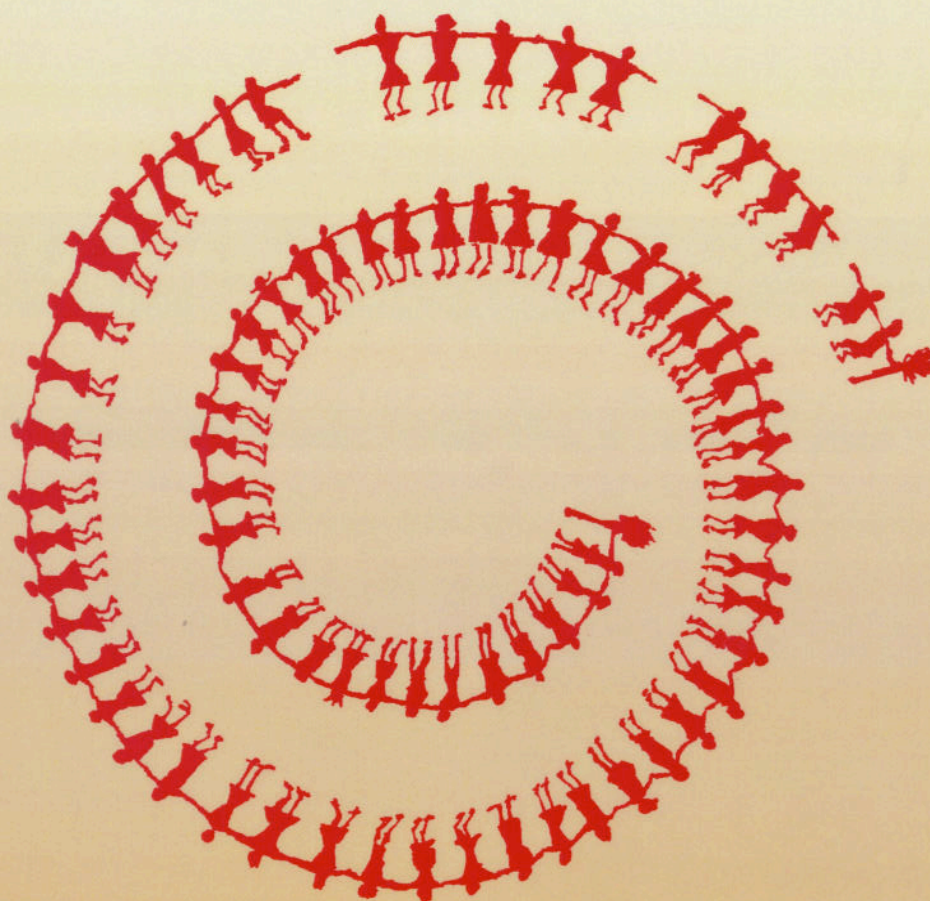


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South Asia Human Development Sector  
**Sindh Employer's Survey 2010**

62150

April 2011



**Report No. 34**

**South Asia Human Development Sector**

# **Sindh Employer's Survey 2010**

**April 2011**

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## **Discussion Paper Series**

*Edited by Islam Hamid, Saori Imaizumi, and Andreas Blom and based upon work from Karachi Chamber of Commerce and Industry, Benazir Bhutto Shaheed Youth Development Program, Sindh Technical Education and Vocational Training Authority and University of Karachi.*

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## **ABBREVIATIONS**

BBSYDP	Benazir Bhutto Shaheed Youth Development Program
KCCI	Karachi Chamber of Commerce and Industry
OJT	On-the-Job Training
STEVTA	Sindh Technical Education and Vocational Training Authority
TNA	Training Need Assessment

## **ACKNOWLEDGEMENT**

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## **ABSTRACT**

Although some progress has been made in the basic education sector in Pakistan, currently, less than 1% of the population aged 10 years and above is trained in occupational skills. This situation could be improved through an identification of employment opportunities, a provision of appropriate training, promotion of effective employment policy from the government, and a stronger linkage between those who are trained and a labor market. In order to identify what, when and where training and skills are needed and how skills are imparted, this paper analyses the results of the employer survey conducted in November 2009 towards 1,000 selected enterprises. The results of the survey will provide various benchmarks which can be used over time to: (i) measure how STEVTA and BBSYDP can improve existing program outcomes, and (ii) to monitor changes in labor market demand so that STEVTA and BBSYDP can shift resources appropriately. We conclude this paper with eight findings and recommendations: (i) rising demand for skills indicates the need for skills program, (ii) need for training of specific skills such as on-the-job training and communication skills, (iii) need for specific trainings for occupations demanded, (iv) improved employment prospects, (v) trainees' need for direct contacts to firms and preparation for interviews, (vi) need for an increase in visibility of BBSYDP, (vii) need for a reform in public institutions, and (viii) current focus of firm's internal trainings on educated and skilled employees.

## 1. Introduction

The root of the Employer's Survey is the gap analysis. This is an assessment of the gap between the knowledge, skills and attitudes that the people in the organization possess and those which are required to meet the organization's objectives. The survey has been conducted to develop close coordination between industry and academia so that more informative Training Need Assessment (TNA) followed by On-the-Job Training (OJT) will become possible. Moreover, this survey results can inform the employers about the availability of BBSYDP and STEVTA graduates. The results of the survey provide a number of benchmarks which can be used over time to: (i) measure how STEVTA and BBSYDP can improve existing program outcomes, and (ii) to monitor changes in labor market demand so that STEVTA and BBSYDP can shift resources appropriately.

The survey was designed with the World Bank team and representatives of Karachi Chamber of Commerce and Industry (KCCI), Sindh Technical Education and Vocational Training Authority (STEVTA), Benazir Bhutto Shaheed Youth Development Program (BBSYDP) and selected group of other agencies with active participation of academicians and consultants under the patronization of Dr. Islam Hamid.

### 1.1.Objectives of the Survey

The overall goal of the survey was to bring the employers on board and gather their input to develop recommendations and disseminate outcomes to the provincial governments, stakeholders, universities, and other field of employment and training particularly to:

- i. Explore and identify employment opportunities and recommend reform for training program accordingly;
- ii. Point out strength, weakness and effectiveness of the training program;
- iii. Create coherence between employment demand and supply in a way that BBSYDP graduates may get maximum benefits and employers can fulfill their demands to their needs;
- iv. Improve productivity in the economy;
- v. Improve the employment of BBSYDP/STEVTA Graduates;
- vi. Look into the roadmap to promote more effective governmental policy in the sphere of employment;
- vii. Improve the structure and content of vocational and technical training programs and
- viii. Elaborate and introduce new programs that would meet the ongoing demand of public and private employers.

The survey was designed, conducted and delivered. The outcomes of the survey summarized in this report will answer the following questions:

- i. Why do people need the training?
- ii. What skills need imparting?
- iii. When will they need the new skills?



- iv. Where the training may will be conducted?
- v. How may the new skills be imparted?

## 1.2.General Survey Procedures

The employer survey is an important effort which provides a great deal of information to analyze the real facts of employment status of the job market. The survey identified and documented information from employers to assess the occupations which are having potential, gaps and turnover. The survey was designed, implemented and carried out through well trained energetic youth enumerators and was supervised by a professional team of Pakistani and international consultants, with the support and guidance of the World Bank and an active participation by students of a highly recognized business management school and a public sector university.

### The Design of the Survey:

Well-designed questionnaire developed with the active assistance of the World Bank were circulated to 1,000 employers. Based on this review, refinements were made and agreement was reached that the survey would be implemented by interviews conducted by selected students that would be trained and supervised by KCCI consultant. A sample of 1,000 enterprises was selected and stratified by size of firms as small, medium and large. This model survey was in three languages (English, Urdu and Sindhi) and was mailed to enterprises through a list of members provided by Chambers of Commerce and Industries and Agriculture Chambers of Karachi, Hyderabad, Sukkur, Larkana, Shaheed Benazirabad etc., and appointments calls were made. Thereafter, the procedure for in-person review was adjusted.

## 2. Background

Despite the progress in the basic education sector in Pakistan in recent years, less than one quarter of the youth cohort graduates from secondary education and a meager 4% enters the higher education system. This translates to more than three quarters of the youth cohort exiting the education system with some foundational skills, but few or almost no marketable skills and facing severe difficulties finding employment as discussed below. With 21% of Pakistan's 173.51 million population in the 15-24 age range, this amounts to a significant education and training challenge. Currently, less than 1% of the population aged 10 years and above is trained in occupational skills. When it comes to women, the education and skill acquisition scenario is more dismal. Only 45% of females 10 years old and above have ever attended school and only 0.4% ever received TVET. In contrast, male literacy rate is 69% and 1.32% having ever received TVET. The age specific unemployment rate has increased over the last year and is the highest among 15-19 years old (9.5%), followed by 20-24 years old (7.3%). Developing the general, technical, and professional skills of youth, especially females, would position them better to obtain a job and a stable future. Further, it would enhance the supply of skilled labor.

At the request of Government of Sindh, the Bank is preparing a project to support the Government of Sindh in strengthening their short-term training program to improve the skill sets and employability of trainees. Second, the project will seek to pilot reforms of a selected set of training institutions and

strengthen management capacity of the TVET system in Sindh. The province of Sindh has a population of over 85 million, of which more than 1/2 is less than 30 years old. Through the project, the World Bank will invest US\$ 20 million into both short-term and institutional-based training for youth. The Benazir Bhutto Shaheen Youth Development Program (BBSYDP) and the Sindh Technical Education and Vocational Training Authority (STEVTA) are the government counterparts. BBSYDP trains around 50,000 young Sindhi every year through its program. STEVTA administers 238 training institutions across the province.

### 3. Descriptive Information of the Sample of Employers

The original goal of the survey was to cover 1,000 enterprises. Total employers reached were 1,122. The response rate was 88%. Due to various problems (such as economic instability, domestic turmoil etc.), some enterprises did not want to respond because of the fear of tax authorities, dissemination of data in the market etc. The number of enterprises contacted for the survey was well-over a thousand, however, only 988 enterprises complied out of which 68 were public limited companies, 134 were private limited companies, 614 sole proprietors, 136 having partnership, 20 association of persons, 7 government enterprises while 9 belong to the “other” category.

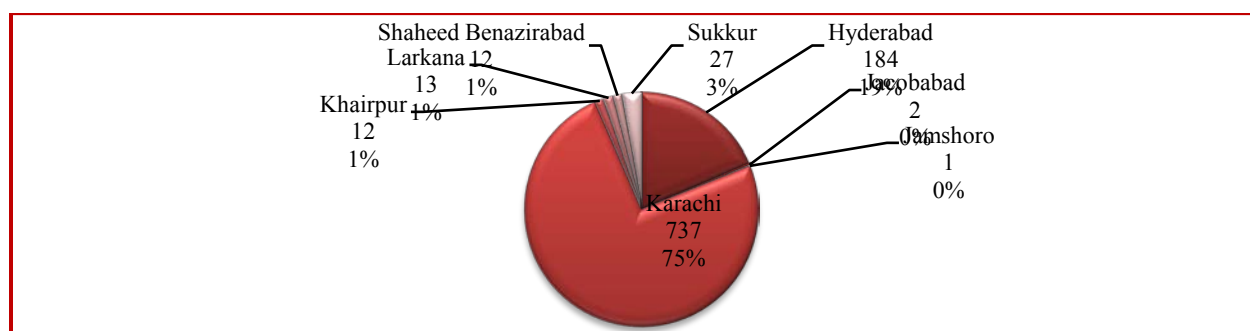
The enterprises represent a broad profile of sectors covering manufacturing, transportation and storage, information and communication, financial and insurance activities, real estate activities, wholesale and retail trade etc. as such the findings are likely to reflect broad labor force trends.

The conclusion of this survey should be handled with caution because of the small sample size. Sub group analysis i.e. by results or region, any authority or structure should be done with additional caution.

#### *Location of the Sample Population:*

988 companies responded to the surveys in total, of which 75% of the survey was conducted in Karachi (because it is the industrial hub of the province); 19% of the survey was conducted in Hyderabad; 3% in Sukkur; 1% each in Shaheed Benazirabad, Khairpur and Larkana; No survey was conducted in Jacobabad and Jamshoro.

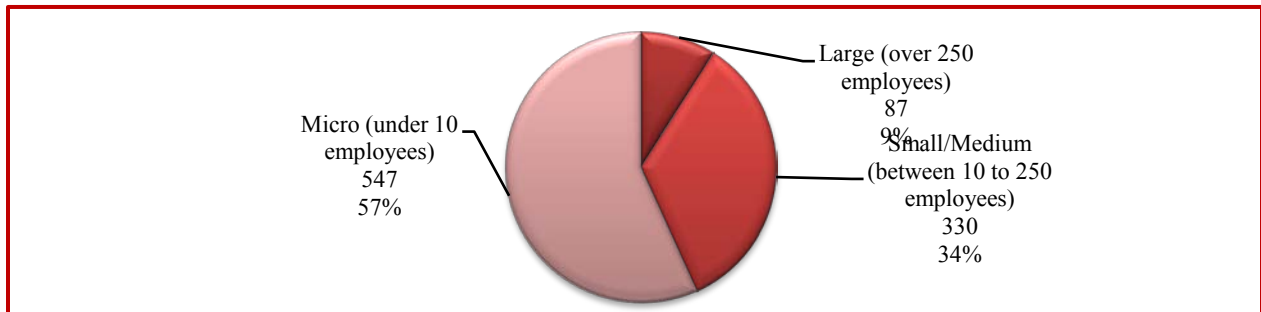
**Figure 1: District-wise Bifurcation of Surveyed Employers**



### *Scale of the Enterprises:*

The enterprises interviewed for the survey were mainly SMEs so that the scale of the business, which is measured by the number of total employees, is also small as shown below.

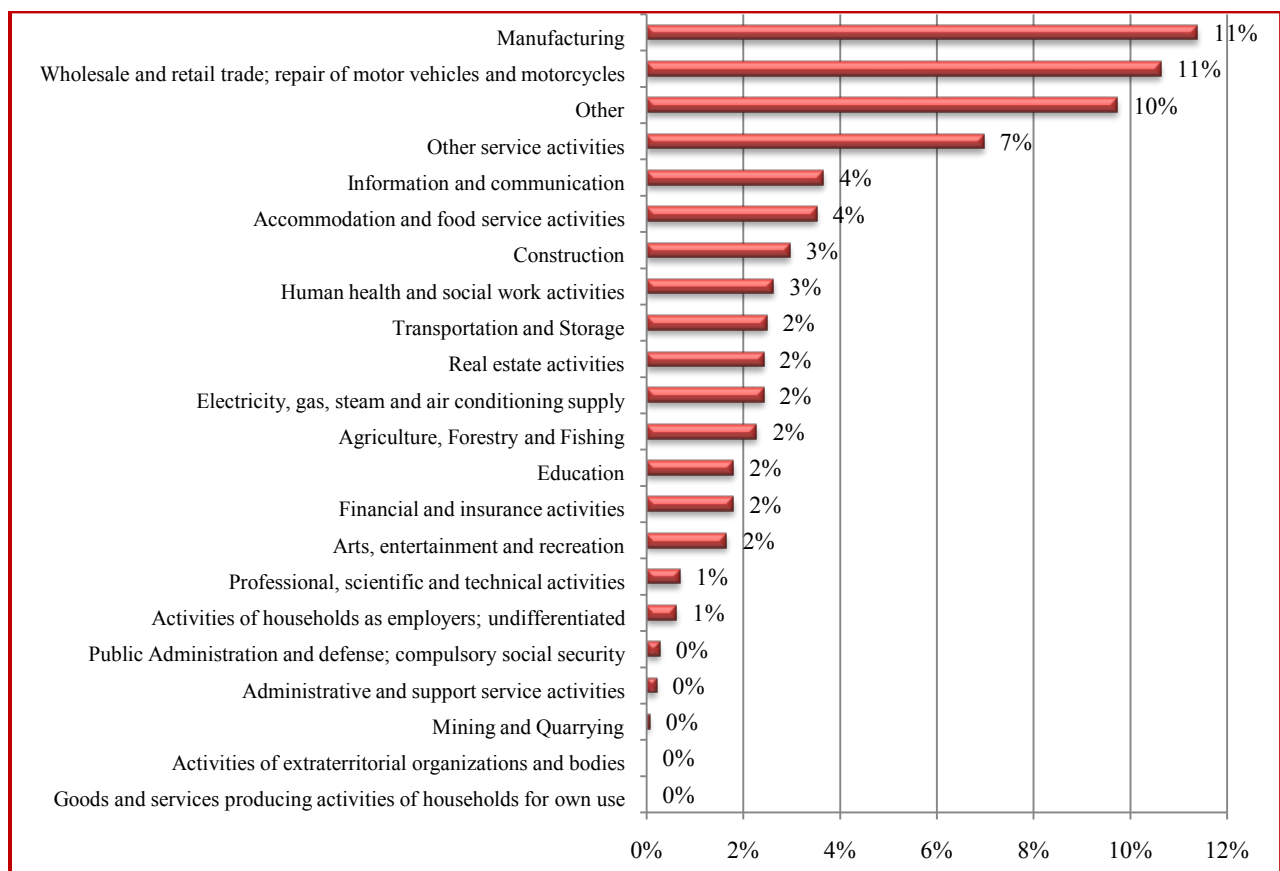
**Figure 2: Scale of Activity**



### *Industries of the Enterprises:*

The economic activities of the companies interviewed are summarized in order as presented below. The most represented activities are manufacturing (11%) and wholesale and retail trade, repair of motor vehicles and motorcycles (11%).

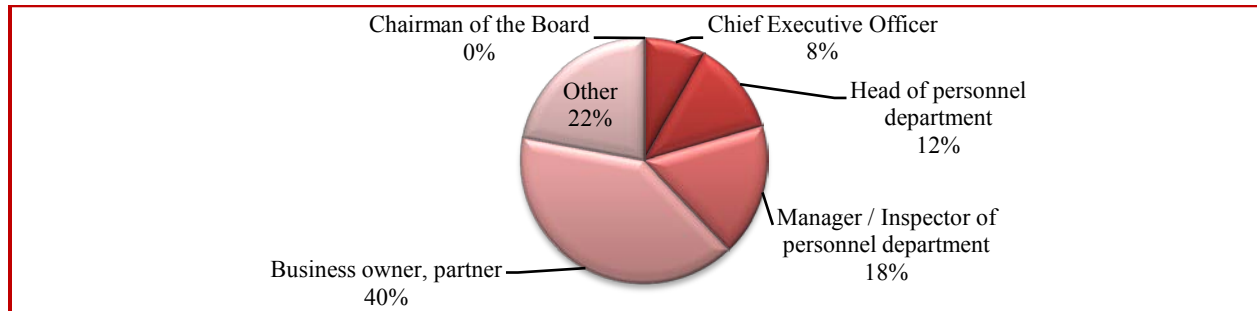
**Figure 3: Major Economic Activities**



#### *Job Title of Interviewees:*

The main sample population is those who are highly responsible and having hiring authority - 40% of the interviewees are business owners and partners; 18% belong to Managerial/Inspector of Personnel Department, and 12% are head of personnel department.

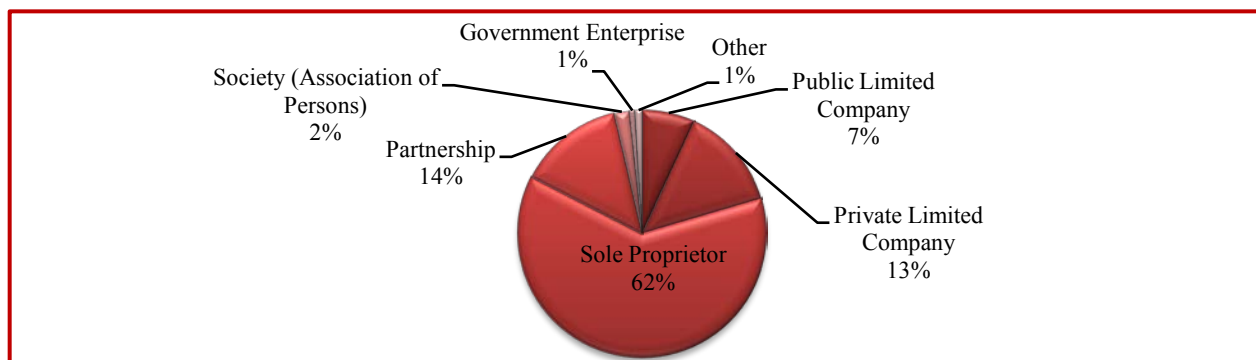
**Figure 4: Job Title of Interviewees**



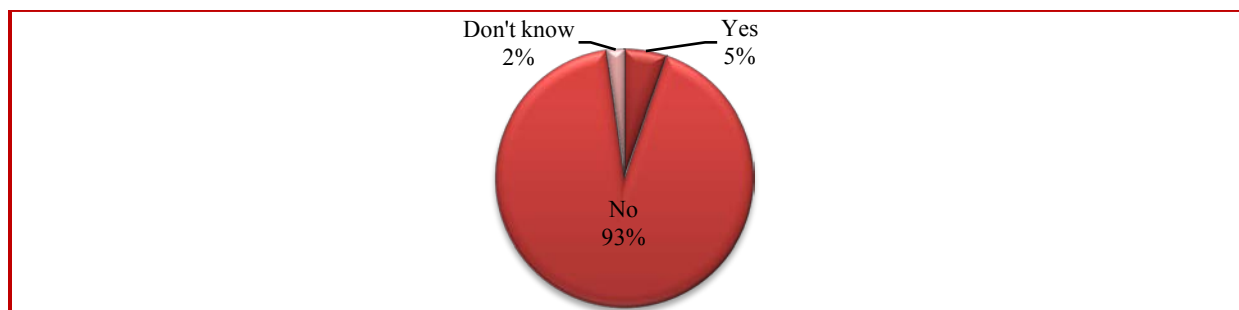
#### *Company Profile:*

The majority of the companies interviewed are small-medium enterprises (SMEs) -62% sole proprietorship and 14% partnership-. This is significant and important in the result of the survey as these firms generate the largest numbers of employment in Pakistan. In addition, only 5% of the enterprises participated in the survey are established with foreign equity, most of the companies are domestic (93%).

**Figure 5: Ownership Status**



**Figure 6: Proportion of Firms with Foreign Capital**



## 4. Results and Analysis of the Employer's Survey

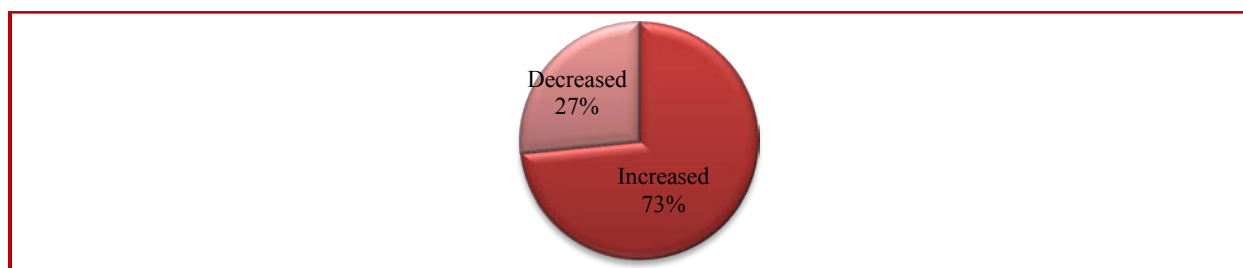
The results of the employer's survey are presented with analysis on (i) rising demand for skills, (ii) specific skills in demand, (iii) occupations in demand, (iv) shifts in employment demand, (v) shifts in employees' qualification, (vi) hiring methods, (vii) awareness of BBSYDP graduates, (viii) rating of technical and vocational training system, and (iv) internal training.

### 4.1. Rising Demand for Skills

In order to develop more focused skills development training programs for students, the survey assessed: (i) the trend of skill requirements and (ii) the type of skilled labors which are difficult to find.

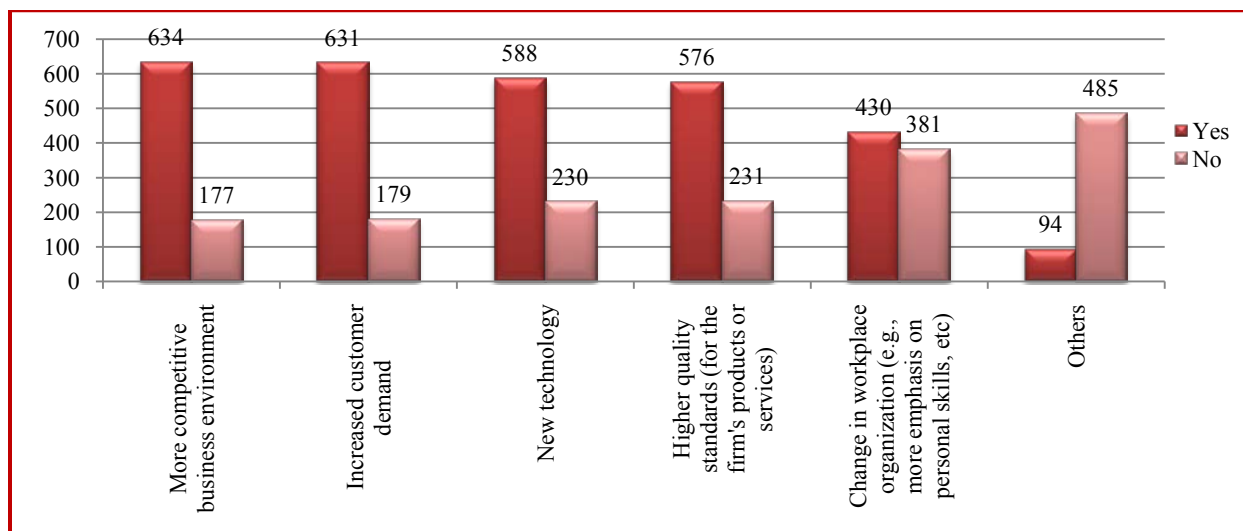
First, the survey results show that the skill requirements have been increasing over the last 2 years (November 2007-2009). This trend is most likely to continue, thus, a comprehensive skills development plan should be made to meet the future needs.

**Figure 7: Skill Requirements over the Last 2 Years**



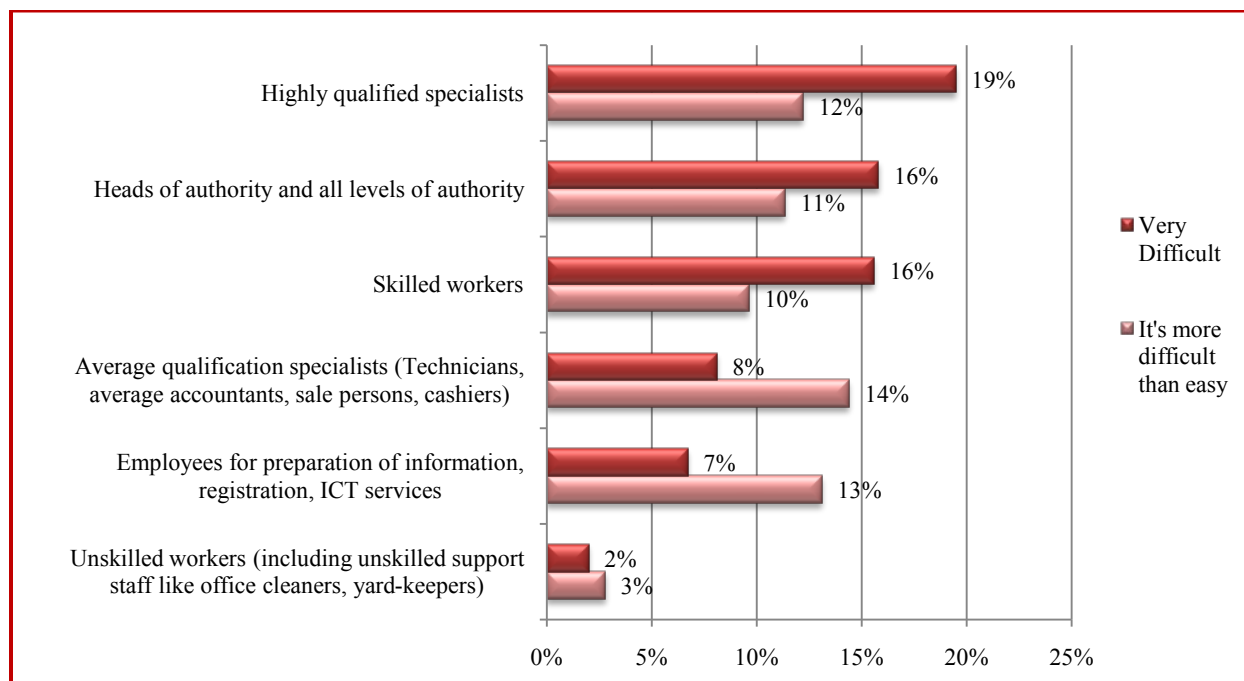
The reasons behind this trend are attributed to competitive business environment, increased customer demand and new technology as described in Figure 8.

**Figure 8: Reason for increase in skill requirements**



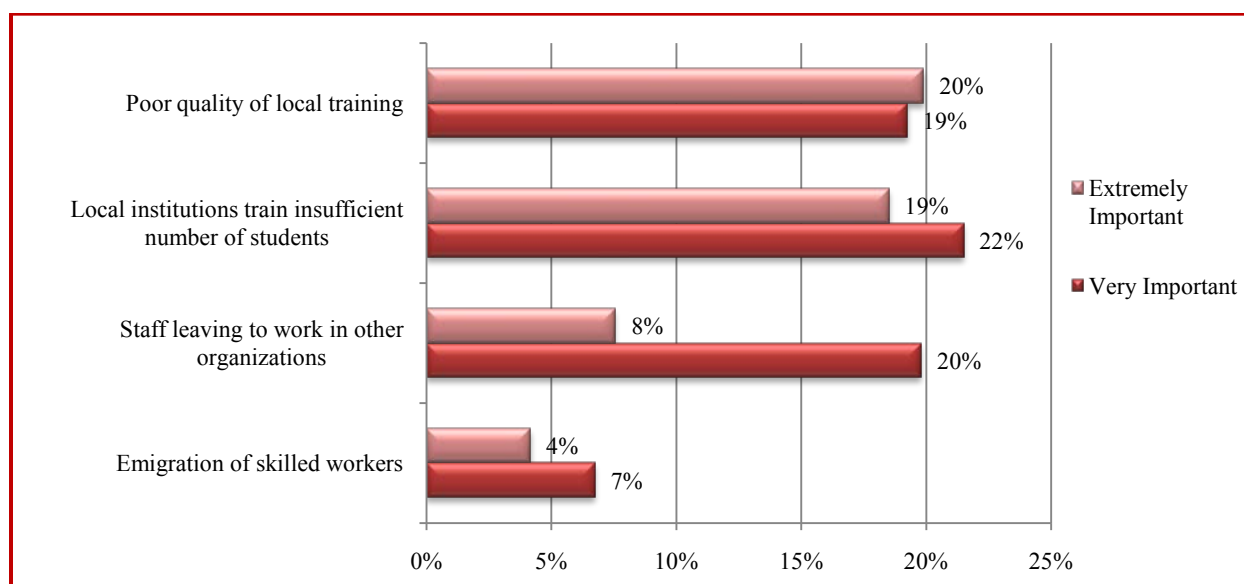
Second, the most difficult types of vacancies to fill were assessed. The results indicate that highly qualified specialists and skilled workers are difficult or very difficult to find. Also, the leadership positions such as heads of authority and all levels of authority are the positions which are difficult to fill.

**Figure 9: Difficulties in Finding Skilled Labor**



The survey further analyzed the cause of skill shortages. The result shows that major causes of skill shortage are a lack of high quality local training institutions both in quantity and quality.

**Figure 10: Causes of Skill Shortage**

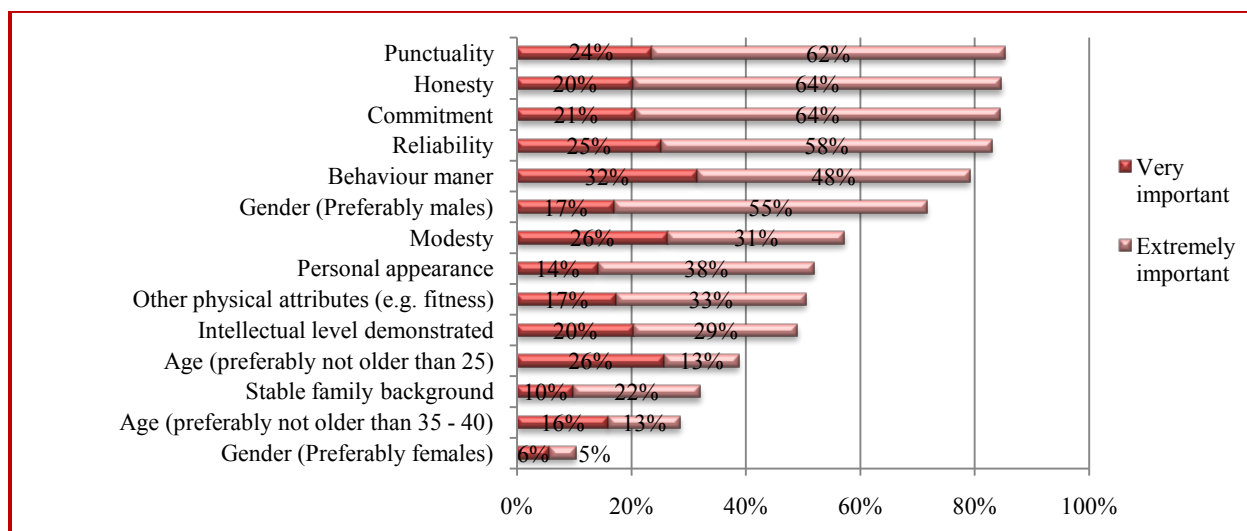


## 4.2. Specific Skills in Demand

The survey also analyzed the specific skills demanded. The survey assessed the importance of the characteristics that the firms look for in candidates from three aspects: (i) personal characteristics, (ii) basic skills, and (iii) academic qualifications and work experience.

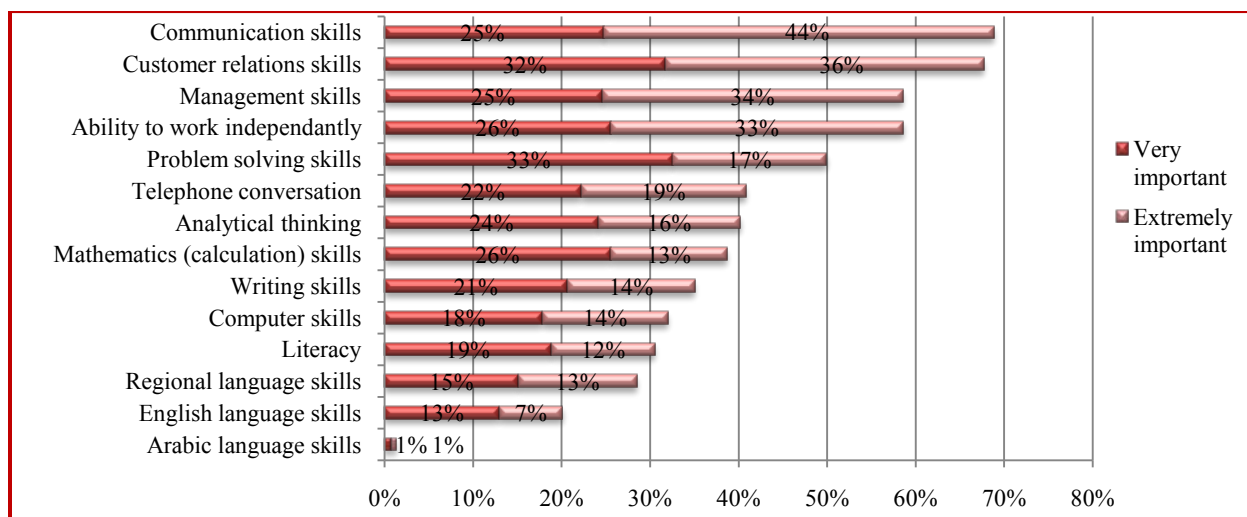
First, regarding personal characteristics, most of the firms in the survey clearly indicate honesty, commitment, punctuality, and reliability as extremely important. This is followed by gender preference and “good behavior and manners.” Interestingly, personal appearance and physical attributes also matter but the family background does not matter as much. A big proportion of gender preference is given to male.

**Figure11: Personal Characteristics**



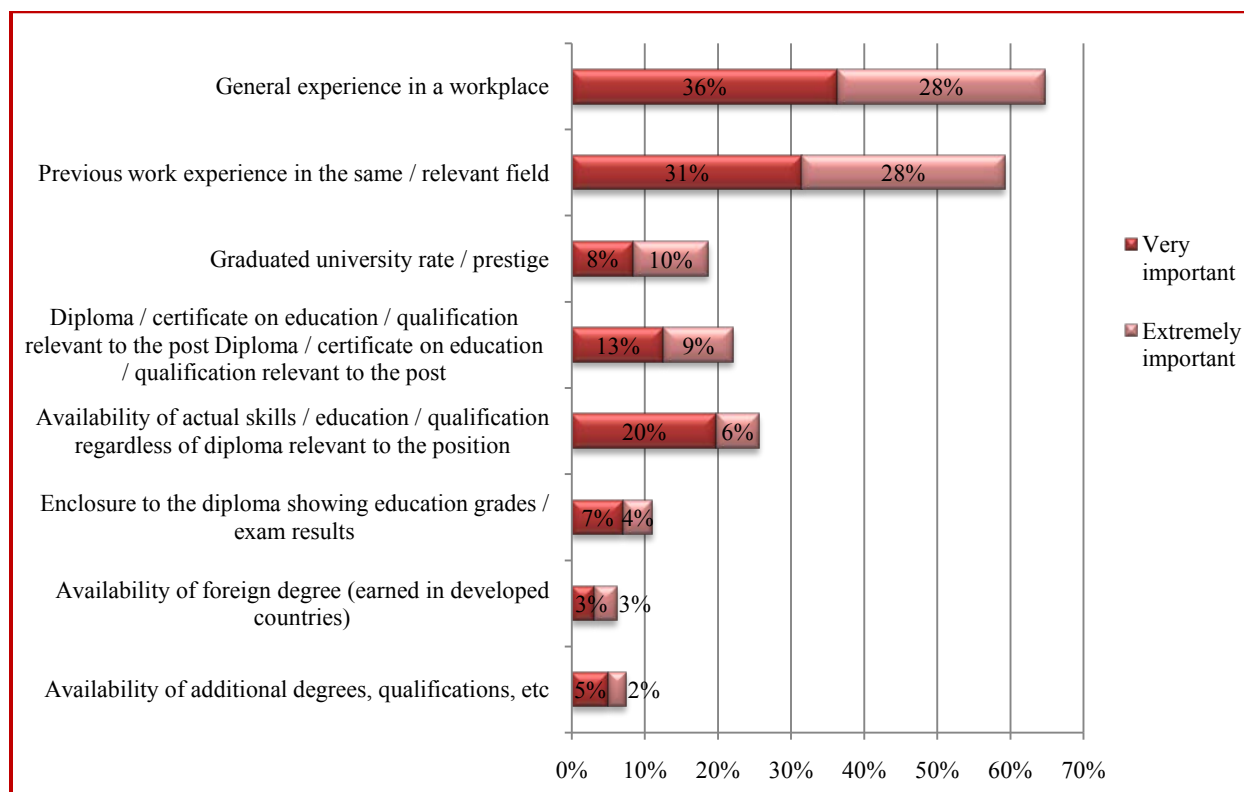
Second, in basic skill, communication skill is rated the highest. On the other hand, language skills in general are not highly demanded.

**Figure 12: Basic Skills**



Finally, as per the result, in academic qualification and work experience, the most rated one is the general work experience in a workplace (64% is rated either very important or extremely important). Similarly, work experience with in the same relevant field is 59%. Academic qualifications seem to be considered as secondary.

**Figure 13: Academic Qualification and Work Experience**



The results of these analysis shows that BBSYDP, STEVTA and its training providers/institutions must make all their efforts to provide internships and other real workplace experience to their trainees. Further, the results strongly suggest that the training programs should be built according to these general skills/characteristics demanded as summarized below:

- i. Basic skills such as literacy and calculation skills
- ii. Communication skills
- iii. Computer skills
- iv. Customer relation skills
- v. Management skills

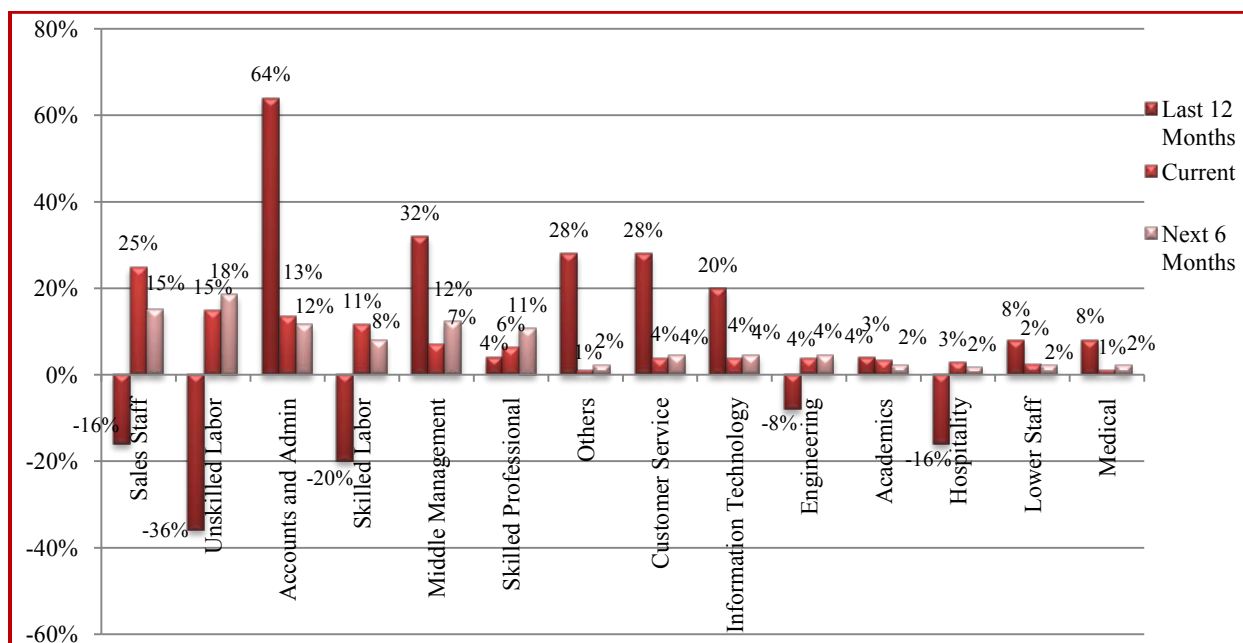
Therefore, providing both theoretical and practical training and emphasizing on OJT in real work place should be mandatory. This will also help strengthen the coordination with the employers/industry.



### 4.3.Occupations in Demand

In order to specify what types of occupations are in demand, the survey analyzed the changes in the types of occupations in the last 12 years (from November 2008 to November 2009), current situation (November 2009), and the next 6 months (from November 2009 to May 2010). Figure 14 shows that Accounts and Admin, Middle Management and Skilled Professional have been always in demand. Especially, the demand for skilled professional has been increasing constantly. While the demand for Sales Staff and Unskilled Labor, Skilled Labor, Hospitality, and Engineering decreased in the last 12 months, the demand for these occupations is resurging. Currently, the most demanded occupation is Sales Staff followed by Unskilled Labor and Accounts and Admin.

**Figure 14: Changes in Occupations Demanded**



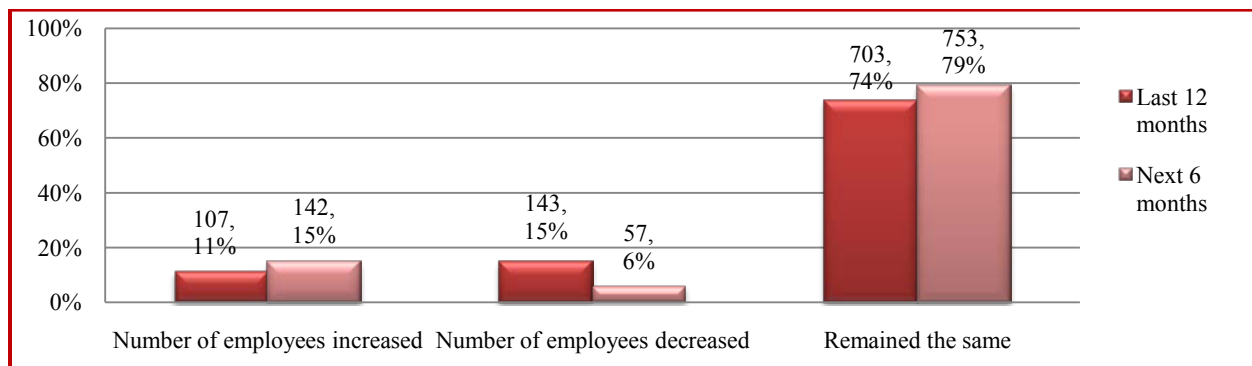
While the sufficiently detailed survey results are not available to examine which sector and region has increased and will increase hiring, combining Figure 12-14 can make a general conclusion. Highly demanded occupations including Accounts and Admin, Middle Management and Skilled Professional are all transferable skills needed in any industry, especially in business. Thus, these occupations are probably demanded in manufacturing, wholesale and retail and other service sectors. Proportionally, Sales Staff are currently the most demanded and will be the second most demanded occupation in the next 6 months. These demands are most likely coming from the Wholesale and Retail and Other Service industry. From the regional perspective, Karachi may be the main region to hire these sales staff since the region has the highest share of economic activities in Wholesale and Retail industry as well as the prospects for increasing the number of employees in the next 6 months is the highest in Karachi. Training should be developed by following these specific demands from specific industry and region.

#### 4.4. Shifts in Employment Demand

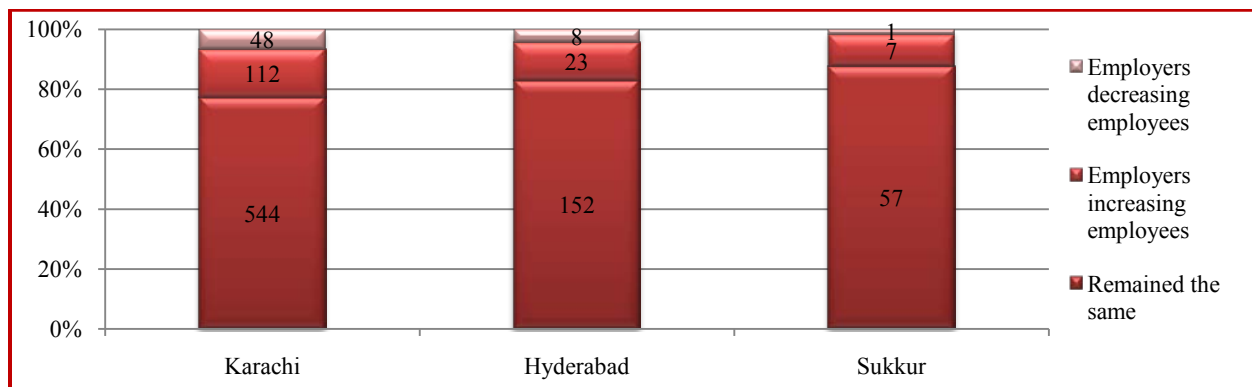
The survey was conducted to analyze the changes in the number of employees in the last 12 years (from November 2008 to November 2009), current situation (November 2009), and the next 6 months (from November 2009 to May 2010). The result shows that 74% of the enterprises did not have any change in number of employees; 15% of the enterprises decreased and 11% of enterprises increased the number of employees in the last 12 months. 89% says either no change or decrease in employment. While no drastic decrease in the number of employees occurred, the number of employees did not increase as much. A part of the reasons for this result is likely to stem from a lack of law and order, energy crisis, and high tariffs on utility.

On the other hand, the future prospects of changes in the number of employees are: 79% of enterprises have planned not to change the number of employees in the next 6 months; 15% are looking to increase and 6% might decrease the number of employees. The result indicates slow pace of business, industry and economic growth. Compared to the changes in the number of employees in the last 12 months, the proportion of the number of employees who will remain the same will increase by 5%, and also the number of employees to increase changes from 11% to 15%. Moreover, the number of employees to decrease will be reduced from 15% to 6%. Thus, overall, the future prospect is better than the last 12 months. From the regional perspective, Karachi is the most dynamic region as the number of employers which will either increase or decrease the employees is the highest.

**Figure 15: Changes in the Number of Employees**



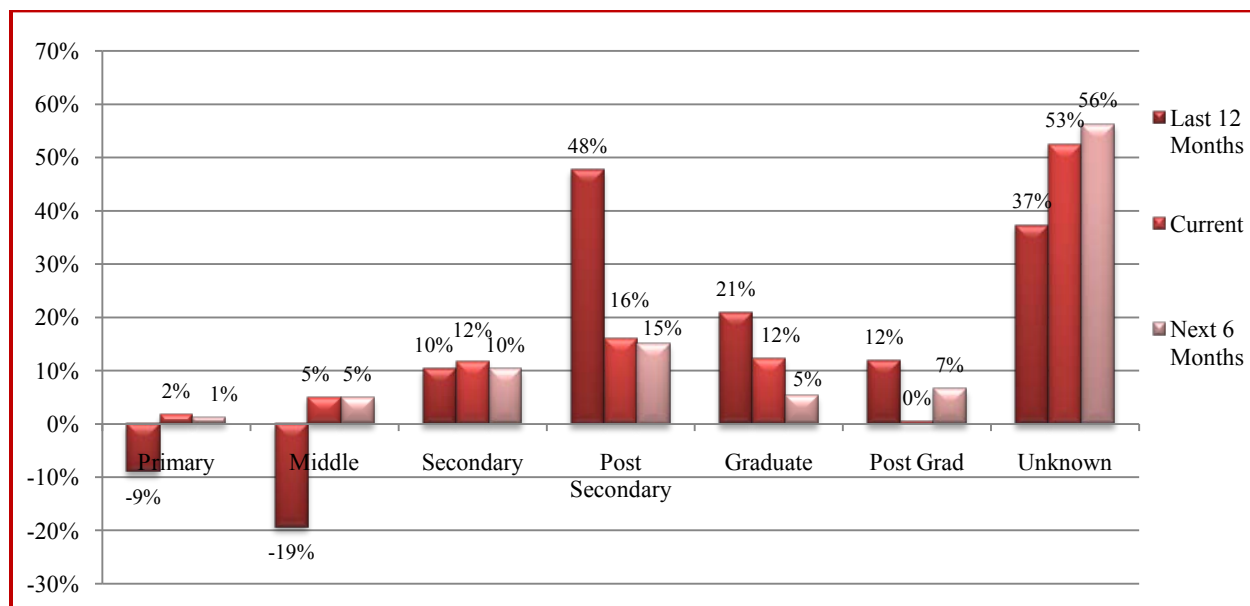
**Figure 16: Changes in the Number of Employees in Next 6 Months**



## 4.5.Shifts in Employees' Qualifications

Regarding the qualifications that the employers look for, in the last 12 months, employers have looked for mostly secondary, post secondary, graduates and post graduates (37% in total) according to the survey results below. Prerequisite qualifications of current vacancies show that employers are looking for new employees mostly with Secondary, Post Secondary and Graduates (40%) to fill current vacancies. For the future job to be created, findings show that employers are looking for new employees mostly with Secondary, Post-Secondary, Graduates and Post Graduates (40%) to create vacancies in next 6 months. Survey results show that about half of the time, academic prerequisite qualifications for the future employees are unknown. This indicates that in addition to the academic qualifications, employers look for certain characteristics, including personal characteristics, work-related skills and soft skills to find the most appropriate employees.

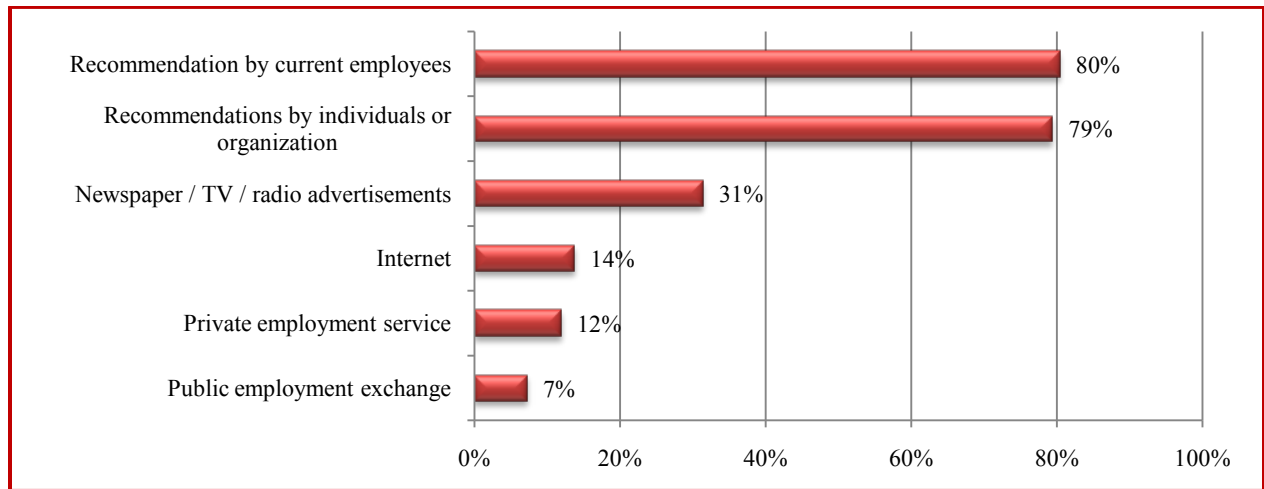
**Figure 17: Changes in Prerequisite Qualifications of Job Occupations Created and Decreased**



## 4.6.Hiring Method

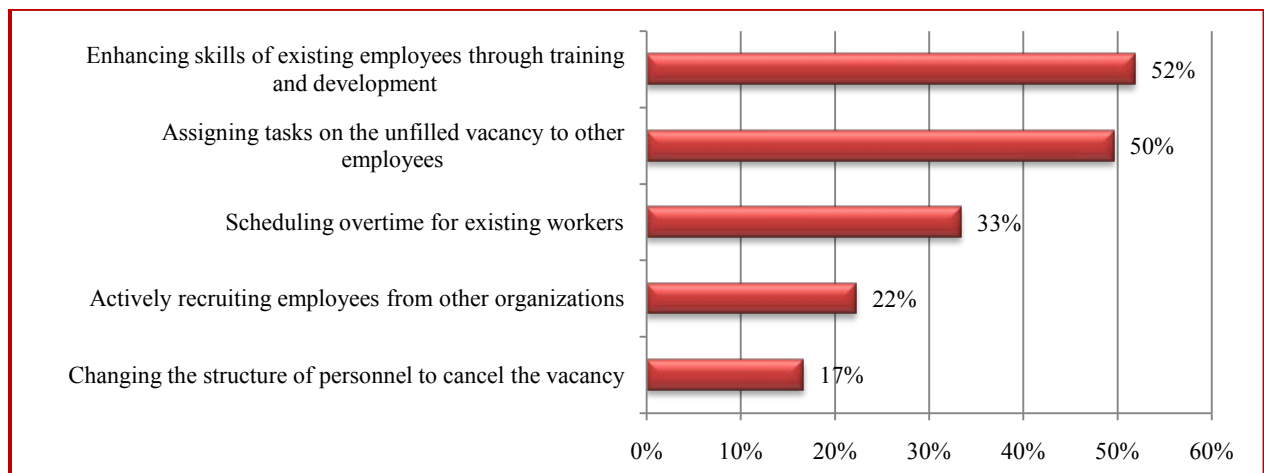
In order to establish how graduates from the TVET system best can obtain a job, the survey analyzed the hiring process of the enterprises. Major modes of filling up of vacancies are recommendations from current employees (80%) and recommendations by individuals or organizations (79%). Then, there is a large drop in share of employers to the third important mode of filling up vacancies - via Newspaper, TV, radio advertisements and internet. Few use the public or the private employment service. Mostly, vacancies are filled by employees through their recommendations. This method is probably the most cost-effective approach for the employers. Thus, developing personal connections with employees and their employers is the key element for the graduates to increase the chances of employment. This also testifies to the importance of internships to establish connection with current employees.

**Figure 18: General Mode of Filling up Vacancies**



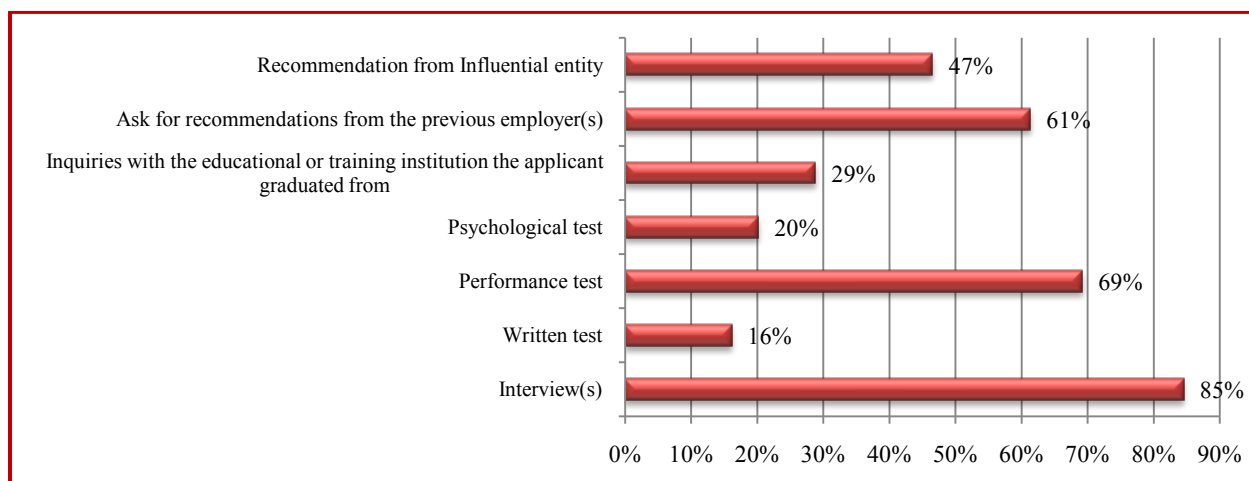
In addition to the general employment process, most of the enterprises consider "Enhancing skills of existing employees through training and development" as an important alternative mode of filling up vacancies as the survey results show. Once employees are hired, there are opportunities to enhance skills and be promoted internally.

**Figure 19: Alternative Mode of Filling up Vacancies**



When conducting a skills assessment to fill a vacancy, interviews are the most popular methods (85%), followed by performance tests (69%) and recommendations from previous employers (61%). Thus, providing job interview training is one of the key recommendations. The second most popular skill assessment is a performance test, which requires "real hands-on skills". Hence, the education and training system should shift towards providing competence certification that tests the real-hands on skills that the graduates have.

**Figure 20: Mode of Skills Assessment**

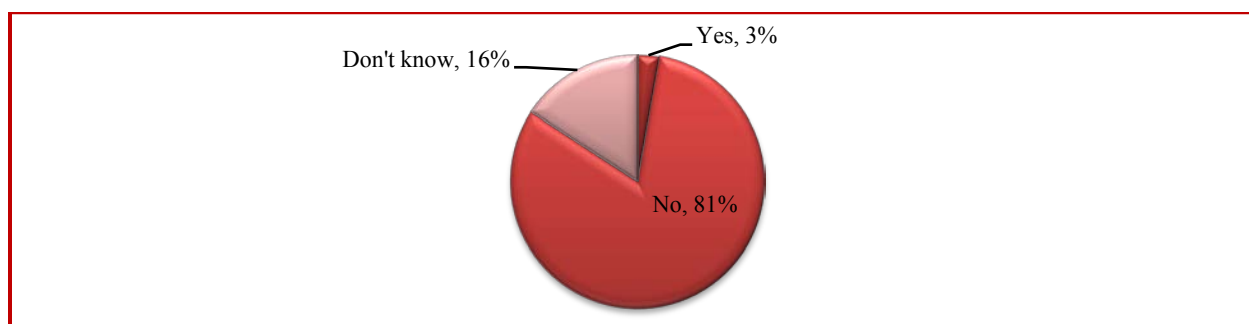


#### 4.7. Awareness of BBSYDP graduates

Considering the possibility of developing a project with BBSYDP, the employer's survey included the views on BBSYDP graduates. The survey consists of: (i) experience on hiring BBSYDP graduates, (ii) reasons for not hiring, and (iii) employers' rating of hired graduates. This helps to assess the relationship between BBSYDP graduates and employers.

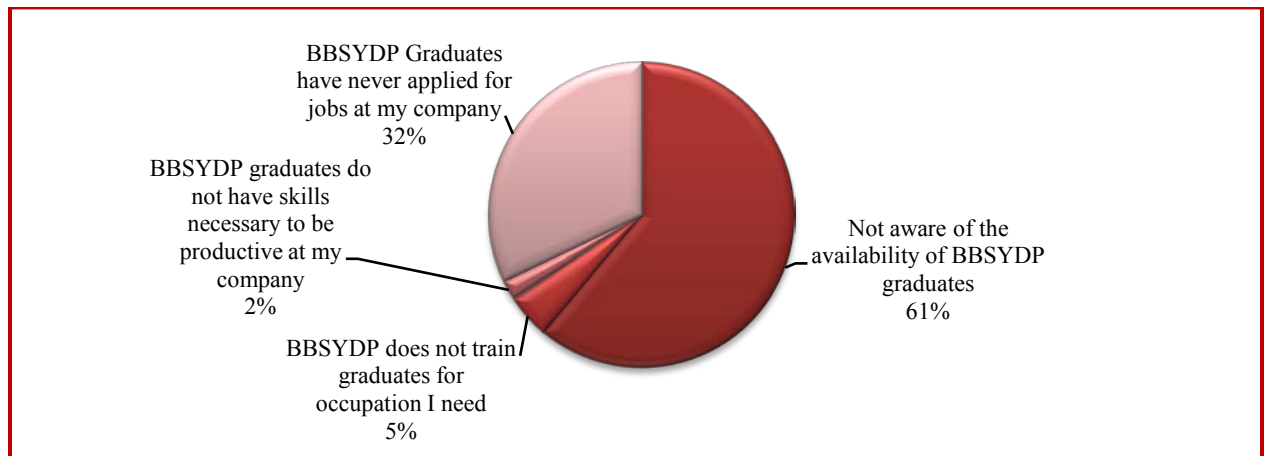
First, regarding the hiring practice of BBSYDP graduates, about 81% of the enterprises surveyed have not hired any BBSYDP graduates; hence the vast majority of the BBSYDP graduates. The reason might be more than one: (i) BBSYDP was focused on rural areas where there is more poverty than urban areas, (ii) in urban area there could be a lack of coordination between BBSYDP programmers and employers, and (iii) training for the public sector. This needs to be improved.

**Figure 21: Past Experience in Recruiting BBSYDP Graduates**



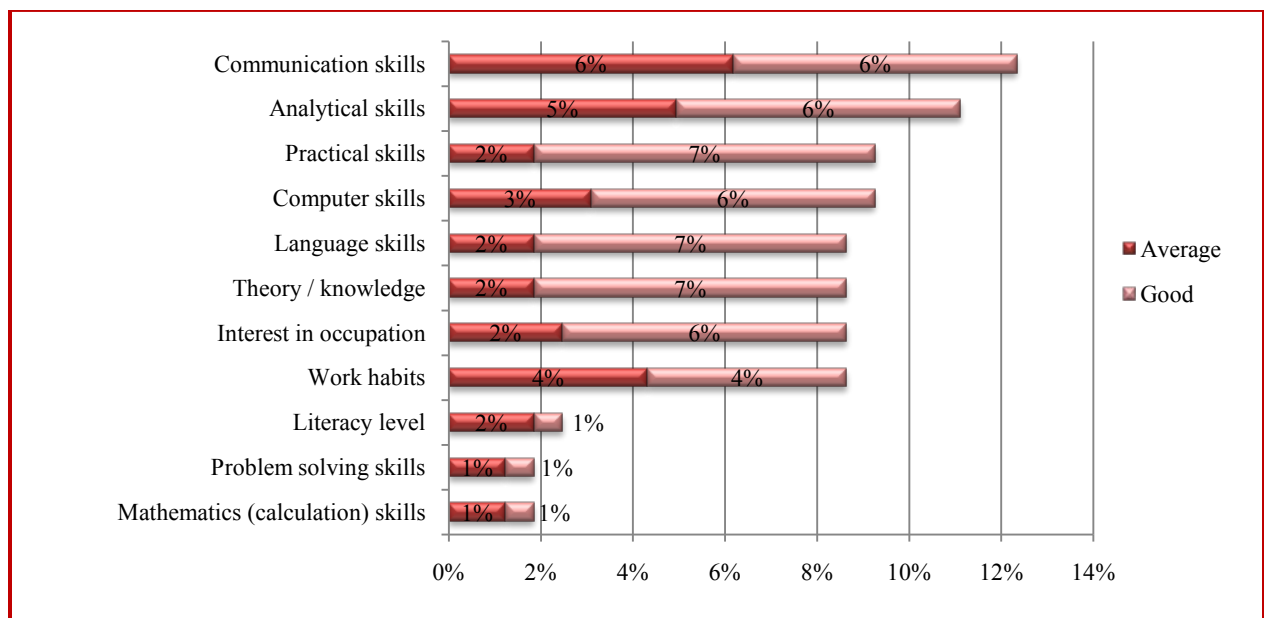
Second, the reasons for not hiring BBSYDP graduates were assessed. About 61% of the enterprises were not aware of the availability of BBSYDP graduates and 32% stated that BBSYDP graduates have never applied for jobs at their company. The result indicates a shortcoming of BBSYDP outreach and publicity. It is recommended that employers should be taken on board in designing BBSYDP training program.

**Figure 22: Reasons for not Hiring BBSYDP Graduates**



Finally, regarding the quality of BBSYDP graduates, communication skills, analytical skills and computer skills are the most highly rated basic skills followed by practical skills, language skills, theory/ knowledge and interest in occupation. While only a very small number of companies (less than 20 in general) have responded to this question, overall results show that graduates performed well.

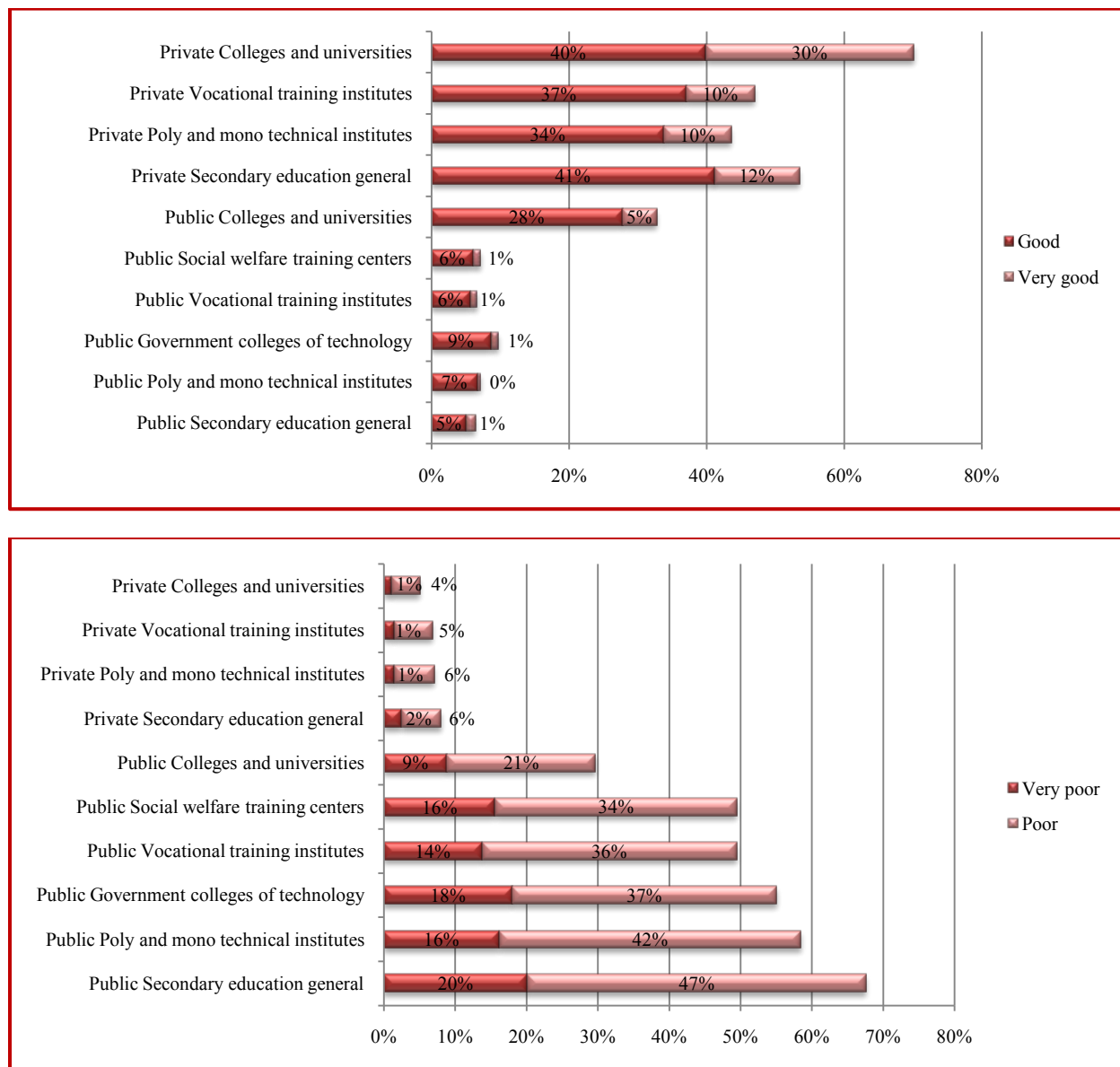
**Figure 23: Rating of BBSYDP Graduates Quality**



## 4.8. Rating of Technical and Vocational Training System

The survey revealed that public education and training system have tremendous task ahead of them in improving the quality of their graduates on at least the perception of the quality. 68% of the employers rate Public Secondary education in general as either very poor or poor. Similarly, 58% of Public Poly and mono technical institutes, 49% of Public Social welfare training centers and Public Vocational training institutes are also rated as either very poor or poor. This needs to change. It is very important that politicians, government, principals and teachers are aware of the public perception of the quality of the graduates. This is not a sustainable situation. It calls for immediate actions to reform the system. On the other hand, privately-run colleges and universities, secondary education, vocational training institutes and Poly and mono technical institutions received favorable results.

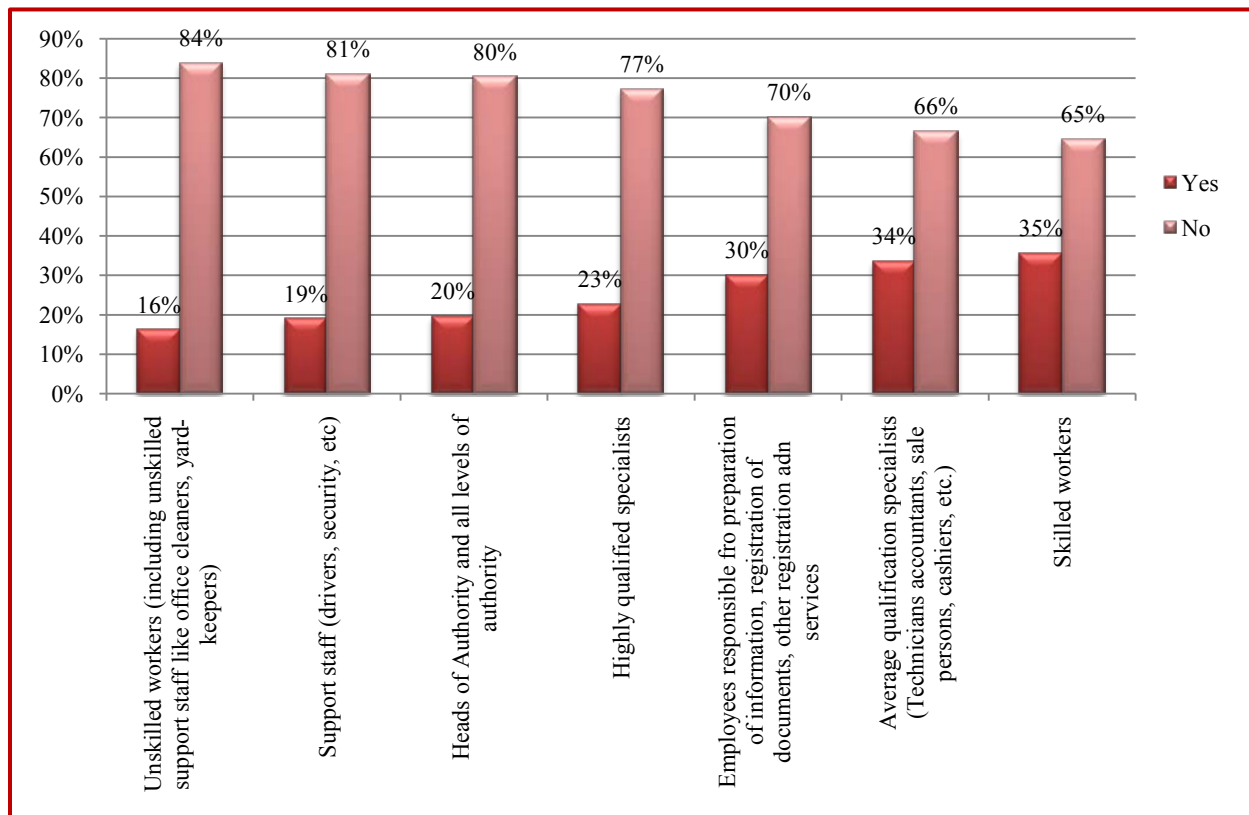
**Figure 24: Views about the Technical and Vocational Training System**



## 4.9. Internal Training

In terms of the provision of trainings for employees, most companies do not provide a lot of training. Average proportion of enterprises offers training for their employees, particularly for skilled workers and technicians. Given this trend, it should be possible for BBSYDP to work with employers to arrange short term OJT for their students.

**Figure 25: Training for Employees**



## 5. Summary and Recommendations

This section summarizes the findings from the survey and provides recommendations for the future project development.

### ***(i) Rising Demand for Skills: Need for Skills program***

A whopping 73% of companies report that skill requirements have increased over the last two years. In their view, this is due to increased customer demand, more competition, new technology, and higher quality standards. Companies especially face difficulty finding highly qualified specialists (31% of companies), heads (27%), and skilled workers (26%). Consequently, there is a need to develop the skills



of the Sindhi workforce, and in particular youth so that they can qualify for the new positions that require skills.

***(ii) Need for Training of specific Skills since punctuality, commitment, prior job-experience, and communication skills are most in demand***

Employers have strong preference for certain personal characteristics, notably punctuality (86% rate this characteristic extremely or very important), commitment (85%), honesty (84%), and reliability (83%). While these personal characteristics cannot be nurtured in one day, a training program that demands, promotes and lives such personal characteristics is likely foster such characteristics and therefore lead to higher success rates. For instance, the training program must ask and monitor that trainees show up on time.

Two-thirds of employers (64%) rate prior job-experience as either very important or extremely important. General work experience is therefore a most critical qualification for a job. Internships and opportunities for trainees to acquire real work experience will substantially raise the qualification of a trainee. Further such on-job-training is likely to promote the personal characteristics, such as punctuality and commitment, which are equally in high demand. BBSYDP and STEVTA could strongly encourage training providers to include internship and other opportunities to gain real-life job experience.

In basic skills, the most demanded skills are communications skills, ability to work independently, and management skills (69% of employers rated each of these skills extremely or very important). Basic skills such as calculation, literacy and problem-solving skills are equally valued. Technical skills are hence not sufficient; employers are also looking for soft skills such as communications. One way forward is to offer Soft skills modules to all trainees as an addition to technical skills. BBSYDP and STEVTA can also consider linking with youth and adult literacy and second-chance education programs to promote trainees acquiring basic literacy and calculation skills.

***(iii) Occupations in Demand: Need for Specific Trainings for Occupations Demanded***

Accounts and Administrative occupations are consistently the most demanded occupations, while Sales Staff is also in high demand. The most demanded occupations in the 12 months preceding the survey (from November 2008 to November 2009) were: Accounts and Admin (64%), Middle Management (32%), and Customer Service (28%). At the time of the survey (November 2009), Sales Staff are most demanded (25%) followed by Unskilled Labor (15%) and Accounts and Admin (13%). For 6 months following the survey (from November 2009 to May 2010), the most demanded occupations were expected to be: Unskilled Labor (18%), Sales Staff (15%), and Accounts and Admin (12%).

While this finding gives a glance into which occupations are in demand, a more nuanced Training Needs Assessment at the district-level is required. The BBSYDP is already carrying out a large Training Need Assessment to aggressively coordinate with employers and elaborate a such detailed picture of the type of skills and occupations in demand. This will not only unearth new occupations and skills in demand from growing economic sectors where youth can be employed, but it will also serve to link BBSYDP and its training partners with stronger employers connections.

***(iv) Improved Employment Prospects***

Employment prospects were gradually improving from 2009 to 2010. Only 6% of the firms responded that the number of employees would decrease from November 2009 to May 2010, and the overall outlook for employment was slightly positive compared to the preceding 12 months. 15% of the firms expected an increase in the number of employees while the large majority (79%) expected the number of employees to remain constant from 2009 to 2010.

***(v) The Importance of Recommendations when hiring: Need to provide trainees with direct contacts to firms and prepare trainees for interviews***

80% of the employers hire new employees through recommendations from current employees. Also, 79% of employers hire new employees through recommendations by individuals and organizations. Only 31% use newspapers and even fewer recruit through the public or the private employment services and internet databases. The best chances for BBSYDP and STEVTA graduates to be hired are therefore to contact employers and employees and earn their recommendation for a future job. The training providers should provide their trainees with internships, industry contacts and exposure. This is the way to get trainees hired.

Employers primarily rely on interviews (85%) and on performance tests (69%) when interviewing and hiring candidates. Preparing a trainee for this often difficult situation will lead to higher success. Thus, training programs could prepare trainees through mock interview sessions and other interview practice sessions, including practicing typical tests required by employers. This would help students prepare for a job interview and performance test.

***(vii) Awareness of BBSYDP graduates: Need for an Increase in Visibility of BBSYDP***

Surprisingly 81% of the employers have no experience in recruiting BBSYDP graduates. The main reason is unawareness of the availability of BBSYDP graduates (61%). Thus, BBSYDP could require their training providers to promote the availability and insertion of their trainees. Training providers need to make BBSYDP graduates visible to the employers through networking, outreaching such as arranging job-seminars, and tailor training to demand together with companies.

In order to strengthen the connection between BBSYDP graduates and employers, the following actions are suggested:

- i. Improve the employment of BBSYDP graduates by stressing and incentivizing training providers to introduce new programs that are in high demand from public and private employers;
- ii. In accordance to Training Need Assessment (TNA), BBSYDP should aggressively coordinate with employers to include On-the-Job Training (OJT) and/or provide internships as part of their training program;
- iii. BBSYDP needs to reach out further to employers and possibly consider further marketing to ensure that employers know about the activities of BBSYDP and the skills of their graduates;

***(viii) Rating of Technical and Vocational Training System: Need for a Reform in Public Institutions***

More than half of the employers, 58%, rate public poly and mono techniques as either very poor or poor, 55% for public colleges of technology, 50% for public Vocational Training Institutes and social welfare training centers. This striking finding demonstrates that the public education and training system has a

tremendous task ahead of them to substantially improve quality and relevance of training. The recommendations are:

- i. Improve the structure and content of vocational and technical training programs to meet the demand of skilled labor for direct production sectors in order to make the efficient labor structure;
- ii. Involve and empower local employers and industry professionals in the management of public (and private) training institutions through the Management Committee of the institutions and through program level private sector advisory groups.
- iii. Modernize vocational and technical training education system to achieve the regional and international training standard. Resources to update facilities and equipment's are limited; therefore, establishing high demand programs and rationalize provision is necessary;
- iv. Government should play a leading role to provide resources for vocational and technical training development, but private resources need to be leveraged as well to ensure sustainable financing. Institutions must be given an incentive to raise revenue;
- v. Customize content and delivery of training to young girls to enable them to participate and benefit from TVET programs, and
- vi. Strengthen the quality of skilled workers through strengthening the vocational quality assurance conditions in accordance with latest training levels;

***(ix) Internal Training: Current Focus is on Educated and Skilled Employees***

Most enterprises do not provide training to unskilled employees. Internal enterprise-financed training focuses mainly on those workers who already have education background and skills. For example 34% of enterprises train for accountants, sales persons etc.), and 30% of enterprises offer trainings for their clerical staff. Training of unskilled labor is therefore NOT carried out by firms unless directly incentivized by the government or a third party. Thus, in order to provide more opportunities for those who do not have the required education background or skills, publicly-funded, demand-driven training should be provided.

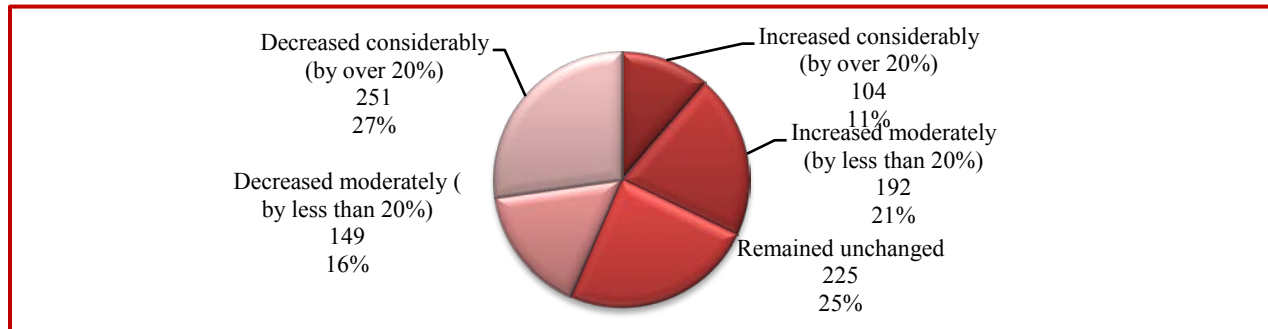


## Annex

### 1. Growth Perspective of the Enterprises

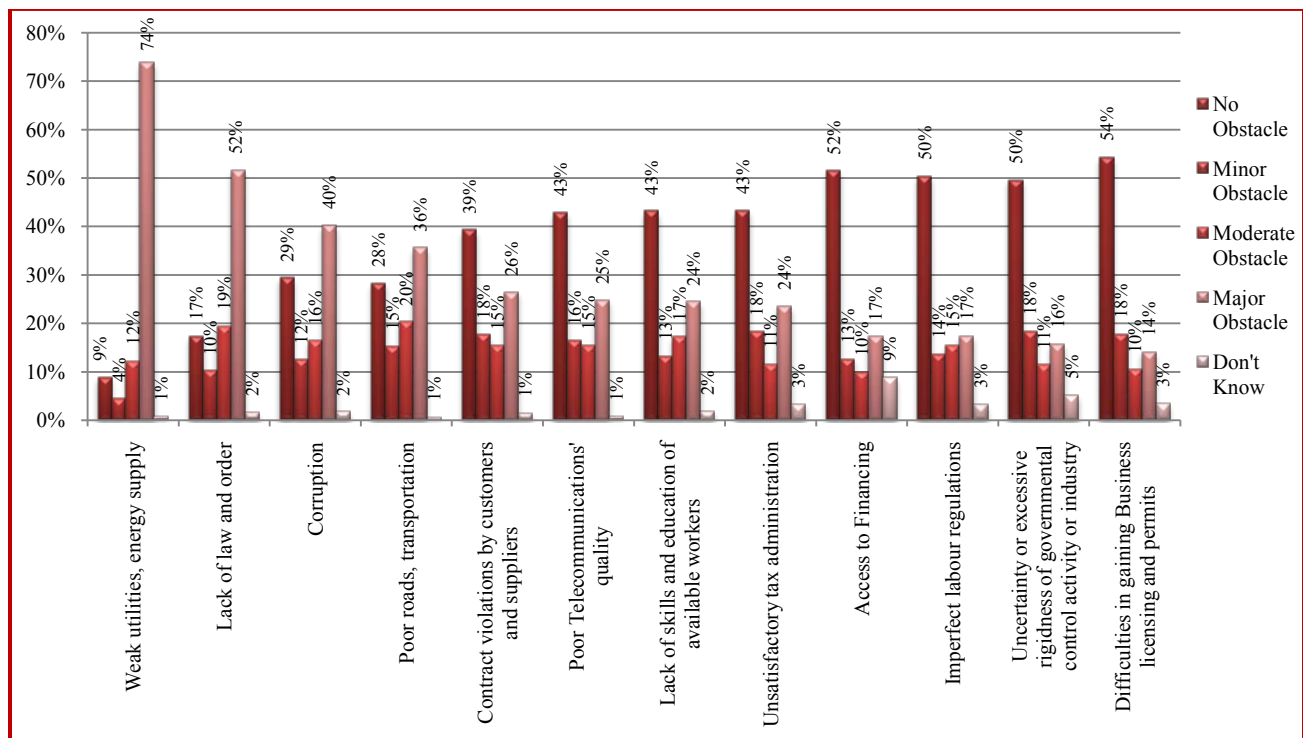
Due to economic recession, lack of law and order, energy crises, and electricity and gas load shedding, productivity and business activities were hampered. As a result, 67% replied either no change or decrease in their revenue. These enterprises would not be able to generate employment as assured from the results.

**Figure 26: Sales Revenue over last fiscal year**



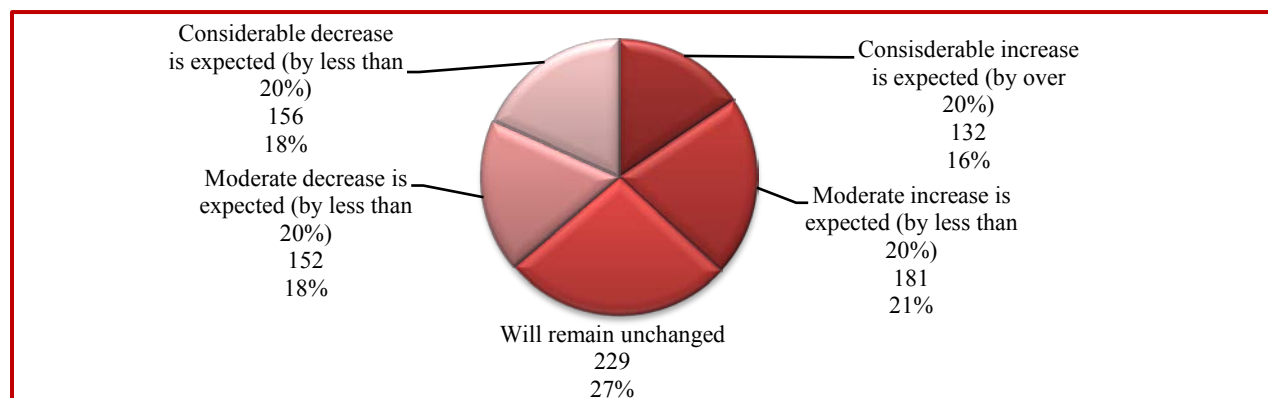
In order to foster growth of the companies, the survey also asked the major obstacles to operation and growth of the enterprises as listed below. The result shows that weak utilities and energy supply are the top major obstacle (74%) for the operation and growth of the companies. Then the lack of law and order (52%), corruption (40%), poor roads and transportation (36%) follow. These problems should be addressed by government and must be resolved so that private sector can generate employment.

**Figure 27: Problematic Areas**



While the obstacles for the growth continue to exist, the future prospect of sales revenue is relatively positive compared to the sales revenue of the previous year. For instance, only 32% of the enterprises showed the increase in sales over the last fiscal year, but 37% of the enterprises are expecting some growth in the future. However, there is wide range desperation about future outlook of business as the result discloses about 63% are either expecting no increase in or decrease in revenue. Government could improve this perception through resolving some of the obstacles that enterprises are facing, such as energy crisis, law and order situation, and unfriendly business and investment environment.

**Figure 28: Future Prospects of Sales Revenue**



## 2. Survey Questionnaire

**S1. What is your job title? Please note that even if you have more than one job title we are interested in knowing your main responsibility.**

	Variable S1
Chairman of the Board	1
Chief Executive Officer	2
Head of personnel department	3
Manager/inspector of personnel department	4
Business owner, partner	5
Other (Please specify)_____	6

### **A. Firm (Enterprise) Characteristics**

A1. Full enterprise name \_\_\_\_\_ (Variable A1)

A2. In what year did this firm begin operating in Sindh? \_\_\_\_\_ (Variable A2)

A3. What is the ownership status of this firm (Variable A3)?

	Variable A3
Public Limited Company	1
Private Limited Company	2
Sole Proprietor	3
Partnership	4
Society (Association of Persons)	5
Government enterprise	6
Other (Specify)_____	99

A4. Was your firm (enterprise) established with participation of foreign equity (international investor)?

	Variable A4
Yes	1
No	2
Don't know	99

A5. Please specify the major economic activity of your enterprise

	Variable A5
Agriculture, forestry and fishing	1
Mining and quarrying	2
Manufacturing	3
Electricity, gas, steam and air conditioning supply	4
Water supply; sewerage, waste management and remediation activities	5

	Variable A5
Construction	6
Wholesale and retail trade; repair of motor vehicles and motorcycles	7
Transportation and storage	8
Accommodation and food service activities	9
Information and communication	10
Financial and insurance activities	11
Real estate activities	12
Professional, scientific and technical activities	13
Administrative and support service activities	14
Public administration and defence; compulsory social security	15
Education	16
Human health and social work activities	17
Arts, entertainment and recreation	18
Other service activities	19
Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use	20
Activities of extraterritorial organizations and bodies	21
Agriculture, forestry and fishing	22
Mining and quarrying	23
Other	99

A6. Can you please tell how problematic are the following different factors for the operation and growth of your business (answer all the questions)

	No obstacle	Minor obstacle	Moderate obstacle	Major Obstacle	Don't know	Variable A6
Access to financing (e.g., collateral required or financing not available from banks)	1	2	3	4	99	A6a
Poor telecommunications' quality	1	2	3	4	99	A6b
Poor roads, transportation	1	2	3	4	99	A6c
Unsatisfactory tax administration	1	2	3	4	99	A6d
Difficulties in gaining business licensing and permits	1	2	3	4	99	A6e
Imperfect labor regulations	1	2	3	4	99	A6f
Lack of skills and education of available workers	1	2	3	4	99	A6g
Uncertainty or excessive rigidity of governmental control over your activity or industry	1	2	3	4	99	A6h
Corruption	1	2	3	4	99	A6i
Contract violations by customers and suppliers	1	2	3	4	99	A6j



	No obstacle	Minor obstacle	Moderate obstacle	Major Obstacle	Don't know	Variable A6
Lack of Law and Order	1	2	3	4	99	A6k
Weak Utilities, energy supply	1	2	3	4	99	A6l

A7. What is the approximate size of your company (i.e. current number of employees in your firm)?

		Variable A7
Large (over 250 employees)	1	A7a
Small/Medium (between 10 to 250 employees)	2	A7b
Micro (under 10 employees)	3	A7c
Permanent employees full-time in percentage	%	A7d
Temporary/part-time/seasonal employees in percentage	%	A7e

A8. Does your firm provide training for the following categories of employees?

	Yes	No	Don't know	Variable name
Heads of authority and all levels of authority	1	2	99	A8a
Highly qualified specialists	1	2	99	A8b
Average qualification specialists (Technicians accountants, sale persons, cashiers, etc.)	1	2	99	A8c
Employees responsible for preparation of information, registration of documents, other registration and services	1	2	99	A8d
Skilled workers	1	2	99	A8e
Support staff (drivers, security, etc.)	1	2	99	A8f
Unskilled workers (including unskilled support staff like office cleaners, yard-keepers)	1	2	99	A8g

A9. How did the sales revenue of your firm change **over the last fiscal year** (compared to previous year)?

	Variable A9
Increased considerably (by over 20%)	1
Increased moderately (by less than 20%)	2
Remained unchanged	3
Decreased moderately (by less than 20%)	4
Decreased considerably (by over 20%)	5
Don't know	99

A10. What in your view are your firm's future prospects as to sales and services revenue **for the next 6 months**?

	Variable A10
Considerable increase is expected (by over 20%)	1
Moderate increase is expected (by less than 20%)	2
Will remain unchanged	3
Moderate decrease is expected (by less than 20%)	4
Considerable decrease is expected (by over 20%)	5
Don't know	99

## **B. Labor Turnover (last 12 months)**

B1. How has the number of employees changed for the **last 12 months** in contrast with the previous year?

	Specify approximate number of people in this column	Variable Name
Number of employees increased (Go to B2):	1	B1a
Number of employees decreased (go to B3)	2	B1b
Remained the same (Go to B4)	0	B1c

B2. Please specify the job titles where you INCREASED hiring during the last 12 months, the minimum level education required, and the approximate number hired. *(Please enter the job title and the approximate figure reflecting the increase in the number of employees for this job)*

Occupational Area	Required education level: 1 Primary 2 Middle 3 Secondary 4. Post Secondary (Diploma/Intermediate) 5. Graduate 6 Post Graduate	Increased by: (please specify number of people)	Variable name
1	1 2 3 4 5 6	___ people	B2a
2	1 2 3 4 5 6	___ people	B2b
3	1 2 3 4 5 6	___ people	B2c
4.	1 2 3 4 5 6	___ people	B2d
5	1 2 3 4 5 6	___ people	B2e
6	1 2 3 4 5 6	___ people	B2f

B3. Please specify the job titles for which the number of employees **decreased over the last 12 months** and the level of decrease: *(Enter the job title, level of education, and approximate decrease in the number of employees for this job)*

Occupational Area	Level of Education	Decreased by	Variable Name
1	1 2 3 4 5 6	___ people	B3a
2	1 2 3 4 5 6	___ people	B3b
3.	1 2 3 4 5 6	___ people	B3c

Occupational Area	Level of Education	Decreased by	Variable Name
4.	1    2    3    4    5    6	____ people	B3d
5	1    2    3    4    5    6	____ people	B3e
6.	1    2    3    4    5    6	____ people	B3f

B4. What are your firm's plans for the **next 6 months** in terms of changing the total number of employees?

	Specify approximate number of people in this column	Variable Name
Number of employees to increase (Go to B5):	1	B4a
Number of employees decreased (go to B6)	2	B4b
Remained the same (Go to B7)	0	B4c

B5. Please specify job titles, minimum required education level, for which your firm is planning to **increase the number of employees over the next 6 months** and the level of increase:

*(Please enter the job title and the approximate level of planned employee increase for this job title)*

Occupational area	Required education level: 1 Primary 2 Middle 3 Secondary 4. Post Secondary (Diploma/Intermediate) 5. Graduate 6 Post Graduate	Increased by:	Variable name
1.	1    2    3    4    5    6	____ people	B5a
2.	1    2    3    4    5    6	____ people	B5b
3.	1    2    3    4    5    6	____ people	B5c
4.	1    2    3    4    5    6	____ people	B5d
5.	1    2    3    4    5    6	____ people	B5e
6	1    2    3    4    5    6	____ people	B5f
No such plans were developed	99		B5g

B6. Please specify the job titles, minimum education level, for which your firm is planning to **decrease the number of employees over the next 6 months** and the level of decrease:

*(Please enter the job title, level of education, and the level of planned employee decrease for this job title)*

Occupational area	Required education level:	Increased by:	Variable Name
1.	1    2    3    4    5    6	____ people	B6a
2	1    2    3    4    5    6	____ people	B6b

Occupational area	Required education level:	Increased by:	Variable Name
3	1 2 3 4 5 6	____ people	B6c
4.	1 2 3 4 5 6	____ people	B6d
5.	1 2 3 4 5 6	____ people	B6e
6._	1 2 3 4 5 6	____ people	B6f
No such plans were developed	99		B6g

B7. Have you recruited expatriate workers within the last 12 months?

	Variable B7
Yes (go to B8)	1
No (go to section C)	2

B8. Please provide the following information about foreign workers you have recruited over the last 12 months.

		Variable name
1. Approximate Number of foreign workers recruited:	_____	B8a
2. Country / countries from which they were recruited (list up to 3 most common countries):	Country A: _____	B8b
	Country B: _____	B8c
	Country C: _____	B8d
3. Occupations for which they were recruited (list up to 3 most common job titles or occupations):	Occupation A: _____	B8e
	Occupation B: _____	B8f
	Occupation C: _____	B8g

### **C. Vacancies**

C1. Please specify the major vacancies currently available at your firm: *(Please fill out the table below)*

*A position is considered vacant under the following three conditions: 1) the position is available (including full employment, part-time employment as well as temporary and seasonal employment); 2) one can commence work within 30 days, 3) your Company is actively seeking for employees to take the position.*

Occupational area	Required education level: 1 Primary 2 Middle 3 Secondary 4. Post Secondary (Diploma/Intermediate) 5. Graduate 6 Post Graduate	Approximate number of vacancies	Period of search, <u>weeks</u>	Variable Name
(a)	(b)	(c)	(d)	
TOTAL				C1a
1. _____	1 2 3 4 5 6			C1b
2. _____	1 2 3 4 5 6			C1c
3. _____	1 2 3 4 5 6			C1d
4. _____	1 2 3 4 5 6			C1e
5. _____	1 2 3 4 5 6			C1f
6. _____	1 2 3 4 5 6			C1g

C2. How difficult it is to find skilled labor to fill the vacancies at your firm in the following job categories. *(Provide one answer per line reflecting types of jobs for which vacancies were / are available at your firm)*

	Very difficult	It's more difficult than easy	Don't know if it is difficult or not	It's more easy than difficult	Very easy	Did not search	Variable name
Heads of authority and all levels of authority	1	2	3	4	5	6	C2a
Highly qualified specialists	1	2	3	4	5	6	C2b
Average qualification specialists (Technicians, average accountants, sale persons, cashiers).	1	2	3	4	5	6	C2c
Employees for preparation of information, registration , ICT services	1	2	3	4	5	6	C2d

	Very difficult	It's more difficult than easy	Don't know if it is difficult or not	It's more easy than difficult	Very easy	Did not search	Variable name
Skilled workers	1	2	3	4	5	6	C2e
Unskilled workers (including unskilled support staff like office cleaners, yard-keepers)	1	2	3	4	5	6	C2f

C3. How important are the following causes of this shortage of skills in your opinion? Please use the following scale and circle in each row.

	Not important	Slightly important	Important	Very important	Extremely important	Variable name
Local institutions train insufficient number of students	1	2	3	4	5	C3a
Poor quality of local training	1	2	3	4	5	C3b
Staff leaving to work in other organizations	1	2	3	4	5	C3c
Emigration of skilled workers	1	2	3	4	5	C3d

#### **D. Recruitment practices**

D1. How do you normally fill your vacancies? Please mention all methods used.

	Yes	No	Variable name
Newspaper/TV/radio advertisements	1	2	D1a
Internet	1	2	D1b
Recommendation by current employees	1	2	D1c
Recommendations by individuals or organizations	1	2	D1d
Public employment exchange	1	2	D1e
Private employment service	1	2	D1f

D2. If you cannot fill your vacancies by the normal means, what are the alternatives you use?

	Yes	No	Variable name
Enhancing skills of existing employees through training and development	1	2	D2a
Actively recruiting employees from other organizations	1	2	D2b
Recruiting overseas	1	2	D2c
Assigning tasks on the unfilled vacancy to other employees	1	2	D2d

	Yes	No	Variable name
Changing the structure of personnel to cancel the vacancy	1	2	D2f
Scheduling overtime for existing workers	1	2	D2g

D3. Please indicate the importance of the following personal characteristics, basic skills and job-related skills that you look for in new employees, in particular the new jobs that you are now recruiting for that you listed in the previous questions number B5.

*Please use the following scale and circle in each row.*

- 1 Not important
- 2 Slightly important
- 3 Important
- 4 Very important
- 5 Extremely important

D3 (A): Personal characteristics

		Variable name
Gender (preferably males)	1 2 3 4 5	D3Aa
Gender (preferably females)	1 2 3 4 5	D3Ab
Age (preferably not older than 25)	1 2 3 4 5	D3Ac
Age (not older than 35-40)	1 2 3 4 5	D3Ad
Intellectual level demonstrated	1 2 3 4 5	D3Ae
Reliability	1 2 3 4 5	D3Af
Punctuality	1 2 3 4 5	D3Ag
Commitment	1 2 3 4 5	D3Ah
Honesty	1 2 3 4 5	D3Ai
Personal appearance	1 2 3 4 5	D3Aj
Other physical attributes (e.g. fitness)	1 2 3 4 5	D3Ak
Stable family background	1 2 3 4 5	D3Al
Modesty	1 2 3 4 5	D3Am
Behavior manner	1 2 3 4 5	D3An

D3 (B): Basic skills

		Variable name
Communication skills	1 2 3 4 5	D3Ba
English language skills	1 2 3 4 5	D3Bb
Arabic language skills	1 2 3 4 5	D3Bc
Regional language skills	1 2 3 4 5	D3Bd
Literacy	1 2 3 4 5	D3Be
Mathematics (calculation) skills	1 2 3 4 5	D3Bf
Problem solving skills	1 2 3 4 5	D3Bg
Analytical thinking	1 2 3 4 5	D3Bh

		Variable name
Computer skills	1 2 3 4 5	D3Bi
Telephone conversation skills	1 2 3 4 5	D3Bj
Writing skills	1 2 3 4 5	D3Bk
Ability to work independently	1 2 3 4 5	D3Bl
Customer relations skills	1 2 3 4 5	D3Bm
Management skills	1 2 3 4 5	D3Bn

D3 (C): Qualifications and work experience

		Variable name
Diploma/certificate on education/qualification relevant to the position	1 2 3 4 5	D3Ca
Availability of actual skills/education/qualification regardless of diploma relevant to the position	1 2 3 4 5	D3Cb
Graduated university rate/prestige	1 2 3 4 5	D3Cc
Availability of foreign degree (earned in developed countries)	1 2 3 4 5	D3Cd
Availability of additional degrees, qualifications, etc	1 2 3 4 5	D3Ce
Enclosure to the diploma showing education grades/exam results	1 2 3 4 5	D3Cf
Previous work experience in the same/relevant field	1 2 3 4 5	D3Cg
General experience in a workplace	1 2 3 4 5	D3Ch

D4. How do you assess the skills of the applicant for the job position? *Please mention all methods used.*

	Yes	No	Variable name
Interview(s)	1	2	D4a
Written test	1	2	D4b
Performance test	1	2	D4c
Psychological test	1	2	D4d
Inquiries with the educational or training institution the applicant graduated from	1	2	D4e
Ask for recommendations from the previous employer(s)	1	2	D4f
Recommendation from Influential entity	1	2	D4g

D5. Have skill requirements in your firm increased over the last 2 years?

Increased	Decreased	Don't Know	Variable
1	2	99	D5

D6. What, in your opinion, is the reason(s) for skill requirement in your firm to increase (please mark every reason from the table below that applies):

	Yes	No	Variable name
--	-----	----	---------------



	Yes	No	Variable name
New technology	1	2	D6a
Change in workplace organization (e.g., more emphasis on personal skills, etc.)	1	2	D6b
Higher quality standards (for the firm's products or services)	1	2	D6c
More competitive business environment	1	2	D6d
Increased customer demand	1	2	D6e
Other (please specify) _____	1	2	D6f

### **E. Views about the technical and vocational Training System**

E1. How would you evaluate the quality of technical and vocational training in the public and private education institutions respectively? Please use the following scale and circle in each row.

	Very poor	Poor	Average	Good	Very good	Don't know	Variable name
<b>1. Quality of public system:</b>							
Secondary education general	1	2	3	4	5	99	E1a
Poly and mono technical institutes	1	2	3	4	5	99	E1b
Government Colleges of Technology	1	2	3	4	5	99	E1c
Vocational Training Institutes	1	2	3	4	5	99	E1d
Social Welfare Training Centers	1	2	3	4	5	99	E1e
Colleges and Universities	1	2	3	4	5	99	E1f
<b>2. Quality of private system:</b>							
Secondary general	1	2	3	4	5	99	E1g
Poly and Mono technical institutes	1	2	3	4	5	99	E1h
Vocational Institutes	1	2	3	4	5	99	E1i
Universities and Colleges	1	2	3	4	5	99	E1j

E2. Have you ever recruited and hired graduates from the Benazir Bhutto Shaheed Youth Development Program (BBSYDP)

		Variable Name
Yes	1 (go to E3)	E2a
No	2 (go to E4)	E2b
Don't know	99 (Go to E5)	E2c

E3. Please rate the quality of the Benazir Bhutto Shaheed Youth Development **Program (BBSYDP)** graduates that you have hired on the criteria listed below.

	Poor	Average	Good	NA	Variable name
<b>Basic Skills</b>					
Communication skills	1	2	3	99	E3a
Literacy level	1	2	3	99	E3e
Mathematics (calculation) skills	1	2	3	99	E3f
Problem solving skills	1	2	3	99	E3g
Analytical thinking	1	2	3	99	E3h
Computer skills	1	2	3	99	E3i
<b>Technical Vocational Skills</b>					
Theory/knowledge	1	2	3	99	E3j
Practical skills	1	2	3	99	E3k
Language skills	1	2	3	99	E3l
Work habits	1	2	3	99	E3n
Interest in occupation/job	1	2	3	99	E3o

E4. If you have **not hired** graduates from the Benazir Bhutto Shaheed Youth Development Program (BBSYDP) what is the reason?

Reason		Variable Name
Not aware of the availability of BBSYDP graduates	1	E4a
BBSYDP does not train graduates for occupations I need.	2	E4b
BBSYDP graduates do not have skills necessary to be productive at my company	3	E4c
BBSYDP Graduates have never applied for jobs at my company	4	E4d
Other	99	E4e

E5. Do you have any suggestions as to how the vocational and technical Training system could be improved? (Interviewer: Please write the respondent's response here)

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E6. Would you like to make any other comment? (Interviewer: Please write the respondent's comment here)

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Interviewer Thank Respondent (*read the statement below*):

Thank you very much for having taken the time to complete this questionnaire. The information on your perceptions of workers' skills is a very important input for the evaluation of labor skills required by firms in Sindh, as well as for the formulation of the policy advice.

THANK YOU FOR YOUR COOPERATION

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F. This section is to be filled in by the interviewer after the interview

F1 District and City code \_\_\_\_\_

F2 Address (Street name and number) \_\_\_\_\_

F3 Respondent's first name, family name, contact tel. \_\_\_\_\_

F4 Interviewer's first name, family name, contact tel. # \_\_\_\_\_

F5 Interviewer's name/signature \_\_\_\_\_