



2013

TALENT SHORTAGE SURVEY

RESEARCH RESULTS



ManpowerGroup™



EXECUTIVE SUMMARY

ManpowerGroup recently surveyed over 38,000 employers across 42 countries and territories for our annual Talent Shortage Survey. The 2013 survey is the eighth in the series. The research on the following pages identifies the proportion of employers who report difficulty filling positions in their organization. It reports on which jobs employers say are most difficult to fill, and identifies candidate shortcomings that are preventing employers from filling positions. Employers are also asked to gauge the degree of impact talent shortages have on their organizations and which strategies they are using to overcome the skills gap.

Approaching the midpoint of 2013, it is plain that the recovery from the global recession continues at a steady but frustratingly slow pace. Unemployment remains high in many global labor markets, and jobs growth—for the most part—seems stalled as employers continue to navigate an uncertain economic environment.

Today's competitive business environment continues to increase pressure on employers as they seek more cost structure flexibility while negotiating increasingly volatile economic cycles. Business leaders must confront the challenge of executing business strategies and remaining competitive while simultaneously dealing with value/margin compression amid ongoing economic uncertainty.

As is becoming clear in the Human Age, securing access to the increasingly finite pool of individuals with in-demand skill sets will be fundamental to business success.

Against this backdrop ManpowerGroup asked employers across the globe to participate in our eighth annual Talent Shortage Survey. The survey is intended to reveal insight into the following issues:

- If employers are experiencing talent shortages in their respective organizations
- If they are reporting shortages, which positions do they find most difficult to fill
- Why open positions in their organizations remain difficult to fill
- How talent shortages are impacting the client-facing abilities of their organizations
- What steps employers are taking to align talent management practices to secure the skills their organizations require

Worldwide, 35% of over 38,000 employers surveyed report they are experiencing difficulty filling jobs due to lack of available talent. This represents a slight rise in comparison to the 2012 survey and is the highest proportion of employers expressing concern about talent shortages since 2007.

Additionally, the proportion of employers telling us talent shortages impact their client-facing abilities to a high or medium degree has swelled to well over half (54%). Looking at the impact categories

individually, the percentage of employers who report talent shortages impact business outcomes at a high level climbed from 13% in 2012 to 19% in 2013, while those who identify a medium impact climbed from 29% in 2012 to 35% in 2013.

Why the change? Clearly, last year employers were still measuring the lay of the land, placing many hiring decisions on hold until business again settled into familiar patterns. However, business hasn't resumed a familiar pattern, and employers waiting for it to do so will likely wait in vain.

In fact, the increasing number of employers reporting a high or medium impact might be viewed as an encouraging sign. The uptick indicates more employers recognize the need for access to top talent; in an uncertain business environment the right skills are essential to leveraging opportunities once they appear. The survey results indicate fewer employers are resigned to await the return of business as usual.

This year we also asked employers to identify other impacts they associated with their organizations' inability to fill key roles. Nearly four out of ten respondents associated talent shortages with reduced competitiveness and productivity. One out of four respondents actually blamed the inability to fill positions with increased employee turnover.

The results of our research also indicate that a growing number of employers acknowledge the peril of conducting business when forward-looking talent management strategies are put on hold. As a result, nearly eight out of ten employers surveyed tell us they are taking steps to grow the talent pool and ensure access to the right skills that will help drive business results. Yet more than one out of five employers report that they are currently doing nothing to remedy the skills gaps, indicating that they may not understand how the talent shortage is putting their business at risk or they simply don't know how to effectively solve the issue.

HIGHLIGHTS FROM THE 2013 TALENT SHORTAGE SURVEY INCLUDE:

- Almost one in five employers who are facing talent shortages at present say this is having a high impact on their organization's ability to meet client needs
- Business performance is most likely to be impacted by talent shortages in terms of reduced client service capability and reduced competitiveness, according to hiring managers
- The most acute talent shortages are reported by employers in Japan, Brazil, India, Turkey and Hong Kong
- Employers in the Americas report the most difficulty filling technician posts, while the hardest-to-fill vacancies in Asia Pacific are for sales representatives. EMEA employers report greatest difficulty sourcing skilled trades talent
- A lack of candidates with technical competencies such as professional qualifications and skilled trades experience are the most common explanations for talent shortages in both EMEA and the Americas. However, Asia Pacific employers cite a simple lack of available candidates as the most pressing challenge
- The most likely response of employers to alleviate the talent shortages is to train and develop existing staff to meet their needs. Employers also report that their organizations are further increasing their focus on the talent pipeline and seeking to source talent outside established talent pools

GLOBAL

HOW MUCH DIFFICULTY DO EMPLOYERS HAVE FILLING JOBS DUE TO LACK OF AVAILABLE TALENT?

Talent shortages affect more than one in three businesses globally. The problem is most severe in Japan and Brazil

Of the 38,618 employers who participated in the 2013 survey, more than one in three reported difficulty filling positions as a result of a lack of suitable candidates; the 35% who report shortages represents the highest proportion since 2007, just prior to the global recession. (Figure 1)

According to the 2013 survey results—and for the second consecutive year—the most acute talent shortages are reported in Japan (85%) and Brazil (68%). (Figure 2) The problem is widespread in Asia Pacific, with more than half the employers surveyed in India (61%), Hong Kong (57%) and New Zealand (51%) saying that talent shortages prevent them from hiring people with needed skills.

Despite the high proportion of difficulty reported by employers in Brazil, the overall percentage in the Americas region dips by 2 percentage points to 39%.

Meanwhile, employers in many EMEA countries report skills gaps are having less impact on their ability to source suitable candidates. This isn't particularly surprising given the high unemployment rates reported throughout much of the region. Employers are least likely to report issues associated with talent shortages in Ireland (3%) and Spain (3%), and the proportion is also relatively low in South Africa (6%), the Czech Republic (6%) and in the Netherlands (9%). However, the inability to source the right recruits remains an issue for employers in some EMEA countries, most notably in Turkey (58%), Bulgaria (54%) and Romania (54%).

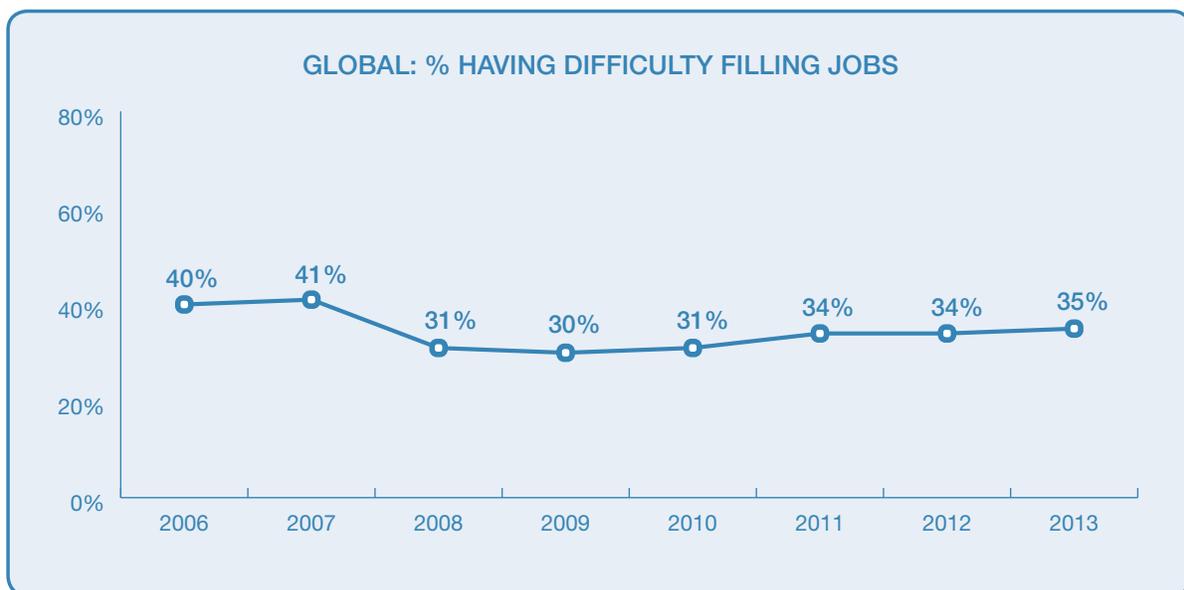


FIGURE 1

It is worth noting that the degree of difficulty employers report does not always correspond to a country's jobless rates. In Japan, for instance, unemployment rates are similar to those reported in China and Taiwan, and employers in all three countries indicate they are looking for similar skill sets. Yet the degree of difficulty reported in both China and Taiwan is significantly less than that reported in the world's fourth largest economy; the demand for specific skill sets in Japan far exceeds the current supply. Similarly, in Greece (38%) where the jobless rate hovers near 30%, the percentage of difficulty remains higher than the global average. This reflects the loss of a number of skilled individuals who took their job search elsewhere, thus leaving Greek employers with a surplus of those looking for work but a lack of individuals with the skills organizations currently need.

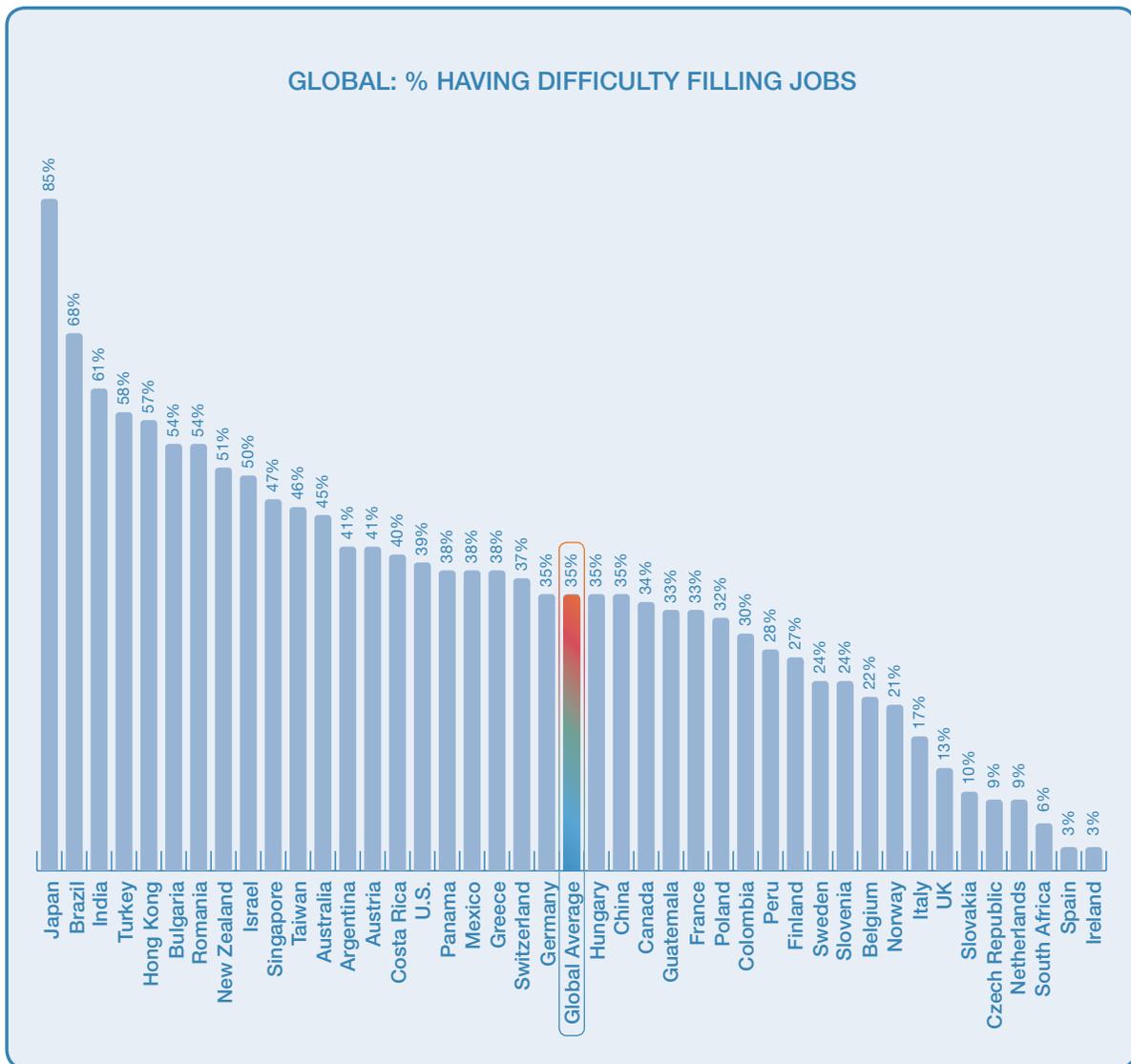


FIGURE 2

The challenge associated with talent shortages is growing in a number of countries and territories when 2013 figures are compared with 2012. (Figure 3) The most noteworthy change is reported by employers in Hong Kong (57%), where the proportion of employers with hard-to-fill vacancies is up by 22 percentage points. The proportion in Turkey is 17 percentage points higher, while increases of 14 percentage points are reported by Israeli (50%) and Greek (38%) employers.



FIGURE 3

When compared with 2012, talent shortages are a growing issue across the three largest Asian economies—China (35%), Japan (85%) and India (61%)—where the proportion of employers reporting skills gaps increase 12, 4 and 13 percentage points, respectively. The percentage of difficulty reported by employers in Japan is now the highest recorded in the eight-year history of the survey. Reported shortages are also at a six-year high in both Canada (34%), where the proportion has grown 9 percentage points year-over-year, and in France (33%) where the percentage climbs 4 percentage points.

Meanwhile, employers in the U.S. (39%) and Germany (35%) report fewer difficulties filling jobs compared to 2012; percentages in both countries dip to the lowest levels reported since 2010. The percentage shrinks 10 percentage points in the U.S. and 7 percentage points in Germany. Percentages shrink by the greatest margins year-over-year in Peru and Sweden, where employer concerns decline by 13 and 12 percentage points, respectively. (Figure 3)

WHAT IS THE ONE JOB EMPLOYERS HAVE THE MOST DIFFICULTY FILLING?

As in 2012, skilled trades vacancies are the hardest to fill at a global level, followed by engineering roles and sales representative jobs

Worldwide, the most difficult-to-fill vacancies in 2013 are for skilled trades workers. This skills category has topped the rankings in five of the past six years, the one exception being 2011, when it was placed third. The job categories in second, third and fourth places—engineers, sales representatives and technicians, respectively—are unchanged year-over-year. Accounting and finance staff move up one place in the rankings to fifth, while management and executive staff are ranked sixth, up two

places on 2012. The IT staff category slips two places to seventh in the 2013 rankings, while drivers slips to eighth this year. The secretaries/PAs/administrative assistants/office support category is ninth (tenth in 2012), while laborers slip to the tenth spot this year (from ninth in 2012). (Figure 5)

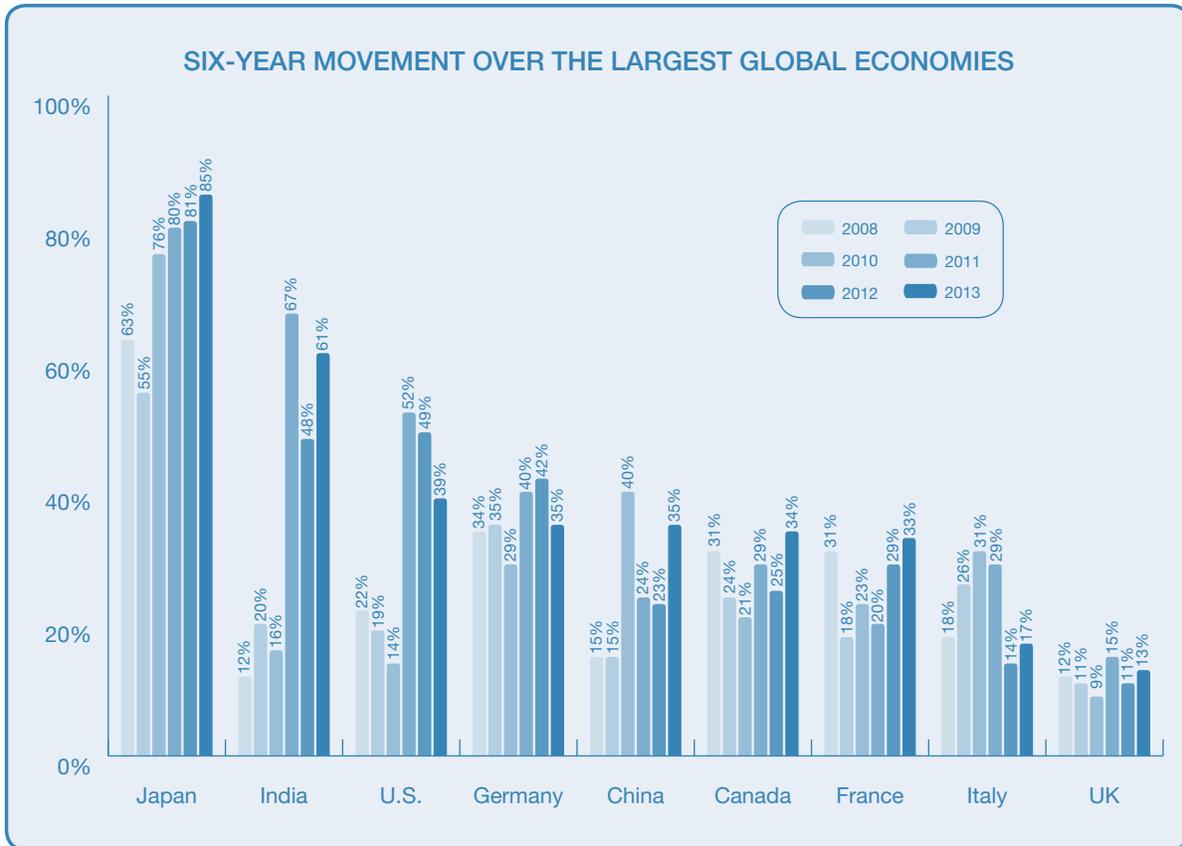


FIGURE 4

GLOBAL: TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

- 1 | Skilled Trade Workers
- 2 | Engineers
- 3 | Sales Representatives
- 4 | Technicians
- 5 | Accounting & Finance Staff
- 6 | Management/Executives
- 7 | IT Staff
- 8 | Drivers
- 9 | Secretaries, PAs, Administrative Assistants & Office Support Staff
- 10 | Laborers

FIGURE 5

WHY EMPLOYERS ARE HAVING DIFFICULTY FILLING JOBS?

At a global level hiring managers report that talent shortages are most likely to reflect a lack of technical competencies or a more general lack of applicants for a particular post, as was the case in 2012

When asked to name the chief factors contributing to the talent shortages they face, hiring managers responded similarly to the 2012 survey. The largest proportion (34%) cited a lack of specific technical competencies (or hard skills) required for a particular role, closely followed by a straightforward lack of applicants (32%) (Figure 6). Among the employers who report a lack of hard skills, shortages are most often a result of candidates lacking either the necessary professional qualifications or relevant skilled trades experience.

Approximately one in four employers (24%) at a global level report that general lack of experience is at the root of the talent shortages they face, while nearly one in five employers (19%) say candidates lack the required employability skills or “soft skills”. Employers identified a number of soft skills deficiencies, including enthusiasm/motivation (5%), interpersonal skills (4%), professionalism (e.g. appearance, punctuality) (4%), and flexibility and adaptability (4%). More than one in ten say candidates are looking for more pay than is being offered, although the proportion of hiring managers who cite this factor has declined from 13% in 2012 to 11% in 2013.

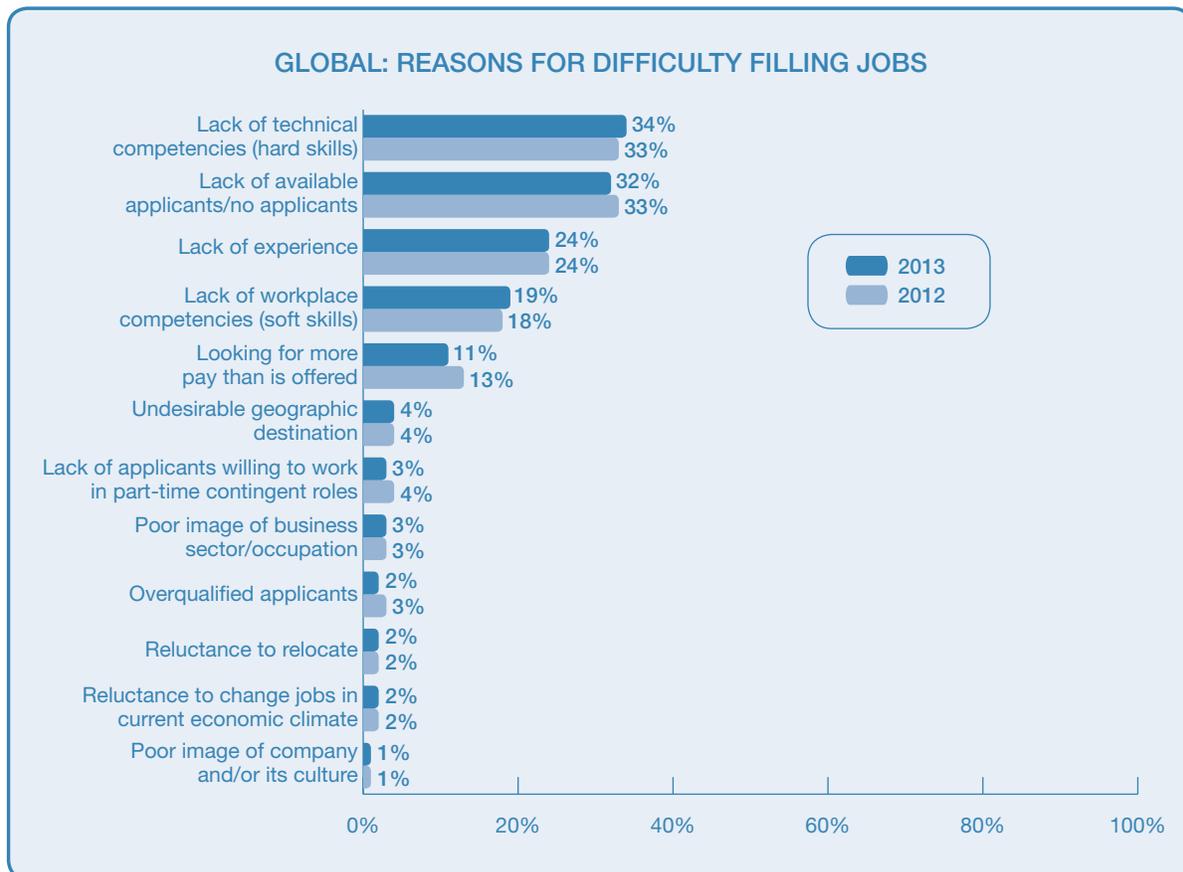


FIGURE 6

WHAT DEGREE OF IMPACT DO TALENT SHORTAGES HAVE ON THE ABILITY TO SERVE CLIENTS?

More than half of employers say skills gaps impact the ability to serve clients to a high or medium degree

One of the obvious questions associated with skills gaps is the level of impact these shortages have on the ability to satisfy client needs. This marks the third year we have asked the question. Last year we noted a surprising drop in the percentage of employers who indicated talent shortages were having a noticeable impact on their client-facing capabilities. The percentage of employers who told us talent shortages were having either a high or medium impact on their business shrank from 57% in 2011 to 42% in 2012. In 2013 that percentage climbs to 54%.

Of the more than 16,000 hiring managers who reported difficulty filling jobs, more than half told us talent shortages are impacting their ability to meet client needs to a high (19%) or medium (35%) degree. An additional 26% say talent shortages have a low impact, while less than one in five (19%) believe their client-facing capabilities and responses to stakeholder needs are currently unaffected by skills gaps (Figure 7).



FIGURE 7

HOW TALENT SHORTAGES IMPACT THE OVERALL ORGANIZATION

Employers believe talent shortages reduce competitiveness and increase employee turnover

In 2013 we asked employers to provide us with additional details on how the inability to find talent impacts their organizations as a whole. The impact on client service remains the chief concern, but the survey reveals additional ways that skills gaps negatively impact an organization. (Figure 8)



FIGURE 8

Chief among these is the reduced ability to adequately serve clients, reported by 43% of employers. In addition, 39% say that talent shortages reduce competitiveness and productivity in general. According to 25% of employers, talent shortages actually result in increased staff turnover (25%), while 22% believe talent shortages can reduce creativity and innovation. More than one in five employers say talent shortages lead to increased compensation costs (21%) and also have a detrimental effect on employee engagement/morale (21%).

WHAT STRATEGIES DO EMPLOYERS PURSUE TO OVERCOME TALENT SHORTAGES?

Developing existing staff is the most commonly used strategy to address skills gaps, followed by improving the talent pipeline and recruiting in previously untapped talent pools

The most common strategies organizations use to address talent shortages focus on people practices (45%) such as providing enhanced development opportunities for current staff, redefining job descriptions or enhancing benefits. Around a quarter have strategies which include the implementation of different work models (27%) such as offering more flexible work arrangements or redesigning current task procedures, while 24% are exploring alternative talent sources such as older workers, youth or moving work to where the talent is located. However, a sizable portion of the employers interviewed are presently doing little to address the skills gaps they've identified; more than one in five (22%) hiring managers claim they are pursuing no current strategy to deal with skills gaps (Figure 9).

Among employers who use people practices to address skills gaps, the highest percentage provides additional training and development opportunities for existing staff (23%). One in ten hiring managers say they utilize non-traditional (or previously untried) recruiting practices such as recruiting candidates not actively seeking new positions, or taking a second look at former candidates who may have been rejected in a prior recruitment cycle. A slightly smaller percentage of employers (7%) are redefining job qualifications to include people who currently lack some desired skills but have the potential to develop them as was first described in ManpowerGroup's white paper, "Teachable Fit: A New Approach to Easing the Talent Mismatch." Enhanced benefits packages are offered by 6% of

employers while 5% offer higher starting salaries. Some hiring managers say they offer candidates clearly defined career development opportunities during recruitment (4%) while others indicate they create interim roles for talented individuals with in-demand skills (3%). (Figure 10)

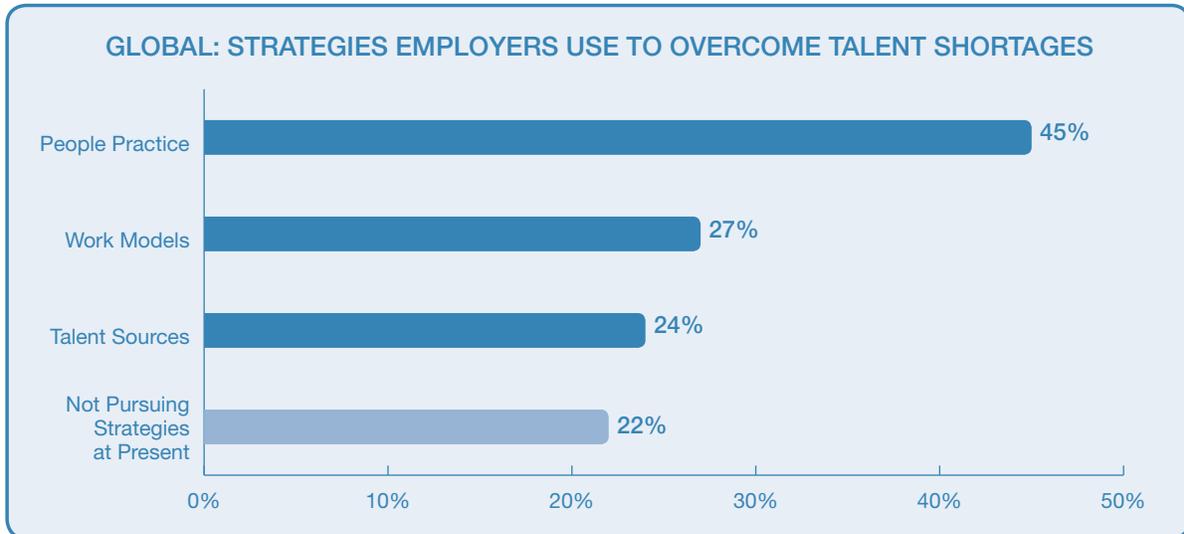


FIGURE 9



FIGURE 10

Many of the employers interviewed use work model strategies to improve their talent pipeline. For instance, 13% of employers indicate they identify high potentials and then structure a succession management plan to accommodate them. Some employers report redesigning current work practices, such as initiating shared work assignments between employees or departments (6%). Other work model-based strategies include implementing more flexible working arrangements (5%), the integration of contingent workers (5%) and providing employees with virtual working options (2%). (Figure 11)

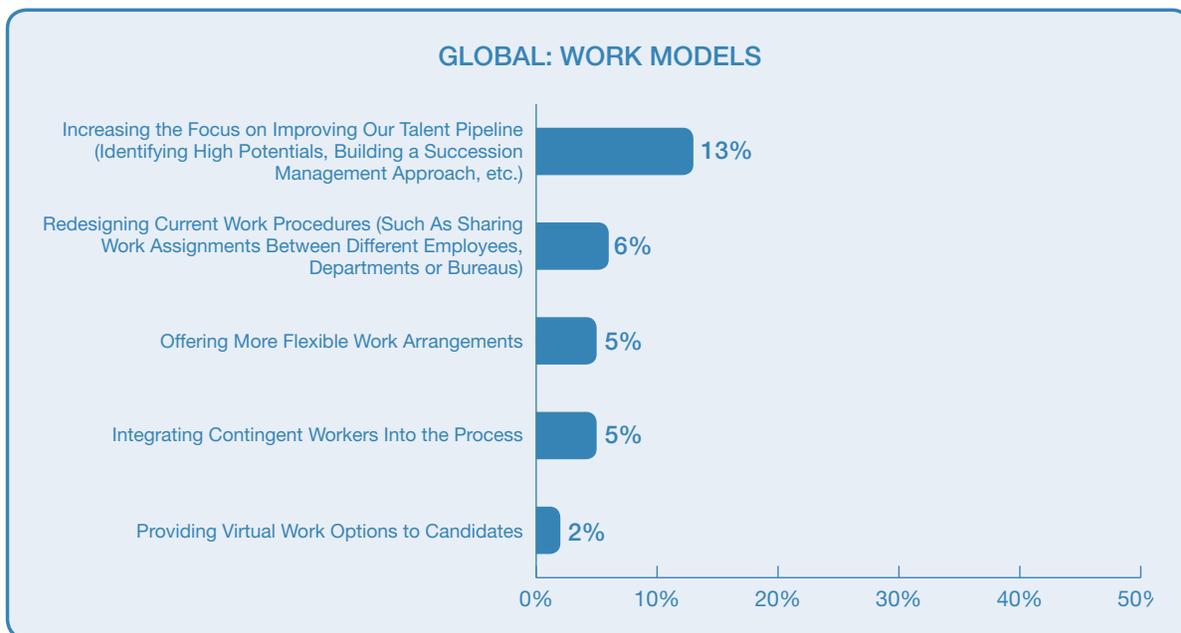


FIGURE 11

Among the employers who turn to talent sourcing remedies to close skills gaps, 13% indicate they are recruiting from talent pools not previously used. (Figure 12) Commonly pursued untapped talent pools are candidates from outside the local region (5%), candidates from outside the country (4%) and young people/youth (4%). Appointing candidates who don't currently have the requisite skills but do have potential to learn and grow is a tactic adopted by 7%, while 6% partner with local educational institutions to create curriculum aligned to the talent needs of the business.



FIGURE 12

AMERICAS

The 2013 Talent Shortage Survey includes responses from nearly 10,000 hiring managers in Argentina, Brazil, Canada, Colombia, Costa Rica, Guatemala, Mexico, Panama, Peru and the United States. The percentage of employers who report difficulty finding that the talent their organizations require dips slightly from 2012. However, the percentage of hiring managers who indicate talent shortages are having a significant impact on their abilities to serve clients and stakeholders grows significantly from 41% in 2012 to 52% in 2013.

Candidates lacking necessary hard skills and a general lack of applicants are the two key reasons why employers in the Americas are facing talent shortages.

HOW MUCH DIFFICULTY DO EMPLOYERS HAVE FILLING JOBS DUE TO LACK OF AVAILABLE TALENT?

In the Americas, 39% of employers report hiring challenges caused by talent shortages. (Figure 13) When compared with 2012, the proportion declines by 2 percentage points, but is the second highest since 2007. Lack of available talent with the necessary skills is most likely to challenge employers in Brazil (68%), while Peruvian (28%) and Colombian (30%) employers report the region's lowest levels of concern.

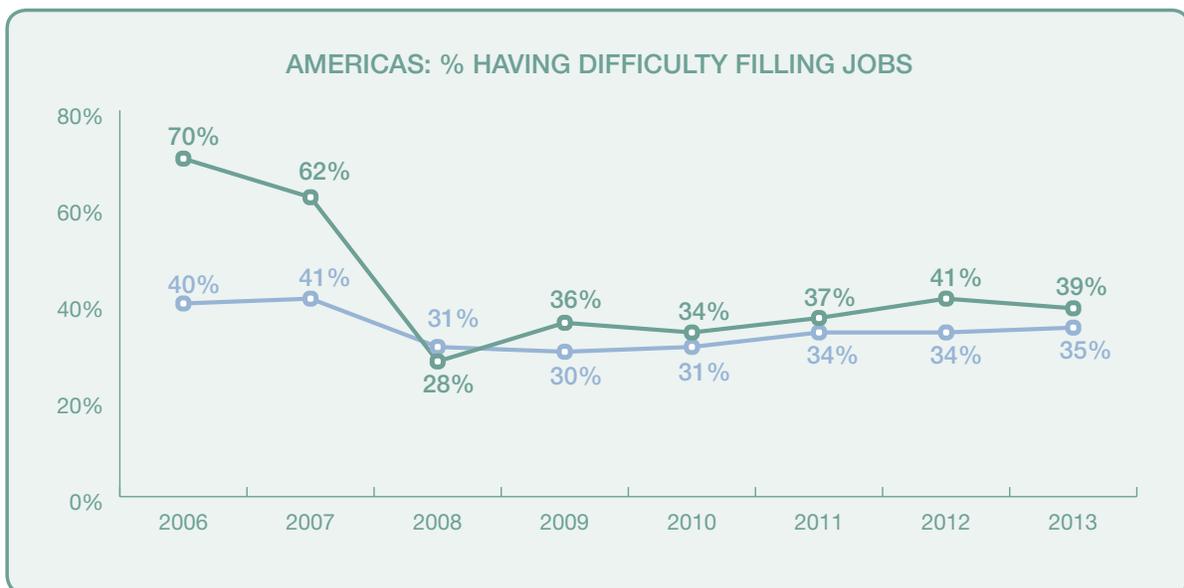


FIGURE 13

Year-over-year, the proportion of employers reporting hard-to-fill vacancies has not grown substantially in any of the region's 10 surveyed countries. However, figures have declined by considerable margins in three countries: in Peru, the proportion drops by 13 percentage points, by 10 percentage points in the U.S. and by 9 percentage points in Panama.

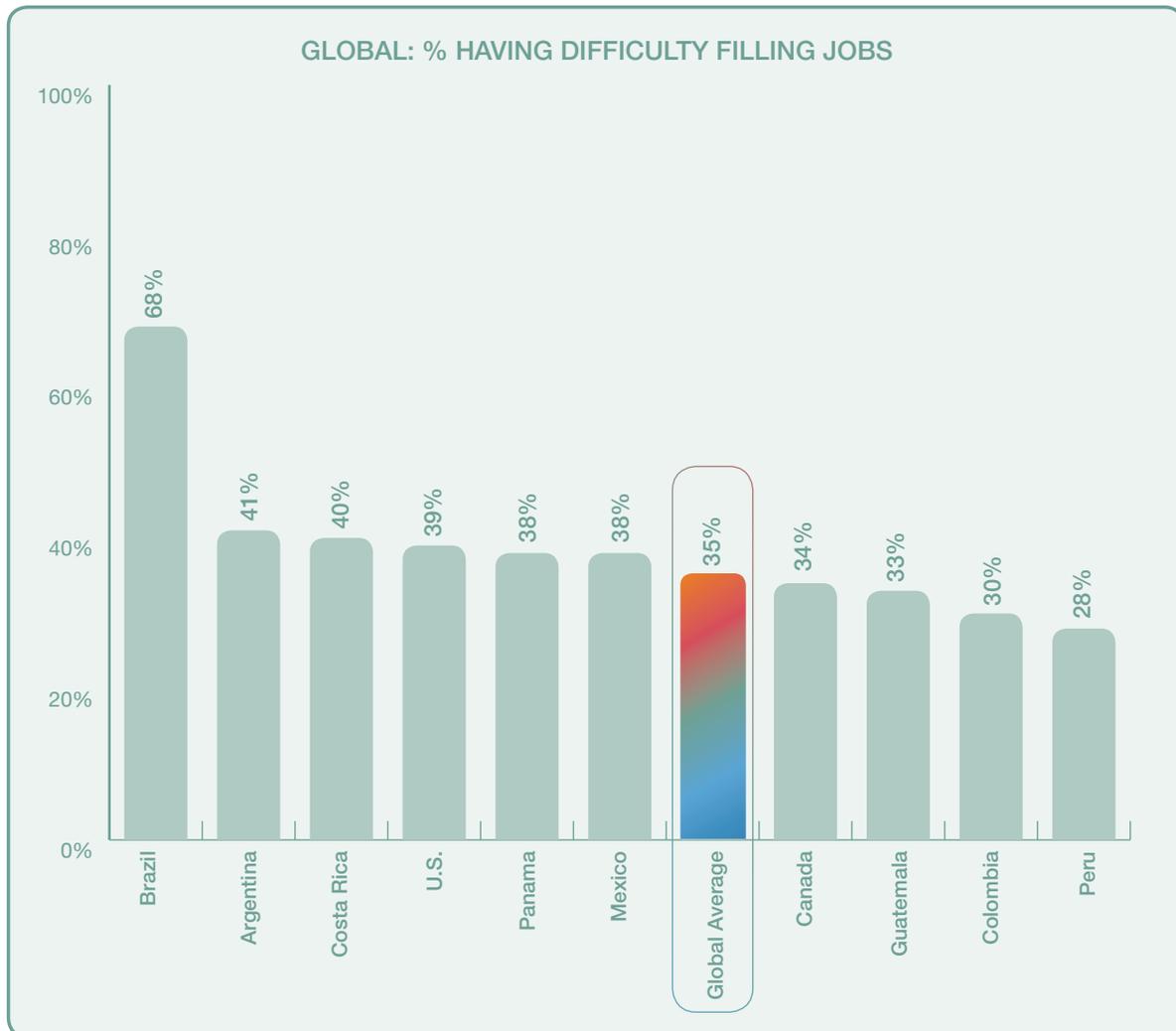


FIGURE 14

WHAT IS THE ONE JOB EMPLOYERS HAVE THE MOST DIFFICULTY FILLING?

Technician vacancies are the most hard-to-fill in the Americas in 2013, replacing engineering jobs at the top of the ranking

Technician vacancies return to the top of the list according to employers in the Americas region. With the exception of the 2012 survey when engineers topped the rankings, technician roles have been the most difficult-to-fill since 2008. This year, engineering roles slip to third, behind sales representatives which climbs to second place following its third-place ranking in 2012. (Figure 15)

Skilled trades workers are placed fourth on the list for the second consecutive year, followed by production operators in fifth as in 2012. Sixth on the list is the accounting and finance staff category switching places with the secretaries/PAs/administrative assistants/office support category, now positioned seventh. The remaining three places in the top ten for the Americas are filled by drivers, laborers and management/executive staff, respectively.

AMERICAS: TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

- 1 | TECHNICIANS
- 2 | SALES REPRESENTATIVES
- 3 | ENGINEERS
- 4 | SKILLED TRADES WORKERS
- 5 | PRODUCTION OPERATORS
- 6 | ACCOUNTING & FINANCE STAFF
- 7 | SECRETARIES, PA'S, ADMINISTRATIVE ASSISTANTS &
OFFICE SUPPORT STAFF
- 8 | DRIVERS
- 9 | LABORERS
- 10 | MANAGEMENT/EXECUTIVES

FIGURE 15

WHY EMPLOYERS ARE HAVING DIFFICULTY FILLING JOBS

Candidates lacking necessary hard skills and a more general lack of applicants are the two key reasons why employers in the Americas are facing talent shortages.

The reasons cited by employers for skills shortages in the Americas are similar to the global responses. One in three employers (33%) name a lack of technical/hard skills as the key reason for their difficulties, although this is a slightly lower proportion than in 2012 (36%). The hard skills shortage is most commonly explained as a lack of industry-specific professional qualifications or a lack of industry-specific skilled trades certifications. (Figure 16)

As in the 2012 survey, employers counted a simple lack of applicants among the top two reasons behind the skills gaps they face. However, the lack of applicants was named by a slightly smaller proportion of employers this year (31%) compared to the 36% who selected it last year. Similarly, a lack of experienced candidates was a concern for 31% of employers in 2012, but has declined to 24% in 2013. Meanwhile, the proportion of employers reporting a lack of soft skills in the labor market remains relatively stable (16%) in comparison to last year. The soft skill of greatest concern is a lack of enthusiasm and motivation on the part of candidates.

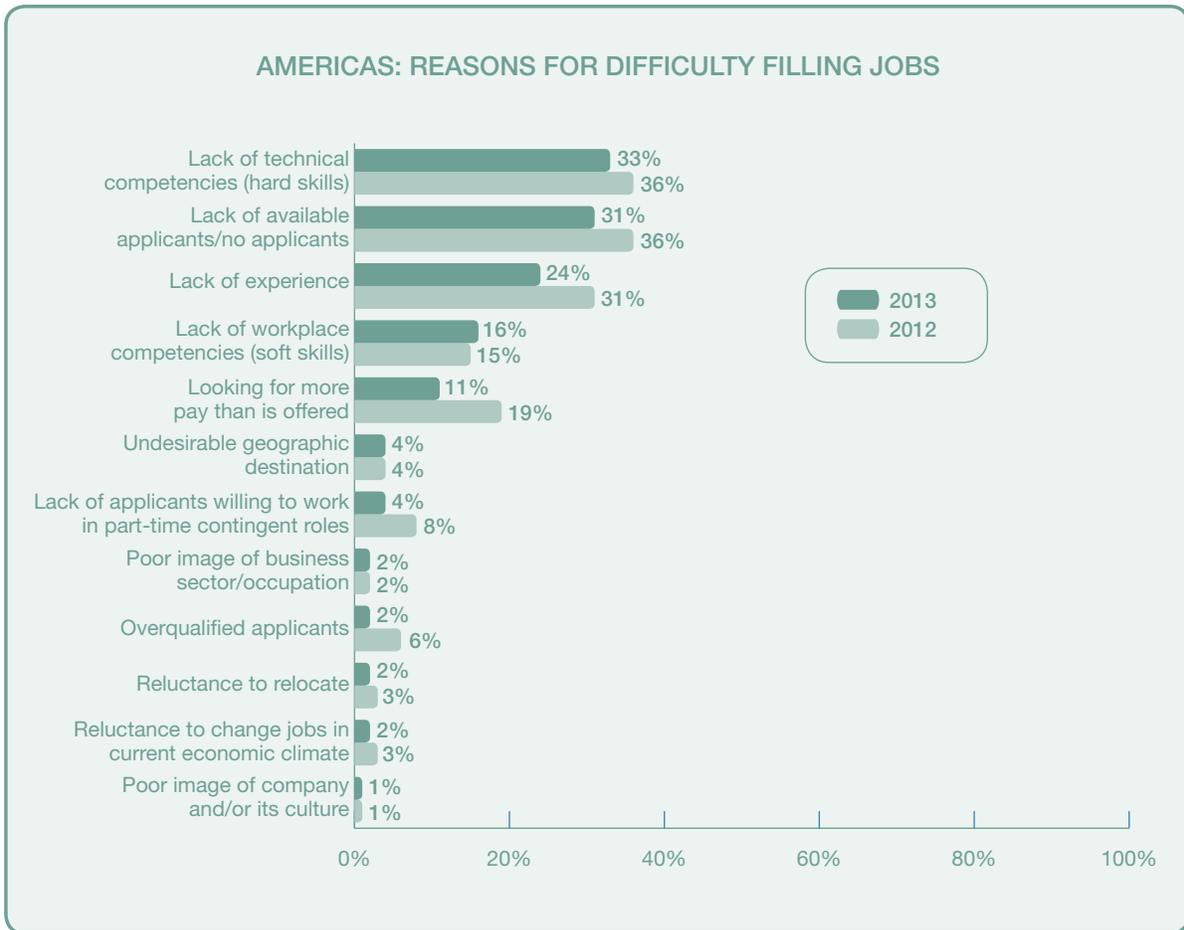


FIGURE 16

There is a notable decline in the proportion of hiring managers who explain talent shortages in terms of candidates seeking more pay than is offered, down from 19% in 2012 to 11% in 2013. The proportion of hiring managers who say they can't find enough applicants willing to take on contingent or part-time roles has also declined from 8% in 2012 to only 4% this year.

WHAT DEGREE OF IMPACT DO TALENT SHORTAGES HAVE ON THE ABILITY TO SERVE CLIENTS?

The impact of hard-to-fill vacancies on client service delivery is most severe in Brazil, according to employers

Among employers who report talent shortages in the Americas region, 19% say this is having a high impact on their ability to meet client needs, with a further 33% reporting a medium level of impact. Only around one in eight (13%) believe talent shortages have no current impact on client service delivery. (Figure 17)

The severity of impact caused by talent shortages varies considerably across the region. In Brazil, 78% report a high or medium impact on the ability to meet client needs, while similar concerns are reported by just 34% of Peruvian employers.

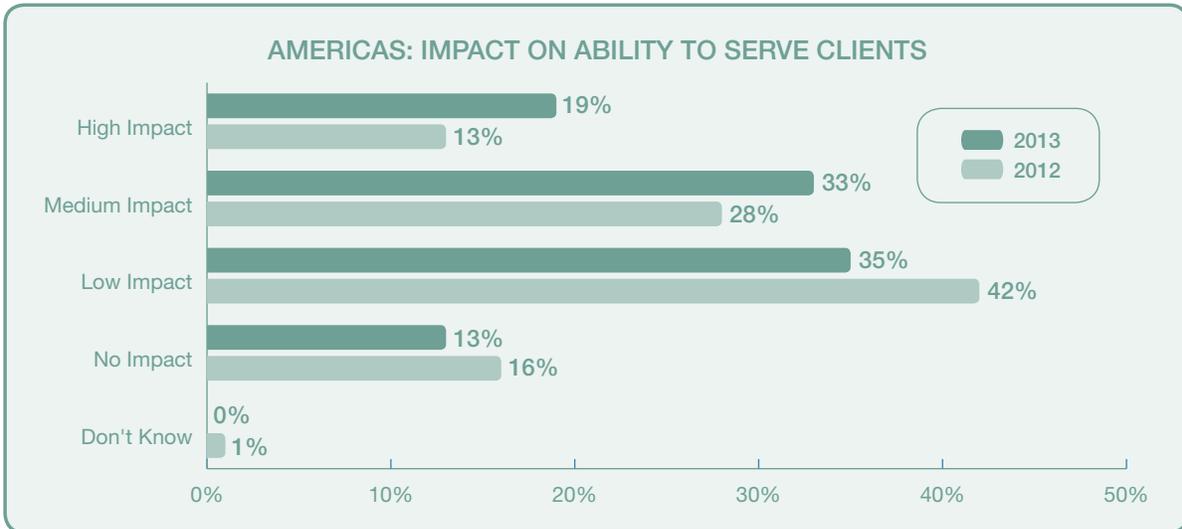


FIGURE 17

HOW TALENT SHORTAGES IMPACT THE OVERALL ORGANIZATION

The issue of most concern for employers in the Americas is how talent shortages undermine their ability to serve clients, closely followed by concern about the impact skills gaps have on competitiveness and productivity

In the Americas, the problems associated with talent shortages are similar to those reported elsewhere across the globe. Hiring managers are most concerned about the impact talent shortages have on their ability to serve clients (39%), while approximately one in three (34%) say failure to fill vacancies reduces competitiveness and productivity. Nearly three in ten employers (29%) believe that shortages lead to increased employee turnover. Other identified consequences of talent shortages include higher compensation costs (23%), lower employee morale (21%) and reduced innovation and creativity (18%). (Figure 18)



FIGURE 18

However, a comparison throughout the region indicates that employer concerns are not uniform. The issue of most concern to employers in the Americas – reduced ability to serve clients—tops the list in five of the 10 countries in the region—Canada, Costa Rica, Mexico, Panama and the U.S. For Brazilian employers, talent shortages are most associated with increased employee turnover, while reduced competitiveness tops the concerns of employers in both Peru and Guatemala.

WHAT STRATEGIES DO EMPLOYERS PURSUE TO OVERCOME TALENT SHORTAGES?

Employers in the Americas tend to address talent shortages by upskilling their existing workforce or by adopting other measures to enhance their talent pipeline

Among the employers who currently report talent shortages, 46% address the challenge by adopting new people practice strategies, while 31% are using modified work models. Approximately one in five (21%) are seeking to source talent differently. In a proportion similar to the global responses, 20% say they are not currently pursuing any specific strategy to deal with skills gaps. (Figure 19)

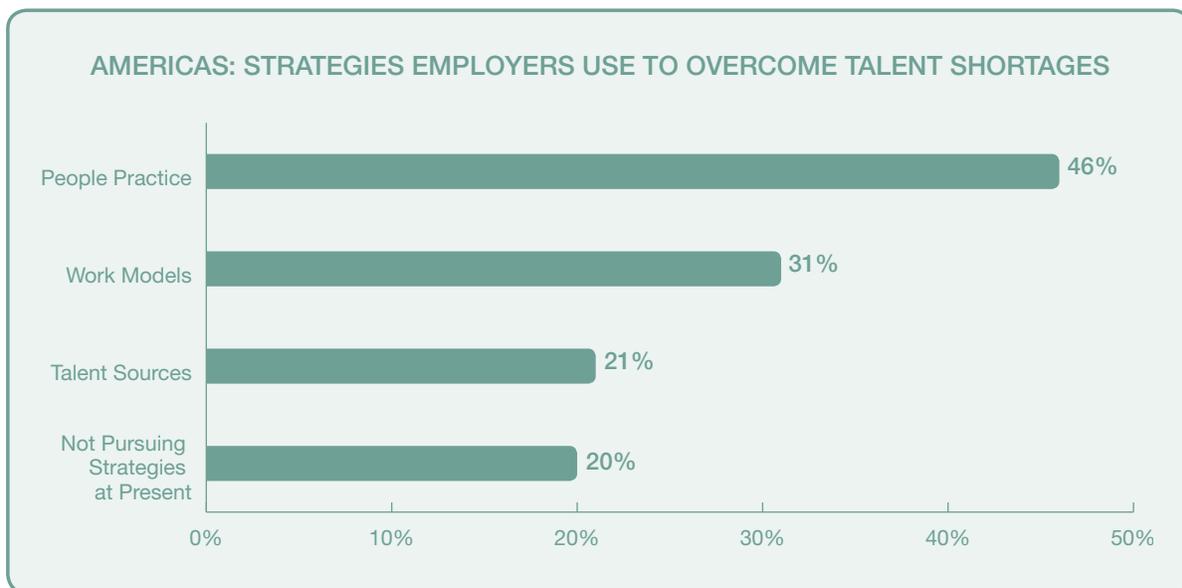


FIGURE 19

Slightly less than a third of the hiring managers who report skills gaps indicate they use people practice solutions to mitigate talent shortages in their local labor market. (Figure 20) More than one in four (26%) hiring managers indicate they offer additional training and development to existing staff. Another 9% have redefined qualifying criteria to include individuals who may lack some key skills but also have the potential to acquire them. Some employers report using non-traditional recruiting practices (7%) and some have implemented reward-focused approaches, such as offering enhanced benefits (6%) and increasing starting salaries (5%).

Among employers who base their strategies on work models, (Figure 21) the most frequent approach is to increase the focus on the talent pipeline (16%) such as identifying high potentials

and building a succession management plan. In addition, 8% say they are redesigning current work procedures, for example to allow for work to be shared between colleagues and/or departments, and 4% are offering more flexible working arrangements such as virtual work or flex time.

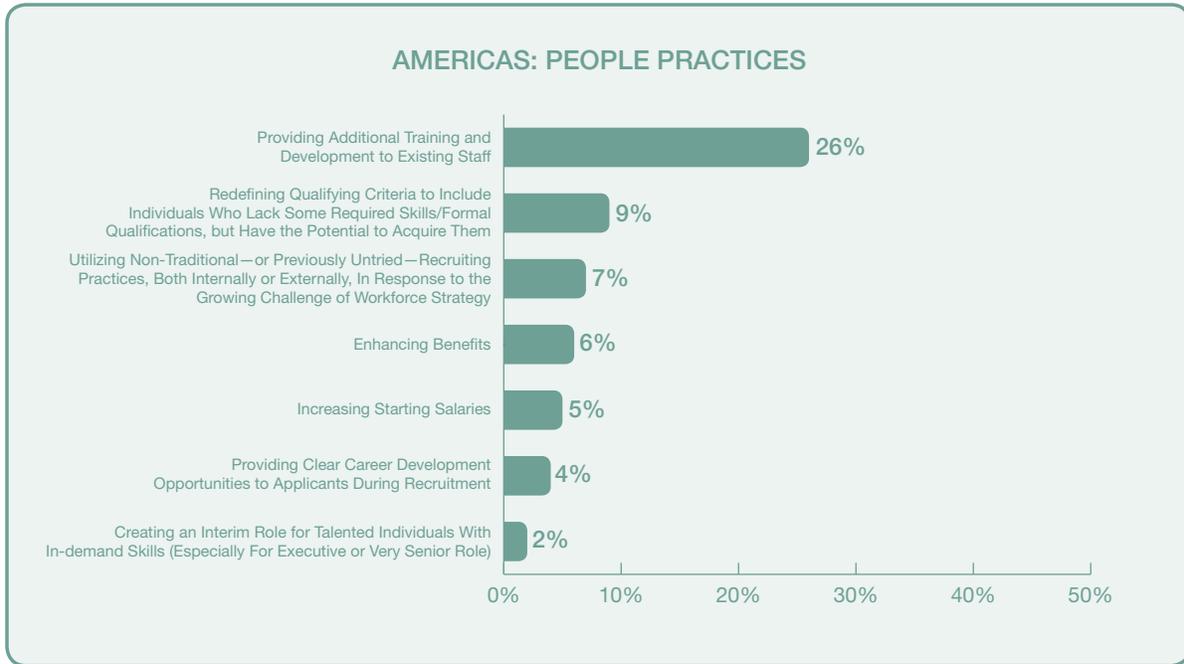


FIGURE 20

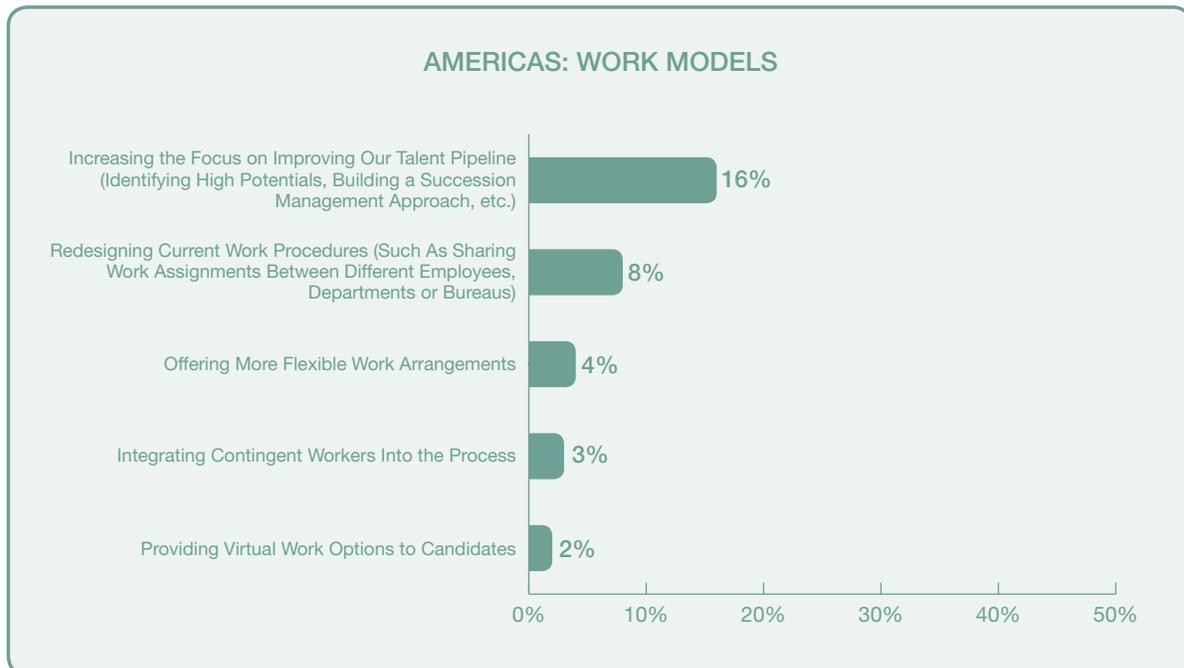


FIGURE 21

Strategies which involve talent sourcing solutions are most likely to involve recruiting from previously untapped talent pools (8%) and/or appointing candidates who don't currently have the required skills but do have the potential to develop (8%). (Figure 22) For employers in the Americas, candidates outside the local region form the most attractive new talent pool to tap into (4%). Another strategy used by some employers is to partner with local educational institutions to ensure that the curriculum is aligned to the firm's talent needs (7%).

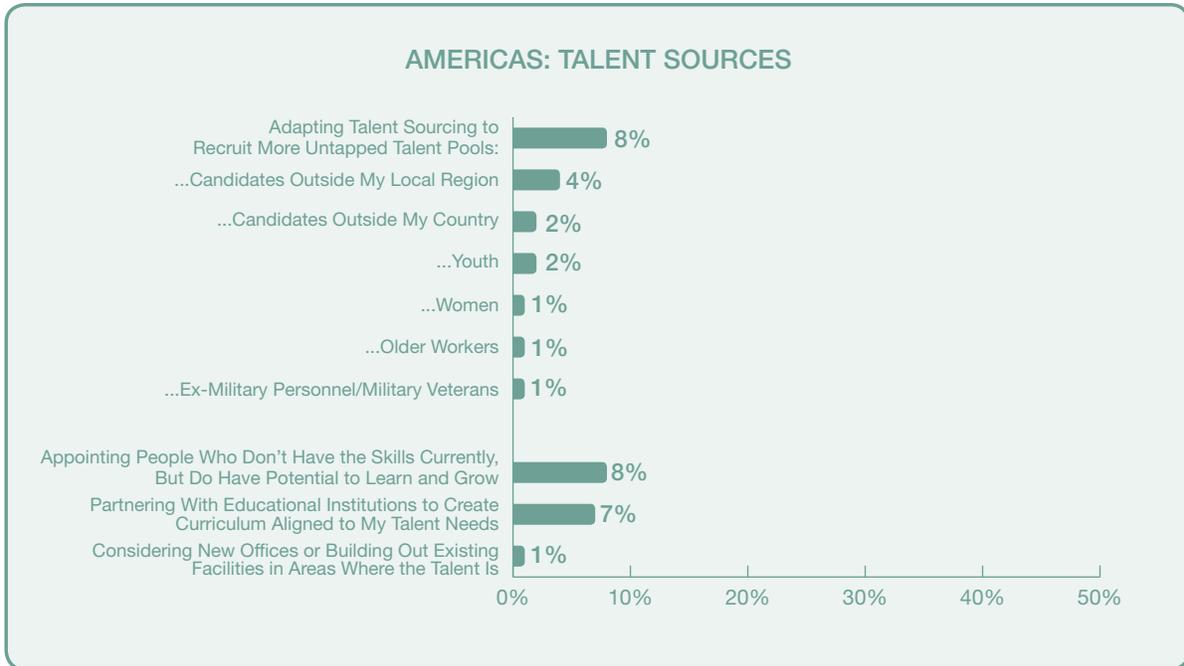


FIGURE 22

ASIA PACIFIC

HOW MUCH DIFFICULTY DO EMPLOYERS HAVE FILLING JOBS DUE TO LACK OF AVAILABLE TALENT?

For the first time in the series of eight annual talent shortage surveys, more than half (51%) of the Asia Pacific employers surveyed say skills gaps are posing difficulties in the hiring process. Survey responses come from nearly 8,600 hiring managers in Australia, mainland China, Hong Kong, India, Japan, New Zealand, Singapore and Taiwan.

When compared with 2012, the proportion of employers reporting talent shortage problems increases by 6 percentage points from 45%. (Figure 23) As in 2012, Japanese employers (85%) report the most serious talent shortages globally, and the inability to source the right people is also a concern for more than six in ten Indian employers (61%) in 2013. Meanwhile, Chinese employers (35%) are the least likely to report talent shortages in the region; the proportion is identical to the average for all surveyed countries and territories.

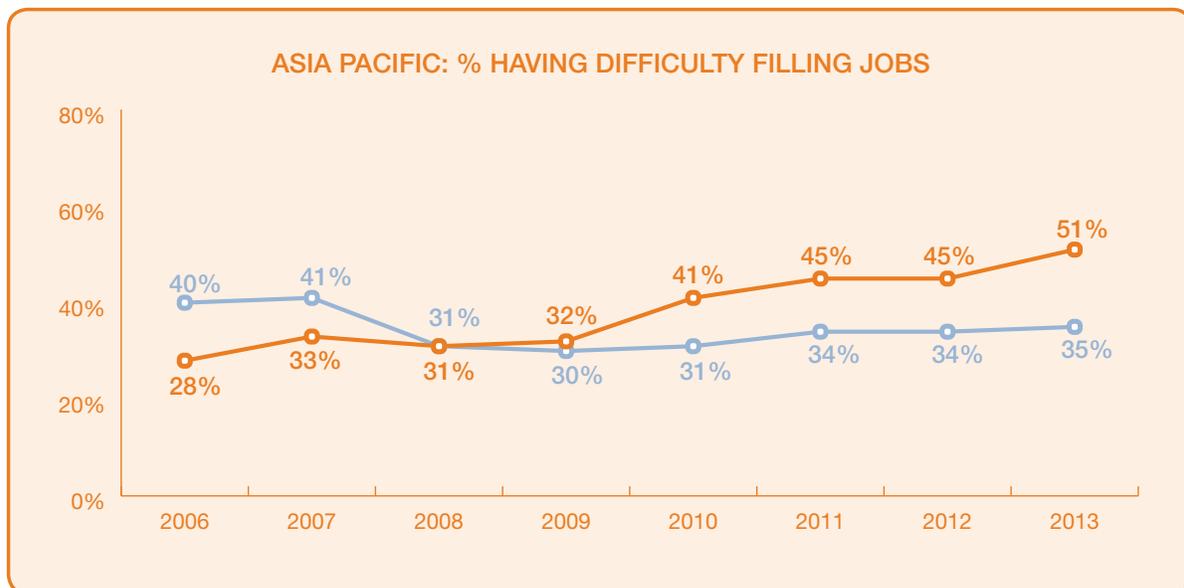


FIGURE 23

WHAT IS THE ONE JOB EMPLOYERS HAVE THE MOST DIFFICULTY FILLING?

The top three most-difficult-to-fill talent categories are identical to those reported in 2012: Sales representatives continue to be the most challenging position to fill in the Asia Pacific region, followed by the engineering and technician categories. The sales representative role has topped the Asia Pacific list every year in the series of surveys, from 2006 through 2013. (Figure 25)

Employers also report a growing concern over the availability of candidates for management/executive posts, with the category climbing from seventh to fourth on the list year-over-year. The

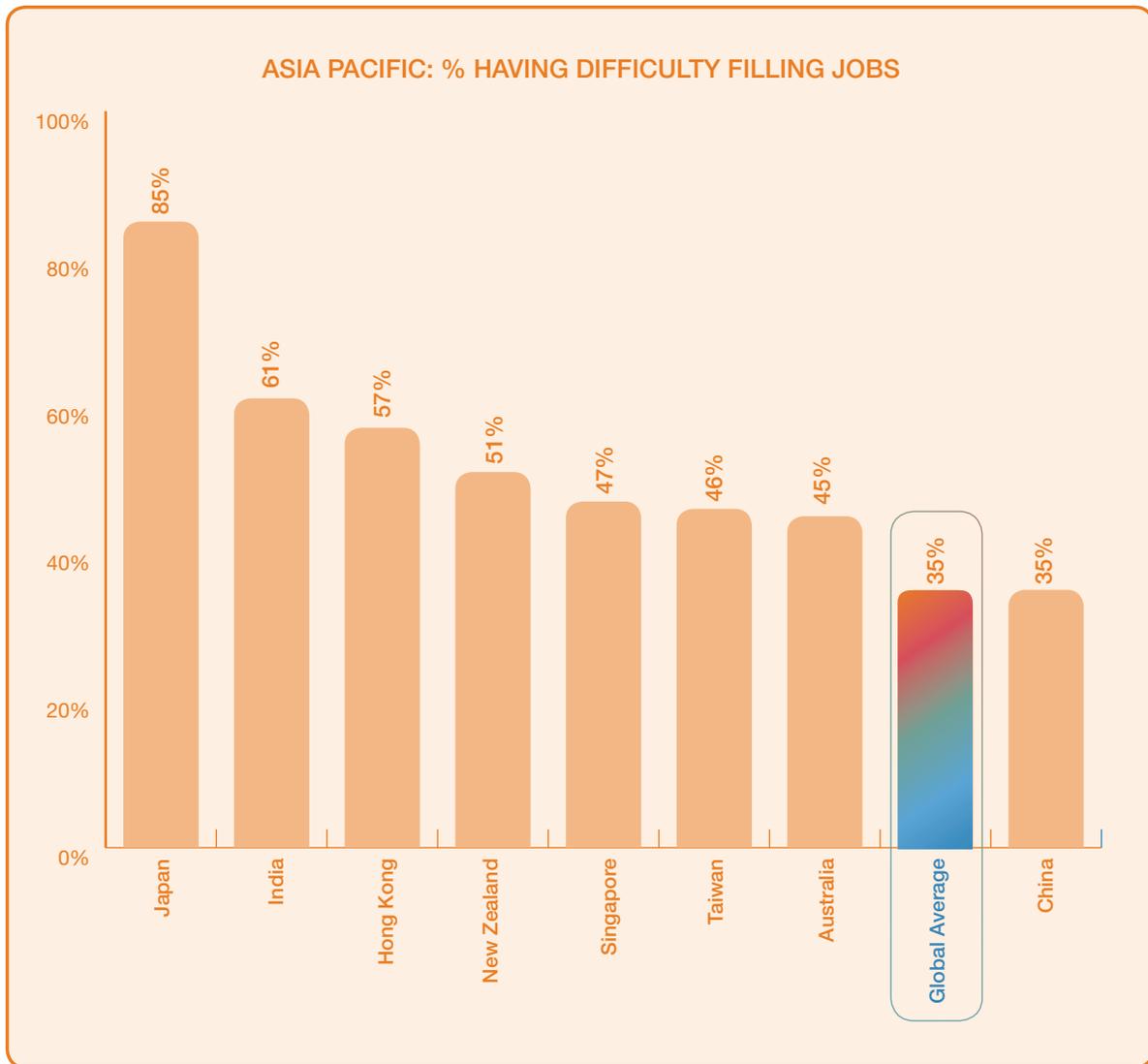


FIGURE 24

accounting and finance staff category also moves up the list into fifth spot, displacing the IT staff category, which is now sixth. Skilled trades workers were fourth on the list in 2012, but are now seventh. The remaining three categories in the top 10 for Asia Pacific are sales managers, laborers and researchers (R&D).

WHY EMPLOYERS ARE HAVING DIFFICULTY FILLING JOBS

Employers report the key reason for talent shortages in Asia Pacific is a simple lack of applicants, although a lack of technical skills among candidates is also an increasingly common concern

As in 2012, an overall lack of applicants is the most commonly reported challenge among employers facing a talent shortage in Asia Pacific. Almost a third (32%) say this is a concern, although this proportion declines three percentage points when compared with the previous year. A close second on the list of reasons behind the skills gaps is the lack of technical competencies among

labor market candidates (31%, up two percentage points on 2012). Employers who cite a lack of technical/hard skills are most likely to say the shortage is due to either a lack of relevant professional qualifications or skilled trades certifications. (Figure 26)



FIGURE 25

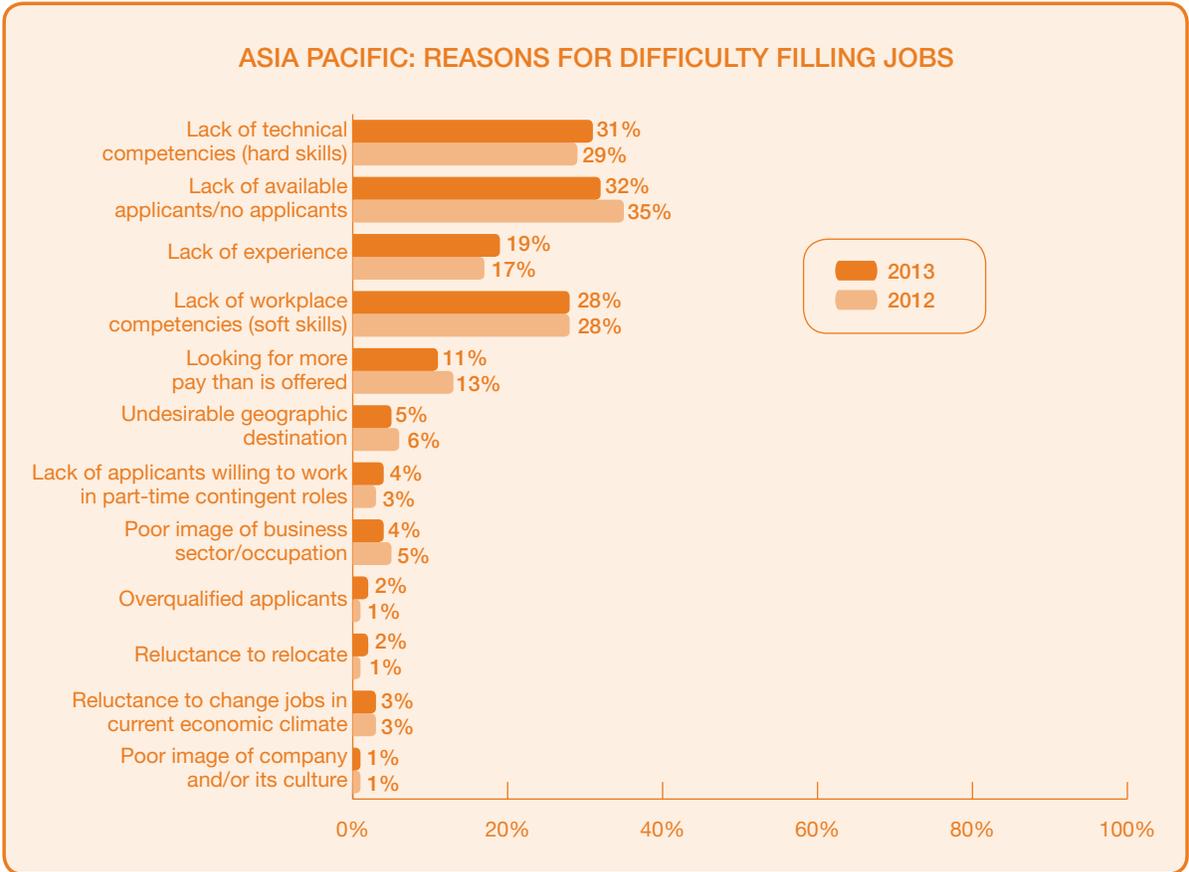


FIGURE 26

Nearly three in ten (28%) hiring managers—a percentage unchanged when compared with 2012—cite a shortage of soft skills as a factor contributing to the skills gap in their labor markets. Candidates are most likely to be falling short of employer expectations for a perceived lack of flexibility, adaptability, enthusiasm and motivation. In 2012, 12% of employers reported a lack of interpersonal skills, but this has declined to 6% in 2013.

The proportion of employers who report candidates lacking experience (19%) as a shortcoming is slightly higher in 2013 than the previous year (17%). However, reported instances of candidates looking for more pay than is offered (11%) is slightly lower than in 2012 (13%).

WHAT IS THE DEGREE OF IMPACT TALENT SHORTAGES HAVE ON THE ABILITY TO MEET CLIENT NEEDS?

Talent shortages have the most impact on the ability to meet client needs in China, Hong Kong and Japan

Three in five Asia Pacific employers who are facing talent shortages at this point in time believe this is having a high (17%) or medium (43%) impact on the ability to meet client needs. A further 26% say talent shortages have a low impact on client-facing activity, while 13% feel service is not affected by the inability to fill particular roles. (Figure 27)

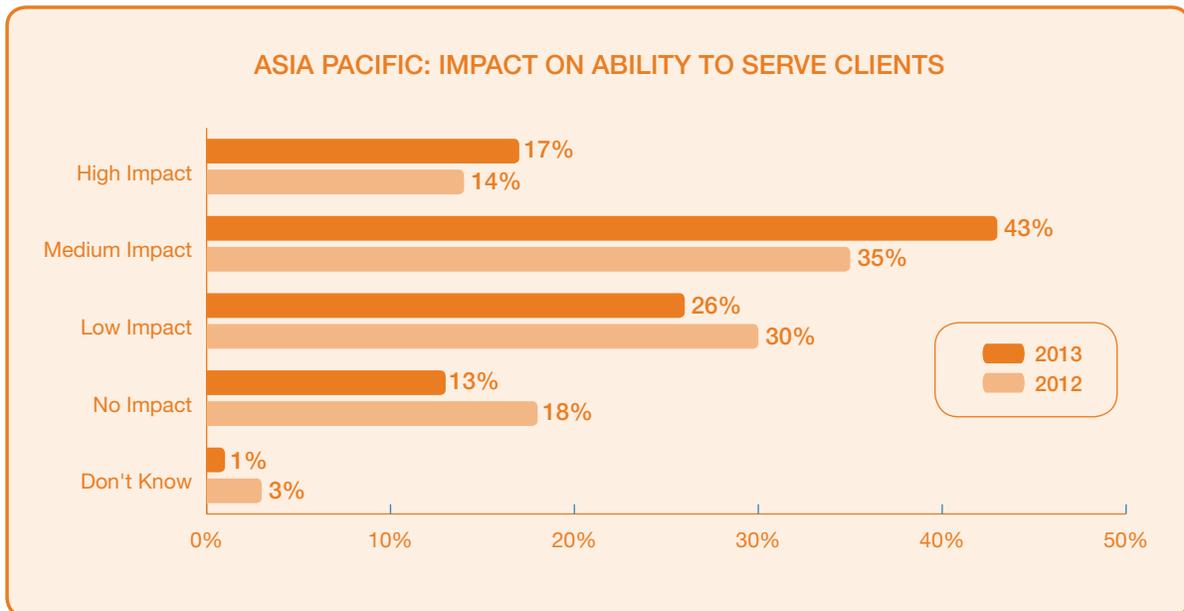


FIGURE 27

Levels of concern about the impact of talent shortages on service delivery varies widely across the different countries and territories in the region. A large majority of employers facing a skills shortage issue in China (86%), Hong Kong (86%) and Japan (85%), believe this is having a medium or high impact on client service. Meanwhile, the corresponding figures for India (29%) and Taiwan (33%) are considerably lower.

HOW TALENT SHORTAGES IMPACT THE OVERALL ORGANIZATION

Reduced ability to serve clients is the top concern for employers in Australia and New Zealand, while reduced competitiveness is cited first by employers in Japan, Hong Kong and Taiwan

Employers in the Asia Pacific region are almost evenly split on how the inability to fill key vacancies impacts their businesses. Reduced competitiveness and productivity is named by 41% of employers, while 40% cite a reduced ability to serve clients. One in four believe that skills gaps result in reduced innovation and creativity, 24% report a negative impact on employee morale, and 23% cite increased employee turnover. Less than one in five (18%) name higher compensation costs as a consequence of talent shortages in key areas. (Figure 28)

“As in 2012, an overall lack of applicants is the most commonly reported challenge among employers facing a talent shortage in Asia Pacific.”

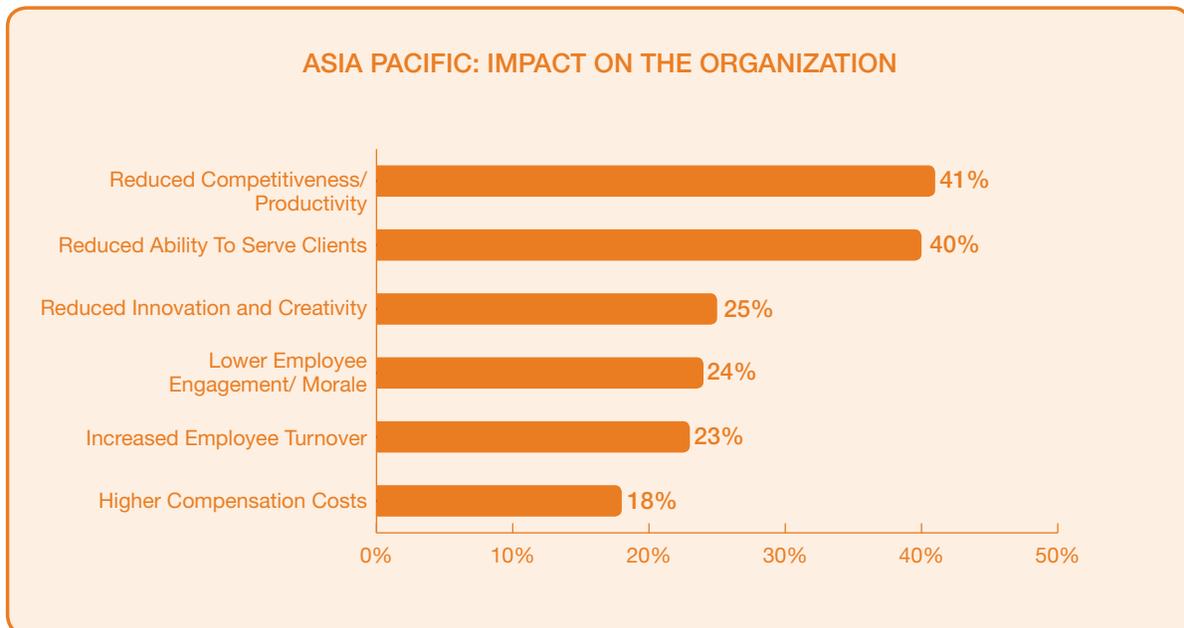


FIGURE 28

In both Australia and New Zealand, employers believe talent shortages reduce their ability to serve clients, while the impact on competitiveness and productivity tops the list in Taiwan, Japan and Hong Kong. Chinese employers place equal emphasis on both of these issues when assessing how skills gaps can damage their business performance. Elsewhere, the main concern in India is the reduction in innovation and creativity, while the top concern for Singapore is increased employee turnover.

WHAT STRATEGIES DO EMPLOYERS PURSUE TO OVERCOME TALENT SHORTAGES?

Asia Pacific employers plan to tap into new talent pools, extend training and development for existing staff and increase their focus on the talent pipeline to address the growing talent shortages in the region

In Asia Pacific—where employers are most likely to face a talent shortage—44% of firms adopt people practice strategies, 33% are changing their approach to talent sourcing and 29% are modifying work models in order to address the skills gap. A minority (14%) of hiring managers say they do not yet have a formulated strategy to address talent shortages, but this proportion is well below the global average. (Figure 29)

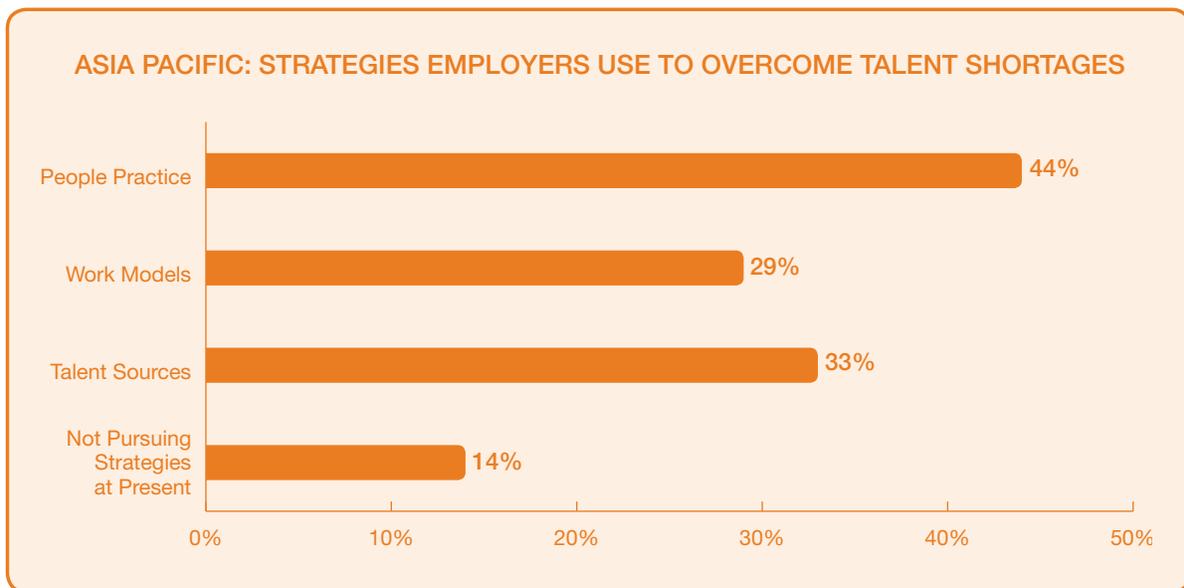


FIGURE 29

Almost one in five (19%) Asia Pacific employers with a talent shortage issue are offering additional training and development to current staff to help fill the gaps, while 11% are utilizing non-traditional recruiting practices, both internally and externally. Other approaches based on people practices include redefining qualifying criteria to include candidates who may currently lack some skills but have potential to acquire them (7%), enhancing benefits packages (7%) and offering increased starting salaries (7%). (Figure 30)

Seeking new talent outside existing talent pools (22%) is also a key part of the strategy for many Asia Pacific employers. Candidates from outside the country (8%) and from outside the local region (7%) are most likely to be targeted, along with younger people (5%). Some employers are seeking to partner with local educational institutions to ensure the curriculum is aligned with their talent needs (7%), and 6% are appointing people who don't yet have all the required skills but do have potential to develop. (Figure 31)



FIGURE 30



FIGURE 31

Those employers whose approach includes modified work models are most likely to focus on improving their talent pipeline, such as identifying high potentials and building a succession management plan (17%). Other strategies include offering more flexible working arrangements (5%), integrating contingent workers into the process (5%) and redesigning current work procedures (5%). (Figure 32)

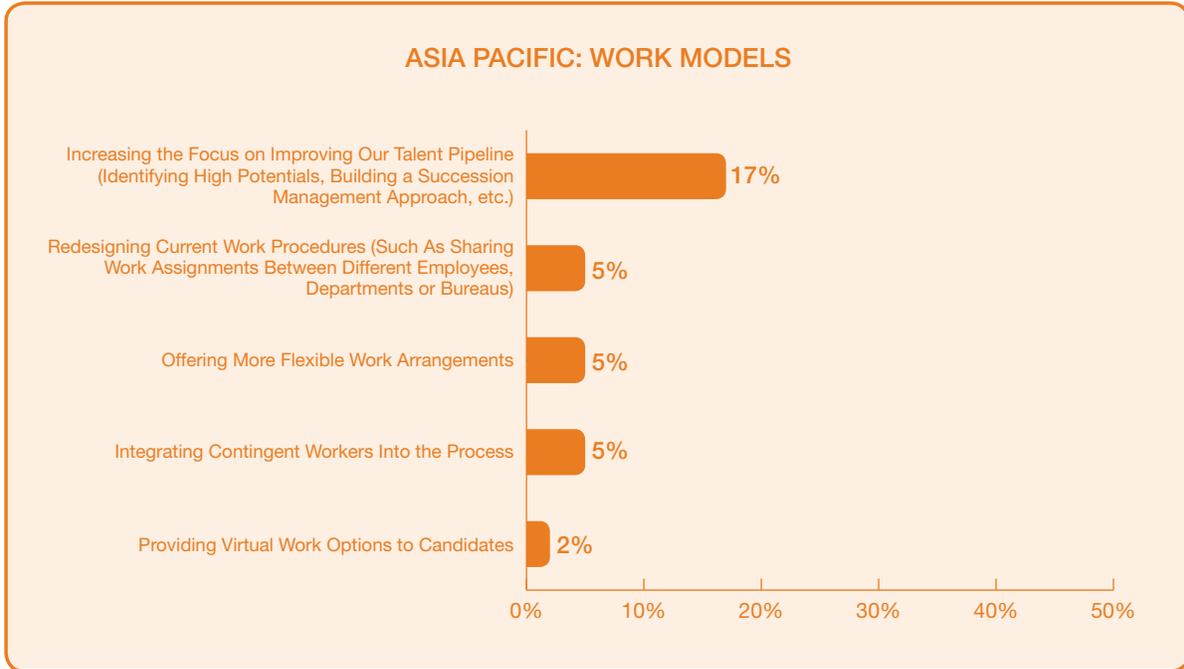


FIGURE 32

EMEA

HOW MUCH DIFFICULTY DO EMPLOYERS HAVE FILLING JOBS DUE TO LACK OF AVAILABLE TALENT?

Over 20,000 employers from 24 countries in the Europe, Middle East & Africa (EMEA) region were interviewed for the 2013 Talent Shortage Survey. For the most part, the talent shortage is less of a concern among employers in EMEA than in the other two regions surveyed. This isn't surprising given the region's current economic challenges—particularly through much of Europe. However, the survey reveals that skills shortages are more severe in some of the region's countries, including Turkey, Bulgaria and Romania.

In 2013, more than one in four EMEA employers (26%) struggle to fill jobs due to talent shortages. The figure has increased by a single percentage point since 2012, but the overall proportion remains lower than in the years before the economic downturn. However, the challenges associated with talent shortages vary considerably across the region. Employers in Turkey (58%), Bulgaria (54%) and Romania (54%) are most likely to report difficulties filling vacancies, and the talent shortage remains a pressing issue in Israel (50%). (Figure 33)

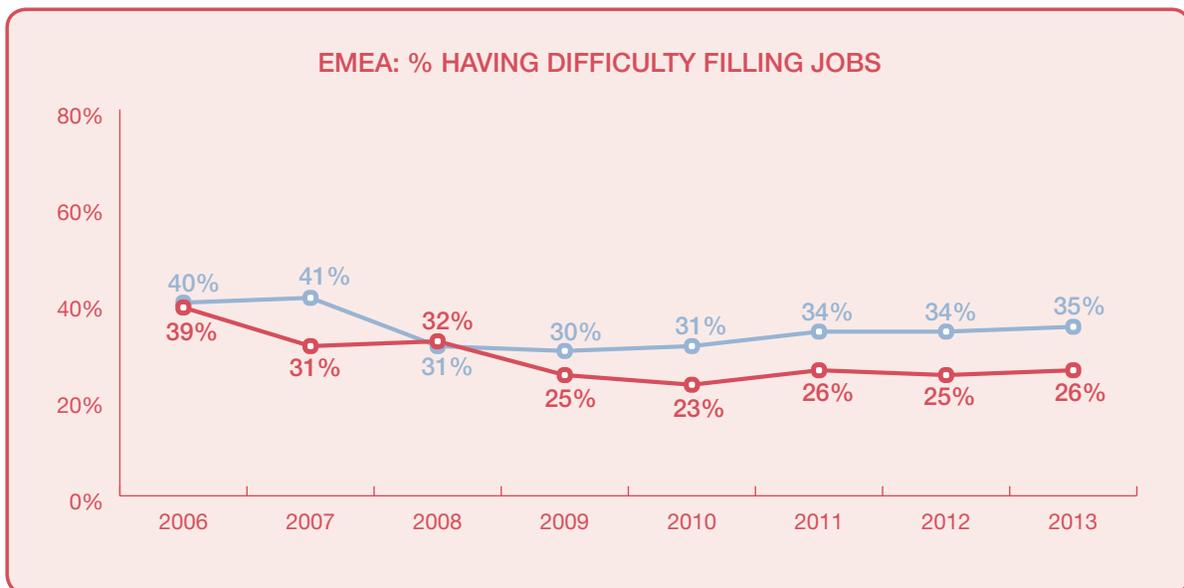


FIGURE 33

Meanwhile, when the global list of 42 countries and territories is ranked by the proportion reporting talent shortage issues, EMEA countries occupy the bottom 13 places. Talent shortages are least likely to be identified as an employer concern in Spain (3%) and Ireland (3%), and also have a low impact on employers in South Africa (6%), the Czech Republic (9%) and the Netherlands (9%).

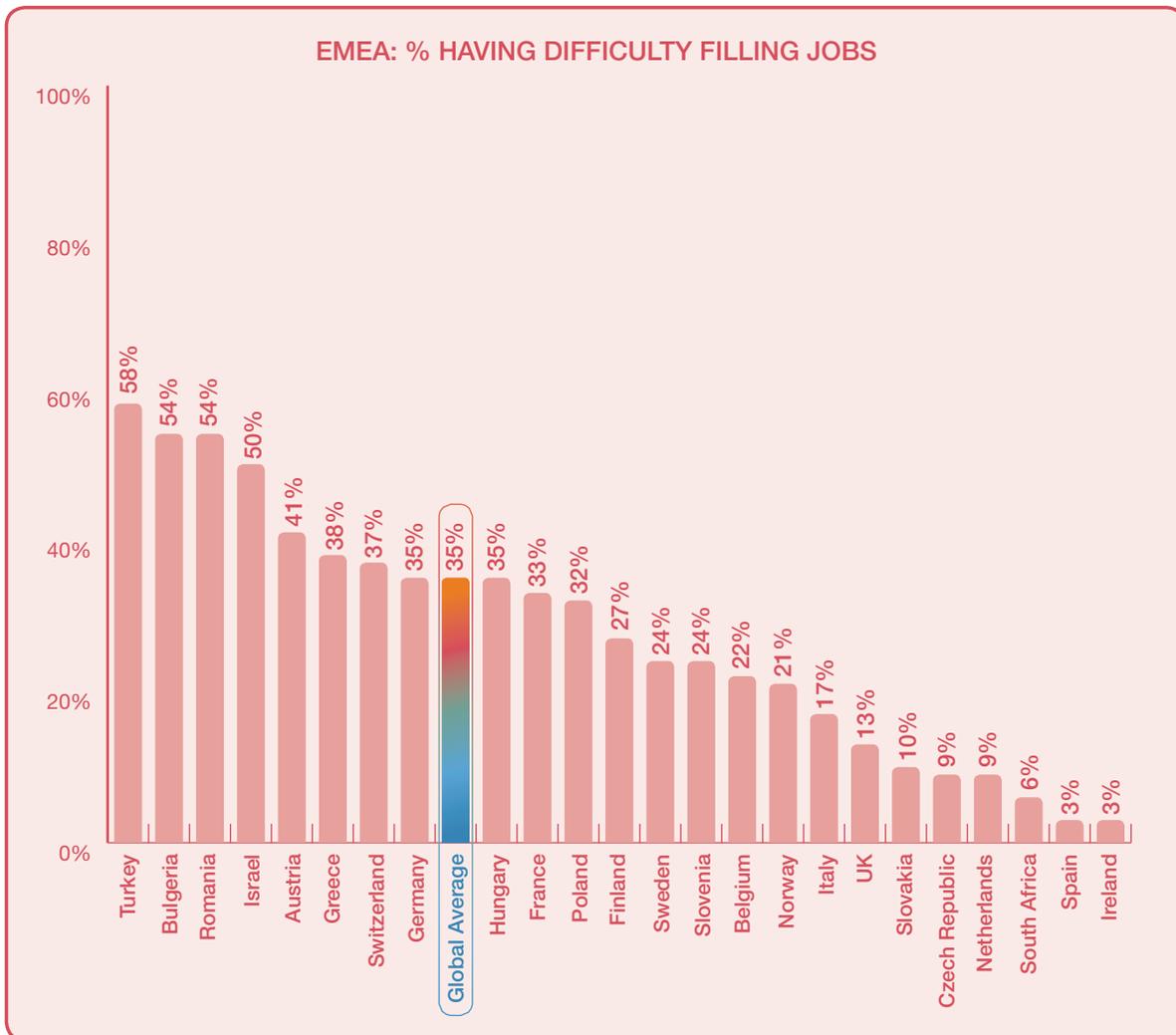


FIGURE 34

When compared with the 2012 survey, hard-to-fill vacancies have become more of an issue in several EMEA labor markets. In Turkey, the proportion of hiring managers who say they face a talent shortage is 17 percentage points higher and increases by 14 percentage points in Israel. In Greece, despite the generally weak economy, the number of employers facing a lack of candidates with relevant skills has increased by 14 percentage points. Considerable increases of 9 percentage points are also reported in Romania and Switzerland. Meanwhile, the figure reported by Swedish employers is down 12 percentage points, and decreases of 7 percentage points are reported in both Germany and Slovakia.

WHAT IS THE ONE JOB EMPLOYERS HAVE THE MOST DIFFICULTY FILLING?

EMEA employers report the most difficulty filling skilled trades vacancies

Skilled trades workers continue to be the most difficult recruits to locate across the EMEA region. Employers have placed this worker category at the top of the region's list every year since 2007, with

the role ranking first in 15 of the region's 24 countries. As in 2012, the next hardest-to-fill vacancies across the region are for positions in engineering and in sales, ranked second and third, respectively. (Figure 35)

EMEA: TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

- 1 | SKILLED TRADES WORKERS
- 2 | ENGINEERS
- 3 | SALES REPRESENTATIVES
- 4 | MANAGEMENT/EXECUTIVES
- 5 | TECHNICIANS
- 6 | DRIVERS
- 7 | ACCOUNTING & FINANCE STAFF
- 8 | SECRETARIES, PA'S, ADMINISTRATIVE ASSISTANTS & OFFICE SUPPORT STAFF
- 9 | LABORERS
- 10 | IT STAFF

FIGURE 35

The region's employers also report that talent is increasingly in short supply at the management and executive level. The category moves up the rankings from tenth in 2012 to fourth this year. As a result, technicians and drivers both slip down the rankings into fifth and sixth places, respectively. In seventh, the accounting and finance staff category is one place higher than in 2012. Rounding out the top 10 positions in EMEA are secretaries/PAs/administrative assistants/office support, laborers and IT staff.

WHY EMPLOYERS ARE HAVING DIFFICULTY FILLING JOBS

A shortage of candidates with the right technical competencies and a general lack of applicants are both key causes of hard-to-fill vacancies in EMEA – and both have become more prevalent over time

When asked to provide further insight as to why talent shortages were preventing them from filling particular positions, EMEA employers said it was because of a shortage of candidates with relevant technical competencies. This shortcoming was selected by 36% of employers in 2013, up from 34% last year. Almost one in five (19%) hiring managers say they find that candidates lack the relevant professional qualifications (slightly up from 17% in 2012). For the second consecutive year, 15% report that candidates for skilled trades positions lack the necessary experience. (Figure 36)

For the seventh consecutive year, skilled trades have been named the most difficult role to recruit in EMEA.

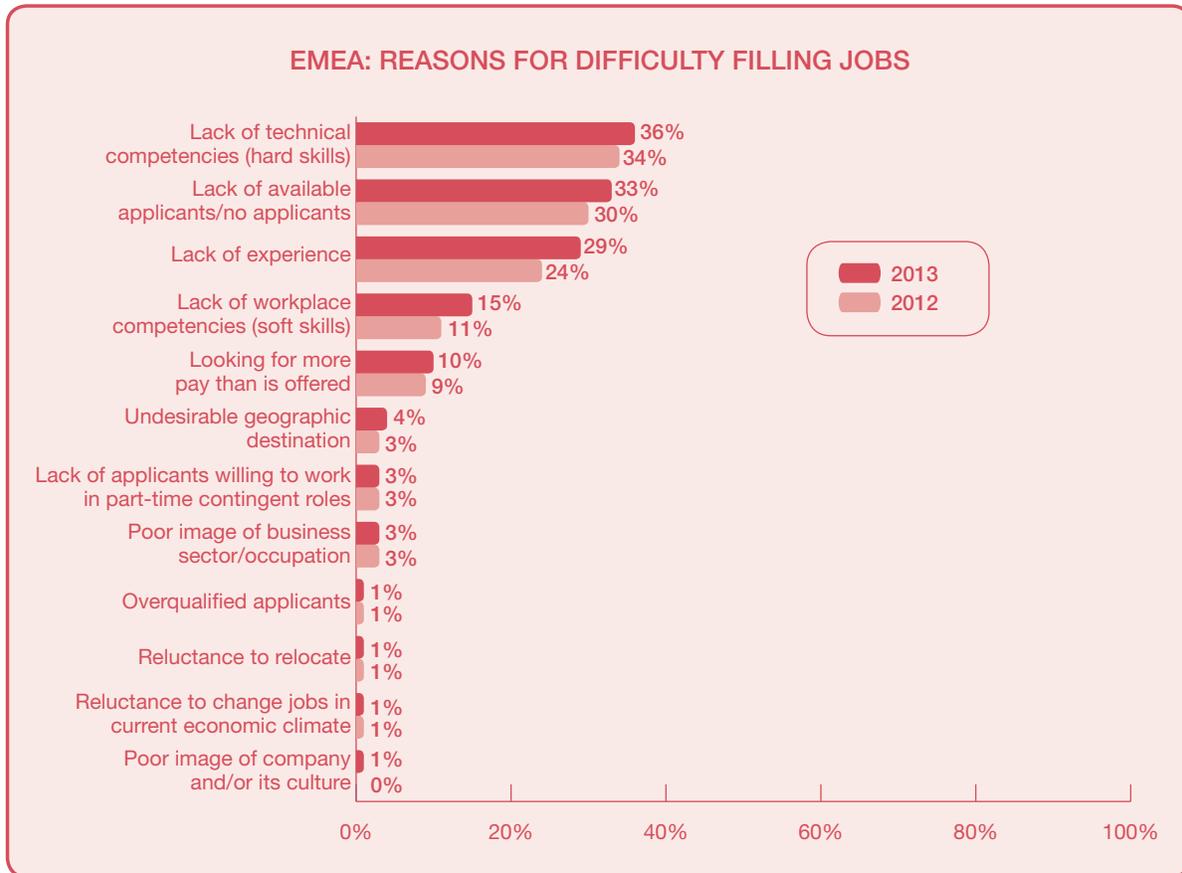


FIGURE 36

One in three employers reports that they simply cannot find enough applicants for particular posts, and this proportion has also climbed—by three percentage points—when compared with 2012. Almost three in ten (29%) say that existing candidates lack experience (up from 24% in 2012). A lack of soft skills among candidates is also becoming more common this year, with 15% of employers encountering this compared with 11% in 2012. The most frequently encountered soft skills issues are lack of enthusiasm/motivation (5%) and a perceived lack of professionalism as indicated by 4% of employers who indicated that candidates fell short in matters of personal appearance and punctuality.

WHAT IS THE DEGREE OF IMPACT TALENT SHORTAGES HAVE ON THE ABILITY TO SERVE CLIENTS?

Half of the EMEA employers who currently face talent shortages say this is having a medium or high impact on ability to meet client needs

Almost one in five (19%) EMEA employers who report any concerns about talent shortage in 2013 say the issue is having a high impact on their ability to meet client needs. A further 31% believe there is a medium impact, while 20% report a low impact. Across the region, however, 29% say that, although they are struggling to fill some vacancies, this is not yet impacting on their ability to deliver to clients as expected. (Figure 37)

The effect of talent shortages on client-facing activity is most pronounced in South Africa (72%) and Romania (69%), where the majority of employers report a medium or high impact. Meanwhile, the

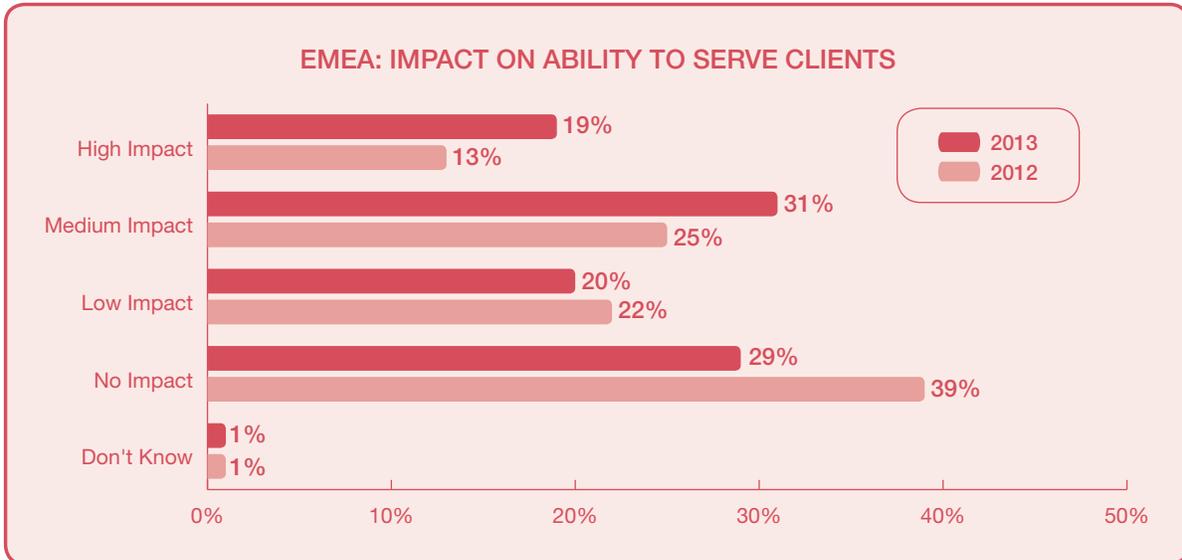


FIGURE 37

corresponding figures for Slovakia (29%), Austria (35%) and Germany (36%) are well below the average.

HOW TALENT SHORTAGES IMPACT THE OVERALL ORGANIZATION

Skills gaps mainly impact the ability to serve clients effectively according to EMEA employers

Among the EMEA employers who report challenges resulting from skills gaps, almost half (48%) say shortages impact their ability to serve clients. In addition, 42% say that skills gaps result in reduced competitiveness and productivity. Almost one in four employers (24%) cite an increase in employee turnover as the main consequence for their business, while 21% say talent shortages result in reduced innovation and creativity. One in five say the inability to fill vacancies results in higher compensation costs and lower employee morale. (Figure 38)

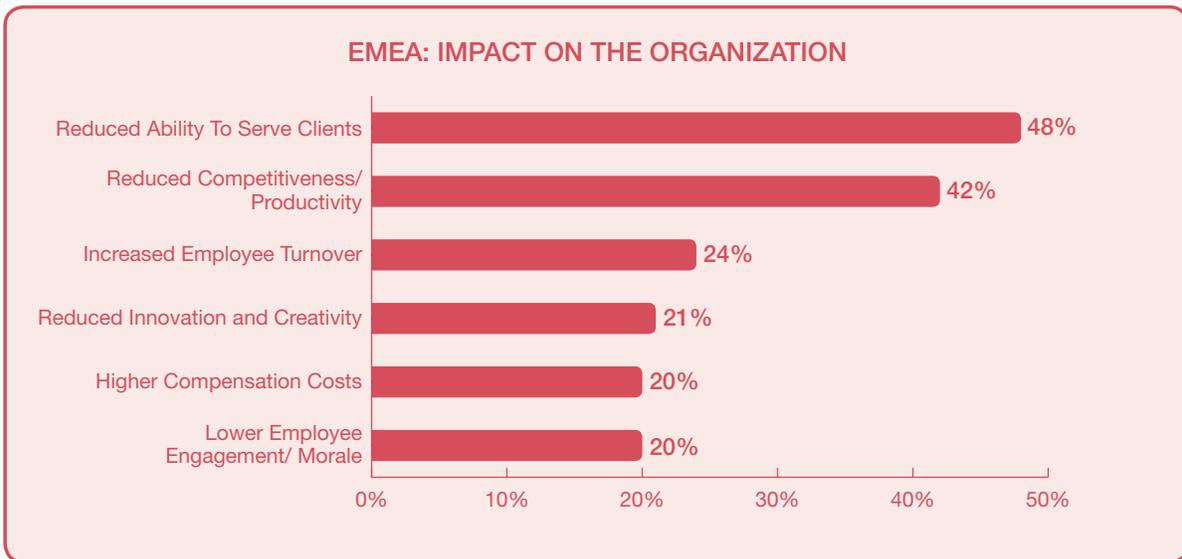


FIGURE 38

Although reduced ability to serve clients tops the list among employers in 18 of the 24 EMEA countries, those in five countries— Czech Republic, Finland, Germany, Romania and Slovenia—are most concerned with the impact talent gaps have on competitiveness and productivity. Meanwhile, Polish employers say that increased employee turnover is the biggest challenge posed by skills gaps.

WHAT STRATEGIES DO EMPLOYERS PURSUE TO OVERCOME TALENT SHORTAGES?

EMEA employers adopt a range of strategies to address talent shortages, most notably upskilling existing staff, although almost three in ten have yet to develop a clear strategy.

More than two in five (44%) EMEA employers who face a talent shortage at present say that their strategic response involves modified people practices, while 22% adopt strategies which focus on work models and 19% include talent sourcing solutions. However, the region has the highest proportion of employers who are facing skills gaps but don't have a strategy to deal with them (29%). (Figure 39)

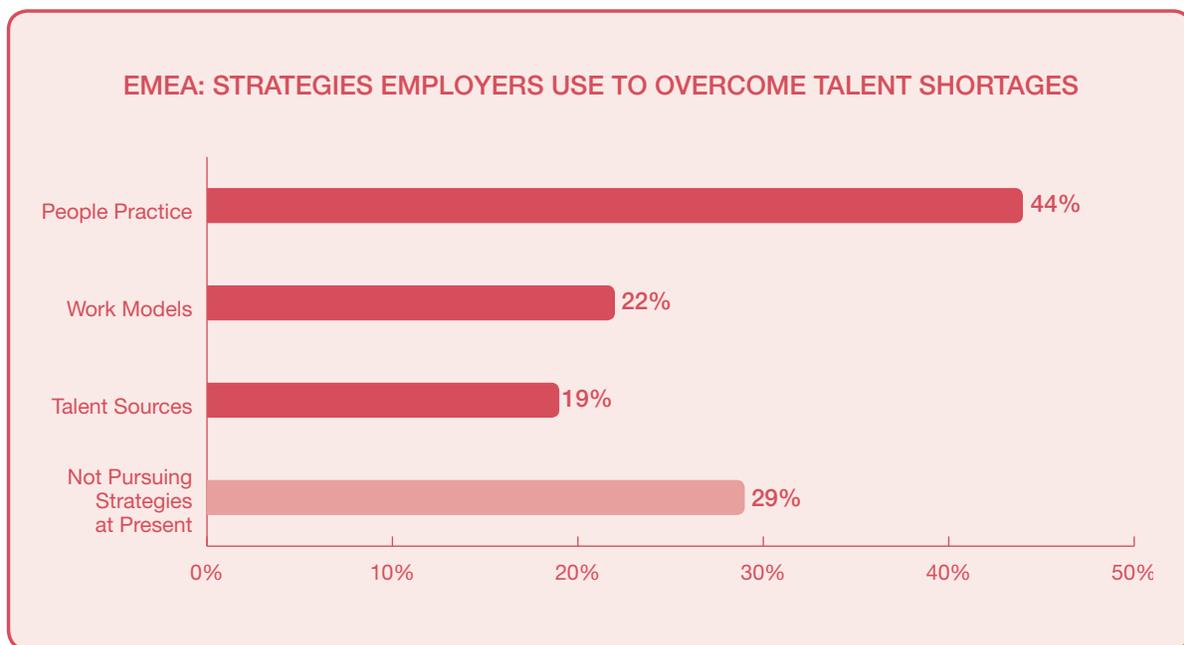


FIGURE 39

Employers in 18 of the 24 EMEA countries say talent shortages reduce their ability to serve their clients.

The most common people practice strategy is to provide additional training and development to existing staff (26%), and a further 11% of employers seek to utilize previously untried recruiting practices. Other approaches based on people practices include redefining qualifying criteria to include individuals who lack some required skills or formal qualifications but have the potential to acquire them (5%) and offering enhanced benefits packages (5%). Some employers also offer increased starting salaries (4%). (Figure 40)

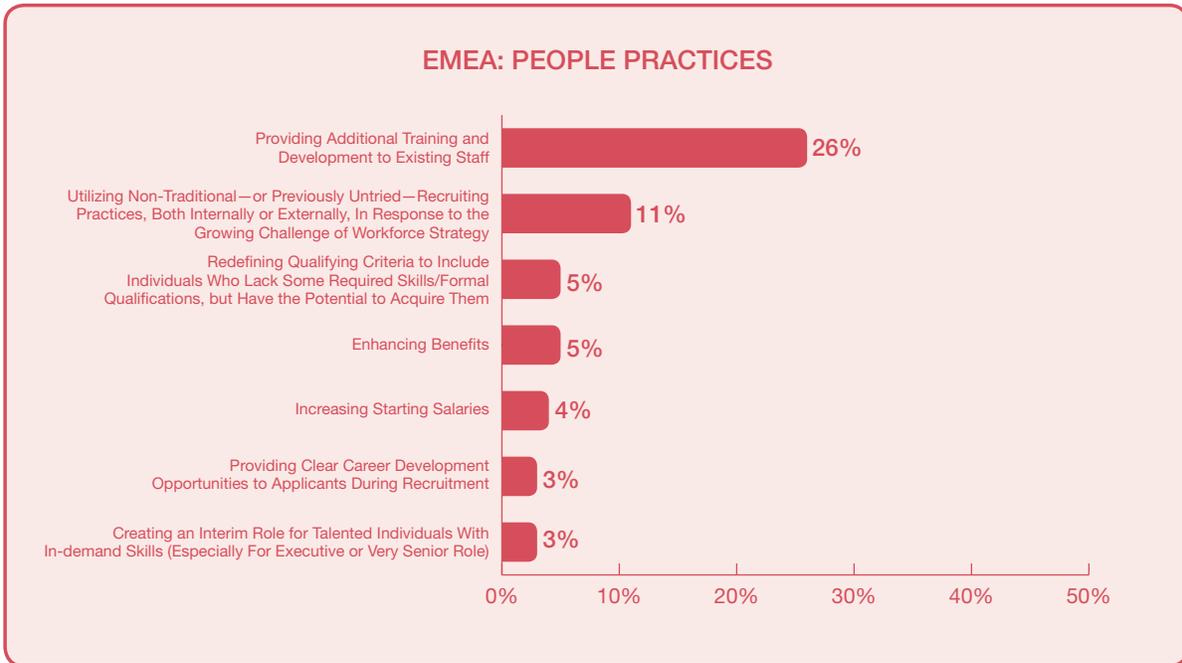


FIGURE 40

Where strategies to address skills gaps involve work models, the most frequently used approach is to increase the focus on improving the talent pipeline, for example through succession management and identifying high potentials (8%). Employers are also redesigning current work practices, for example by sharing work assignments across departments (6%), and integrating contingent workers into the process (5%). (Figure 41)

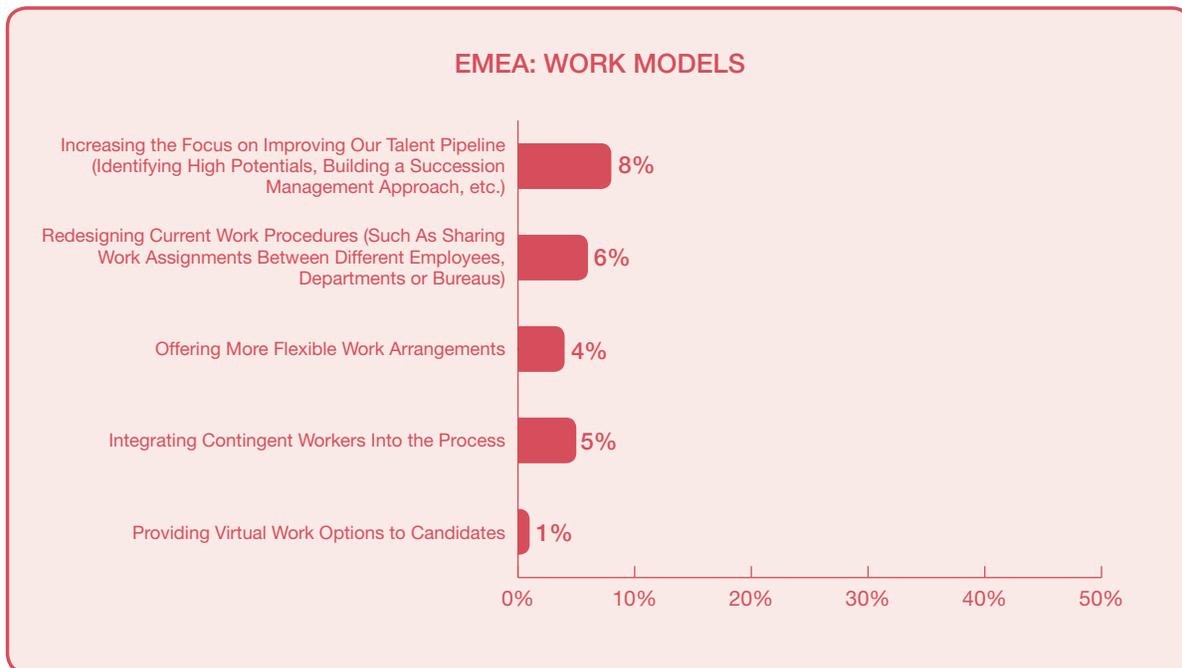


FIGURE 41

Organizations that pursue a talent sourcing strategy are most likely to look at untapped talent pools (9%). In EMEA, the most important of these is youth (4%), followed by candidates from outside the local region (3%). Other approaches which fit in this category include appointing people who don't currently have the necessary skills but do have the potential to learn and grow (7%) and partnering with educational institutions to create curriculum aligned to the talent needs of the business (5%). (Figure 42)

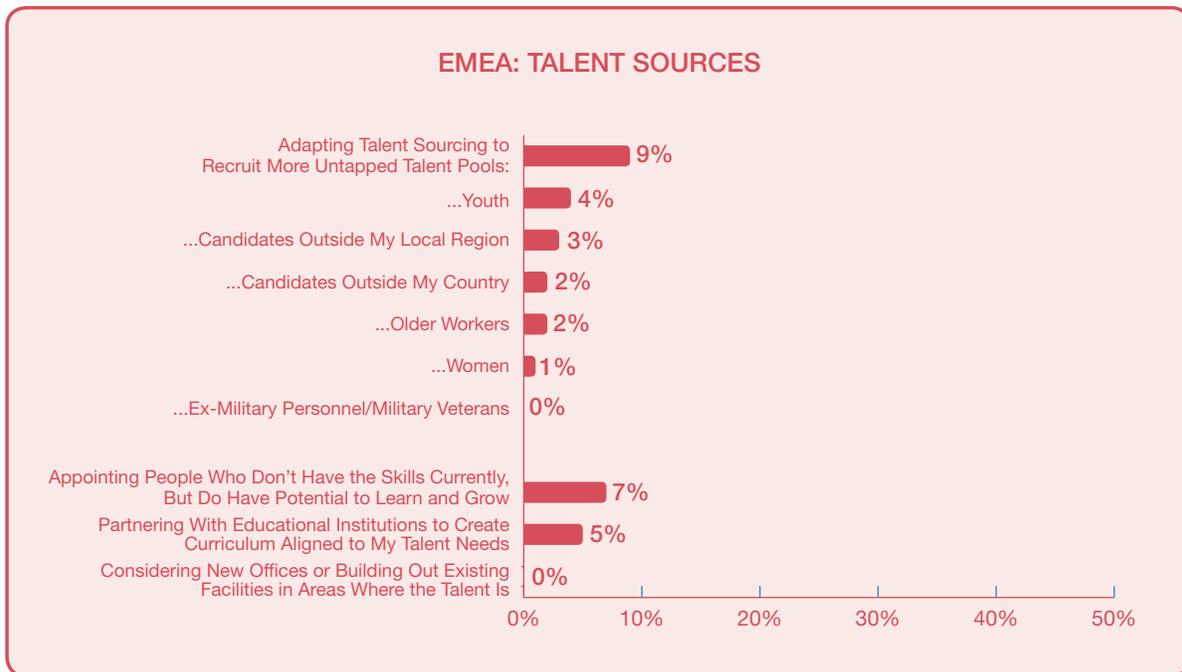


FIGURE 42

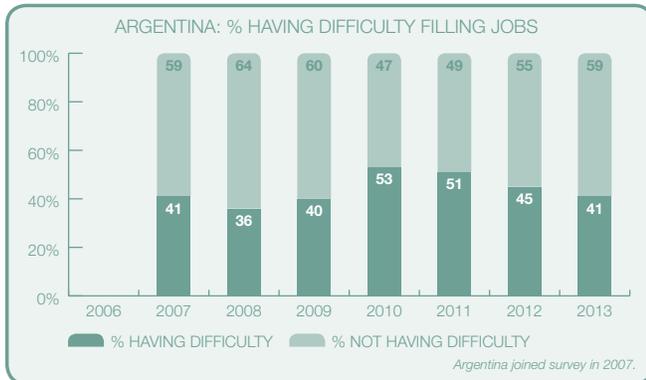


QUESTIONS EXPLORED

- *How much difficulty are you having filling jobs due to lack of available talent?*
- *What is the one job you are having most difficulty filling due to lack of available talent?*
- *What level of impact does this talent shortage have on your ability to meet client needs?*
- *How are talent shortages/skills gaps most likely to impact your organization?*
- *Why are you having difficulty filling this specific job?*
- *What strategies are you pursuing to overcome these difficulties?*

APPENDIX

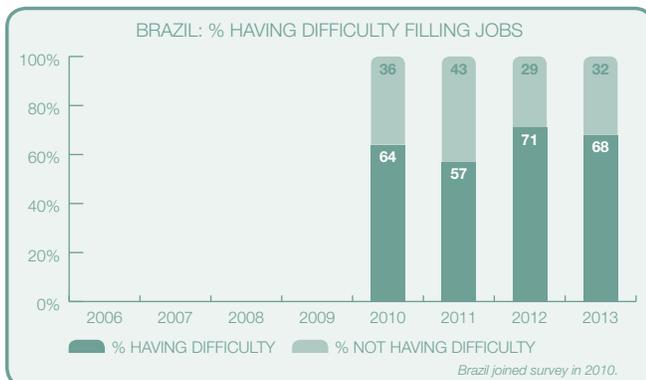
AMERICAS



ARGENTINA

TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

- 1 | Technicians
- 2 | Engineers
- 3 | Skilled Trades
- 4 | Accounting & Finance Staff
- 5 | Secretaries, PAs, Administrative Assistants & Office Support Staff
- 6 | Customer Service Representatives & Customer Support
- 7 | Laborers
- 8 | IT Staff
- 9 | Drivers
- 10 | Production Operators



BRAZIL

TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

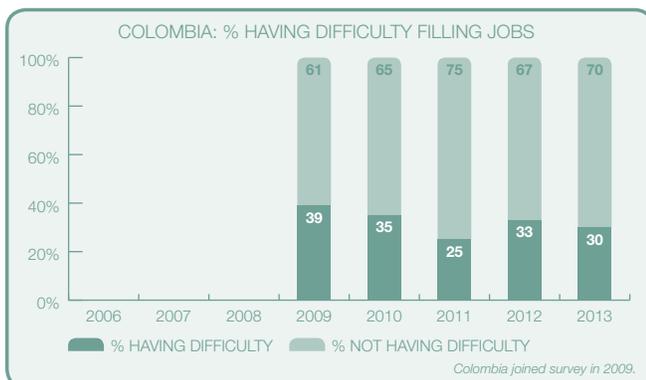
- 1 | Technicians
- 2 | Production Operators
- 3 | Accounting & Finance Staff
- 4 | Skilled Trades
- 5 | Laborers
- 6 | Engineers
- 7 | Drivers
- 8 | Secretaries, PAs, Administrative Assistants & Office Support Staff
- 9 | Sales Representatives
- 10 | Mechanics



CANADA

TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

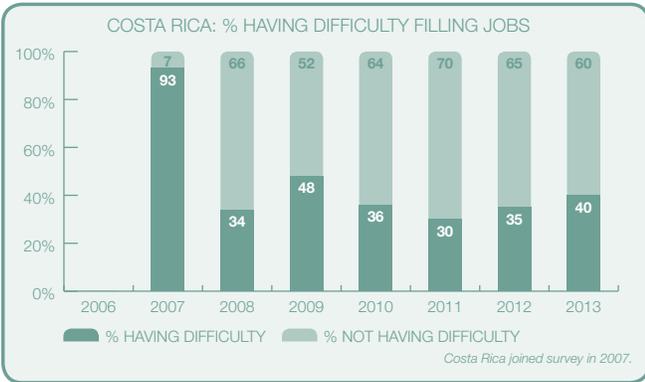
- 1 | Skilled Trades
- 2 | Engineers
- 3 | Management / Executive (Management/Corporate)
- 4 | Sales Representatives
- 5 | Technicians
- 6 | Drivers
- 7 | Accounting & Finance Staff
- 8 | IT Staff
- 9 | Teachers
- 10 | Laborers



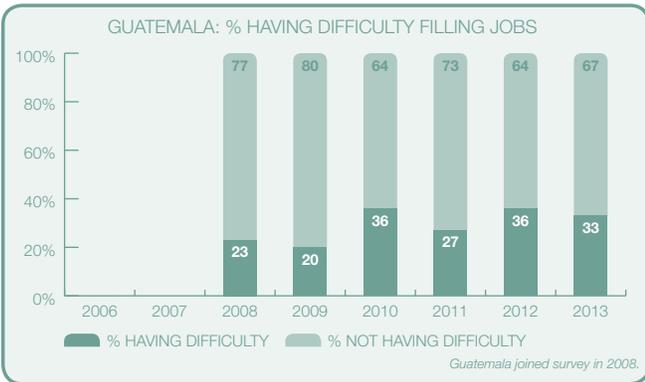
COLOMBIA

TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

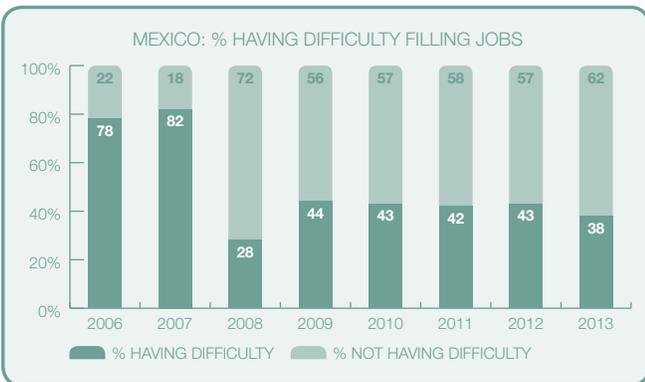
- 1 | Production Operators
- 2 | Engineers
- 3 | Secretaries, PAs, Administrative Assistants & Office Support Staff
- 4 | Accounting & Finance Staff
- 5 | Sales Representatives
- 6 | Technicians
- 7 | Customer Service Representatives & Customer Support
- 8 | Sales Managers
- 9 | Skilled Trades
- 10 | Management / Executive (Management/Corporate)



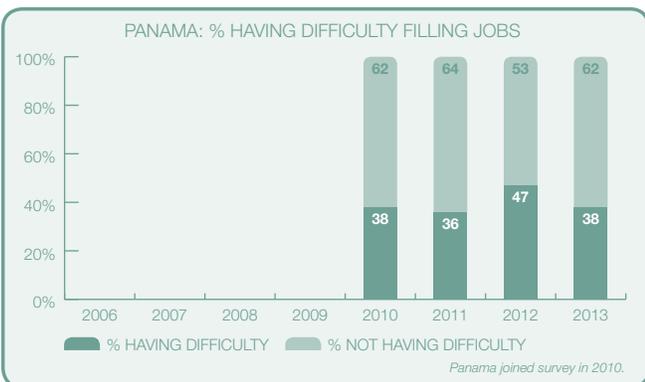
- COSTA RICA**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Technicians
 - 2 | Sales Representatives
 - 3 | Secretaries, PAs, Administrative assistants & Office Support Staff
 - 4 | Production Operators
 - 5 | Skilled Trades
 - 6 | Engineers
 - 7 | Accounting & Finance Staff
 - 8 | Mechanics
 - 9 | Machinist/Machine Operators
 - 10 | Management / Executive (Management/Corporate)



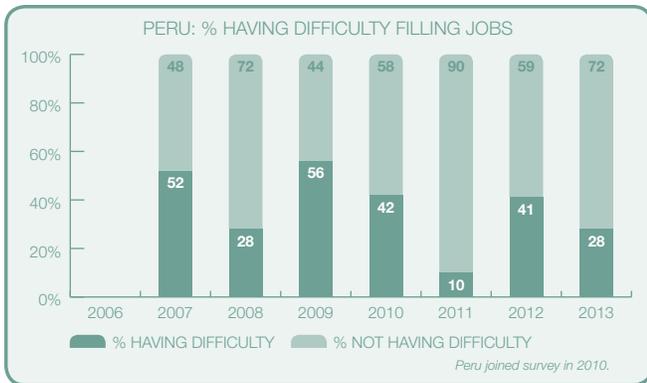
- GUATEMALA**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Sales Representatives
 - 2 | Engineers
 - 3 | Technicians
 - 4 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 5 | Customer Service Representatives & Customer Support
 - 6 | Laborers
 - 7 | Accounting & Finance Staff
 - 8 | Skilled Trades
 - 9 | Machinist/Machine Operators
 - 10 | Management / Executive (Management/Corporate)



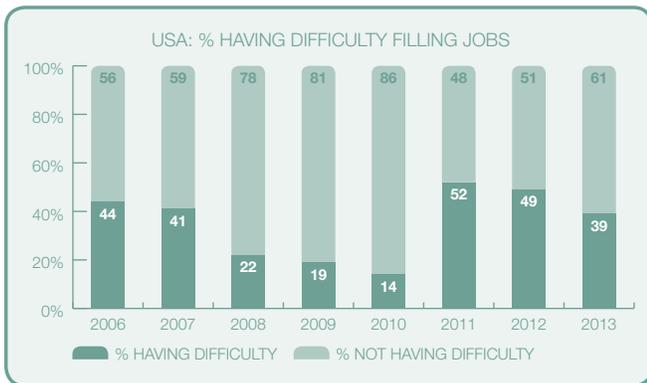
- MEXICO**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Technicians
 - 2 | Sales Representatives
 - 3 | Production Operators
 - 4 | Secretaries, PAs, Administrative assistants & Office Support Staff
 - 5 | Engineers
 - 6 | Accounting & Finance Staff
 - 7 | Laborers
 - 8 | Management / Executive (Management/Corporate)
 - 9 | Drivers
 - 10 | Receptionists



- PANAMA**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Technicians
 - 2 | Sales Representatives
 - 3 | Skilled Trades
 - 4 | Secretaries, PAs, Administrative assistants & Office Support Staff
 - 5 | Accounting & Finance Staff
 - 6 | Customer Service Representatives & Customer Support
 - 7 | Drivers
 - 8 | Engineers
 - 9 | Laborers
 - 10 | Machinist/Machine Operators

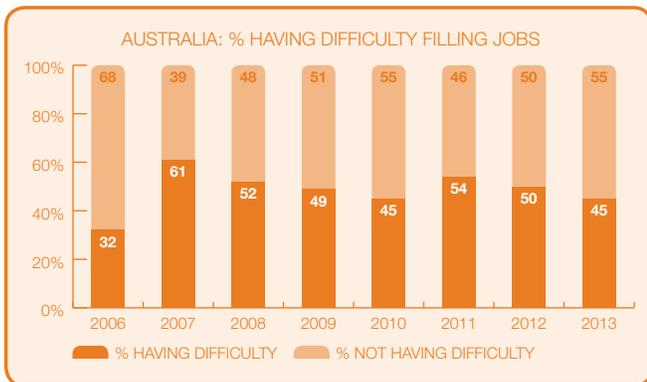


- PERU**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Technicians
 - 2 | Receptionists
 - 3 | Laborers
 - 4 | Engineers
 - 5 | Customer Service Representatives & Customer Support
 - 6 | Accounting & Finance Staff
 - 7 | Drivers
 - 8 | Teachers
 - 9 | Sales Representatives
 - 10 | Secretaries, PAs, Administrative Assistants & Office Support Staff

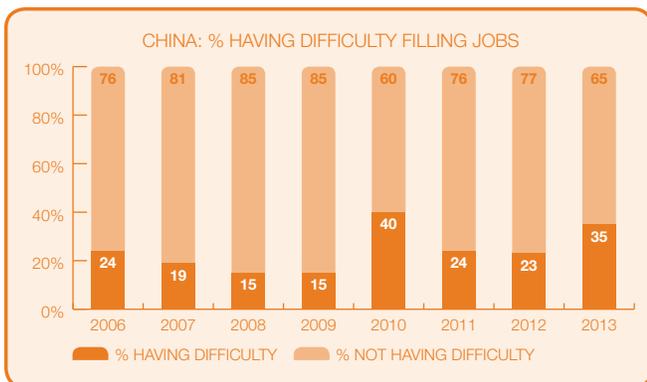


- USA**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Sales Representatives
 - 3 | Drivers
 - 4 | IT Staff
 - 5 | Accounting & Finance Staff
 - 6 | Engineers
 - 7 | Technicians
 - 8 | Management / Executive (Management/Corporate)
 - 9 | Mechanics
 - 10 | Teachers

ASIA PACIFIC



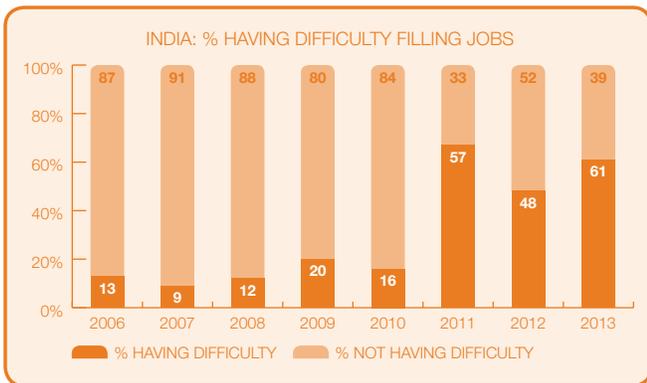
- AUSTRALIA**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Engineers
 - 3 | Sales Representatives
 - 4 | Management / Executive (Management/Corporate)
 - 5 | Accounting & Finance Staff
 - 6 | IT Staff
 - 7 | Technicians
 - 8 | Laborers
 - 9 | Machinist/Machine Operators
 - 10 | Doctors and Other Non-Nursing Health Professionals



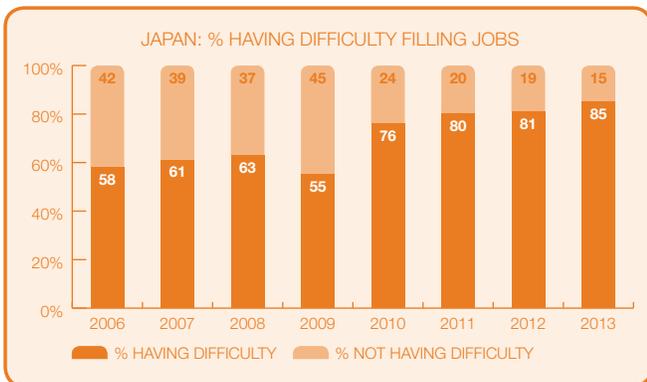
- CHINA**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Technicians
 - 2 | Sales Representatives
 - 3 | Management / Executive (Management/Corporate)
 - 4 | Sales Managers
 - 5 | Production Operators
 - 6 | Engineers
 - 7 | Laborers
 - 8 | Researchers (R&D)
 - 9 | Designers
 - 10 | Secretaries, PAs, Administrative Assistants & Office Support Staff



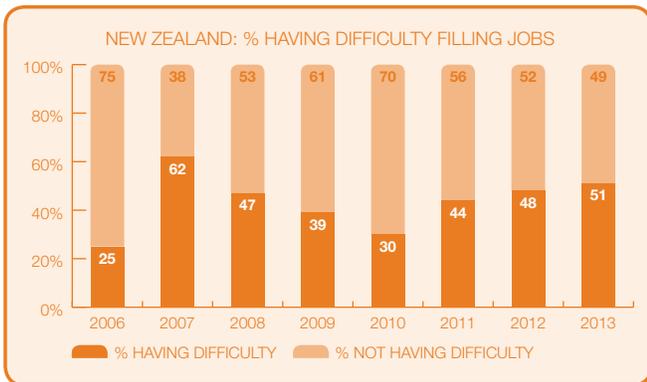
- HONG KONG
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Sales Representatives
 - 2 | Technicians
 - 3 | Engineers
 - 4 | IT Staff
 - 5 | Management / Executive (Management/Corporate)
 - 6 | Secretaries, PAs, Administrative assistants & Office support staff
 - 7 | Marketing / Public Relations / Communications staff
 - 8 | Doctors and Other Non-Nursing Health Professionals
 - 9 | Drivers
 - 10 | Cleaners & Domestic Staff



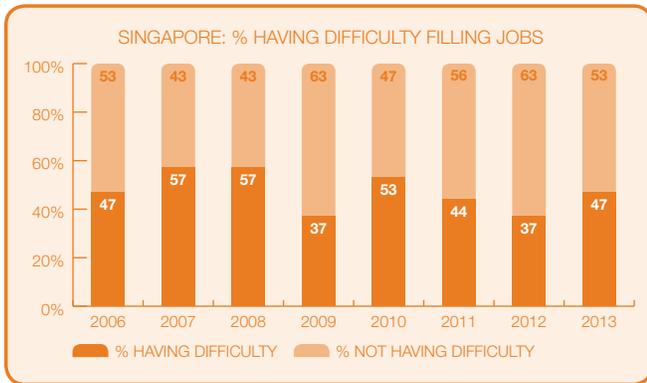
- INDIA
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Accounting & Finance Staff
 - 2 | IT Staff
 - 3 | Engineers
 - 4 | Management / Executive (Management/Corporate)
 - 5 | Marketing / Public Relations / Communications Staff
 - 6 | Teachers
 - 7 | Sales Representatives
 - 8 | Buying & Procurement staff
 - 9 | IT Managers /IT Project Managers / IT Directors
 - 10 | Researchers (R&D)



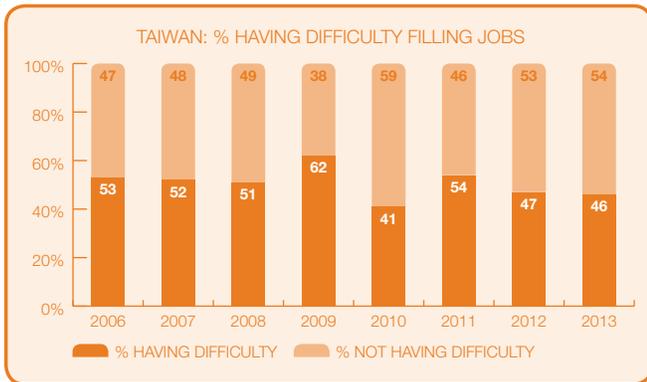
- JAPAN
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Engineers
 - 2 | Sales Representatives
 - 3 | Accounting & Finance Staff
 - 4 | IT Staff
 - 5 | Sales Managers
 - 6 | Technicians
 - 7 | IT Managers /IT Project Managers / IT Directors
 - 8 | Supervisors
 - 9 | Doctors and Other Non-Nursing Health Professionals
 - 10 | Researchers (R&D)



- NEW ZEALAND
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Engineers
 - 2 | Sales Representatives
 - 3 | IT Staff
 - 4 | Skilled Trades
 - 5 | Management / Executive (Management/Corporate)
 - 6 | Technicians
 - 7 | Accounting & Finance Staff
 - 8 | Customer Service Representatives & Customer Support
 - 9 | Machinist/Machine Operators
 - 10 | Supervisors

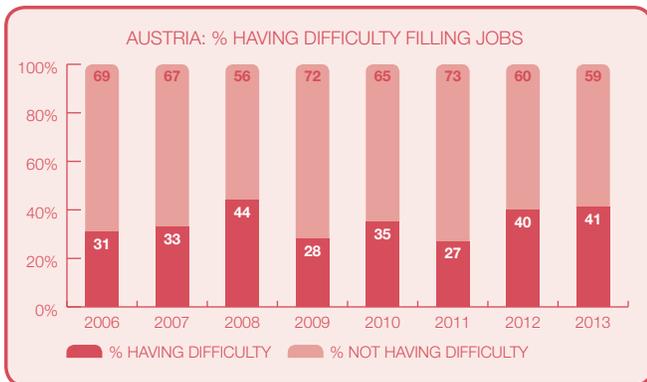


- SINGAPORE
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 2 | Supervisors
 - 3 | Laborers
 - 4 | Drivers
 - 5 | Sales Representatives
 - 6 | Engineers
 - 7 | IT Staff
 - 8 | Skilled Trades
 - 9 | Accounting & Finance Staff
 - 10 | Teachers

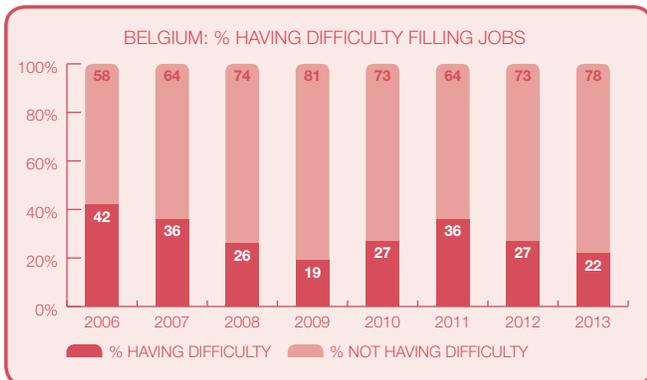


- TAIWAN
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Sales Representatives
 - 2 | Technicians
 - 3 | Engineers
 - 4 | Researchers (R&D)
 - 5 | Management / Executive (Management/Corporate)
 - 6 | Production Operators
 - 7 | IT Staff
 - 8 | Mechanics
 - 9 | Sales Managers
 - 10 | Accounting & Finance Staff

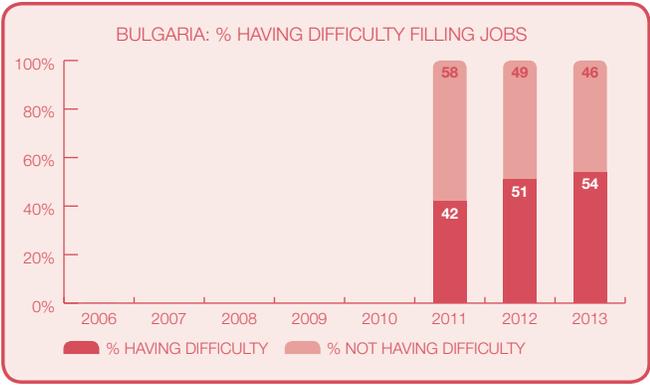
EMEA



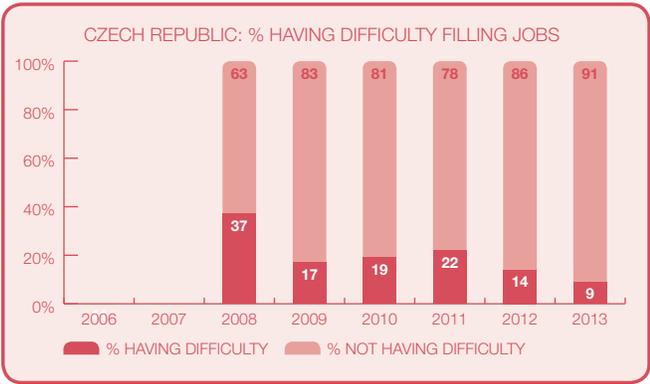
- AUSTRIA
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Skilled Trades
 - 2 | Sales Representatives
 - 3 | Management / Executive (Management/Corporate)
 - 4 | Technicians
 - 5 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 6 | Doctors and Other Non-Nursing Health Professionals
 - 7 | Engineers
 - 8 | Restaurants & Hotel Staff
 - 9 | Accounting & Finance Staff
 - 10 | IT Staff



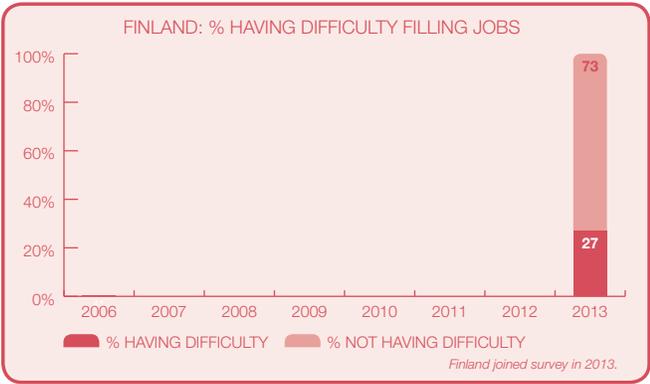
- BELGIUM
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Skilled Trades
 - 2 | Technicians
 - 3 | Laborers
 - 4 | Drivers
 - 5 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 6 | Mechanics
 - 7 | Supervisors
 - 8 | Accounting & Finance Staff
 - 9 | Sales Representatives
 - 10 | Nurses



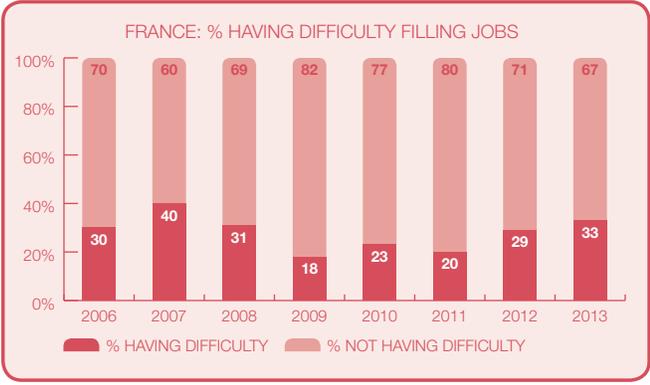
- BULGARIA**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Engineers
 - 2 | Management / Executive (Management/Corporate)
 - 3 | Skilled Trades
 - 4 | Sales Managers
 - 5 | Sales Representatives
 - 6 | IT Staff
 - 7 | Restaurants & Hotel Staff
 - 8 | Drivers
 - 9 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 10 | Production Operators



- CZECH REPUBLIC**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Engineers
 - 3 | Management / Executive (Management/Corporate)
 - 4 | Doctors and Other Non-Nursing Health Professionals
 - 5 | Buying & Procurement staff
 - 6 | Accounting & Finance Staff
 - 7 | Marketing / Public Relations / Communications staff
 - 8 | Sales Representatives
 - 9 | Laborers
 - 10 | Sales Managers



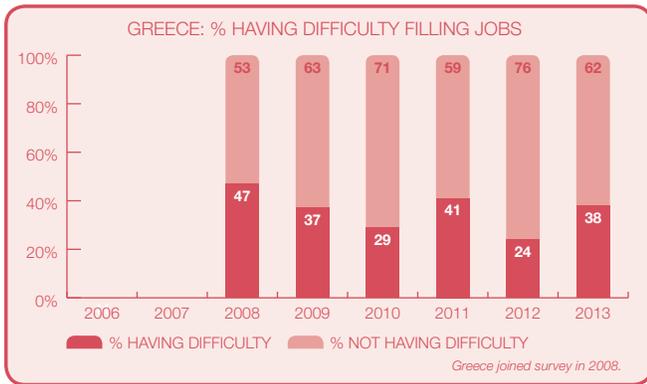
- FINLAND**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Drivers
 - 3 | Sales Representatives
 - 4 | Accounting & Finance Staff
 - 5 | Mechanics
 - 6 | Chefs / Cooks
 - 7 | IT Staff
 - 8 | Sales Managers
 - 9 | Engineers
 - 10 | Doctors and Other Non-Nursing Health Professionals



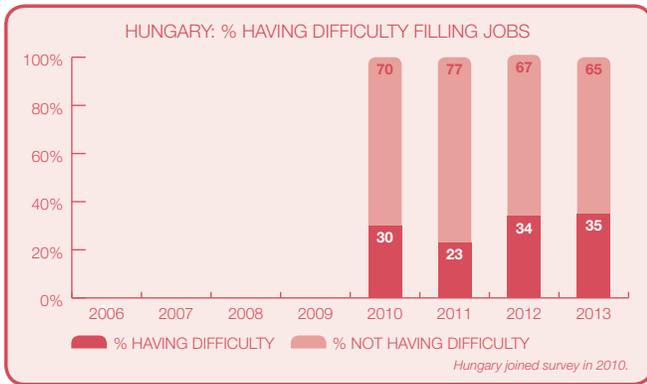
- FRANCE**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Drivers
 - 3 | Technicians
 - 4 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 5 | Sales Representatives
 - 6 | Engineers
 - 7 | Accounting & Finance Staff
 - 8 | Laborers
 - 9 | Restaurants & Hotel Staff
 - 10 | Supervisors



- GERMANY**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Engineers
 - 3 | Accounting & Finance Staff
 - 4 | Sales Representatives
 - 5 | Customer Service Representatives & Customer Support
 - 6 | Technicians
 - 7 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 8 | Doctors and Other Non-Nursing Health Professionals
 - 9 | IT Staff
 - 10 | Drivers



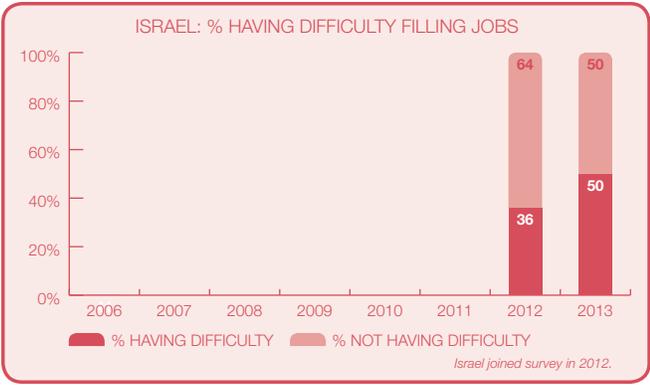
- GREECE**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Sales Representatives
 - 2 | Management / Executive (Management/Corporate)
 - 3 | Technicians
 - 4 | Customer Service Representatives & Customer Support
 - 5 | Skilled Trades
 - 6 | Accounting & Finance Staff
 - 7 | IT Staff
 - 8 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 9 | Sales Managers
 - 10 | Engineers



- HUNGARY**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Engineers
 - 3 | Sales Representatives
 - 4 | Drivers
 - 5 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 6 | Accounting & Finance Staff
 - 7 | Mechanics
 - 8 | Restaurants & Hotel Staff
 - 9 | Doctors and Other Non-Nursing Health Professionals
 - 10 | Machinist/Machine Operators



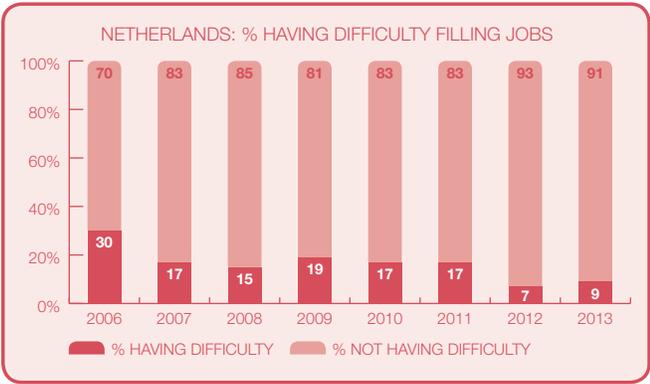
- IRELAND**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Engineers
 - 3 | Management / Executive (Management/Corporate)
 - 4 | Chefs / Cooks
 - 5 | Laborers
 - 6 | Technicians
 - 7 | Drivers
 - 8 | Nurses
 - 9 | Sales Managers
 - 10 | Doctors and Other Non-Nursing Health Professionals



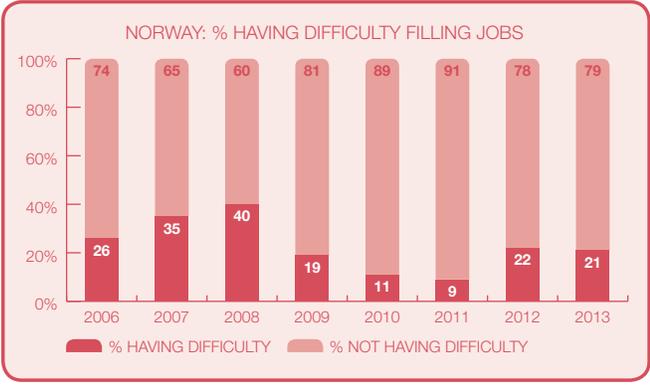
- ISRAEL**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Engineers
 - 3 | Management / Executive (Management/Corporate)
 - 4 | Nurses
 - 5 | Machinist/Machine Operators
 - 6 | Technicians
 - 7 | Drivers
 - 8 | IT Staff
 - 9 | Sales Representatives
 - 10 | Laborers



- ITALY**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Skilled Trades
 - 2 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 3 | IT Staff
 - 4 | Technicians
 - 5 | Accounting & Finance Staff
 - 6 | Sales Managers
 - 7 | Engineers
 - 8 | Drivers
 - 9 | Machinist/Machine Operators
 - 10 | Buying & Procurement Staff



- NETHERLANDS**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Sales Managers
 - 2 | Chefs / Cooks
 - 3 | Technicians
 - 4 | Skilled Trades
 - 5 | Sales Representatives
 - 6 | Legal Staff (Solicitors, Lawyers, Legal Secretaries)
 - 7 | Mechanics
 - 8 | Management / Executive (Management/Corporate)
 - 9 | Accounting & Finance Staff
 - 10 | Drivers

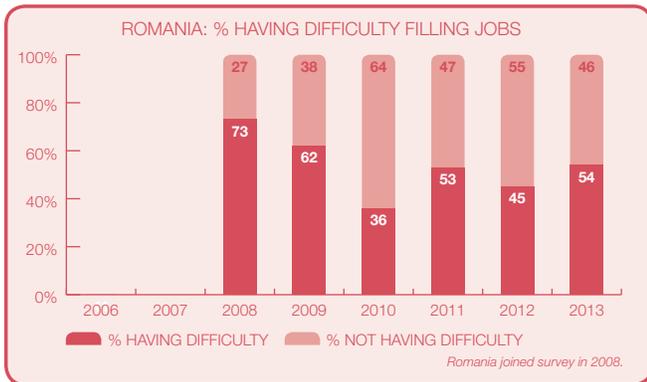


- NORWAY**
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING
- 1 | Sales Representatives
 - 2 | Skilled Trades
 - 3 | Engineers
 - 4 | Teachers
 - 5 | Drivers
 - 6 | Chefs / Cooks
 - 7 | Receptionists
 - 8 | Management / Executive (Management/Corporate)
 - 9 | Accounting & Finance Staff
 - 10 | IT Staff



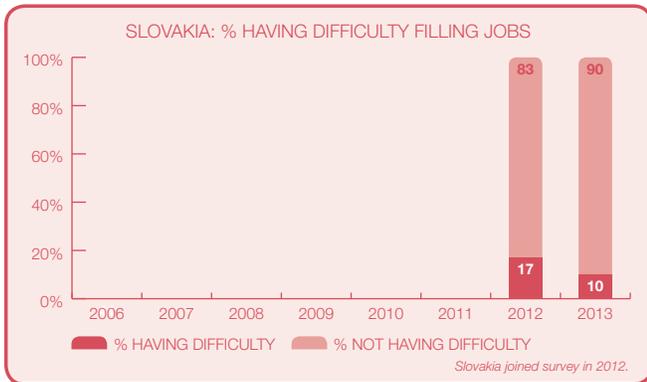
**POLAND
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**

- 1 | Skilled Trades
- 2 | Engineers
- 3 | Technicians
- 4 | Sales Representatives
- 5 | Drivers
- 6 | Management / Executive (Management/Corporate)
- 7 | Chefs / Cooks
- 8 | IT Staff
- 9 | Laborers
- 10 | Designers



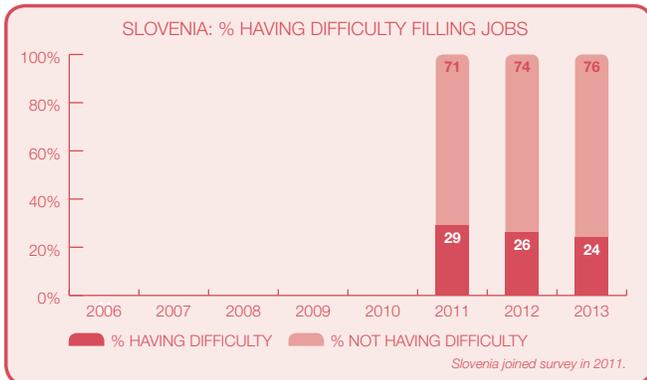
**ROMANIA
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**

- 1 | Skilled Trades
- 2 | Engineers
- 3 | Laborers
- 4 | Management / Executive (Management/Corporate)
- 5 | Accounting & Finance Staff
- 6 | Sales Representatives
- 7 | Technicians
- 8 | IT Staff
- 9 | Machinist/Machine Operators
- 10 | Chefs / Cooks



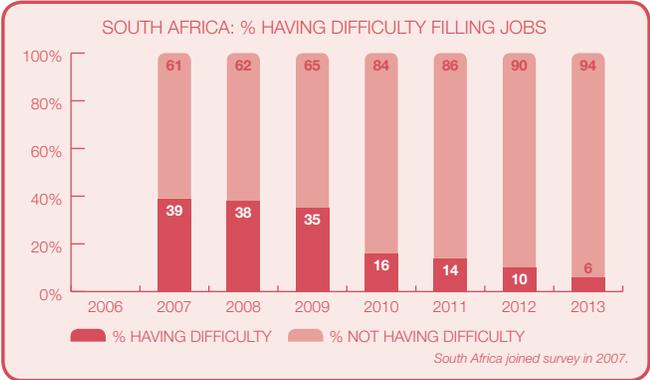
**SLOVAKIA
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**

- 1 | Skilled Trades
- 2 | Engineers
- 3 | Accounting & Finance Staff
- 4 | Chefs / Cooks
- 5 | Teachers
- 6 | Technicians
- 7 | Drivers
- 8 | Sales Managers
- 9 | Quality Controllers
- 10 | Restaurants & Hotel staff

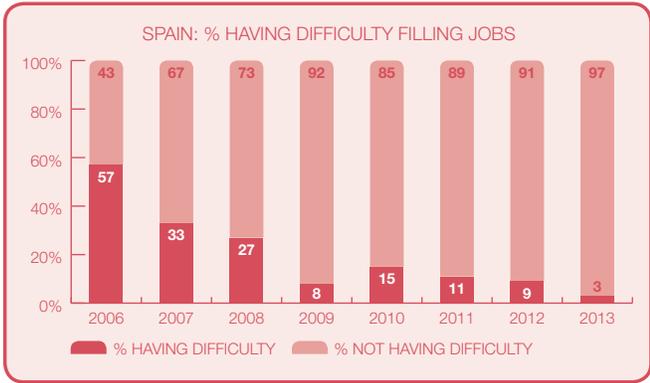


**SLOVENIA
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**

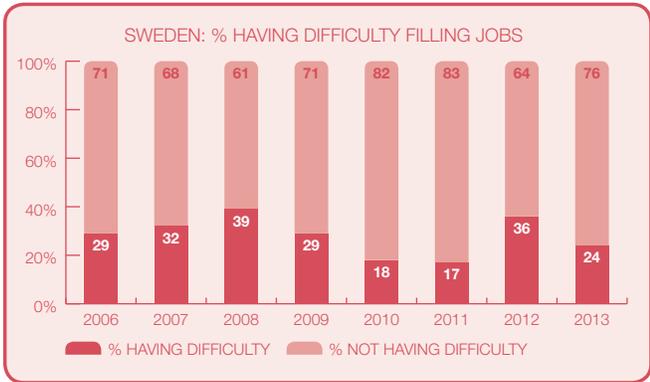
- 1 | Engineers
- 2 | Skilled Trades
- 3 | Laborers
- 4 | Chefs / Cooks
- 5 | Drivers
- 6 | Sales Managers
- 7 | Doctors and Other Non-Nursing Health Professionals
- 8 | Restaurants & Hotel Staff
- 9 | Marketing / Public Relations / Communications Staff
- 10 | Management / Executive (Management/Corporate)



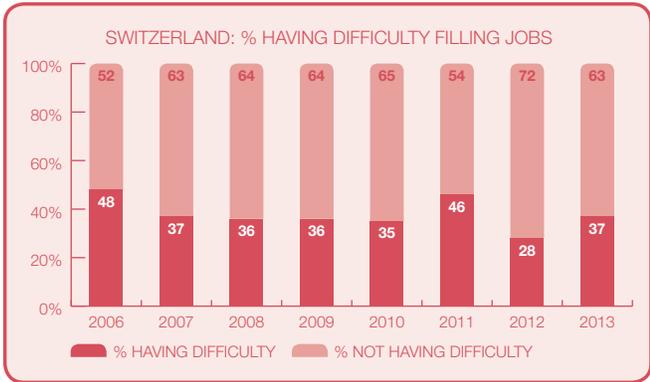
- SOUTH AFRICA
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Engineers
 - 2 | Management / Executive (Management/Corporate)
 - 3 | Teachers
 - 4 | Legal Staff (Solicitors, Lawyers, Legal Secretaries)
 - 5 | Skilled Trades
 - 6 | Accounting & Finance Staff
 - 7 | Restaurants & Hotel staff
 - 8 | Technicians
 - 9 | Customer Service Representatives & Customer Support
 - 10 | IT Staff



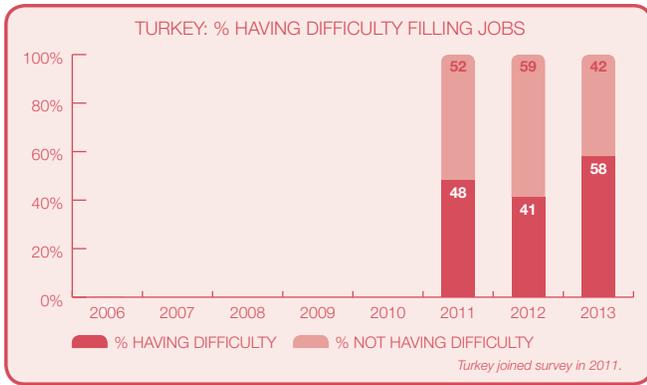
- SPAIN
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Sales Representatives
 - 2 | Skilled Trades
 - 3 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 4 | Technicians
 - 5 | Legal Staff (Solicitors, Lawyers, Legal Secretaries)
 - 6 | Engineers
 - 7 | Accounting & Finance Staff
 - 8 | IT Staff
 - 9 | Chefs / Cooks
 - 10 | Nurses



- SWEDEN
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Engineers
 - 2 | Sales Representatives
 - 3 | Skilled Trades
 - 4 | Management / Executive (Management/Corporate)
 - 5 | Chefs / Cooks
 - 6 | Technicians
 - 7 | Drivers
 - 8 | Supervisors
 - 9 | Accounting & Finance Staff
 - 10 | Machinist/Machine Operators

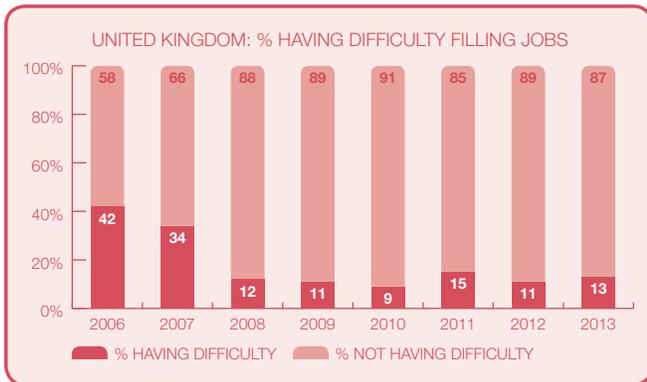


- SWITZERLAND
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING**
- 1 | Skilled Trades
 - 2 | Management / Executive (Management/Corporate)
 - 3 | Secretaries, PAs, Administrative Assistants & Office Support Staff
 - 4 | Accounting & Finance Staff
 - 5 | IT Staff
 - 6 | Chefs / Cooks
 - 7 | Engineers
 - 8 | Restaurants & Hotel Staff
 - 9 | Drivers
 - 10 | Doctors and Other Non-Nursing Health Professionals



TURKEY
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

- 1 | Engineers
- 2 | Laborers
- 3 | Sales Representatives
- 4 | Accounting & Finance Staff
- 5 | Marketing / Public Relations / Communications staff
- 6 | Production Operators
- 7 | Mechanics
- 8 | Management / Executive (Management/Corporate)
- 9 | Drivers
- 10 | Technicians



UNITED KINGDOM
TOP 10 JOBS EMPLOYERS ARE HAVING DIFFICULTY FILLING

- 1 | Skilled Trades
- 2 | Engineers
- 3 | Drivers
- 4 | Secretaries, PAs, Administrative Assistants & Office Support Staff
- 5 | Chefs / Cooks
- 6 | Management / Executive (Management/Corporate)
- 7 | IT Staff
- 8 | Technicians
- 9 | Customer Service Representatives & Customer Support
- 10 | Sales Representatives

MANPOWERGROUP

100 MANPOWER PLACE

MILWAUKEE, WI 53212

USA

WWW.MANPOWERGROUP.COM

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