

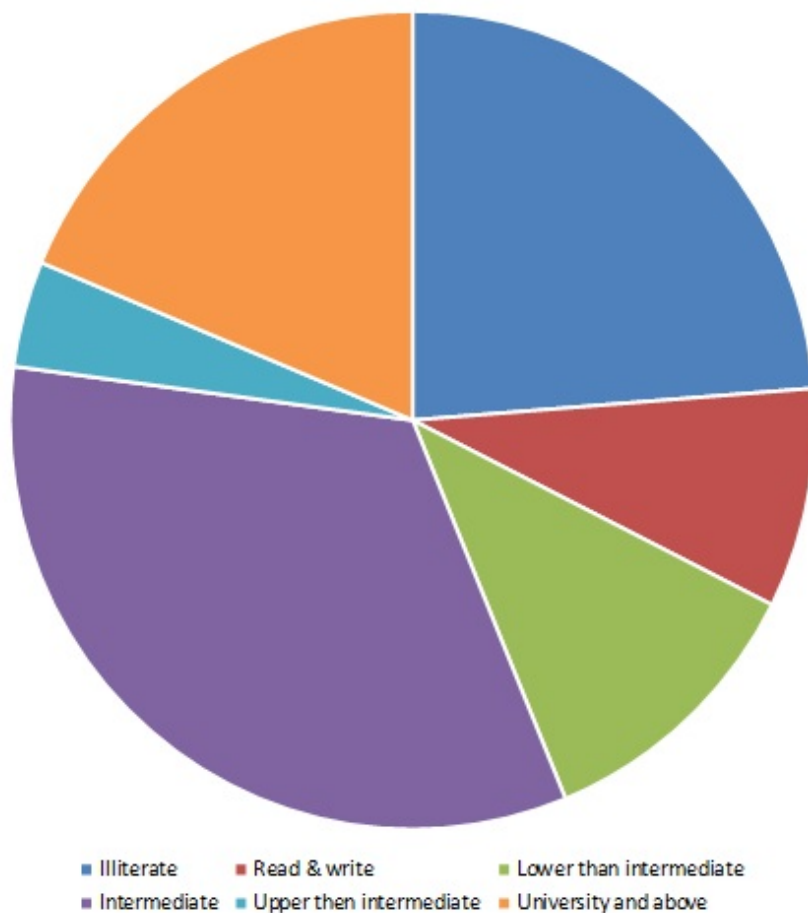
Estimates of the Egyptian labor force

Labor force est. in 2017: 29.6 Million

Labor force historical size and growth:

year	Labor force	Growth (annual)
2006	23206000	4.99%
2007	24250000	4.50%
2008	24652000	1.66%
2009	25353000	2.84%
2010	26180000	3.26%
2011	26529000	1.33%
2012	27020500	1.85%
2013	27622500	2.23%

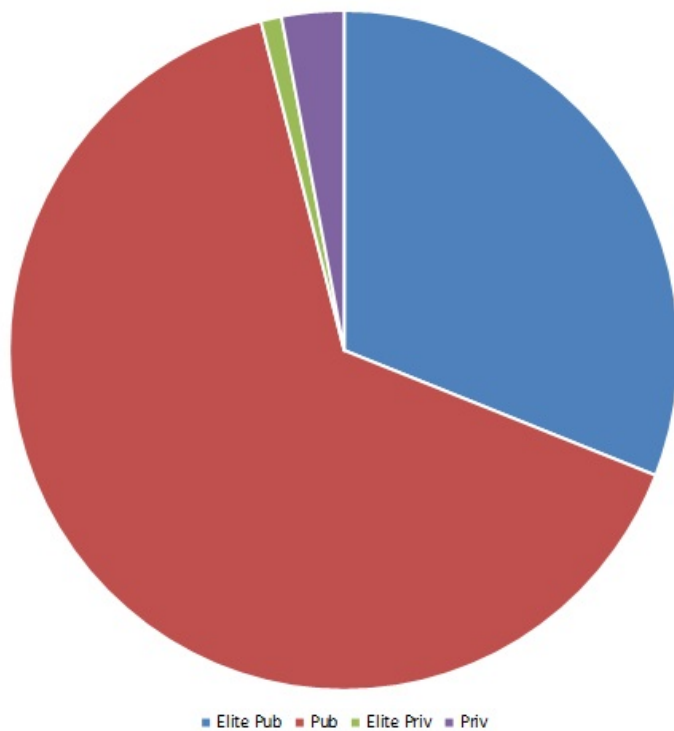
Segmentation can be first done by educational level. It can be a detrimental effect in job type.



Education level	Percentage
Illiterate	23.75%
Read & write	8.70%
Lower than intermediate	11.35%
Intermediate	33.30%
Upper than intermediate	4.19%
University and above	18.70%

University graduates:

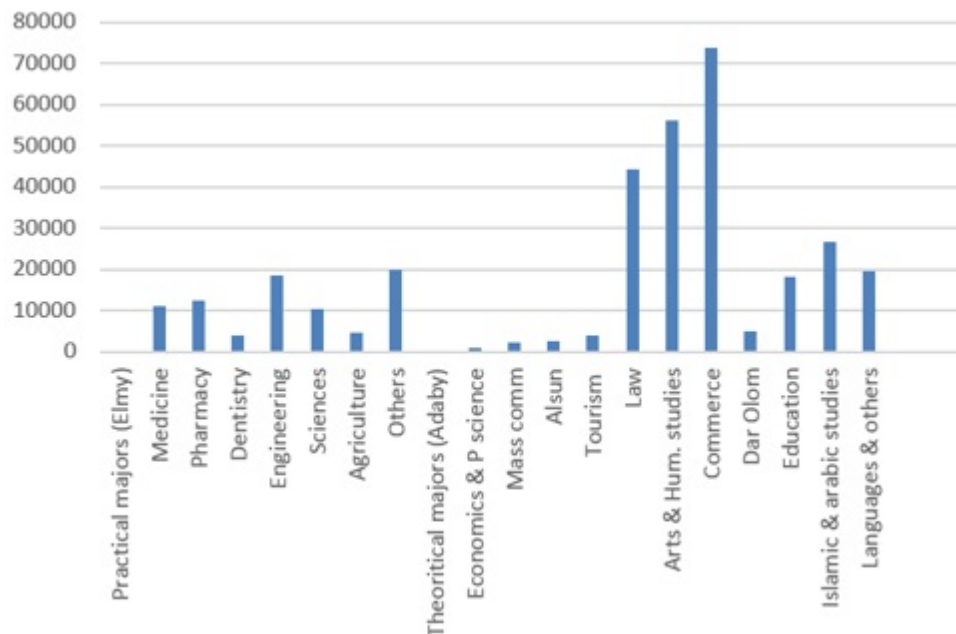
They can be categorized by the reputation of the university, for example some companies restrict a certain university, like the AUC or GUC, when it comes to certain positions. Elite public are the top public universities like Cairo, Ain Shams and Alex. Top private like AUC, GUC & BUE.



Type	Graduates (annual)	Percentage
Elite Public	102380	31%
Elite Private	2879	1%
Public	321809	65%
Private	9515	3%
Total	334203	

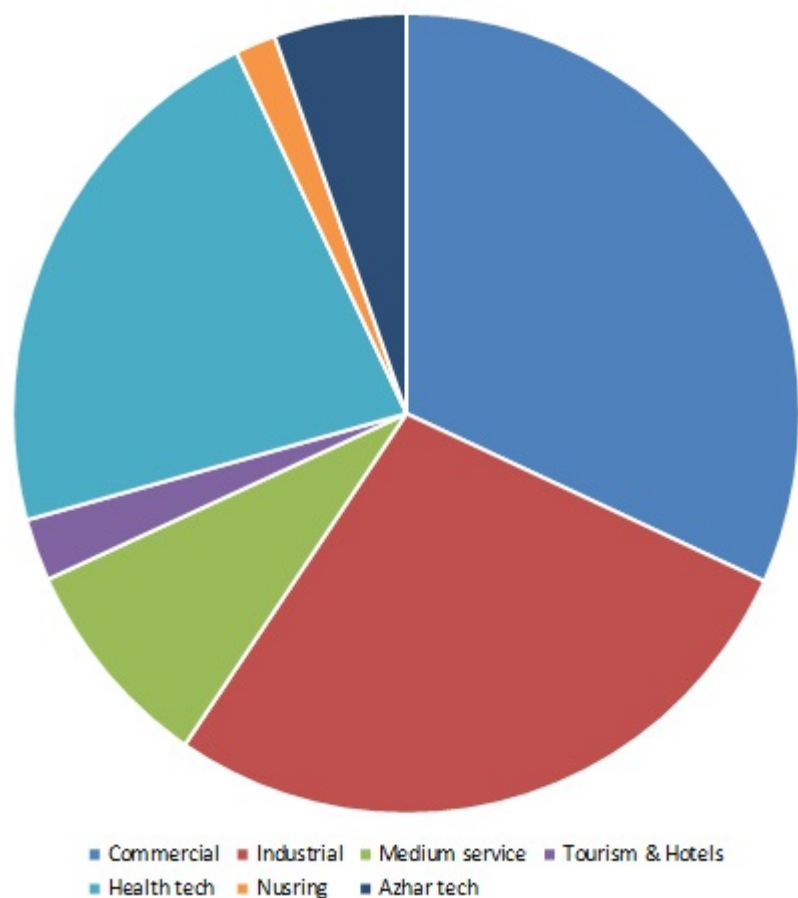
University graduates by Major:

Practical majors (Elmy)	numbers	Desirability
Medicine	10967	High
Pharmacy	12276	High
Dentistry	3828	High
Engineering	18534	High
Sciences	10500	Med
Agriculture	4745	Low
Others	19902	Low
Theoretical majors (Adaby)		
Economics & P science	817	High
Mass comm	2343	High
Alsun	2462	High
Tourism	3963	High
Law	44308	Med
Arts & Hum. studies	56111	Med
Commerce	73843	Med
Dar Olom	5101	Low
Education	18310	Low
Islamic & Arabic studies	26575	Low
Languages & others	19619	Low

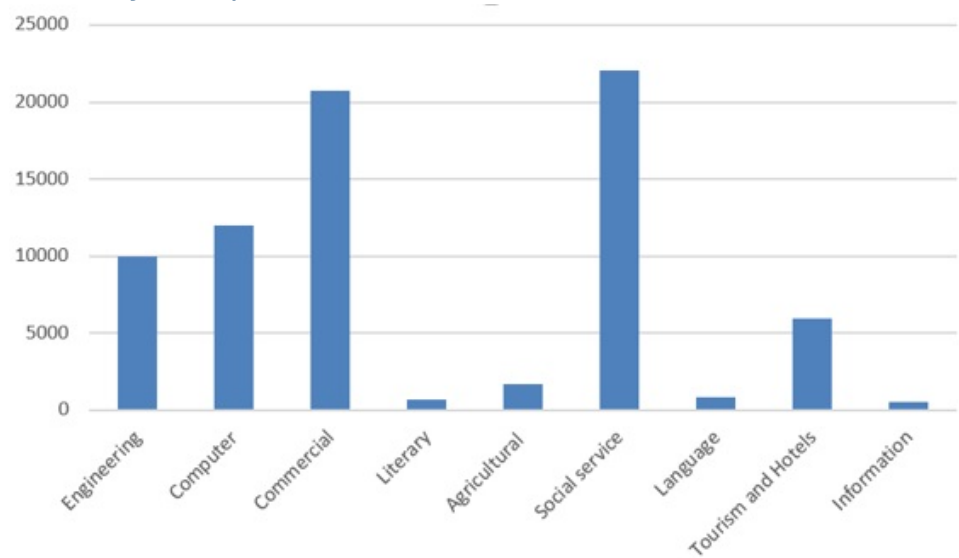


Number of vocational/technical institutes graduates:

Above intermediate by discipline:

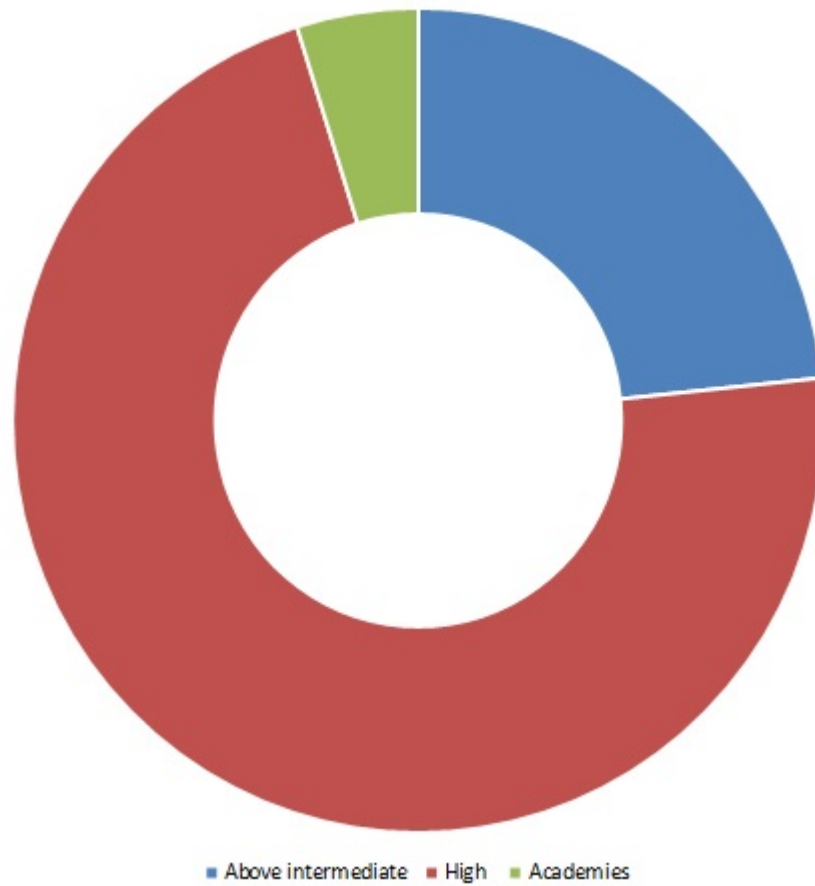


High institutes by discipline:



Institutes/Academy	graduates
Total Above intermediate Tech institutes	24249
Commercial	7761
Industrial	6729
Medium service	2118
Tourism & Hotels	612
Health tech	5399
Nursing	405
Azhar tech	1325
High tech institutes	74551
Engineering	10000
Computer	11966
Commercial	20763
Literary	670
Agricultural	1729
Social service	22051
Language	883
Tourism and Hotels	5930
Information	559
Academies	5018
Academy of arts	205
Police Academy	1554
Sadat Academy	706
AAST	2553
Total	207736

Graduate segmentation according to type of institutes: (Institutes and academies)



Companies:

Number of employees in Firm	Number of firms
1 to 9	4011200
10 to 50	107517
50+	16541
Total Firms	4135258

Year	New companies (excluding very small and micro)
2005/2006	3871
2006/2007	6048
2007/2008	7956
2008/2009	6292
2009/2010	7270
2010/2011	6209
2011/2012	7006
2012/2013	8945
2013/2014	8245
2014/2015	8403

total new jobs created (expansion and new firms)
77,130.45
120,507.61
158,524.89
125,369.36
144,856.20
170,150.26
147,134.84
233,035.83
167,492.00
155,292.30

The top job sites in Middle East and North Africa:

First there are many definitions for MENA, when used in the context of business in Egypt it often excludes Iran and is usually referring to Arab countries, having the same language and close cultural behaviors:

Algeria, Bahrain, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, United Arab Emirates, and Yemen. Excluding Iran and Turkey.

Second definition of top job sites:

Top sites ranking can be based on the following:

- Revenue
- Profits
- Customer monthly visits
- # of jobs posted

Both the number of customer visits and # of jobs posted are the main differentiators between those sites and they can have detrimental effect on both profits and revenue.

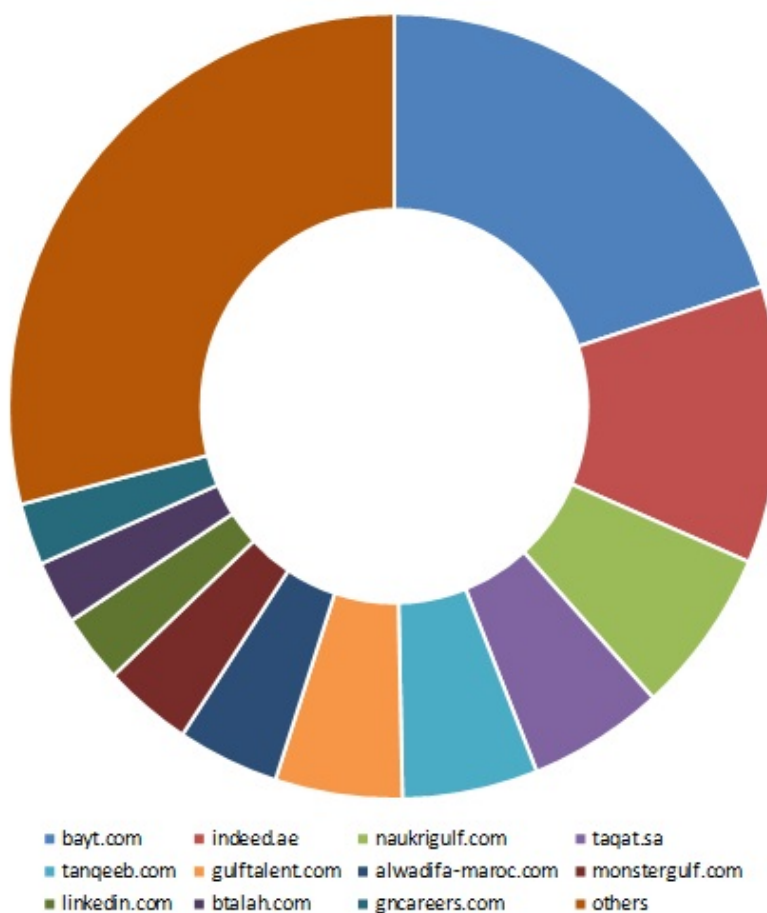
If a website has huge number of jobs posted while having small customer base, then this will have a detrimental effect on the sites revenues and desirability to attract companies to post their jobs in his website. On the other hand a website with low number of jobs and high customer visits can lead to future decrease in visits. However the number of visitors stays the biggest factor in determining the top job sites.

Notes:

- The data collected is the estimates for number of visits for the last 3 month of visits for each site.
- The number of jobs posted is for 1 month.
- Job sites definition means can mean any website that advertises jobs, it includes job boards, job forums and aggregators, or any site that employers use to advertise and seek candidates. For this assignment I used the first definition.
- For sites that are not totally dedicated to jobs, I used an estimate factor that estimates how much of the traffic on the site is dedicated to jobs section.
- For each site, traffic is multiplied by a factor determining how much of the traffic is generated from the region/country in question. For example indeed.com's traffic is multiplied by a factor of 0.006 determining the amount of traffic generated from Africa, when studying the top 5 jobsites in Africa.
- Data collected from Similarweb and Alexa.

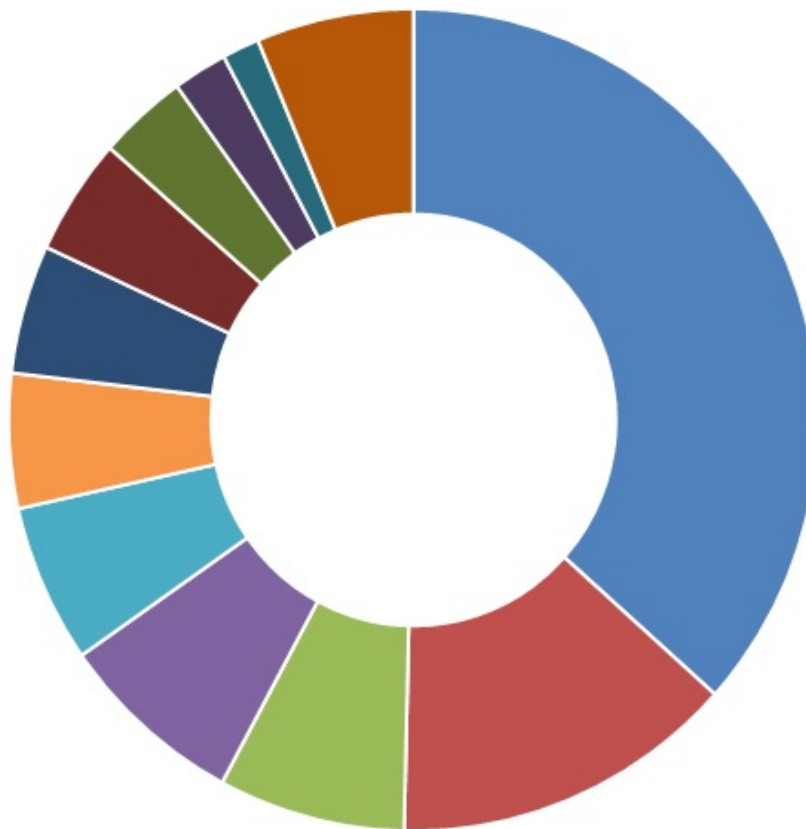
MENA top sites:

Site	3 month estimate	% traffic of job sites
Bayt.com	22220	20.1%
Indeed.ae	12630	11.4%
Naukrigulf.com	7557	6.8%
Taqat.sa	6292	5.7%
Tanqeeb.com	6285	5.7%
Gulftalent.com	5898	5.3%
Alwadifa-maroc.com	4772	4.3%
Monstergulf.com	4122	3.7%
Linkedin.com	3131	2.8%
Btalah.com	2905	2.6%
Gncareers.com	2818	2.5%
Others	32124	29%



UAE top sites:

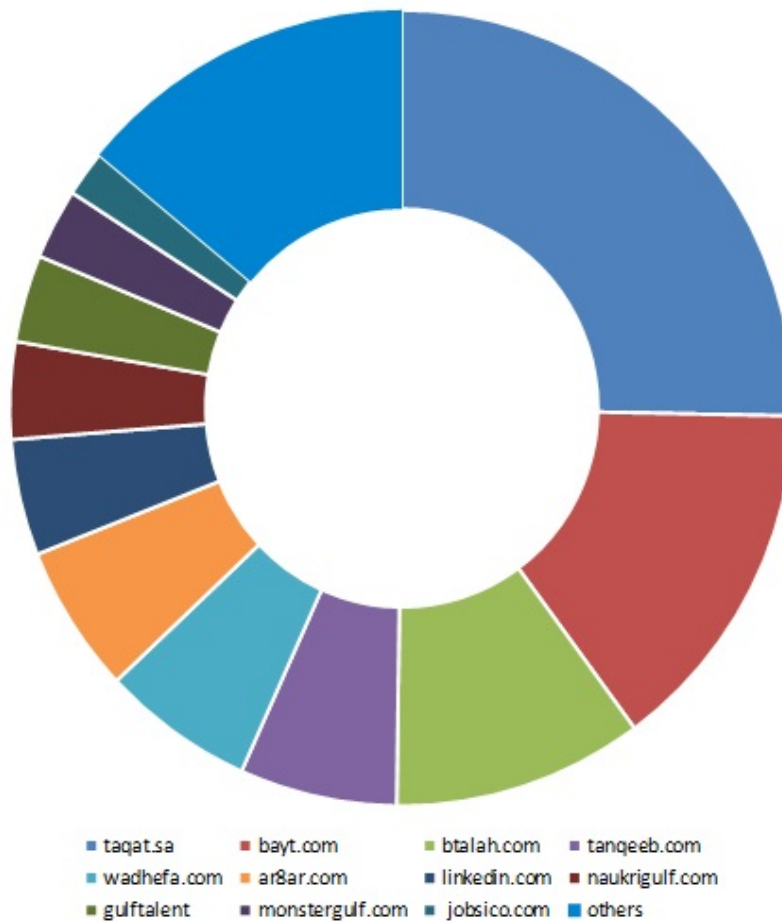
Site	Estimated 3 month traffic	% share
indeed.ae	7932	36.6%
bayt.com	2977	13.7%
gncareers.com	1618	7.5%
naukrigulf.com	1617	7.5%
Gulftalent.com	1351	6.2%
monstergulf.com	1146	5.3%
careerjet.ae	1098	5.1%
linkedin.com	996	4.6%
jobsara.com	772	3.6%
gulfre recruiter.com	471	2.2%
gulfjobseeker.com	322	1.5%
others	1360	6.3%



indeed.ae bayt.com gncareers.com naukrigulf.com
gulftalent monstergulf.com careerjet.ae linkedin.com
jobsara.com gulfre recruiter.com gulfjobseeker.com others

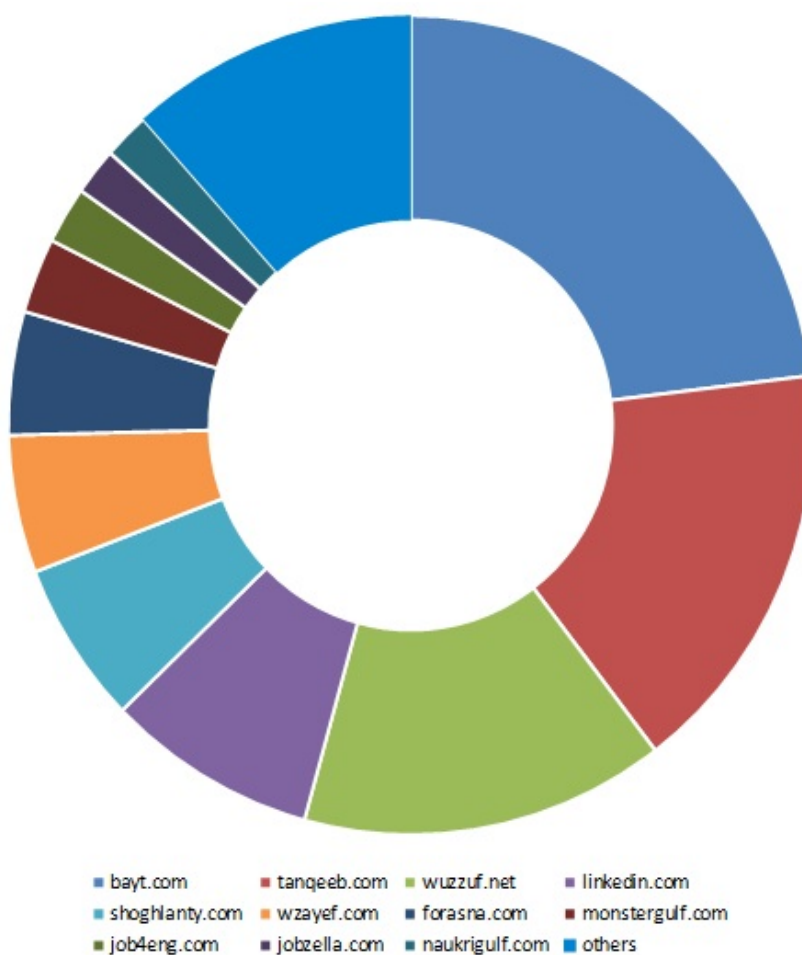
KSA top:

Site	Estimated 3 month traffic	% share
taqat.sa	6103	25.30%
bayt.com	3511	14.60%
btalah.com	2490	10.30%
tanqeeb.com	1565	6.50%
wadhefa.com	1511	6.30%
ar8ar.com	1455	6.00%
linkedin.com	1138	4.70%
naukrigulf.com	952	4.00%
gulftalent	855	3.50%
monstergulf.com	692	2.90%
jobsico.com	451	1.90%
others	3381	14.00%



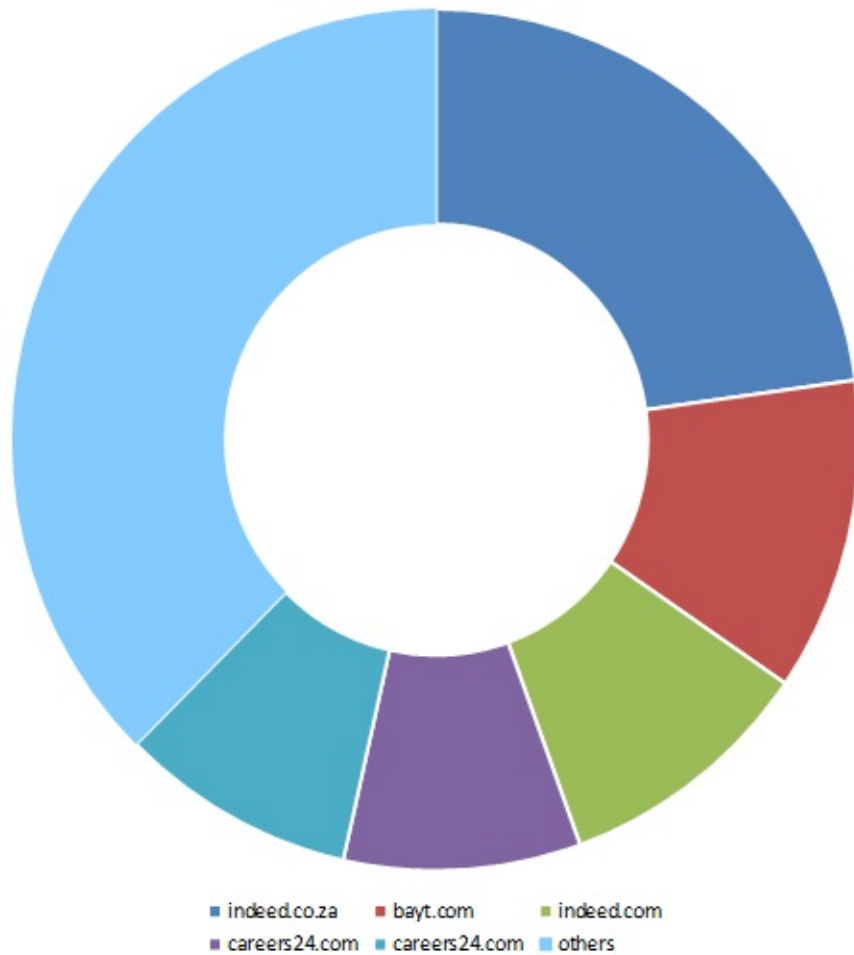
Top in Egypt:

Site	Estimated 3 month traffic	% share
tanqeeb.com	2501	16.50%
wuzzuf.net	2215	14.70%
linkedin.com	1280	8.50%
shoghlanty.com	973	6.40%
wzayef.com	822	5.40%
forasna.com	737	4.90%
monstergulf.com	449	3.00%
job4eng.com	341	2.30%
jobzella.com	283	1.90%
naukrigulf.com	280	1.80%
others	1751	11.60%



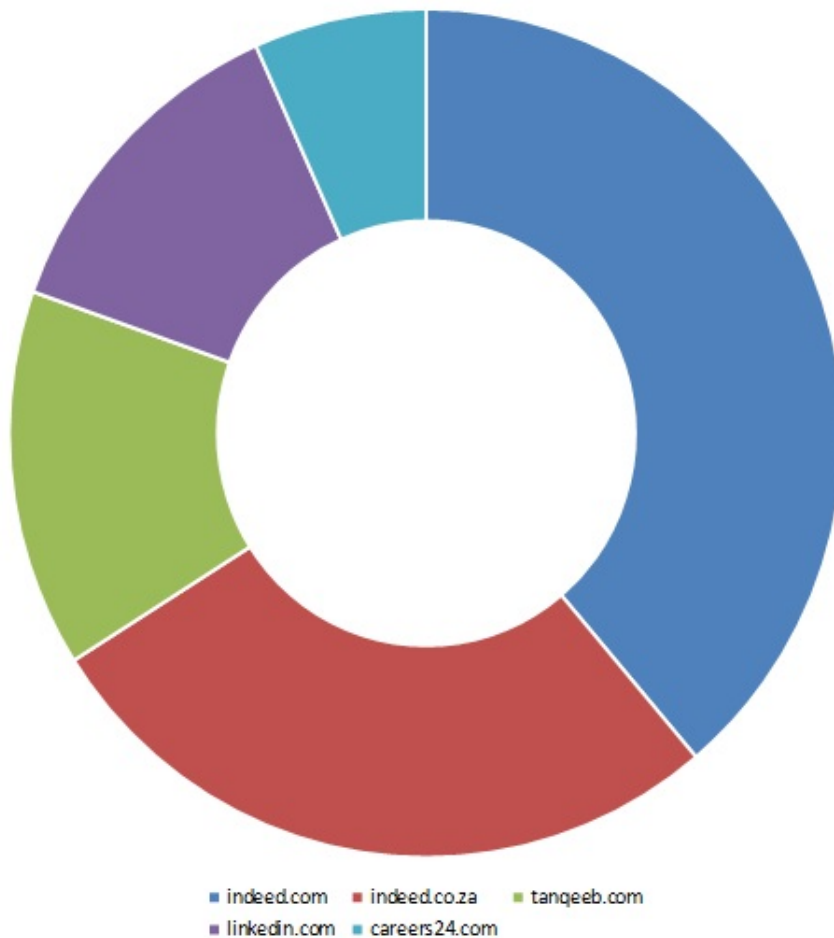
African top 5 sites in terms of visits:

indeed.co.za	11956	22.79%
bayt.com	6177.16	11.77%
indeed.com	5196	9.90%
careers24.com	4741	9.04%
careers24.com	4722	9.00%
others	19667.84	37.49%



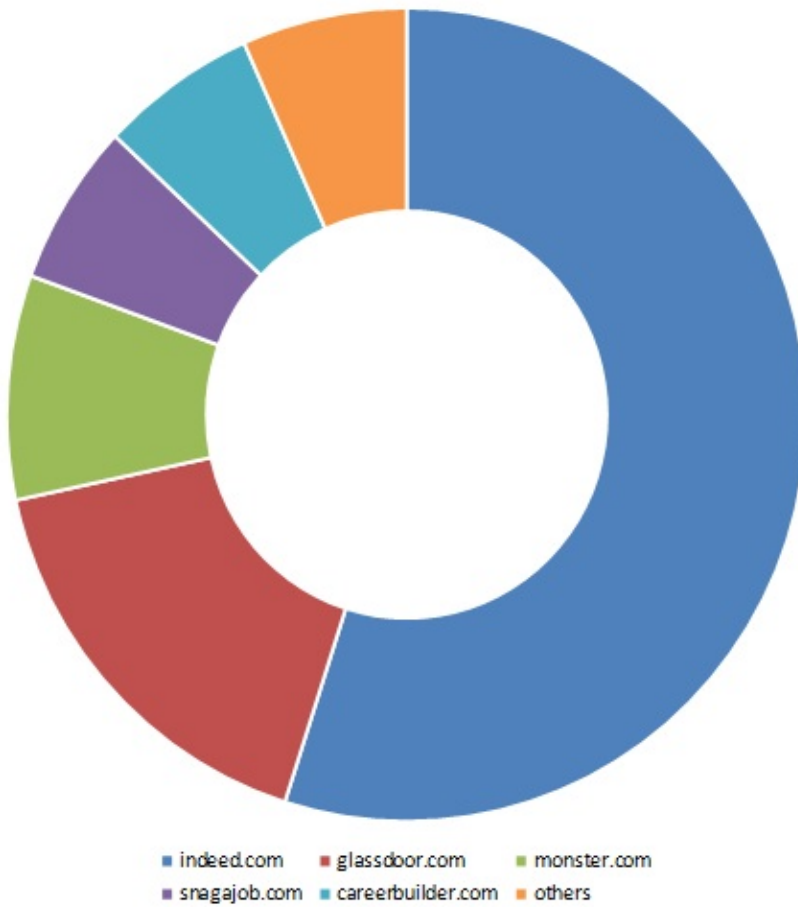
Africa top 5 by number of jobs available:

Site	Number of jobs posted (1 month)	% market share
indeed.com	108358	38.81%
indeed.co.za	75920	27.19%
tanqeeb.com	40200	14.40%
linkedin.com	36000	12.90%
careers24.com	18691	6.70%



USA top 5 sites:

Site	Visits	Share %
indeed.com	406154	55.7%
glassdoor.com	123424	16.9%
monster.com	65997	9.0%
snagajob.com	47696	6.5%
careerbuilder.com	46851	6.4%
others	49283	5.4%



Expansion

Factors affecting the choice of expansion:

- Political stability
- GDP per capita annual growth rate
- Rivalry between competition
- Job opportunities growth
- Labor market size and growth
- Internet penetration percentage
- How easy is it to enter the market? (including culture, experience,...etc)

I will exclude all regions/ countries that has a declining GDP growth rates, Especially those with high GDP and strong presence of competitors online as well as internet population growth rate is important in the choice as it indicates the growth of online sites and businesses capitalizing the growth expected from them.

This excludes **US, Australia & Western Europe.**

The **GCC countries** are currently witnessing a slow economic growth rate which will affect the job market. The internet users percentage from population is huge and the growth rate is not significant. The strong competition there. So this excludes GCC countries as well.

We are now mainly left with Africa, South America, South-east Asia.

I will exclude also South America due to slowing growth rate as well as cultural barrier and knowledge about the market by our current team members.

South-East Asia:

South-East Asia has shown the highest increase in GDP, as well as growth rate in internet users. However the barrier is cultural, where also language is diverse in each country and they don't use a unified language. Which makes it hard for outsiders, even big firms, to expand in those areas without huge investments. Local substitutes for large worldwide sites are favored in general.

I will exclude South-East Asia for those reasons.

North Africa and Sub-saharan Africa:

In Sub-saharan Africa, growth rate has declined from 4.5% in 2013 to only 3% in 2015 and expecting to decline further in 2016. However many Sub-saharan African markets are showing signs of extreme growth that compensates the other slowing countries.

Also the internet user base has shown significant growth in most of those area. They use English and French mainly in business sites.

Africa is diverse and needs further digging to decide which country to choose.

List of countries by GDP growth rate:

More than 6% GDP growth:	More than 4% GDP growth:
Ethiopia	Benin
DR Congo	Central African Republic
Cote d'Ivoire	Cameron
Mozambique	Uganda
Tanzania	Senegal
Rwanda	Mali
Kenya	Morocco
Djibouti	Namibia
	Nigeria

List of countries by GDP:

Country	GDP (Mil.)
Nigeria	481,066
South Africa	312,798
Algeria	166,839
Angola	102,643
Morocco	100,360
Sudan	84,067
Kenya	63,398
Ethiopia	61,537
Tanzania	44,895
Tunisia	43,015
Slovenia	42,747
Lithuania	41,244
Ghana	37,864

Top 10 African countries with internet users:

Country	Million internet users
Nigeria	97.2
Egypt	34.8
Kenya	31.9
South Africa	28.6
Morocco	20.2
Algeria	15
Uganda	11.9
Sudan	10.9
Ghana	7.9
Tanzania	7.6
Rwanda	3.2

Nigeria seems to be on top of the list and there's room for growth, however according to World Competitiveness Report highlights that Nigeria is ranked as one of the lowest competitive countries and have lots of obstacles for growth.

Global Competitiveness Report 2016-2017

Country	GCR Rank
Nigeria	127
Namibia	84
Kenya	96
South Africa	47
Morocco	70
Algeria	87
Uganda	113
Cote d'Ivoire	99
Ethiopia	109
Tanzania	116
Rwanda	52
Botswana	64