Outlook on Labour Needs of Private Sector

2022

Department of Labour
Ministry of Labour

Compiled by
Statistics Division

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Publication
October 2021
Department of Labour
“Mehewara Piyesa”
Narahanpita
Colombo 05

Printed by
State Printing Corporation

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Preface

The Covid 19 has had adverse effects on all economic activities led by the private sector in Sri Lanka. The Department of Labour, conducted e- surveys to measure the impact of the Covid 19 disaster on the private sector labour market by two phases in April 2020 and February 2021.

The measures taken by the government to control the Covid-19 disaster, such as lockdowns and travel restrictions, had a severe impact on the Sri Lankan economy as well as the labour market. In the aftermath of the third Covid wave, the government took valuable steps to vaccinate all persons, especially those of working age, in order to strengthen the economy and to accelerate the export sector in particular.

As the Department of Labour, we have decided that this is the right time to support the Government and policy makers in taking appropriate action to improve the quality of the labour market for a better future. Therefore, we have decided to identify the labour demand of private sector companies for the year 2022 and to identify the changes that have taken place in the labour patterns in the labour market during this period.

The Statistics Division of the Department of Labour was entrusted with the task of conducting an electronic survey to study the labour requirements of the private sector for the year 2022.

It is a pleasure to express my gratitude to all the companies who participated in this survey devoting their precious time which enables the Department of Labour, to foresee the labour market requirements in the next year. In the meantime, I greatly appreciate the support of all parties who have assisted us in making this survey and study a success.

B.K Prabath Chandrakeerthi

Commissioner General of Labour

Executive Summary

The Covid 19 epidemic has crippled much of the island's economic activity, causing disorder on public health, jobs and livelihoods, with annual economic growth slowing to 3.1 percent in 2020. It is a must to have a robust and consistent economic performance to improve and overcome this dire situation of the country. The private sector accounts for 42.7 percent of employees and 2.5 percent of employers contributing to the Sri Lankan economy (Labour Force Survey, 2020). Therefore, the Department of Labour has decided to identify the labour demand required to meet the private sector targets for the coming year and to explore the new directions regarding the country's labour interests in the future with the aim of re-strengthening the Sri Lanka economy.

The e- survey was planned and conducted in July 2021 and extended up to September 2021. Out of the companies responded, 45 percent recorded labour need for 2022. Out of these, nearly half of the companies are situated in Colombo district while Western province covered three forth of them. The highest demand of labour is requested by the large companies with current employment of more than 100.

When look at the labour requests by economic activities, 69 percent were recorded to the Manufacturing sector while Trade sector reports 15 percent. It is interesting to note the high demand for female labour in several economic activities namely, the Plantation sector, ‘Manufacturing of food, beverages and tobacco’, ‘Manufacturing of Textile, wearing apparels and leather products’ and ‘Human health ‘. In Occupational categories (ISCO Classification), high demanded occupations were reported for ‘Plant and Machine operators and assembles’, ‘Technicians and associate professionals’, ‘Services and sales workers’ and ‘Elementary occupations’ by 52.1 percent,16.4 percent , 13.1 percent and 11.6 percent respectively. The highest educational qualification preferred to ‘Plant and Machine operators and assembles’, is passed ordinary level exam.

The list of top 30 jobs shows the changes and emerging patterns in labour requirements for 2022. 'Sewing machine operators' accounted for almost half of the labour requirements, while 22 per cent are obtained by 'Manufacturing supervisors' and ‘Manufacturing labourers n.e.c’. ‘ICT operations technicians’ and ‘Software developers have acquired positions in the top 30 list for the next year. Compared to past data for 2017 and 2020, there an upward trend is reported for ‘sewing machine operators', 'manufacturing operators', 'stall and market sales'. Meanwhile, Security Guards’, ‘Cleaners and helpers, 'General office clerks' and ‘Commercial sales representatives’ showed a decline in demand from 2017 to 2022.

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CHAPTER 1

Introduction

1.1 : Background

The COVID-19 pandemic started to spread globally in the latter part of year 2019, reached Sri Lanka in early 2020 and spread rapidly throughout the country within a few months. Even though the government had implemented many measures, such as imposing full and partial lockdowns, halting mobility between provinces and executing roadblocks etc. within the period of 2020-2021 the pandemic outbreak turned into a plague in mid-2021. This pandemic situation crippled many economic activities, caused devastating impacts on public health, employment and livelihoods, and caused a heavy decline in the annual economic growth rate in 2020. Facing great uncertainty about the duration of the pandemic, many businesses were compelled to close-down either permanently, temporarily or faced issues of recruiting new workers to their workforce during this period.

The government has taken various actions particularly to protect the health of working-age people by accelerating the vaccination programs and lifting prevailing strict rules on mobility for the boost the industry sector so that it would perform better as it is the main contributor in earning foreign currency for the country by exports. Meanwhile to negotiate with the new situation in the country, the economic activities also has changed to some extent. Many new activities have emerged in the industry sector and the service sector, especially activities based on GIG economy and E-trade has become very popular among general public.

Therefore, it is the best time to look forward positively to re-strengthen the country's economy to have an inclusive and sustainable economic growth. It is a must to have a robust and consistent economic performance to improve and overcome this dire situation of the country. As the private sector plays an imminent role in Sri Lankan economy, the Department of Labour decided to recognize the expected labour demand of private sector for year 2022 to achieve their targets and to explore the new direction of the country's labour interests in the future with the aim of re-strengthening the Sri Lanka economy.

To achieve this, a quick study was planned to be conducted on an e-platform to see the directions of labour needs of the private sector companies to meet their expected targets for the year 2022.

1.2 : Objectives

1. To identify the occupation need of the Private sector for year 2022
2. To identify the major industries with high employment need in 2022.

3. The sex and educational preference of occupations
4. The changing pattern of the labour demand

1.3 : Target Population

All private companies /establishments enterprises that belong to agriculture, industry, trade and services covering the entire country

1.4 : Survey Design

Due to the dire situation prevailed in the country, we are compelled to follow a convenient sampling technique to capture the data using an e-survey. A Google questionnaire was attached to the web site of the Department of Labour that can be answered by any company who wished to recruit new staff in 2022. A random sample of 3500 private companies were selected and emailed a request letter to them with necessary links of the survey. Descriptive data analysis was used. To present the understanding of data analysis, the results represented using necessary graphs; tables and charts were derived using Microsoft Excel.

1.5 : Survey Questionnaire

A questionnaire was used as the survey tool. It was consisted with two main sections;

1. The nature of the business and current employment level.
2. The expected number of persons for 2022 by sex and educational qualifications.

The International Standard Industry Classification (ISIC) Rev 4 and International Standard Classification of Occupation -2008 were used to classify the nature of business and occupations of the employed persons for data analysis purposes.

1.6 : Propaganda Work

To build awareness of this survey within the private sector, many actions were taken. Namely, all main chambers, federations, group of companies were informed about this survey. Official social media were utilized and paper advertisements were published on all three languages in main business papers as well as daily papers. A running recurring news item about the e-survey was shown in main television channels. All District Secretaries were informed about this survey to pass on this message to Divisional Secretariats to make the grass root level companies to aware of this survey.

1.7 : Survey Period

It was decided to conduct the survey for 2 months: 1st of July 2021 to 31st of August 2021. The survey was adversely affected by the third wave of Covid in the country, which was unexpectedly worsened by August, with drastic increase in the number of Covid infections and deaths. Due to the unexpected situation, it was continued up to September 2021.

CHAPTER 2

Employment Profile

2.1 : Overview of Establishments

Despite the limitations, lockdowns, and uncertainties of the country, we have received information from 480 establishments to the survey.

As the number of responses was inadequate to give the estimates for the whole private sector, the data evaluation was based on the received sample.

The 44 percent of responded establishments were situated in Colombo district and 14 percent and 11.3 percent located in Ratnapura and Gampaha districts respectively. Out of the total companies Kaluthara, Kurunagala and Nuwara-eliya districts represent 5.6 percent, 5.6 percent and 5.4 percent respectively (Fig 1).

Out of the total companies responded 45 percent were reported labour demand in various categories to fulfil their targets in 2022. When observed by sectors, the highest need of employees was reported in Industry sector as 57 present and least demand was recorded for Agri-plantations as 11.5 percent.

The labour demand of large companies that belong to employed category of 'More than 100' recorded the highest need of employees for the year 2022 as 63.4 percent while medium size companies with 26-100 employees reported average of 36.3 percent.

Fig 2.1 **:** Percentage Distribution of all Responded Establishments by Districts

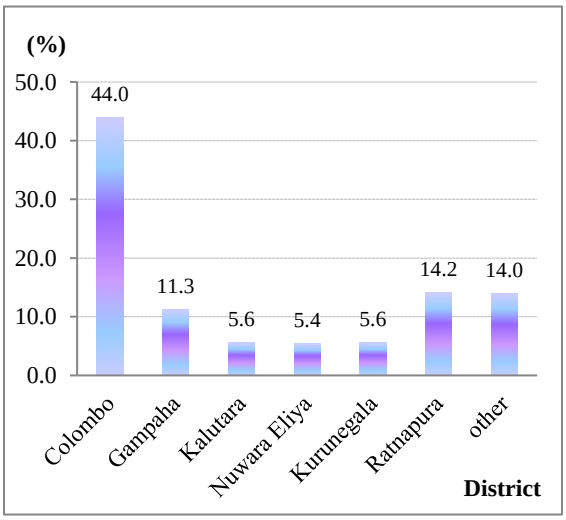


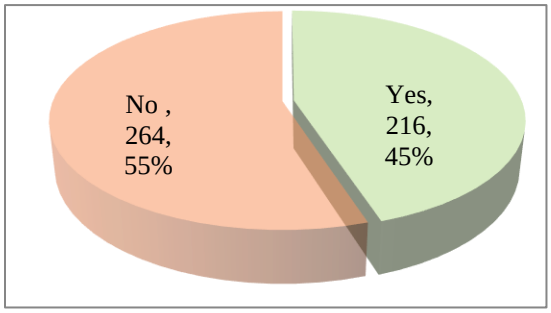
Table 2.1: Characteristics of Establishments with Labour Demand for 2022

Item	(%)
Major Industry group Belonged	
Agriculture	11.5
Industry	57.0
Services	35.6
Current Employment category	
Less than 5	9.5
5-25	28.7
26-50	36.2
51-100	36.5
More than 100	63.4

2.2 : Distribution of Employment by District, Sector and Current Employment Status

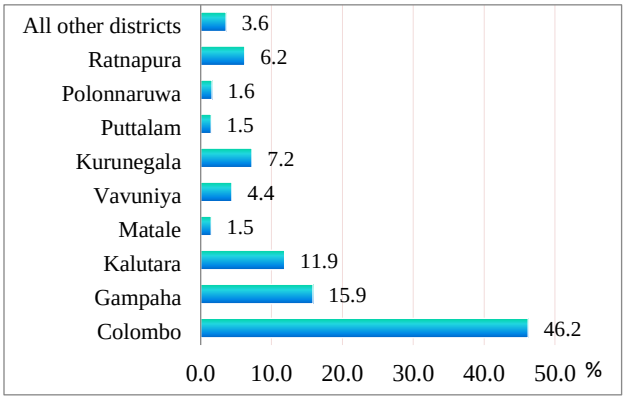
The total establishments responded for this survey is 480 and out of that 216 (45%) has reported that they need new employees to achieve their planned targets in year 2022 (Figure 2.2).

Fig 2:2 Labour Demand of the Establishments - 2022



The total employment opportunities they will create for 2022 are 51,615. The district distribution of the reported employees, economic activities they belong to, the occupation categories they needed for, the sex distribution and education preferences are discussed in this section.

Figure 2.3: Percentage Distribution of Labour Demand in Districts



Colombo district reports the highest demand of employees of 46.2 percent, followed by Gampaha and Kaluthara districts by almost 16 percent and 12 percent respectively. Therefor the Western province contained three fourth of the reported employment for year 2022 (Fig 2.3).

One of the main observations in this study is the high demand of female employees for the year 2022. The sex composition of employment needed is 33 to 66 percent of males to females.

The highest numbers of female employees are requested from Matale, Kurunagala and Polonnaruwa districts. Insignificant amount has reported 'sex undefined' in few districts.

Industry sector reported the highest labour demand of 77 percent for the year 2022 and out of that, three fourth consist of female employees (Table 2.2). The requirement of services sector for 2022 is 23 percent. The male to female ratio of the employees needed in service sector remains almost 1:1. The Agriculture sector almost consisted with plantation companies, reported a negligible amount of employee requirement.

The size of the companies greatly influenced the labour demand of 2022. The large companies have demanded more employees for year 2022. These larger companies accounted for nearly 98 percent of the total labour demand. The request of female employment is 69.5 percent, (Table:2.2).

Table 2.2: Labour Requirement for 2022 by District, Economic Sector and Current Employment Level

Item	Total		Sex	
	Number	Percentage ((%)	Male (%)	Female (%)
District				
Colombo	23,859	46.2	31.0	65.2
Gampaha	8,184	15.9	30.6	69.4
Kalutara	6,117	11.9	38.5	60.5
Matale	772	1.5	1.9	98.1
Vavuniya	2,274	4.4	43.0	57.0
Kurunegala	3,738	7.2	8.6	91.1
Puttalam	772	1.5	35.8	64.2
Polonnaruwa	831	1.6	0.4	78.6
Ratnapura	3,211	6.2	41.1	42.0
All other districts	1,857	3.6	1.3	3.5
Sector				
Agriculture	147	0.3	32.0	68.0
Industries	39,618	76.8	26,1	73.9
Services	11,850	22.9	49.1	50.9
Current Employment				
<5	33	0.06	48.5	51.5
5-25	268	0.52	51.1	48.9
26-50	291	0.56	71.2	27.8
51-100	600	1.17	50.8	49.2
100<	50,423	97.69	30.5	69.5
Total	**51,615**	**100**	**31.9**	**68.1**

Figure 2.4: Labour requirement of 2022 by Size of the establishment

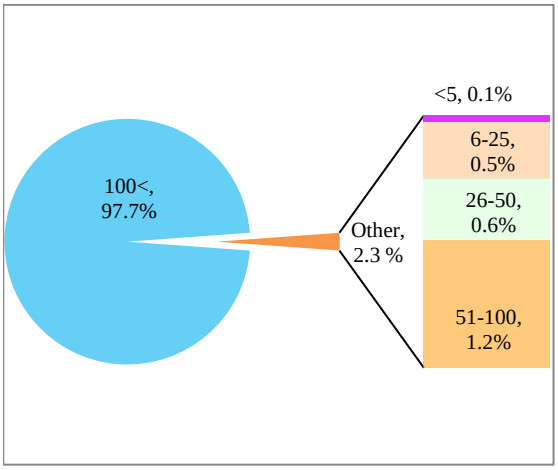
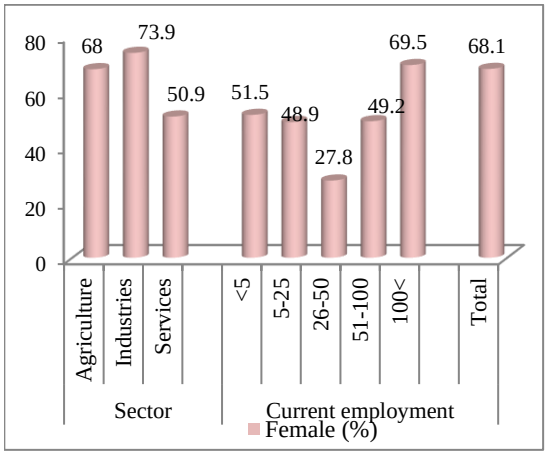


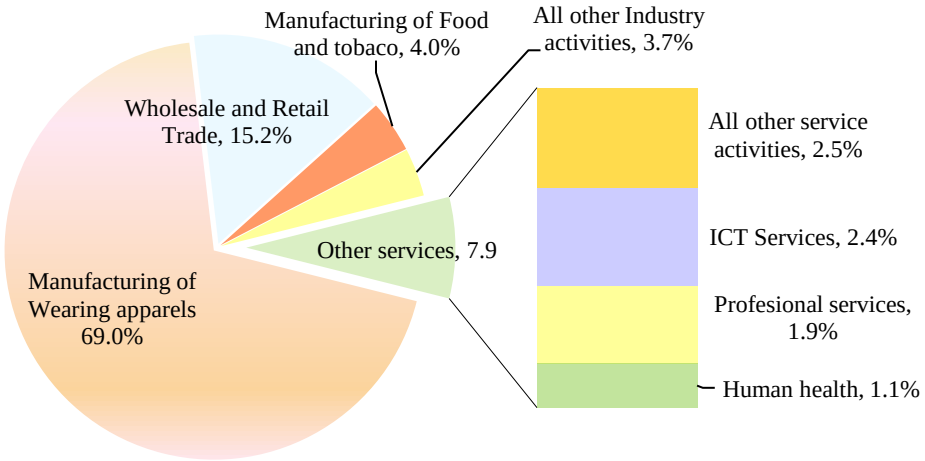
Figure 2.5: Female labour Preference by Sector and Size of the company



2.3 : Employment Distribution within Economic Activities – ISIC Rev. 4

International Standard Industry Classification Rev. 4 was used to classify the nature of businesses reported in this study. The employment requirements of economic activities for year 2022 are showing on figure 2.6. In this study, it is interesting to note that highest employment need of 69 percent reported for 'Wearing apparels', while 15.2 percent of employment requirements recorded for Wholesale and retail services. 'Manufacturing of food beverages and tobacco' industry needed 4.0 percent out of the reported requirement. One of the emerging service activities of the country, the 'ICT services' hope to deploy 2.4 percent of the requested employment. All 'Professional services' employment requirement is nearly 2% for the next year while 'Human health' services reported about 1 percent out of the total employment requirement.

Figure 2.6: Employment Requirement of Economic activities for year 2022



2.3.1 : Sex Preference in Economic Activities:

Vast sex disparities are observed in many industry activities. Mainly 'Food and Clothing' sectors need more females than male counterparts, while 'Rubber and plastics', 'Fabricated metal' industry, 'Construction' and many other industry activities prefer males over females, (Table 2.3). As the requirement of employees is very high in 'Garment sector', female employee preference is reported as three fourth compared to the preference of one fourth of males employees in 2022. Table 2.3 shows that Services sector requirement of 1:1 sex ratio of employees especially in 'Wholesale and Retail Trade', ICT sectors.

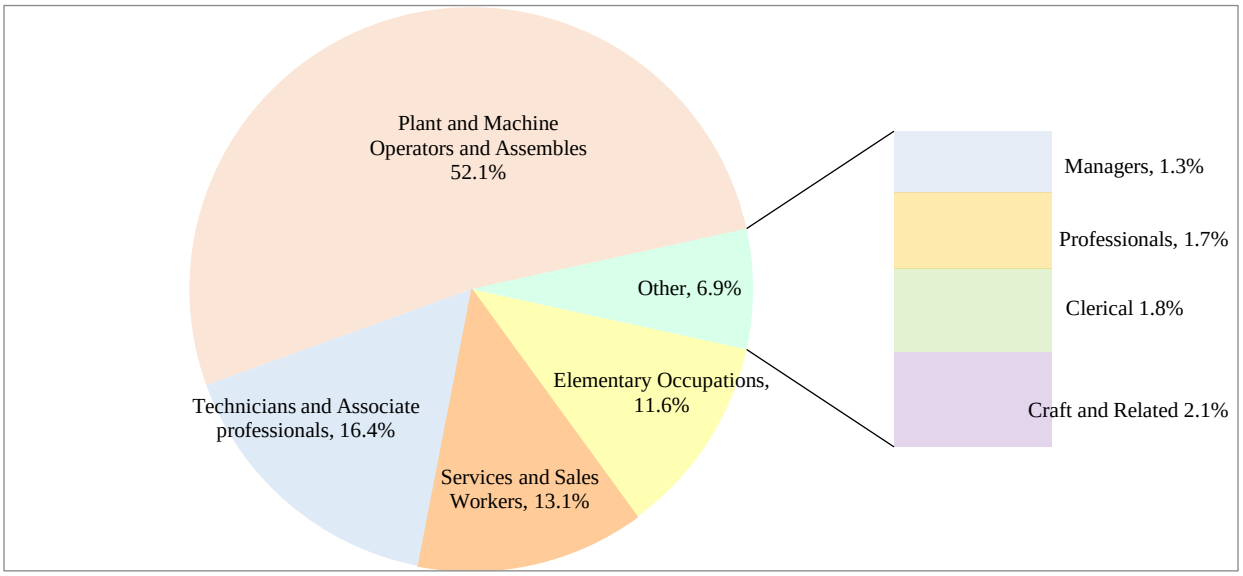
Table 2.3: Sex distribution of employment requirement for year 2022 by Economic Activity

Sector	Total	Male (%)	Female (%)
Agriculture			
Plantations	147	32.0	68.0
Industry			
Manufacturing of food and tobacco	2,077	11.0	89.0
Manufacturing of textile, wearing apparel and leather products	35,623	24.7	75.3
Manufacturing of rubber and plastic	376	68.1	31.9
Manufacturing of non-metallic mineral production	440	51.8	48.2
Manufacturing of fabricated metal	254	100.0	0.0
Construction	110	86.4	13.6
All other Industry activities	738	65.7	34.3
Industry Total	**39,618**	**26.1**	**73.9**
Trade and Services			
Wholesale and Retail Trade	7,831	47.8	52.2
Accommodation	357	77.6	22.4
Computer Programing and Information Services	1,219	49.3	50.7
Professionals services	979	60.9	39.1
Admin and support services activities	477	67.9	32.1
Human health	554	5.8	94.2
All other services activities	433	57.7	42.3
Trade and Services Total	**11,850**	**49.1**	**50.9**
Grand Total	**51,615**	**31.9**	**68.1**

2.4 : Distribution of Employment within Occupational Categories: ISCO – 2008

Establishments were asked to fill the occupations needed for them to achieve their targets in 2022. These occupations were categorized using International Standard Classification of Occupation-2008. There are 9 occupational categories from Managers to Elementary occupations. The employment need of sixth category which includes farmers was not included here as this survey is based on establishments only. The figure 2.7 shows the demand in each category of occupation required for the year 2022. Half of the occupations belonged to 'Plant and machine operators and assembles', where most of the machine operators belonged in the apparel sector. 'Technicians and associated professionals' reported 16.4 percent of the requirement trailing by 'Service and sales workers' 13.1 percent. The demand for the 'Elementary occupations' recorded as around 12 percent (Figure 2.7).

Figure 2.7 : Employment Requirement Of Year 2022 By ISCO -2008 Classification



2.4.1 : Sex preference in Occupation Categories - 2022

Most of the ISCO categories do not show bias preference in sex. Very high female preference of 85.2 percent recorded for 'Plant and machinery operators and assemble' for the next year by establishments. The machine operators in the apparel sector mostly needed the female employees is the main reason for this high female preference in this category (Table 2.4). Contrastingly, 'Elementary occupations' recorded the least preference for females of 38.3 percent compared to 61.7 percent males. All other occupation categories reported approximately 1:1 ratio of male: female employees.

Table 2.4: Sex Distribution of Employment requirement for year 2022 by ISCO Categories

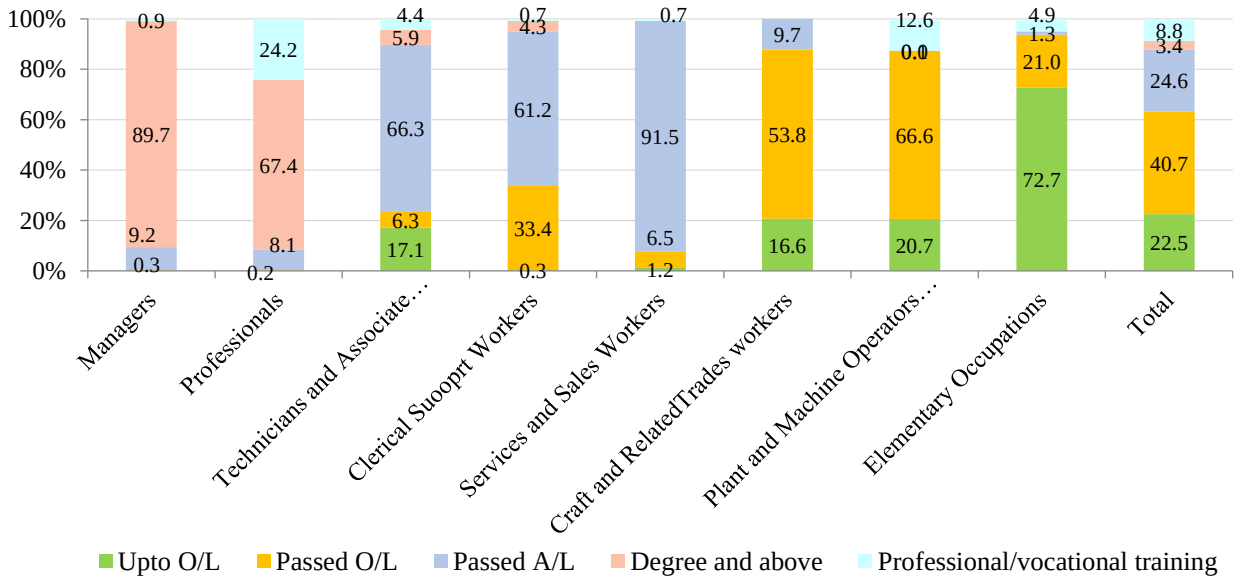
ISCO code	Male	Female	Total
Managers	46.9	53.2	688
Professionals	55.5	44.5	859
Technicians and Associate professionals	47.3	52.7	8,477
Clerical Support Workers	46.7	53.3	934
Services and Sales Workers	46.2	53.8	6,740
Craft and Related Trades workers	42.3	57.7	1,067
Plant and Machine Operators and Assembles	14.8	85.2	26,888
Elementary Occupations	61.7	38.3	5,962
Total	**31.9**	**68.1**	**51,615**

2.4.2 : Educational Preference in Occupation Categories - 2022

Table 2.5: Educational and Professional/Vocational training preferred by Occupation Category

Occupation Category	Up to O/L	Passed O/L	Passed A/L	Degree and above	Professional /vocational training	Total
Managers	-	0.3	9.2	89.7	0.9	688
Professionals	-	0.2	8.1	67.4	24.2	859
Technicians and Associate professionals	17.1	6.3	66.3	5.9	4.4	8,477
Clerical Support Workers	0.3	33.4	61.2	4.3	0.7	934
Services and Sales Workers	1.2	6.5	91.5	-	0.7	6,740
Craft and related trades workers	16.6	53.8	9.7	-	-	1,067
Plant and Machine Operators and Assembles	20.7	66.6	0.1	-	12.6	26,888
Elementary Occupations	72.7	21.0	1.3	-	4.9	5,962
Total	**22.5**	**40.7**	**24.6**	**3.4**	**8.8**	**51,615**

Figure 2.8 : Percentage distribution of educational /training preference in Occupational categories



In overall scenario of the country clearly shows that, 40.7 percent of the employees preferred 'Passed Ordinary Level' as the highest educational requirement for the jobs demanded in year 2022, trailed by 'Passed Advanced Level' by 24.6 percent. Approximately, 9 percent of total occupations preferred a professional /technical/ vocational or craft related training (Fig.2.8).

CHAPTER 3

Labour Demand

3.1 : High Demanded Occupations for 2022

The most demanded 30 occupations were listed in Table 3.1. Out of the top 30, more than 90 percent were gathered up to top 10. The Sewing Machine Operators acquired the highest demand.

Table 3.1: Top 30 High Demanded Occupations for 2022

No.	Occupation	Total	(%)
1	Sewing Machine Operators	22,964	46.52
2	Manufacturing Supervisors	5,700	11.55
3	Manufacturing Labourers NEC	5,201	10.54
4	Sales Workers NEC	2,072	4.20
5	Cashiers and Ticket Clerks	2,039	4.13
6	Stall and Market Salespersons	2,000	4.05
7	Weaving and Knitting Machine Operators	1,851	3.75
8	Stationary Plant and Machine Operations NEC	1,219	2.47
9	Commercial and Sales Representatives	1,035	2.10
10	Information and Communications Technology Operations Technicians	906	1.84
11	Butchers Fishmongers and Related Food Preparers	500	1.01
12	Finance Managers	403	0.82
13	Accounting and Book Keeping Clerks	344	0.70
14	Plastic Products Machine Operators	343	0.69
15	General Office Clerks	326	0.66
16	Cleaners and Helpers in Offices Hotels and Other Establishments	306	0.62
17	Hand Packers	302	0.61
18	Software Developers	266	0.54
19	Security Guards	253	0.51
20	Mechanical Engineering Technicians	168	0.34
21	Administrative and Executive Secretarials	156	0.32
22	Motorcycle Drivers	150	0.30
23	Nursing Professionals	132	0.27
24	Metal Processing Plant Operators	132	0.27
25	Agricultural and Industrial Machinery Mechanics and Repairers	126	0.26
26	Electrical Mechanics and Fitters	109	0.22
27	Credit and Loan Officers	108	0.22
28	Civil Engineers	87	0.18
29	Textile Leather and Related Pattern-makers and Cutters	86	0.17
30	Chefs	84	0.17
	Total	**49,368**	**100.00**

In manufacturing sector, the Supervisors and Labourers' altogether reported next highest demand of 22 percent of the occupations. Sales Workers, Cashiers and Ticket Clerks and Stall and Market Sales Persons altogether mostly related with trade activities acquired 12.3 percent of the labour demand for 2022. The need of ICT Operation Technicians has become significant and recorded as 1.8 percent of occupations according to the top 30 list for 2022.

3.2 : Top 10 Occupations Demanded within Economic Activities

To get the further insight into the labour demand reported for 2022, the top 10 occupations of mandatory economic activities are studied. These are the main economic activities which had highest employment demand recorded in this survey. Generally, labour need for 2022 is distributed among two sectors: Industry and Services. Out of the 26 plantations in Agriculture sector, responded for the survey, only 3 has reported labour need which is an insignificant amount. The labour demand of 'Textile Wearing Apparels and Leather Products', 'Food Beverages and Tobacco' are distinctly and three activities of 'Manufacture of Rubber and Plastics', 'Manufacture of non-Metallic Mineral products' and 'Manufacture of Fabricated Mineral Products' are studied together.

Table 3.2: Top 10 Labour Demand Occupations in Textile, Wearing Apparels and Leather Products

No.	Occupation	Demand (no.)	(%)
1	Sewing Machine Operators	22,934	65.00
2	Manufacturing Supervisors	5,505	15.60
3	Manufacturing Labourers NEC	4,449	12.61
4	Weaving and Knitting Machine Operators	1,811	5.13
5	Cleaners and Helpers in Offices , Hotels and Other Establishment	140	0.40
6	Administrative and Executive Secretaries	122	0.35
7	Mechanical Engineering Technicians	85	0.24
8	Industrial Machinery Mechanics and Repairers	84	0.24
9	Texttile , Leather and Related Pattern-Makers and Cutters	76	0.22
10	Genaral Officev Clerks	75	0.21
	Total	**35,281**	**100.00**

Table 3.2 indicates the 'Textile, Wearing Apparels and Leather products' activity, where the highest demand of 65 percent is recoded for Sewing machine operators. The next 15.6 percent is demanded for Manufacturing Supervisors, trailing with 12.6 percent of Manufacturing Labourers n.e.c. (not elsewhere classified), and 5.1 percent of Weaving and Knitting Machine Operators. These four jobs encountered for 98.3 percent of this economic activity.

Table 3.3: Top 10 Labour Demand Occupations in Food, Beverages and Tobacco Products

No.	Occupation	Demand (no)	(%)
1	Stationary Plant and Machine Operators n.e.c.	1,200	58.5
2	Butchers,Fishmongers and Related Food Preparers	500	24.3
3	Hand Launderers and Pressers	256	12.5
4	Manufacturing Supervisors	27	1.3
5	Manufacturing Labourers	15	0.7
6	Chefs	12	0.6
7	Crop Farm Labourers	12	0.6
8	Shop Sales Assistants	11	0.5
9	Metal Processing Plant Operators	10	0.5
10	Food and Related Product Machine Operators	10	0.5
	Total	**2,053**	**100.0**

Table 3.4: Top 10 Labour Demand Occupations in Manufacturing of Rubber And Plastic, non Metallic Mineral Products and Fabricated Metal Products

No.	Occupation	Demand (no.)	(%)
1	Manufacturing labourers n.e.c	424	42.6
2	Plastic products machine operators	318	32.0
3	Civil Engineers	66	6.6
4	Manufacturing supervisors	47	4.7
5	General office clerks	40	4.0
6	Administrative and executive secretaries	25	2.5
7	Accounting and book keeping clerks	25	2.5
8	Electrical mechanics and fitters	19	1.9
9	ICT Technology Operations Technicians	16	1.6
10	Mechanical engineering technicians	15	1.5
	Total	**995**	**100**

In the activity of Food, Beverages and Tobacco products, the highest labour demand of 58.5 percent is reported for 'Stationary Plant and Machine Operators n.e.c.'. The next 24.3 percent approximately required for 'Butchers, Fish-Mongers and related Food Preparers'. The other 17.3 percent has distributed almost similarly within the next eight occupation categories (Table 3.3). In Table 3.4, the two industry economic activities are amalgamated together, and it shows the 75 percent of the labour demand required for the year 2022 are composed with 'Manufacturing Labourers' n.e.c and Machine Operators in the Manufacturing of Plastic Products. The need of Civil Engineers in these economic activities is reported as 6.6 percent. Table 3.5 indicates the top 10 occupations of Trade services, and the occupations of 'sales Workers' n.e.c., 'Cashiers and Ticket Clerks' and 'Stall and Market Sales Persons has recorded on the top with almost equal demand for 2022. 'Commercial and Sales Representatives' acquired the next demanded occupation (7.8 percent) for 2022 in Trade services.

Table 3.5: Top 10 Labour Demand Occupations in Trade Services

No.	Occupation	Demand (no.)	(%)
1	Sales workers n.e.c.	2,072	27.7
2	Cashiers and Ticket Clerks	2,012	26.9
3	Stall and Market Salespersons	2,000	26.8
4	Commercial and Sales Representatives	585	7.8
5	Accounting and book keeping clerks	300	4.0
6	General office clerks	170	2.3
7	Scooter Orderly	150	2.0
8	Manufacturing Supervisors	70	0.9
9	Bakers, Pastry-cooks and confectionery makers	60	0.8
10	Stock clerks	54	0.7
	Total	**7,473**	**100**

High demanded occupations for 2022 in Computer programming and ICT services is given in Table 3.6. Nearly 80 percent of them encountered with ICT Operations Technicians (67.2 percent) and Software Developers (20.6 percent). More than 50 percent of labour demand in 'Office Administration and Support Services (Table 3.7) required for 'Security Guards' in the next year. The next 24.6 percent accounted for Clerk posts. When look at the high demanded occupations in Health sector for 2022 (Table 3.8), almost 60 percent covered with 'Nursing Professionals', 'Commercial and Sales Representatives' and 'Medical Equipment Technicians' by 28.8 percent, 18.2 percent and 11 percent respectively. The demand of 'Medical Doctors' is recorded as 4.5 percent.

Table 3.6: Top 10 Labour Demanded Occupations in Computer Programming and ICT Services

No.	Occupation	Demand (no.)	(%)
1	ICT Operation Technicians	813	67.2
2	Software developers	249	20.6
3	Sales and Marketing Managers	69	5.7
4	Policy planning Managers	20	1.7
5	Software Engineers	20	1.7
6	Manager Operations	15	1.2
7	Project Engineer	10	0.8
8	Database designers and administrators	6	0.5
9	Information Technology Trainers	5	0.4
10	Accountants	2	0.2
	Total	**1,209**	**100**

Table3.7: Top 10 Labour Demand Occupations in Office Administration and Supportive Services

No.	Occupation	Demand (no.)	(%)
1	Security Guards	240	52.2
2	Related clerks	62	13.5
3	Coding, Proof-reading and related clerks	51	11.1
4	Shop Sales Assistants	40	8.7
5	General office clerks	31	6.7
6	Construction managers	10	2.2
7	Health care assistants	9	2.0
8	Physical and Engineering Science Technicians n.e.c.	8	1.7
9	Cleaning and house- keeping supervisors	5	1.1
10	Chefs	4	0.9
	Total	**460**	**100**

Table 3.8: Top 10 Labour Demand Occupations in Health Services

No.	Occupation	Demand (No.)	(%)
1	Nursing Professionals	128	28.8
2	Commercial and sales representatives	81	18.2
3	Medical imaging and therapeutic equipment technicians	49	11.0
4	Health professionals n.e.c.	44	9.9
5	Cleaning and house- keeping supervisors	40	9.0
6	Receptionists (General)	38	8.6
7	Medical Doctors	20	4.5
8	Pharmacists	20	4.5
9	Accounting associate professionals	13	2.9
10	Chemical and physical science technicians	11	2.5
	Total	**444**	**100**

3.3 : Changing Patterns in Labour Demand

In this section the changing patterns in the main occupations are studied. The occupations that appeared commonly in top 30 lists of all three surveys i.e., 2017 Labour Demand Survey, 2020 Working hours and Labour Cost and the survey of Labour requirement in private sector establishments for -2022 were selected for this study. There were 10 common occupations in the high demanded occupation lists of 30, as reported by the private sector companies in the respective years (Table 3.9). Therefore, these changing patterns of these occupations may shape up the future economy of the country. These 10 occupations selected were namely; 'Sewing Machine operators', 'Manufacturing supervisors', 'Manufacturing labourers n.e.c', 'Security Guards', 'Commercial and sales representatives', 'General office clerks', 'Cashiers and ticket clerks', 'Stall and Market Salespersons', 'Cleaners and Helpers in Offices, Hotels and Other Establishments', 'Hand Packers'.

Table 3.9: Comparison of the Labour Demand in 2017, 2020 and 2022 for Occupations Selected

No.	Occupations	2017 (%)	2020 (%)	2022 (%)
1	Sewing Machine Operators	30.5	29.6	57.2
2	Manufacturing Supervisors	3.5	3.1	14.2
3	Manufacturing labourers n.e.c.	15.6	9.8	13.0
4	Cashiers and Ticket Clerks	3.2	2.8	5.1
5	Stall and Market Salespersons	3.3	3.6	5.0
6	Commercial and Sales Representatives	7.8	2.9	2.6
7	General office Clerks	3.4	1.6	0.8
8	Cleaners and Helpers in Offices, Hotels and Other Establishments	7.3	15.1	0.8
9	Hand Packers	2.9	3.8	0.7
10	Security Guards	22.5	27.7	0.6
	Total	**100.0**	**100.0**	**100.0**

Figure 3.1: Changing Demand of Sewing Machine Operators - 2017, 2020, 2022

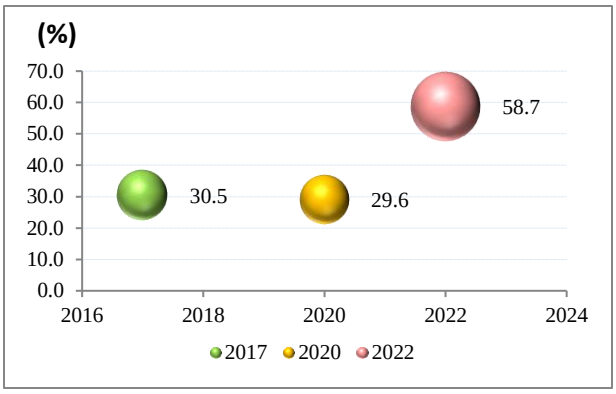


Figure 3.2: Changing Demand of Manufacturing Supervisors - 2017, 2020, 2022

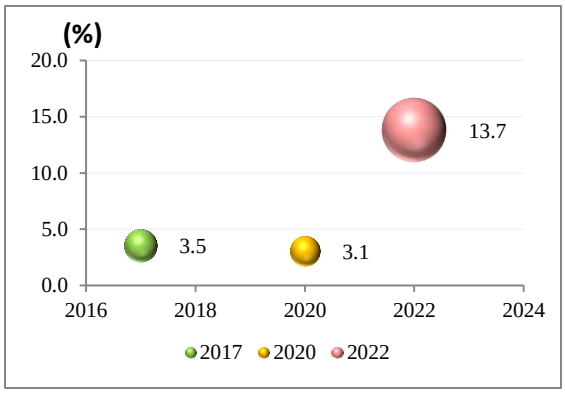


Figure 3.3: Changing demand of manufacturing labourers n.e.c. - 2017, 2020, 2022

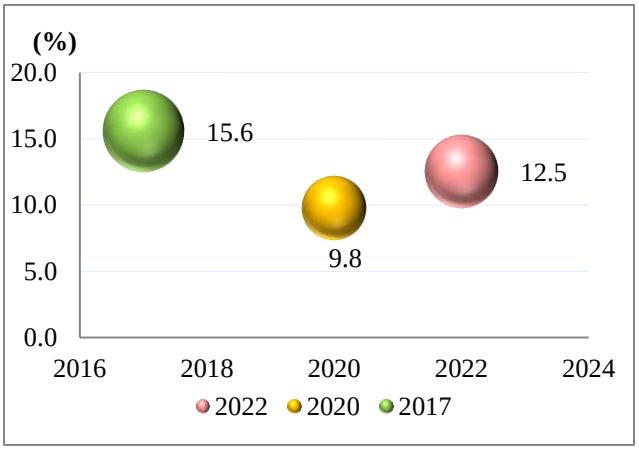


Figure 3.4: Changing demand of Cashiers and Ticket Clerks - 2017, 2020, 2022

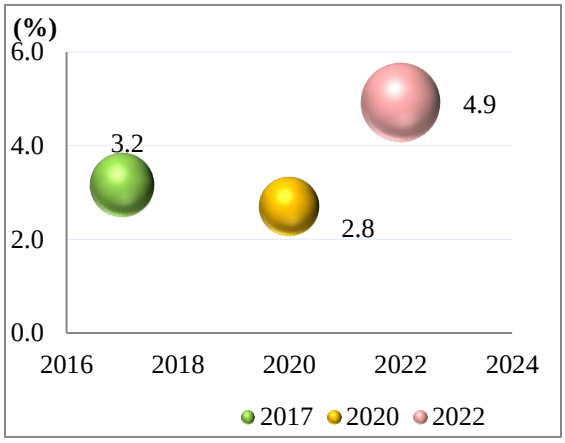


Figure 3.5 Changing Demand of Stall and Market and Salespersons – 2017, 2020, 2022

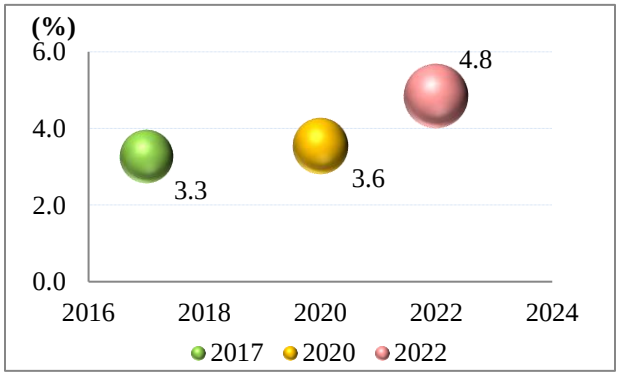
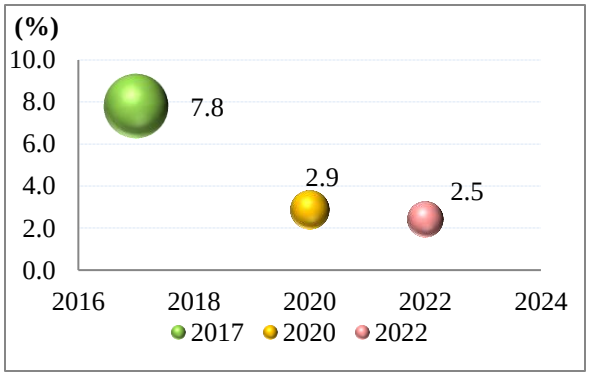


Figure 3.6: Changing Demand of, Commercial Sales Representatives – 2017, 2020, 2022



The figures 3.1 and 3.2 clearly show that demand of 'Sewing Machine Operators' and 'Manufacturing Supervisors' for year 2022 has increased extensively compared to 2017 and 2020. The demand of 'Cashiers and Ticket Clerks' and Stall and Market Salespersons (Figure 3.4 & 3.5) shows an upward trend during the period while the demand of 'Commercial and Sales Representatives' (Figure 3.6) shows a clear downward trend.

Figure 3.7: Changing Demand of General office Clerks - 2017, 2020, 2022

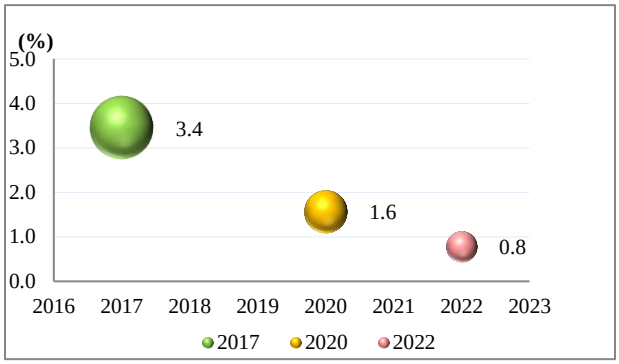
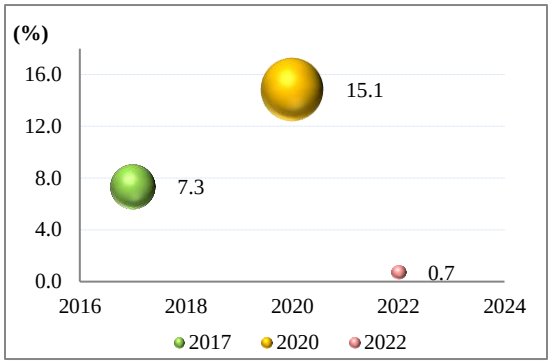


Figure 3.8: Changing Demand of, Cleaners and Helpers - 2017, 2020, 2022



The demand of 'General Office Clerks' has gradual decrease towards 2022. The both occupational groups of 'Cleaners and Helpers' and 'Hand Packers' reported a huge drop of demand in 2022 compared to the 2017 and 2020, (Fig 3.8 and 3.9). The demand of Security Guards (Figure 3.10) also reported a downward pattern within this period and low demand for the year 2022.

Figure 3.9: Changing Demand of Hand Packers -2017, 2020, 2022

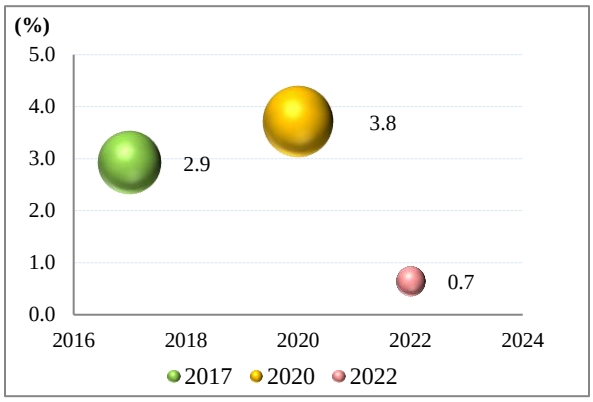
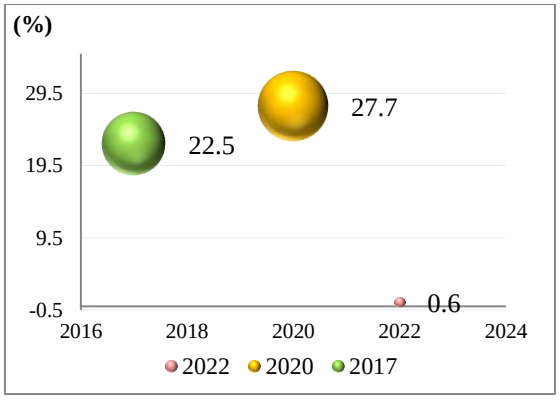


Figure 3.10 Changing Demand of Security guards -2017, 2020, 2022



CHAPTER 4

Discussion and Conclusion

4.1 : Discussion

The Covid 19 plague that instigated in latter part of 2019, blow-out rapidly around the world and caused devastating effects on the lives of the entire world population. The lockdowns and travel restrictions that have been imposed by many countries have shattered the labour markets across the world. Compared to the fourth quarter of 2019, in year 2020 equivalent of 225 million jobs has been wiped out globally due to losses of employment and working hours reported by International Labour Organization. ILO further recorded that job lost in Asia pacific is about 81 million (ILO Press release 15.12.2020).

Sri Lanka, too, has been a victim of this catastrophe since March 2020. Even with strict closures and travel restrictions imposed by the government to save the people from this plague, the country suffered with three severe covid waves. Therefore, similar to other countries, it was observed the reduction in both quantity and quality of employment in the country. Department of Census and Statistics recorded 1.8 percent reduction in employment within the period between the fourth quarters of 2019 and 2020(LFSQ4 2019, 2020 DCS). This decrease is mainly due to contraction in industry and services sectors which include the private sector as a whole. This level of shrinkage is clearly reflected in gross value added of the industry sector in 2020 which reported a heavy contraction of 4.5 percent. The service sector also reported a slight expansion of 2.1 percent within the year. Therefore, overall GDP reported as a contraction of 3.1 percent and per capita GDP has reduced by 4.1 percent in year 2020 compared to 2019 (National Accounts Estimates 2020, DCS).

In 2021 Sri Lanka government has taken various actions to uplift the shattered economy of the country. Accelerate the vaccination programs particularly to protect the people in working-age. The strict rules prevailed on mobility were lifted and allowed the manufacturing sector to work especially the export-oriented companies to produce goods for exports to promote the inflow of foreign currency. By these actions, it is expected to have a robust economic recovery. Central Bank of Sri Lanka also emphasized in the Annual report of 2020 that it's mandatory to reform the labour market in Sri Lanka urgently to create a dynamic labour force that can contribute to the country's transition to a high-income economy. The positive impacts of these actions can be observed in the gradual increases of volume of industrial production in the country

by first and second quarters of 2021 as Index of Industrial Production (IIP) is reported as 10 percent and 28. 2 percent in IIP Q1 and IIP Q2 respectively when compared to the same quarter in 2020. (IIP Q2 (2020), IIP Q2 (2021), DCS Considering these background facts, the Department of Labour decided to look forward to contribute to increase the productivity of the private sector, for the betterment of the country with the aim of re-strengthening the Sri Lanka economy that unprecedentedly affected by the Covid 19 epidemic.

This survey is carried out amidst severe economic impacts initiated by the COVID-19 pandemic. There are more than 80,000 private sector companies in Sri Lanka, but nearly 1 percent of the companies was able think about the future optimistically and has responded to the survey of 'Employment need of year 2022'. These are almost large export-oriented companies having more than 100 employees to date. The devastating impacts of the Covid 19 epidemic has severely affected on small and medium enterprises. Many establishments compelled to close down or restricted the employees to a lower limit. Establishments in service sector that were mainly adapted to work from home have survived. Therefore, we believe the unprecedented situation prevailed in the country along with these reasons mentioned has caused such a low response rate of the private sector. Therefore, we could not give inferences to the total private sector, but these results definitely indicate the basic needs and the changing scenario of the employment need of the private sector in the future.

Out of the 480 companies responded, nearly 50 percent recorded the requirement of 51,615 new employees for year 2022. The three-quarter of the employment accounts for the Western province. Led by Colombo district, where the most are situated, accounted for nearly half (46.2 percent) of the total labor demand reported. The remarkable feature is the high demand for female labour which shows the overall sex composition of the labour demand for 2022 as 66 females to 33 males.

Despite the closed down of manufacturing sector establishments recorded at the 1st phase of survey of 'Covid 19 and beyond' carried out in 2020 after the first wave of Covid 19 in Sri Lanka, when considering the labour demand for 2022, almost 77 percent of employment requested for Industry sector where all manufacturing companies are included. Little more than 20 percent were requested by the service sector and minor was requested by agriculture sector. Agriculture sector consisted with private plantation companies and out of the 23 companies responded for the survey only 3 companies reported labour need. Generally, the agriculture sector was the least affected sector by Covid pandemic. Out of the total jobs needed in industry sector, 'Manufacturing of textile, wearing apparels and leather products' accounted

for 90 percent. This would give an indication of the labour need of the country in the recent future. According to the responses of the companies, the preference in the education of employees for the year 2022 clearly indicates an important fact.

More than 50 percent of employment for 2022 consisted with 'Plant and machinery operators and assemblers' which were mainly belong to the manufacturing activities and basically focused on export productions of the country. When consider the educational qualifications, two third of them needed qualified the ordinary level exam (O/L) and one fifth of them even satisfied with education up to O/L standard. But comparatively with other occupation categories, 12.6 percent preferred having vocational training for the employees in this category. If there are proper plans to absorb and give useful vocational training for school dropouts with minimal education qualifications, it would be beneficiary for both the country and the young population. When look at the educational preferences of higher occupation categories for year 2022, even though the lesser amount needed for 'Managers' and 'Professionals', they preferred graduates with high education qualifications for nearly 90 percent and 70 percent of the 'Managerial' categories and 'Professionals' categories respectively. Further around 24 percent professionals need to have professional qualifications related to the job.

The high demanded jobs for 2022 that acquired the top 30 ranks out of the reported at this survey revealed very interesting facts on the way forward of the Sri Lankan economy. The need of 'Sewing machine Operators' are on the top and account for approximately 50 percent of the total job requirement. The Manufacturing supervisors and labourers are also accounted for more than 20 percent of the next year needs. The occupations related to "Whole sale and Retail Trade' encompassed with almost 10 percent of the total job requirement. The changing behavioral patterns of the country's economy can be observed in these results.

The newly emerging trend on ICT industry is vibrant with that 'ICT Operation Technicians' have gained the 10th rank and 'Data base designers and administrators gained 18th rank in the top 30 list. The fast development in e- trading is also noticeable with the job requirement of 'Motor Cycle drivers' has come up to 22nd rank. These new jobs were not included in top 30 lists of labour demand of 2017 and 2020. In past years 2nd rank of the top 30 lists was obtained by the 'Security Guards' which has been pushed backward to the 19th place in 2022. Due to the Covid pandemic, the working pattern has changed from working in the office to working from home, leaving those offices related jobs to the bottom of the priority list. Mainly, the security services, cleaners and helpers, and general clerk services show less demand for 2022, compared to the previous labour demand patterns.

4.2 : Conclusion

1. The prevailing high demand for 'Sewing machine operators' will be continuing up to 2022.
2. The labour demand of the economic activities for 2022 are led by primarily the 'Manufacture of Textiles, Wearing Apparels and Leather products', accompany with 'Wholesale and retail trade', 'Manufacture of Food Beverages and Tobacco' and Computer programming and ICT services
3. In the future, ICT related jobs and e- marketing related jobs will be given high priority.
4. The level of education is not a barrier to employing young workers in the export industry.
5. The demand for female workers will increase significantly in the near future.

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05. Survey to Assess the Covid 19 & Beyond –The impact on the Labour Market of Sri Lanka

    SURVEY REPORT OF THE E-SURVEY CONDUCTED ON PRIVATE SECTOR ESTABLISHMENTS – May 2020 A. Wimalaeeera, Department of Labour, Sri Lanka.

APPENDIX

Table 1: Total Number of Vacancies

No	Occupation	No of Vacancies
1	Sewing Machine Operators	22964
2	Manufacturing Supervisors	5700
3	Manufacturing Labourers NEC	5201
4	Sales Workers NEC	2072
5	Cashiers and Ticket Clerks	2039
6	Stall and Market Salespersons	2000
7	Weaving and Knitting Machine Operators	1851
8	Stationary Plant and Machine Operations NEC	1219
9	Commercial and Sales Representatives	1035
10	Information and Communications Technology Operations Technicians	906
11	Butchers,Fishmongers and Related Food Preparers	500
12	Finance Managers	403
13	Accounting and Book Keeping Clerks	344
14	Plastic Products Machine Operators	343
15	General Office Clerks	326
16	Cleaners and Helpers in Offices, Hotels, and Other Establishments	306
17	Hand Packers	302
18	Software Developers	266
19	Security Guards	253
20	Mechanical Engineering Technicians	168
21	Administrative and Executive Secretarials	156
22	Motorcycle Drivers	150
23	Nursing Professionals	132
24	Metal Processing Plant Operators	132
25	Agricultural and Industrial Machinery Mechanics and Repairers	126
26	Electrical Mechanics and Fitters	109
27	Credit and Loan Officers	108
28	Civil Engineers	87
29	Textile Leather and Related Pattern-makers and Cutters	86
30	Chefs	84
31	Sales and Marketing Managers	81
32	Cleaning and Housekeeping Supervisors in Offices, Hotels and Other Establishments	81
33	Stock Clerks	69

Table 1: Total Number of Vacancies - Cont.

No	Occupation	No of Vacancies
34	Shop Sales Assistants	65
35	Bakers, Pastry-cooks and Confectionery Makers	62
36	Manufacturing Managers	61
37	Product and Garment Designers	60
38	Packing, Bottling and Labeling Machine Operators	58
39	Office Supervisors	57
40	Hand Launderers and Pressers	57
41	Welders and Flame Cutters	52
42	Coding and Proof-Reading and Related Clerks	51
43	Sewers, Embroiders and Related Workers	51
44	Insurance Representatives	50
45	Fibre Preparing, Spinning and Winding Machine Operators	50
46	Bleaching, Dying and Fabric Cleaning Maachine	50
47	Medical Imaging and Therapeutic Equipment Technicians	49
48	Waiters	49
49	Electrical Engineering Technicians	47
50	Receptionists(General)	46
51	Messengers, Package Delivers and Luggage Porters	45
52	Supply, Distribution and Related Managers	44
53	Health Professionals NEC	44
54	Financial And Insurance Services Branch Managers	40
55	Cartographers and Surveyors	40
56	Chemical Engineering Technicians	40
57	Accounting Associate Professionals	37
58	Hotel Receptionists	31
59	Pharmacists	30
60	Cooks	29
61	Heavy Truck and Bus Drivers	28
62	Industrial and Production Engineers	26
63	Pharamaceutical Technicians and Assistants	25
64	Sewing Machine Operators	24
65	Telecommunications Engineers	23
66	Typists and Word Processing Operators	22
67	Bartenders	22

Table 1: Total Number of Vacancies - Cont.

No	Occupation	No of Vacancies
68	Information and Communications Technology User Support Technicians	21
69	Generalist Medical Practitioners	20
70	Bank Tellers and Related Clerks	20
71	Physical and Engineering Science Technicians NEC	19
72	Electronic Engineers	18
73	Draughtspersons	18
74	Travel Attendants and Travel Stewards	17
75	Research And Development Managers	16
76	Lawyers	15
77	Motor Vehicle Mechanics and Repairers	15
78	Tailors ,Dressmakers, Furriers and Hatters	15
79	University and Higher Education Teachers	14
80	Car, Taxi and Van Drivers	14
81	Chemical and Physical Science Technicians	13
82	Secretaries(General)	13
83	Health Care Assistants	13
84	Crop Farm Labourers	12
85	Construction Managers	11
86	Mechanicals Engineers	10
87	Vocational Education Teachers	10
88	Food and Related Products Machine Operators	10
89	Mechanical Machinery Assemblers	10
90	Metal, Rubber and Plastic Products Assemblers	10
91	Domestic Cleaners and Helpers	10
92	Accountants	8
93	Construction Supervisors	8
94	Fur and Leather Preparing Machine Operations	8
95	Kitchen Helpers	8
96	Electrical Engineers	7
97	Building Architects	7
98	Teaching Professionals NEC	7
99	Data Entry Clerks	7
100	Child Care Workers	7
101	Tea Pluckers	7

Table 1: Total Number of Vacancies - Cont.

No	Occupation	No of Vacancies
102	Database Designers and Administrators	6
103	Ambulance Workers	6
104	Carpenters and Joiners	6
105	Vehicle Cleaners	6
106	Secondary education Teachers	5
107	Information Technology Trainers	5
108	Civil Engineering Technicians	5
109	Building and Related Electricians	5
110	Other Professional Services Manager	4
111	Environmental and Occupational Health and Hygiene Professionals	4
112	Building Caretakers	4
113	Painters and Related Workers	4
114	Building Construction	4
115	Biologists ,Botanists, Zoologists and Related Professionals	3
116	Dental Assistants and Therapists	3
117	Service Station Attendants	3
118	Concrete Placers, Concrete Finishers and Related Workers	3
119	Masons	3
120	Sheet-Metal Workers	3
121	Metal working Machine Tool Setters and Operations	3
122	Cooperate Managers	2
123	Advertising and Public Relations Managers	2
124	Dentists	2
125	Physiotherapists	2
126	Dieticians and Nutritionists	2
127	Financial and Investment Advisors	2
128	Advertising and Marketing Professionals	2
129	Information and Communications Technology (ICT) Sales Professionals	2
130	Electronic Engineering Technicians	2
131	Medical Records and Health Information Technicians	2
132	Telephone Switchboard Operators	2
133	Library Clerks	2
134	Shop Supervisors	2
135	Agricultural Farm Supervisors	2

Table 1: Total Number of Vacancies - Cont.

No	Occupation	No of Vacancies
136	Air Conditioning and Refrigeration Mechanics	2
137	Well Drillers and Borers and Related Workers	2
138	Chemical Products Plant and Machine Operations	2
139	Lifting Truck Operators	2
140	Garden and Horticultural Labourers	2
141	Transport Labourers	2
142	Life Science Technicians (Excluding Medical)	1
143	Other Government Associate Professionals	1
144	Transport Clerks	1
145	Plumbers and Pipe Fitters	1
146	Cement, Stone and Other Minerals Products Machine Operators	1
147	Wood Processing Plant Operations	1
148	Steam Engine and Boiler Operators	1
149	Bus Drivers	1
	Total	**51,615**

Labour Demand Survey 2022 - Questionnaire

Identify the Labour demand required for the private sector in the year 2022 with the aim of achieving higher productivity for the betterment of the country

We look forward to contribute to increase the productivity of the private sector, for the betterment of the country with the aim of re-strengthening the Sri Lanka economy which has been severely affected by the Covid 19 epidemic.
Accordingly, it is intended to inspect and observe the labor demand of the private sector companies to meet their expected targets for the year 2022.
To achieve this, data is collected through the short Google Form given below.
Hence, I kindly request you to fill this form accurately and share with us before 31st July 2021.
We assure you that the data collected herein will only be used for future planning of the country and will not be used for any legal purpose and your confidentiality will be fully protected.
For further inquiries;

Phone No: 0112368055
Email Address: labourst@sltnet.lk

departmentoflabour.yt@gmail.com Switch accounts

The name and photo associated with your Google Account will be recorded when you upload files and submit this form. Your email address is not part of your response.

Next

Clear form

1. Basic information about the institution

(1) Name of the Institution *

Your answer

(2) Address *

Your answer

(3) Administrative District *

Choose

(4) The nature of your organization or business: (briefly mention the main product with highest number of workers / labors / performance or business) ** Write your answer clearly and concisely. For example, tea cultivation, poultry farming for eggs, quarry, yoghurt production, bakery production, apparel production, tile production, housing construction, highway construction, retail trade, private passenger transport, insurance services, real estate activities, beauty salon, accounting services, etc. *

Your answer

2. Information about the job requirements of the organization

(5) What is the total number of employees currently employed in your organization? (Including all permanent, temporary, casual and contract basis) *

- ◯ Less than 5
- ◯ 5-25
- ◯ 26-50
- ◯ 51-100
- ◯ More than 100

(6) Do you expect to recruit more employees to achieve the targets of production in the year 2022 in your organization? *

- ◯ Yes
- ◯ No

2. Information about the job requirements of the organization

(6) Do you expect to recruit more employees to achieve the targets of production in the year 2022 in your organization? (Yes)

(7) If the answer to question (6) is yes, then fill and upload the file by using add file option. (https://drive.google.com/file/d/111ehPOFHMyKAqBuyo_lK2gQBZX0nxChZ/view?usp=sharing) *

Add File

2. Information about the job requirements of the organization

(8) If your company is registered under the Employees Provident Fund, please enter the registration Number in the given box

Your answer

(9) Telephone Number *

Your answer

(10) Fax Number

Your answer

(11) Email *

Your answer

The information of the responsible officer

(12) Your name & position *

Your answer

(13) Your contact Number *

Your answer

Back Submit Clear form

ISBN 978-624-6096-01-4