Employment trends in all sectors related to the sea or using sea resources

Malta

European Commission
DG Fisheries and Maritime Affairs

An exhaustive analysis of employment trends in all sectors related to sea or using sea resources

Country report – Malta

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1.0 Summary[I]

The Maltese maritime sectors provided some 35,600 jobs in 2004. Coastal tourism is by far the largest sector generating 28,000 jobs alone[II]. Other maritime sectors provided just over 7,600 jobs of which seaports and related services are the biggest sector (16% of total employment) with just over 5,500 employees.

Figure 1.1 Share (%) of employment in different sub-sectors, 2004

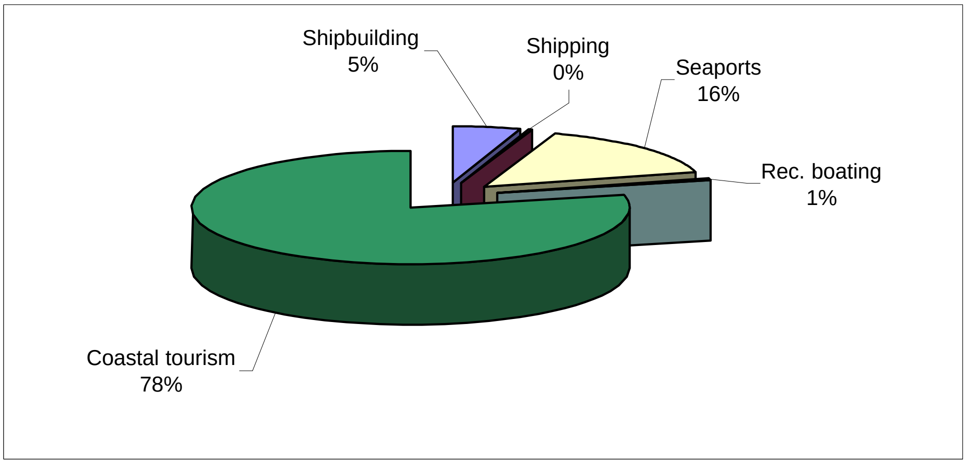


Table 1.1 Employment in sea related sectors, 1995-2005

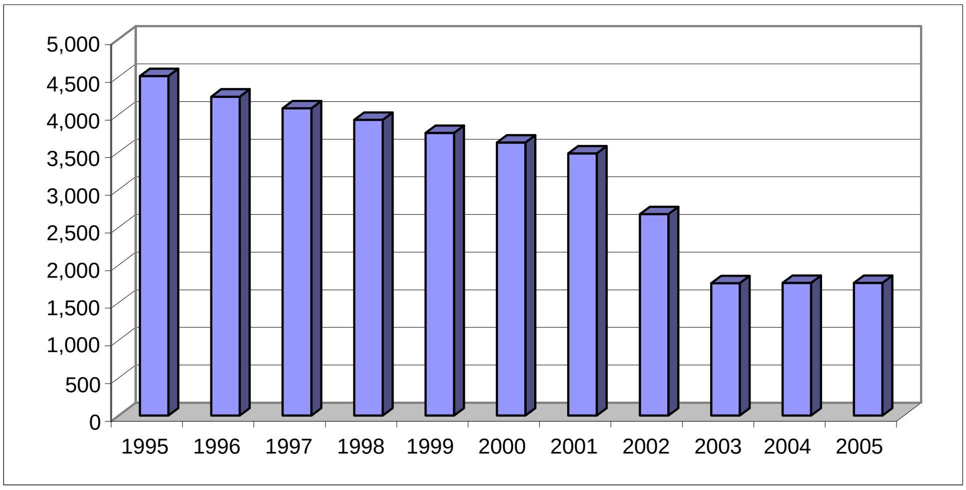
	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Shipbuilding	4,510	4,237	4,083	3,928	3,755	3,628	3,485	2,678	1,757	1,765	1,763
Shipping	-	-	-	-	-	-	-	-	-	137	119
Seaports	-	-	-	-	-	-	-	-	-	-	5,536
Rec. boating	-	-	-	-	-	-	-	-	-	210	-
Coastal tourism	-	-	-	-	-	-	-	-	-	28,000	-

Source: ECOTEC Research & Consulting, 2006

The shipbuilding industry has experienced considerable decline over the past decade; nearly 2,800 jobs were cut between 1994 and 2004. The biggest reductions have taken place since 2001.

[I] This report excludes employment related to fishing.
[II] The figure for coastal tourism relates to 2006, fishing is excluded from this study.

Figure 1.2 Employment trends n the shipbuilding sector, 1995-2004



2.0 Shipbuilding

The shipbuilding industry used to be one of the three pillars of the Maltese economy, but in recent years it has faced serious difficulties and job cuts. In 2003, the companies were finally re-organised and Malta Shipyards Ltd[I] was created. Malta shipyards Ltd is made up of the Cospicua Site (Malta Dry Docks), the Marsa Site (Malta Shipbuilding Company Limited), Manoel Island Yacht Yard Limited and the Malta Shipyards Tank Cleaning Station.

The Malta shipyards and dry docks had a strong reputation for quality products, reliability in delivery and customer satisfaction. Historically, the sector was very important due to the British occupation and the military production in the war period when over 12,000 skilled workers were employed. But since 1997, the company has been losing an average of MTL 0.5 million annually. The adverse financial situation led to the restructuring of the sector.

The main strength of the Maltese shipbuilding sector is its excellent location in the Mediterranean basin. However, a shortage of blue collar and skilled workers and unattractiveness of the sector are its key weaknesses. The most important threats for the sector are competition from the non-EU Eastern European and Asian countries due to lower labour costs.

2.1 Employment trends

The table overleaf demonstrates the number of people employed by Malta Dry Docks Corporation (MDD) and Marsa Shipbuilding Company Limited (MSCL) between 1995 and 2003. The data after 2003 represent employment in the Malta Shipyards Ltd. The new company absorbed 1,760 workers from a workforce of 2,600 under new conditions such as the introduction of a shift system which substantially reduced working overtime. The merger resulted in a 34% reduction of employment. Nearly half (418 out of 900) of the workers who were facing redundancy chose to retire early. The remainder were employed by another new company, Industrial Projects and Services Ltd, or found jobs in the civil service and public-private partnerships.

Despite these job cuts, Malta Shipyards Limited is still one of the largest employers in Malta employing over 1,760 English speaking tradesmen. However, the sector has lost

[I] Malta Shipyards Ltd offers a substantial range of products to the general maritime, shiprepair, offshore and energy, yachting and conversion sectors from one of the largest facilities in the Mediterranean, and that covers as well the tourism industry (yachting)

61% of employees of the past decade (4,510 employees in 1995 down to 1,763 employees in 2005).

Table 2.1 Employment in the shipbuilding sector in Malta, 1995 - 2005

YEAR	MDD	MSCL	TOTAL
1995	3423	1087	4,510
1996	3355	882	4,237
1997	3230	853	4,083
1998	3067	861	3,928
1999	2913	842	3,755
2000	2791	837	3,,628
2001	2654	831	3,485
2002	1973	705	2,678
2003	1443	314	1,757
Malta Shipyards Limited (MSL)			
2004	n.a	n.a	1,765
2005	n.a	n.a	1,763

Source: Human Resources department Malta Shipyards Ltd.

Those shipyard workers who were taken over by the Malta Shipyards Ltd. were employed under a new Collective Agreement that expires in 2008. During that time they remain on the government pay-roll, although the Malta Shipyards Ltd receives an agreed (decreasing) amount of State Aid.

Workers from the former dry docks were highly qualified, thus the unions refused to have them reallocated to jobs requiring lower qualifications. This applied especially to younger workers. As a result, a long dispute arose between the trade unions and the government, which concluded with the re-allocation of young and experienced workers across different sectors in order to maximise their expertise. The older workers were advised to accept the early retirement scheme.

Historically, Maltese shipyards were mainly dedicated to ship repair and storage for repair. This legacy is still felt by the industry in terms of its expertise. In the last years the sector had to diversify its production in order to compete successfully. The diversification included more sophistication in their services and products, such as rehabilitation of offshore facilities or producing vessels for seismologic laboratories. Since 2001, the sector has offered improved efficiency and cost effectiveness to the key markets of offshore and energy, conversion and commercial ship repair. Strategic partnerships have been formed to broaden expertise in specialised services such as surface preparation, advanced coatings application and specialised engineering.

2.2 Employment projections

The Maltese shipbuilding industry is currently facing a shortage of both skilled and manual workers. The need for expertise and specialist skills has been partially met by the Malta Shipyards Ltd by employing Polish and Bulgarian employees.[I] The Maltese workforce is experienced and well trained in all major trades, but only in relation to the "traditional" ship repair industry. The Maltese workforce is lacking some specialised skills that are increasingly demanded by the shipbuilding sector.

2.3 Skills and training

Currently, there is a skill mismatch between the need to diversify and specialise and the workforce profile. The lack of interest in the industry has resulted in the lack of blue collar and skilled workers.

3.0 Shipping

The Maltese flag has a fleet of over 1500[II] merchant vessels for a total gross tonnage in excess of 25 million GT. As at end December 2005, Malta ranked as the 8th largest register in the world and the 2nd largest in Europe. Shipping has been reported to generate business worth just under 1% of GDP.

The Administration is run on an open register system, which essentially does not require ship ownership and operations to be essentially connected to local interests. Within this context, seafarers engaged on board Maltese ships are predominantly of foreign nationality. According to the Malta Maritime Authority's Seafarer Certification Unit, the Authority has issued circa 42,000 flag state endorsements; Malta has only 119 certified seafarers (85 officers; 34 ratings). Together with another six European Member State international registers, the Malta flag is classified as a flag of convenience by the International Transport Workers Federation.

According to the Malta Maritime Authority, the increase in the number of ships under the Malta flag has resulted (and will continue to result) in an increase in blue - but predominantly white - collar workers. The maritime Administration is following a continuous training programme to keep its staff completely up to date with international legislation and the European maritime Acquis, as well as latest technological developments and current best practice in the implementation of the maritime regime. This follows an intense

[I] This information was obtained through a phone conversation with Frank AZZOPARDI from the Malta Freeport Human Resources Department

[II] Excludes vessels under 100 GT and pleasure yachts.

capacity building exercise undertaken in the past decade in order to consolidate the Administration's capabilities in fleet management and honouring of Malta's international commitments in the maritime sector. It is estimated that there are about 100 persons in the private sector engaged in ship registration.

4.0 Seaports

Historically, due to its location, Malta's harbours were used to repair and refit vessels. During the British occupation, Malta became the most important centre for trade and a strategic shipyard in the Mediterranean. In the 1950s, Malta's ports started to play a key role in the tourism industry. The most important ports are Port of Valletta and the Port of Marsaxlokk and the following provides general information on the main ports:

- The port of Valletta is a multi-purpose port equipped to offer a large spectrum of maritime services including various cruise/ferry and cargo berths, specialised grain and cement silos, petroleum installations, bunkering facilities, ship repair and building yards, ship chandelling, reception facilities and other ship related services. A private yacht marina has recently been developed in the Grand Harbour and compliments the large marina operated by the Malta Maritime Authority (the government agency responsible for maritime affairs and transport) in the adjacent port of Marsamxett. New privately operated passenger handling terminals are being developed in the port of Valletta for cruise and ferry passenger activities.
- The Port of Marsaxlokk, situated on the South coast of Malta, consists of a number of terminals that handle containers and bulk petroleum products. It also includes a fishing port and leisure facilities. One of the main terminals is the Malta Freeport Terminal which is a Customs Free Zone and consist of container terminals; an oil products terminal namely Oil Tanking Co.Ltd., and an industrial warehousing facilities. The wet bulk terminals are operated by bunker operators and Enemalta Corporation which is the local operator of energy sources and importer of petroleum products.
- Port of Marsamxett: Yachting facilities are concentrated in this port, thus it is considered as a leisure port.
- Port of Mgarr is a small but intensively used multipurpose port, and it is the only port connecting Gozo with Malta. The Mgarr Harbour in Gozo (together with the corresponding Cirkewwa harbour in north of Malta) is vital for the economic development of this second largest island in the Maltese archipelago. Gozo Channel Co Ltd provides the link between the islands of Malta the mainland, and Gozo. Passenger and vehicle service is provided all the year-round between Mgarr Harbour (Gozo) and Cirkewwa (Malta).

The main strengths of Malta's seaports are their excellent and strategic location in the Mediterranean, together with the fact that they have combined tourist/pleasure activities and commercial/trade/industrial activities.

The last ten years have seen a consolidation of the Port of Valletta as a major port of call for cruise liners in the Mediterranean. Recent annual figures have reached record levels with over 300 cruise liners, carrying more than a quarter of a million passengers, visiting the Port of Valletta.

Cruise Statistics					
Number of	**2001**	**2002**	**2003**	**2004**	**2005**
Cruise Liners	358	407	418	334	327
Passengers	273,516	357,401	389,361	291,821	320,263

The refurbishment of the Sea Passenger Terminal, which handles more than 400,000 passengers a year, has attracted new shipping lines, thereby strengthening the network between the island and other Mediterranean ports.

4.1 Employment

On the basis of calculations of Malta Maritime Authority the Maltese ports generate employment for over 5,500 individuals. A high percentage of total port related employment is linked to the tourism industry (transport of passengers, vessels, shops / restaurants foreshore) and hence it is affected by the tourism flows that have increased by 8% in the last 2 years.

Table 4.1 Employment in port related services in 2005/2006[i]

Employment in port related services	
Malta Maritime Authority	236
Ship Agents and Brokers	3,000
Service Providers	1,500
Terminal operators (Valletta Gateway Terminals, VISET, Oil Terminal, Malta Freeport)	700
Ship registration personnel	100
Total	**5,536**

Source: Malta Maritime Authority, 2006

[i] Some of the activities could also be classified as maritime service activities on the basis of sectoral definitions of this stuty.

A more detailed breakdown of direct employment in port related services is provided below.

- Malta Maritime Authority

The Malta Maritime Authority (MMA) comprises three Directorates having separate and distinct duties and responsibilities, namely the Ports Directorate, Yachting Centres and Merchant Shipping. All sectors of maritime activity in Malta are co-ordinated by the Malta Maritime Authority, which operates a comprehensive maritime centre, adequately supported by administrative, legal, fiscal and infrastructure framework. The MMA workforce currently amounts to 236 employees.

- Shipping Agents and Brokers

In Malta there are over 100 shipping agents which offer services both as shipping and port agents for a number of reputable shipping companies rendering a professional and trustworthy service for vessels in port as well as offshore. The services provided encompass: agency work, bunkering, chartering, repairs, brokerage, ship supplies, customs clearance, bonded warehouse facilities, freight/forwarding for groupage and full loads, etc. The number of full time employees working for shipping agents amounts to about 3,000 workers.

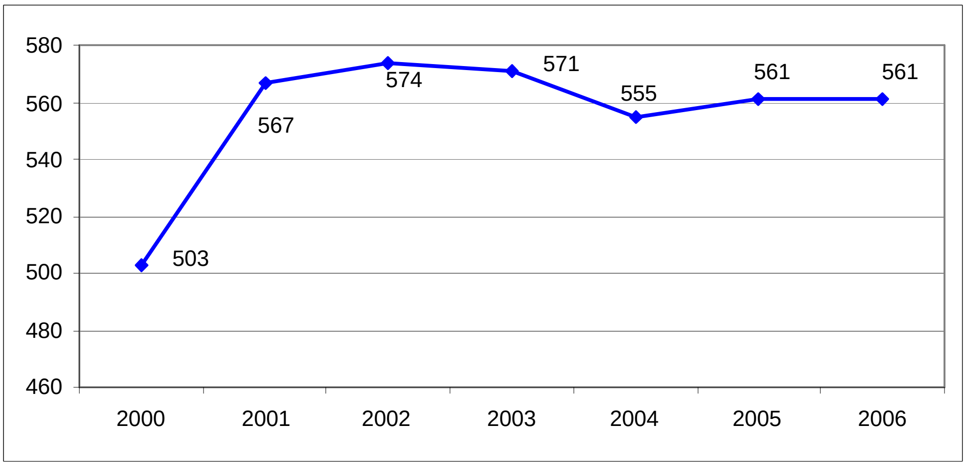
- Malta Freeport

Malta Freeport is one of the leading transhipment ports in the Mediterranean, whereby cargo is discharged from large mother vessels and then relayed to regional ports by regular feeder vessels. It has an established network which connects it, through regular services, to 100 ports worldwide, approximately 60 of which are in the Mediterranean and Black Sea.

Malta Freeport Terminals Ltd was privatised on 5th October 2004 and is owned by the CMA-CGM Group. The company was granted a 30-year licence to operate the two container terminals, warehouses and the Freeport Centre office complex.

The Freeport of Malta deals with cargo handling and merchant shipping activities and employs 561 workers directly. The port also employs 250 manual workers on a part time basis. Over 95% of all employees are of Maltese origin.

Figure 4.1 Employment in the Freeport of Malta, 2000-2006



- Oil Terminal

An Oil Terminal which is operated by Oiltanking Malta Ltd a subsidiary of Oiltanking Gmbh. It employs a total number of 40 workers. The terminal has a total berthing length of 750 metres with a maximum draft of 16 metres split into 3 berths. One of the berths can handle vessels up to 120,000 dwt and a recent addition is Jetty 4 with a length of 200 metres which can handle vessels up to 50,000 dwt. The current total tank capacity of 18 tanks is 361,600 cubic metres, and range from 5,000 cubic metres to 35,700 cubic metres tanks. Cargoes handled include crude oil, fuel oil, feedstocks, gas oil, jet fuel, gasoline and components. Special services include blending, butanising, and injection of additives, tank-to-tank transfers and ship-to-ship operations.

- VISET

The development of the Cruise Passenger Terminal is now being managed by VISET, a private consortium, with the Malta Maritime Authority taking the role of regulator. The Valletta International Sea Terminal, due to the huge increase in the passenger arrivals and high quality standards required and offered by the Tourism Authorities has been awarded a contract for the construction and operation of Malta's new cruise terminal and ferry passenger terminal. Viset employs a total of 40 individuals. The project includes a large waterfront shopping and leisure complex within a set of buildings with a considerable architectural and historical value that will be fully restored and rehabilitated. This represents a new source of employment directly linked to the tourism industry within the port related activities.

- Valletta Gateway Terminals

Singapore-listed ports equipment firm Portek has secured a 30-year concession to operate a multi-purpose terminal in Malta. The concession was secured from the Malta Maritime Authority by Valletta Gateway Terminals, in which Portek has a 55% stake. The Maltese conglomerate Tumas Group, which has interests across Europe in the hotel and property development industry, holds the remaining 45%. The concession, starting 1 July 2006, will involve VGT handling containers, ro-ro containers, break bulk and cars at the Port of Valletta. VGT employs a total of 100 employees.

- Service Providers

A substantial number of companies, which provide direct services for the Ports in Malta, employ a total of 1500 employees. Main service companies are Tug Malta Ltd, Gozo Channel, Malta Maritime Pilots, mooring services, port workers, foremen, tally clerks, hauliers together with six licensed bunkering companies. Bunkering activities have become one of the major activities in the Maltese maritime sector.

4.2 Employment forecast

The wide and rapid development of Malta's ports suggests that new potential areas for employment growth can arise in the coming decade. These areas include passenger traffic, cargo handling and bunkering, berthing and storage facilities. On the other hand technological developments are likely to curb major developments in employment. It is also worth mentioning that increasingly large vessels are visiting the Maltese ports. That means a need for investment in technical and human resources.

4.3 Training and skills

There are different types of training according the organisations//industries working in and for the port.

- Maritime Institute

The Maritime Institute which forms part of the Malta College of Arts, Science & Technology is the only institution in Malta entrusted with the education and training of seafarers. The Maritime Institute provides young men and women with the opportunity to embark upon a career at sea as an officer in the merchant navy. The school runs a comprehensive training programme for commercial vessel operators and small craft owners. These courses are run in conjunction with the MMA Ports and Yachting Centre Directorates.

- Other Training Facilities

The Malta Freeport has established an in-house training centre. The Freeport Training Centre operates in close collaboration with the Port of Rotterdam College for Transport and Shipping and is responsible for the ongoing training of all Freeport personnel. They offer two types of training:

► Short courses on specific issues; and
► Long-term courses directly linked to the University of Malta, as well as UK Universities.

The training programmes of the Malta Maritime Authority consist of:

► Long-term training includes diploma, graduate and post-graduate courses both in Malta and abroad; and
► The short training programme includes attendance and participation of its personnel at a number of short courses, seminars and workshops and familiarisation visits in Malta and abroad.

The programme is financed both from funds of the Authority or through technical assistance schemes such as pre-accession and transition facility funding made available by the European Union.

5.0 Recreational boating

No recent employment data has been provided by the Maltese stakeholders on employment related to marine leisure industry but according to the study conducted by the British Marine Federation on employment in the recreational boating sector the sector created 210 jobs in Malta in 2004 of which 200 were in the service field and 10 in marine equipment manufacturing. According to the Maltese stakeholders employment in this sector is however likely to be somewhat higher than the findings of this study indicate. In spite of this no further figures were obtained.

The future of the sector depends on the attractiveness of the island as a tourist destination, development of new marina berths and also on upgrading of facilities and services[I] to attract a greater share of high value added international businesses such as yacht repairs and winter berthing. Although there are three new private yachting marinas operating, the industry still lacks temporary berthing to cope with the heavy influx of visiting yachts in peak months of July and August. The sector could also benefit from further expansion of hard standing facilities which would allow it to cope more effectively with the increase of both local and foreign yachts.

One of the possibilities that could have an impact on employment is the development of cruising holidays[II] along a hub concept for more experienced yachtsmen who could sail to

[I] This is also linked to the upgrading of tourism services and facilities to target tourist with a higher expenditure level.
[II] This is part of the tourism development policy promoted by Malta Tourism Board

nearby countries, as well as the development of possibilities and opportunities for less experienced sailors.

Another possibility for the sector that can go on the lines of promoting tourism activities all year trough, is to apply it to yachting and hence facilitate the attract over-winter months. To do so necessary arrangements will have to be done but according to the Malta Maritime Authorities the potential is there, and if there is a demand then there can be a niche for employment.

In the light of these opportunities the Maltese Government, in cooperation with the MTA, has identified yachting as one of the target growth sectors. Indeed the Malta Maritime Authority and the Malta Tourism Authority are collaborating together to foster greater synergies and ensure that this sector continues to grow.

6.0 Coastal tourism

Tourism is one of the pillars of the Maltese economy and all tourism can be categorised as coastal related tourism due to the small size of the country. Until 1994, Malta registered growth in tourist arrivals and earnings from tourism. 1995 and 1996 brought a decline which was caused mainly by the announcing of the removal of the Forward Buying Rate scheme. This grant system was set up to promote and encourage tourist arrivals. This scheme was replaced by the Tour Operator Support Scheme, which was introduced after tourism authorities realised that the unfavourable exchange rates would further lower Malta's competitiveness. However, the scheme was phased out in October 2001 and was replaced by other marketing initiatives.

During this decade, the number of beds on the market exceeded 40,000. The growth occurred in the large five- and four-star hotels which were the target of the government’s policy to develop this category of accommodation[I]. Malta has been transformed into a destination which has the potential to offer attractions and services to the wide category of audience. Malta attracts 1% of total number of tourists to the Mediterranean basin. It is marketed not only as a summer holiday destination but also increasingly as an off-peak destination. There have been particular niche markets developed such as water skiing, yachting and diving.

In 1998, it was estimated that the full impact of tourism on GNP was 24.2%[II]. At a direct level, the impact of tourism earnings on GNP was estimated at 10%. Tourism also

[I] National Development Plan For Malta (2003-2006) TOURISM SECTOR PHASE 1: ANALYSIS OF SITUATION

[II] Mangion ML & Vella L, 2000?

accounted for 22% of Government Income, 11% of imports and outflows and for 17% of full-time equivalent employment.

The strengths of the tourism sector in Malta lie within the political stability and safety of the country. The country also features very high quality accommodation establishments. The weaknesses include the abundance of low-cost package holidays and low quality of infrastructure, mainly inland transport, in the island of Gozo.

The opportunities for tourism development lie primarily in high quality tourism and cruise line passenger transport. The latter is strengthened by the development of the port infrastructure to allow increased passenger traffic. Malta aims to 'deseasonalise' its tourism to allow more tourists throughout the whole year. This would entail expanding the services and tourist attractions, also by increasing the target tourist audiences through offices in other countries.

6.1 Employment trends

The Maltese travel and tourism industry provides 28,000 jobs this year, thus accounting for 18.4% of total employment in the country. The Malta Tourism Authority states that the indirect and direct jobs supported by tourism industry make up 27% of total employment (41,000 people).[I] According to the Tourism Satellite Accounting by the WTTC the travel and tourism economy of Malta generates 48,000 jobs in Malta this years, thus accounting for 31.9% of total employment.

A large part of tourism employment is in hotels and catering. Some 8,400 and 7,323 people were employed full-time and part-time respectively in 2004 (see table below).

Table 6.1 Full-time and part-time employment in hotels and catering establishments (yearly averages)

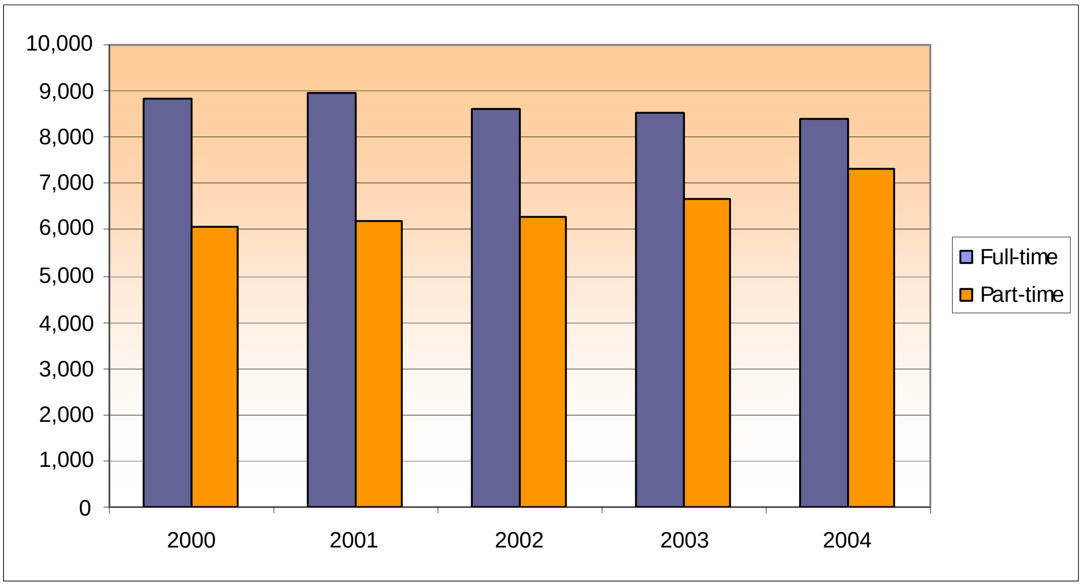
Year	Full-time	Part-time
2000	8,828	6,057
2001	8,946	6,203
2002	8,628	6,264
2003	8,536	6,662
2004	8,404	7,323
2005	8,485	8,117

Source: Malta Tourism Board

[I] Malta Tourism Authority (Tourism and the Maltese Economy)

Both full-time and part-time employment in the hotel and catering sector increased in 2005. However, the full-time employment increased only slightly whereas the part-time employment increased significantly. As shown in the tables above, the share of the full-time employment in hotels and catering establishments gradually decreased over the 2000-2005 period, while the share of part-time employment has steadily increased. The increase of part-time employment has been greater than the decrease of full-time employment. The figure below illustrates this trend.

Figure 6.1 Average Full-time and Part-time Employment in Hotels and Catering Establishments 2000-2004



Source: Malta Tourism Board

6.2 Employment forecast

In 2005, the Maltese Tourism Authority finalised a Skill and Employment Forecast for the Tourism sector, which aimed to estimate the number of jobs as well as current skill shortages and future skill needs[I]. The purpose of this survey goes on the lines of the MTA policy to improve and grow awareness of the potential and opportunities of the tourism industry for the Maltese Economy. The study concluded the following:

- The short-term forecast of FTE employment in hotels and catering for the period from 2004 to 2009 provides for an employment scenario, which is based upon the following assumptions:

[I] Malta Tourism Board

- ► MTA's overseas marketing expenditure influences tourist arrivals and guest nights with consequences on Gross Income from tourism;
- ► World economy continues with present performance unchanged;
- ► MTA overseas marketing expenditure is kept at MTL 7 million in 2004 & 2005, MTL 6million in 2006, MTL 7 million in 2007 and an annual increase of 2.5% year-on-year thereon[I].

According to this scenario, by 2009, 1,100 FTE jobs will be created reaching a total of 12,594 FTE jobs in hotels and catering establishments.

According to the Tourism Satellite Accounting an increase in employment of 17.8% is expected for the period of 2006-2016 (5,000 new jobs). A growth of 16.7% has been forecasted in employment in the wider travel and tourism economy for the same period.

6.3 Training and skills

The importance of the tourism industry to the economy and everyday life in Malta can be demonstrated by the fact that it is the policy of the Malta Tourism Authority (MTA)[II] to start education and training on the tourism industry already in primary schools, as well as by fostering cooperation between the Institute of Tourism Studies, tourism trade and educational institutions. Also, the policy of the MTA underlines the importance of lifelong training and focus on new skill requirements. These new skills include managerial skills, especially of managers of family owned enterprises. The policy also stresses the importance of better recruitment and improving the image of tourism. The policy also highlights the fact that tourism offers jobs not only for the skilled people but also for low-skilled ones in variety of areas, both directly and indirectly.

The Institute for Tourism Studies and the University of Malta are the main education providers for the tourism industry on the island. The University now offers a course leading to a Bachelor degree in Tourism Studies. The number of students, who graduated from the Institute of Tourism Studies, in the 1990 to 2002 period, amounts to 1,112.[III] Malta Tourism Authority also runs a programme for semi-skilled and unskilled workers. The programme is targeted at covering the needs of the core tourism services as well as the related industries. The training includes customer services culture and business support in implementing best practices[IV].

[I] 1 Maltese lira (MTL) equals approximately €2.30

[II] Skills and Competence Analysis in Tourism – Malta Tourism Authority November 2005 (PRESENTATION)

[III] Malta Tourism Authority

[IV] Malta Tourism Authority

Apart from the Institute for Tourism Studies and MTA, various tourism establishments provide on-the-job training to their employees. In 2001, 78% of accommodation establishments, 69% of catering establishments and 76% of travel agencies/destination management companies provided training during employment to employees[l]. That training was on the job-training and was accommodated to the needs of the market and the existing skills of the workers. The whole is part of the MTA initiative to give a boost to this industry

Despite the presence of courses offered both by public and private organisations there are some skills shortages in the sector. According to the Employment and training survey of the Malta Tourism Authority, the main skill shortages in the sector are skills related to the attitude towards work and the personality. Also, the workforce does not represent sufficient soft skills. Job specific skills are insufficient only in 5% of reported cases.

[l] Employment and Training Survey (2001)