

**Palestinian National Authority
Palestinian Central Bureau of Statistics**

**Survey of the Perceptions of the Owners / Managers of
Industrial Establishments Regarding the Economic
Situation, November 2008**

Press Release on the Survey Results

December, 2008

PAGE NUMBERS OF ENGLISH TEXT ARE PRINTED IN SQUARE BRACKETS.
TABLES ARE PRINTED IN THE ARABIC ORDER (FROM RIGHT TO LEFT).



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Press Release

Main Findings of the Survey of the Perceptions of the Owners / Managers of Industrial Establishments Regarding the Economic Situation, November 2008

The following statement presents the basic findings of round 45th on the perceptions of the owners/managers of industrial establishments regarding the economic situation for November 2008. The round was conducted during the period December 3-23, 2008, using November 2008 as the reference month. The aim of the survey is to observe and monitor the trends of the opinions of the owners / managers of the industrial establishments. The sample size was 496 industrial establishments (343 in Remaining West Bank, 138 in Gaza Strip and 15 in Jerusalem J1). A two-stage sample was designed for this survey: in the first stage, the industrial survey 2004 was used as a sampling frame for the survey, while in the second stage all the industrial establishments, constituting approximately 70% of the total industrial production, were selected.

Performance of industrial establishments in November 2008 compared with October 2008

According to 25.0% of the owners/managers of the industrial establishments, the production performance of their establishments during November 2008 improved in comparison to October 2008 (7.7% for Gaza Strip and 29.7% for the West Bank).

10.6% reported an improved situation in obtaining needed raw materials and inputs during November 2008 (6.4% for Gaza Strip and 11.7 for the West Bank), while 18.8% reported that employee productivity increased compared with the previous month (9.0% for Gaza Strip and 21.3% for the West Bank).

According to the results, 16.6% of the owners/managers reported that their establishments' financial situation improved (7.7% for Gaza Strip and 18.9% for the West Bank), while 4.6% reported that banks loans were more accessible during November 2008 (1.3% for Gaza Strip and 5.5% for the West Bank) compared to the previous month..

Challenges

Drop in sales level

The perceptions of 89.5% the owners/managers of industrial establishments in Gaza Strip was that the main reason for the cutback or drop in sales level was due to the Israeli closure. At the same time, 19.3% of the owners/managers of industrial establishments in the West Bank indicated that the main reason was the decline in consumer purchasing power.

Local and external competition

In the Palestinian Territory, 88.9% of the owners/managers of the industrial establishments indicated that their establishments' main product faced local or external competition (68.4% for Gaza Strip and 91.7% for the West Bank).

According to 77.1% of the owners/managers of the industrial establishments in the Palestinian Territory, the main product faced local competition (88.5% for Gaza Strip and 76.0% for the West Bank); on the other hand, 22.9% of the owners/managers of the industrial establishments indicated that their main product faced external competition (24.0% for the West Bank, and 11.5% for Gaza Strip).

Employment

8.3% of the owners/managers of the industrial establishments in the Palestinian Territory laid off workers in November 2008 (10.5% for Gaza Strip and 8.0% for the West Bank); however, 85.6% of the owners/managers of the industrial establishments stated that there was no change in the number of workers, (86.6% for the West Bank and 79.0% for Gaza Strip).

Expectations

Short term

The expectations of the owners/managers of the industrial establishments in the short term, i.e., one month after the reference month (November 2008), show that 27.5% expected an improvement in their production in general in the Palestinian Territory.

The expectations of the owners/managers of the industrial establishments in the Palestinian Territory concerning employment were pessimistic since only 12.0% expected increases during December 2008.

The results showed that 27.5% of the owners/managers of the industrial establishments in the Palestinian Territory expected sales to increase during December 2008.

Medium term

The expectations of 44.9% of the owners/managers of the industrial establishments in the medium term (in the next six months) were optimistic since they expected an improvement in production in the Palestinian Territory (44.6% in the West Bank and 47.4% in Gaza Strip).

Concerning expectations for employment in the Palestinian Territory, 20.9% expected an increase in employment (42.1% in Gaza Strip and 18.0% in the West Bank).

Sales during the next six months will rise, according to the expectations of 45.6% of the owners / managers of the industrial establishments in the Palestinian Territory (47.4% in Gaza Strip and 45.3% in the West Bank).

Figure 1: Percentage of Industrial Establishment Owners / Managers who Encountered Improvement in Economic Conditions during November 2008 Compared to the Previous Month for the Main Indicators by Region

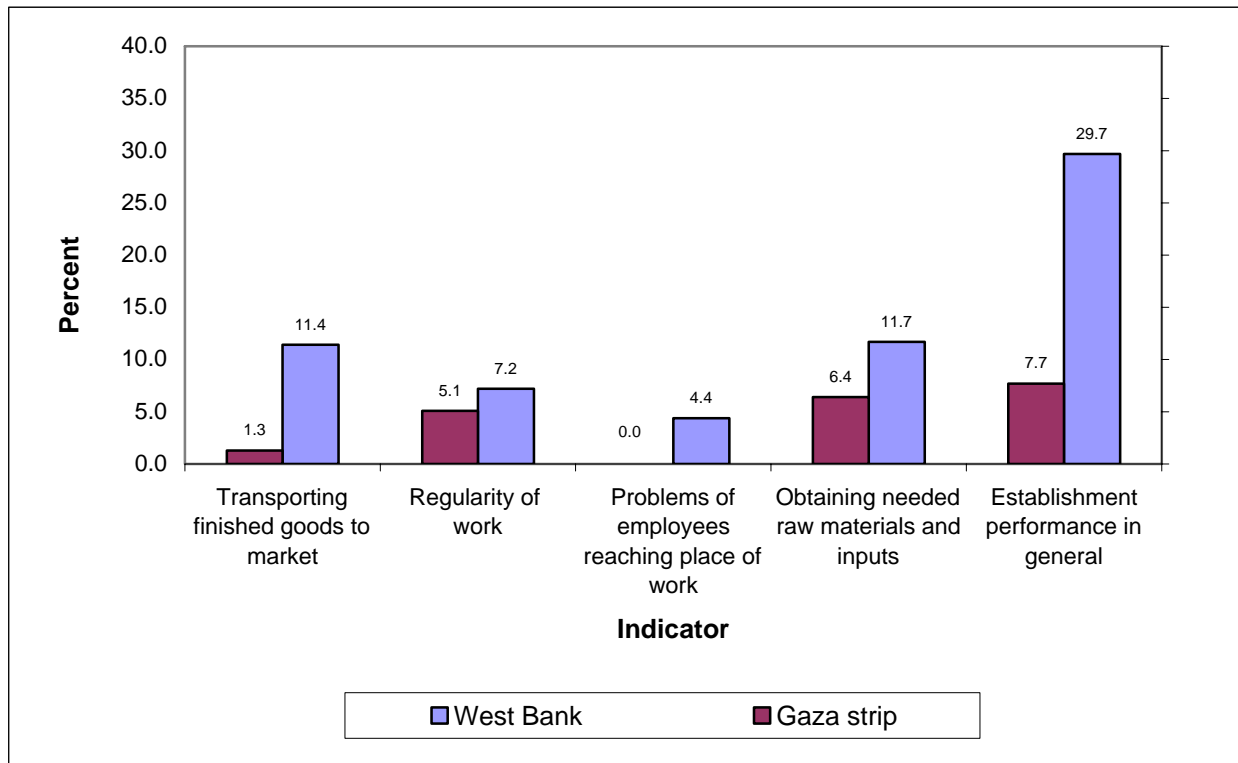
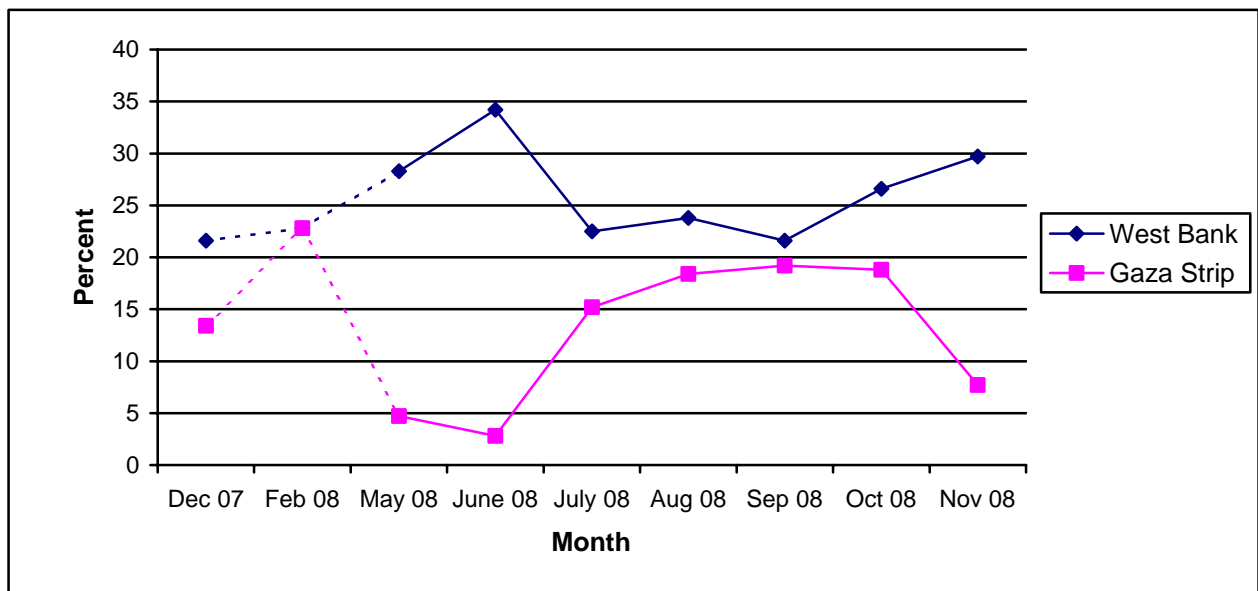


Figure 2: Trends of Establishments Witnessed an Improved Situation in Production Performance during November 2008 Compared to the Previous Month by Region



Tables

2008

Table 1-1: Percentage of the Industrial Establishments Witnessed an Improved Situation During the Reference Month Compared to that before the Reference Month for the Main Indicators in the Palestinian Territory 2008

Indicator	Reference Month									
	2008									
	تشرين ثاني Dec.	تشرين أول Oct.	Sept.	Aug.	July	June	May	April	Mar.	Feb.
Establishment performance in general	25.0	24.8	21.0	22.2	20.9	27.4	23.7	-	-	22.8
Obtaining needed raw materials and inputs	10.6	12.2	10.5	12.4	10.6	29.8	27.9	-	-	21.4
Problems of employees reaching place of work	3.5	6.1	3.6	3.9	3.9	26.2	25.2	-	-	16.7
Regularity of work	6.8	9.8	7.3	7.8	4.2	12.4	9.4	-	-	6.3
Transporting finished goods to market	9.2	8.5	7.1	8.3	11.4	4.5	4.6	-	-	4.0

(-) No Data Available

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2008

Table 1-2: Percentage of Industrial Establishments Witnessed an Improved Situation During the Reference Month Compared to that before the Reference Month for the Main Indicators in the West Bank 2008

Indicator	Reference Month									
	2008									
	تشرين ثاني Dec.	تشرين أول Oct.	Sept.	Aug.	July	June	May	April	Mar.	Feb.
Establishment performance in general	29.7	26.6	21.6	23.8	22.5	34.2	28.3	-	-	22.8
Obtaining needed raw materials and inputs	11.7	10.6	8.8	10.6	11.1	37.3	33.6	-	-	21.2
Problems of employees reaching place of work	4.4	6.5	5.0	4.8	3.9	32.6	30.1	-	-	15.7
Regularity of work	7.2	8.9	6.4	5.2	3.2	15.4	10.9	-	-	6.3
Transporting finished goods to market	11.4	8.2	8.2	10.3	13.6	5.4	5.3	-	-	2.8

(-) No Data Available

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2008

Table 1-3: Percentage of Industrial Establishments Witnessed an Improved Situation During the Reference Month Compared to that before the Reference Month for the Main Indicators in Gaza Strip 2008

Indicator	Reference Month									
	2008									
	تشرين ثاني Dec.	تشرين أول Oct.	Sept.	Aug.	July	June	May	April	Mar.	Feb.
Establishment performance in general	7.7	18.8	19.2	18.4	15.2	2.8	4.7	-	-	22.8
Obtaining needed raw materials and inputs	6.4	17.7	15.1	16.7	8.9	2.8	4.7	-	-	22.8
Problems of employees reaching place of work	0.0	4.7	0.0	1.8	3.8	2.8	4.7	-	-	22.8
Regularity of work	5.1	13.0	10.1	14.1	7.6	1.4	3.1	-	-	6.8
Transporting finished goods to market	1.3	9.4	4.0	3.5	3.8	1.4	1.6	-	-	11.4

(-) No Data Available

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2008

Table 2-1: Percentage Distribution of Owners/ Managers of the Industrial Establishments According to Their Opinions of Main Indicators During November 2008 Compared to October 2008 in the Palestinian Territory

Problem	Total	Much Worse	Somewhat Worse	About the Same/ Unchanged	Somewhat Better	Much Better
Establishment performance in general	100	3.3	19.8	51.9	22.8	2.2
Production situation	100	3.0	22.8	48.7	23.6	1.9
Employees productivity	100	2.2	16.8	62.2	17.7	1.1
Obtaining needed raw materials and inputs	100	3.0	10.6	75.8	10.1	0.5
Problems of employees reaching place of work	100	0.0	1.9	94.5	3.3	0.3
Regularity of work	100	2.2	6.5	84.5	6.5	0.3
Transporting finished goods to market	100	0.5	12.0	78.3	9.2	0.0
Financial situations	100	3.5	20.7	59.2	15.5	1.1
Banks credits & facilities	100	0.0	3.0	92.4	4.6	0.0
Level of employment	100	0.5	8.2	82.0	9.0	0.3
Value of sales	100	4.1	24.5	46.7	23.1	1.6

2008

Table 2-2: Percentage Distribution of Owners/ Managers of the Industrial Establishments According to Their Opinions of Main Indicators During November 2008 Compared to October 2008 in the West Bank

Problem	Total	Much Worse	Somewhat Worse	About the Same/ Unchanged	Somewhat Better	Much Better
Establishment performance in general	100	1.7	22.1	46.6	27.2	2.4
Production situation	100	1.4	25.9	42.7	27.9	2.1
Employees productivity	100	0.3	18.6	59.8	20.3	1.0
Obtaining needed raw materials and inputs	100	0.0	10.3	78.0	11.4	0.3
Problems of employees reaching place of work	100	0.0	2.1	93.5	4.1	0.3
Regularity of work	100	0.3	6.2	86.3	7.2	0.0
Transporting finished goods to market	100	0.0	13.1	75.5	11.4	0.0
Financial situations	100	2.1	24.5	54.5	17.9	1.0
Banks credits & facilities	100	0.0	2.8	91.7	5.5	0.0
Level of employment	100	0.3	9.0	79.7	11.0	0.0
Value of sales	100	2.1	27.6	40.3	28.3	1.7

2008

Table 2-3: : Percentage Distribution of Owners/ Managers of the Industrial Establishments According to Their Opinions of Main Indicators During November 2008 Compared to October 2008 in Gaza Strip

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Establishment performance in general	100	9.0	11.5	71.8	6.4	1.3	
Production situation	100	9.0	11.5	70.5	7.7	1.3	
Employees productivity	100	9.0	10.3	71.7	7.7	1.3	
Obtaining needed raw materials and inputs	100	14.1	11.5	68.0	5.1	1.3	
Problems of employees reaching place of work	100	0.0	1.3	98.7	0.0	0.0	
Regularity of work	100	9.0	7.7	78.2	3.8	1.3	
Transporting finished goods to market	100	2.6	7.7	88.4	1.3	0.0	
Financial situations	100	9.0	6.4	76.9	6.4	1.3	
Banks credits & facilities	100	0.0	3.8	94.9	1.3	0.0	
Level of employment	100	1.3	5.1	91.0	1.3	1.3	
Value of sales	100	11.5	12.8	70.6	3.8	1.3	

Table 3: Percentage of Industrial Establishments Witnessed an Improved Situation During the Reference Month (November 2008) Compared to that before the Reference Month for the Main Indicators by Region

Indicator	Gaza Strip	West Bank	Palestinian Territory
Employees productivity	9.0	21.3	18.8
Financial situations	7.7	18.9	16.6
Banks credits & facilities	1.3	5.5	4.6
Level of employment	2.6	11.0	9.3
Value of sales	5.1	30.0	24.7

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2008

Table 4: Percentage Distribution of Owners/Managers of the Active Industrial Establishments According to the Reasons for Sales Level Stability or Decline by Region During November 2008

Reason	Gaza Strip	West Bank	Palestinian Territory
Decrease in demand	5.3	18.2	15.9
Difficulties in exporting finished goods	0.0	2.3	1.9
Decline in the consumer purchasing power	0.0	19.3	15.9
Product Marketing Obstacles	0.0	8.0	6.5
Competence product	0.0	5.7	4.7
Seasonally related	5.2	18.1	15.9
Military check points/ israeli actions/ closures	89.5	14.8	28.0
Other	0.0	13.6	11.2
Total	100	100	100

2008

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Table 5: Percentage Distribution of the Active Industrial Establishments According to the Employment Mobility During November 2008 by Region

Employment Mobility	Gaza Strip	West Bank	Palestinian Territory	
Hiring employees	10.5	5.4	6.1	
Firing employees	10.5	8.0	8.3	
No change	79.0	86.6	85.6	
Total	100	100	100	

2008

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Table 6: Percentage Distribution of the Existing of Competition against the Main Product According to the Owners\ Managers of the Active Industrial Establishments During November 2008 by Region

Competence existence	Gaza Strip	West Bank	Palestinian Territory	
There is competition	68.4	91.7	88.9	
There is no competition	31.6	8.3	11.1	
Total	100	100	100	

2008

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Table 7: Percentage Distribution of the Type of Competition According to the Owners\ Managers of the Active Industrial Establishments During November 2008 by Region

Type of competence	Gaza Strip	West Bank	Palestinian Territory	
Local	88.5	76.0	77.1	
Foreign	11.5	24.0	22.9	
Total	100	100	100	

Table 8: Expectations of Owners/ Managers of the Active Industrial Establishments for the Month that Follows the Reference Month Compared to the Reference (November, 2008) Month for the Main Indicators by Region

Indicator	Reference Month									
	2008									
	تشرين ثاني Nov.	تشرين أول Oct.	Sept.	August	July	June	May	April	Mar.	Feb.
Percentage of who are expecting better establishment situation										
Palestinian Territory	27.5	32.0	33.0	28.0	30.3	32.5	32.8	-	-	31.8
West Bank	27.3	30.7	29.8	21.6	26.3	29.6	29.4	36.0	35.4	31.5
Gaza Strip	28.9	39.2	46.8	58.9	53.2	54.3	46.9	-	-	34.1
Percentage of who are expecting higher employment level										
Palestinian Territory	12.0	10.0	16.1	15.6	10.1	11.9	15.2	-	-	7.3
West Bank	9.7	6.1	10.3	8.5	3.7	6.2	8.0	10.3	10.5	5.1
Gaza Strip	28.9	31.4	40.3	50.0	46.8	54.3	45.4	-	-	20.5
Percentage of who are expecting higher sales volume										
Palestinian Territory	27.5	30.9	33.9	28.6	28.7	32.0	33.2	-	-	33.3
West Bank	27.3	29.4	30.9	22.3	24.5	29.0	29.9	38.9	37.1	33.1
Gaza Strip	28.9	39.2	46.8	58.9	53.2	54.3	46.9	-	-	34.1

(-) No Data Available

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Table 9: Expectations of Owners/ Managers of the Active Industrial Establishments for the Six Months that Follow the Reference Month Compared to the Reference Month (November, 2008) for the Main Indicators by Region

Indicator	Reference Month									
	2008									
	تشرين ثاني Nov.	تشرين أول October	Sept.	August	July	June	May	April	Mar.	Feb.
Percentage of who are expecting better establishment situation										
Palestinian Territory	44.9	41.2	38.8	39.9	34.5	35.7	41.6	-	-	61.7
West Bank	44.6	39.3	35.0	35.7	30.4	32.9	38.5	49.4	57.2	62.2
Gaza Strip	47.4	51.0	54.8	60.7	58.7	57.1	54.7	-	-	58.4
Percentage of who are expecting higher employment level										
Palestinian Territory	20.9	17.4	21.6	19.2	15.1	15.4	22.3	-	-	25.2
West Bank	18.0	12.7	14.8	12.9	8.5	9.7	14.8	15.8	22.9	23.2
Gaza Strip	42.1	43.2	50.0	50.0	54.4	57.1	53.1	-	-	38.9
Percentage of who are expecting higher sales volume										
Palestinian Territory	45.6	41.1	42.5	40.9	35.1	36.6	43.9	-	-	67.6
West Bank	45.3	39.3	39.5	36.8	31.1	34.1	41.3	53.8	59.8	68.9
Gaza Strip	47.4	51.0	54.8	60.7	58.7	55.9	54.7	-	-	58.4

(-) No Data Available

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Table 10: Expectations of Owners/ Managers of the Active Industrial Establishments about Better Expectations for their Establishments for the Month that Follows the Reference Month (November, 2008) Compared to the Reference Month by Region

Indicator	Gaza Strip	West Bank	Palestinian Territory	
Establishment performance in general	28.9	24.5	25.0	
Employees productivity	28.9	16.6	18.0	
Obtaining needed raw materials and inputs	28.9	7.2	9.8	
Problems of employees reaching place of work	2.6	6.9	6.3	
Regularity of work	28.9	9.0	11.4	
Transporting finished goods to market	23.7	11.2	12.7	
Financial situations	28.9	22.0	22.8	
Banks credits & facilities	2.6	7.2	6.7	

Table 11: Expectations of Owners/ Managers of the Active Industrial Establishments about Better Expectations for their Establishments for the Six Months that Follow the Reference Month (November,2008) Compared to the Reference Month for the Main Indicators by Region

Indicator	Gaza Strip	West Bank	Palestinian Territory	
Establishment performance in general	47.3	42.8	43.4	
Employees productivity	47.3	29.1	31.4	
Obtaining needed raw materials and inputs	47.3	10.1	14.5	
Problems of employees reaching place of work	5.3	7.6	7.3	
Regularity of work	42.1	13.0	16.5	
Transporting finished goods to market	42.1	13.0	16.5	
Financial situations	44.7	31.2	32.8	
Banks credits & facilities	5.3	8.0	7.6	

(2008)

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Table 12-1: Percentage Distribution of Owners/ Managers of the Active Industrial Establishments According to Their Opinions of Main Indicators for the Month that Follows the Reference Month (November, 2008) Compared to the Reference Month in the Palestinian Territory

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Establishment performance in general	100	3.8	31.3	39.9	23.1	1.9	
Production situation	100	3.8	35.1	33.6	25.6	1.9	
Volume of sales	100	3.8	36.7	32.0	25.9	1.6	
Employees productivity	100	3.8	24.4	53.8	17.4	0.6	
Obtaining needed raw materials and inputs	100	4.1	10.4	75.7	9.5	0.3	
Problems of employees reaching place of work	100	1.3	3.5	88.9	6.0	0.3	
Regularity of work	100	3.2	11.1	74.3	11.1	0.3	
Level of employment	100	3.2	11.4	73.4	11.7	0.3	
Transporting finished goods to market	100	2.2	14.6	70.6	12.3	0.3	
Financial situations	100	3.8	28.5	44.9	21.5	1.3	
Banks credits & facilities	100	0.6	5.1	87.6	6.7	0.0	

(2008)

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:2-12

Table 12-2: Percentage Distribution of Owners/ Managers of the Active Industrial Establishments According to Their Opinions of Main Indicators for the Month that Follows the Reference Month (November, 2008) Compared to the Reference Month in the West Bank

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Establishment performance in general	100	1.4	30.9	43.2	22.7	1.8	
Production situation	100	1.4	35.3	36.0	25.5	1.8	
Volume of sales	100	1.4	37.1	34.2	25.9	1.4	
Employees productivity	100	1.4	23.4	58.6	16.2	0.4	
Obtaining needed raw materials and inputs	100	1.4	7.6	83.8	7.2	0.0	
Problems of employees reaching place of work	100	1.4	3.2	88.5	6.5	0.4	
Regularity of work	100	1.4	7.9	81.7	9.0	0.0	
Level of employment	100	1.4	8.3	80.6	9.7	0.0	
Transporting finished goods to market	100	1.4	11.9	75.5	11.2	0.0	
Financial situations	100	1.8	27.3	48.9	20.9	1.1	
Banks credits & facilities	100	0.7	4.7	87.4	7.2	0.0	

(2008)

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:3-12

Table 12-3: Percentage Distribution of Owners/ Managers of the Active Industrial Establishments According to Their Opinions of Main Indicators for the Month that Follows the Reference Month (November, 2008) Compared to the Reference Month in Gaza Strip

Problem	Total	Much Worse	Somewhat Worse	About the Same/ Unchanged	Somewhat Better	Much Better
Establishment performance in general	100	21.1	34.2	15.8	26.3	2.6
Production situation	100	21.1	34.2	15.8	26.3	2.6
Volume of sales	100	21.1	34.2	15.8	26.3	2.6
Employees productivity	100	21.1	31.6	18.4	26.3	2.6
Obtaining needed raw materials and inputs	100	23.7	31.6	15.8	26.3	2.6
Problems of employees reaching place of work	100	0.0	5.3	92.1	2.6	0.0
Regularity of work	100	15.8	34.2	21.1	26.3	2.6
Level of employment	100	15.8	34.2	21.1	26.3	2.6
Transporting finished goods to market	100	7.9	34.2	34.2	21.1	2.6
Financial situations	100	18.4	36.8	15.9	26.3	2.6
Banks credits & facilities	100	0.0	7.9	89.5	2.6	0.0

Table 13-1: Percentage Distribution of Owners/ Managers of the Active Industrial Establishments According to Their Opinions of Main Indicators During the Next Six Months Compared to Reference Month (November, 2008) in the Palestinian Territory

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Establishment performance in general	100	3.5	23.1	30.0	40.2	3.2	
Production situation	100	3.8	26.6	24.6	41.8	3.2	
Volume of sales	100	4.1	26.9	23.4	42.4	3.2	
Employees productivity	100	4.1	18.4	46.1	28.2	3.2	
Obtaining needed raw materials and inputs	100	3.8	7.6	74.1	12.0	2.5	
Problems of employees reaching place of work	100	1.6	4.1	87.0	5.4	1.9	
Regularity of work	100	3.2	10.5	69.8	14.6	1.9	
Level of employment	100	3.5	9.8	65.8	18.7	2.2	
Transporting finished goods to market	100	2.5	12.1	68.9	14.6	1.9	
Financial situations	100	3.8	24.2	39.2	30.6	2.2	
Banks credits & facilities	100	0.3	5.1	87.0	7.3	0.3	

Table 13-2: Percentage Distribution of Owners/ Managers of the Active Industrial Establishments According to Their Opinions of Main Indicators During the Next Six Months Compared to Reference Month (November, 2008) in the West Bank

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Establishment performance in general	100	1.4	23.4	32.4	39.6	3.2	
Production situation	100	1.8	27.3	26.3	41.4	3.2	
Volume of sales	100	2.2	27.7	24.8	42.1	3.2	
Employees productivity	100	2.2	18.3	50.4	25.9	3.2	
Obtaining needed raw materials and inputs	100	1.4	6.1	82.4	7.6	2.5	
Problems of employees reaching place of work	100	1.1	4.0	87.3	5.4	2.2	
Regularity of work	100	1.1	9.4	76.5	11.2	1.8	
Level of employment	100	1.4	8.6	72.0	15.8	2.2	
Transporting finished goods to market	100	1.4	10.8	74.8	11.2	1.8	
Financial situations	100	1.8	24.3	42.7	29.0	2.2	
Banks credits & facilities	100	0.4	5.1	86.5	7.6	0.4	

Table 13-3: Percentage Distribution of Owners/ Managers of the Active Industrial Establishments According to Their Opinions of Main Indicators During the Next Six Months Comparing to Reference Month (November, 2008) in Gaza Strip

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Establishment performance in general	100	18.4	21.1	13.2	44.7	2.6	
Production situation	100	18.4	21.1	13.2	44.7	2.6	
Volume of sales	100	18.4	21.1	13.2	44.7	2.6	
Employees productivity	100	18.4	18.4	15.9	44.7	2.6	
Obtaining needed raw materials and inputs	100	21.1	18.4	13.2	44.7	2.6	
Problems of employees reaching place of work	100	5.3	5.3	84.1	5.3	0.0	
Regularity of work	100	18.4	18.4	21.1	39.5	2.6	
Level of employment	100	18.4	18.4	21.1	39.5	2.6	
Transporting finished goods to market	100	10.5	21.1	26.3	39.5	2.6	
Financial situations	100	18.4	23.7	13.2	42.1	2.6	
Banks credits & facilities	100	0.0	5.3	89.4	5.3	0.0	