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EMPLOYMENT INDEX

Monster Employment Index Middle East Rises 13 Percent on an Annual Basis in December

October 2013 Index Overview

- Monster Employment Index Middle East recorded a 16 percent growth in online opportunities between October 2012 and October 2013
- Month-on-month, online recruitment activity edged up by an additional 11 percent
- BFSI charted the steepest annual growth among all sectors followed by the Education sector
- Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides saw the most notable annual decline
- Hospitality; and Retail/Trade and Logistics marked the second positive and double digit year-on-year growth in October
- Marketing & Communications/Arts/Creative professionals led all occupation groups in long-term growth. Customer service was only occupation group to register a negative annual growth
- Qatar followed by Egypt led all seven countries year-on-year

KSA

- Online recruitment activity in KSA surpassed the year-ago level by eight percent
- Year-on-year, Retail/Trade and Logistics led all sector
- Among occupation groups, HR and Admin. professionals registered the most notable growth in annual demand for the third month in a row

UAE

- Year-on-year, UAE registered a three percent drop in online recruitment activity
- Hospitality sector exhibited the most notable growth, year-on-year
- Marketing & Communications/Arts/Creative supplanted Health Care to lead all occupation groups by the way of long-term growth.

November 2013 Index Overview

- Monster Employment Index Middle East recorded a 14 percent growth from the year-ago in November 2013
- Month-on-month, online recruitment activity eased three percent
- BFSI continued to lead all sectors by the way of long-term growth
- Retail/Trade and Logistics once again saw fewer opportunities when compared to the year-ago following two positive annual growth
- Production/Manufacturing, Automotive and Ancillary sector registered the steepest decline in online recruitment activity between November 2012 and November 2013
- Among occupation groups, Marketing & Communications/Arts/Creative professionals recorded the most stable and also the most notable annual growth the last four months
- KSA, followed by Egypt, led all seven countries year-on-year

KSA

- Monster Employment Index KSA edged up 14 percent year-on-year.
- Retail/Trade and Logistics continued to chart the highest growth, year-on-year.
- Among occupation groups, Sales and BD followed by HR and Admin. professionals registered the most notable growth in annual demand

UAE

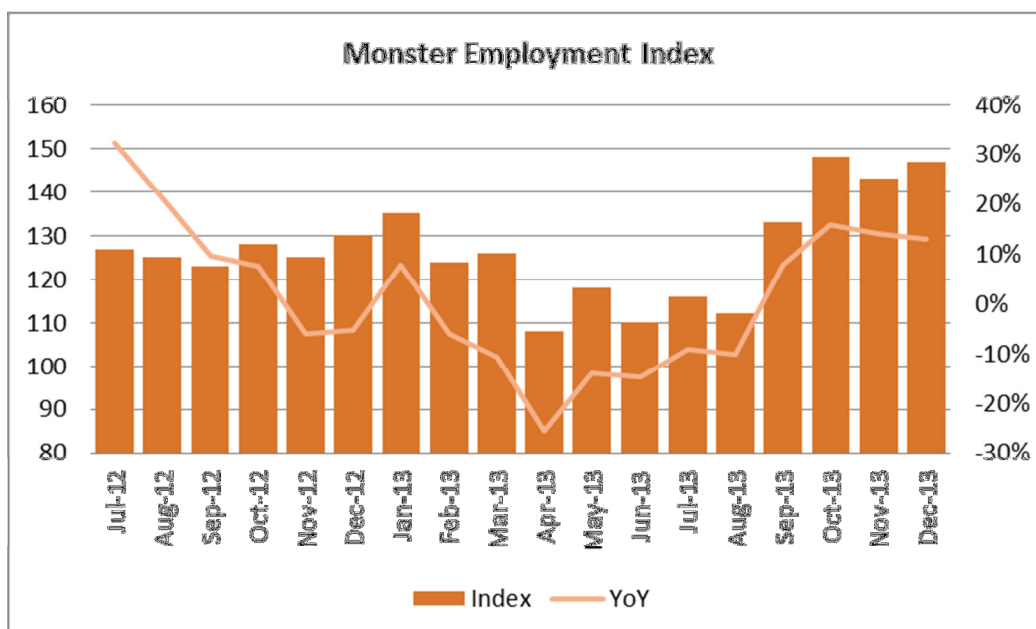
- Year-on-year, UAE registered a negative annual growth for the ninth successive month; down 18 percent.
- Education and Hospitality were the only sector to exhibit a positive annual growth.
- Among occupation groups, Health Care; and Finance and Account professionals saw improved online demand vis-à-vis the previous year

December 2013 Index Highlights

- Monster Employment Index Middle East charts robust growth on the year; up 13 percent in December'13
- BFSI charts the most notable year-on-year growth among all sectors for the third successive month
- Among occupation groups, Finance and Account professionals register the maximum growth in demand from the year-ago
- KSA leads all seven countries once again by the way of long-term growth

The Monster Employment Index is a monthly gauge of online job posting activity in Middle-East based on a real-time review of tens of thousands of employer job opportunities culled from a large representative selection of career Web sites and online job listings. The Index does not reflect the trend of any one advertiser or source, but is an aggregate measure of the change in job listings across the industry.

“Online recruitment activity in the Middle East as is reflected by the Monster Employment Index has shown considerable improvement vis-à-vis the previous year in the last quarter of the year 2013. While the immediate outlook in the GCC remains strong the IMF has warned that unemployment may remain very high in MENA since rapid economic growth in GCC is not accompanied with low unemployment rates. Providing gainful and productive employment for their growing populations outside public sector should be one of the primary concerns for GCC,” said Sanjay Modi, Managing Director, Monster.com (India/ Middle- East/ South East Asia).



Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13	Y-o-Y
127	125	123	128	125	130	135	124	126	108	118	110	116	112	133	148	143	147	13%

Industry Year-over-Year Trends: Monster Employment Index exhibited improved year-on-year trends in seven of the 13 monitored industry sectors in December 2013.

- **BFSI** (up 42 percent) led all sectors by the way of long-term growth for the third successive month. The sector witnessed a year-on-year growth rate of this magnitude for the first time since May'12
- **Oil and Gas** (down two percent) charts fewer opportunities on the year for the eleventh time in a row in December'13 having charted a marginal one percent growth last in January'13
- **Production/Manufacturing, Automotive and Ancillary** (down 22 percent) registered the most notable month-on-month as well as year-on-year drop among all sectors in December 2013. It is notable that Production/Manufacturing, Automotive and Ancillary has been witnessing uninterrupted double-digit annual declines starting April'13

Top Growth Industries

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
BFSI	106	151	42%
Engineering, Construction and Real Estate	118	147	25%
Advertising, Market Research, Public Relations, Media and Entertainment	120	149	24%
Health Care	119	136	14%
Retail/Trade and Logistics	131	143	9%

Lowest Growth Industries

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Oil and Gas	92	90	-2%
Hospitality	151	147	-3%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	95	89	-6%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	77	67	-13%
Production/Manufacturing, Automotive and Ancillary	111	87	-22%

Occupation Year-over-Year Trends: Nine of the eleven Occupation Groups monitored by the Index exhibited a positive growth in annual demand

- **Finance and Account** (up 31 percent) professionals saw the steepest growth in online recruitment activity between December 2012 and 2013 aligning with the growth in the related BFSI sector
- **Marketing & Communications/Arts/Creative** (up 30 percent) saw the long-term growth momentum ease 12 percentage points between November and December 2013. The sector, nevertheless, continued to chart strong year-on-year growth trends
- **Customer service** (down 32 percent) registered the most dramatic annual decline even in December'13

Top Growth Occupations

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Finance and Account	104	136	31%
Marketing & Communications/Arts/Creative	122	159	30%
Legal	80	96	20%
HR & Admin.	126	144	14%
Hospitality and Travel	133	148	11%

Lowest Growth Occupations

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Engineering and Production	115	125	9%
Sales and BD	163	174	7%
Health Care	124	127	2%
Purchase / Logistics / Supply Chain	106	99	-7%
Customer service	102	69	-32%

Geographic Year-over-year Trends: Online job availability improved in four of the seven countries monitored by the Index.

- **KSA** (up 24 percent) saw a 10 percentage point improvement in the rate of year-on-year growth between November and December 2013 to lead all counties monitored by the Index
- **UAE** (down 16 percent) charted the most significant annual decline

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
KSA	94	117	24%
Qatar	116	140	21%
Egypt	117	141	21%
Kuwait	104	115	11%
Bahrain	123	121	-2%
Oman	105	102	-3%
UAE	130	109	-16%

COUNTRY-WISE TRENDS

KSA Highlights

- Monster Employment Index KSA registers a 24 percent growth year-on-year
- **Oil and Gas** leads all sectors by the way of long-term growth
- **Engineering and Production** records the most notable growth in annual demand among all occupation groups

KSA Top Growth Industries

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Oil and Gas	93	133	43%
Advertising, Market Research, Public Relations, Media and Entertainment	89	125	40%
Engineering, Construction and Real Estate	77	96	25%

KSA Lowest Growth Industries

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Production/Manufacturing, Automotive and Ancillary	97	95	-2%
Education	112	108	-4%
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	91	87	-4%

KSA Top Growth Occupations

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Engineering and Production	79	116	47%
HR & Admin.	102	137	34%
Marketing & Communications/Arts/Creative	95	120	26%

KSA Lowest Growth Occupations

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Software, Hardware, Telecom	112	121	8%
Health Care	101	98	-3%
Hospitality and Travel	123	113	-8%

UAE Highlights

- Monster Employment Index UAE contracts 16 percent between December 2012 and December 2013
- **Health Care** leads all sector year-on-year
- Aligning with the related sector, **Health Care** professionals saw the highest growth in annual demand among all occupation groups

UAE Top Growth Industries

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Health Care	116	133	15%
BFSI	117	127	9%
Education	122	130	7%

UAE Lowest Growth Industries

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
IT and Telecom/ISP	107	85	-21%
Production/Manufacturing, Automotive and Ancillary	112	86	-23%
Retail/Trade and Logistics	125	95	-24%

UAE Top Growth Occupations

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Health Care	144	158	10%
Finance and Account	115	122	6%
Engineering and Production	105	109	4%

UAE Lowest Growth Occupations

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Sales and BD	133	102	-23%
Purchase / Logistics / Supply Chain	98	70	-29%
Customer service	108	73	-32%

By Industry

	2012	2013											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Engineering, Construction and Real Estate	118	123	124	122	112	125	122	128	131	139	145	139	147
BFSI	106	116	110	101	92	109	109	121	120	129	154	145	151
Production/Manufacturing, Automotive and Ancillary	111	113	117	117	99	99	82	93	88	95	99	98	87
Retail/Trade and Logistics	131	139	129	122	119	129	132	112	126	150	167	154	143
Oil and Gas	92	91	89	96	97	93	88	90	90	89	90	93	90
IT and Telecom/ISP	99	100	91	89	87	94	91	94	96	101	106	104	102
Hospitality	151	156	145	133	116	123	126	125	120	139	161	150	147
Education	140	145	146	151	140	158	150	148	153	162	156	154	150
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	77	77	78	83	77	71	74	71	71	75	68	66	67
Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery	95	98	117	114	101	103	99	108	92	108	100	91	89
Health Care	119	120	128	142	115	126	119	116	114	120	120	119	136
Advertising, Market Research, Public Relations, Media and Entertainment	120	127	117	115	114	121	123	130	131	136	146	141	149

By Occupation

	2012	2013											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Engineering and Production	115	117	117	118	113	110	112	117	118	122	130	126	125
Finance and Account	104	110	104	103	87	100	99	105	102	115	133	130	136
HR & Admin.	126	140	118	110	100	105	107	117	106	133	148	147	144
Sales and BD	163	175	153	142	140	152	139	151	149	165	189	165	174
Purchase / Logistics / Supply Chain	106	107	117	112	103	98	91	79	81	107	112	114	99
Hospitality and Travel	133	144	129	123	116	118	116	120	122	130	157	145	148
Health Care	124	122	133	149	119	131	126	119	118	122	127	125	127
Software, Hardware, Telecom	105	121	91	88	85	97	95	109	99	122	136	125	115
Marketing & Communications/Arts/Creative	122	107	110	112	108	120	121	127	131	141	159	155	159
Customer service	102	117	95	98	88	100	87	73	61	87	86	75	69
Legal	80	75	73	74	74	83	83	97	90	90	80	87	96

About the Monster Employment Index

Launched in April 2011 with data collected since October 2010, the Monster Employment Index is a broad and comprehensive monthly analysis of online job posting activity in the Middle East conducted by Monster.com. Based on a real-time review of tens of thousands of employer job opportunities culled from a large, representative selection of online career outlets, including Monster Gulf, the Monster Employment Index presents a snapshot of employer online recruitment activity nationwide. The Monster Employment Index's underlying data is validated for accuracy by Research America, Inc. – an independent, third-party auditing firm – to ensure that measured online job recruitment activity is within a margin of error of +/- 1.05%. Monster has taken due care in compiling and processing the data available from various sources for Monster Employment Index, but does not guarantee the accuracy, adequacy or completeness of any information and is not responsible for any errors or omissions or action / decision taken or for the results obtained from the use of such information.

About Monster Worldwide

Monster Worldwide, Inc. (NYSE: MWW - News), parent company of Monster, the premier global online employment solution for more than a decade, strives to inspire people to improve their lives. With a local presence in key markets in North America, Europe, and Asia, Monster works for everyone by connecting employers with quality job seekers at all levels and by providing personalized career advice to consumers globally. Through online media sites and services, Monster delivers vast, highly targeted audiences to advertisers. To learn more about Monster's industry-leading products and services, visit www.monster.com. More information about Monster Worldwide is available at <http://about-monster.com>.

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