanics, receptionists and secretaries, bartenders, bricklayers, to name a few, are occupations that have shown a consistent demand. These are occupations that also show higher turnover.

With regards to vacancies, enterprises are mainly looking for truck drivers, electricians, pharmaceutical and midwifery associates, and motor vehicle mechanics. These are also occupations that enterprises cited as difficult to hire. Not being able to find people with the required competencies is affecting the businesses in several ways: increasing workload for other staff, not being able to develop new products and services, and in some cases losing business orders.

While recruitments - past and current- were based on actual practices, enterprises were also asked about their future plans for hiring. The purpose was to understand if businesses are anticipating growth or contraction in near future. Enterprises expect to hire more motor vehicle mechanics, construction supervisors, mechanical engineering technicians, and business managers. It appears that businesses anticipate expansion in the services and construction sectors will continue. In 2012 the construction sector in fact shrunk by -6.6% and some of the sub-sectors in the service industry such as professional and technical services also contracted by -1.5%. It will be interesting to see if the optimism of enterprises that growth in construction and services will continue is "justified" once the data from the national accounts for 2013 and 2014 becomes available.

The skills gaps clearly present an opportunity for more public investments in training and education of the workforce. There are skills gaps across all the occupational categories. On one hand there is a relatively high percentage of foreign workers in managerial and professional level positions while on the other hand enterprises are finding it difficult to fill positions at various levels ranging from professionals to crafts and trades workers.

It is however important to note that supply of skills needed to meet market demand cannot be increased overnight. Investments in education and training will invariably take much longer to show results. For instance, even technician level occupations require one or two years of training either as part of a formal course or an apprenticeship before a person can acquire an acceptable competency level. Preparing the Timorese workforce for jobs that require more advanced skills sets and experience such as managers and professions will undoubtedly require a longer-term strategy and financing that is sufficient and predictable. In this regard, the government can consider "ring-fencing" funds for technical and vocational training to ensure that training providers have the resources to increase their outreach.

Survey cannot be treated as a "crystal ball" that can predict the future. The results are indicative of a trend and one cannot assume that these trends will keep repeating. Nonetheless, one of the key messages from ESS 2014 is that there is employment growth, but at the same time there is shortage of skills. A policy question therefore is whether there is a tradeoff if more investment in education and training is made now, especially when the country faces so many development challenges? The answer to this policy dilemma lies in how policy- makers define development. If education and training is seen as means to achieve a higher goal- perhaps very high economic growth- then cost-benefit analysis that excludes social benefits should guide funding choices. But, if education and training are seen as means to enlarge choices of individuals and promote human development then clearly there is less tradeoff.

Section 4: Annexes

Annex 1: References

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Annex 2 Survey Questionnaire

General Information

1. Name of the enterprise:____

2. Address of the enterprise:____

Suco |______________________________|District|______________________________|

3. Is this a branch or the main office:

A. Main office:

B. Branch office:

Personal Details of the contact person:

4. Name of the contact person:_______________ 5. Position of contact person:_____________

6. Contact person's tel. no:____________________ 7. Tel. no. Office:___________________

8. Contact person (email):____

Personal Details of the interviewed person:

9. Name of the interviewee (if different from contact person):_______________________

10. Position of the interviewee (if different from contact person):____________________

11. Interviewee phone no.:____________________ 12. Interviewee's office tel. no.:_________

Section A – Enterprise Profile

A.1. When did your enterprise start business? Month: |__|__| Year: |__|__|__|__|

A.2. Is your company registered with the Ministry of Commerce and Industry or Ministry of Justice ?

1- Yes, Registered ☐ 2- No, Not registered ☐

A.3. The company/enterprise is a/an:

Individual proprietorship	
General partnership	
Private limited company	
Subsidiary of a foreign company	
Branch of a foreign company	
Cooperative	
Non-Governmental Organization	

A.4. The enterprise is owned by

1. Timorese
2. Foreigner (Please specify nationality)|________________________|
3. Others |______________________|

A.5. What are the main goods or services produced at your enterprise or its main functions?

____ ISIC Code |__|__|__|__|

Section B – Employee Profile

B.1. Could you please indicate the number of wage and salary employees - excluding family workers who do not receive regular wage or salary - in each occupation at each of the following dates ***(employees with more than one occupation should be classified in the main one and write 0 for occupation not applicable in your company)***

Occupation (by major group)	2011			2012			2013 (Current)		
	Total A	Female B	Expatriate C	Total A	Female B	Expatriate C	Total A	Female B	Expatriate C
1 Managers									
2 Professionals									
3 Associate professionals									
4 Service and sale workers									
5 Clerical support workers									
6 Skilled agricultural, forestry and fishery workers									
7 Craft and related trades workers									
8 Plant and machine operators and assemblers									
9 Elementary occupations									
10 Total									

B.2. Are there any family members working in the business who do not receive regular wage or salary

1. No |____|

2. Yes, Number |_____|

B.3. Could you please indicate how many wage and salary employees - excluding family workers who do not receive regular wage or salary - in each of the following major occupational groups, their status, and average monthly salaries before tax or other social security deductions. *(In case of more than one occupation, choose the main one)*

Occupation categories	A No of employees (permanent) (skip B)	B No of employees (temporary)	C No of employees with written contracts	D Working hours "usually" worked per day	E Days "usually" worked per week	F Average hourly wage (USD)	G Average wage & salary (USD per month)
1 Managers *(This category includes chief executives; general and corporate managers, managing director; administrative, finance, production, service and sale manager; and regional and branch manager who plan, direct and coordinate the policies and activities of business and other organization)*							
2 Professionals *(Professionals increase the existing of knowledge, apply scientific or artistic concepts and theories, or teach in a systematic manner. Most occupations in this category - such as engineers, lawyers, economists, computing professionals, teachers and health professionals - require skills at graduate and postgraduate education)*							
3 Technicians and associate professionals *(This category performs mostly technical and related tasks connect with research and application of scientific, artistic, or operational methods. These occupations, which typically require skills at upper secondary or tertiary education, include industrial robot controllers, photographers and medical assistants)*							
4 Clerical support workers *(This category performs clerical duties with associated with money handling operations, travel arrangements, requests for information and arrangement. Most of these jobs, such as secretaries, cashiers, or transport clerks, require skills at least lower secondary educations)*							
5 Service and sale workers *(This category provides personal services related to travel, housekeeping, catering, personal care, or protection, or they demonstrate and sell goods. Most occupations require skills at least lower secondary education)*							
6 Skilled agricultural, forestry, and fishery workers *(This group includes occupations that require skills at least secondary education or equivalent critical skills and knowledge such as crop growers, gardeners and dairy and livestock producers)*							
7 Craft and related trades workers *(This group applies their skills in the fields of mining and construction, making or repairing machinery, printing, processed food, textiles, or articles including handicrafts goods which involve the performance of complex physical duties that normally involve initiative, manual dexterity and other practical skills. Most of these occupations, such as builders, bricklayers, plumbers, or electronic mechanics require a substantial period of training)*							
8 Plant and machine operators and assemblers *(This group operates and monitors industrial and agricultural machinery and equipment, drives and operates motor vehicles and mobile machinery, or assembles products. Most occupations have not a particular standard of education but will usually have formal experience related training)*							
9 Elementary occupations *(This group consists of simple and routine tasks that mainly require the use of hand tools plus physical effort. Most occupations in this group, such as cleaners, building caretakers, doorkeepers or labourers do not require formal education qualification).*							
TOTAL							

Section C – Recruitment / Recruitment Difficulties

C.1. In the last 3 years, has your company filled any permanent or temporary positions?

Yes	1	**Go to C.2**
No	2	**Go to C. 7**
I don't know	3	**Go to C.7**

C.2. Could you please, indicate the occupations (up to a maximum of five) in which your company has hired the most employees and the total number of employees in the following periods *(in the case of people having been hired for more than one occupation, please choose the main one)*

Occupation (List up to five occupations) (ISCO-88 Code)	**Approximate number of employees hired**								
	01/01/2011 to 31/12/2011			**01/01/2012 to 31/12/2012**			**01/01/2013 to Present**		
	Total A	**Female B**	**Expats C**	**Total A**	**Female B**	**Expats C**	**Total A**	**Female B**	**Expats C**
1.									
2.									
3.									
4.									
5.									
Total									

C.3. In the last 3 years has your company hired any first time job seekers that were leaving secondary school; technical and vocational schools; or university?

Yes	1	**Go to C.4**
No	2	**Go to C.7**

C.4. Have any of them been....

	Yes	**No**
A First job seekers coming from secondary school		
B First job seekers coming from technical and vocational school		
C. First job seekers coming from university or other higher education institution		

FOR EACH YES ANSWER IN C.4, GO TO C.5

C.5. How well were they prepared for work for each category?

	Very well prepared	Well prepared	Prepared	Poorly prepared	Very poorly prepared
A First job seekers coming from secondary school					
B First job seekers coming from technical and vocational school					
C First job seekers coming from University or other Higher Education institution					

IF THE PREPARATION FOR WORK OF THE NEWLY HIRED WAS EVALUATED 4 OR 5, GO TO C.6.

C.6. In which of the following areas was the preparation of the newly hired employees lacking *(you can select all relevant fields for each group)* :

	First time job seekers coming from secondary school	First time job seekers coming from technical and vocational school	First time job seekers coming from University or other Higher Education institution
A Lack of job specific required skills or competencies (e.g. technical or job specific skills, IT skills, problem solving skills, team working skills)			
B Limited basic education (literacy & numeracy)			
C Poor attitude / personality or lack of motivation (e.g. poor work ethic, punctuality, appearance, manners)			
D Lack of work /life experience or maturity (including general knowledge & common sense)			
E Other (Please specify______________________________)			

C.7. In the last 3 years, have any employees left your company? (Both permanent and temporary positions)

Yes	1	**Go to C.8**
No	2	**Go to C.9**

C.8. Could you please indicate the occupations (up to a maximum of five) that have registered the highest number of exits and the total number of exits in the following periods

Occupation (List up to five occupations) (ISCO-88 Code)	Approximate number of employees hired								
	01/01/2011 to 31/12/2011			01/01/2012 to 31/12/2012			01/01/2012 to Present		
	Total A	Female B	Expats C	Total A	Female B	Expats C	Total A	Female B	Expats C
1.									
2.									
3.									
4.									
5.									
Total									

C.9. At the moment do you have any vacancies?

Yes (Number of vacancies______________)	1	**Go to C.10**
No	2	**Go to D.1**

C.10. Could you please tell us in which occupations do you have the most vacancies *(please list up to five occupations)***:**

Occupation (ISCO-88 Code)	**Approximate number of vacancies**
A Occupation 1:	
B Occupation 2:	
C Occupation 3:	
D Occupation 4	
E Occupation 5:	

C.11. Are any vacancies proving hard to fill?

Yes	1	**Go to C.12**
No	2	**Go to D.1**

C.12. Could you please indicate how many vacancies are proving hard-to-fill? *(Up to five occupations)*

Occupation	Approximate number of hard-to-fill vacancies
A Occupation 1:	
B Occupation 2:	
C Occupation 3:	
D Occupation 4:	
E Occupation 5:	

C.13. For each of the previous occupations, could you please indicate the reasons why they are hard to fill ?
(You can select all relevant reasons for each occupation)

Reasons	Occupations with hard-to-fill vacancies				
	Occ A	Occ B	Occ C	Occ D	Occ E
1 Too much competition from other employers					
2 Not enough people interested in doing this type of job					
3 Poor terms and conditions (e.g. pay) offered for post					
4 Salaries/payments demanded for this occupation are too high					
5 Low number of applicants qualified for the job					
6 Job entails shift work / unsociable hours					
7 Seasonal or timely limited work					
8 Remote location / poor public transport					
9 Others					

C.14. Are hard-to-fill vacancies causing this enterprise to… *(You can select all relevant answers)*

Effects on business	
Lose business or orders to competitors	
Delay developing new products or services	
Increase workload for other staff	
Outsource work to other companies	
Withdraw from offering certain products orservices altogether	
Have difficulties meeting customer services objectives	
None	

Section D – Future Hiring

D.1. Do you think the number of people working in your company will increase, decrease, or remain the same in the next 12 months?

Increase (How many? __________________)	1	**Go to D.2**
Decrease (How many? ________________)	2	**Go to E.1**
Remain same	3	**Go to E.1**

D.2. Could you please indicate the occupations (if any) that will register the highest increase in the number of job positions in the next 12 months *(Please indicate up to five occupations).*

Occupation **(ISCO-88 Code)**	**Number of additional job positions in the next 12 months**
1.	
2.	
3.	
4.	
5.	

Section E – Skills Gaps and Workforce Training

E.1. For each occupation, do you have problem related to your employees who do not perform jobs at the required level?

Yes	1	**Go to E.2**
No	2	**Go to E.5**

E.2. Could you please indicate in which occupations the problem is more severe and approximate proportion of people who do not perform jobs at the required level? *(List up to 5 occupations in order of severity of the problem)*

Occupations	**Approximate proportion of people do not perform jobs at the required level**				
	[100%-80%]	**[80%-60%]**	**[60%-40%]**	**[40%-20%]**	**[20%-0%]**
A:________________________					
B:________________________					
C:________________________					
D:________________________					
E:________________________					

E.3. Among your employees who are not able to do their jobs at the required level, which, if any, of the following skills need to be improved?
(Select up to five skills for each occupation)

Skills	Occupations				
	Occ A	**Occ B**	**Occ 3**	**Occ 4**	**Occ 5**
Literacy					
Numeracy					
IT literacy / using IT					
Advanced IT application / development					
Oral communication					
Written communication					
Public speaking /instructing / training					
Customer handling					
Team working					
Taking initiative					
Knowledge of a foreign language					
Planning and organizing					
Management responsibilities /taking a lead					
Manual dexterity					
Clerical / administrative tasks					
Other job-specific tasks(__________________________)					

E.4 Last year, did your employees participate in any external or internal training courses, completely or partially financed by the company?

Yes	1	**Go to E.6**
No	2	**Go to E.**

E.5 In which areas did your company finance the training?

Training fields	
Induction training	
Occupational health and safety	
Literacy / numeracy	
Foreign language	
IT training	
Management and administration (including human resource management and quality management)	
Training in new technology / new product or service	
Environmental protection	
Accounting and finance	
Any other types? (Specify_______________________________)	

E.6. In future list the training your company is planning to provide to your staff? *(Please list up to five in order of importance)*

Training Topic
A.
B.
C.
D.
E.

Thank you very much for taking your time to answer all the questions!