

Dear Subscribers,

«HR-UNION» Associations Union offers you an overview of the labor market of Uzbekistan in 2012, based on the results of analysis of the HRC and MyJob.uz databases.

KEY EVENTS IN THE LABOUR MARKET OF UZBEKISTAN IN 2012:

-The Cabinet of Ministers has adopted the Resolution dated 18 October 2012 # 297 "On approval of the Regulation of a part-time work and overlapping professions and positions held" which forbids one person from having two senior managerial positions in the government and business spheres at the same time, including a part-time occupation, except for the special cases approved by the law.

- During the first 9 months of 2012, 773,000 new jobs have been created in Uzbekistan, with more than 486 thous. or 62,9% - in rural areas (Source: Ministry of Labor and Social Protection of Uzbekistan).

- In 2012, there was a 2-fold increase in salaries of employees of budgetary institutions, in pensions and social benefits, as well as in scholarships. Starting from December 1, 2012, the minimum wage level is 79,590 soums.

- In 2012, the salary of science researchers has increased more than 2.5 times. Thus, the salary a Professor and Director of the Institute has increased from 416,030 to 1,118,449 soums, of a research assistant (PhD) - from 293,266 to 788,412 soums, and of a trainee researcher - from 231,492 to 622,340 soums.

- The Legislative Chamber of the Oliy Majlis and the Cabinet of Ministers have approved a Program of creating new jobs and increasing the employment rate in 2013.

REVIEW OF THE LABOR MARKET IN 2012

The labor market analysis has been performed based on a research of MyJob.uz and HRC databases, and analysis of more than 20,000 CVs.

Applicant Profile.

It should be noted that most of the applicants of MyJob.uz were males – 63% of all job seekers, and number of the females was 1.7 times less (37%).

Age distribution: the highest number of all applicants (60%) were aged 22-30. Such a high percentage of this age group can be explained by a number of new graduates in search for work, as well as young professionals who have not found their ‘ideal’ company yet, and are in search of their ‘dream job’.

In the HRC database, the largest number of applicants were also males - 58% (and 42% females).

As for the age group, it should be noted that the HRC database has a prevailing number of older aged applicants: 31-35 years old. The supportive factor here is the fact that HRC database is presented mainly by the highly experienced professionals who apply for the top positions, while the largest number of MyJob.uz applicants is aged between 22-25.

Thus, the analysis of the two databases showed that applicants of MyJob.uz database which require on-line registration are mostly young experienced specialists, while HRC base represented by more experienced job seekers without any on-line registration and prefer to be presented to the employer by HRC.

Table # 1: Applicant’s profile by gender and age, 2012

MyJob.uz				HRC			
Age categories	Women	Men	Total	Age categories	Women	Men	Total
18-21 years	5%	8%	13%	18-21 years	0%	0%	0%
22-25 years	13%	19%	31%	22-25 years	5%	6%	11%
26-30 years	10%	19%	29%	26-30 years	11%	14%	25%
31-35 years	5%	9%	14%	31-35 years	14%	16%	30%
36-40 years	2%	4%	6%	36-40 years	7%	11%	18%
41-45 years	1%	2%	3%	41-45 years	2%	5%	7%
46-50 years	1%	1%	2%	46-50 years	2%	4%	6%
51 years and over	1%	1%	1%	51 years and over	1%	2%	3%
Total	37%	63%	100%	Total	42%	58%	100%

Salary expectations of applicants:

As for the salary expectations of the candidates, the majority of applicants were not ready to disclose their expectations on salary level and opted to leave this topic for further discussions upon the interview results. However, among those candidates who have disclosed their salary expectations, the highest percentage among MyJob.uz applicants (36%) would like to get "NET"

751,000 – 1,000,000 sum. Among the candidates of HRC which specializes mainly in executive search, the prevailing salary expectations were in the range of more than 2 million sum – this was a preference of 25% of all applicants in HRC database.

Table # 2: Salary expectations of applicants

MyJob.uz				HRC			
Salary expectations	Women	Men	Total	Salary expectations	Women	Men	Total
251-500 thous.	1%	2%	3%	251-500 thous.	0%	0%	0%
501-750 thous.	6%	5%	11%	501-750 thous.	2%	1%	3%
751-1000 thous.	17%	19%	36%	751-1000 thous.	1%	4%	5%
1001-1250 thous.	6%	11%	17%	1001-1250 thous.	4%	3%	7%
1251-1500 thous.	5%	7%	12%	1251-1500 thous.	3%	3%	6%
1501-1750 thous.	3%	6%	9%	1501-1750 thous.	5%	9%	14%
1751-2000 thous.	1%	4%	5%	1751-2000 thous.	8%	12%	20%
2001 -2250 thous.	1%	3%	4%	2001 -2250 thous.	15%	10%	25%
> 2251 thous.	1%	2%	3%	> 2251 thous.	8%	12%	20%
Total	41%	59%	100%	Total	46%	54%	100%

Offers of employers:

Below is a snapshot of the changes in wages in 2011-2012, for selected positions.

In order to properly reflect the wages level offered by different types of employers, we have presented our analysis in two categories: the salary offered by the local company, and salary for the same position offered by the company with the participation of foreign investments (Foreign company, JV, Rep.Office).

The analysis of wages in the local companies shows a general increase of salaries by 4%-23%, depending on the position.

As for the offers from the foreign companies, the level of wages is quite high compared to the local companies' offers for the same positions. Changes in 2012 were from 2% to 17%, depending on the industry and the position.

A more detailed breakdown of the dynamics of wages in 2011-2012 is presented below.

Table # 3: Changes in wages on selected positions (Net salary) - Local Companies, thous.soum

#	Position	2011			2012			Change, %		
		Minimum	Medium	Maximum	Minimum	Medium	Maximum	Minimum	Medium	Maximum
	Technical (Production) staff									
1	Technical director	1000	1250	1500	1200	1350	1500	20%	8%	0%
2	Chief engineer	900	1100	1300	1000	1200	1400	11%	9%	8%
3	Power engineer	700	800	900	800	900	1000	14%	13%	11%
4	Technical worker	400	500	600	500	600	700	25%	20%	17%
	Finance department									
1	Financial director	1000	1300	1600	1200	1600	2000	20%	23%	25%
2	Chief accountant	800	1050	1300	1000	1250	1500	25%	19%	15%
3	Accountant	500	700	900	600	750	900	20%	7%	0%
4	Cashier	350	525	700	400	600	800	14%	14%	14%
	Legal									
1	Legal manager	800	1150	1500	900	1200	1500	13%	4%	0%
2	Lawyer	500	850	1200	600	900	1200	20%	6%	0%
	Sales									
1	Sales manager	1000	1100	1200	1200	1250	1300	20%	14%	8%
2	Trade agent	350	562,5	775	450	625	800	29%	11%	3%
3	Merchandiser	350	575	800	400	600	800	14%	4%	0%
	Marketing									
1	Marketing manager	700	800	900	800	900	1000	14%	13%	11%
2	Marketing specialist	500	550	600	600	650	700	20%	18%	17%
3	Brand-manager	400	500	600	500	550	600	25%	10%	0%
	HR									
1	HR Manager	700	800	900	700	850	1000	0%	6%	11%
2	HR specialist	600	800	1000	600	800	1000	0%	0%	0%
3	Training and Development Supervisor	500	650	800	500	650	800	0%	0%	0%
	IT sector									
1	Project Manager	900	1050	1200	1000	1100	1200	11%	5%	0%
2	IT specialist	600	700	800	600	750	900	0%	7%	13%
3	IT administrator	600	700	800	600	750	900	0%	7%	13%

Analysis of wages is based on the expectations of the job seekers and employers of the private sector only, and does not reflect the compensation policies of any particular companies.

Table #4: Changes in wages on selected positions (Net salary) - Foreign Companies, thous.soum

#	Position	2011			2012			Change, %		
		Minimum	Medium	Maximum	Minimum	Medium	Maximum	Minimum	Medium	Maximum
	Technical (Production) staff									
1	Technical director	2000	3000	4000	2000	3000	4000	0%	0%	0%
2	Chief engineer	1500	2100	2700	1600	2300	3000	7%	10%	11%
3	Power engineer	1500	2000	2500	1600	2300	3000	7%	15%	20%
4	Technical worker	1000	1000	1000	1100	1150	1200	10%	15%	20%
	Finance department									
1	Financial director	3000	4000	5000	3000	4500	6000	0%	13%	20%
2	Chief accountant	2800	3300	3800	3000	3750	4500	7%	14%	18%
3	Accountant	1600	1950	2300	1800	2150	2500	13%	10%	9%
4	Cashier	800	850	900	800	850	900	0%	0%	0%
	Legal									
1	Legal manager	2500	3150	3800	2700	3600	4500	8%	14%	18%
2	Lawyer	1500	2350	3200	1500	2500	3500	0%	6%	9%
	Sales									
1	Sales manager	2500	2850	3200	2500	3000	3500	0%	5%	9%
2	Trade agent	1200	1350	1500	1200	1350	1500	0%	0%	0%
3	Merchandiser	1200	1200	1200	1200	1200	1200	0%	0%	0%
	Marketing									
1	Marketing manager	2100	2550	3000	2200	2600	3000	5%	2%	0%
2	Marketing specialist	1500	1500	1500	1500	1750	2000	0%	17%	33%
3	Brand-manager	1200	1400	1600	1200	1600	2000	0%	14%	25%
	HR									
1	HR Manager	1800	1900	2000	2000	2250	2500	11%	18%	25%
2	HR specialist	1000	1250	1500	1000	1250	1500	0%	0%	0%
3	Training and Development Supervisor	900	950	1000	900	950	1000	0%	0%	0%
	IT sector									
1	Project Manager	2000	2500	3000	2000	2750	3500	0%	10%	17%
2	IT specialist	1300	1950	2600	1300	2050	2800	0%	5%	8%
3	IT administrator	1800	2050	2300	1800	2150	2500	0%	5%	9%

Analysis of wages is based on the expectations of the job seekers and employers of the private sector only, and does not reflect the compensation policies of any particular companies.

Knowledge of a foreign language and a level of education:

Most of the employers require knowledge of English or other foreign languages. Our survey has revealed that a high percentage of Myjob.uz applicants had poor English skills (can read, but don't know the words), or didn't know the language at all - 30% of all applicants. The candidates who are fluent in English comprised 38%, or 6331 applicants, and a good knowledge of the language (can be interviewed in English) was reported by 12% of applicants.

Most applicants of HRC, conversely, had fluent English skills - 42% of applicants. This is due to the fact that most vacancies of HRC comprise the vacancies of foreign companies and representative offices, where the English language proficiency is a necessary requirement.

Table # 5: English language skills of the applicants

MyJob.uz		HRC	
English skills level	% of applicants	English skills level	% of applicants
Beginning	6%	Beginning	5%
Don't speak/Low level	30%	Don't speak/Low level	3%
Fluent	38%	Fluent	42%
Intermediate	14%	Intermediate	15%
Good	12%	Good	35%
Total	100%	Total	100%

As for the level of education - the largest number of MyJob.uz applicants were the specialists with higher education / bachelor degree - 87% of all applicants, followed by the specialists of other educational decrees - "the other" - 7% (mostly specialists with secondary education).

HRC database had a prevailing number of the specialists with the higher education - 48%, followed by the applicants with Master's degree - 44%. There were also some applicants with a degree in "PhD" - 7% of applicants, Doctor of Science - 1% of applicants.

Table # 6: Educational level of applicants

MyJob.uz				HRC			
Education	Women	Men	Total	Education	Women	Men	Total
Bachelor/ Higher education	33%	55%	87%	Bachelor/ Higher education	23%	25%	48%
Doctor of Science	0%	0%	0%	Doctor of Science	0%	1%	1%
Other	2%	4%	7%	Other	0%	0%	0%
PhD	0%	0%	0%	PhD	1%	6%	7%
Master	2%	4%	6%	Master	19%	25%	44%
Total	37%	63%	100%	Total	43%	57%	100%

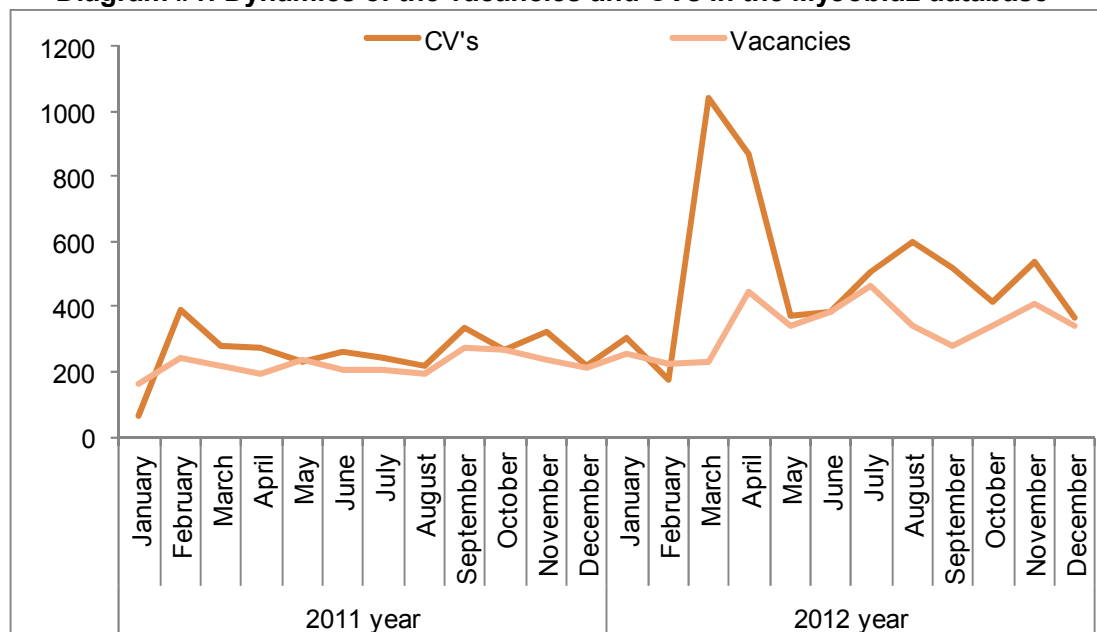
Labor market activity in 2012:

2012 saw a high growth in the applicants searching for a new job, with the highest number of resumes having been received in March 2012, when the number of new resumes in the database totaled 1042. This high figure was triggered by a «Job Fair» held in March in 2012 - the annual event organized by the HR Union. During this period, all potential participants of this event have posted their resumes on the databases, which has significantly increased the number of applicants registered online.

When compared by the number of new vacancies, 2012 was leading as well. Thus, the largest number of vacancies announced in 2012, noted in July, was 2.2 times more than during the same period of previous year. The relative decline of vacancies in December and January is the result of a seasonable volatility in the market, when the business activity of the labor market slows down due to the winter holidays, as well as the fiscal year end.

In average, the number of vacancies received in 2012 amounted to 338 per month, which is 154% more than in 2011 (average number of vacancies per month was 220).

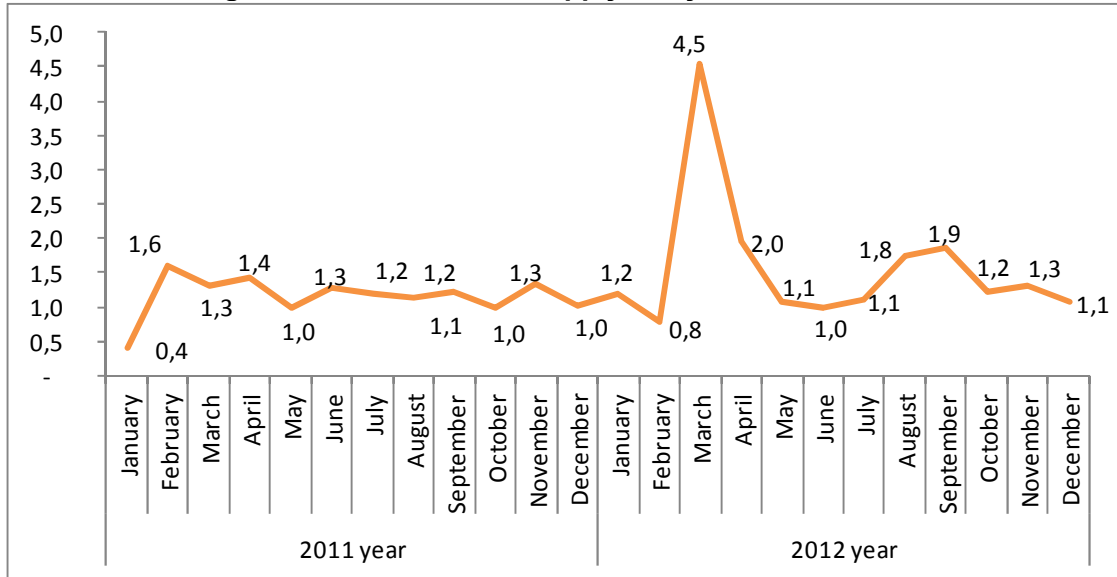
Diagram #1: Dynamics of the vacancies and CVs in the MyJob.uz database



The dynamics of supply and demand in 2012:

The maximum supply to demand ratio was recorded in March 2012, with 4.5 CVs per one vacancy. This can be attributed to the “Job fair” event and the large number of resumes having been registered in the database in those days. During other periods, one vacancy would attract 2.1 CVs on average, reflecting a relatively flat trend of supply and demand in the labor market during 2011-2012.

Diagram # 2: Demand and supply in MyJob.uz database

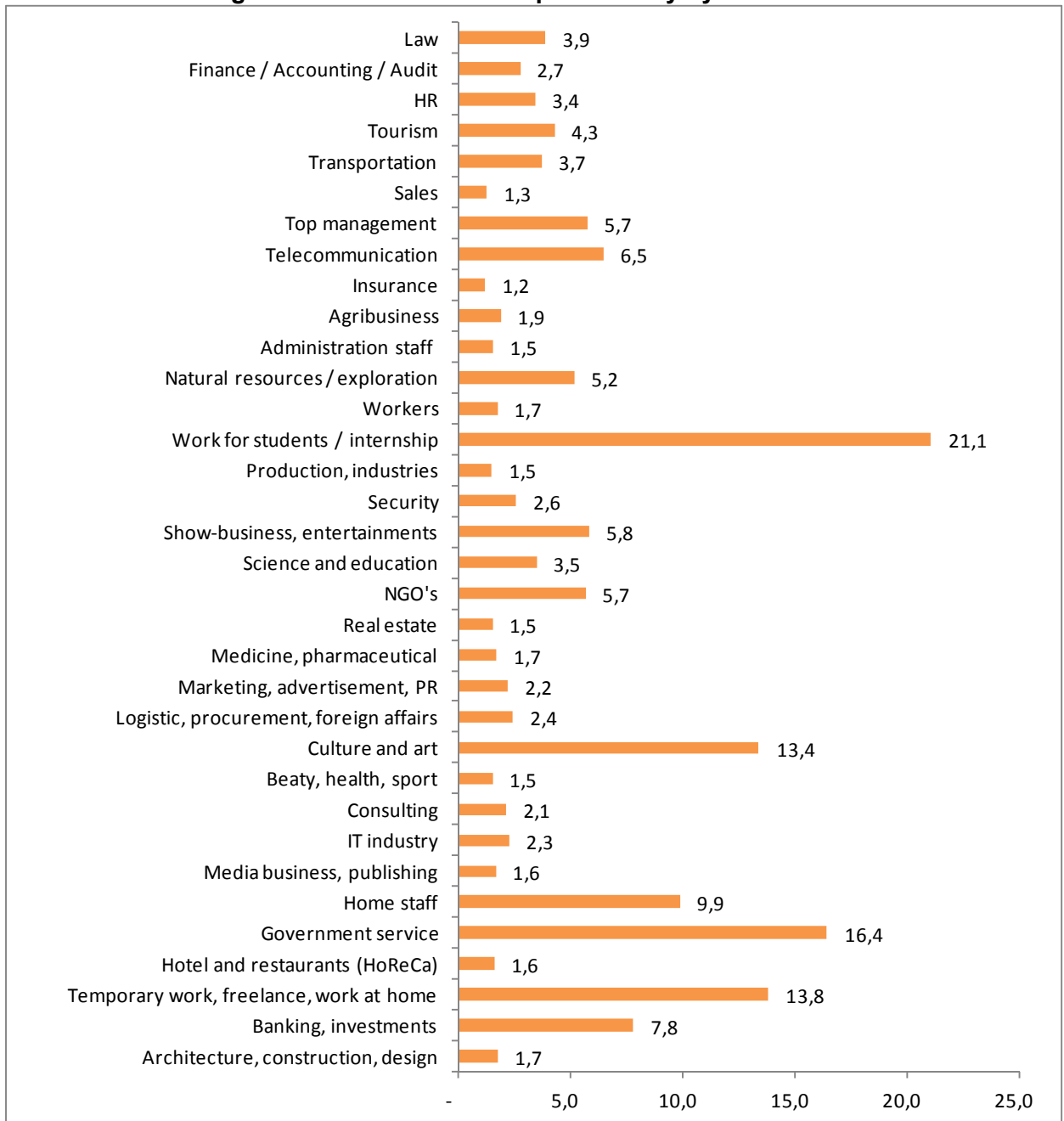


The analysis of supply and demand by industries in 2012 has identified that the biggest number of resumes per vacancy was observed in the "Work for students / Internship" category - 21.1 CVs per vacancy; the second position in terms of a number resumes received was captured by the "Government service work" category - 16.4 CVs per vacancy, and the third place was shared between two industries: "Temporary work, freelance, work from home" - 13.8 CVs per vacancy and "Culture and Art" - 13.4 CVs per vacancy.

A strong competition in the category of "Work for students / Internship" can be explained by the desire of most undergraduates to find a job placement while being students through the internship programs, as well as temporary jobs during the holiday period.

A relatively high level of competition and interest to work in the public sphere can be explained by the fact that many applicants consider the public service work as the most stable place with a minimum risk of termination of the public offices' activity and predictable expectations on wages.

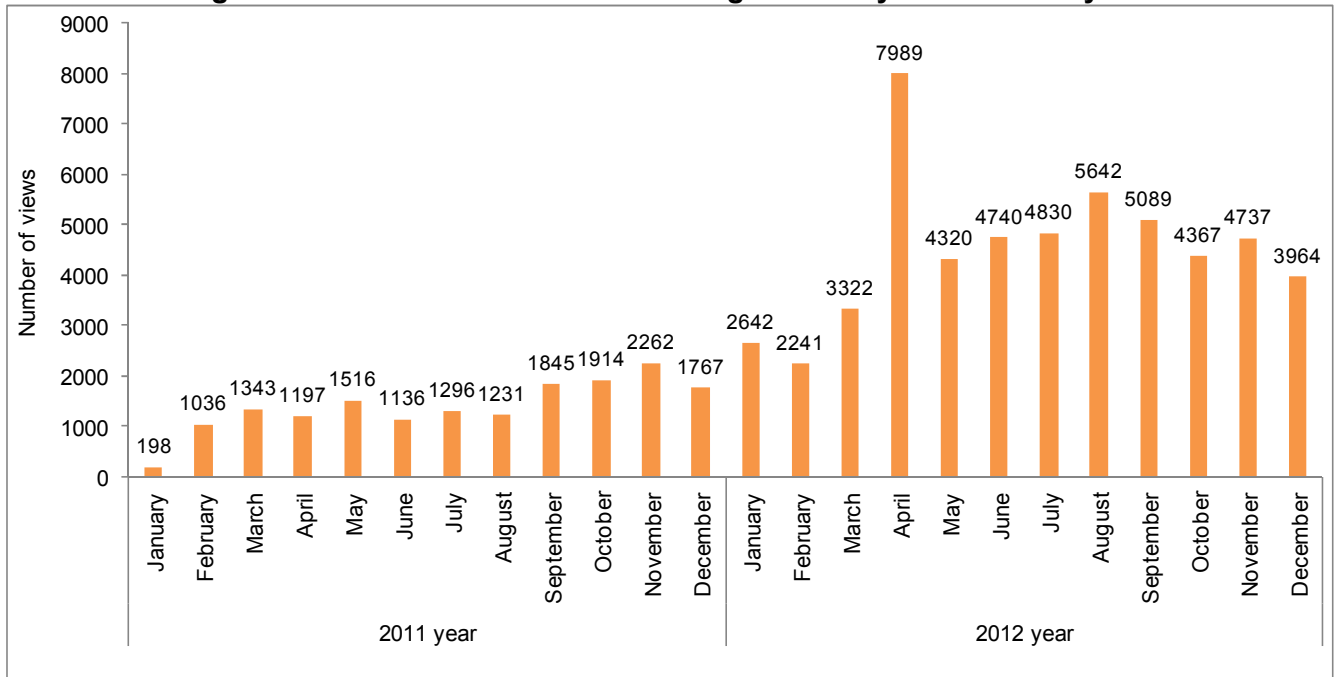
Diagram # 3: Number of CVs per vacancy by industries in 2012



During 2012, a total number of the vacancies posted on MyJob.uz amounted to 6 728 – all coming from different sectors of the economy. The largest number was in the "Sales" category - 989 vacancies on the positions of Sales managers and Sales consultants; the second place was taken by "Finance, Accounting and Audit" sector - 700 vacancies; and the third place went to "IT". High demand for specialists in these areas is explained by the openings of new positions in the companies, overflows and / or staff turnover, as well as by the development and expansion of the companies, which requires constant updates and additional intake of new specialists.

Analysis of the databases' reviews statistics has also confirmed the high activity of the applicants. Comparing 2012 to 2011, one can note that the number of views of the same vacancy posted on the MyJob.uz has significantly increased in 2012. The highest rate was observed in April - 7989 views per 1 vacancy. This high rate can be attributed to the completion of the reporting period in April, following which the applicants who wanted to change their work place, had no obligations in front of their employers any more, and felt free to post their applications online.

Diagram # 4: Statistic of reviews of a single vacancy in 2011-2012 years



As requested by the employers registered in MyJob.uz and HRC databases, we have prepared a ranking of Top-10 most demanded vacancies in 2012.

Table # 7: Ranking of TOP-10 vacancies in 2012 by demand

MyJob.uz	
Position	Ranking
Sales manager	1
Chief Accountant / Accountant	2
IT administrator	3
Engineer / technical specialist	4
Office manager	5
PR manager, marketing specialist	6
Procurement/Logistic specialist	7
Construction engineer	8
Cook for restaurants and cafes	9
Regional representative / pharmacist	10

HRC	
Position	Ranking
Project manager	1
IT administrator/IT specialist	2
Chief Accountant / CFO	3
Engineer	4
Sales Manager / Logistic manager	5
Lawyer	6
Regional representative /	7
HR Manager	8
Construction specialists	9
Interpreter	10

As it can be seen from the above tables, the most popular vacancies in 2012 were chief accountants, experts in the field of IT, and sales managers. This is due to the high turnover of employees in these sectors.

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CONTACTS:

«HR Capital Consulting» LLC

Address:

Office, 9, 3rd floor, Niyozbek Yuli Str., 1
Tashkent, 100000, Uzbekistan

Tel: (+998 71) 150-4230

Fax: (+998 71) 235-6134

E-mail: info@hrc.uz

www.hrc.uz

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