

MAPPING SKILL-BASED LABOUR MIGRATION PARTNERSHIPS

Between Countries of Origin and Destination



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► FOREWORD

Labour migration remains a driver of economies and societies worldwide. When well-governed, skill-based labour mobility contributes to economic growth, promotes innovation, addresses demographic challenges, and supports the development of human capital in both countries of origin and destination. In the East and Horn of Africa, countries such as Ethiopia, Kenya, and Uganda are increasingly exploring how to expand safe and regular migration opportunities for their growing youth populations, while also leveraging international mobility to build skills, increase remittances, and reduce unemployment. At the same time, several destination countries are actively seeking to fill labour shortages in critical sectors through well-structured migration partnerships.

This study, Mapping Skill-Based Labour Migration Partnerships Between Countries of Origin and Destination, responds to this emerging opportunity by providing a detailed analysis of medium- and high-skilled labour market needs in four selected destination countries, Australia, Canada, Japan, and South Korea, and aligning them with existing and potential skill supply from Ethiopia, Kenya, and Uganda. These destination countries were selected for their openness to structured migration pathways and their need for skilled labour across key sectors, including health care, construction, information and communication technology (ICT), agriculture, hospitality, and manufacturing.

The report provides a robust evidence base for developing skills-based labour migration partnerships. It assesses labour migration policies, immigration pathways, bilateral and multilateral agreements, and sector-specific demands in destination countries. On the supply side, it examines the economic and labour market contexts in the countries of origin, focusing on available skills, youth demographics, institutional readiness, and national migration priorities. It also explores the political and diplomatic dynamics that shape bilateral migration cooperation and offers insights on how origin countries can enhance coordination and preparedness for future partnerships.

One of the key contributions of the study is its forward-looking approach. Rather than simply documenting

existing migration flows, it identifies new corridors and models of cooperation that are both strategic and sustainable. The report highlights how skills development systems, including Technical and Vocational Education and Training (TVET), can be aligned with international labour market needs, and how recognition of qualifications and fair recruitment practices can be strengthened. The report also emphasises the importance of data-driven planning, inter-ministerial collaboration, and engagement with social partners to ensure that labour migration partnerships are inclusive, fair, and effective.

This study was developed under the Better Regional Migration Management (BRMM) programme, implemented by the International Labour Organization (ILO) and funded by the Foreign, Commonwealth and Development Office (FCDO) of the United Kingdom. It draws on desk research, policy analysis, and key informant interviews with representatives from governments, employers' and workers' organizations, technical institutions, and international stakeholders. We are especially grateful to the institutions in both origin and destination countries that generously shared their time, perspectives, and data to inform this important work.

The findings and recommendations in this report are intended to support governments and social partners in designing and negotiating skills-based labour migration partnerships that are rights-based, development-oriented, and mutually beneficial. These partnerships must be built on trust, transparency, and shared responsibility, ensuring that migrant workers are protected throughout the migration cycle, and that both sending and receiving countries derive long-term value from the mobility of talent.

We hope this report serves as a valuable resource for policy-makers, negotiators, researchers, and practitioners working to advance a new generation of labour migration frameworks, ones that are better aligned with global labour market realities and with the aspirations of African youth. At a time when the demand for skills is growing and migration debates are increasingly polarised, we must seize the opportunity to demonstrate that skill-based migration can be a win-win for all.



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▶ Table of contents

▶ Abbreviations and acronyms	6
▶ Glossary of terms	9
▶ Country Demographics	12
Countries of Destination	12
Countries of Origin	13
▶ Executive Summary	14
▶ Introduction	18
▶ Methodology	20
 Part I: Countries of Destination: Case Studies	 21
▶ 1. General Context on Labour Mobility in Destination Countries	22
▶ 2. Labour Market Trends in Australia	23
Legal Frameworks Governing Labour Mobility Partnerships	24
Social Protection Mechanisms for Migrant Workers in Australia	25
Skills Shortages by Level per Sector / Occupation in Australia	25
Classification of Sectors / Occupations Migrant Workers Hired	30
Australia's Existing Bilateral Labour Migration Partnerships	31
Key Stakeholders	33
Conclusion	33
▶ 3. The Case of Canada	34
Labour Market Trends	34
Legal Frameworks Governing Labour Mobility Partnerships	35
Social Protection Mechanisms for Migrant Workers in Canada	36
Skills Shortages by Level and Sector/Occupation in Canada	36
Classification of Sectors / Occupations Migrant Workers Hired	40
Existing Labour Migration Partnerships	43
Key Stakeholders	45
Conclusion	45

► 4. The Case of Japan	46
Labour Market Trends	46
Legal Frameworks Governing Labour Mobility Partnerships	46
Social Protection Mechanisms for Migrant Workers in Japan	48
Table 12: Depiction of Skills Shortages by Level per Sector / Occupation in Japan	49
Classification of Sectors / Occupations Migrant Workers Hired	53
Labour Migration Partnerships: Japan's Bilateral Agreements	54
Key Stakeholders	55
Conclusion	56
 ► 5. The Case of South Korea	 57
Labour Market Trends	57
Legal Mobility Partnerships: Legal Frameworks	57
Social Protection Mechanisms for Migrant Workers in South Korea	59
Skills Shortages by Sector / Occupation in South Korea	59
Sectoral Distribution of Migrant Workers in South Korea	63
Labour Migration Partnerships in South Korea	64
Key stakeholders	66
Conclusion	66
 ► 6. Summary of Key Findings for Part I of the Study	 66
General Characteristics Among Countries of Destination	67
Skills Shortages in Countries of Destination	67

Part II: Countries of Origin: Case studies **68**

► 7. Introduction	69
 ► 8. The Case of Ethiopia	 70
Legal and Policy Frameworks Governing Migration	72
Sectors and Occupations Relevant for Skills-Based Labour Migration Partnerships from Ethiopia	73
Skills Development Patterns: The Case of Ethiopia	75
Conclusion	78
 ► 9. The Case of Kenya	 79
Kenya's Bilateral Development Cooperation with Destination Countries	80
Legal and Policy Frameworks Governing Migration	81
Sectors and Occupations Relevant for Skills-Based Labour Migration Partnerships: The Case of Kenya	83
Skills Development Patterns in Kenya	84
Conclusion	88

► 10. Uganda's Migration and Human Mobility Dynamics	89
Bilateral Development Cooperation between Uganda and Countries of Destination	90
Legal and Policy Frameworks Governing Migration	91
Sectors/ Occupations Relevant for Skills-Based Labour Migration Partnerships from Uganda	91
Skills Development Patterns in Uganda	92
Conclusion	95

Part III: Feasibility of Skills-Based Labour Migration Partnerships	96
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Establishing Skills-Based Labour Migration Partnerships	97
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► ANNEX I: List of Government Officials Interviewed	98
--	-----------

► ANNEX II: Guiding Questionnaire for the Study	99
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► ANNEX III: National Classification System of Skills levels	100
Australia	100
Canada	101
South Korea	103

► List of tables

Table 1. Sectors with Workforce Shortages in Australia	25
Table 2. Industry Employment Projects- Five Years to November 2026	28
Table 3. Distribution of Migrant Workers Across Sectors in Australia	30
Table 4. Overview of Temporary Labour Migration to Canada	35
Table 5. Distribution of NOC Unit Groups by Skill Level/ TEER	37
Table 6. Detailed List of Occupations with Predicted Shortages in Canada (2022-2031)	38
Table 7. Unemployment Rate (%) in Canada from 2019 to 2023	40
Table 8. Canada's SAWP Bilateral Labour Agreements	43
Table 9. Canada Labour Cooperation Agreements	44
Table 10. Canada Labour Chapters of Free-Trade Agreements	45
Table 11. Japanese Occupational Classification System	49
Table 12. Key Occupations in Japan with Labour Shortages	50
Table 13. Bilateral Agreements and Memoranda of Cooperation between Japan and Countries of Origin for Labour Mobility Cooperation for Specified Skilled Workers	55
Table 14. Comparison Between Korean E-9 Visa and H2-Visa	58
Table 15. Bilateral Agreements and Memoranda of Understanding between Korea and Countries of Origin for Labour Migration under the Employment Permit System	65
Table 16. Official Count of Ethiopians Residing in Destination Countries, including Temporary Workers, Permanent Residents, and Naturalized Citizens as Listed in Official National Statistical Counts	71
Table 17. Ethiopian National Qualifications Framework (ENQF) Levels	77
Table 18. Official Count of Kenyans Residing in Destination Countries, including Temporary Workers, Permanent Residents, and Naturalized Citizens as Listed in Official National Statistical Counts	80
Table 19. Kenya National Qualifications Framework Skill Classification	85
Table 20. Nurses Statistics in Kenya - December 2023	87
Table 21. Count of Ugandans Living in Destination Countries, including Temporary Workers, Permanent Residents, and Naturalized Citizens as Listed in Official National Statistical Counts	90
Table 22. The Uganda Vocational Qualifications Framework (UVQF)	94
Table 23. National Occupational Classification (NOC) 2021 Version	101
Table 24. Korean Standard Classification of Occupations (KSCO)	103

► List of figures

Figure 1: Employment Outlook: Projected Employment Growth in Australia (2021-2026) by major occupation and skill level	27
Figure 2: Actual and projected employment by skill levels, November 2021 vs November 2026	29
Figure 3: Australian Bureau of Statistics: Distribution of Migrant Workers by Industry (Fiscal Year 2020/2021)	31
Figure 4: Pacific Australian Labour Mobility Training Type Scheme	32
Figure 5: CERC Migration: Projected Employment Growth by Occupational Skill Level, 2019-2028	37
Figure 6: Statistics Canada, Percentage of New and Recent Immigrant Workers in Canada, by Industrial Sector	41
Figure 7: Statistics Canada, Share of Temporary Foreign Workers among all T4 Earners, by Industry (2010 and 2019)	42
Figure 8: Japanese Immigration Services Agency, Overview of Labour Migration Schemes in Japan	48
Figure 9: 2040 Predictions for Sectors with Labour Shortages in Japan	51
Figure 10: Distribution of Accredited Technical Intern Training Plans (Financial Year 2019)	52
Figure 11: Distribution of Foreign Residents in Japan by Occupation or Reason for Residence	54
Figure 12: Top Projected Occupations (2020-2030) based on annual average increase in employment	61
Figure 13: Korea Employment Information Services: Projected Occupations with Greatest Increases in Employment (2020-2030)	62
Figure 14: Foreign Workers' Employment per Industry in Korea (December 2022)	63
Figure 15: Foreign Workers by Occupation in Korea (December 2022)	64

► Abbreviations and acronyms

ABS	Australian Bureau of Statistics
ANZSCO	Australian and New Zealand Standard Classification of Occupations
BLA	Bilateral Labour Agreement
BLMA	Bilateral Labour Migration Agreement
BTVET	Business, Technical and Vocational Education and Training
CIDA	Canadian International Development Agency
COPS	Canadian Occupational Projection System
CSA	Central Statistical Agency
EDC	Entrepreneurship Development Project
EDI	Entrepreneurial Development Institute
EHoA	East and Horn of Africa Region
ENQF	Ethiopian National Qualifications Framework
ENS	Employer Nomination Scheme
EPS	Employment Permit System
ESDC	conomic Policy Directorate of Employment and Social Development Canada
FDI	Foreign Direct Investment
FY	Fiscal Year
GCM	Global Compact for Migration
GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
GEPV	General Employment Permit Visa
ICT	Information and Communication Technology
ILO	International Labour Organization
IMP	International Mobility Program
IOM	International Organization for Migration
IRCC	Immigration, Refugees, and Citizenship Canada
ITC	Industrial Training Council
JCC	Job Creation Commission
JICA	Japan International Cooperation Agency
JITCO	Japan International Trainee & Skilled Worker Cooperation Organization
JSOC	Japan Standard Occupational Classification
KNOCS	Kenya National Occupational Classification System
KEIS	Korea Employment Information Service

KFSMB	Korean Federation of Small and Medium-sized Businesses
KOICA	Korea International Cooperation Agency
KOSIS	Korean Statistical Information Service
KSA	Kingdom of Saudi Arabia
KSCO	Korean Standard Classification of Occupations
LCAs	Labour Cooperation Agreements
LMIAS	Labour Market Impact Assessment
MLSP	Ministry of Labour and Social Protection
MLTSSL	Medium and Long-term Strategic Skills List
MoC	Memorandum of Cooperation
MOEST	Ministry of Education, Science and Technology
MoES	Ministry of Education and Sports
MoLS	Ministry of Labour and Skills
MoU	Memorandum of Understanding
NEA	National Employment Authority
NITA	National Industrial Training Authority
NOC	National Occupational Classification
NOTU	National Organization of Trade Unions
NSC	National Skills Commission
OECD	Organisation for Economic Co-operation and Development
ODA	Official Development Assistance
PALM	Pacific Labour Mobility Scheme
PAS	Practically Acquired Skills
PMSOL	Priority Migration Skilled Occupation List
ROL	Regional Occupation List
RSMS	Regional Sponsored Migration Scheme
SAGA	Semi-Autonomous Government Agency
SAWP	Seasonal Agricultural Worker Program
SESR	Skilled Employer Sponsored Regional Visa
SDGs	Sustainable Development Goals
SME	Small and Medium Enterprises
STSOL	Short-term Skilled Occupations List
SSW	Specified Skilled Worker

SSWV	Specified Skilled Worker Visa
SWR	Skilled Work Regional Visa
TEER	Training, Education, Experience, and Responsibilities
TITP	Technical Intern Training Program
TFW	Temporary Foreign Workers
TFWP	Temporary Foreign Worker Program
TSS	Temporary Skills Shortage
TVET	Federal Technical and Vocational Education and Training Agencies
TVETQF	Technical and Vocational Education and Training Qualifications Framework
UAERA	Uganda Association for External Recruitment Agencies
UNESCO	United Nations Educational, Scientific and Cultural Organization
UVQF	Uganda Vocational Qualifications Framework
WEDP	Project Coordination Office of the Women Entrepreneurship Development

► Glossary of terms

This glossary presents common terminology relevant to Skills Mobility Partnerships as compiled in the IOM Glossary¹ on Migration and the ILO Glossary of Skills and Labour Migration as well.²

Accreditation	Assurance that programmes, materials and institutions, whether under public or private jurisdiction, meet standards as established by legislation.
Bilateral Labour Migration Agreements (BLMAs)	Bilateral labour migration agreements are arrangements between two States or agencies. They describe in detail the specific responsibilities of each of the parties and the actions to be taken by them to accomplish their specific goals in terms of governance of labour migration. The term includes legally binding bilateral labour agreements and Memoranda of Understanding. ³
Brain Circulation	The effect of the movement of skilled migrants among their countries of origin and other countries, bearing knowledge and skills that can benefit countries of origin as well as countries of permanent or temporary destination.
Brain Drain	Emigration of skilled persons from developing nations - brain drain - which can have dire consequences for sustainable development in the countries of origin, especially the least developed countries.
Certification	The process of issuing a certificate, diploma or other credential formally attesting that a set of learning outcomes or performance criteria has been acquired or demonstrated by an individual. Formal certification is only issued by a recognized certifying body using predefined standards and criteria.
Curriculum	It is a description of what, why, and how well students should learn systematically and intentionally. The curriculum is not an end but rather a means to fostering quality learning.
Circular Migration	A form of migration in which people repeatedly move back and forth between two or more countries.
Country of Destination	A country that is the destination for a person or a group of persons, irrespective of whether they migrate regularly or irregularly.
Country of Origin	A country of nationality or of former habitual residence of a person or group of persons who have migrated abroad, irrespective of whether they migrate regularly or irregularly.
Emigration	From the perspective of the country of departure, the act of moving from one's country of nationality or usual residence to another country so that the country of destination effectively becomes his or her new country of usual residence.

1. International Organization for Migration (IOM) (2023). Skills Mobility Partnerships: Recommendations and Guidance for Policymakers and Practitioners. IOM, Geneva.
2. International Labor Organization. (2021). Glossary of Skills and Labour Migration. [online] [Ilo.org](https://www.ilo.org/global/topics/labour-migration/WCMS_830770/lang-en/index.htm). Available at: https://www.ilo.org/global/topics/labour-migration/WCMS_830770/lang-en/index.htm [Accessed 26 Mar. 2024].
3. UN Network on Migration (2022). Guidance on Bilateral Labour Migration Agreements. https://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---migrant/documents/publication/wcms_837529.pdf

Global Compact for Migration	The Global Compact for Safe, Orderly and Regular Migration (A RES/73/195) is the first intergovernmental agreement, prepared under the auspices of the United Nations, to cover all dimensions of international migration holistically and comprehensively. It was adopted at an intergovernmental conference on migration in Marrakesh, Morocco on 10 December 2018. Objective 18 of the Compact contains a commitment to “Invest in skills development and facilitate mutual recognition of skills, qualifications and competencies.”
Highly Skilled Migrant Worker	A migrant worker who has earned, by a higher level of education or occupational experience, the level of skill or qualifications typically needed to practise a highly skilled occupation.
Highly Skilled Worker	According to ISCO – 08, the occupations are divided into four groups based on the skill level required. Levels 3 & 4 require highly specialised levels of skills.
Labour Migration	Movement of persons from one State to another, or within their own country of residence, for employment.
Labour Mobility	Labour mobility – or mobility of workers – can be either occupational (movement along the occupational ladder) or geographic (movement across geographic locations). In the context of migration, geographic labour mobility is implied.
Labour Shortages	Labour shortages are defined as when there are more job vacancies in the labour market than available workers in the country.
Low-Skilled Migrant Worker	A migrant worker whose level of education, occupational experience, or qualifications make them eligible to practise a typically low-skilled occupation only.
Medium-Skilled worker	The International Standard Classification of Occupations classifies workers at a medium skill level (level 2) as “skilled manual workers”. Skilled-manual work is characterised by routine and repetitive tasks in cognitive and production activities.
Migrant Worker	A person who is to be engaged, is engaged or has been engaged in a remunerated activity in a State in which he or she is not a national.
Migration	The movement of persons away from their place of usual residence, either across an international border or within a State.
Memorandum of Cooperation	This is used to establish common legal terms that establish a “conditional agreement” where the transfer of funds for services is anticipated.
Memorandum of Understanding	is a nonbinding agreement that states each party’s intentions to take action, conduct a business transaction, or form a new partnership.
National Employment Policy	A national employment policy is a vision and a practical, comprehensive plan for achieving a country’s employment goals. It creates a framework that involves and links all the stakeholders – government, international financial institutions, industry and employers, trade union organisations and civil society groups.
National Qualifications Frameworks	A system for placing qualifications that meet certain standards of quality on one of a series of hierarchical levels. A qualifications framework is an instrument for the development and classification of qualifications according to a set of criteria for levels of learning achieved.

National Qualifications Systems	All aspects of a country's activity that result in the recognition of learning.
Occupational Shortages	occur when there are not enough local workers to fill available positions for jobs.
Pre-Departure Training	Before their departure to the destination country, migrant workers "can be invited to attend an integration workshop aimed at providing hints and suggestions on visa and work permit procedures, documents to be prepared, relevant legislation protecting workers, institutions to contact in case of need, contacts with diaspora organisations in the receiving country, and so on".
Qualification	means a formal expression of the vocational or professional abilities of a worker which is recognized at international, national or sectoral levels (ILO, R195)
Seasonal Migrant Worker	A migrant worker "whose work by its character is dependent on seasonal conditions and is performed only during a certain part of the year".
Skills-Based Labour Migration Partnerships	serve as an innovative mechanism for maximizing brain gain, increasing investments in the skills of migrant workers, and promoting fair migration. If designed well, they can bring benefits to workers, employers and governments both in origin and destination countries.
Skill Level	Indicates the complexity and range of tasks and duties to be performed in an occupation.
Skilled Migrant Worker	A migrant worker who has the appropriate skill level and specialisation to carry out the tasks and duties of a given job.
Skills	Skills are the ability to carry out the tasks and duties of a given job. They refer to the relevant knowledge and experience needed to perform a specific task or job and/or the product of education, training and experience which, together with relevant know-how, are the characteristics of technical knowledge.
Skills Mismatch	Skill mismatch refers to a situation in which a person in employment, during the reference period, occupied a job whose skills requirements did not correspond to the skills they possess.
Skills Shortage	occurs when the demand for a particular skill is greater than the supply of qualified workers.
Temporary Migrant	Temporary for-work international migrants, that is, for-work international migrants, entering the country of labour attachment or country of destination to stay for a limited period, which may be less or more than 12 months.
The Working-Age Population	commonly defined as persons aged 15 years and older, although the age limits can vary from country to country.
TVET	Technical & Vocational Education and Training.
Upskilling	Training which supplements and updates existing knowledge, skills and/or competencies.

► COUNTRY DEMOGRAPHICS

Countries of Destination

Australia	Australia's population was at 26 million on 30 June 2022, having grown around 1.3% a year on average over the past 3 decades, from 17.5 million on 30 June 1992. Net overseas migration was the main driver of population growth, increasing from a net inflow of 69,000 people in 1991–92 to 241,000 people in 2018–19, directly contributing just over half of total population growth over the whole period. The 2021 Census of Population and Housing (2021 Census) found that 29% of people in Australia were born overseas and almost half (48%) have a parent born overseas. Natural increase contributed to almost half of population growth, decreasing from 139,000 people in 1991–92 to 124,000 people in 2021–22. Fertility rates have declined, from 1.86 babies per woman in 1991–92 to 1.69 in 2021–22. Life expectancies at birth have continued to increase, from 74.5 years for males and 80.4 years for females in 1992, to 81.3 years for males and 85.4 years for females in 2019–20. The number of deaths has grown faster than the number of births over this period, reflecting the declining fertility rate and ageing of the population. Australia's population growth from 30 June 1992 to 30 June 2022 averaged 1.3% per year. ⁴
Canada	Canada has a population of 38 million people. The main drivers of population growth are immigration and to a lesser extent, natural growth. Canada has one of the highest per-capita immigration rates in the world, driven mainly by economic policy and family reunification. ⁵ The population aged 65 and older is growing fast with the largest cohorts of baby boomers currently reaching age 65. In recent years, people aged 65 and older have outnumbered children aged 0 to 14. ⁶
Japan	The current population of Japan is 127 million. However, it is expected that over 40 years, Japan will lose over a quarter of its population which will be equivalent to the entire population of Malaysia or Peru at present. This accelerated speed of ageing and shrinking of its population places Japan at the leading edge of global demographic change, posing economic and other challenges for the country. In its most recent assessment of Japan's economy, the IMF projects 2020 economic growth to remain resilient at 0.7%. Women's labour force participation has increased significantly in recent years, but in coming years the shrinking and ageing of the population will mean fewer and older workers—depressing both growth and productivity. It is estimated that Japan's economic growth will decline by 0.8 percentage points on average each year over the next 40 years due to demographics alone. ⁷
South Korea	With a combination of declining births and a growing number of the elderly, Korea reported the first natural decline in population in 2020. At this rate, Korea is projected to shed 12 million in the absolute population (current population 51 million) and 19 million in the working-age population from 2020 to 2067. Since 2015 Korea has been facing steadily low birth rates (0.84 children per woman in 2020) and it is projected to become an ultra-aged society by 2025, with the share of elderly exceeding 20% of the entire population. Demographic change in Korea is so fast that its total population is projected to change from the fourth youngest population in the OECD in 2012 to the third oldest one by 2050.

4. 'Profile of Australia's Population', Australian Institute of Health and Welfare, accessed 6 December 2023, <https://www.aihw.gov.au/reports/australias-health/profile-of-australias-population>.

5. Cia.gov. (2024). Available at: <https://www.cia.gov/the-world-factbook/countries/canada/>.

6. Government of Canada and Statistics Canada, 'Canada's Demographic Estimates for July 1, 2023: Record-High Population Growth since 1957', Statcan.gc.ca, 27 September 2023, <https://www150.statcan.gc.ca/n1/daily-quotidien/230927/dq230927a-eng.htm>.

7. 'Japan: Demographic Shift Opens Door to Reforms', IMF, February 2020, <https://www.imf.org/en/News/Articles/2020/02/10/na021020-japan-demographic-shift-opens-door-to-reforms>.

Countries of Origin

Ethiopia	The population of Ethiopia is currently estimated to be around 105 million, the second-largest population in Africa after Nigeria. The population grew at a rate of 2.9% per annum between 1984 and 1994 and 2.5 per cent between 1994 and 2007. This growth took place mainly in rural areas. There are, however, signs that the rate of population increases in rural areas has been slowing down in more recent years. For example, between 1984-1994 and 1994-2007, while population growth in urban areas declined from 2.7 to 2.3 per cent, the rate in rural areas declined by a full percentage point, from 4.8 to 3.8 per cent. ⁸ Recent evidence also suggests that there has been a significant expansion of the urban population, which is growing at an annual rate of 5 per cent. ⁹
Kenya	As of midyear 2020, Kenya had a population of 52.2 million, an annual population growth rate of 2.36%, and 39% of Kenya's population was under the age of 15. The Total Fertility Rate declined from 6.1 in 1990 to 4.4 in 2015 and to 3.5 in 2020. The country's population was 8.1 million in 1963; today it stands at about 55 million people. More people have moved into urban areas too. In 1960 about 7% of the population lived in urban areas; by 2021 it stood at 28%. Kenyan fertility has been and continues to be high, and may be increasing, and shows considerable variation by region, tribal group, and socioeconomic status. ¹⁰ Rapid population growth leads to the effect of diminishing returns associated with population growth pressures on land and other natural resources and has an effect on labour force growth and the aggregate employment situation. ¹¹
Uganda	Uganda's population grew from 9.5 million people in 1969 to 34.9 million in 2014. Concerning the last intercensal period (September 2002), the population increased by 10.6 million people in the past 12 years. Uganda's median age of 15 years is the lowest in the world. Under the most likely scenario, the population of Uganda, currently estimated at 46 million, will at least double between 2020 and 2060, reaching 104 million people. This means that the population density will rise substantially as well. From a population density comparable to that of Italy today, Uganda will surpass India's current population density of 455 people per square kilometre by 2055, and by 2060 it will be about on par with that of South Korea at 529 people per square kilometre. The demographic composition will also change. The working-age population is set to increase from 24 million in 2020 to 69 million by the year 2060. The youth population (ages 0 to 14 years) is projected to rise from 21 million to approximately 29 million by 2060. ¹²

8. Bayru Alebel, Berihu Assefa, Firew Bekele, Tsegay Gebrekidan, Girum Abebe and Mulu Gebreyesus (2018). Background papers for the preparation of 15-year perspective plan Urban Development and Housing in Ethiopia
9. Bayru Alebel, Berihu Assefa, Firew Bekele, Tsegay Gebrekidan, Girum Abebe and Mulu Gebreyesus (2018). Background papers for the preparation of 15-year perspective plan Urban Development and Housing in Ethiopia
10. Catherine Kyobutungi, 'Kenya's Population: 5 Key Findings in the Past 20 Years of Research', The Conversation, 21 June 2023, <http://theconversation.com/kenyas-population-5-key-findings-in-the-past-20-years-of-research-206097>.
11. 'Kenya - Population and Development', World Bank, accessed 6 December 2023, <https://documents.worldbank.org/pt/publication/documents-reports/documentdetail/239271468753267955/kenya-population-and-development>.
12. Cara Myers et al., 'The Demographic Boom: An Explainer on Uganda's Population Trends', World Bank Blogs (blog) (World Bank Group, 18 February 2021), <https://blogs.worldbank.org/african/demographic-boom-explainer-uganda-population-trends>.

► EXECUTIVE SUMMARY

Skilled-based labour migration partnerships are increasingly prominent in labour market policies across regions, for both countries of origin and destination. The demand for labour migrants to fill current and projected shortages in critical sectors of destination countries' labour markets is substantial. Presently, migrant workers with medium, high and specialized technical skills are in high demand in many Organisation for Economic Co-operation and Development (OECD) countries. The demand is driven by demographic shifts in OECD countries, resulting in dwindling of working-age skilled labour workforce and subsequent labour shortages across various sectors and occupations. In contrast, many developing countries view the skills-based migration partnerships as a development opportunity, linking migration and skills development for the mutual benefit of origin and destination countries, migrant workers and communities. This perspective underscores the potential of skills-based migration partnerships to harness migration for economic growth and development in both developed and developing countries.

This study mapped and reviewed labour market needs in selected OECD countries, specifically Australia, Canada, Japan, and South Korea. The findings indicate that all four countries face labour shortages across critical sectors due to demographic changes (declining birth rates and ageing populations) and structural economic shifts (transition to a service economy). These economic transformations have led to a growing service economy in each country, encompassing sectors such as hospitality services, including hotels, tourism, resorts, catering, and accommodation, as well as the care economy, comprising home care, childcare, nursing, and elderly care. Other affected sectors include construction, agriculture, IT, machinery operations, and transportation, particularly truck drivers.

The study reveals that these sectors require migrant workers across all skill levels. However, countries like Australia and Japan prioritize recruiting migrant workers with medium and high skills to meet labour market demands. Additionally, they seek workers with specialized technical skills for factory maintenance, machine repair, and machinery operations. Origin countries aspiring to establish skills-based labour migration partnerships with these destinations should be aware of these preferences and plan strategically.

The study's findings aim to inform the governments of Ethiopia, Kenya and Uganda, which seek to diversify their bilateral labour migration partnerships beyond the Gulf Cooperation Council (GCC) states. The study has identified a range of employment opportunities by sector and occupation in countries of destination experiencing labour shortages, compiling them in a comprehensive and consolidated manner. Familiarity with labour market needs in destination countries enables origin country governments to better prepare for forging skills-based labour migration partnerships with destination country governments in the future.

Other noteworthy findings relevant to the origin country governments include the following. Firstly, the study reveals that destination country governments have established legal frameworks to promote regular labour migration pathways. These frameworks facilitate the recruitment and deployment of migrant workers from origin to destination countries.

Secondly, the study shows that each destination country has Labour Cooperation Agreements (LCAs) with various origin countries, primarily within their regions, driven by geographical proximity and historical, cultural, or trade ties. These LCAs are based on Memoranda of Understanding (MoUs) outlining partnership terms, recruitment processes, and migrant worker rights protection in destination countries.

Notably, while the MoUs emphasize labour migration partnerships, they do not explicitly specify whether these partnerships are skills-based. Despite this, origin countries send migrant workers with diverse skill levels to destination countries. Moreover, selected destination countries already receive significant numbers of migrant workers from regional countries.

In response, Ethiopia, Kenya and Uganda may consider strategically deploying medium and high-skilled migrant workers to these destination countries, leveraging sectors and occupations where they hold a comparative advantage. This study identifies key stakeholders in destination countries responsible for migrant worker management, recruitment, and hiring, including labour ministries, private recruiters, and non-profit organizations.

While destination countries have legal safeguards for migrant workers' social protection, enforcement and implementation gaps persist. Notably, none have ratified the United Nations International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families. However, existing labour rights in destination countries extend to migrant workers and include employment benefits, fair work entitlements, employment insurance, and redress against discriminatory employers.

Based on insights gained from the findings of the study, establishing skilled-based bilateral labour migration partnerships between destination countries and EHOA region-origin countries necessitates meticulous planning, considerable time, and effective coordination with destination country governments. The following initial steps are recommended for origin country governments to consider during the preliminary phase.

Step One

Initiate skills-based labour migration partnership dialogues. The governments of origin countries reviewed in this study have successfully cultivated personal and institutional relationships with stakeholders in both public and private sectors through bilateral dialogues and exchanges. These governments have invested in expanding contacts between relevant ministries and institutions dealing with labour migration issues. To replicate this success, the governments of Ethiopia, Kenya, and Uganda can engage with embassy staff from destination countries, arranging meetings, inviting them to events, and raising awareness about potential skilled migrant workers. They can also dispatch high-level missions to destination countries to initiate partnership discussions through existing bilateral mechanisms. Designating embassies or consulates to proactively engage in partnership-building and appointing labour attachés trained in bilateral labour migration agreement negotiations and skills partnership will further facilitate cooperation.

Building on existing initiatives, such as Kenya's efforts in Germany, Ethiopia's engagements in Poland, Germany, and the UK, and Uganda's activities in Canada, will enhance partnership-building. Additionally, outreach to diaspora communities in destination countries, particularly Canada and Australia, can leverage their agency and capability to establish viable connections between societies, communities, economies, and institutions.

Step Two

Seek and enter partnership agreements through Bilateral Labour Migration Agreements (BLMAs) or Memoranda of Cooperation (MoC) with destination country governments, as precedented in the past. These agreements should outline the terms of skills-based labour migration partnerships, including recruitment procedures, hiring processes, and migrant worker rights protection. Such partnership agreements establish a framework ensuring seamless and secure exchange of migrant workers, eliminating malicious intermediary organizations. They also foster mutual benefits through cooperative scheme operations. BLMAs/ MoCs should specify the sectors and occupations covered, and the selection process for these sectors and occupations.

Step Three

Establish a joint technical committee comprising representatives from both sides to assess the sectors and skills required in destination countries' labour markets. This mechanism facilitates better anticipation and preparation in origin countries, enhancing the workforce's skills to meet destination countries' qualification and competency standards.

A standing joint committee, adopted by countries examined in this study, ensures seamless cooperation implementation upon agreement. This committee is crucial for assessing and verifying existing skills in origin countries, and accreditation processes before deploying labour migrant workers.

Step Four

Leverage existing bilateral development cooperation to integrate skills-based labour migration partnerships into trade and development cooperation agreements with destination country governments. The study shows that EHoA region origin countries have bilateral development relations with selected destination countries, supporting various sectoral projects and programmes.

These existing relations provide an entry point for initiating skills-based labour migration partnerships. Development agencies from destination countries already support educational institutions, such as Technical and Vocational Education and Training (TVET) centres, in origin countries.

This foundation can be built upon to establish bilateral skills-based labour migration programmes, following the completion of matching processes including:

- Recognition of acquired skills and qualifications, and harmonization of educational and training standards between countries.
- By integrating labour migration into development cooperation, countries can foster mutually beneficial partnerships, promoting economic growth and skills development.

Step Five

Adopt a skills-based labour migration strategy, similar to the Germany-Philippines partnership in the nursing sector. This joint venture supports universities and Technical and Vocational Education Training (TVET) institutions in the Philippines, providing specialized training for nurses in demand in Germany.

Upon completing training, some nurses are deployed to German hospitals, while others remain in the Philippines, creating a mutually beneficial arrangement. Moreover, training certificates earned in the Philippines are officially recognized by the German healthcare system.

This partnership exemplifies a successful skills-based labour migration model, benefitting both origin and destination countries, as well as migrant workers. Well-designed partnerships in skills-based migration can promote skills development, labour mobility, and overall development, fostering a cohesive and productive relationship between countries.

Step Six

Identify and select target sectors in advance for potential skills-based labour migration partnerships with destination countries.

These sectors should leverage comparative advantages, such as a surplus of young workers with suitable skills and experience to meet destination countries' labour market demands.

The origin countries examined in this study have adopted this proactive approach. For example, the Philippines has selected qualified workers for Japan's Specified Skilled Worker (I)" programme, covering 14 sectors, including nursing care and food services.

Ethiopia, Kenya, and Uganda can similarly identify sectors aligned with Japan's and other destination countries' labour market requirements. To ensure feasibility, initiate small pilot projects focusing on 2-3 sectors. This strategic approach prioritizes sectors offering immediate opportunities. In Kenya, these include IT and nursing, while in Ethiopia, agriculture and construction show promise. In Uganda, transportation, specifically truck drivers, and homecare services are viable options. These initial projects will provide a solid foundation for future expansion and development.

In summary, these initial steps can be taken to establish skills-based labour migration partnerships in the first phase. Recognizing that such partnerships are a novel scheme being gradually rolled out by origin country governments at various policy levels, a phased approach is advisable.

Well-planned skills-based labour migration partnerships hold immense developmental and economic potential.

Labour migration will remain a significant driver of economic growth and development in the foreseeable future. This study highlights a key lesson: labour migration fosters growing interdependence between developed and developing countries. In essence, forging skills-based labour migration partnerships can strengthen skills development and partnerships between origin and destination countries, benefiting all stakeholders.

► INTRODUCTION

This study assessed opportunities for skills-based labour migration partnerships between origin and destination countries. It mapped, reviewed, and consolidated data on sectors with labour and skills shortages in selected OECD destination countries (Australia, Canada, Japan, and South Korea) that can be filled by skilled migrant workers from origin countries (Ethiopia, Kenya, and Uganda). The study identified employment opportunities in destination countries' labour markets (sectors and occupations) where origin countries can deploy skilled migrant workers to address labour shortages.

This study provides evidence-based information and data to help origin country governments diversify bilateral labour migration partnerships beyond the Gulf States. Establishing skills-based bilateral labour migration partnerships requires thorough preparation, political will, time and concerted efforts.

Skills-based labour migration is increasingly prominent in labour market policies across regions for both origin and destination countries. Countries of origin view it as a tool for development and a means to alleviate high unemployment pressures and their social consequences. Destination countries facing workforce shortages consider labour migration essential for filling critical labour gaps in sectors vital to economic growth and widespread development.

This is particularly true in response to demographic shifts such as declining birth rates and ageing populations in many OECD countries, leading to shortages of skilled workers in various sectors. Structural changes in the global economy, including the shift to a service-based economy¹³ have also created labour demands in sectors like hospitality services (hotels, tourism, resorts, catering, and accommodation) and the care economy (homecare, childcare, nursing care for the elderly).

These sectors require migrant workers with diverse skill levels and capacities in destination countries. The key challenge is strategically matching the workforce supply in origin countries with labour market demands in destination countries.

The report explores potential opportunities for skills-based labour migration partnerships between selected origin and destination countries. Labour shortages in developed countries present opportunities for formalized skills-based labour migration programmes benefitting all parties involved. These partnerships can contribute to accelerating development and economic growth in both origin and destination countries by sharing needed skills through labour migration programmes, creating a win-win situation. This broader approach to labour migration partnerships promotes cooperation for skills development, joint investment in skills development, cost-sharing for training, and increased mobility of skilled workers meeting labour market needs in both countries.

Partnerships ensure recognition and portability of acquired skills, degrees, and qualifications at all skill levels through harmonized educational standards, fostering inter-institutional cooperation. Adopting this approach strengthens national skills systems in origin countries and improves comparability with destination countries' skills systems. As defined by the International Labour Organization, "skills-based partnership is mainly understood as generic terms of skills cooperation, aiming at creating a better 'understanding' and convergence among each other's systems, creating 'transparency' and enabling transferability and comparability of skills and qualifications."¹⁴

13. In the simplest of terms, a service economy is an economy where the primary economic activity is the provision of services rather than manufacturing or the production of goods.

14. International Labor Organization. (2023). Skills harmonisation and partnerships. [online] Ilo.org. Available at: https://www.ilo.org/global/about-the-ilo/how-the-ilo-works/multilateral-system/g20/WCMS_867539/lang--en/index.htm.

Skills-based labour migration partnerships differ from labour migration partnerships in that they prioritize skills development over migration-related issues.¹⁵ By centring on skills development, these partnerships transform education and learning systems in origin countries, enhancing training curriculum quality for sectors in demand in local and destination country labour markets.

This is because skills-based labour migration partnerships advance skills development for the collective economic and development benefits of both origin and destination countries. They promote an integrated approach to skills development for mobility.

This study focuses on skills-based labour migration partnerships, rather than traditional labour migration partnerships, to assess potential opportunities for partnerships between selected countries of origin and destination.

Pursuing skills-based labour migration partnerships aligns with objectives 18 and 23 of the Global Compact for Safe, Orderly, and Regular Migration (GCM). Objective 18 promotes investing in partnerships for skills development and facilitation of mutual recognition of skills, qualifications, and competencies.

Objective 23 strengthens international cooperation and global partnerships for regular migration.¹⁶ Additionally, this approach contributes to achieving Objective 5, enhancing flexibility and expanding regular migration opportunities.

Promoting skills-based labour migration partnerships is timely and policy-relevant. It can shift the migration discourse from a narrow focus on migration management to highlighting positive dimensions of legal and safe pathways for skill-based migration partnerships centred on mutual benefit.

Ultimately, countries of origin aim to leverage migration and human mobility to support sustainable development, aligning with the Sustainable Development Goals (SDGs). Specifically, migration targets are integrated into SDGs 8 (economic growth, employment, and decent work), 10 (reduced inequalities), and 17 (means of implementation).¹⁷

Making migration work for both origin and destination countries is crucial. Labour mobility, when effectively harnessed, can drive progress towards this goal, yielding tangible benefits for migrants, communities, employers, governments, and stakeholders in both countries.

A viable labour migration arrangement requires tripartite dialogue involving governments, employers and workers' representatives on both sides. As labour mobility underpins economic growth and development, enhancing labour migration governance is vital for achieving safe, orderly, and regular migration that benefits all.

15. For instance, different organizations use the term differently, yet there are two fundamental differences in this regard. Skills partnerships generally centre around the comparability and improvement of countries' skills systems - without necessarily implying the movement of people. By contrast, mobility-based partnerships, often called "mobility schemes", imply a movement of people. Within these, partnerships that involve trainees (that move for the purpose of training) need to be differentiated from those that involve (skilled) workers. A specific type of partnership involves the investment of the destination country in the skills system of the origin country.

16. The Global Compact for Migration (GCM) was adopted in 2018 by 164 United Nations member states to facilitate safe, orderly, and regular migration at the local, national, regional, and global levels. The GCM articulates 23 objectives, the implementation of which is reviewed at the international level every four years by governments and civil society organizations. For more information on this, see: 'Intergovernmental Conference in Marrakech on the adoption of the GCM/ United Nations Network on Migration. N1824447.pdf ([un.org](https://www.un.org/migration/n1824447.pdf))

17. This is a breakthrough in the new global development agenda as migration has been incorporated into mainstream global-development policy, rectifying the omission made 15 years earlier in the Millennium Development Goals (MDGs).

► METHODOLOGY

The report's methodology is based on a desk review of various documents, including officially available reports, policy documents, technical briefs on labour market trends, and legislative and legal instruments on labour migration regulations from government institutions in origin and destination countries. Secondary sources, such as reports, evaluations and policy briefs published by international institutions (ILO, International Organization for Migration (IOM), World Bank, OECD) and research institutes, think tanks, and non-governmental organisations were also consulted. Semi-structured interviews with government officials from countries of origin provided additional insights.

The study, which covered seven countries, encountered significant data collection challenges due to its expansive scope and limited timeframe. Key challenges included the absence of baseline data on skills development in origin countries and the fragmentation of existing data across government agencies.

Although data may be available, it is often fragmented across various government agencies, departments and ministries, lacking sector-specific organization (e.g., hospitality, IT, care economy). This fragmentation hinders assessment of student enrolment and graduation numbers per sector per year, as well as skill levels attained post-training. Furthermore, data on employment and unemployment rates after graduation is scarce.

Consequently, the absence of organized sector-specific data complicates determining the availability of a skilled workforce in origin countries for rapid deployment to destination countries.

Despite these challenges, this report provides timely and consolidated information on labour market trends in destination countries that are relevant to origin countries interested in establishing skills-based labour migration partnerships through bilateral agreements. Access to evidence-based information enables origin country governments to better prepare for forging skills-based labour migration partnerships with destination country governments. In essence, this report serves as a foundation for further research on this critical topic rather than a comprehensive review.

The report is structured into three parts. Part 1 examines the legal and institutional frameworks adopted by destination countries to promote regular labour migration pathways in recent years. It also analyzes labour market trends, including sectoral and occupational shortages in each destination country.

Part II assesses the sectors, occupations, and skill levels in the origin countries relevant to the destination countries' labour market needs. It further explores skills development patterns in origin countries and their readiness to deploy medium- and highly-skilled migrant workers to destination countries in the short term. Part III identifies potential opportunities for skills-based labour migration partnerships between origin and destination countries. It outlines entry points and steps for establishing bilateral agreements within a foreseeable period.



PART

1



COUNTRIES OF DESTINATION: CASE STUDIES

► 1. General Context on Labour Mobility in Destination Countries

This section analyzes labour market and labour mobility trends in the selected destination countries: Australia, Canada, Japan, and South Korea. It contextualizes labour migration within the respective national historical, cultural, regional, and social frameworks.

Understanding current cultural and social attitudes toward foreign migrants is crucial for establishing skills-based labour migration partnerships with destination country governments. Comparing differences and similarities between destination countries in terms of past and present migration trajectories provides valuable insights for origin country governments seeking to diversify their bilateral labour migration partnerships in the short and medium term.

Canada and Australia have long histories as migrant destination countries, with their economic development heavily reliant on migration, particularly in Canada. Statistics Canada data (2016) shows African-born individuals comprised 13.4% of recent immigrants, the second-largest group after Europe, and a four-fold increase from 1971 (3.2%).¹⁸ The 2016 census reported 1,067,925 Canadians of African origin.¹⁹ The top five countries of birth for recent African-born immigrants to Canada were Nigeria, Algeria, Egypt, Morocco and Cameroon.²⁰ While both countries have immigration histories, pre-1976 African migrants in Australia primarily came from South Africa.²¹ Later, small numbers arrived from countries like Egypt, Mauritius, Liberia, Sierra Leone, Somalia, and Sudan for study, work, or asylum. In the last two decades, Australia's African communities have grown. The 2020 census recorded that over 400,000 people of African origin account for 1.6% of the Australian population and 5.1% of overseas-born residents.²²

Canada and Australia's diverse migrant population, stemming from various regions, have fostered socially open societies. Both nations boast sizeable migrant communities, including significant African Diasporas. The histories of immigration and multicultural present-day realities facilitate the integration of newly arrived migrant workers into the host societies. Decades of labour migration have equipped both countries with institutional expertise, operational procedures, and historical context to recruit, match, and organize labour migration from countries of origin, addressing their respective labour market needs. Additionally, English, widely spoken in many migrant-sending countries, serves as a common language.

Japan and South Korea's migration trajectories differ significantly from Canada and Australia's. Historically, both Japan and South Korea were primarily labour migration-exporting countries. South Korean migrant workers were sent to West Germany for mining and nursing, and to the Middle East for construction projects.

However, South Korea's rapid economic growth since the late 1980s reduced the incentive for Korean workers to seek employment abroad.²³ Japan had a similar experience, with outflows mainly to South America, Canada, and the United States.²⁴ Today, both Japan and South Korea have transitioned from primarily emigration countries to immigration countries due to their high level

18. Canadian Encyclopedia, www.thecanadianencyclopedia.ca/en/article/africans. and [African immigration to Canada - Wikipedia](https://en.wikipedia.org/wiki/African_immigration_to_Canada)

19. Canadian Encyclopedia, www.thecanadianencyclopedia.ca/en/article/africans.

20. Wikipedia Contributors (2024). African immigration to Canada. [online] Wikipedia. Available at: https://en.wikipedia.org/wiki/African_immigration_to_Canada.

21. Andrew Jakubowicz, 'Australia's Migration Policies: African Dimensions', Human Rights Commission, accessed 5 December 2023, https://humanrights.gov.au/sites/default/files/content/africanaus/papers/africanaus_paper_jakubowicz.pdf.

22. William Abur, 'Migration and Settlement of African People in Australia', in *The Changing Tide of Immigration and Emigration During the Last Three Centuries*. Published: 28 September 2022.

23. Park, Young-bum (1994), 'The Turning Point in International Migration and Economic Development in Korea', in: *Asia and Pacific Migration Journal*, 3 (1), pp. 149-74

24. Yasuo Kuwahara, 'Migrant Workers in the Post-War History of Japan', *Japan Labor Review* 2, no. 4 (2005): 25-47, https://www.jil.go.jp/english/JLR/documents/2005/JLR08_kuwahara.pdf.

of development, rapid industrialization, and demographic shifts. However, their different historical trajectories mean employers in Japan and South Korea may lack experience in organising and handling migrant workers, unlike their counterparts in Canada and Australia. Additionally, Japan and South Korea remain largely homogeneous nations, making them less familiar with migrants from abroad. African migrants in Japan are scarce, mainly from Ghana, Nigeria, South Africa, Egypt, Kenya, Uganda, and Cameroon, often initially arriving as students or English teachers and later deciding to stay or work as South African English teachers.²⁵ As of December 2022, 20,573 African migrants resided in Japan.²⁶ In 2019, the largest African migrant populations in Japan were Nigeria (3,121), Ghana (2,369) Egypt (2,080). Japan's population is approximately 100 million, with 2.8 million are foreign nationals.²⁷ Similarly, in 2019, 20,671 Africans, primarily men, resided in Korea, according to the Korean Statistical Information Service (KOSIS). Most arrived on student, business, or tourist visas but ended up working illegally in the informal sector. Including those who graduated from Korean universities.²⁸ Language remains a challenge for both countries, as foreign migrant workers may struggle to communicate with employers who may not speak English.

Despite differing migration histories, Canada, Australia, Japan, and South Korea face a common challenge: a shortage of working-age labour. This shortage results from ageing populations, declining birth rates, and rapid technological changes, necessitating structural economic transformations. This demographic and economic reality creates a push-and-pull dynamic for labour migration between sending and receiving countries. Consequently, governments of these destination countries are compelled to reform their labour migration laws, facilitating the entry and employment of both skilled and low-skilled workers in labour-intensive industries, such as restaurants and hotels, agriculture and mining, healthcare and caregiving. In South Korea, these sectors are often referred to as the "3-D job sector" (dirty, difficult, and dangerous jobs), which face chronic labour shortages due to local citizens' reluctance to engage in routine manual labour.²⁹ Understanding the historical migration trajectories of these countries of destination is crucial, as they continue to influence contemporary labour mobility trends. The background provides the context for the subsequent sections of the study.

► 2. Labour Market Trends in Australia

Australia's labour market has exhibited significant resilience, with an unemployment rate of 3.8% in December 2023, marking a substantial recovery from the 6.5% rate recorded in December 2020 (Australian Bureau of Statistics).³⁰ The country's employment-to-population ratio stands at 64.4% while the labour force participation rate, encompassing both employed and unemployed individuals seeking work, reaches 67%. As of December 2023, the labour force comprises 14,246,000 actively employed persons, with the majority concentrated in New South Wales,

25. Edmond Akwasi Agyeman, 'African Migrants in Japan: Social Capital and Economic Integration', *Asian and Pacific Migration Journal: APMJ* 24, no. 4 (2015): 463–86, <https://doi.org/10.1177/0117196815609493>.

26. Japanese Immigration Service Agency. 2022. Statistical Table of Foreign Resident Statistics. https://www.moj.go.jp/isa/policies/statistics/toukei_ichiran_touroku.html

27. Study in Japan for Africa. (2014). Voices. [online] Available at: <https://www.studyin-japan-africa.com/english/voices/>.

28. Rita Udor, The Bottom of the Ladder-African Migrants in South Korea-Edinburgh Forum on Korea, <https://blogs.ed.ac.uk/edinburghforumonkorea/2021/09/21/the-bottom-of-the-ladder-african-migrants-in-south-korea/>

29. Sarah Hasan, (2011). Managing Labour Migration to South Korea: Policies and problems regarding migrant workers. In *Korea 2011 Politics, Economy, and Society*. (pp 175-205). https://doi.org/10.1163/9789004219359_011

30. "Labour Force, Australia, December 2023," Australian Bureau of Statistics, January 18, 2024, <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia/latest-release#cite-window1>.

Victoria, and Queensland.³¹ Notably, Australia's near-record low unemployment rate poses potential challenges for the labour market in the coming years.

Legal Frameworks Governing Labour Mobility Partnerships

The Australian government employs a range of legislative instruments to facilitate regular labour migration, serving as vital labour policy tools. These instruments outline visa types and available occupations for prospective migrant workers.³² Specifically, Australia offers various visa categories for international labour migrants, including:

- **Employer Nomination Scheme (ENS) Visa (subclass 186):** This visa enables skilled migrant workers, nominated by their employers, to live and work permanently in Australia.
- **Regional Sponsored Migration Scheme (RSMS) Visa (subclass 187):** The temporary residence transition stream of this visa allows skilled migrant workers, nominated by regional Australian employers, to transition to permanent residency.
- **Temporary Skills Shortages (TSS) Visa (subclass 482):** Also known as the short-term stream, this visa permits Australian employers to address labour shortages by hiring skilled migrant workers when suitably skilled Australian workers are unavailable.
- **Skilled Work Regional (Provisional) Visa (SWR) (subclass 491):** This visa allows skilled migrants, nominated by state or territory governments, to live and work in regional Australia.
- **Skilled Employer Sponsored Regional (Professional) Visa (SESR) (subclass 494):** Regional employers can utilize this visa to address identified labour shortages by sponsoring skilled workers when appropriately skilled Australian workers are unavailable.

Australia's skills-based migration program encompasses various visa types, including those linked to specific occupation lists, including the Short-Term Skilled Occupation List (STSOL), Medium and Long-Term Strategic Skills List (MLTSSL), and Regional Occupation List (ROL). These lists cover a broad range of skills in high demand across the country.³³ The program is globally accessible, open to all countries across regions, and focuses on addressing skills shortages in sectors with high labour demand, including agriculture, tourism, and hospitality industries. Additionally, the Skilled Migration Programme aims to attract entrepreneurs, venture capital, start-ups, and highly skilled migrants with cutting-edge skills.³⁴ A notable aspect of Australia's labour market is the widening skills shortage disparity between regional and metropolitan areas. The persistent nature of skills shortages in regional areas, particularly in industries such as agriculture and mining, presents opportunities for prospective migrant workers. Targeting these regional areas can be a priority in establishing skills-based labour migration partnerships with the Australian government.

31. "Labour Force, Australia, December 2023," Australian Bureau of Statistics, January 18, 2024, <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia/latest-release#cite-window1>.

32. 'Department of Home Affairs', Department of Home Affairs Website, accessed 5 December 2023, <https://www.homeaffairs.gov.au/>.

33. 'Skilled Occupation List', Immigration and citizenship Website, accessed 5 December 2023, <https://immi.homeaffairs.gov.au/visas/working-in-australia/skill-occupation-list>.

34. 'Final Report of the Inquiry into Australia's Skilled Migration Program', Gov.au, 2021, https://parlinfo.aph.gov.au/parlInfo/download/committees/reportjnt/024680/toc_pdf/FinalReportoftheInquiryintoAustralia'sSkilledMigrationProgram.pdf;fileType%3Dapplication%2Fpdf.

Social Protection Mechanisms for Migrant Workers in Australia

Despite not ratifying the United Nations International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, Australia has implemented measures to safeguard migrant workers' rights. The Fair Work Legislation, amended in 2023, extends employment benefits and fair work entitlements to migrant workers, regardless of their migration status, under the Fair Work Act 2009.³⁵ Additional protections include the Migrant Worker Taskforce³⁶ established in 2016, which identifies policy proposals to enhance social protection and address migrant worker exploitation. The Fair Work Ombudsman serves as a reporting channel for fraud or exploitation cases.

Skills Shortages by Level per Sector / Occupation in Australia

The Australian and New Zealand Standard Classification of Occupations (ANZSCO)³⁷ defines skill levels based on formal education training, experience and on-the-job training. Skill levels are categorized as follows: Skill level 1: Bachelor degree or higher qualification; Skill level 2: Advanced Diploma or Diploma; Skill level 3: Certificate IV or Certificate III with at least two years on-the-job training; Skill level 4: Certificate II or III; Skill level 5: Certificate I or secondary education.³⁸

Australia's economy has shifted significantly towards the services sector, increasing demand for a qualified workforce. In response, Australia's skilled migration program targets potential migrant workers from various countries, outlining sectors and occupations facing workforce shortages in the Priority Migration Skilled Occupation List (PMSOL) shown in Table 1.³⁹

►Table 1.

Medium to High-Skilled Sectors with Workforce Shortages in Australia⁴⁰

• Accountant (General, Taxation, and Management) • Auditor (External and Internal) • Electrical Engineer • Civil Engineer • Structural Engineer • Geotechnical Engineer • Transport Engineer • Petroleum Engineer	• Surveyor • Cartographer • Spatial Scientist • Medical Laboratory Scientist • Orthotist/Prosthetist • Multimedia Specialist • Analyst Programmer • Software and Applications Programmer • ICT Security Specialist • Chef/Cook
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35. Attorney-General's Department of Employment and Workplace Relations. (2009). Fair Work Act. <https://www.legislation.gov.au/C2009A00028/2017-09-20/text>

36. Australian Government Department of Employment and Workplace Relations. Migrant Workers' Taskforce. <https://www.dewr.gov.au/migrant-workers-taskforce>

37. Australian Bureau of Statistics. (2022). Conceptual basis of ANZSCO. [online] Available at: <https://www.abs.gov.au/statistics/classifications/anzsco-australian-and-new-zealand-standard-classification-occupations/2022/conceptual-basis-anzsco>.

38. Australian Bureau of Statistics, (2009) 1220.0 - ANZSCO - Australian and New Zealand Standard Classification of Occupations, First Edition, Revision 1 (<https://www.abs.gov.au/ausstats/abs@.nsf/0/598C2E23628BB8FDCA2575DF-002DA6B8?opendocument>)

39. Australian Government, Priority Migration Skilled Occupation List, <https://immi.homeaffairs.gov.au/visas/employing-and-sponsoring-someone/sponsoring-workers/pmsol>

40. Hon Alex Hawke MP, Minister for Immigration, Citizenship, Migrant Services and Multicultural Affairs, Media Release, Supporting Australia's COVID recovery through Skilled Migration, 22 June 2021, accessed 23 June 2021.

The sectors listed above are classified under occupation lists, namely:

- The Short-term Skilled Occupations List (STSOL), addresses immediate labour shortages in specific sectors.
- The Medium and Long-term Strategic Skills List (MLTSSL) Focuses on high-value occupations requiring specialized skills, including information Technology (IT), engineering, and medical professions.
- The Regional Occupation List (ROL) supplements regional employers' workforce needs with additional occupations comprising additional occupations⁴¹

Australia is facing significant skilled migrant shortages, compounded by near-record low unemployment rates. This has resulted in substantial shortages across various sectors, posing challenges for businesses.⁴² In 2022, the most critical labour shortages were observed in the category of technicians and trade workers, where 47% of jobs are in short supply, reflecting an increase from 42% in 2021.⁴³ Specifically, shortages are pronounced among electricians, carpenters, chefs, and motor mechanics. Similarly, the National Skills Commission (NSC) identifies a substantial labour supply shortage in professional occupations, with 39% of jobs in this sector experiencing shortages in 2022, compared to 19% in 2021.⁴⁴ This shortage is particularly concentrated among primary health and education professionals, such as primary and secondary school teachers, general practitioners, and registered nurses. Notable shortages also exist in machinery operators and driver occupations, with 29% facing shortages in 2022, an increase from 17% in 2021. Shortages are particularly evident in freight truck and passenger bus driver positions. Furthermore, the community and personal service worker occupation group has seen a significant increase in labour shortages, rising from 8% in 2021 to 20% in 2022.⁴⁵ The most significant shortages within this category are found among carers for elderly and disabled individuals and childcare workers. These shortages across a range of critical occupations emphasize the need for proactive measures to address the labour market imbalances in Australia.⁴⁶ It's worth noting that 85% of professional occupations surveyed by the NSC are expected to also have moderate or strong future demand in the economy.

The projected employment growth across various occupational groups from 2021 to 2026 is pressing concern, as illustrated in Figure 1. Notably, very high employment growth is forecasted for Professionals defined as knowledge workers with a Skill Level 1 classification are expected to experience a 14.7% increase. Community and Personal Service Workers are anticipated to see a 13.5% increase. Collectively, these two occupational groups are projected to account for 58.1% of total employment growth over the next five years.⁴⁷

41. Department of Home Affairs, Submission 16.2, p. 5

42. A skills shortage occurs when the demand for a particular skill is greater than the supply of qualified workers.

43. 'Final Report of the Inquiry into Australia's Skilled Migration Program', Gov.au, 2021, https://parlinfo.aph.gov.au/parlInfo/download/committees/reportjnt/024680/toc_pdf/FinalReportoftheInquiryintoAustralia'sSkilledMigrationProgram.pdf;fileType%3Dapplication%2Fpdf.

44. 'Final Report of the Inquiry into Australia's Skilled Migration Program', Gov.au, 2021, https://parlinfo.aph.gov.au/parlInfo/download/committees/reportjnt/024680/toc_pdf/FinalReportoftheInquiryintoAustralia'sSkilledMigrationProgram.pdf;fileType%3Dapplication%2Fpdf.

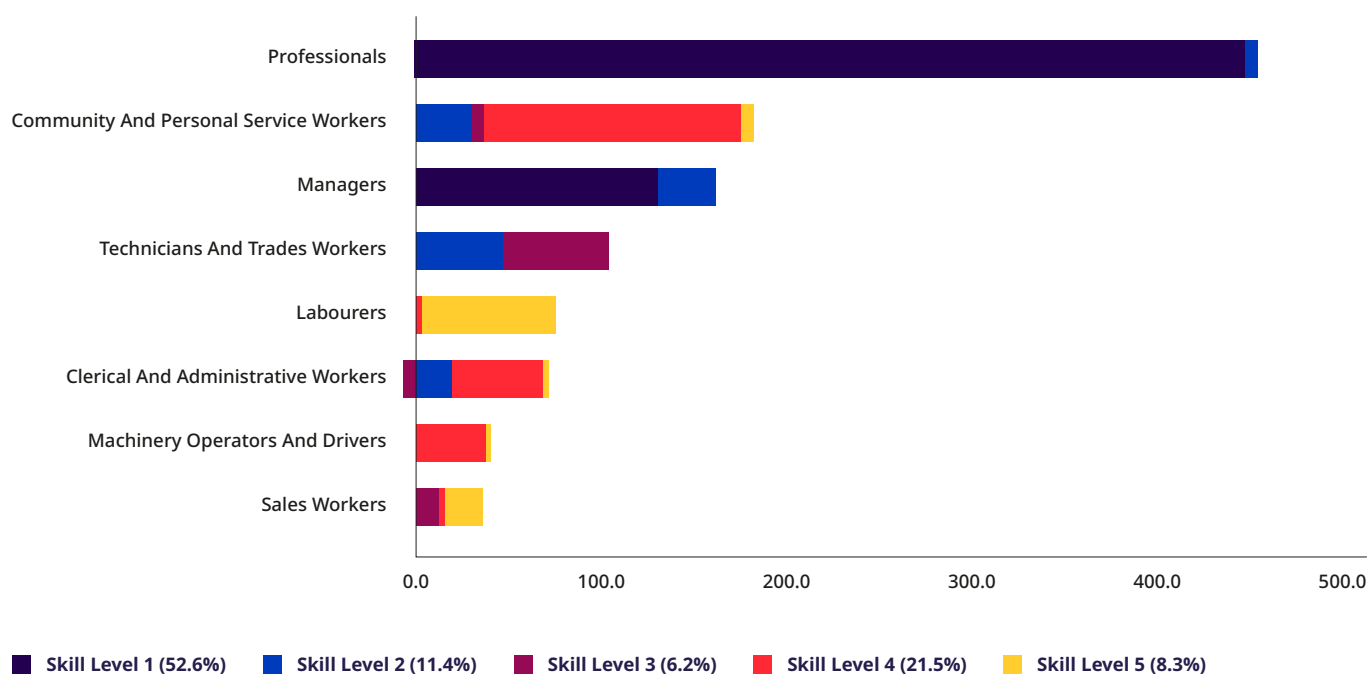
45. 'Final Report of the Inquiry into Australia's Skilled Migration Program', Gov.au, 2021, https://parlinfo.aph.gov.au/parlInfo/download/committees/reportjnt/024680/toc_pdf/FinalReportoftheInquiryintoAustralia'sSkilledMigrationProgram.pdf;fileType%3Dapplication%2Fpdf.

46. Occupation shortage is a job where there are not enough local workers to fill the available positions. Skilled Occupation List', Immigration and citizenship Website, accessed 5 December 2023, <https://immi.homeaffairs.gov.au/visas/work-ing-in-australia/skill-occupation-list>.

47. National Skills Commission, Employment Outlook: Industry and Occupation Trends over the Five Years to November 2026. <https://labourmarketinsights.gov.au/media/l2ueqd0e/employment-outlook-industry-and-occupation-trends.pdf>.

►Figure 1.

Employment Outlook: Projected Employment Growth in Australia (2021-2026) by Occupational Group and Skill Level

Source: This table is taken from the National Skills Commission (2022)⁴⁸

Agricultural worker sorting grains. Ethiopia. © Marcel Crozet / ILO

48. National Skills Commission, 'Projecting Employment to 2026', March 2022, https://www.jobsandskills.gov.au/sites/default/files/2022-03/NSC22-0041_Employ%20Projections_glossy_FA_ACC.pdf

► **Table 2.**
Industry Employment Projects- Five Years to November 2026

Industry	Projected employment growth – five years to November 2026	
	('000)	(%)
Agriculture, Forestry and Fishing	16.2	5.1
Mining	15.9	5.9
Manufacturing	23.1	2.7
Electricity, Gas, Water and Waste Services	2.6	1.9
Construction	66.4	5.8
Wholesale Trade	6.6	1.8
Retail Trade	55.1	4.3
Accommodation and Food Services	112.4	13.2
Transport, Postal and Warehousing	39.9	6.1
Information Media and Telecommunications	0.7	0.4
Financial and Insurance Services	33.2	6.3
Rental, Hiring and Real Estate Services	14.9	6.3
Professional, Scientific and Technical Services	206.6	16.8
Administrative and Support Services	28.8	6.4
Public Administration and Safety	59.2	6.4
Education and Training	149.6	13.4
Health Care and Social Assistance	301.0	15.8
Arts and Recreation Services	23.7	10.1
Other Services	20.3	3.7
All industries	1176.2	9.1

Source: This figure is taken from the Australian National Skill Commission's Employment Outlook Report.⁴⁹

The Australian National Skills Commission (NSC) published a report in 2021 outlining a five-year industry outlook agenda, highlighting labour market skills required for the growing industries (Table 2). Key projections include the following sectors: healthcare and social assistance with 301,000 jobs expected to be created, professional, scientific, and technical services, with 206,600 jobs anticipated, educational and training services, with 149,600 jobs projected, accommodation and food services, with 112,400 jobs expected.⁵⁰ Notable job opportunities are expected to emerge in several occupations. For instance, aged and disabled carers are projected to increase by 74,900 or 28.0%, while registered nurses are expected to grow by 40,400 or 13.9%. Software and application programmers will also see significant growth, with an increase of 42,200 or 27.0%. Other occupations with notable growth include database and systems administrators, and ICT security specialists are expected to grow by 29,100 or 38.9%. Management and organisation analysts will experience growth of 28,200 or 32.2%.⁵¹

49. National Skills Commission, Employment Outlook: Industry and Occupation Trends over the Five Years to November 2026. <https://labourmarketinsights.gov.au/media/l2ueqd0e/employment-outlook-industry-and-occupation-trends.pdf>.

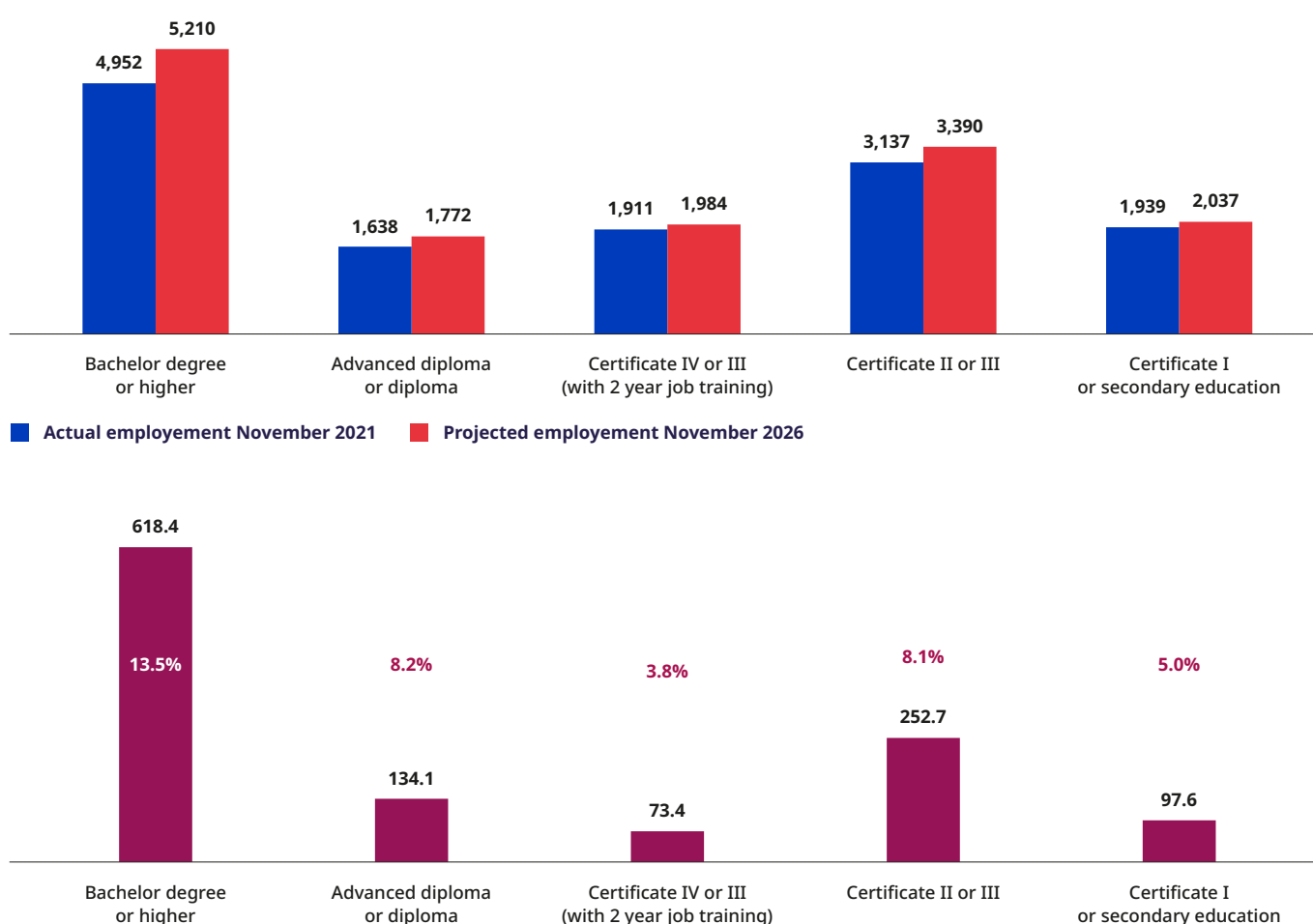
50. National Skills Commission, Employment Outlook: Industry and Occupation Trends over the Five Years to November 2026. <https://labourmarketinsights.gov.au/media/l2ueqd0e/employment-outlook-industry-and-occupation-trends.pdf>.

51. National Skills Commission, 'Projecting Employment to 2026', March 2022, https://www.jobsandskills.gov.au/sites/default/files/2022-03/NSC22-0041_Employ%20Projections_glossy_FA_ACC.pdf.

The NSC identifies core skills in short supply as the "Four C's": Care, Computing, Cognitive abilities, and Communication.⁵² The NSC's projections indicate an increase in skill shortages across all skill levels, as depicted in Figure 2. Notably, Skill Level 1 workers with a Bachelor degree or higher will experience the most significant and rapid growth, accounting for, 52.6% of projected jobs.⁵³ This shortage of skilled labour in key sectors poses a potential challenge to businesses in Australia. Currently, Australia faces skill shortages across all skill levels and this trend is expected to continue over the next five years. Specifically, the NSC predicts occupational growth in aged and disabled carers increasing by 74,900 or 28.0% general clerks increasing by 35,700 or 12.9%), education aides, increasing by 17,600 or 17.4%, waiters, increasing by 15,000 or 12.0%, delivery drivers, increasing by 12,200 or 15.1%, and commercial cleaners, increasing by 11,900 or 7.3%.⁵⁴

► Figure 2.

Actual and Projected Employment by Skill Levels, November 2021 - November 2026



Source: Derived from Universities Australia 2023-2024 Pre-Budget Submission, based on National Skills Commission 2022 Data⁵⁵

52. National Skills Commission, Employment Outlook: Industry and Occupation Trends over the Five Years to November 2026. <https://labourmarketinsights.gov.au/media/l2ueqd0e/employment-outlook-industry-and-occupation-trends.pdf>

53. Universities Australia (2023). 2023-2024 Pre-Budget Submission, <https://universitiesaustralia.edu.au/wp-content/uploads/2023/01/Universities-Australia-2023-24-pre-budget-submission.pdf>

54. National Skills Commission, Employment Outlook: Industry and Occupation Trends over the Five Years to November 2026. <https://labourmarketinsights.gov.au/media/l2ueqd0e/employment-outlook-industry-and-occupation-trends.pdf>

55. Universities Australia (2023). 2023-2024 Pre-Budget Submission, <https://universitiesaustralia.edu.au/wp-content/uploads/2023/01/Universities-Australia-2023-24-pre-budget-submission.pdf> and National Skills Commission, Employment projections data, <https://www.nationalskillscommission.gov.au/topics/employment-projections>.

Classification of Sectors / Occupations Migrant Workers Hired

In Australia, migrant workers predominantly occupy positions in the private sector, accounting for 82.4% per cent of jobs filled. Within this sector, 39.5% of these positions are in large businesses while 52% are in small and medium-sized enterprises, according to Australian Bureau of Statistics (ABS) "Jobs in Australia" data (11 August 2022). The distribution of migrant workers in Australia varies significantly across industries, with the highest percentages found in the following sectors as shown in Table 3.⁵⁶

►Table 3.

Distribution of Migrant Workers Across Sectors in Australia

Sector	Percentage of Jobs Filled by Migrant Workers
Administrative and Support Services	14.1%
Healthcare and Social Assistance	12.1%
Accommodation and Food Services	11.3%
Professional, Scientific, and Technical Services	9.1%
Retail Trade	7.5%

Note: This table is adapted from the Australian Bureau of Statistics⁵⁷

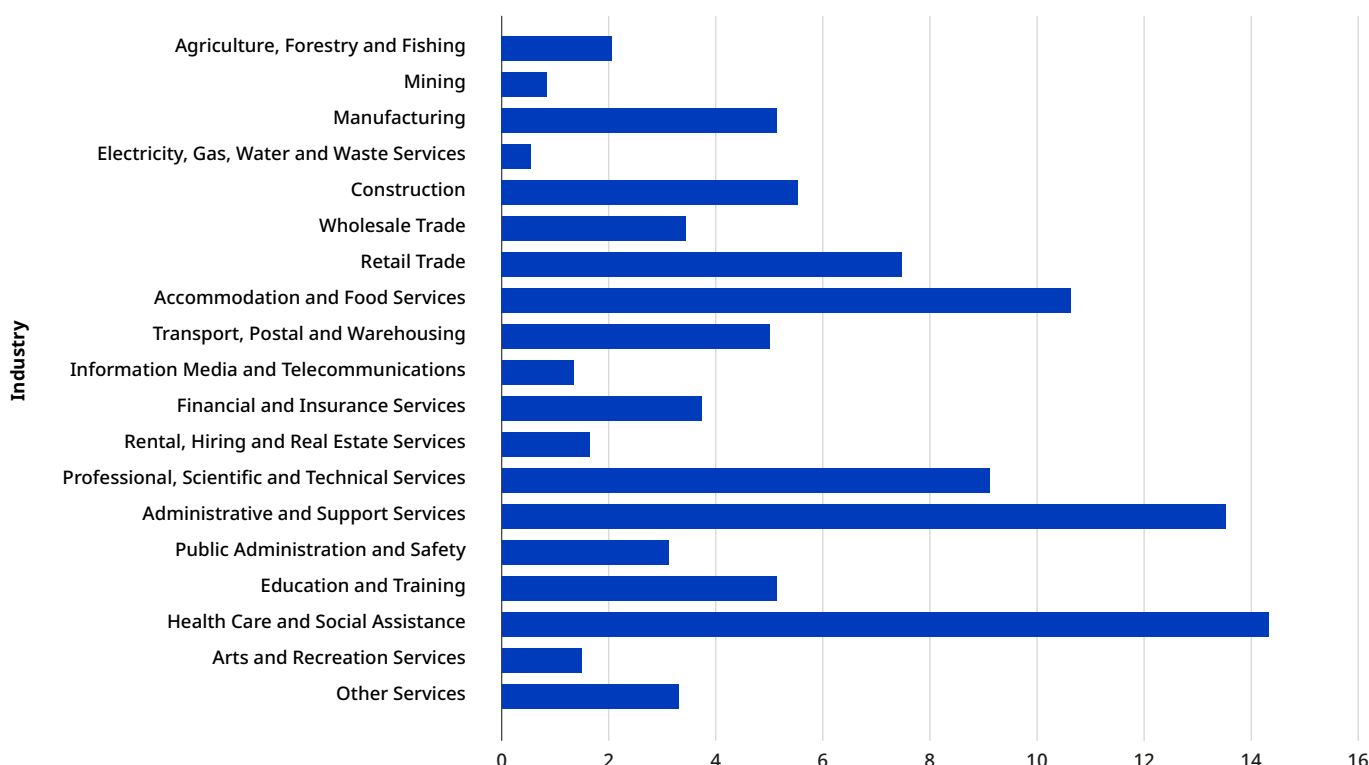
Figure 3 illustrates the distribution of migrant workers' jobs by industry in Australia for the fiscal year 2019-2020.⁵⁸ This visual representation highlights the diverse sectors where migrant workers contribute to the Australian labour force, addressing specific labour market needs and supporting various industries.

56. 'Jobs in Australia', Australian Bureau of Statistics, published on 6 December 2023, <https://www.abs.gov.au/statistics/labour/jobs/jobs-australia/2020-21-financial-year#employed-migrants>

57. 'Jobs in Australia', Australian Bureau of Statistics, published on 6 December 2023, <https://www.abs.gov.au/statistics/labour/jobs/jobs-australia/2020-21-financial-year#employed-migrants>

58. As described in the figure by the ABS, some job records are missing, leading to 8.3% of migrant workers' jobs unaccounted for in the statistics.

► **Figure 3.**
Distribution of Migrant Workers by Industry (Fiscal Year 2020/2021)



Source: This figure is adapted from the Australian Bureau of Statistics⁵⁹

English-speaking migrants generally exhibit higher labour force participation rates compared to those without English Language proficiency.⁶⁰ Specifically, labour migrants from non-English-speaking countries, notably North Africa and the Middle East, face the highest unemployment rates in Australia. This underscores the critical importance of English language proficiency in facilitating successful labour migration to English-speaking countries like Australia and Canada.

Australia's Existing Bilateral Labour Migration Partnerships

The Australian government has established bilateral labour migration partnerships with 10 Pacific countries through the Pacific Labour Mobility Scheme (PALM): Timor Leste, Kiribati, Fiji, Nauru, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu and Vanuatu. Implemented jointly by the Department of Foreign Affairs and Trade, the Department of Employment and Workplace Relations, and the Pacific Labour Facility.⁶¹ PALM enables Australian employers to recruit workers from these countries, Timor-Leste and Pacific islands when local labour is unavailable. The PALM scheme addresses low- and medium-skilled labour shortages in Australia, particularly in regional and rural areas. Additionally, it provides skills development training to support newly arrived migrant workers from the Pacific region and Timor Leste, as visualized in the figure below.

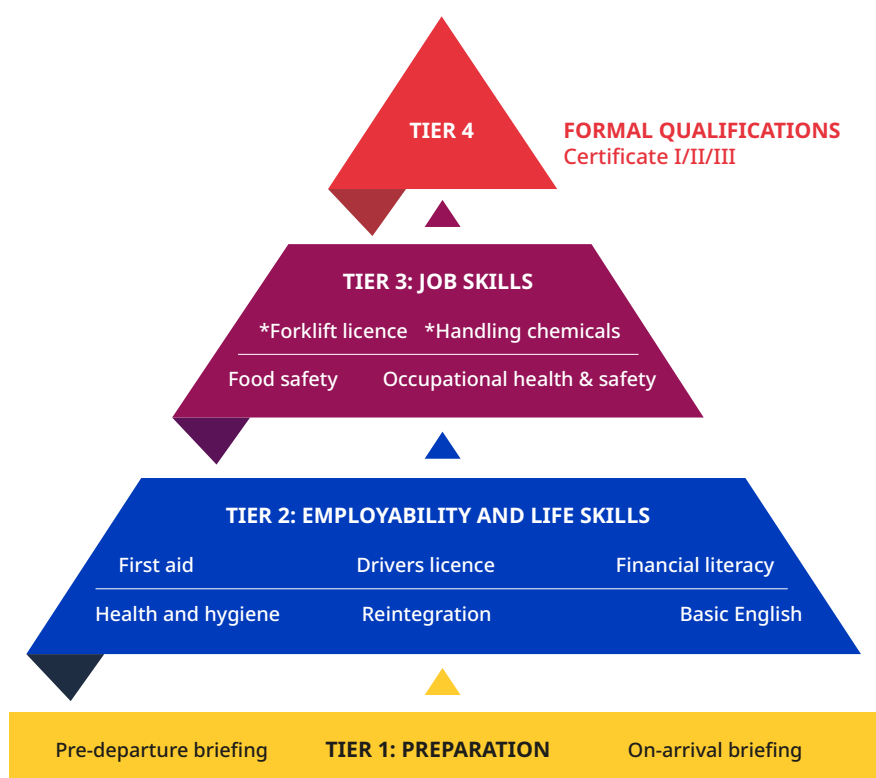
59. 'Jobs in Australia', Australian Bureau of Statistics, published on 6 December 2023, <https://www.abs.gov.au/statistics/labour/jobs/jobs-australia/2020-21-financial-year#employed-migrants>

60. Breunigetal, Breunig, R., Deutscher, N., and To, H.T. (2016). The Relationship Between Immigration To Australia and the Labour Market Outcomes of Australian workers. Productivity Commission. And Edith Cowan University, Migrants wanting to call Australia home still face significant challenges, Published April, 2023. https://phys.org/news/2023-04-migrants-australia-home-significant.html#google_vignette.

61. 'The Pacific Australia Labour Mobility', Gov.au, accessed 5 December 2023, <https://www.palmscheme.gov.au/home>.

Through targeted training programs, migrant workers can enhance their skills, gain more technical knowledge, and develop day-to-day skills, including English language proficiency, to boost productivity. These initiatives benefit both workers and their communities upon return.⁶² The training programmes comprise four distinct categories: Pre-departure and arrival preparation for potential migrant workers, skills enhancement and integration support for workers upon arrival in Australia. Technical skills training, such as food safety certification and forklift operation licensure. Formal qualifications in the industrial sector, recognized by the Australian government, leading to a degree (six months to two years).⁶³

► **Figure 4.**
Pacific Australian Labour Mobility Training Type Scheme



* Accredited unit of competency
Source: The figure is adapted from the PALM Website⁶⁴

In Australia, migrant workers from abroad can be recruited for seasonal short-term employment (less than nine months) or for long-term employment (one to four years), primarily in the agricultural sector. This led to the incorporation of the former Australian Agriculture visa into the PALM Scheme. Recently, the Australian government launched two initiatives: the Skills Development Exchange, a 12-month pilot programme with Indonesia, commenced on August 2023. This programme focuses on medium-to high -skilled occupations in sectors such as: agribusiness and food processing, green economy, creative economy, tourism, mining,

62. Pacific Australia Labour Mobility, accessed 11 February 2024, <https://www.palmscheme.gov.au/skills-development>

63. Pacific Australia Labour Mobility, accessed 11 February 2024, <https://www.palmscheme.gov.au/skills-development>

64. Pacific Australia Labour Mobility, accessed 11 February 2024, <https://www.palmscheme.gov.au/skills-development>

engineering and related technical services, financial and insurance services.⁶⁵ As of October 2023, the Australian government plans to expand the PALM Scheme to additional sectors.⁶⁶

Migrant workers from participating countries contribute to Australia's productivity across various sectors. However, existing bilateral agreements primarily focus on labour migration arrangements rather than skills-based labour migration partnerships outlined in Memoranda of Understanding. Notably, these agreements lack specifications on quota systems, skills development patterns in origin countries, skill levels of migrant workers selected for the programme. The data gap hinders the assessment of skills development patterns pursued by governments of countries of origin with bilateral labour mobility agreements with Australia.⁶⁷

Despite this, the PALM Scheme has facilitated targeted skills development in specific areas, including forklift operation, food safety, and other occupational skills mentioned earlier for migrant workers arriving in Australia.

Key Stakeholders

In the case of Australia, key governmental stakeholders responsible for managing labour migration partnerships primarily include the Department of Home Affairs and the Department of Employment and Workplace Relations (DEWR). THE DEWR plays a critical role in ensuring that all workers have secure and remunerated work and supervises and instructs vocational education and training centres that provide apprenticeships or traineeships to equip workers with new skills. Important governmental partners in labour migration management and integration of migrant workers into the labour market include the Australian Chamber of Commerce, which represents the country's largest business network across all sectors of the economy. The Department of Education also plays a vital role in recognizing, accrediting and developing migrants' skills. Furthermore, the Australian Bureau of Statistics provides reliable data on economic conditions and sector-specific employment opportunities. Regional governments, city councils, trade unions, and regional chambers of commerce which are additionally involved in managing and supporting migrant workers at regional and local levels, ensuring a comprehensive approach to labour migration management.

Conclusion

Australia has long been a destination country for migrant workers, with its economic development significantly reliant on migration. Consequently, the country has developed institutional expertise and operational practices for recruiting, matching, organizing and managing labour migrants from countries of origin. As an English-speaking nation, Australia presents a favourable environment for migrant workers from countries like Kenya, Uganda, and Ethiopia, who possess some proficiency in the language, facilitating communication on the job. The Australian Government has established a comprehensive framework of laws and legislative instruments to facilitate labour migration pathways in response to the country's labour market needs. These measures address persistent labour shortages in critical sectors despite near-full employment.

Currently, 22 sectors - ranging from accounting to food and beverage/cooking (Table 1) - require migrant workers. Australia's shift towards a service-based economy has created a growing demand for labour-intensive services in sectors like restaurants and hotels, tourism, food processing, healthcare, and caregiving.

65. 'Skills Development Exchange', Australian Government, accessed 5 December 2023, <https://www.dfat.gov.au/trade/agreements/in-force/iacepa/outcomes-documents/outcomes-skills-development/skills-development-exchange>.

66. 'Pacific Labour Mobility', Australian Government, accessed 5 December 2023, <https://www.dfat.gov.au/geo/pacific/engagement/pacific-labour-mobility>.

67. Pacific Australia Labour Mobility, Skills Development, <https://www.palmscheme.gov.au/skills-development>.

Migrant workers with diverse skill levels (low, semi, medium and high) are needed to fill these labour gaps. To address this, Australia has established labour migration partnerships with 10 regional countries, which supply migrant workers across various skill categories.

Despite its labour migration initiatives, Australia continues to prioritize skilled migrant workers to address pressing skills shortages in high-demand sectors, including agriculture, tourism hospitality, and healthcare, particularly nursing professionals. These shortages pose significant challenges to the country's labour market, with regional areas facing exacerbated difficulties due to persistent skilled labour gaps. Skilled workers often prefer metropolitan areas, exacerbating regional shortages.

This disparity presents an opportunity for skills-based labour migration partnership between Australia and Eastern and Horn of Africa region countries. Targeting regional areas' specific skill needs could serve as a strategic entry point for such partnerships. By focusing on sectors requiring skilled migrant workers in regional areas, Australia can initiate skills-based collaborations, addressing regional labour market needs while fostering mutually beneficial migration arrangements.

► 3. The Case of Canada

Labour Market Trends

According to the Statistics Canada Labour Force Survey, Canada's seasonally adjusted unemployment rate stood at 5.8% in December 2023. The country also reported a 65% labour force participation rate.⁶⁸ Higher female participation in the labour market has reached a record high of 86%.⁶⁹ Canada faces significant labour market shortages, with a ratio of vacant positions 75% higher than pre-COVID-19 levels, as outlined in the 2023 Federal Budget.⁷⁰ Notably, Canada's economic growth has outpaced that of other G7 countries, recovering by 103% since the pandemic, which is attributed to the COVID-19 Economic Response Plan and Immigration Levels Plan.⁷¹ Canada has experienced the highest rates of immigration rates among G7 countries, helping offset demographic changes, expand the workforce and fill labour gaps, according to the Department of Finance.⁷² Recent immigrants (aged 24-54), have shown the highest employment growth, with a 7% increase between 2019-2021, significantly surpassing the 1.4% growth among Canadian-born individuals.⁷³

68. Government of Canada, Statistics Canada, "Labour Force Characteristics, Monthly, Seasonally Adjusted and Trend-Cycle, Last 5 Months," January 29, 2024, <https://doi.org/10.25318/1410028701-eng>

69. Department of Finance Canada, "Economic Overview | Budget 2023," March 28, 2023, <https://www.budget.canada.ca/2023/report-rapport/overview-apercu-en.html>.

70. Department of Finance Canada, "Economic Overview | Budget 2023," March 28, 2023, <https://www.budget.canada.ca/2023/report-rapport/overview-apercu-en.html>.

71. Department of Finance Canada, "Economic Overview | Budget 2023," March 28, 2023, <https://www.budget.canada.ca/2023/report-rapport/overview-apercu-en.html>.

72. Department of Finance Canada, "Economic Overview | Budget 2023," March 28, 2023, <https://www.budget.canada.ca/2023/report-rapport/overview-apercu-en.html>.

73. Department of Finance Canada, "Economic Overview | Budget 2023," March 28, 2023, <https://www.budget.canada.ca/2023/report-rapport/overview-apercu-en.html>.

Legal Frameworks Governing Labour Mobility Partnerships

Canada has established comprehensive legal and institutional frameworks to facilitate regular labour migration. These frameworks streamline the recruitment of migrant workers from countries of origin through bilateral agreements. To operationalize these frameworks, Canada offers two primary types of work permits: the Temporary Foreign Worker Program (TFWP) and the International Mobility Program (IMP).⁷⁴

The key distinction between the TFWP and IMP lies in the requirement or exemption from a Labour Market test, known as the Labour Market Impact Assessment (LMIA). The LMIA evaluates factors, primarily whether a Canadian worker is available to fill the job position. TFWP migrant workers, typically including agricultural and domestic workers require employers to obtain a positive LMIA before offering employment.

In contrast, the IMP exempts employers from obtaining an LMIA, as certain circumstances may present broader benefits to Canada from hiring a particular worker. IMP migrant workers encompass various categories, including workers under international trade agreements, youth participating in coworking holiday exchanges, postgraduate international students, and charitable and religious workers. This distinction has led to the classification of Canada's work permits as "closed" (TFWP) and "open" (IMP) permit, reflecting differing processes and requirements.⁷⁵

► **Table 4**
Overview of Temporary Labour Migration to Canada

Program	LMIA	Work authorization type	Work permit type
TFWP	Required	Work permit	Employer-specific
IMP	Exempt	Work permit OR work permit exempt	Employer-specific OR open

Source: the table is adopted from Dixon-Perera (2020)⁷⁶

The Temporary Foreign Worker Program (TFWP) issues "employer-specific" or "closed" work permits, conditional on a single employer and specific employment offer. These permits typically do not allow changing employers during their validity period. In contrast, the IMP offers both employer-specific and open work permits, providing flexibility. Open work permits enable migrant workers to change employers without requiring a new permit. In 2018, approximately 70% of work permits issued in Canada were under the IMP, showcasing its flexible approach.⁷⁷

74. Dixon-Perera, L. (2020, June). Regulatory approaches to international labour recruitment in Canada. Immigration, Refugees, and Citizenship Canada. https://www.canada.ca/content/dam/ircc/documents/pdf/english/corporate/reports-statistics/evaluations/R39-2019%20Approach_LabourRec.pdf

75. Lu, Y., & Hou, F. (2019). Temporary Foreign Workers in the Canadian Labour Force: Open Versus Employer specific Work Permits, Economic Insights, Catalogue no. 11-626-X — 2019016 - No. 102, Statistics Canada. <https://www150.statcan.gc.ca/n1/en/pub/11-626-x/11-626-x2019016-eng.pdf?st=KncsCfIw>

76. Dixon-Perera, L. (2020, June). Regulatory approaches to international labour recruitment in Canada. Immigration, Refugees, and Citizenship Canada. https://www.canada.ca/content/dam/ircc/documents/pdf/english/corporate/reports-statistics/evaluations/R39-2019%20Approach_LabourRec.pdf

77. This includes work permit exemptions under section 186 of the IRPR for study permit holders, athletes, and clergy, among others

Social Protection Mechanisms for Migrant Workers in Canada

Although Canada, like Australia, has not ratified the United Nations International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, Canadian law affords Temporary Foreign Workers (TFWs) the same rights as permanent residents and citizens regarding employment agreements. These rights include employment insurance benefits, anti-discrimination agreements, and occupational health and safety measures. Additionally, TFWs contributing to the Canada Pension Plan via taxes are entitled to retirement funding. Employment agreements also cover affordable and safe housing, either through salary deductions or at no cost to employees in the Seasonal Agricultural Worker Program. Specific bilateral agreements, such as those for Mexico and the Caribbean, provide health insurance provisions for workers in Canada. The Canada-Mexico Agreement on Social Security ensures Mexican workers in Canada receive the same social security benefits as Canadian citizens, with portable benefits regardless of residence. TFWs can change employers by applying for a new work permit, particularly in cases of fraud or abuse, through the open work permit stream. Provincial-level organizations, networks, and agencies provide various services to migrant workers upon arrival.

Skills Shortages by Level and Sector/Occupation in Canada

Canada's National Occupational Classification (NOC) system categorizes occupations based on skill levels. Established in 1992 by Employment and Social Development Canada (ESD) Statistics Canada (StatCan), the NOC is updated every two years and underwent significant revisions in 2021. Prior to 2021, Canada used a skill-level categorization system. The revised NOC adopts a broad occupational category (BOC) framework, focusing on work experience, domain, Training, Education, Experience and Responsibilities (TEER) requirements.⁷⁸ The TEER category assesses the type and amount of training, education level, and experience needed for an occupation.⁷⁹ The NOC 2021 combines BOC and TEER into a five-digit code: the first digit: BOC (broad occupational category), second digit: TEER (training and education requirements), third digit: sub-major group, fourth digit: Minor group (occupational domain), Fifth digit: Unit group. The NOC 2021 comprises 516 groups, providing a detailed classification system for Canada's labour market.⁸⁰

Each major group is further divided into: a sub-major group (third digit of the NOC), indicating the occupation's sub-category. Minor group (fourth digit), denoting the occupational domain. Unit group (fifth digit), specifying the precise occupation.

The National Occupational Classification System's hierarchical structure enables detailed categorization. The following table illustrates the classification and distribution of the Canadian population according to the NOC:

78. See Annex III.

79. Introduction to the National Occupational Classification (NOC) 2021 Version 1.0. Accessed 15 February 2024, <https://www.statcan.gc.ca/en/subjects/standard/noc/2021/introductionV1>

80. See Annex III.

► **Table 5.**
Distribution of NOC Unit Groups by TEER Skill Level

NOC 2016 V1.3 Distribution of Unit Groups by Skill Level		NOC 2021 V1.0 Distribution of Unit Groups by TEER	
Skill Level A	20%	TEER Category 0	9%
Skill Level B	42%	TEER Category 1	19%
Skill Level C	24%	TEER Category 2	31%
Skill Level D	6%	TEER Category 3	13%
		TEER Category 4	18%
		TEER Category 5	9%

Source: This table is from Statistics Canada.⁸¹

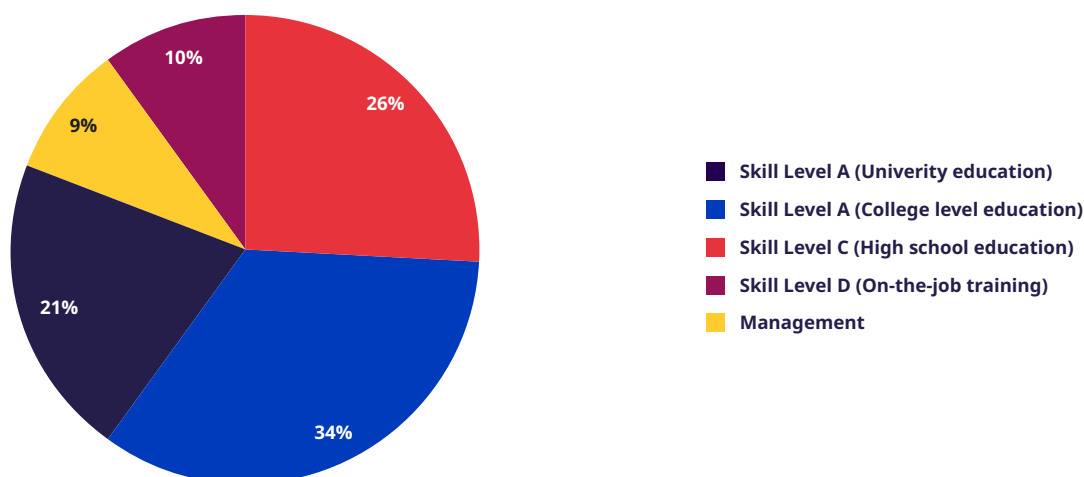
Statistics Canada's analysis reveals that various critical industrial sectors face labour shortages due to difficulties in recruiting and retaining skilled workers. Figure 5 presents a classification system aligned with the Training, Education, experience, and Responsibilities categories discussed earlier. According to projections, approximately 36% of employment growth between 2019 and 2028 will occur in lower-skill occupations, encompassing TEER categories C and D.

These occupations typically require:

- TEER C: High school education
- TEER D: Tacit knowledge acquisition (on-the-job training and experience)

The classification highlights the significance of addressing labour shortages in these sectors.

► **Figure 5.**
Projected Employment Growth by Occupational Skill Level, 2019-2028



Source: The figure is adapted from Banerjee and Hiebert (2021)⁸²

81. Introduction to the National Occupational Classification (NOC) 2021 Version 1.0. Accessed 15 February 2024, <https://www.statcan.gc.ca/en/subjects/standard/noc/2021/introductionV>

82. Rupa Banerjee, Daniel Hiebert. (May, 2021). Leveraging human resources for long-term prosperity: Expanding pathways to permanence for lower skill temporary workers in Canada. Toronto Metropolitan University: CERC in Migration and Integration. https://www.torontomu.ca/content/dam/cerc-migration/Policy/CERC_02_PolicyPaper_May2021.pdf

The 2022 Canadian Occupational Projection System (COPS) relied on the 2016 National Occupational Classification system, which comprises 500 occupations, whereas the updated 2021 version includes 516 occupations.

To facilitate analysis, COPS grouped these occupations into 293 broader categories, considering their relatively small employment sizes.⁸³

Labour market projections (2022-2031) include that fast-growing, high-demand occupations will require intellectual, social, and manual skills.⁸⁴ Approximately 7.7 million jobs are expected to be in demand, driven by economic growth and replacement needs due to retirement.⁸⁵

The following table outlines the primary occupations expected to face labour workforce shortages:

► **Table 6.**

Detailed List of Occupations with Predicted Shortages in Canada (2022-2031)

Skill types	Occupational Groupings with their NOC grouping code
Management Occupations	0211/0212 – Engineering managers & Architecture and science managers, 0213 – Computer and information system managers, 0731 – Managers in transportation
Natural and Applied Sciences and Related Occupations	2131 – Civil engineers, 2133 – Electrical and electronics engineers, 2141/2142 – Industrial and manufacturing engineers & Metallurgical and materials engineers, 2147 – Computer engineers (except software engineers and designers), 2151 – Architects, 2152/2153/2154 – Landscape architects; Urban and land use planners & Land surveyors, 2161 – Mathematicians, statisticians and actuaries, 2171 – Information systems analysts and consultants, 2172 – Database analysts and data administrators, 2173 – Software engineers and designers, 2174 – Computer programmers and interactive media developers, 2271/2272/2273/2274/2275 – Air pilots, flight engineers and flying instructors, Air traffic controllers, Deck officers, water transport Engineer officers, Railway traffic controllers & marine traffic regulators
Health Occupations	3011 – Nursing coordinators and supervisors, 3012 – Registered nurses and registered psychiatric nurses, 3111 – Specialist physicians, 3112 – General practitioners and family physicians, 3113 – Dentists, 3114 – Veterinarians, 3121/3122/3124/3125 – Optometrists, chiropractors, and other health diagnosing and treating professionals, 3132 – Dietitians and nutritionists, 3141 – Audiologists and speech-language pathologists, 3142 – Physiotherapists, 3143/3144 – Occupational therapists & Other professional occupations in therapy and assessment, 3211/3212 – Medical laboratory technologists & technicians, 3214/3215/3216 – Respiratory therapists, clinical perfusionists, and cardiopulmonary technologists & Medical radiation technologists & Medical sonographers, 3232/3236 – Practitioners of natural healing; Massage therapists & Other therapy-related occupations, 3233 – Licensed practical nurses, 3234 – Paramedical occupations, 3413/3414 – Nurse aides, orderlies, patient service associates & Other support occupations in health services
Occupations in Social Science, Education, Government Service and Religion	4033 – Educational counsellors, 4151 – Psychologists, 4161 – Natural and applied science policy researchers, consultants, and program officers, 4215 – Instructors of persons with disabilities, 4412 – Home support workers, housekeepers and related occupations
Sales and Services	6331 – Butchers, meat cutters and fishmongers – retail and wholesale
Trades, Transport and Equipment Operators and Related Occupations	7205 – Construction trades supervisors, 7237 – Welders and related machine operators, 7241 – Electricians (except industrial and power system), 7251 – Plumbers, 7271 – Carpenters, 7311 – Construction millwrights and industrial mechanics, 7313/7316/7318 – Heating, refrigeration and air conditioning mechanics; Elevator constructors and mechanics, 7314/7315 – Railway carmen/women & Aircraft mechanics and aircraft inspectors, 7441 – Residential and commercial installers and servicers, 7511 – Transport truck drivers

83. Canadian Occupational Projection System (COPS). <https://occupations.esdc.gc.ca/sppc-cops/w.2lc.4m.2@-eng.jsp>

84. Canadian Occupational Projection system. <https://www.canada.ca/en/employment-social-development/corporate/reports/research/canadian-occupational-projection-system.html>

85. Canadian Occupational Projection system. Summary of results. <https://occupations.esdc.gc.ca/sppc-cops/l.3bd.2t.1il-shtml@-eng.jsp?lid=107&fid=64&lang=en>

Skill types	Occupational Groupings with their NOC grouping code
Natural Resources, Agriculture and Related Production	8252/8255 – Agricultural service contractors, farm supervisors & specialized livestock workers & Contractors and Supervisors, landscaping, grounds maintenance and horticulture serv., 8431 – General farm workers, 8432 – Nursery and greenhouse workers, 8611/8613/8616 – Harvesting labourers; Logging and forestry labourers, Aquaculture and marine harvest labourers
Occupations Unique to Processing, Manufacturing and Utilities	9462 – Industrial butchers and meat cutters, poultry preparers and related workers, 9463 – Fish and seafood plant workers, 9521/9522/9526 – Aircraft assemblers, aircraft assembly inspectors, motor vehicle assemblers, inspectors and testers & Mechanical assemblers and inspectors, 9617/9618 – Labourers in food and beverage processing & Labourers in fish and seafood processing

Note: This table is adapted from the Canadian Occupational Projection System.⁸⁶

The table illustrates the occupational groupings expected to face labour shortages, including management, health, natural and applied sciences, social science, education, government service and religion, sales and services, trade, transport and equipment operators, natural resources and agriculture and processing, manufacturing and utility occupations. According to the June 2023 Canadian Job Vacancy and Wage Survey (Table 5), the sectors with the most significant labour shortages are accommodation, healthcare and social assistance, administrative and support, waste management, remediation, transportation and warehousing services.⁸⁷ The vacancy rate represents the percentage of job vacancies in demand in the labour market. These sectors face challenges in finding qualified workers to fill available positions. Key findings reveal that accommodation and food services recorded the highest job vacancy rate (7.6%) in June 2023. Businesses in this sector are most likely to anticipate occupational shortages in the first quarter of 2024.⁸⁸

A comprehensive 10-year labour market forecast by the Economic Policy Directorate of Employment and Social Development Canada (ESDC) (Table 6) reveals a critical and rising trend of labour shortages from 2022 to 2031 across various occupational groupings. The data underscores the importance of addressing these labour shortages and implementing effective strategies to meet the workforce demands in these crucial sectors.

86. Economic Policy Directorate and Employment and Social Development Canada. Canadian Occupational Projection System. <https://occupations.esdc.gc.ca/sppc-cops/l.3bd.2t.1ils@-eng.jsp> and the Canadian Occupational Projection system. Summary of results. <https://occupations.esdc.gc.ca/sppc-cops/l.3bd.2t.1ilshhtml@-eng.jsp?lid=107&fid=64&lang=en>

87. In this context, labour shortage is defined as when there are more job vacancies in the labour market than available workers in the country.

88. Katarina Canaj, Shivani Sood, Chris Johnston, (June, 2023). Analysis on Labour Challenges in Canada, Analysis in Brief, Statistics Canada. <https://www150.statcan.gc.ca/n1/pub/11-621-m/11-621-m2023009-eng.htm>

►Table 7

Unemployment rate (%) in Canada from 2019 to 2023⁸⁹

Years	Unemployment rate (%)				
	2019	2020	2021	2022	2023
Total, all industries	5.7%	9.7%	7.5%	5.3%	5.4%
Forestry, fishing, mining, quarrying, oil and gas	7.7%	11.1%	7.5%	5.6%	6.8%
Business, building and other support service	6.2%	10.5%	7.0%	5.2%	6.00%
Information, culture and recreation	5.7%	13.4%	8.00%	5.3%	5.5%
Accommodation and food services	5.8%	18.5%	9.1%	5.6%	5.5%

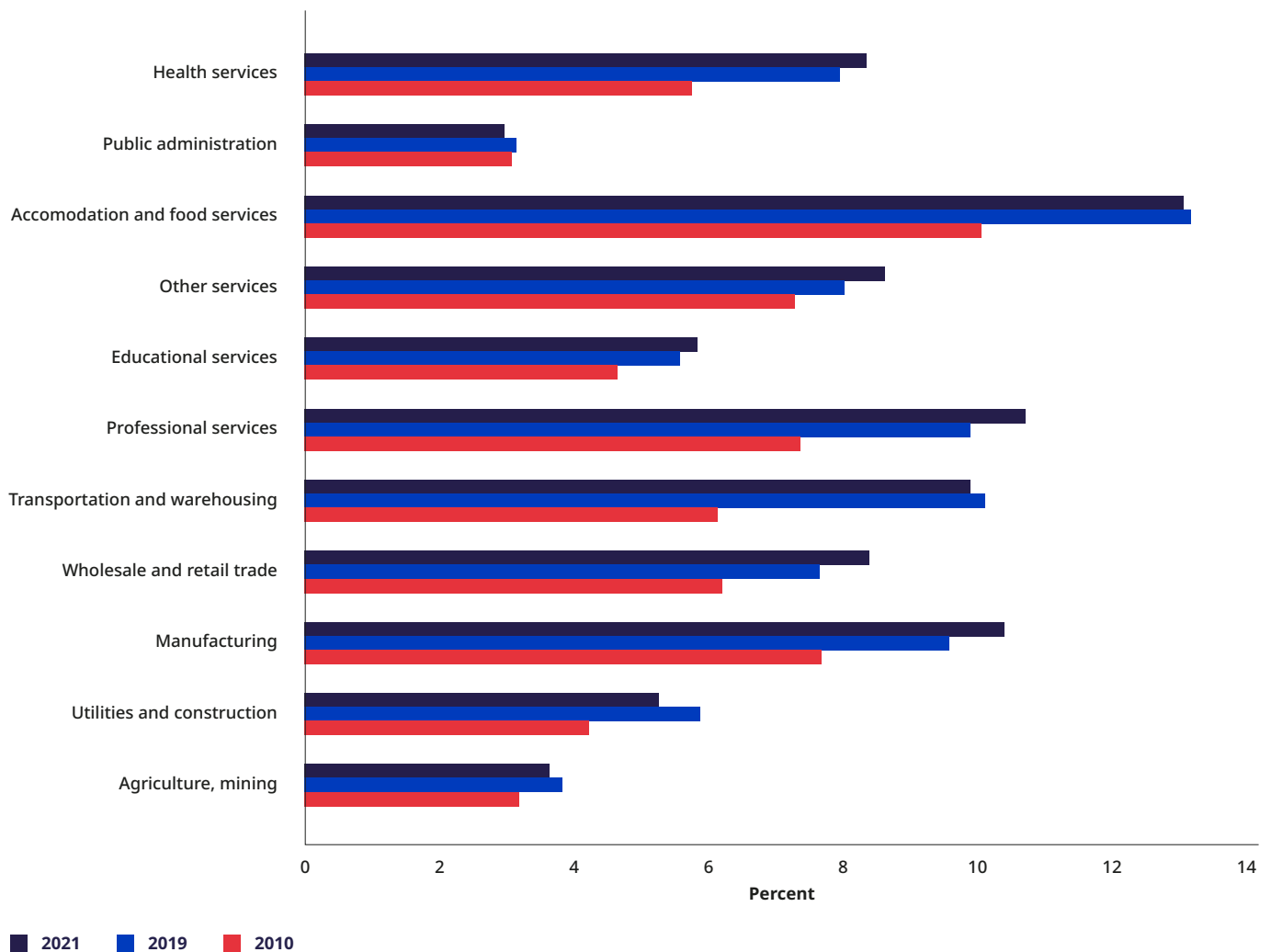
Classification of Sectors / Occupations Migrant Workers Hired

Migrant workers are employed across various industrial sectors in Canada, as illustrated in Figures 6 and 7. The primary sectors hiring migrant workers include accommodation and food services (13%), professional services (11%), such as nurses and teachers, manufacturing (10%), transportation, and warehousing. Migrant workers are also employed in sectors such as health services, wholesale and retail sales, and other services. These workers have played a crucial role in addressing labour shortages, contributing significantly to Canada's labour market stability and growth. Notably, the manufacturing sector's workforce shortage of 159,000 between 2010 and 2021 was partially mitigated by migrant workers.

Canada operates a Temporary Foreign Workers (TFWs) programme, engaging migrant workers across multiple sectors. Figure 6 illustrates that TFWs, primarily from Mexico and the Commonwealth Caribbean countries, are employed in the agricultural, forestry, fishing, and hunting sectors as well as accommodation and food services, administrative and support services, waste management, and remediation services. Furthermore, TFWs are over-represented in higher-skilled occupations, particularly Professional, Scientific, and Technical Services, where they account for 6% of the workforce, and Information and Cultural Industries, where they make up 5% of the workforce. This demonstrates migrant workers' adaptability and versatility in fulfilling labour market demands across low-skilled and higher-skilled roles.

89. Statistics Canada. Labour Force Characteristics by Industry (annual). <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410002301&pickMembers%5B0%5D=1.1&pickMembers%5B1%5D=2.5&pickMembers%5B2%5D=4.1&pickMembers%5B3%5D=5.1&cubeTimeFrame.startYear=2019&cubeTimeFrame.endYear=2023&referencePeriods=20190101%2C20230101>

► **Figure 6.**
Percentage of New and Recent Immigrant Workers in Canada, by Industrial Sector



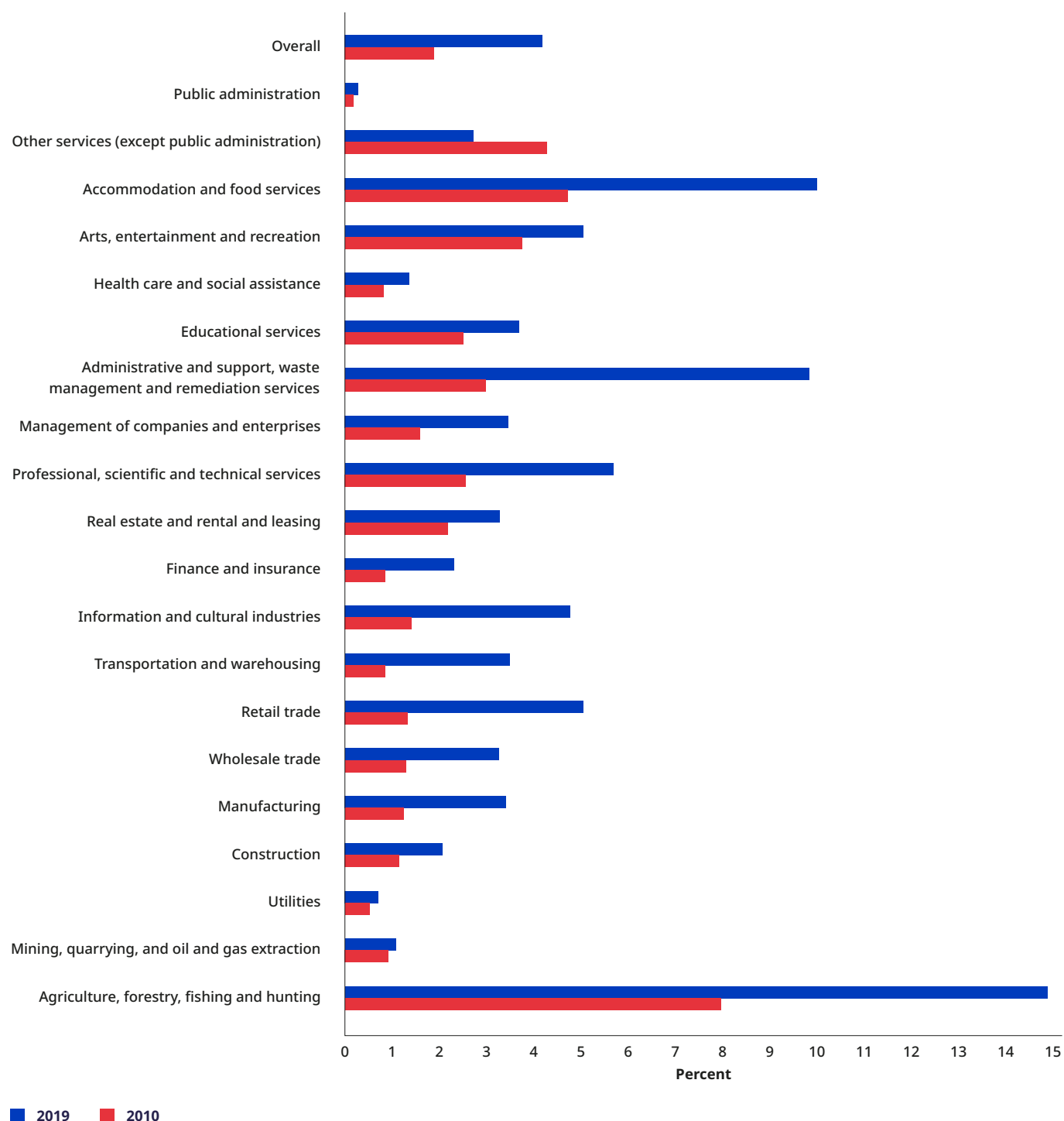
Source: Statistics Canada, Labour Force Survey

Note: This figure is adapted from Statistics Canada ⁹⁰

90. Statistics Canada, Research to Insights: Immigration as a Source of Labour Supply. https://www150.statcan.gc.ca/n1/en/pub/11-631-x/11-631-x2022003-eng.pdf?st=I1_sO20a

► **Figure 7.**

Share of Temporary Foreign Workers among all T4 Earners,⁹¹ by Industry (2010 and 2019)



Source: Statistics Canada, 2021 Longitudinal Immigration Database, the T4 file and National Accounts Longitudinal Microdata File

Note: This figure is adapted from from Statistics Canada⁹²

91. T4 is a slip that identifies all of the remuneration paid by an employer to an employee during a calendar year.
[T4 slip - Canada.ca](https://www150.statcan.gc.ca/n1/en/pub/11-631-x/11-631-x2022003-eng.pdf?st=I1_sO20a)

92. Statistics Canada, Research to Insights: Immigration as a Source of Labour Supply. https://www150.statcan.gc.ca/n1/en/pub/11-631-x/11-631-x2022003-eng.pdf?st=I1_sO20a

Existing Labour Migration Partnerships

Canada's existing labour migration partnerships are not explicitly skills-based. Nevertheless, migrant workers with diverse skill levels are permitted to enter and work in the country. These partnerships comprise labour cooperation agreements and labour chapters of free-trade agreements, as illustrated in Tables 7, 8, and 9. This study focuses on bilateral labour cooperation agreements between the Government of Canada and various countries of origin. Notably, Canada has established bilateral labour agreements through the Canadian Seasonal Agricultural Worker Program (SAWP) as summarized in Table 6.⁹³

► **Table 8.**
Canada's SAWP Bilateral Labour Agreements

Country	
Mexico	
Anguilla	
Antigua and Barbuda	
Barbados	
Dominica	
Grenada	
Jamaica	
Montserrat	
St. Kitts-Nevis	
St. Lucia	
St. Vincent and the Grenadines	
Trinidad and Tobago	

Canada's labour migration partnerships, such as the SAWP, safeguard migrant workers' basic rights and employment conditions. These agreements commit partner governments to enforcing domestic labour legislation and sharing information sharing on labour matters.⁹⁴

Initially, Canada's migrant worker recruitment efforts focused primarily on Mexico and, to a lesser extent, select Commonwealth Caribbean countries. These workers were mainly employed as farm workers under the SAWP, with Mexico remaining the largest source of regular labour migration in Canada's agricultural sector. This Canada-Mexico SAWP represents a best practice model, delivering mutual benefits to both countries.⁹⁵ Annually, thousands of Mexican workers travel to Canada to work in the agricultural sector for several months, contributing significantly to Canada's agricultural productivity, food security, and the economic well-being of their communities in Mexico. Temporary, seasonal, or circular labour migration arrangements, like SAWP, address immediate workforce needs in destination countries while alleviating unemployment pressures in origin countries.

93. Cristobal Ramón, Ariel G. Ruiz Soto, María Jesús Mora, Ana Martín Gil, 'Temporary Worker Programs in Canada, Mexico, and Costa Rica - MPI', June 2022, https://www.migrationpolicy.org/sites/default/files/publications/mpi-temp-work-path-ways-ca-mx-cr_eng-final.pdf.

94. 'Negotiating and Implementing International Trade-Related Labour Agreements', Government of Canada, accessed 5 December 2023, <https://www.canada.ca/en/employment-social-development.html>.

95. The Five Corridors Project, 'Mexico - Canada: Bilateral Arrangements', English, accessed 5 December 2023, <https://five-corridorsproject.org/mexico-canada/mexico-canada-bilateral-arrangements>.

Canada's growing domestic labour market continues to require additional migrant workers from neighbouring countries and beyond. Migrant workers are essential in various sectors, including agriculture (harvesting fruits and vegetables), caregiving (children and the elderly), transportation (long-haul trucking) labour services, construction, software engineering, academia, and medicine. Canada has established labour cooperation agreements with Mexico, Commonwealth Caribbean countries, Chile, Costa Rica, Peru, Colombia, Panama, Honduras and Jordan (since 2012) for a while. These agreements facilitate the recruitment of migrant workers from diverse sectors. The Temporary Foreign Worker Program specifically addresses agricultural labour needs, with bilateral SAWP agreements outlining sending countries' responsibilities, including worker recruitment, documentation compliance, and representation.⁹⁶

Migrant workers are unevenly distributed across Canada, with 75% concentrated in Ontario, Quebec, and British Columbia. This decentralized approach to labour migration policy implementation (matching, recruiting, and hiring) reflects regional labour market needs.⁹⁷

As Canada recovers from the pandemic, its economy will require workers in various sectors and occupations.⁹⁸ The growing ageing population drives demand for healthcare and social services, while sectors like childcare, family services, commercial transportation, food services, and building construction are expected to grow over the next decade.⁹⁹

► **Table 9.**
Canada Labour Cooperation Agreements

Country	Year of Agreement
Chile	July 1997
Costa Rica	November 2002
Peru	August 2009
Columbia	August 2011
Jordan	October 2012
Panama	April 2013
Honduras	October 2014

96. 'Hire a Temporary Worker through the Seasonal Agricultural Worker Program: Overview', Government of Canada, accessed 5 December 2023, <https://www.canada.ca/en/employment-social-development/services/foreign-workers/agricultural/seasonal-agricultural.html>.

97. 'Hire a Temporary Worker through the Seasonal Agricultural Worker Program: Overview', Government of Canada, accessed 5 December 2023, <https://www.canada.ca/en/employment-social-development/services/foreign-workers/agricultural/seasonal-agricultural.html>.

98. Deutscher, P., Drummond, D., & Rohr, J.O. (2020). The Future of Work Post-Pandemic. Covid-19 Economic Recovery Working Group. School of Policy Studies, Queen's University. <https://qspace.library.queensu.ca/bitstream/handle/1974/28224/The%20Future%20of%20Work%20Post-Pandemic%20Final.pdf?sequence=1&isAllowed=y>

99. Employment and Social Development Canada. (2017a). Canadian Occupational Projection System-Job Openings. Government of Canada. <http://occupations.esdc.gc.ca/sppc-cops/l.3bd.2t.1.3lshhtml@-eng.jsp?fid=1&lid=22&preview=1>

► **Table 10.**
Canada Labour Chapters of Free-Trade Agreements

Canada-Korea Free Trade Agreement: Labour Chapter
Canada-European Union: Comprehensive Economic and Trade Agreement: Labour Chapter
Canada-Ukraine Free Trade Agreement: Labour Chapter
Comprehensive and Progressive Agreement for Trans-Pacific Partnership: Labour Chapter
Canada-Israel Free Trade Agreement: Labour Chapter
Canada-United States-Mexico Agreement: Labour Chapter
Canada-United Kingdom Trade Continuity Agreement: Labour Chapter

Key Stakeholders

In Canada, key stakeholders managing, organizing, recruiting, and handling migrant workers include private international labour recruiters (recruitment brokers) and employment agencies. These intermediaries operate between employers and migrant workers, often spanning multiple jurisdictions and extended periods.

The primary business model involves labour recruiters (both formal and informal) matching local labour demand with international supply, leveraging global networks of brokers, sub-agents, and travel and immigration expertise. Additional stakeholders include Ministry of Employment and Social Development Canada (providing settlement information and job application guidance for immigrants), Provincial Governments, Immigration, Refugees, and Citizenship Canada (IRCC; managing immigration programs, citizenship services, and refugee protection), and Statistics Canada (providing demographic data and research).

At the local level, non-governmental organizations and councils play a crucial role in Canada's labour migration model. Provincial Employment Councils, talent-sourcing partners that facilitate migrant recruitment, and local immigration partnerships supported by the IRRC are essential components. These local immigration partnerships promote community-based partnerships for newcomer integration.

Notably, Canada's decentralized labour migration framework entails distinct provincial-specific considerations. Each of the ten provinces has unique procedures and regulations governing migrant worker management, highlighting the importance of considering regional variations in labour migration policies.

Conclusion

Canada, similar to Australia, has long been a destination country for migrant workers, with its economic growth heavily reliant on migration. Over decades, Canada has accumulated extensive experience in recruiting, matching and managing migrant workers from diverse countries and regions worldwide. As an English-speaking nation, Canada offers easier integration for migrant workers from countries like Kenya, Uganda, and Ethiopia into its domestic labour market. Canada's government has established a comprehensive framework of formal legal instruments and legislative measures to facilitate labour migration pathways in response to domestic labour market needs. This information is crucial for governments in countries of origin seeking bilateral labour migration partnerships with Canada.

Like Australia, Canada boasts a low unemployment rate but faces significant workforce shortages across various sectors, including, as Table 6 depicts, management, health, natural and applied sciences, social science, education, government service and religion, sales and services, trade, transport and equipment operators, natural resources and agriculture and processing, manufacturing and utility occupations. These sectors require migrant workers with diverse skill levels (low, semi, medium and high). Currently, Canada has labour migration partnerships with 12 regional countries that supply migrant workers of all skill types.

Although the partnerships do not explicitly specify skills-based labour migration arrangements, projections indicate that between 2022 and 2031, Canada will have 7.7 million job openings requiring migrant workers due to economic growth and replacement needs for retirees. The study highlights that Canada's hospitality and healthcare sectors will experience the most severe labour shortages in the coming years. Consequently, these sectors offer a strategic entry point for governments of countries of origin to explore skills-based labour migration partnerships with the Government of Canada.

► 4. The Case of Japan

Labour Market Trends

Japan's labour market has demonstrated resilience in recovering from the COVID-19 pandemic-induced recession. As of November 2023, the labour force participation rate stood at 63% (CEIC, 2023).¹⁰⁰ The unemployment rate in December 2023 was 2.4% with forecasts indicating a sustained low rate of 2.8% until 2028.¹⁰¹ However, the youth unemployment rate measured at 3.8% in October 2023.¹⁰² The youth unemployment rate suggests underlying structural challenges for Japan's labour market.¹⁰³ The ageing population has led to a 0.7% decline in employed individuals between December 2019 and May 2023, underscoring the need for migrant workers to address labour market shortages.

Legal Frameworks Governing Labour Mobility Partnerships

Japan has shifted its stance on migration policy in recent years. Previously known for strict immigration regulations, the government has introduced a new labour migration policy to address the country's rapid population decline. Japan's population is projected to decrease by nearly 40 million people over 50 years, approximately one-third of its current population.

100.CEICdata.com, "Japan Labour Force Participation Rate," June 1, 2018, <https://www.ceicdata.com/en/indicator/japan/labour-force-participation-rate>.

101.CEICdata.com, "Forecast: Unemployment Rate," Economic Indicators | CEIC, January 30, 2024, <https://www.ceicdata.com/en/indicator/forecast-unemployment-rate>.

102.TRADING ECONOMICS, "Japan Youth Unemployment Rate," n.d., <https://tradingeconomics.com/japan/youth-unemployment-rate>.

103.Sonali, "Japan's Recruitment Scenario in 2023 – Trends and Statistics," InHunt World, May 10, 2023, <https://inhuntworld.com/japans-recruitment-scenario-in-2023-trends-and-statistics/>.

Japan's rapid population decline, driven by a declining fertility rate and increasing ageing population, necessitates migration policy reforms and greater openness to immigration. The steep population decline poses significant burdens on Japan's labour force and economic development.

Accepting foreign workers could significantly mitigate the annual population decline of approximately 780,000 people.¹⁰⁴

Japan's shift towards a more open immigration policy led to the introduction of the Specified Skilled Worker Visa (SSWV) scheme in April 2019.¹⁰⁵ This scheme comprises two categories, as illustrated in Figure 8: Specified Skilled Worker (I) and Specified Skilled Worker (II).

The SSWV scheme permits semi-skilled migrant workers to enter and work in Japan, marking a notable departure from previous policies primarily issuing visas to high-skilled professionals, such as lawyers and doctors. This initiative aims to address labour shortages in sectors facing insufficient domestic workforce.

The Specified Skilled Worker scheme (I) applies to 14 specific sectors, covering workers with specialized knowledge or experience. Initially, these workers can stay in Japan for five years, with options for annual renewals. However, they are not permitted to bring their families. In contrast, the Specified Skilled Worker (II) scheme targets workers in the Construction and Shipbuilding industries with medium technical skill levels.¹⁰⁶ These workers can stay in Japan permanently and are allowed to bring their families. Japan's new labour migration policy demonstrates its willingness to welcome migrant workers to address labour shortages across diverse sectors, ensuring sustainable development in the long term.

► Sectors with Labour Shortages under the Specified Skilled Worker Scheme (II)

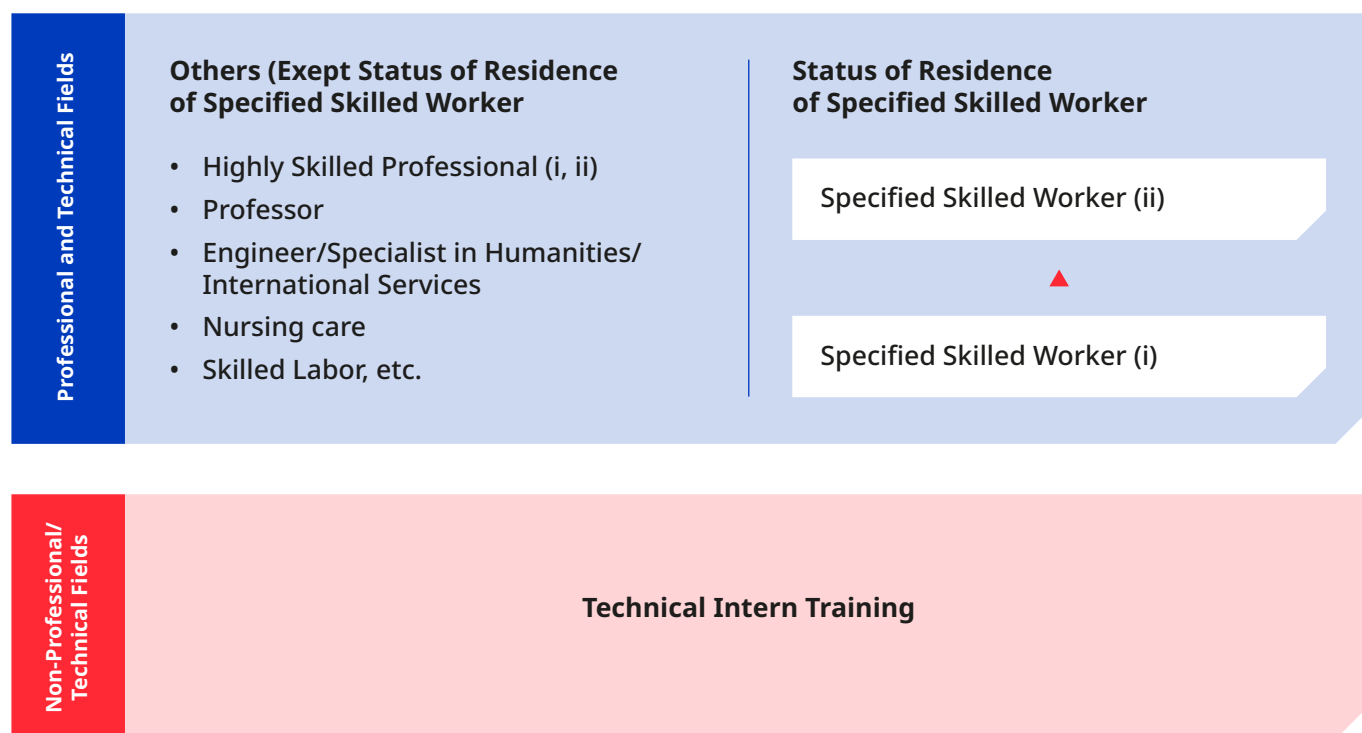
- | | |
|--|---|
| <ul style="list-style-type: none"> • Nursing care • Building cleaning • Material processing industry • Industrial machinery manufacturing industry • Electric and electronic information-related industry • Construction • Shipbuilding and ship-related industry | <ul style="list-style-type: none"> • Automobile maintenance • Aviation • Lodging • Agriculture • Fisheries • Food and beverages manufacturing industry • Food service industry |
|--|---|

104. Tsuya, N., *The Impacts of Population Decline in Japan: Demographic Prospects and Policy Implications, Re-examining Japan in Global Context*; May 2014.

105. 'Policy Brief No. 5', Mfasia.org, accessed 5 December 2023, <https://mfasia.org/policy-brief-no-5-japans-specialized-skilled-worker-visa/>.

106. Japan International Trainee & Skilled Worker Cooperation Organization (JITCO).

►Figure 8.
Overview of Labour Migration Schemes in Japan



Source: This figure is adapted from the Japanese Immigration Service Agency¹⁰⁷

The SSWV scheme, introduced to address Japan's acute and growing labour shortage, differs significantly from the Technical Intern Training Programme (TITP) established in 1993. While the SSWV aims to facilitate the entry of foreign workers to offset labour shortages, the TITP focuses on enabling professionals from developing countries to acquire necessary skills through temporary work in Japan. Despite differing purposes, both programmes share commonalities in processes and systems.

Social Protection Mechanisms for Migrant Workers in Japan

Japan has not ratified the United Nations International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families. However, Japan has signed the ILO's Private Employment Agencies Convention 181 to prevent exploitation through recruitment fees and committed to upholding migrant workers' rights. Japan's social protection system is primarily contribution-based, with social insurance serving as its foundation. Notably, short-term migrant workers contributing to the National Pension System or Employees' Pension Insurance System for at least six months can apply for a lump-sum withdrawal payment within two years of departure.

107. Japanese Immigration Services Agency. Initiatives to Accept Foreign Nationals and for the Realisation of Society of Harmonious Coexistence. <https://www.moj.go.jp/isa/content/930004452.pdf>

Japan has established transnational social protection mechanisms, such as its bilateral social security agreement with India, ensuring portability of old-age, disability, and survivors' pensions, as well as administrative coordination.

Depiction of Skills Shortages by Level per Sector / Occupation in Japan

Japan utilizes the Japan Standard Occupational Classification (JSOC), to categorize occupations. Although the JSOC does not explicitly classify workers by skill level, it distinguishes occupations based on type and nature of work. The JSOC employs a classification structure and general principles to acknowledge skill level differences. Specifically, each occupation requires distinct knowledge and skills to perform effectively. The classification framework implicitly considers skill levels through occupational categorization.

►Table 11.
Japanese Occupational Classification System¹⁰⁸

Major group	Minor group	Unit group
A – Administrative and managerial workers	4	10
B – Professional and engineering workers	20	91
C – Clerical workers	7	26
D – Sales workers	3	19
E – Service workers	8	32
F – Security workers	3	11
G – Agriculture, forestry and fishery workers	3	12
H – Manufacturing process workers	11	69
I – Transport and machine operation workers	5	22
J – Construction and mining workers	5	22
K – Carrying, cleaning, packaging, and related workers	4	14
L – Workers not classifiable by occupation	1	1
Total: 12	74	329

Source: The table is adapted from the Japan Standard Occupational Classification

In this detailed occupational classification system, each letter corresponds to a major group, further divided into numbered minor and unit groups. This extensive classification encompasses hundreds of specific occupations, describing tasks, qualifications, and duties necessary for each.¹⁰⁹ By examining these classifications, required skill levels can be inferred.

108. General Principles for the Japan Standard Occupational Classification. Accessed 15 February 2024 https://www.soumu.go.jp/english/dgpp_ss/seido/shokgyou/co09-2.htm

109. Structures and Explanatory Notes. Accessed 15 February 2024, https://www.soumu.go.jp/english/dgpp_ss/seido/shokgyou/co09-4.htm

Japan's labour market faces significant challenges due to its demographic features, including an ageing population, reduced female workforce participation, and a plateauing labour force. These factors have led to severe labour shortages. According to a study by Recruit Works, Japan will face a labour shortage of 11 million people across its key sectors, such as services, nursing care, customer service, construction, and logistics, by 2040.¹¹⁰

Furthermore, surplus labour has halved in the past two decades, with only a 1-2% change in the potential labour force participation rate.¹¹¹ A 2018 survey found that 50.9% of Japanese firms reported full-time employee shortages.¹¹² Severe labour market shortages exist in various sectors, including information services, agriculture/forestry/fisheries sector, warehouse/transportation sector, maintenance/security/inspection, and construction.¹¹³ The service industry is particularly affected, with higher labour shortages in hospitality, retail, food and beverages, human resources, security, maintenance, and entertainment. Projections indicate that significant labour shortages will persist by 2040, concentrated in the service industry, particularly in caregiving services, sales and merchandising, transportation, machine operation, and shipping.

According to a Recruit Works Study published in March 2023, Japan is projected to face significant labour shortages in eight key sectors by 2040, as summarized in Table 12 and illustrated in Figure 9.¹¹⁴ These sectors will experience substantial labour gaps, particularly in the service industry, including caregiving services, sales and merchandising, transportation, machine operation, and shipping. Furthermore, job vacancies in clerical tasks, technical occupations, specialist positions, manufacturing, and sales and merchandising are expected to have the highest labour shortages in general.

► **Table 12.**
Key Sectors in Japan with Labour Shortages

Sectors	Qualifications	Labour Shortages by 2030	Labour Shortages by 2040	Labour Shortages Compared to Labour Demand in 2040 (Percentage)
Transportation, Machine Operation, Shipping Industries	Medium Skill	379,000	998,000	24.2%
Construction	Low-Medium Skill	223,000	657,000	22%
Manufacturing	Medium Skill	221,000	1,124,000	13.3%
Sales and Merchandising	Low Skill	402,000	1,089,000	24.8%
Caregiving Services	Low-Medium Skill	210,000	580,000	25.3%
Customer and Food Service Preparation	Low Skill	179,000	566,000	15.1%
Health Care and Medical Industries	Medium-High Skill	186,000	816,000	17.5%
Clerical Tasks, Technicians, and Specialists	Medium-High Skill	213,000	1,566,000	6.8%

Note: This table is adapted from Recruit Works¹¹⁵

110. Recruit, 'Works Report 2023 - Forecast 2040', accessed 5 December 2023, https://www.works-i.com/english/item/FuturePredictions2040_JP.pdf

111. Shinichi Nishioka, 'Severe Labour Shortage Puts Upward Pressure on Wages in Japan -Stagnant Labor Participation Rate May Lead to the Unemployment Rate Falling below 2%', JRI Research Journal 6, no. 3 (January 2023), <https://www.jri.co.jp/en/MediaLibrary/file/english/periodical/jrirj/2023/01/nishioka.pdf>.

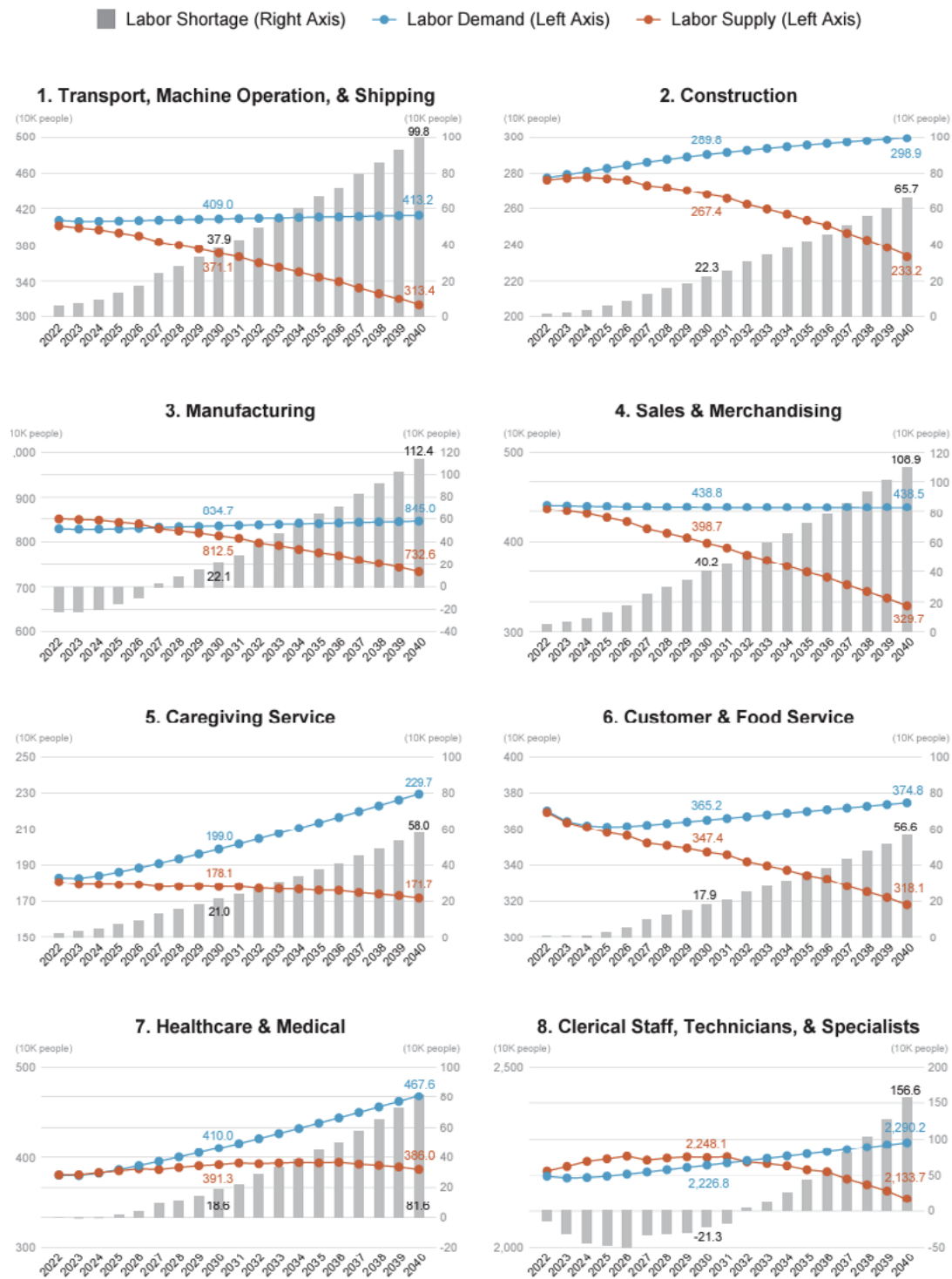
112. TDB, 'Special Report: Survey of Companies' Attitudes towards Labour Shortages (July 2018)', August 2018, <https://www.tdb.co.jp/report/watching/press/pdf/p180806.pdf>

113. TDB, 'Special Report: Survey of Companies' Attitudes towards Labour Shortages (July 2018)', August 2018, <https://www.tdb.co.jp/report/watching/press/pdf/p180806.pdf>

114. Recruit Works 'Report 2023 - Forecast 2040', accessed 5 December 2023, <https://www.works-i.com/research/works-report/item/forecast2040.pdf>.

115. Recruit, 'Works Report 2023 - Forecast 2040', accessed 5 December 2023, <https://www.works-i.com/research/works-report/item/forecast2040.pdf>.

► **Figure 9.**
2040 Predictions for Sectors with Labour Shortages in Japan



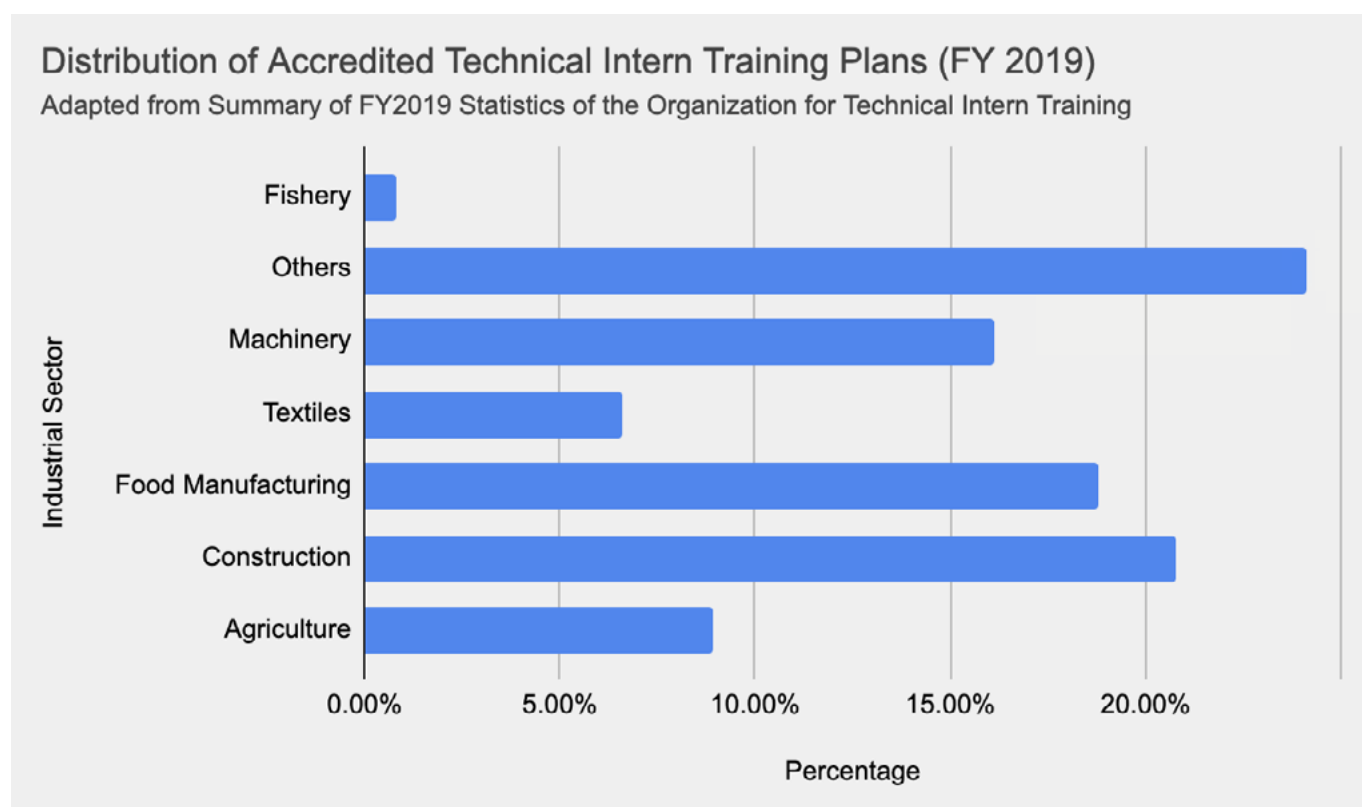
Note: This table is adapted from Recruit Works ¹¹⁶

116. Recruit, 'Works Report 2023 - Forecast 2040', accessed 5 December 2023, <https://www.works-i.com/research/works-report/item/forecast2040.pdf>.

As of April 2022, Japan's Technical Intern Training Programme comprise 158 occupations across 86 job categories (Figure 10).¹¹⁷ The programme's participants are primarily employed in sectors such as agriculture, fishery, construction, food manufacturing, textile, machinery. In addition, migrant trainees are also engaged in various other sectors, including furniture making, printing and bookbinding, plastic moulding, painting and welding, industrial packaging, carton box and corrugated cardboard manufacturing, pottery production, automobile repair and maintenance, building cleaning, care work, linen supply, concrete product manufacturing, and lodging.¹¹⁸ The TITP thus plays a vital role in facilitating labour migration to these diverse sectors, which are essential for Japan's economic growth.

►Figure 10.

Distribution of Accredited Technical Intern Training Plans (Financial Year 2019)



Source: The figure is adopted from the Summary of FY2019 Statistics of the Organization for Technical Intern Training ¹¹⁹

117. Global Skill Partnerships. (2022). Technical Intern Training Program (TITP) - Global Skill Partnerships. [online] Available at: <https://gsp.cgdev.org/legalpathway/technical-intern-training-program-titp>.

118. Otis.go.jp. 'Summary of FY2019 Statistics of the Organization for Technical Intern Training', 2020. <https://www.otit.go.jp/files/user/statistics/201026-3.pdf>.

119. Otis.go.jp. 'Summary of FY2019 Statistics of the Organization for Technical Intern Training', 2020. <https://www.otit.go.jp/files/user/statistics/201026-3.pdf>.

Classification of Sectors / Occupations Migrant Workers Hired

Migrant workers in Japan are employed in various critical occupations essential for the country's economic growth and development. These key occupations require medium to high levels of skills and qualifications, including accountants, tax professionals, managers and external/internal auditors, electrical, civil, structural geotechnical, and transportation engineers, software and applications programmers, ICT security specialists, and chefs. Most migrant workers in Japan are skilled migrants, primarily from 16 Asian countries with which the Japanese government has bilateral labour migration agreements.

Japan's labour migration policy prioritizes skilled workers, aligning with the country's specific labour market needs. Notably, low-skilled migrant workers are generally not sought after, except for migrants of Japanese origin returning from Latin America or other regions. Since 1993, Japan has operated the TITP, which aims to provide skills training to foreign nations.¹²⁰ Initially designed as a development aid programme, TITP's primary purpose was to contribute to human capacity development in developing countries. The programme attracts talented young individuals from developing countries to learn about Japan's advanced technologies and knowledge. Key requirements for TITP participants include proficiency in the Japanese language, as technical training lectures are conducted in Japanese.

The objective was for these individuals to acquire valuable skills and subsequently return to their countries of origin, where they could utilize their newly acquired knowledge to contribute to national development. Currently, approximately 325,000 foreign trainees, mainly from Vietnam, Indonesia, and the Philippines, participate in TITP.¹²¹ While primarily open to Asian countries, the programme is also accessible to participants from other parts of Asia.

Upon completing their technical training, many participants opt to remain in Japan, integrating into the domestic labour workforce. They secure employment in diverse sectors, including healthcare, agriculture, fishery, construction, food manufacturing, textiles, plastic moulding, welding, industrial packaging, carton box and corrugated cardboard production, industrial manufacturing, pottery production, automobile repair and maintenance. This transition to Japan's workforce diversity, addresses potential labour shortages. However, technical training graduates can stay and work in Japan for a limited period, up to 5 years.¹²²

Japan's migrant labour workforce is predominantly Asian (84%), comprising Chinese, Vietnamese, South Korean, Filipino and Nepalese nationals, among others. This is largely due to existing Bilateral Labour Migration Agreements (BLMAs) between Japan and these countries. Migrants from South America account for 8.9% of foreign residents, while those from Africa represent a relatively small share in Japan accounting for only 0.67% of all foreign residents.

An analysis of labour migrant data, as illustrated in Figure 11, reveals that the largest proportion of foreign residents in Japan are participants in the Technical Intern Training Programme (TITP). The remaining foreign residents are primarily employed in technology sectors, humanities and international affairs, international students, and family visit visa holders.

According to Dr. Keiko Yamanaka, a renowned expert on migrant labour in Japan, international student visas serve as a significant entry point for migrants seeking to integrate into the Japanese labour market.¹²³ Dr. Yamanaka further noted that foreign residents in Japan are employed in various occupations, including teaching, academic professorship, medical professions, engineering (high-tech companies), accounting and business management.

120. 'Technical Intern Training Program (TITP)', Global Skill Partnerships, 7 July 2021, <https://gsp.cgdev.org/legalpathway/technical-intern-training-program-titp/>.

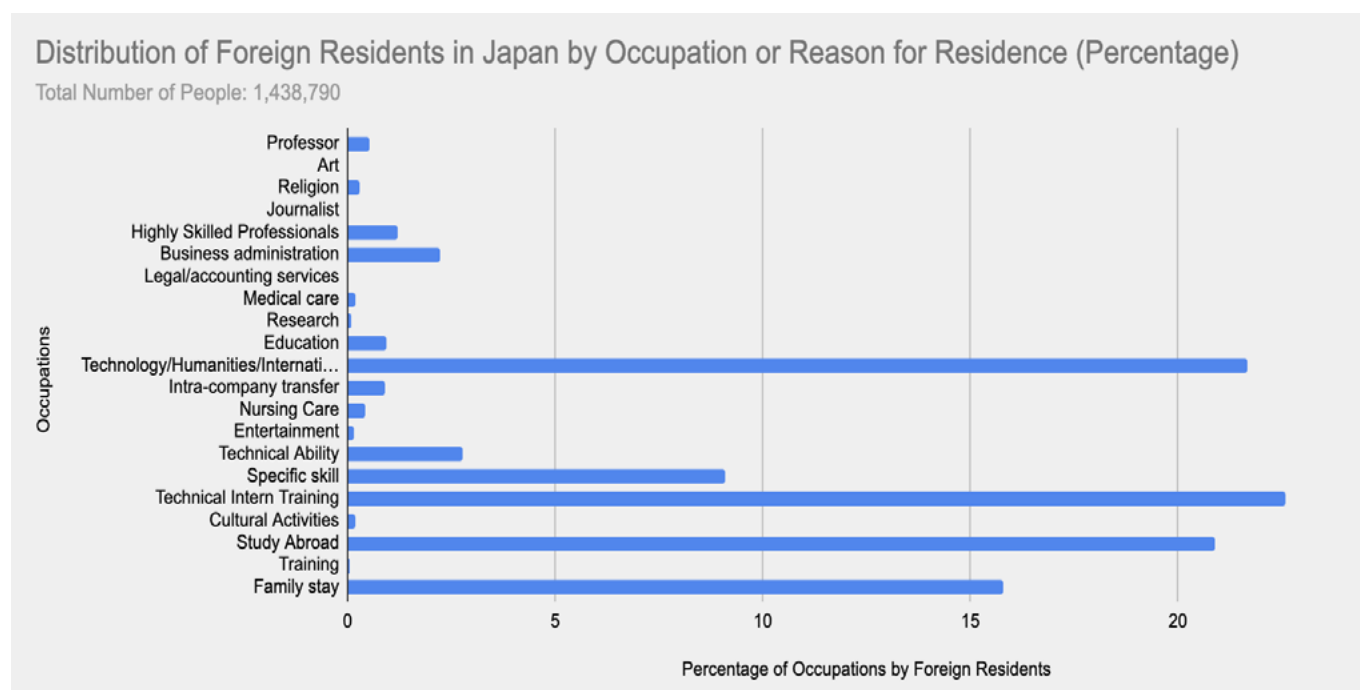
121. Anika Osaki Exum (2023). Japan panel compiles new system for foreign technical interns. [online] The Japan Times. Available at: <https://www.japantimes.co.jp/news/2023/10/18/japan/society/foreign-trainees-draft-report/>.

122. Global Skills Partnership, Technical Intern Training Program (TITP), <https://gsp.cgdev.org/legalpathway/technical-intern-training-program-titp/>

123. The interview with Dr. Keiko Yamanaka was conducted via Zoom on September 9th, 2023.

► Figure 11.

Distribution of Foreign Residents in Japan, by Occupation or Reason for Stay



Source: The data is adopted from the Japanese Immigration Services Agency, December 2022 ¹²⁴

Labour Migration Partnerships: Japan's Bilateral Agreements

Japan has established labour migration partnerships with 16 Asian countries through non-binding bilateral agreements, facilitating cooperation on labour migration matters. These partnerships enable the hiring of migrant workers from countries of origin for "specified skilled worker (I)"¹²⁵ occupations in 14 sectors facing labour workforce shortages. The bilateral agreements, while not explicitly skills-based, aim to promote orderly labour migration. However, available data does not provide a breakdown of migrant workers by country of origin, sector, or occupation.

The Government of Japan has signed MoUs with 16 Asian governments (Table 13.) These MoUs establish similar guidelines across countries, outlining shared responsibilities for information sharing on recruitment, sending process as well as the receiving and residency processes, bilateral cooperation on international labour mobility, reducing exploitation by malicious intermediary organisations, skills and language proficiency exams before departure to Japan, human rights protection and cooperation. Other responsibilities include providing information to potential migrant workers and ensuring proper remuneration under employment law.

124. 'Statistical Table of Foreign Resident Statistics', Moj.go.jp, accessed 5 December 2023, https://www.moj.go.jp/isa/policies/statistics/toukei_ichiran_touroku.html?hl=de.

125. Sri Lanka Embassy Japan. (2024). Specified Skilled Worker Program - The Embassy of Sri Lanka in Japan. [online] Available at: https://www.slembassyjapan.com/specified_skilled_worker_program

The MoUs aim to institutionalize cooperation between Japan and sending countries to protect migrant workers. Additionally, the Government of Japan has established MoCs with sending countries to facilitate the employment of Specialized Skills Workers. The MoCs specify procedures for dispatching SSWs, aligned with each sending country's domestic regulations. However, they do not provide information on the nature, quality, and quantity of potential labour migrants, organization, selection, and recruitment processes, institutions and agencies involved in each country.

►Table 13.

Bilateral Agreements and Memoranda of Cooperation between Japan and Countries of Origin for Labour Mobility Cooperation for Specified Skilled Workers¹²⁶

Country	Month, Year of Agreement	Sending Agency
Philippines	March 2019	The Department of Labor and Employment of the Republic of the Philippines
Cambodia	March 2019	The Ministry of Labour and Vocational Training of the Kingdom of Cambodia
Nepal	March 2019	Ministry of Labour, Employment, and Social Security of the Government of Nepal
Myanmar	March 2019	The Ministry of Labour, Immigration, and Population of the Republic of the Union of Myanmar
Mongolia	April 2019	Ministry of Labour and Social Protection
Sri Lanka	June 2019	Ministry of Telecommunication, Foreign Employment, and Sports of Sri Lanka
Indonesia	June 2019	Government of the Republic of Indonesia
Vietnam	May 2019	Ministry of Labour, Invalids, and Social Affairs of Vietnam
Bangladesh	August 2019	Ministry of Expatriates; Welfare and Overseas Employment of the People's Republic of Bangladesh
Uzbekistan	December 2019	Ministry of Employment and Labour Relations of the Republic of Uzbekistan
Pakistan	December 2019	Ministry of Overseas Pakistanis and Human Resource Development of Pakistan
Thailand	February 2020	Ministry of Labour of the Kingdom of Thailand
India	January 2021	Government of the Republic of India
Malaysia	May 2022	Government of Malaysia
Laos	July 2022	The Ministry of Labour and Social Welfare of the Lao People's Democratic Republic
Kyrgyzstan	June 2023	The Ministry of Labour, Social Security, and Migration of the Kyrgyz Republic

Key Stakeholders

In Japan, several stakeholders at central and regional levels are involved in managing orderly labour migration. The governmental Immigration Services Agency, along with the Regional Immigration Services Bureau, supplies visas for migrant workers. The Ministry of Health, Labour, and Welfare, Ministry of Agriculture, Forestry, and Fisheries, and Ministry of Economy, Trade, and Industry are essential governmental partners managing the labour force integration of foreign workers. At the regional level, Public Employment Security Offices (Hello Work) facilitate contact with the labour market for migrants and citizens alike. Japan International Cooperation Agency (JICA) also plays a crucial role in supporting labour migration management, skills development of migrants both

126. 'Bilateral Memorandum of Cooperation Regarding Specific Skills', Immigration Services Agency, accessed 5 December 2023, https://www.moj.go.jp/isa/policies/ssw/nyuukokukanri05_00021.html.

pre- and post-departure to and from Japan, and advocacy of migrant worker rights through the establishment of the 2020 “Japan Platform for Migrant Workers toward Responsible and Inclusive Society”.¹²⁷ The Organization for Technical Intern Training manages the flow and oversees technical intern applicants before their arrival and during their residence in Japan. Public organizations such as the Japan International Trainee & Skilled Worker Cooperation Organization provide support services in the form of training to other stakeholders, particularly the Organization for Technical Intern Training, as well as sending organizations in countries of origin.

Conclusion

Unlike Canada and Australia, Japan’s migration trajectory has been distinct, transitioning from a labour migration-exporting country to an immigration country over the past several decades. This shift is attributed to the country’s rapid economic growth, industrialization, and demographic changes, resulting in labour shortages.

In response, the Japanese government has implemented a labour migration policy, opening pathways for migrants to enter and work in the country. However, Japan’s institutional experience in managing, recruiting, and handling migrant workers remains limited compared to Canada and Australia. Japan’s homogeneous society and limited exposure to foreign migrants, particularly from Africa, present additional challenges. The Japanese language requirement also poses a significant obstacle for potential migrant workers, as communication with employers who may not speak English is essential.

Despite these challenges, Japan’s demographic trends necessitate increased labour migration. With a projected population decline of nearly 40 million people (approximately one-third of its current population) over the next 50 years, and a labour shortage of 11 million people by 2040, key sectors such as nursing care and home care, IT, agriculture, forestry, and fisheries, warehouse and transportation management, maintenance and machine operation, construction will require substantial migrant worker influxes. To address these needs, Japan prefers migrants with specialized technical skills, aligning with the requirements outlined under the Specified Skilled Worker (I) and Specified Skilled Worker (II) categories.

Notably, Japan has established labour migration partnerships with 16 Asian countries which currently supply migrant workers with various skill levels to the country.

Japan’s Technical Intern Training Programme (TITP) stands out as a unique initiative among destination countries, aimed at providing skills training and human capacity development to foreign nationals from developing countries. This programme has the potential to serve as a gateway for skills-based labour migration partnerships between Japan and countries of origin.

The TITP operates by sending talented young individuals from participating countries to Japan for technical intern training, followed by employment opportunities in Japan upon completion of the programme. This initiative can be integrated into existing bilateral cooperation programmes, currently implemented by the Japan International Cooperation Agency (JICA) in countries of origin.

Through the TITP, Japan can foster skills development and capacity building in partner countries while addressing its own labour market needs. This synergy can strengthen bilateral cooperation and facilitate mutually beneficial labour migration.

127. The main purpose of the “Japan Platform for Migrant Workers towards Responsible and Inclusive Society” is to promote inclusive economic growth and sustainable development of the society. By cooperating with stakeholders to protect the rights of foreign workers, and improve their working and living condition, we aim to accept foreign workers responsibly, and make Japan a chosen destination to work. More information here: jp-mirai.org

► 5. The Case of South Korea

Labour Market Trends

Between 1982 and 2023, South Korea's labour force participation rate averaged 61.20%, peaking at 65.3% in May 2023.¹²⁸ The annual unemployment rate in 2023 was 2.7%, the lowest since 2000, and it declined for three consecutive years following the COVID-19 pandemic.¹²⁹ South Korea's main drivers of economic growth include healthcare, industrial chemicals, information technology, semiconductor manufacturing, aerospace and defence, energy, environmental technology, transportation, and shipbuilding (US International Trade Association).¹³⁰ The service sector, comprising department stores and supermarkets, dominates the economy, accounting for 57% of GDP and engaging 70.2% of the workforce.¹³¹ According to a 2023 World Bank report, the services sector in Eastern Asia and the Pacific is a reliable contributor to overall labour productivity growth.¹³²

Legal Mobility Partnerships: Legal Frameworks

South Korea has established legal and institutional frameworks to govern the recruitment of migrant workers. The Employment Permit System (EPS) is the primary instrument implementing labour migration policy.¹³³ The EPS comprises two main windows, General Employment Permit Visa (GEPV) programme (E-9 visas) for foreign workers and the Working Visit Visa programme (H-2 visas) for overseas Koreans.¹³⁴ Table 14 compares these two visa procedures. The General Employment Permit programme allows foreign workers from 16 Asian countries with manpower supply agreements to take temporary employment in Korea.¹³⁵

The GEPVs (E-9) are issued for selected workers to stay up to 3 years (with a possible 22-month extension). Employment contracts are renewed annually. The E-9 Employment Permit Visa system is a formal mechanism that enables employers to recruit foreign labour after exhausting local hiring options. The system involves structured procedures and considerations to safeguard local employment opportunities.

128. TRADING ECONOMICS, "South Korea Labor Force Participation Rate," n.d., <https://tradingeconomics.com/south-korea/labor-force-participation-rate>.

129. TRADING ECONOMICS, "South Korea Unemployment Rate," n.d., <https://tradingeconomics.com/south-korea/unemployment-rate>.

130. "South Korea - Market Overview," International Trade Administration | Trade.gov, n.d., <https://www.trade.gov/country-commercial-guides/south-korea-market-overview>.

131. The Economic Context of South Korea - International Trade Portal," n.d., <https://www.lloydsbanktrade.com/en/market-potential/south-korea/economical-context>.

132. World Bank, "East Asia and the Pacific Economic Update October 2023 - Services for Development," World Bank, n.d., (pp.25) <http://documents.worldbank.org/curated/en/099092923135515050/P5006660e01f7f06d0b3450d0dbfd1a523a>.

133. The government of Korea developed this labour policy instrument as a response to a growing labour market needs as well as a demand by certain sections of the business community in the country.

134. Jung-Eun Oh-Dong Kwan Kang-Julia Jiwon Shin-Sang-lim Lee-Seung Bok Lee-Kiseon Chung. (2011). Migration Profile of the Republic of Korea. International Organization of Migration. https://publications.iom.int/system/files/pdf/mp_korea.pdf

135. EPS agreement countries: Bangladesh, Cambodia, China, East Timor, Indonesia, Kyrgyzstan, Mongolia, Myanmar, Nepal, Pakistan, Sri Lanka, Thailand, the Philippines, Uzbekistan and Vietnam

The E-9 Visa Process in South Korea comprises the following key components:

- **Employer Request:** Employers facing difficulties in hiring local workers for specific job openings can submit formal requests for a work permit to recognized organizations, such as the Korean Federation of Small and Medium-sized Businesses (KFSMB) or district employment support centres.
- **Work Permit Issuance:** Upon approval, employers can recruit workers directly or through designated public institutions or non-profit organizations.
- **Recruitment Procedures:** Employers must adhere to specific recruitment procedures including posting job openings on Work-Net, a recognized job-matching platform, observing a minimum 10-day waiting period (or 7 days in exceptional circumstances). Under exceptional circumstances, the waiting period may be reduced to 7 days provided that employers have demonstrably endeavoured to recruit local workers through diverse publications and channels.
- **E-9 Workers:** The E-9 worker population in South Korea has grown steadily, from 52,000 in 2021 to 69,000 in 2022 and 120,000 in 2023, constituting a significant segment of registered foreign workers.¹³⁶ The E-9 visa category serves diverse industries and sectors, playing a primary role in foreign labour intake.

The E-9 Employment Permit visa system constitutes a distinct category, separate from other visa classes. Specifically, it applies to foreign workers arriving in South Korea from countries outside China, the former Soviet Union, as well as ethnic Koreans potentially eligible for specialized benefits under the Working Visit Visa (H-2) program. The E-9 system aims to balance labour market needs by addressing shortages while safeguarding employment opportunities for local workers in South Korea. Table 14 provides a comparative overview of the E-9 Employment Permit visa system and the Working Visit Visa.

► **Table 14.**
Comparison Between Korean E-9 Visa and H2-Visa¹³⁷

Criteria	E-9 Visa	H-2 Visa
Duration of Stay	3 years (1-time extension is permitted for a period of fewer than 22 months; May work for up to 3 years from the date of entry)	3 years; May work for up to 3 years from the date of entry [worker may be rehired upon request from their employer]
Eligibility Requirements	Individuals registered on the EPS roster after passing the Test of Proficiency in Korean (TOPIK) and completing a medical exam	- Overseas Koreans with relatives who are Korean nationals or listed in the Korean family registry. (No quota restrictions. Each Korean national can invite over 3 overseas Koreans.) - Overseas Koreans without relatives who are Korean nationals (Quota restrictions)
Permitted Occupations	Occupations permitted in the Foreign Workforce Policy Committee in the following sectors: manufacturing, construction, service, agriculture/livestock, fisheries	Occupations under the E-9 Visa plus certain service occupations.
Employment Procedure	Korean proficiency test; signing of labour contract; entry into Korea with Non-Professional Employment (E-9) visa; Employment training; Begin work (restrictions on change of workplace)	- Entry into Korea with a Working Visit (H-2) visa. Employment Training, Job Search (assistance available from the Employment Support Centre) - Begin work after signing labour contract (no restrictions for changing workplace)

136. Michael Herh, (2023). Korean Government to Allow More Foreign Workers with E-9 Visas in 2024, <https://www.business-korea.co.kr/news/articleView.html?idxno=206585>.

137. IOM Migration profile of the Republic of Korea (January 2012). Pages: 20-21

Criteria	E-9 Visa	H-2 Visa
Recruitment Procedure	The effort to recruit Korean workers; Application for employment permits submitted to the Employment Support Centre; Issuance of Employment Permits; Hiring of Workers After Signing of Employment Contracts (no obligations to report the start of work)	- Effort to recruit Korean workers->Request filed with the Employment Support Centre for certificate of permission for special employment - Hiring of workers after signing the employment contract (required to report the start of work)
Permitted Number of Employees per Workplace	Limits placed on the number of foreign employees per workplace based on the size of the business	Permitted Number of E-9 workers based on the size of business plus the same number of Working Visit (H-2) workers (excluding construction and service sectors)

South Korea's growing demand for migrant workers stems from a combination of factors, including rapid industrialization and distinct demographic characteristics. Despite various policies that have been implemented to attract and manage migrant workers since the 1990s, persistent labour shortages persist. A United Nations report highlights the magnitude of this challenge, estimating that South Korea needs to import approximately 100,000 workers annually.

Between 2030 and 2050, the country is projected to require a total of 1.5 million migrant workers to sustain its economic structure and support its ageing population.¹³⁸ This forecast indicates that the influx of migrant workers necessary to offset labour shortages will continue to grow. The increasing presence of migrant workers will have far-reaching implications for Korean society, impacting not only the economy but also social, political, and cultural dynamics.

Social Protection Mechanisms for Migrant Workers in South Korea

Although South Korea has not ratified the United Nations International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, its Employment Permit System initiated in 2004 guarantees certain rights for foreign workers. These rights include access to wages, national health insurance, and redress against employers in case of discrimination. Additionally, migrant workers are eligible for industrial accident compensation insurance regardless of their legal migration status. However, concerns persist regarding the implementation and adherence to non-discriminatory practices towards foreign workers, as highlighted in a 2014 Amnesty International report.¹³⁹ Under the EPS system, migrant workers face difficulties changing jobs without employer permission and official registration of discrimination or health issues.

Skills Shortages by Sector / Occupation in South Korea

South Korea's labour market faces skills shortages across various sectors and occupations. The Korean Standard Classification of Occupations (KSCO), provides a framework for understanding these shortages. Notably, the KSCO is similar to Japan's occupational classification system, as it categorizes occupations based on tasks, responsibilities, and qualifications rather than skill levels.

The KSCO is a five-level hierarchical structure, categorizing jobs into 1,231 detailed occupational groupings derived from: 450-unit groups, 156 minor groups, 52 sub-major groups, and 10 major groups.¹⁴⁰ This classification system, based on the International Standard Classification of Occupations adopted by the ILO, is revised every five years, with a new revision planned for 2024.

138. Seol, Dong-hoon and Han Geon-soo (2004), 'Foreign Migrant Workers and Social Discrimination in Korea', in: Harvard Asia Quarterly, 8 (1), pp. 45-50

139. Robinson, F. (2014). Amnesty International: South Korea Abuses Migrant Workers. [online] Voice of America. Available at: <https://www.voanews.com/a/amnesty-international-south-korea-abuses-migrant-workers/2489377.html>

140. The Introduction page of Korean Standard Classification of Occupations, Statistics Korea. Accessed on 15 February 2024 http://kssc.kostat.go.kr/ksscNew_web/ekssc/common/selectIntroduce.do?part=2&top_menu=101&bbsId=isco_s&categoryNameCode=030&categoryMenu=001#

South Korea's expanding economy and rising per capita income since the 1980s have driven a shift towards high-paying occupations in information and communication technology (ICT), science, and technology. Consequently, shortages have emerged in low-paid service industries, particularly food services, business services, and retail services. An ageing workforce exacerbates these structural changes. According to the 2018 OECD Economic Surveys, over 80% of SMEs report labour shortages; meanwhile, vocational high school enrolment has declined to 19%.¹⁴¹ Despite accounting for more than 80% of employment in Korea, SMEs often pay low wages for low-skilled and non-regular jobs.¹⁴²

An OECD study (2009-2019) reveals that in-demand occupations span all skill and wage levels, focusing on low and medium-skilled labour.¹⁴³

These include social work, home care, food service, agriculture-related, health care professionals, retail and wholesale sales construction, plastic production, scientific and technical clerks and professionals, ICT professionals, and public administration clerks. The service industry dominates the most significantly growing occupations, including social work, public administration, telecommunications, food manufacturing, education, entertainment services, scientific services, technical services, business services, construction and automobile industries.

South Korea faces significant labour market challenges due to its rapidly ageing population. The demand for caregiving, health, and personal service workers is increasing, driven by the ageing demographics. This sector is projected to experience the greatest job growth, with an estimated 781,000 new jobs created between 2020 and 2030.¹⁴⁴ Other sectors expected to drive job growth include Information and Communication Technology, with 135,000 new jobs, and Professional, Scientific, and Technical Services with 115,000 new jobs. Figure 12 and 13, adapted from the Korea Employment Information Service's 2020 report, illustrate the top 10 industries/sectors with labour shortages and projected increases in employment in the coming decade.¹⁴⁵ Figure 13 highlights specific occupations projected to experience significant growth.

141. OECD. (2018). OECD Economic Surveys Korea <https://web-archive.oecd.org/2018-06-19/486564-Korea-2018-OECD-economic-survey-overview.pdf>

142. Troy Stangarone, 'Low Youth Employment in Korea Part 2: The Challenges of Labor and Product Market Dualism', Korea Economic Institute of America, 18 January 2023, <https://keia.org/the-peninsula/low-youth-employment-in-korea-part-2-the-challenges-of-labor-and-product-market-dualism/>.

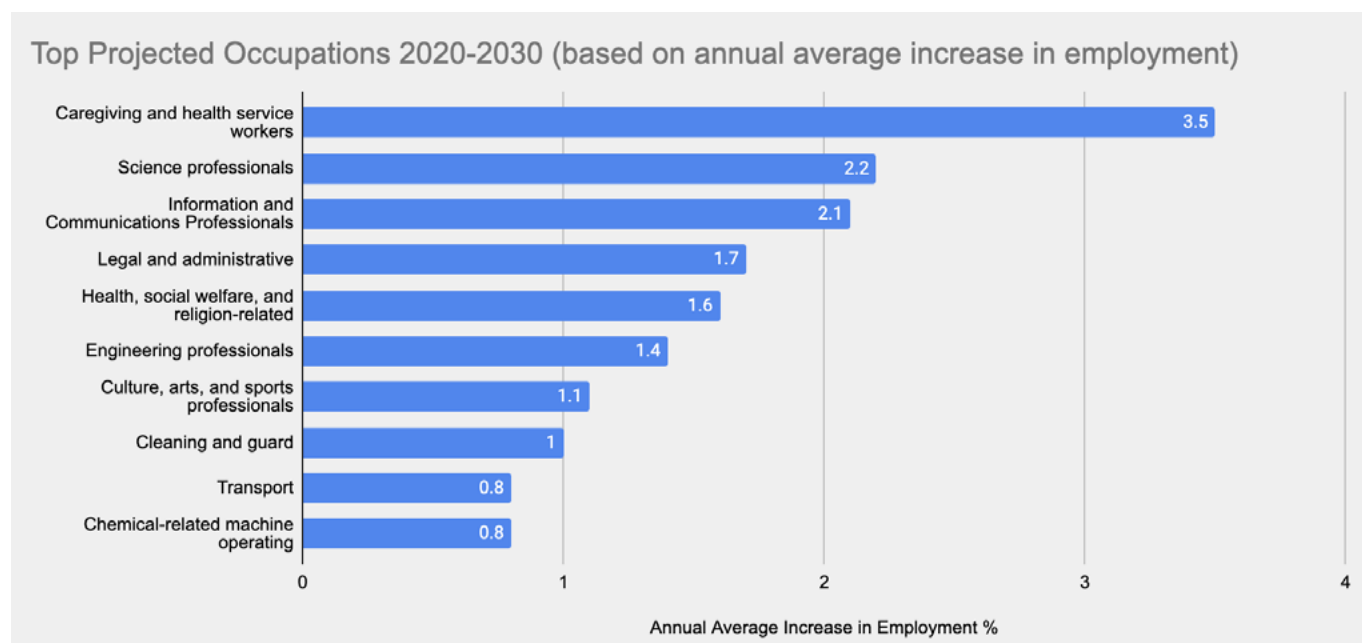
143. OECD. (2018). OECD Economic Surveys Korea <https://web-archive.oecd.org/2018-06-19/486564-Korea-2018-OECD-economic-survey-overview.pdf>

144. OECD (2019), Investing in Youth: Korea, Investing in Youth, OECD Publishing, Paris, <https://doi.org/10.1787/4bf4a6d2-en>.

145. Korea Employment Information Service. Medium- and Long-Term Labor Force and Employment Projections (2020-2030 Handbook). <https://www.keis.or.kr/user/extra/main/3874/publication/publicationList/jsp/LayoutPage.do?categoryIdx=131&pubIdx=9354&onlyList=N>

►Figure 12.

Top Projected Occupations (2020-2030) Based on Annual Average Employment



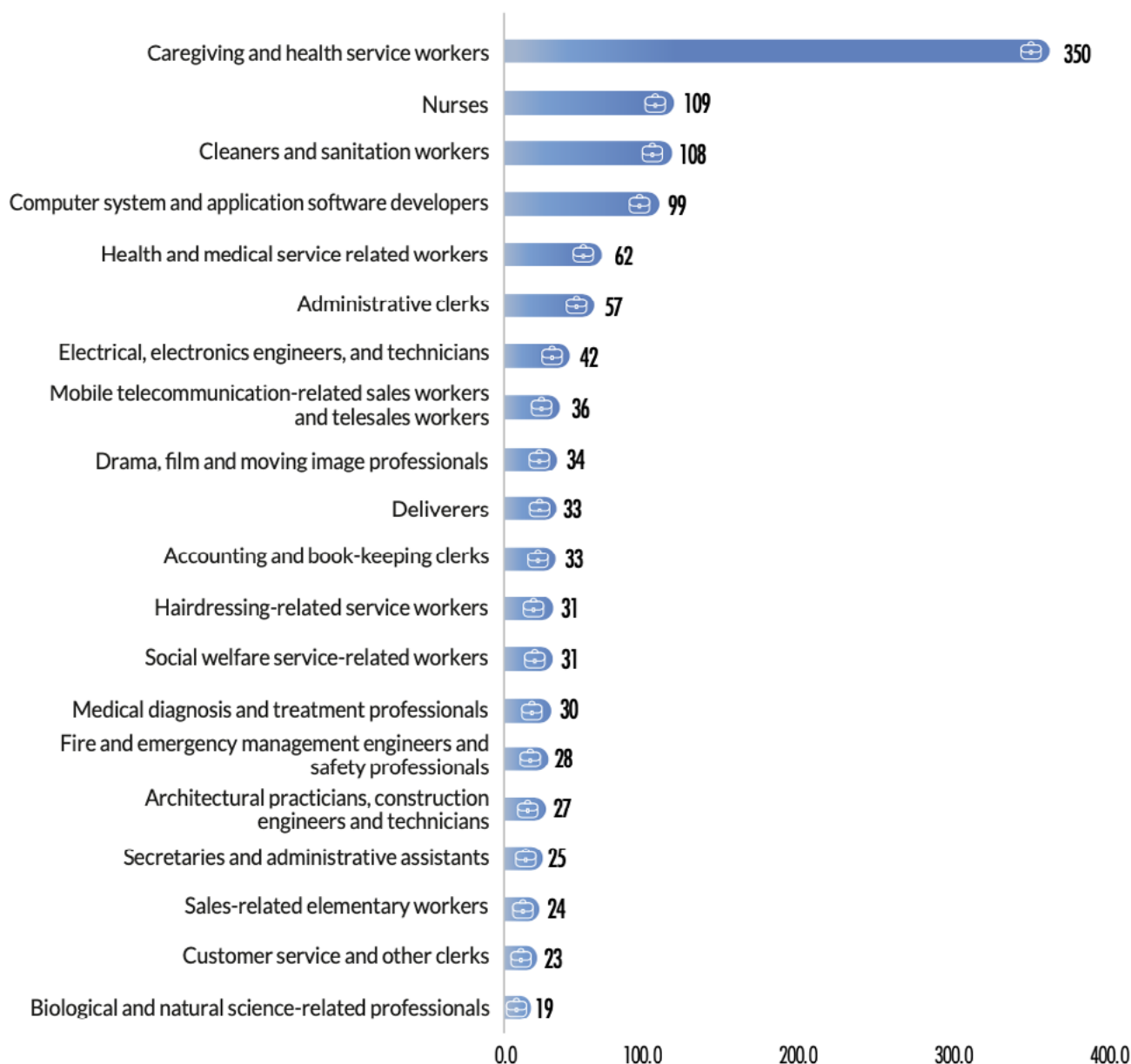
Source: Adapted from Korea Employment Information Service. Data from Statistics Korea, Economically Active Population Survey, Regional Employment Survey.¹⁴⁶

146. Korea Employment Information Service. Medium- and Long-Term Labor Force and Employment Projections (2020-2030 Handbook). <https://www.keis.or.kr/user/extra/main/3874/publication/publicationList/jsp/LayOutPage.do?categoryIdx=131&pubIdx=9354&onlyList=N>

►Figure 13.

Korea Employment Information Services: Projected Occupations with Greatest Increases in Employment (2020-2030)

(Unit: thousand persons)



Source: this figure is adapted from the Korean Employment Information Service¹⁴⁷

147. Korea Employment Information Service. Medium- and Long-Term Labor Force and Employment Projections (2020-2030 Handbook). <https://www.keis.or.kr/user/extra/main/3874/publication/publicationList/jsp/LayoutPage.do?categoryId=131&pubIdx=9354&onlyList=N>

Sectoral Distribution of Migrant Workers in South Korea

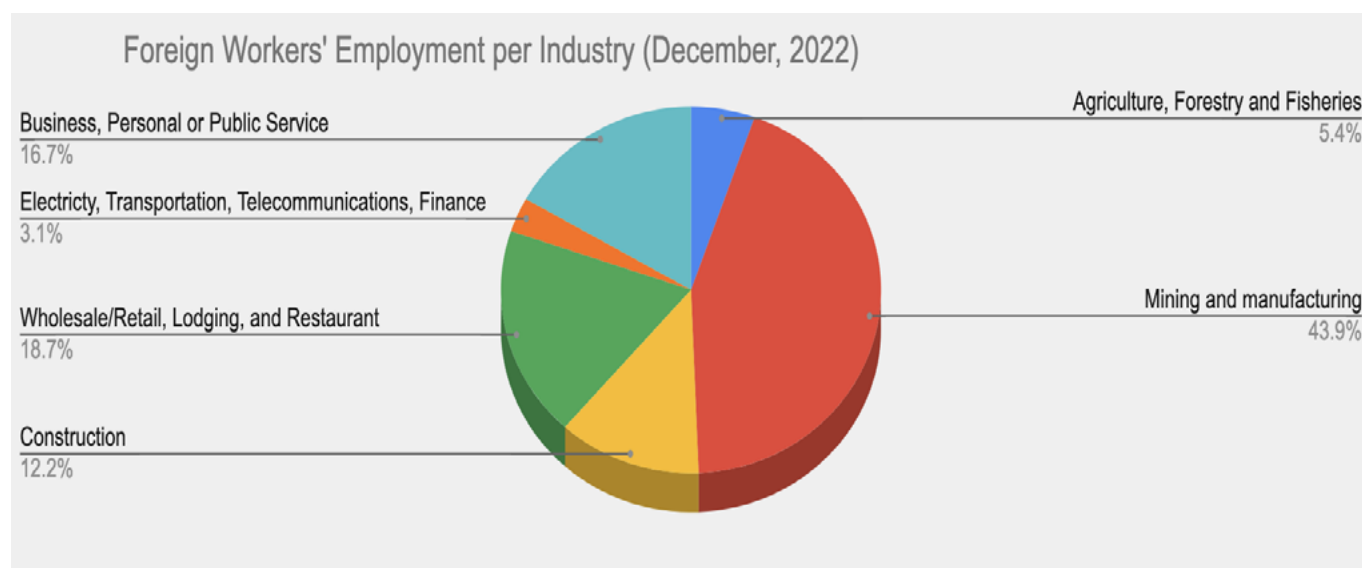
Migrant workers in South Korea are primarily employed in the mining and manufacturing industry, performing manual labour-intensive jobs. The wholesale/retail, lodging, restaurant, and service industries also employ a significant number of migrant workers. Additionally, the construction and agriculture, forestry, and fishery industries have a notable migrant worker presence.

South Korea's labour migration policy is implemented through the Employment Permit System. The government sets an annual quota for migrant workers and assigns them to specific industries, with manufacturing being the primary sector. In August 2022, the government increased the quota for foreign workers from 59,000 to 69,000. Of this new quota expansion, 75.4% was allocated to manufacturing jobs, 13.6% to agriculture/livestock, 6.8% to fisheries, and 4% to construction. The remaining 10% is allocated flexibly based on labour shortages in other industries.¹⁴⁸

Migrant Workers can be hired from any country regardless of existing bilateral labour migration agreements. Under the EPS, migrant workers must spend 25 hours in language and cultural orientation classes with a Korean instructor to improve their language abilities and learn about Korean culture, labour, and migration laws.¹⁴⁹

Figure 15 illustrates the distribution of foreign workers by occupation in South Korea. The most significant categories include machine operations and assemblies, as well as low-skilled manual labourers. This reflects the specific sectors that the labour market in South Korea needs and the types of occupations that migrant workers are typically hired for in the country.

► **Figure 14.**
Foreign Workers' Employment per Industry in Korea (December 2022)



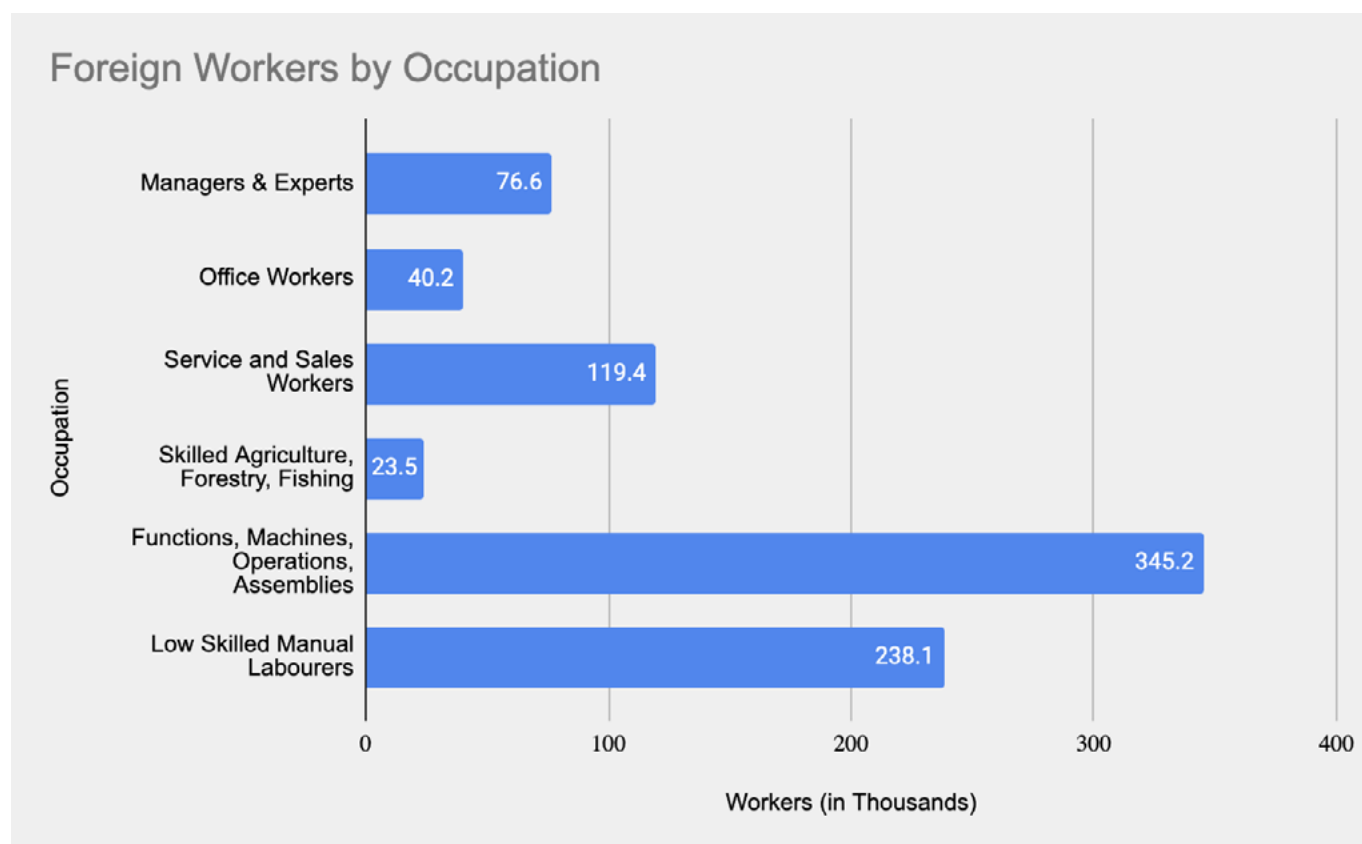
Source: The data is adapted from the Immigrant Status and Employment Survey 2022¹⁵⁰

148. Korean Ministry of Employment and Labour. 2022. 'Korea to Expand Foreign Workforce Quota under the Employment Permit System by 10,000' <https://www.moel.go.kr/english/news/moelNewsDetail.do?idx=3113>.

149. International Labor Organization. Pioneering a System of Migration Management in Asia. The Republic of Korea's Employment Permit System approach to decent work. https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/documents/publication/wcms_145630.pdf

150. KOSIS', Kosis.kr, accessed 5 December 2023, https://kosis.kr/statHtml/statHtml.do?orgId=101&tblId=DT_2FB017F&vw_cd=MT_ZTITLE&list_id=B1_z02_101_20&scrId=&seqNo=&lang_mode=ko&obj_var_id=&itm_id=&conn_path=MT_ZTITLE&path=%252FstatisticsList%252FstatisticsListIndex.do&orderBy=ASC.

► **Figure 15.**
Foreign Workers by Occupation in Korea (December 2022)



Source: The data is adapted from Korean Statistics, December 2022¹⁵¹

Labour Migration Partnerships in South Korea

The government of South Korea manages a temporary low-skilled labour migration programme through its EPS, which was established in 2004. The programme aims to address labour supply shortages, particularly in small and medium-sized enterprises (SMEs) and enhance international labour mobility cooperation.

South Korea has bilateral agreements with 16 Asian countries similar to Japan's arrangements.¹⁵² Although the contents of these agreements are not publicly disclosed, they do not specify binding annual quotas for foreign worker admission per country of origin.¹⁵³ The Foreign Workforce Policy Committee provides annual guidelines on admission quotas per sector and industry, with the manufacturing industry receiving the most workers through EPS.¹⁵⁴

151. KOSIS', Kosis.kr, accessed 5 December 2023, https://kosis.kr/statHtml/statHtml.do?orgId=101&tblId=DT_2FB017F&vw_cd=MT_ZTITLE&list_id=B1_z02_101_20&scrId=&seqNo=&lang_mode=ko&obj_var_id=&itm_id=&conn_path=MT_ZTITLE&path=%252FstatisticsList%252FstatisticsListIndex.do&orderBy=ASC.

152. OECD (2019), Recruiting Immigrant Workers: Korea 2019, Recruiting Immigrant Workers, OECD Publishing, Paris, <https://doi.org/10.1787/9789264307872-en>.

153. OECD (2019), Recruiting Immigrant Workers: Korea 2019, Recruiting Immigrant Workers, OECD Publishing, Paris, <https://doi.org/10.1787/9789264307872-en>

154. Ibid.

This programme allows SMEs in the manufacturing sector to hire migrant workers from selected countries of origin. To be eligible, potential migrant workers must be between 18 and 39 years old, have no criminal record, and possess basic Korean language skills.¹⁵⁵ Before arriving in Korea, migrant workers undergo a pre-employment education period lasting one to two and a half weeks. Upon arrival, they attend a 16-hour (3-day) education session. Since 2008, approximately 10% of employers with more than five employees have hired foreign workers.¹⁵⁶ As of 2022, 276,000 migrant workers held E-9 visas, issued under the General Employment Permit.¹⁵⁷

Under the EPS, migrant workers can stay in Korea for three years based on their work contracts, falling into two categories: non-professional (low-medium skill labour) and professional category (highly skilled occupations). According to 2022 data, non-professional employment was the second-largest category of economically active foreigners, following overseas ethnic Korean foreigners.¹⁵⁸ Most foreign workers in Korea hold low-skilled occupations in functional, operational, machine, and assembly-related jobs or low-skilled manual labour positions.

►Table 15

Bilateral Agreements and Memoranda of Understanding between Korea and Countries of Origin for Labour Migration under the Employment Permit System

Country	Year of agreement	Share of total present, 2016 (%)	Sending agency
Indonesia	2004	11.5	National Board for the Placement and Protection of Indonesian Overseas Workers
Mongolia	2004	3.5	The Labor and Social Welfare Service Office
Sri Lanka	2004	8.6	Sri Lanka Bureau of Foreign Employment
Thailand	2004	9.1	Department Of Employment
Philippines	2004	9.4	Philippine Overseas Employment Administration
Viet Nam	2004	14.5	Center for Overseas Labour
Cambodia	2006	13.5	Manpower Training and Overseas Sending Board
Pakistan	2006	1.4	Overseas Employment Corporation
Uzbekistan	2006	5.6	Agency for Foreign Labor Migration Affairs
Bangladesh	2007	3.7	Bangladesh Overseas Employment and Service Limited
China	2007	1.4	Investment Promotion Agency, Ministry of Commerce
Kyrgyzstan	2007	0.4	Information Consulting Center
Myanmar	2007	7.1	Shwe Inn Wa Services Agency Co., Ltd
Nepal	2007	10.6	Department Of Labor Employment Promotion
East Timor	2008	0.6	Overseas Employment Office
Laos	2017	0	Employment Service Center

Source: OECD 2019 and Ministry of Labour and Employment, Ministry of Justice, HRD Korea¹⁵⁹

155. Seoul Metropolitan Government. (2014). Employment Procedures (General Foreigner) -. [online] Available at: <https://english.seoul.go.kr/service/living/working/employment/2-employment-procedures-ordinary-foreigner/>

156. OECD, 'Recruiting Immigrant Workers: Korea 2019', January 2019, https://www.oecd-ilibrary.org/social-issues-migration-health/recruiting-immigrant-workers-korea-2019_9789264307872-en.

157. OECD, 'Recruiting Immigrant Workers: Korea 2019', January 2019, https://www.oecd-ilibrary.org/social-issues-migration-health/recruiting-immigrant-workers-korea-2019_9789264307872-en.

158. OECD, 'Recruiting Immigrant Workers: Korea 2019', January 2019, https://www.oecd-ilibrary.org/social-issues-migration-health/recruiting-immigrant-workers-korea-2019_9789264307872-en

159. OECD, 'Recruiting Immigrant Workers: Korea 2019', January 2019, https://www.oecd-ilibrary.org/social-issues-migration-health/recruiting-immigrant-workers-korea-2019_9789264307872-en.

Key stakeholders

The key stakeholders involved in managing, organizing, recruiting and handling labour migration in South Korea include the Korea Immigration Service and the Human Resource Development Service, which approves the job seekers' applications. Other essential stakeholders are the Korean Chamber of Commerce, the National Labour Relations Committee, the Korea Employment Information Service, the Governmental Ministry of Employment and Labour, the Employment Services Policy Bureau, and the Labour Standards Policy Bureau. These organizations play crucial roles in integrating labour migrants into the labour force and coordinating social protections. The Korean Statistical Information Service provides reliable local and governmental data, while the Ministry of Justice oversees immigration processes and contributes to visa/migrant policy design. Additionally, the Joint Committee for Migrant Workers Korea and the Federation of Korean Trade Unions advocate for and support migrant workers' rights.

Conclusion

South Korea, like Japan, has undergone a significant transformation from a labour migration-exporting country to an immigration country since the 1980s. This shift is attributed to the country's rapid economic growth, industrialization, and distinctive demographic changes, leading to labour workforce shortages.

In response to these shortages, the government has established legal and institutional frameworks to manage migrant workers. The Employment Permit System (EPS) is South Korea's primary instrument for implementing its labour migration policy. Despite this policy change, South Korea, similar to Japan, has limited institutional experience in managing, recruiting and handling migrant workers compared to countries like Canada and Australia. Additionally, as a relatively homogeneous nation, South Korea has limited exposure to foreign migrants, particularly from Africa. The Korean language also poses a significant challenge for potential migrant workers, as proficiency is required for communication with employers.

Due to declining birth rates and an ageing population, South Korea faces significant workforce shortages. The come. Currently, South Korea is experiencing labour shortages in sectors such as caregiving, health, and personal service sectors are currently experiencing shortages, with an estimated 781,000 new jobs projected between 2020 and 2030. Other sectors requiring migrant workers include nursing, social work, home care, food service, agriculture, health care, retail and wholesale sales, ICT and construction.

South Korea has established labour migration partnerships with 16 Asian countries to offset labour shortages particularly in small and medium-sized enterprises. These countries supply migrant workers to address the shortages. These countries supply migrant workers to address the shortages. To address the increasing and persistent labour workforce shortages, South Korea is projected to require approximately 100,000 foreign workers annually, reaching a total of 1.5 million migrant workers between 2030 and 2050. This presents an unprecedented scenario for the country's labour market.

► 6. Summary of Key Findings for Part I of the Study

The section summarizes the key findings on countries of destination, providing insights into labour market conditions and essential information for governments in countries of origin seeking to establish skills-based labour migration partnerships. The findings are categorized into two main areas: general characteristics shared by all countries of destination and skills shortages

specific to each country. These findings shed light on critical issues for governments in selected countries of origin, facilitating informed decision-making for feasible skills-based labour migration partnerships with governments in countries of destination.

General Characteristics Among Countries of Destination

- ▶ Demographic shifts, marked by declining birth rates and ageing populations, contributing to workforce shortages.
- ▶ The growth of service economies in domestic markets, driven by structural changes in the global economy, particularly in sectors such as hospitality, home and healthcare, catering, accommodation and hotel services.
- ▶ Substantial labour shortages across numerous sectors. Increasing demand for migrant workers across all skill levels (low, medium, and high)
- ▶ Governments of countries of destination have established labour migration laws and legal frameworks to attract migrant workers. Bilateral Labour Migration Agreements, primarily in the form of Memoranda of Understanding (MoUs), have been established with countries of origin, mainly within specific regions. These MoUs outline partnership terms, recruitment processes, hiring procedures, and protections for migrant workers' rights.
- ▶ Diverse stakeholders participate in managing, selecting, recruiting, and handling migrant workers in all countries of destination. Notably, skills-based bilateral migration partnerships are scarce, except for limited skills development programs offered to labour migrants in Australia. Furthermore, none of the countries of destination have ratified the United Nations International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families.

Skills Shortages in Countries of Destination

- ▶ **Australia:** The country experiences shortages in health (registered nurses), education (primary and secondary school teachers), information technology, machinery operation, transportation, technical fields, trade workers, agriculture, construction, electrical work, carpentry, culinary arts, motor mechanics, and highly specialized professions.
- ▶ **Canada:** Skills shortages exist in management, healthcare, natural and applied sciences, social science, education, government services, sales and services, trade, transportation, equipment operation, hospitality (accommodation services), agriculture, food processing, manufacturing, utility occupations, administrative support, waste management, remediation, and warehousing services.
- ▶ **Japan:** Shortages are reported in nursing care, building cleaning, material processing, industrial machinery manufacturing, electric and electronic information-related industries, construction, shipbuilding, automobile maintenance, aviation, lodging, agriculture, fisheries, food and beverages manufacturing, and food services.
- ▶ **South Korea:** The country faces shortages in small and medium-sized industries, caregiving, healthcare, personal services, nursing, social work, home care, food services, agriculture, retail and wholesale sales, information communication technology, construction, transportation, cleaning and security guards, chemical-related machine operation, science professions, and highly skilled fields such as arts, sports, and culture.



PART

2

COUNTRIES OF ORIGIN: CASE STUDIES

► 7. Introduction

This section examines the labour migration dynamics in Ethiopia, Kenya and Uganda, focusing on their efforts to diversify bilateral labour migration partnerships with OECD countries, particularly Australia, Canada, Japan, and South Korea.

The Governments of Ethiopia, Kenya, and Uganda aim to establish viable skills-based labour migration partnerships with Australia, Canada, Japan, and South Korea. To achieve this, this part of the study examines the nature of labour migration patterns as well as the legal and policy frameworks governing migration in general and labour migration in each of the countries of origin.

Additionally, it maps out sectors, occupations, and skill levels in each country relevant to labour market needs in destination countries and beyond. The existing skills development patterns in the countries of origin are also reviewed, highlighting investments aimed at equipping the labour force and potential migrant workers with adequate and relevant high-demand skills required in domestic and foreign labour markets. This section sets the context for the country case studies, assessing the overall preparedness of the countries of origin for labour market needs in destination countries by identifying existing gaps and institutional policies and practices to address these gaps in the short and medium terms.

Establishing skills-based labour migration partnerships requires thorough preparation, time, and concerted efforts. Each country's case is reviewed within this context, acknowledging that no instant solutions exist; rather, sufficient preparation, time, and concentrated efforts are necessary to achieve desired outcomes.

Before examining the cases of each of the countries of origin, it is crucial to establish the context. Developing skills-based labour migration partnerships with the countries of destination discussed earlier is vital for harnessing migration's potential for the development of both origin and destination countries. The four selected countries of destination face significant skilled labour shortages across various sectors, including hospitality services, agriculture, construction, transportation, and machinery operations. These countries require migrant workers across all skill levels (low-, medium-, and high-skilled) to address current and future labour market needs.

To respond effectively, governments in countries of origin must strategically prioritize sectors and occupations. While numerous sectors and occupations in countries of origin align with labour market arrangements in destination countries, a selective approach may be necessary, focusing on a few promising sectors initially.

Establishing skills-based labour migration partnerships demands skills harmonization, verification systems, and joint assessments of labour market needs and available skills. This includes up-skilling workers in countries of origin to meet competency standards in destination countries.

Before assessing skills development patterns in countries of origin, it is essential to recognize that establishing skills-based labour migration partnerships necessitates meeting specific levels of skills harmonization. This involves implementing a skills verification system between countries of origin and destination, enabling joint assessments of labour markets and needs and available skills. Such partnerships also require addressing skills deficiencies in countries of origin through up-skilling, ensuring workers meet competency standards in destination countries' labour markets. Governments in Ethiopia and Kenya acknowledge that establishing these partnerships is a novel endeavour.¹⁶⁰ Deploying medium and high-skilled workers to OECD countries demands compliance with certification standards, equivalences, skills assessment procedures, and accreditation processes. Each destination country has distinct criteria for skills and occupational competencies.

160. Mrs. Jane W. Kamau, Director Industrial Training & Skills Development National Industrial Training Authority of Kenya and Mr. Azmera Kabede, Senior TVET advisor to state minister Ministry of Labour and Skills of Ethiopia

For instance, Australia employs a skills-based approach, aligning skill level criteria with qualifications acquired in countries of origin. Conversely, Japan adopts an occupational-based approach, identifying two types of specified skills requiring migrant workers. Canada and South Korea have similar requirements. To respond effectively, it is crucial to identify and select qualified migrant workers who meet each destination country's skills and occupational criteria. Assessing the readiness of each country of origin to meet labour market needs in destination countries is equally vital.

► 8. The Case of Ethiopia

Migration and human mobility have a long history in Ethiopia, rendering it a simultaneous source, transit point, and destination country for migrants.¹⁶¹ Since the 1970s, the country has experienced significant outflows of its population to various parts of the world driven by quests for secure livelihoods and economic opportunities. Ethiopia's labour migration to the Gulf States has been substantial, with approximately 460,000 migrants currently residing in Saudi Arabia, Kuwait and the United Arab Emirates.¹⁶²

Moreover, large Ethiopian Diaspora communities have formed in OECD countries, primarily in the United States and the United Kingdom. Estimates suggest that over 2.5 million Ethiopians live outside the country, predominantly in North America, Europe and the Middle East.¹⁶³ Between 2016 and 2021, official statistics indicate 839,000 Ethiopians migrated to other countries in search of job and economic opportunities, according to a joint survey report by the International Organization for Migration (IOM) and Ethiopia's Central Statistical Agency (CSA).¹⁶⁴ This brief overview illustrates the current profile of Ethiopian migrants. The breakdown of Ethiopian migrants to the selected countries of destination for this study is presented in the table below.

161. Migration, in this context, is simply defined as the movement of people, within as well as out of their countries of origin, pushed by socio-economic, political, religious or cultural issues at areas of departure and pulled by more favourable factors at destination areas (Datta, 2004:1)

162. International Labor Organization. (2019). Policy Brief: Key findings and recommendations from survey on labour migration from Ethiopia to Gulf Cooperation Council states and Lebanon. https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-addis_ababa/documents/publication/wcms_712236.pdf

163. Connecting Diaspora. (2020). Ethiopia - Connecting Diaspora. [online] Available at: <https://connectingdiaspora.org/countries-ed4d/ethiopia/> [Accessed 15 Mar. 2024].

164. Iom.int. (2021). More than 800,000 Ethiopians Migrated Abroad Over The Past Five Years. [online] Available at: <https://eastandhornofafrica.iom.int/news/more-800000-ethiopians-migrated-abroad-over-past-five-years> [Accessed 15 Mar. 2024].

►Table 16.

Official Count of Ethiopians Residing in Destination Countries, Including Temporary Workers, Permanent Residents, and Naturalized Citizens as Listed in Official National Statistical Counts

Australia ¹⁶⁵	Canada	Japan ¹⁶⁶	Korea
16,100	45,755 ¹⁶⁷	564 ¹⁶⁸	N/A ¹⁶⁹

Note: The number could be much bigger than that captured by official statistics.

Labour migrants, including diaspora, make a significant contribution to Ethiopia's economic development. As one of the top financial remittance destinations in Sub-Saharan Africa, Ethiopia benefits substantially from migrant transfers. According to the National Bank of Ethiopia, these transfers account for approximately 5% of the country's gross domestic product (GDP), providing a vital source of foreign currency and livelihood for many families.¹⁷⁰ Notably, official remittances reached US\$3.6 billion in fiscal year 2021, up from US\$104 million in 2000, as reported by the Ethiopian Diaspora Agency, despite the COVID-19 pandemic.¹⁷¹ In fact, labour migrants contribute more to Ethiopia's development than official development aid.¹⁷² Promoting skills-based labour migration can strengthen migration's development impacts and potentially lead to 'brain gain'. This occurs when training for potential migrant workers enhances local labour market skills, addressing skill mismatching and shortages. Additionally, migrants transfer non-financial social remittances, including technical knowledge, networks, resources, skills, and innovative business and trade practices. These benefits justify efforts to promote skilled labour migration, particularly now.

165. Data from Australian Bureau of Statistics 2022. Australian Bureau of Statistics 2022, Australia's Population by Country of Birth, ABS, viewed 24 February 2024, <<https://www.abs.gov.au/statistics/people/population/australias-population-country-birth/2022>>

166. Japanese Immigration Services Agency 2023, Foreign Residents by Nationality/Region and by Residence Status (Purpose of Residence), <https://www.e-stat.go.jp/stat-search/file-download?statInfId=000040124400&fileKind=0>

167. Canadian Census 2021 of Places of Birth for Immigrant Population and Data from December, 2023 Permanent Residents in Canada https://www.ircc.canada.ca/opendata-donneesouvertes/data/EN_ODP-PR-Citz.xlsx and data from December, 2023: "Temporary Residents: Temporary Foreign Worker Program (TFWP) and International Mobility Program (IMP) Work Permit Holders – Monthly IRCC Updates - Canada – International Mobility Program Work Permit Holders by Country of Citizenship and Year in which Permit(s) became effective."

168. Interestingly, there were only 116 Ethiopian students registered in Japan as of June, 2023. Also, there were no Ethiopian nationals registered in Japan in the technical intern training or specified skilled worker program. Permanent residents and migrants undergoing the refugee recognition process contribute 70 Ethiopians each at the time of data collection.

169. There is no data from the Korean authorities to comprehensively account for Ethiopian, Kenyan, and Ugandan migrants in South Korea. This is since most migrants to South Korea are from China, Vietnam, Thailand, and Uzbekistan, with only an unclear and small number of migrants from African countries of origin. Not only does the annual Survey on Immigrants' Living Conditions and Labour Force not account for country-specific data of migrants' countries of origin, but also the data for migrants from Africa is combined with data for migrants from South America. (There are 21,000 migrants from Africa and South America in South Korea.)

170. Andargachew, Ephrem. 2021. Ethiopia: Diaspora Contributing Tremendously in the Financial Sector. Ethiopian Herald, July 6, 2021. [Available online.](#)

171. Girmachew Adugna (2021). Once Primarily an Origin for Refugees, Ethiopia Experiences Evolving Migration Patterns. [online] migrationpolicy.org. Available at: <https://www.migrationpolicy.org/article/ethiopia-origin-refugees-evolving-migration> [Accessed 15 Mar. 2024].

172. OECD/ILO (2018), How Immigrants Contribute to Developing Countries' Economies, ILO, Geneva/OECD Publishing, Paris, <https://doi.org/10.1787/9789264288737-en>.

Recognizing this, the Government of Ethiopia is diversifying its bilateral labour migration partnerships with more destination countries across various regions. Bilateral development cooperation between Ethiopia and countries of destination.

Ethiopia has established bilateral development cooperation relationships with destination countries, including Canada, Japan, South Korea, and Australia. Canada, for instance, has provided significant international development assistance to Ethiopia, totalling \$215.57 million in 2020-21, although this funding doesn't directly support the Ethiopian government's budget.¹⁷³ Japan has also been a valuable partner, offering support through the Japan International Cooperation Agency (JICA) focused on agricultural and rural development, industrial promotion, infrastructure development, and education. This collaboration aligns with Ethiopia's second Growth and Transformation Plan, which aims to achieve the United Nations' Sustainable Development Goals.¹⁷⁴ Similarly, South Korea's Korea International Cooperation Agency (KOICA) has assisted Ethiopia in its transition to a low- and middle-income country status. KOICA's efforts focus on enhancing manufacturing capabilities, improving health and drinking water sanitation, addressing climate change, and promoting a peaceful society.¹⁷⁵ Australia also plays a crucial role through its Australian Development Agency/Foreign Ministry, providing scholarships and training opportunities for African professionals and emerging leaders under the Australia Awards Africa programme. This initiative includes master scholarships, fellowships, and executive short courses delivered by Australian education institutions in partnership with local education providers. Additionally, Australia offers humanitarian assistance to address food insecurity in Africa, particularly in the Horn of Africa.¹⁷⁶

Legal and Policy Frameworks Governing Migration

Ethiopia's government has taken significant steps to address the complexities of migration, recognizing its impact on the country's development. To effectively govern migration, the government has established various legal documents, including proclamations, declarations, directives, and frameworks, focusing on migration management, diaspora and development, and labour migration.¹⁷⁷ Multiple government stakeholders are involved in this effort, such as the House of Federation, the House of Peoples' Representatives, the Prime Minister's Office, and the Office of the Attorney General.¹⁷⁸

Specifically, the Ministry of Foreign Affairs provides consular service, coordinates repatriation and evacuation, protects Ethiopian nationals abroad and hosts victims support and anti-trafficking task forces. The Ministry of Labour and Social Affairs promotes local jobs, prevents irregular migration and supports labour contract development. The Ministry of Education enhances skills development for potential labour migrants through the Federal Technical and Vocational Education and Training agencies. The Office of Justice and Security ensures legal protection and addresses migration-related security concerns. Private employment agencies recruit and place workers, while local brokers and informal recruiters act as intermediaries. Overseas private

173. Global Affairs Canada (2023). Canada and Ethiopia. [online] GAC. Available at: <https://www.international.gc.ca/country-pays/ethiopia-ethiopie/index.aspx?lang=eng>

174. Jica.go.jp. (2015). Activities in Ethiopia | Where We Work - JICA. [online] Available at: <https://www.jica.go.jp/english/overseas/ethiopia/activities/index.html> [Accessed 15 Mar. 2024].

175. Korea International Cooperation Agency. (2017). Africa. [online] Available at: https://www.koica.go.kr/koica_en/3463/subview.do [Accessed 15 Mar. 2024].

176. Australian Government Department of Foreign Affairs and Trade. (2021). Australia's development program to Sub-Saharan Africa. [online] Available at: <https://www.dfat.gov.au/geo/africa-middle-east/development-assistance-in-sub-saharan-africa> [Accessed 15 Mar. 2024].

177. MIGNEX. (2024). Migration-relevant policies in Ethiopia. [online] Available at: <https://www.mignex.org/eth> [Accessed 15 Mar. 2024].

178. ILO. (2019). Mapping of Stakeholders Working on Migration and Coordination Mechanisms at Federal Level in Ethiopia. https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-addis_ababa/documents/publication/wcms_712784.pdf. See the study for an in-depth overview of Ethiopian stakeholders and their respective duties with respect to migration governance.

employment agencies recruit Ethiopian workers for foreign employment, and local private employment agencies operate within the country.

Trade unions and cooperatives advocate for workers' rights, and non-governmental organizations focus on preventing irregular migration through awareness-raising about migration and targeting unemployed youth, returnees and their families.¹⁷⁹

Ethiopia's emergence as a central hub for regional and global migrants has made migration management a top priority. Combating irregular migration, human trafficking, and migrant smuggling is crucial, alongside supporting returning migrants' economic and social reintegration. To address these challenges, the Ethiopian government drafted a comprehensive National Migration Policy in May 2022, currently under review.¹⁸⁰ Additionally, since 2013, the government has been developing a Diaspora Policy Engagement strategy, recognizing the Diaspora community's potential for national development through remittances, trade, foreign direct investment, philanthropy, and entrepreneurship.¹⁸¹ This commitment led to the establishment of the Ethiopian Diaspora Agency in 2019, with branch offices nationwide.¹⁸²

The Ethiopian government has been prioritizing the protection of low-skilled migrant workers in Gulf countries through the Ethiopian Overseas Employment Proclamation (No. 923/2016),¹⁸³ which safeguards their rights, safety and dignity while ensuring bilateral labour agreements are in place. To date, Ethiopia has signed bilateral labour migration agreements with Saudi Arabia, the United Arab Emirates, Jordan, and Qatar, with plans to expand to Kuwait, Oman, and Lebanon.¹⁸⁴

Beyond protecting low-skilled workers, the government is promoting labour migration for medium and high-skilled workers to new destinations. The Job Creation Commission (JCC) leads this initiative, exploring opportunities through new migration corridors and piloting programmes in in-demand sectors like nursing, IT, and construction.¹⁸⁵

Sectors and Occupations Relevant for Skills-Based Labour Migration Partnerships from Ethiopia

Ethiopia's skills-based labour migration partnerships can capitalize on high-demand sectors in destination countries, notably agriculture, home and healthcare, hospitality, construction, transportation, manufacturing, food services, retail trade, and domestic and care work. These sectors require practical experience and specific skills, primarily low and semi-skilled.¹⁸⁶ Most of these sectors require significant manpower with practical experience and certain skills, particularly low and semi-skilled. Ethiopia has a proven track record of sending low-skilled migrant workers to the Gulf States in these sectors.¹⁸⁷ To diversify bilateral partnerships, the government

179. ILO. (2019). Mapping of Stakeholders Working on Migration and Coordination Mechanisms at Federal Level in Ethiopia. https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-addis_ababa/documents/publication/wcms_712784.pdf. (49)

180. Federal Democratic Republic of Ethiopia. National Migration Policy. Addis Ababa, May 2022.

181. MoFA (Ministry of Foreign Affairs) (2013) Federal Democratic Republic of Ethiopia Diaspora Policy. Addis Ababa: MoFA.

182. Embassy of Ethiopia, London. (2019). Diaspora Agency Launched | Embassy of Ethiopia, London. [online] Available at: <https://www.ethioembassy.org.uk/diaspora-agency-launched/> [Accessed 15 Mar. 2024].

183. Federal Democratic Republic of Ethiopia. (2016). Ethiopia's Overseas Employment Proclamation. Proclamation Number 923/2016. https://www.lawethiopia.com/images/federal_proclamation/proclamations_by_number/923.pdf

184. ENA English. (n.d.). Ethiopian Workers to Resume Travel to Middle East in October. [online] Available at: https://www.ena.et/web/eng/w/en_3030 [Accessed 15 Mar. 2024].

185. Devex.com. (2018). Job Creation Commission (Ethiopia) | Devex. [online] Available at: <https://www.devex.com/organizations/job-creation-commission-ethiopia-137478>.

186. International Organization for Migration. 2021. Ethiopia Labour Force and Migration Survey: Key Findings. https://www.statsethiopia.gov.et/wp-content/uploads/2021/08/Final-2021-LABOUR-FORCE-AND-MIGRATION-SURVEY_Key-finding-Report-17AUG2021.pdf

187. African Trade Union Overview. 2018. Africa Labour Migration to the GCC States: The Case of Ghana, Kenya, Nigeria, and Uganda. https://www.ituc-africa.org/IMG/pdf/ituc-africa_study-africa_labour_migration_to_the_gcc_states.pdf

can prioritize sectors meeting destination countries' skill and occupational requirements. Ethiopia's past bilateral agreements focused on labour migration arrangements rather than skills-based labour mobility partnerships. By building on existing policy and practical experience, the government can establish skills-based partnerships with selected destination countries.

The targeted sectors require skilled workers, including nurses, healthcare professionals, IT specialists, engineers, and construction professionals. Ethiopia's Job Creation Commission can play a crucial role in promoting these sectors and facilitating skills development programmes.

Ethiopia possesses a comparative advantage in specific markets, particularly in agriculture, a sector employing 74% of the country's labour force and dominating its export economy.¹⁸⁸ Despite being labour-intensive, agriculture faces workforce surpluses due to vulnerability to climate shocks.

This surplus can be leveraged to meet labour demands in countries like Canada and Australia, where agricultural workers are currently needed. The Ethiopian government can explore skills-based bilateral labour migration cooperation agreements with these nations, modelled after existing seasonal migrant worker programmes. Inspired by the successful Mexican farm workers' partnerships, such agreements would enable Ethiopian farm workers to work in Canada and Australia as seasonal workers, returning home after the harvest period. This arrangement, exemplified by Canada's Seasonal Agricultural Worker Program, benefits both sides, illustrating a best practice case in agricultural labour migration,

By seizing this opportunity, Ethiopia can capitalize on its agricultural workforce, promote economic growth, and enhance labour migration management, aligning with international labour standards and best practices.

Beyond agriculture, the services sector presents another prime area for the Ethiopian government to prioritize in establishing skills-based labour migration partnerships with destination countries. Research reveals that the services sector in these countries faces significant labour workforce shortages. The services sector encompasses a vast array of hospitality industries, including housekeeping, transportation, wholesale trade and retail trade, hotels & resorts, travel, tourism, catering, restaurants and bars, food and beverage service, and theme parks.

This sector demands a substantial influx of migrant workers, driven by the growing service economy in domestic markets, stemming from structural changes in the global economy.

Another important sector that the interviewee¹⁸⁹ from the Ministry of Labour and Skills highlighted is the maritime industry, specifically the Maritime Institute at Bahir Dar University.¹⁹⁰ This institute provides professional maritime training, producing highly skilled marine engineers who meet international standards. With an annual output of over 500 officers in Marine Engineering and Electro-Technical skills and plans to increase to 1,000, the institute offers a significant talent pool. Although precise data is unavailable, some graduates have already been deployed overseas to shipping lines in various countries. The maritime sector presents an attractive entry point for Ethiopia to establish skills-based labour migration partnerships, particularly with Japan. Japan's shipbuilding and ship-related industry faces specialized labour shortages, aligning with Ethiopia's comparative advantage. By initiating skills-based labour migration partnership dialogues with Japan, Ethiopia can capitalize on this niche, deploying skilled marine engineers to Japan's ship-related industry. However, this requires ensuring Ethiopian professionals meet Japan's labour market requirements, including skills levels and qualifications.

188. Wieser, Christina; Tesfaye, Wondimagegn Mesfin. *Employment in Urban and Rural Ethiopia* (English). Washington, D.C.: World Bank Group. <http://documents.worldbank.org/curated/en/717091632198808079/Employment-in-Urban-and-Rural-Ethiopia>

189. Dr. Tilahun Bejital Zellelew, Focal Person, Ethiopia's Chairpersonship East and Horn of Africa Regional Ministerial Forum on Migration (RMFM) FDRE Ministry of Labour and Skills

190. Ethiopian Maritime Training Institute (2021). EMTI - Ethiopian Maritime Training Institute. [online] Available at: <https://emticorp.com/>

Selecting a few promising sectors is crucial in the initial phase of the skills-based labour partnership agreements with destination countries. Given the complexity of supplying migrant workers to multiple sectors simultaneously, a targeted approach is realistic and pragmatic.

Although skills-based labour mobility partnerships prioritize middle and high-skilled migrants, destination countries also require low and semi-skilled migrant workers, particularly in the services sector. This includes domestic and home care, supermarkets, shops, and garment services, among others. Capitalising on these opportunities can benefit Ethiopia's low and semi-skilled workers.¹⁹¹

Targeting these workers for employment abroad reduces domestic unemployment pressures, minimizes brain drain, and contributes to poverty reduction and improved livelihoods for their families and communities. This approach also addresses the situation of many migrant workers from East African countries, who are often deemed low and semi-skilled.¹⁹² Ethiopia can identify sectors in destination countries where it holds a comparative advantage, following bilateral agreements on skills-based labour migration partnerships.

According to the interviewee from the Ministry of Labour and Skills, the government of Ethiopia has recently started testing the waters in new destination countries for skills-based labour migration arrangements, such as Germany and Poland among others.¹⁹³ The government has initiated a few pilot initiatives in certain sectors in demand in labour markets in these countries, including construction, truck drivers or buses, and IT. By targeting medium and high-skilled workers in these sectors, Ethiopia can build on this endeavour and expand its skills-based labour migration partnerships to other destination countries, prioritizing sectors with comparative advantages.

Skills Development Patterns: The Case of Ethiopia

Ethiopia's skills development landscape has undergone significant transformations since the mid-1990s, driven by government policies aimed at enhancing technical education. A pivotal initiative has been the upgrading of TVET, now a cornerstone of efforts to boost youth employability and labour productivity.¹⁹⁴ The TVET system addresses skills gaps in the economy by training youth and young adults through formal and non-formal programmes. Formal TVET caters to students completing grade 10, offering one to five years of training, while non-formal TVET provides short-term training to diverse groups, including school leavers, entrepreneurs, and marginalized communities. Between 2000 and 2020, public TVET institutions grew from 16 to 334, with enrolment soaring from 3,400 to approximately 350,000.¹⁹⁵ Private TVET provision has also expanded, accounting for 51 percent of all TVET institutions. However, the lack of centralized data hinders accurate tracking of enrolment, graduation numbers, and skills levels. Organizing data sectorally would greatly benefit domestic and international labour market needs.

According to the MoLS, TVET success is measured by employment within a year of graduation. Ethiopia's National TVET Strategy, adopted in 2008,¹⁹⁶ and shifted focus from curriculum-based

191. This is while keeping in mind that each of the countries of destination has bilateral labour agreements with a host of countries located in its region that are already supplying migrant workers of all types of skills to different sectors in their respective labour markets.

192. African Union (2024). The Migration Policy Framework for Africa (MPFA) | African Union. [online] Available at: <https://au.int/en/documents/20181206/migration-policy-framework-africa-mpfa>

193. Mr. Azmera Kabede, Senior TVET advisor to state minister Ministry of Labour and Skills of the government of Ethiopia

194. International Labor Organization. 2022. National TVET policies and systems in Ethiopia. Opportunities and Challenges in Challenging Times. https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-addis_ababa/documents/publication/wcms_863440.pdf

195. International Labor Organization. 2022. National TVET policies and systems in Ethiopia. Opportunities and Challenges in Challenging Times. https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-addis_ababa/documents/publication/wcms_863440.pdf

196. Ministry of Education. 2008. "National Technical and Vocational Education and Training (TVET) Strategy." MoE, Addis Ababa, Ethiopia.

to occupational-standards-based approaches.¹⁹⁷ TVET providers must develop curricula that are aligned with national occupational standards and local labour market requirements. Despite this, the TVET system remains theoretical, neglecting practical skills training.¹⁹⁸ To improve, TVET institutions must prioritize employer involvement in programme selection, curriculum development, occupational standards, instructor training, and cooperative training models.¹⁹⁹

Since 2018, several TVET institutions in Ethiopia have benefited from the World Bank's East Africa Skills for Transformation and Regional Integration Project (EASTRIP: P163399).²⁰⁰ This programme aims to increase technical vocational education and training (TVET) in selected Regional Flagship TVET institutes, supporting regional integration in East Africa.

Launched in response to the 2015 World Bank Enterprise Surveys, EASTRIP addresses specialized TVET skills shortages in transport, energy, manufacturing (including agro-processing), and ICT. Seven Ethiopian TVET institutions were competitively selected as regional flagship training institutions in agro-processing, transport, energy, and textile sectors.

In November 2020, Ethiopia launched its Technical and Vocational Education and Training Policy and Strategy.²⁰¹ This policy aims to increase equitable access, improve quality, and enhance the relevance of TVET programmes. To achieve this, the policy focuses on strengthening outcome-based training through integrated, decentralised, and results-oriented systems that respond to skills demand. It also emphasizes intensifying employer engagement in occupation standards, cooperative training, and industry attachments for faculty, recognizing and supporting private training providers to expand training opportunities, and integrating entrepreneurship training into formal education and specialized programmes for graduate self-employment. Despite policy commitments, Ethiopia's TVET system remains underfunded, allocating only 5 per cent of the education budget to TVET, whereas general and higher education receive the bulk of funding (GIZ, 2018).²⁰²

To streamline the education system's qualifications, the Ministry of Education established the Ethiopian National Qualifications Framework (ENQF) in 2007.²⁰³ The ENQF addresses challenges relating to access, quality, relevance, and equity, as well as the lack of links between education sub-sectors, building on the Ethiopian Technical and Vocational Education and Training Qualifications Framework (TVETQF). The eight-level ENQF encompasses general education, TVET and higher education with descriptors outlining knowledge, skills and competence for each level. All qualifications are described in terms of purpose and characteristics.²⁰⁴ To ensure effective implementation, the ENQF is supported by seven directives, including qualification standard setting, quality assurance, qualification registration, assessment, credit accumulation and transfer, pathways, and awarding of qualifications.

197. International Labor Organization. 2022. National TVET policies and systems in Ethiopia. Opportunities and Challenges in Challenging Times. https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-addis_ababa/documents/publication/wcms_863440.pdf

198. Marielle Le Mat. 2020. Nexus skills/jobs: Assessment of Youth Skills Development/Jobs Nexus in Ethiopia. <https://www.rvo.nl/sites/default/files/2020/03/assessment-of-youth-skills-development-jobs-nexus-in-Ethiopia.pdf>

199. Cooperative training model refers to learning taking place in an integrated manner at two locations: in an enterprise (practical training on the job) and in a technical training institution (basic and theory training). Also called dual training model.

200. World Bank Group (2018). East Africa Skills for Transformation and Regional Integration Project (EASTRIP). [online] World Bank. Available at: <https://www.worldbank.org/en/news/loans-credits/2018/10/30/east-africa-skills-for-transformation-and-regional-integration-project-eastrip>.

201. Inter-Agency Group on Technical and Vocational Education and Training (IAG-TVET). 2020. https://unevoc.unesco.org/pub/november_2020_iag-tvet_newsletter.pdf

202. GIZ. 2018. Employment and Labour Market Analysis (ELMA) Ethiopia, Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH, Memo.

203. NESCO, ETF, Cedefop, 2023, *Global inventory of regional and national qualifications frameworks, volume II: national and regional case studies*

204. European Centre for the Development of Vocational Training, European Training Foundation, United Nations Educational, Scientific and Cultural Organisation, and UNESCO Institute for Lifelong Learning, 2019, *Global inventory of regional and national qualifications frameworks*

► **Table 17.**
Ethiopian National Qualifications Framework (ENQF) Levels

ENQF levels	Sub-framework for general education	Sub-framework for TVET	Sub-framework for higher education
8			Doctoral Degree
7			Postgraduate Diploma Master's
6			Bachelor Professional Graduate Diploma
5		TVET Certificate 5	
4	Diploma in Teaching	TVET Certificate 4	
3		TVET Certificate 3	
2		TVET Certificate 2	
1		TVET Certificate 1	

Source: UNESCO TVET Ethiopia country profile in 2020²⁰⁵

Since 2010, the National TVET Qualifications Framework (NTQF), has played a crucial role in rationalizing TVET provisions into a single, nationally recognized qualification.²⁰⁶ As a sub-framework of the Ethiopian National Qualifications Framework, NTQF defines various occupational qualification levels to be awarded. This framework aims to enhance the quality and relevance of TVET programmes.

In 2021, Ethiopia's skilling system underwent a significant transformation, falling under the purview of the MoLS.²⁰⁷ MoLS' mandate encompasses (overseeing labour issues, addressing job creation, and supervising the skilling system. The consolidation of overlapping mandates from the Jobs Creation Commission, Federal Urban Job Creation and Food Security Agency, and the Ministry of Labour and Social Affairs has streamlined labour and employment initiatives.

The TVET sector, a driving force behind skills development, now falls under MoLS' umbrella. Moreover, MoLS oversees entrepreneurial training through the Entrepreneurial Development Institute (EDI), created by merging the Entrepreneurship Development Centre and the Project Coordination Office of the Women Entrepreneurship Development Project.

The structural alignment presents an opportunity to strengthen linkages between labour market demand and skills supply, fostering a more cohesive skills development ecosystem in Ethiopia.

Ethiopia's TVET institutions offer technical education across various sectors and occupations. For this study, three sectors were selected for in-depth analysis to assess their readiness for skills-based labour migration partnerships: agriculture, hospitality (encompassing catering, restaurants, accommodation and hotel services), and information and communication technology (ICT). These sectors are chosen due to their potential for labour markets opportunities abroad and to evaluate the existing skills base feasible labour migration arrangements between Ethiopia and destination countries. The assessment aims to determine the availability of a skilled workforce in these sectors for deployment to destination countries in the short and medium term. To achieve this, the study seeks to identify gaps and challenges in training and skills development programmes for potential migrant workers, and gather baseline data on enrolment and graduation numbers per sector per year. Additionally, the assessment examines the skills acquired by graduates and their alignment with labour market demands in destination countries.

205. Unesco.org. (2024). Dynamic TVET Country Profiles. [online] Available at: <https://unevoc.unesco.org/home/Dynamic+TVET+Country+Profiles/country=ETH>.

206. James Keevy. 2020. African Continental Qualifications Framework, Country Report Ethiopia. <https://www.nepad.org/file-download/download/public/126935>

207. Mols.gov.et. (2024). Mols.gov.et – The Ministry of Labor & Skills. [online] Available at: <https://mols.gov.et/>.

The study also investigates employment figures for graduates in the domestic labour market, as well as the numbers of unemployed graduates due to limited local labour market absorption capacity. By examining these aspects, the assessment provides valuable insights into the sectoral readiness of Ethiopia's TVET institutions for skills-based labour migration partnerships.

The publicly available data on TVET enrolment in Ethiopia is limited and outdated. According to the United Nations Educational, Scientific and Cultural Organization (UNESCO) website, the only available data is the total TVET enrolment for 2016/2017, which is not disaggregated by sector.²⁰⁸ As a result, sector-specific enrolment numbers are not accessible through publicly available databases. It appears that such data exists but is fragmented across various government agencies, departments, and ministries and has yet to be centralized. This lack of aggregated data per sector hinders the assessment of the availability of a sufficient pool of skilled workers in the selected sectors - agriculture, hospitality, and information and communication technology (ICT) - for deployment to labour markets in destination countries. Consequently, baseline data on enrolment and graduation numbers, skills levels (semi, medium, and high), and employment outcomes (including numbers employed and unemployed in the domestic labour market after graduation) cannot be obtained. This data gap impedes the evaluation of the alignment between current skills development patterns and the government's overseas employment agenda.

Moreover, the lack of data makes it challenging to assess the alignment between skills development policy, employment practices, and migration patterns. There is a pressing need to evaluate the training programmes and curricula in the selected sectors to ensure they meet local and international market demands. The literature consulted does not provide clear evidence on whether Ethiopia has TVET institutions specifically dedicated to training potential migrant workers in high-demand sectors. Additionally, it is unclear whether training programmes exist to up-skill or re-skill workers to meet domestic and foreign labour market qualifications and competency standards.

Ultimately, the absence of reliable data prevents this study from appraising the nature and extent of existing skills development gaps and the challenges faced by the government in addressing these gaps.

Conclusion

Establishing skills-based labour migration partnerships is a relatively new phenomenon in Ethiopia, driven by the country's desire to harness the benefits of skills development, mobility, and mutual benefits for both countries of origin and destination.²⁰⁹ Ethiopia has extensive experience sending low-skilled migrant workers abroad but limited expertise in targeted partnerships for medium and high-skilled workers to new destinations.

To address this, the study proposes the development of strategic partnerships between Ethiopia and select destination countries, focusing on priority sectors with high demand for skilled workers. These partnerships would facilitate skills-matching, certification recognition, and streamlined migration processes. The study recommends selecting two or three pilot initiatives, leveraging existing bilateral agreements, such as those with Germany and Poland, to model effective partnerships for medium and high-skilled occupations.

208. Unesco.org. (2024). Dynamic TVET Country Profiles. [online] Available at: <https://unevoc.unesco.org/home/Dynamic+TVET+Country+Profiles/country=ETH> [Accessed 15 Mar. 2024].

209. International Organisation for Migration (IOM), 'Skills Mobility Partnerships', available at: <https://eea.iom.int/sites/g/files/tmzbd1666/files/documents/Skills-Mobility-Partnerships-Infosheet.pdf>, last accessed 22 February 2022. See also OECD, 'What would make Skills partnerships work in Practice?', 2018 available at: <https://www.oecd.org/els/mig/migration-policy-debate-15.pdf>, last accessed 22 February 2022

Since the mid-1990s, the Government of Ethiopia has established a considerable number of technical vocational education and training (TVET) institutions to enhance skills development. However, matching TVET certification in Ethiopia with occupational skill needs in destination countries requires establishing harmonized certification standards, skill assessment procedures, and accreditation processes. In-depth bilateral joint assessments would identify labour market needs and available skills, informing targeted training programs and ensuring mutually beneficial migration outcomes.

► 9. The Case of Kenya

Kenya, similar to Ethiopia, experiences a constant flow of migration driven by economic, labour market, political, demographic, and social factors. Kenya's migration history can be divided into distinct periods, often categorized as waves.²¹⁰ The first occurred during the 1950s and 1960s, when a small number of Kenyans emigrated to secure skilled occupations unavailable in Kenya, largely facilitated by international scholarships in the United Kingdom and the United States. The expectation was that these individuals would return to Kenya upon completing their degrees to occupy available positions.

The second wave took place during the 1970s and 1980s, as President Kenyatta's promotion of skills training for economic, social, and structural development. India emerged as a popular destination for self-funded students seeking education abroad. The third wave, spanning the 1990s and 2000s, saw Kenyans of all skill levels migrating to countries in Southern and Western regions, as well as the Middle East, in search of better opportunities driven by political, economic, environmental, and social factors. Today, considered the fourth wave, a significant number of professionals, particularly in the medical sector, are leaving Kenya.²¹¹

Trained doctors emigrate to countries like the US, UK, Canada, and Australia. Additionally, students migrate to these countries for education but often claim permanent residence due to factors such as job offers and marriage, exacerbating Kenya's brain drain issue.²¹²

The breakdown of Kenyan migrants across the selected countries for this study is presented below:

210. Sreya Chadalavada. Migration and Development in Kenya. Migration and Development in Kenya. <https://www.talkdiplo-macy.com/post/migration-and-development-in-kenya>

211. Wikipedia, History of Kenya. https://en.wikipedia.org/wiki/History_of_Kenya

212. Family Search. Kenya Emigration and Immigration. https://www.familysearch.org/en/wiki/Kenya_Emigration_and_Immigration

►Table 18

Official Counts of Kenyans in Destination Countries: Temporary Workers, Permanent Residents and Naturalized Citizens (As Listed in Official National Statistical Counts)

Australia ²¹³	Canada ²¹⁴	Japan ²¹⁵	Korea ²¹⁶
26,520	2,070	852 ²¹⁷	N/A

Note: The actual numbers may exceed those reported in official statistics.

Kenya's Bilateral Development Cooperation with Destination Countries

Kenya engages in bilateral development cooperation with its destination countries. Notably, Japan provides Official Development Assistance (ODA) Loans focusing on economic infrastructure, industrial development, agriculture, health, environment, and regional stabilization.²¹⁸

Furthermore, Japan has a significant economic presence in Kenya, with Japanese companies comprising the second-largest presence among Sub-Saharan African countries.²¹⁹

South Korea, through the Korea International Cooperation Agency (KOICA), supports education, climate change response, sanitation, health, and hygiene initiatives aligned with Kenya's Vision 2030.²²⁰ In 2022, South Korea committed US\$ 1 billion to various projects, including agriculture, health, energy, education, and infrastructure. During bilateral meetings, President Ruto urged Kim Jin-pyo, Speaker of the South Korean Parliament, to pass legislation easing trade between the two countries and securing job opportunities for Kenyans.²²¹ Canada's development assistance, channelled through the Canadian International Development Agency (CIDA), totals \$99.4 million (2020-2021), emphasizing employment, women's empowerment, quality education, skills building, and vocational training.²²² Australia's cooperation, facilitated by the Australian Development

213. Australian Bureau of Statistics 2022. Australian Bureau of Statistics 2022, Australia's Population by Country of Birth, ABS, viewed 24 February 2024, <<https://www.abs.gov.au/statistics/people/population/australias-population-country-birth/2022>>

214. Data from December, 2023 Permanent Residents in Canada https://www.ircc.canada.ca/opendata-donneesouvertes/data/EN_ODP-PR-Citz.xlsx and data from December, 2023: "Temporary Residents: Temporary Foreign Worker Program (TFWP) and International Mobility Program (IMP) Work Permit Holders – Monthly IRCC Updates - Canada – International Mobility Program Work Permit Holders by Country of Citizenship and Year in which Permit(s) became effective."

215. Japanese Immigration Services Agency 2023, Foreign Residents by Nationality/Region and by Residence Status (Purpose of Residence), <https://www.e-stat.go.jp/stat-search/file-download?statInfId=000040124400&fileKind=0>

216. There is no data from the Korean authorities to comprehensively account for the amount of Kenyan migrants in South Korea. This is due to the fact that the majority of migrants to South Korea are from China, Vietnam, Thailand, and Uzbekistan, with only an unclear and small number of migrants from African countries of origin. Not only does the annual Survey on Immigrants' Living Conditions and Labour Force not account for country-specific data of migrants' countries of origin, but also the data for migrants from Africa is combined with data for migrants from South America.

217. There were 266 Kenyan students registered in Japan at the time of data collection (June, 2023). Permanent residents (204), Kenyan nationals with a family-stay related visa (124) and Kenyan nationals with humanities, technology, international affairs related occupation (123) also formed significant categories. Importantly, there were no Kenyan nationals registered in Japan in the technical intern training or specified skilled worker program as Kenya does not have a bilateral labor migration partnership with Japan.

218. Official development assistance (ODA) is defined as government aid that promotes and specifically targets the economic development and welfare of developing countries.

219. Embassy of Japan. 2020. Country Development Cooperation Policy for the Republic of Kenya. <https://www.ke.emb-japan.go.jp/files/100255047.pdf>

220. Korea International Cooperation Agency. (2017). Africa. [online] Available at: https://www.koica.go.kr/koica_en/3463/subview.do.

221. Ministry of Foreign and Diaspora Affairs. (2014). KENYA, SOUTH KOREA PLEDGE TO WORK TOGETHER – FOREIGN & DIASPORA AFFAIRS | KENYA. [online] Available at: <https://mfa.go.ke/kenya-south-korea-pledge-to-work-together/>.

222. Global Affairs Canada (2018). Canada-Kenya relations. [online] GAC. Available at: <https://www.international.gc.ca/country-pays/kenya/relations.aspx?lang=eng>.

Agency/Foreign Ministry, offers scholarships and training through the Australia Awards Africa, enabling Kenyan professionals and leaders to access master's scholarships, fellowships, and executive courses at Australian institutions.²²³

Legal and Policy Frameworks Governing Migration

Kenya serves as a hub for various migrants, including asylum seekers, refugees, and economic migrants from countries like Ethiopia, Somalia, and South Sudan.²²⁴

Recognizing migration's multiple dimensions, challenges, and potentials, the Kenyan government has established legal and policy frameworks to address these issues effectively

The government launched the Kenyan National Migration Coordination Mechanism in 2016 (IOM, 2016; RMMS, 2017a), a government-led inter-agency platform coordinating migration management in Kenya, bringing together government and non-state actors.²²⁵ Additionally, the Kenya Diaspora Policy, developed in 2015 (IOM, 2015), aims to mainstream the Kenyan diaspora into national development plans and programming (IOM, 2015). Through the National Coordination Mechanism on Migration (NCM), the government has been committed to finalizing the Kenya National Migration Policy, which remains in draft form and awaits parliamentary validation. The policy aims to provide a roadmap to address migration impacts and challenges, aligning with relevant international, regional and national frameworks, including the Kenya Vision 2030, the Big 4 Agenda, the Sustainable Development Goals, the Global Compact for Migration, Migration Governance Framework, the African Union Migration Framework, and the Intergovernmental Authority on Development (IGAD) Regional Migration Policy Framework.²²⁶

In 2023, the Kenyan government established a comprehensive National Policy on Labour Migration, incorporating other relevant policies and legal frameworks, such as the Employment Policy and Strategy for Kenya, the Diaspora Policy, and the labour laws of 2007.²²⁷ The policy prioritizes good governance in labour migration, the protection of migrant workers and their families, and the optimization of labour migration benefits in development. Furthermore, the Parliament of Kenya adopted the Labour Migration Management Bill in 2023,²²⁸ regulating private employment agencies and recruitment of Kenyans to work within and outside Kenya, safeguarding job seekers' and migrant workers' rights, and establishing the Kenya Migrant Workers Welfare Fund. Other key legislation governing migration in Kenya includes the Labour Institutions Act (2007),²²⁹ the Employment Act (2007), the Counter Trafficking in Persons Act (2010), and the General Regulations (2014). Kenya has also ratified ILO Conventions No. 97 and No. 143, incorporating them into national legislation to enhance migration management and protect migrant worker rights.

223. Australian Government Department of Foreign Affairs and Trade. (2021). Australia's development program to Sub-Saharan Africa. [online] Available at: <https://www.dfat.gov.au/geo/africa-middle-east/development-assistance-in-sub-saharan-africa>.

224. IOM. 2019. Migration in Kenya: A Country Profile. <https://publications.iom.int/books/migration-kenya-country-profile-2018>

225. International Organization for Migration 2016 "Kenya Unveils National Migration Coordination Mechanism", 22 July. Available at <https://www.iom.int/news/kenya-unveils-national-migration-coordination-mechanism>.

226. Kenya Gazette Supplement No. 123 (Senate Bills No. 33). (2023).

227. Ministry of Labour and Social Affairs. Kenya National Policy on Labour Migration. August 2023.

228. The Labour Migration Management Bill. <http://www.parliament.go.ke/sites/default/files/2024-02/The%20Labour%20Migration%20Management%20Bill%2C%20No.%2033%20of%202023.pdf>

229. International Labor Organization. 2007. The Labour Institutions Act, 2007. <https://www.ilo.org/dyn/travail/docs/508/labour>

Kenya's labour migration management involves a complex network of governmental institutions, non-state actors, and private sector organizations.²³⁰ The government has established various ministries to oversee different aspects of labour migration, including the Ministry of Interior, Ministry of Labour and Social Protection, Ministry of Foreign Affairs, Ministry of Health, State Department for Youth, Department of Immigration, and the National Registration Bureau. The Ministry of Foreign Affairs plays a crucial role in maintaining diplomatic ties with countries of destination, particularly regarding bilateral labour agreements. The Ministry of Labour and Social Protection collaborates with the Ministry of Interior to draft and implement key labour migration policies. To ensure Kenyan migrant worker safety and employment recruitment, the government has launched three labour attachés in Qatar, Saudi Arabia, and the United Arab Emirates.²³¹ The Kenya National Coordination Mechanism (NCM) is a government-led initiative that brings together various stakeholders to harmonize labour migration policies and implement the Global Compact for Safe and Orderly Migration.²³² The Kenya National Commission on Human Rights coordinates with recruitment agencies to safeguard the rights of migrant workers. The National Employment Authority (NEA) manages pre-departure training for labour migrants, publicizes lists of Kenyan recruitment agencies via the National Employment Authority Integrated Management System (NEAIMS), and operates an online platform for the recruitment of domestic workers to Saudi Arabia through NEAIMS.²³³ This integrated system enhances transparency, efficiency, and protection for migrant workers.

In addition to government efforts, non-state actors such as Trace Kenya, HAART, BLUE HEART, Stop Traffic Kenya, Association of Skilled Migrant Agencies of Kenya, and Kenya Association of Private Recruitment Agencies are involved in migration-related projects. Private sector actors, including the Federation of Kenya Employers, the Central Organization of Trade Unions, and the Kenya Private Sector Alliance, also play a significant role in labour migration management.²³⁴

To enhance working conditions for its nationals abroad, the Kenyan government has negotiated BLAs with key destination countries. Notably, BLAs were signed with Saudi Arabia and the United Arab Emirates in 2017 and 2018, respectively, and with Qatar in 2012. These agreements aim to improve the protection and welfare of Kenyan migrant workers. Furthermore, Kenya is actively engaging with new destination countries to establish bilateral skills-based labour migration partnerships. High-level policy dialogues are underway between the Kenyan government and the governments of Canada and Germany, focusing on tailored labour migration arrangements.²³⁵ However, according to the interviewee, the operationalization of these bilateral partnerships may take time. This delay is attributed to several factors, including the need to assess the technical skills available in Kenya and match them with labour market demands in destination countries.

230. A 2019 report by the Principal Secretary for the State Department of Labour stated: "The fragmented and uncoordinated administration of labour migration coupled with inadequate resources inhibits effective synergy and coordination of labour migration management and implementation of programmes." Republic of Kenya, (2019). Kenya Labour Migration: Trends, Challenges, Management and Potential Areas for Cooperation <https://www.labour.go.ke/sites/default/files/2022-10/PS-Presentation-for-Regional-LM-Forum-FINAL..pdf>

231. Republic of Kenya State Department for Labour (2019). Kenya Labour Migration: Trends, Challenges, Management and Potential Areas for Cooperation <https://www.labour.go.ke/sites/default/files/2022-10/PS-Presentation-for-Regional-LM-Forum-FINAL..pdf>

232. Republic of Kenya Ministry of Interior and Coordination of National Government. (2022). KENYA VOLUNTARY REVIEW REPORT ON IMPLEMENTATION OF THE GLOBAL COMPACT FOR SAFE, ORDERLY AND REGULAR MIGRATION (GCM) <https://migrationnetwork.un.org/system/files/docs/Kenya%20-%20Voluntary%20GCM%20Review.pdf>

233. Republic of Kenya Ministry of Interior and Coordination of National Government. (2022). KENYA VOLUNTARY REVIEW REPORT ON IMPLEMENTATION OF THE GLOBAL COMPACT FOR SAFE, ORDERLY AND REGULAR MIGRATION (GCM) <https://migrationnetwork.un.org/system/files/docs/Kenya%20-%20Voluntary%20GCM%20Review.pdf>

234. Republic of Kenya Ministry of Interior and Coordination of National Government. (2022). KENYA VOLUNTARY REVIEW REPORT ON IMPLEMENTATION OF THE GLOBAL COMPACT FOR SAFE, ORDERLY AND REGULAR MIGRATION (GCM) <https://migrationnetwork.un.org/system/files/docs/Kenya%20-%20Voluntary%20GCM%20Review.pdf>

235. This ongoing policy dialogue was communicated to us by Mr. Jacob Gatimu, in a virtual interview conducted on 29, November 2023. Mr. Gatimu is the labour officer at the Ministry of Labour in Kenya

Additionally, upscaling existing skills to meet international standards requires time, ensuring that potential labour migrant workers possess the necessary qualifications before deployment abroad.

Sectors and Occupations Relevant for Skills-Based Labour Migration Partnerships: The Case of Kenya

Kenya, like Ethiopia, has various sectors and occupations that align with labour market needs in destination countries. Several sectors, including hospitality, construction, domestic care, and transportation, already employ Kenyan migrant workers in the Gulf States.²³⁶ Building on this existing presence, the Kenyan government can strategically select sectors to focus on skills-based bilateral labour migration partnerships. Potential sectors for consideration include nursing and healthcare, information IT, machine operation and technical services. These sectors require migrant workers with certified qualifications, making skills-based labour migration partnerships beneficial for Kenya in the long run.

Destination countries, particularly Japan and South Korea, demand specialized technical skills in various operations. These include machine maintenance and repair, machinery operation, lodging, furniture making, plastic moulding, welding, automobile repair and maintenance, and electric and electronic information-related industries, as well as shipbuilding and ship-related industries and small and medium industries. To address these labour market needs, skills development in specialized technical skills is crucial.²³⁷

Training potential migrant workers in these skills enables them to perform specific tasks in specific sectors, both domestically and internationally. Fortunately, countries of origin, including Kenya, have been investing in technical skills development through the establishment of Technical and Vocational Education and Training (TVET) institutions, which have gained policy priority in recent years.

Kenya can strategically prioritize sectors such as hospitality (encompassing tourism and hotel management), nursing and IT for skills-based labour migration partnerships. An expert from the National Industrial Training Authority's Industrial Training & Skills Development notes that nursing and IT are promising sectors for destination countries' labour needs, given Kenya's sufficient pool of skilled professionals in these areas.²³⁸ Kenya's IT sector has emerged as a hub for software outsourcing due to its English-speaking, well-trained professionals. This presents opportunities for skills-based partnerships, enabling Kenyan professionals to provide services to destination countries while remaining in Kenya.

Similarly, Kenya boasts well-trained and specialized nursing professionals, with a significant surplus available for deployment to destination countries. For instance, the Government of Kenya has committed to recruiting 2,500 nurses to Saudi Arabia.²³⁹ Under the Global Compact on Migration, Kenya and Saudi Arabia are collaborating to enhance safe, regular, and mutually beneficial skills-based labour migration. These sectors can be considered "low-hanging fruits" for skills-based labour migration partnerships once agreements are reached.

236. Malit, Froilan and Youha, Ali Al. (2016). Kenyan Migration to the Gulf Countries: Balancing Economic Interests and Worker Protection. [online] [migrationpolicy.org](https://www.migrationpolicy.org/article/kenyan-migration-gulf-countries-balancing-economic-interests-and-worker-protection). Available at: <https://www.migrationpolicy.org/article/kenyan-migration-gulf-countries-balancing-economic-interests-and-worker-protection>.

237. SHIN, G.-W., CHOI, J. N., & MOON, R. J. (2019). Skilled Migrants as Human and Social Capital in Korea. *Asian Survey*, 59(4), 673–692. <https://www.jstor.org/stable/26848396> and Mofa.go.jp. (2019). Japan is looking for Specified Skilled Workers! | Ministry of Foreign Affairs of Japan. [online] Available at: <https://www.mofa.go.jp/mofaj/ca/fna/ssw/us/>.

238. Mrs. Jane W. Kamau, Director Industrial Training & Skills Development of the National Industrial Training Authority of Kenya

239. Ministry of Labour and Social Protection. Declaration of Vacancies: REQUEST FOR EXPRESSION OF INTEREST FROM QUALIFIED KENYAN NURSES AND MIDWIVES FOR EMPLOYMENT IN THE KINGDOM OF SAUDI ARABIA. https://kenyaembassystockholm.com/wp-content/uploads/2023/07/EOI-for-Nurses-to-Saudi-Arabia_27.06.2023.pdf

Kenya's Technical and Vocational Education and Training system supports this goal, with 1,156 public vocational training centres, 88 private vocational training centres, and 255 public technical and vocational colleges as of 2021.²⁴⁰ TVET institutions provide various education and skills training programmes, including tourism and information technology, leading to degrees, diplomas, and certificates.

In Kenya, TVET is recognized as a crucial driver of economic restructuring and transformation, as seen in countries like the Republic of Korea, Singapore, and China. Countries that have successfully utilized TVET as a tool for technology transfer and workforce skills enhancement.²⁴¹ This is one of the key reasons TVET is gaining momentum in the countries of origin as a policy priority to enhance skills investment, and labour productivity and economic transformation. This surge is largely driven by the growing domestic labour market's demand for practically skilled workers to run factories and industries, particularly in the private sector.

The next section explores Kenya's TVET landscape, examining skills development patterns, institution types, and readiness to deploy a skilled workforce to destination countries.

Skills Development Patterns in Kenya

Kenya's skills development landscape combines formal education with non-formal practical technical skills training. Notably, technical skills training is increasingly in demand in the domestic labour market. Investing in quality skills development is crucial for driving youth employment and sustainable economic growth. The Government of Kenya has demonstrated commitment to promoting skills development through the Technical and Vocational Education and Training reforms, enacted through the TVET Act No 29 of 2013 and updated in 2024.²⁴² The government's efforts are also aligned with the UNESCO Strategy for TVET (2022-2029), which aims to enhance labour market relevance and adapt to economic transitions. In 2024, Kenya introduced an updated TVET Bill, aiming to establish a comprehensive TVET system, governing institutions, coordinate assessments and certifications, promote access and equity, and ensure standards, quality, and relevance.²⁴³

Additionally, the constitutional reform of 2010 and Kenya Vision 2030, a long-term development plan, have given impetus to the transformation of TVET institutions in the country.²⁴⁴ TVET has become crucial in achieving national and international socio-economic development goals, particularly as populations grow. This is evident in the numerous legislative reforms, strategy papers, and new programmes adopted in recent years. Despite progress, however, TVET's potential is hindered by significant challenges. A lack of financial resources and capable personnel has limited the attainment of strategic goals and impeded reform implementation. Furthermore, duplication of responsibilities at operational and steering levels, coupled with a fragmented legal framework, poses additional obstacles. Addressing these challenges is essential to optimizing TVET's contribution to socio-economic development.

240. Unesco.org. (2024). Dynamic TVET Country Profiles. [online] Available at: <https://unevoc.unesco.org/home/Dynamic+TVET+Country+Profiles/country=KEN> [Accessed 21 Mar. 2024].

241. Asian Development Bank. 2014. Innovative strategies in technical and vocational education and training for accelerated human resource development in South Asia. <https://www.adb.org/sites/default/files/publication/41186/innovative-strategies-technical-vocational-education-training.pdf>

242. The Republic of Kenya. 2013. The Technical and Vocational Education and Training Act. http://kenyalaw.org/8181/exist/rest/db/kenyalaw/Kenya/Legislation/English/Acts%20and%20Regulations/T/Technical%20and%20Vocational%20Education%20and%20Training%20Act%20-%20No.%2029%20of%202013/subsidiary_legislation/docs/TechnicalandVocationalEducationandTrainingAct29of2013_subsidary.pdf

243. The Republic of Kenya. 2024. The Technical and Vocational Education and Training Bill. https://www.education.go.ke/sites/default/files/2024-02/Technical_and_Vocational_Education_and_Training_Bill%2C_2024-29th%20Feb%2012%2011pm.pdf

244. Vision 2030 conforms to the regional development strategy, Africa 2063, and to the United Nations Sustainable Development Goals. See www.vision2030.go.ke for more information

Effective TVET systems require sustained investment, efficient governance, and coordinated efforts to ensure quality, relevance, and accessibility. TVET is crucial in addressing skills mismatch, which hinders youth from securing decent jobs or becoming self-employed.²⁴⁵

A recent report highlights that TVET institutions in Kenya must undergo significant transformation to cater to the rapid technological advancements and growing industries demanding specialized technical skills. Developing market-relevant skills and competencies is vital for accelerating economic development and achieving Kenya Vision 2030. However, inadequate skill development in target sectors impedes labour productivity. The current TVET system struggles to match the required skills for the labour market, resulting in a significant problem that policymakers must address. Furthermore, TVET skills development is often theoretical, lacking practical and vocational education, similar to Ethiopia's system. According to a 2018 World Economic Forum Report, 30% of Kenya's workforce lacks adequate skills, negatively impacting labour productivity.²⁴⁶

Three out of ten Kenyans lack the required skills, reducing productivity and increasing business costs. This underscores the need for industry-led skills policies to connect human skills development with labour market needs. To address these challenges, the government of Kenya established the Kenya National Qualifications Framework Regulations in 2018 and the Kenya National Qualifications Authority under Section 6 of the Kenya National Qualifications Framework Act. No. 22 of 2014. The KNQF provides a learning outcome-based qualifications framework, covering formal, non-formal, and information education sectors. It establishes a common regulatory system for qualification development, assessment, and award, ensuring harmonization with East African Community qualification frameworks. A central register of qualifications outlines clear criteria for achieving awards, detailing required knowledge and skills.²⁴⁷

► **Table 19.**
Kenya National Qualifications Framework Skill Classification

Level	Academic qualifications	TVET qualifications
1	Kenya Certificate of Primary Education (KCPE)	Certificate I/Basic Skills/Skills for Life
2		Vocational Certificate I Pre-Vocational
3		Vocational Technical Certificate II
4		Vocational Technical Certificate III
5		Vocational Technical Certificate IV
6	Diploma	Diploma
7	Bachelor's Degree	
8	Postgraduate Diploma Certificate	
9	Master's Degree	
10	Doctorate	

Source: UNESCO TVET Kenya Country Profile in 2020²⁴⁸

245. Republic of Kenya. 2022. TVET Knowledge and Key Highlights Report Mapping Technical and Vocational Educational and Training Data in Kenya. [TVET-Knowledge-and-Key-Highlights-Report-Mapping-Technical-and-Vocational-Educational-and-Training-Data-in-Kenya-May-2022.pdf](https://www.ziziafrique.org/TVET-Knowledge-and-Key-Highlights-Report-Mapping-Technical-and-Vocational-Educational-and-Training-Data-in-Kenya-May-2022.pdf) (ziziafrique.org)

246. Financial Tribune. 2018. 30% of Kenyan Workforce Lacks Skills. <https://financialtribune.com/node/84811>.

247. Kenya Subsidiary Legislation. 2018. THE KENYA NATIONAL QUALIFICATIONS FRAMEWORK ACT, 2014. <https://www.knqa.go.ke/wp-content/uploads/2018/10/KNQF-Regulations-2018.pdf>

248. JET Education Services, 2020. [African Continental Qualifications Framework, Country Report Kenya](#) (accessed February 2024)

Kenya has established a network of TVET institutions over the years. The Ministry of Education, Science and Technology (MOEST) oversees these institutions through its State Department of Vocational and Technical Training and the State Department for Post Training and Skills Development, which are responsible for initial and continuing TVET. Seven key semi-autonomous government agencies (SAGAs) operate under MOEST's control, playing a crucial role in vocational training. These SAGA's include the Technical and Vocational Education and Training Authority (TVETA), National Industrial Training Authority (NITA), Kenya National Qualifications Authority (KNQA), Kenya Institute of Curriculum Development (KICD), Directorate of Vocational Education and Training (DVET), Kenya Vocational Training Authority (KVTA), and National Polytechnics Authority (NPA). These SAGAs work together to ensure effective management, regulation, and quality assurance of TVET programmes in Kenya. TVET institutions in Kenya include universities, national polytechnics, technical training institutes, vocational training centres, and technical trainer colleges, offering various programmes from certificate to degree levels in fields such as technology, business, healthcare, and agriculture.

In Kenya, the Ministry of Labour and Social Protection (MLSP), specifically its State Department of Labour, is responsible for labour market policy, human resource planning and development, and industrial relations. The Ministry oversees the industrial training system through the National Industrial Training Authority (NITA) which operates five Industrial Training Centres for apprenticeships, indentured learnerships, and industrial attachment programmes (NITA, n.d.-a; Republic of Kenya, 2012a [1959, 1983]; Republic of Kenya, 2012b [2007]). Vocational Rehabilitation Centres catering to learners with disabilities and the Kenya National Occupational Classification System (KNOCS) (MLSP, 2019, p. 11).

To assess Kenya's readiness for skills-based labour migration partnerships, three sectors were selected: nursing, information and communication technology (ICT), and hospitality (tourism and hotel management). These sectors show promising potential for labour markets abroad. The study aimed to collect baseline data on enrolment and graduation numbers, skills levels attained, and employment outcomes in the domestic market. The objective was to determine if Kenya has a sufficient pool of skilled workers in these sectors to match labour market demands in destination countries. Using the same methodology employed in the Ethiopian case study, the research focused on these key sectors as a starting point for establishing further skill-based labour mobility partnerships. Analyzing these sectors provides valuable insights into Kenya's readiness for skills-based labour migration partnerships with destination countries. The nursing sector is first examined, focusing on enrolment and graduation numbers, skills levels attained, and employment outcomes. The table presents essential baseline data on the nursing sector in Kenya.

► **Table 20.**
Nurses Statistics in Kenya – December 2023

No.	Description	Numbers
1.	Number of registered nursing schools in Kenya	Total- 153 (31 universities and 122 Mid-level Colleges)
2.	Numbers and cadres of nurses graduated as at t 29 December 2023	
	Cadre	Number (average per year)
	Degree	1,800
	Diploma	12,000
	Certificate	1,000
3.	Numbers of registered nurses in Kenya (Degree, diploma and certificate)	221,405
4.	Unemployed nurses and their cadres	Degree-2006 Diploma- 9447 Certificate- 1995
	Home-Based Health Assistants Level III	
5.	The National Industrial Training Authority (NITA) has a curriculum on Home-Based Health Assistants Level III whose plans for piloting are underway. This is targeted for April 2024	

Note: This table is adapted from the Industrial Training & Skills Development National Industrial Training Authority of Kenya in December 2023.

Kenya boasts numerous institutions offering ICT training and skills development through single courses or integrated programmes. The National Industrial Training Authority assesses ICT skills acquired formally, informally, and non-formally, but these numbers don't reflect the total ICT workforce in Kenya. For instance, in December 2023, NITA evaluated 467 ICT candidates, comprising 1.2% of the Government Trade Test participants. Additionally, around 400 trainees developed skills at NITA centres.

Note that ICT training is among Kenya's most popular courses, with ICT-related educational programmes and training offered at universities, government and private TVET institutions, and international institutions. This popularity has enabled many Kenyan youth to secure online jobs worldwide, as mentioned earlier.²⁴⁹

249. This data on the ICT skills development is provided by Mrs. Jane W. Kamau, Director Industrial Training & Skills Development of the National Industrial Training Authority of Kenya

Similarly, hospitality training is a common course in Kenya, offered at various levels up to university. Several institutions, both governmental and private, provide training certified by the NITA during annual assessments. In December 2023, NITA assessed 1,617 Food Production candidates, representing 4.2 per cent of the total assessed, and 434 food service candidates, accounting for 1.1 per cent of the total assessed. Kenya also boasts comprehensive training in hotels, such as Boma International Hospitality College, a five-star hotel offering Swiss-accredited programmes in Culinary Arts and Hotel Management in partnership with the Business and Hotel Management School in Lucerne, Switzerland. Established in 2015, the college has graduated over 700 trainees and expanded its capacity to 400 trainees, focusing on employment-related skills development and making hospitality one of the region's most sought-after courses.

Kibondeni College and Boma International Hospitality College are renowned for hospitality training, with over 6,000 graduates securing local and international jobs. Utalii College offers diverse courses, training 70,000+ students since 2011.²⁵⁰

Kenya's nursing sector provides comprehensive graduation and employment data, unlike other sectors. However, none track annual enrolment figures.

Kenya's NITA centralizes data, setting an example for Ethiopia and Uganda. Kenya's training institutions effectively prepare students for domestic and international labour markets. This positions Kenya favourably for skills-based labour migration partnerships. Notwithstanding these limitations, the data presented for Kenya's three sectors offer valuable insights. Kenya has largely succeeded in organizing and centralizing sector-specific data, unlike Ethiopia. This achievement can be attributed to NITA, which plays a pivotal role in assessing skill-levels and collecting annual sectoral data - a significant accomplishment. Ethiopia and Uganda may benefit from emulating this approach. Moreover, Kenya's training institutions have adopted effective methodologies to prepare the future workforce for domestic and international labour markets. The evidence from the three selected sectors indicates that Kenya possesses a labour workforce with adequate and relevant skills and experience. In contrast, Ethiopia lacks organized sectoral data, making it difficult to assess its workforce's readiness. Overall, Kenya is well-positioned for skills-based labour migration partnerships with destination countries in the near future.

Conclusion

Kenya has a strategic advantage in deploying medium- and high-skilled labour migrant workers to new destinations. Study findings reveal that labour markets in destination countries require workers with medium and high-skilled competency standards, particularly those with specialized technical skills for machinery maintenance and operation. Kenya holds a strategic advantage in deploying labour migrants to destination countries.

In response to labour market needs in destination countries, it is recommended that Kenya considers prioritizing select sectors for pilot initiative with partner countries. Analysis of Kenya's nursing, IT, and hospitality sectors reveals they meet required skills competency standards, making them suitable for skills-based labour migration partnerships.

Kenya's skilled workforce can address labour market needs in destination countries remotely, particularly in IT. Research indicates Kenyan IT specialists engage in online work for global clients.

The presence of numerous Japanese companies in Kenya presents an opportunity for enhanced skills-based partnerships between the two countries. A potential bilateral agreement could facilitate increased Japanese investment in Kenya, employing more skilled Kenyan workers locally. Kenya boasts a sufficient pool of workers with specialized technical skills, suitable for Japanese companies and others, to maintain and repair machines and perform machinery operations.

250. This data is provided by Mrs. Jane W. Kamau, Director Industrial Training & Skills Development of the National Industrial Training Authority of Kenya

In the nursing sector, Kenya committed to sending trained nurses to Saudi Arabia and can expand to new destinations such as South Korea, where bilateral labour migration discussions are underway. The Germany-Philippines partnership offers a valuable model. This partnership provides specialized nursing courses in the Philippines tailored to meet Germany's nursing requirements. Recognizing participating nurses' qualifications. The programme, funded by the Bertelsmann Stiftung and the Federal Ministry of Health, has placed approximately 5,000 qualified nurses from the Philippines at the University Hospital in Bonn.²⁵¹

Kenya's thriving hospitality sector, particularly in tourism and hotel management, presents an opportunity for skills-based labour migration partnerships. The country's high-quality training centre, in collaboration with the renowned Hotel Management School in Lucerne, Switzerland, provides a solid foundation for such partnerships. Building on this experience, Kenya can establish skills-based labour migration partnerships with destination countries.

The bilateral cooperation between Kenya and Switzerland exemplifies effective standardization and recognition of acquired skills, facilitating direct collaboration between technical schools and private companies on both sides. This model can be replicated in the hospitality sector and beyond.

► 10. Uganda's Migration and Human Mobility Dynamics

Uganda, like other selected countries of origin, has experienced significant population movements. As a country of origin, transit, and destination, Uganda exhibits complex migration dynamics.²⁵² Labour migrants from Uganda seek employment opportunities in regional and international markets. The Ugandan diaspora, comprising migrant workers residing abroad for at least six months, remits approximately USD 1 billion annually. This amount surpasses the earnings from any single Ugandan export.²⁵³ Migrant workers in Uganda contribute substantially to the economy. Meanwhile, Uganda serves as a transit point for regional migrants en route to other African and international destinations. As a destination country, Uganda hosts refugees, asylum seekers, and economic migrants fleeing regional instability. Consequently, Uganda faces multifaceted migration challenges. To address these issues the government has established directives, laws, policies, and regulations aimed at mitigating the negative consequences of migration and leveraging its positive effects on national development. The breakdown of migrants to the selected countries of destination for this study is as follows:

The table below presents the distribution of Ugandan migrants in selected destination countries, including temporary workers, permanent residents, and naturalized citizens, as reported in official national statistical counts.

251. Global-skills-partnerships.de. (2024). About – Global Skills Partnerships. [online] Available at: <https://global-skills-partnerships.de/en/about-2>.

252. <https://publications.iom.int/books/labour-migration-management-assessment-uganda?> The numbers could be much higher than that captured by the official statistics. IOM. 2013. Migration in Uganda: A Rapid Country Profile 2013. <https://global-skills-partnerships.de/en/about-2/>

253. <https://publications.iom.int/books/labour-migration-management-assessment-uganda?>

►Table 21.

Number of Ugandan Migrants in Selected Destination Countries

Australia ²⁵⁴	Canada ²⁵⁵	Japan ²⁵⁶	Korea ²⁵⁷
4,760	970	1,022	N/A

Bilateral Development Cooperation between Uganda and Countries of Destination

Uganda maintains bilateral development cooperation relations with the selected countries of destination, akin to Ethiopia and Kenya. Uganda receives support through the Canadian International Development Agency (CIDA), which channels funding to multilateral organizations, including UN agencies, the World Bank, and the African Development Bank.²⁵⁸ Additionally, Uganda benefits from cooperation with South Korea through the Korea International Cooperation Agency (KOICA), aimed at achieving Uganda's midterm national development goals and middle-income country status. This cooperation focuses on sustainable development, human resource development, and strengthening basic health capabilities.²⁵⁹ Australia, like Ethiopia and Kenya, provides support to Uganda's government through its Department of Foreign Affairs and Trade. Specifically, Uganda benefits from the Australia Awards Africa programme, which offers scholarships, training opportunities, and short executive courses for African professionals and emerging leaders. These initiatives are delivered through partnerships between Australian education institutions and local counterparts.²⁶⁰ In addition, Uganda receives development assistance from Japan through its Official Development Assistance (ODA) Loan project. This project prioritizes environmental safeguarding, rural income enhancement, improved living conditions, and targeted support to northern Uganda.²⁶¹

254. Data from Australian Bureau of Statistics 2022. Australian Bureau of Statistics 2022, Australia's Population by Country of Birth, ABS, viewed 24 February 2024, <<https://www.abs.gov.au/statistics/people/population/australias-population-country-birth/2022>>

255. No specified data in Canadian Census 2021 about citizens with Ugandan origins. Data from December, 2023 Permanent Residents in Canada https://www.ircc.canada.ca/opendata-donneesouvertes/data/EN_ODP-PR-Citz.xlsx and data from December, 2023: "Temporary Residents: Temporary Foreign Worker Program (TFWP) and International Mobility Program (IMP) Work Permit Holders – Monthly IRCC Updates - Canada – International Mobility Program Work Permit Holders by Country of Citizenship and Year in which Permit(s) became effective." https://www.ircc.canada.ca/opendata-donneesouvertes/data/EN_ODP-TR-Work-IMP_CITZ.xlsx

256. Japanese Immigration Services Agency 2023, Foreign Residents by Nationality/Region and by Residence Status (Purpose of Residence), <https://www.e-stat.go.jp/stat-search/file-download?statInfId=000040124400&fileKind=0>

257. There is no data from the Korean authorities to comprehensively account for the amount of Ethiopian, Kenyan, and Ugandan migrants in South Korea. This is due to the fact that the majority of migrants to South Korea are from China, Vietnam, Thailand, and Uzbekistan, with only an unclear and small number of migrants from African countries of origin. Not only does the annual Survey on Immigrants' Living Conditions and Labour Force not account for country-specific data of migrants' countries of origin, but also the data for migrants from Africa is combined with data for migrants from South America. # (There are 21,000 migrants from Africa and South America in South Korea.)

258. Government of Canada. Canada-Uganda Relations. <https://www.international.gc.ca/country-pays/uganda-ouganda/relations.aspx?lang=eng>

259. Korea International Cooperation Agency. (2017). Africa. [online] Available at: https://www.koica.go.kr/koica_en/3463/subview.do.

260. Australia Government Department of Foreign Affairs and Trade. Australia's Development Program to Sub-Saharan Africa. <https://www.dfat.gov.au/geo/africa-middle-east/development-assistance-in-sub-saharan-africa>

261. [jica.go.jp](https://www.jica.go.jp). (2024). Activities in Uganda □ Where We Work - JICA. [online] Available at: <https://www.jica.go.jp/english/over-seas/uganda/activities/index.html>.

Legal and Policy Frameworks Governing Migration

The government of Uganda has demonstrated a growing interest in migration policy, which is evident in several documents, including the draft National Diaspora Policy and the draft National Migration Policy. These initiatives aim to leverage migration for national development. Uganda has formulated policies regulating labour emigration, notably the 2005 Employment (Recruitment of Ugandan Migrant Workers Abroad) Act.²⁶² The Ministry of Gender, Labour and Social Development oversees labour migration, with the Ministry of Internal Affairs, Ministry of Foreign Affairs, and Uganda Immigration Service also playing key roles. Uganda has BLMAs with GCC states, including Saudi Arabia, UAE, and Qatar. The country's labour migration governance involves active social partners, including the key stakeholders in labour migration include: the Ministry of Gender, Labour and Social Development; Confederation of Private Employment Agencies, National Diaspora Services Board, Uganda Association for External Recruitment Agencies (UAERA); External Employment Unit, foreign recruitment agencies, and National Organization of Trade Unions (NOTU).²⁶³

The Ministry of Gender, Labour and Social Development, through its External Employment Unit, regulates private employment agencies facilitating labour externalization.²⁶⁴ The Ministry coordinates with embassies abroad to address migrant worker maltreatment and organize repatriation.

A 2022 ILO Fair Recruitment Initiative brief reports that the Uganda Association of External Recruitment Agencies signed an MoU with the National Organization of Trade Unions to promote decent work for migrant workers. This agreement aims to promote decent work in external employment, defend migrant workers' interests and voice, conduct joint orientation and awareness-raising activities, and review model contracts and BLMAs periodically.²⁶⁵

Sectors/ Occupations Relevant for Skills-Based Labour Migration Partnerships from Uganda

Uganda's situation parallels that of Ethiopia and Kenya, with various sectors and occupations aligning with labour market demands in destination countries. Currently, Uganda sends migrant workers to Gulf States in sectors such as hospitality, construction, homecare, transportation, cleaning and security guarding.²⁶⁶

These sectors, particularly hospitality, homecare, construction, and transportation, are also in demand in destination countries. Selecting key sectors for labour market needs in destination countries could initiate skills-based labour migration partnerships. However, this requires assessing the quantity and quality of potential migrant workers and investing in specialized skills development. Substantial preparations are necessary before establishing bilateral labour migration partnerships with new destination countries. Fortunately, Uganda's government has

262. Uganda Legal Information Institute. 2005. Employment (Recruitment of Ugandan Migrant Workers Abroad) Regulations. <https://ulii.org/akn/ug/act/si/2005/62/eng%402005-07-15>

263. International Organization for Migration. (2024). Labour Mobility and Social Inclusion | IOM Uganda | IOM Uganda. [online] Available at: <https://uganda.iom.int/labour-mobility-and-social-inclusion>.

264. International Labor Organization. 2022. Promising Practices for Fair Recruitment. https://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---migrant/documents/publication/wcms_840212.pdf

265. International Labor Organization. 2022. Promising Practices for Fair Recruitment. https://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---migrant/documents/publication/wcms_840212.pdf

266. Froilan Malit. 2014. Exploring Migration Governance Gaps: The Case of Ugandan Labor Migration to the UAE. International Gulf Organization Policy Report No. 2, https://www.academia.edu/8039146/Exploring_Migration_Governance_Gaps_The_Case_of_Ugandan_Labor_Migration_to_the_UAE

experience with BLAs with Gulf Cooperation Council (GCC) states.²⁶⁷ A crucial lesson learned is the importance of comprehensive pre-departure orientation for labour migrant workers.²⁶⁸

Uganda should leverage its existing instruments strategies, and experiences from previous bilateral partnerships. To achieve 'quick wins,' Uganda should focus on a limited number of sectors. Establishing the partnership's foundational pillars is essential, albeit time-consuming. A phased approach to partnership-building is recommended, as well as a focus on a limited number of sectors.

Skills Development Patterns in Uganda

The Government of Uganda established the Business, Technical and Vocational Education and Training (BTJET) programme under the 2008 BTJET Act.²⁶⁹ The Act aimed to promote skills development for employment, productivity and growth. Concurrently, the Uganda Vocational Qualifications Framework (UVQF) was established to develop occupational standards, assess, and certify acquired skills. However, the BTJET system faced significant challenges, including quality provision, access, equity, organisational effectiveness, and financial efficiency, leading to its abandonment after 10 years. The implementation of the BTJET system failed to produce the desired skilled workforce, with training institutions often failing to meet required standards and limited access for students. To address these challenges, the government launched the "Skilling Uganda" Strategic Plan (2011-2020).²⁷⁰

This paradigm shift aimed to transform the BTJET system into a comprehensive skills development framework for employment productivity, and growth. The strategy enhances skills relevance and productivity, improves skills quality, increases access and equity, strengthens organizational management, and enhances financing and internal efficiency.²⁷¹

The Ministry of Education and Sports (MoES) leads implementation and monitoring, with involvement from other ministries and private sector stakeholders. Uganda has also strengthened institutional mechanisms for social dialogue on BTJET issues through the Industrial Training Council (ITC), established in 1972 and revived in 2008.

The ITC convenes representatives from ministries, manufacturers in both formal and informal sectors, private training providers, and employees. The ITC's mandate encompasses advocating for Business, Technical and Vocational Education and Training (BTJET) reforms, participating in implementation, enhancing the public perception of BTJET, and aligning skills provision with labour market demands (Government of Uganda, 2019).²⁷²

The Government of Uganda recognizes skills development as vital to achieving its Vision 2040 development goals.²⁷³ To address this, the government has devised the comprehensive Skilling Uganda strategy. This strategy acknowledges the education and training system's inability to supply sufficient skilled workers, hindering development. The vision document outlines key

267. International Organization for Migration. 2015. Labour Migration Management Assessment: Uganda <https://publications.iom.int/books/labour-migration-management-assessment-uganda>

268. The virtual interview was provided by Mr. Martin Wandera on 5 December 2023. Mr. Martin Wandera is the director of Labour, Employment and OSH in Uganda.

269. The Uganda Gazette. 2008. The Business, Technical, Vocational Education and Training Act. <https://judiciary.go.ug/files/downloads/Act%20No.12%20of%202008%20Business,Technical,Vocational%20Education%20andTrainingAct.pdf>

270. Ministry of Education and Sports. Skilling Uganda: BTJET STRATEGIC PLAN 2011-2020

271. World Bank. 2015. Uganda Skills Development Project. <https://documents1.worldbank.org/curated/en/808711468167070990/pdf/PAD11110PAD0P10010Box391418B00UO090.pdf>

272. Government of Uganda. 2019. Uganda BTJET portal (Kampala, Ministry of Education and Sports). Available at: www.btvjet-uganda.org [05 Apr. 2019].

273. Government of Uganda. 2013. Uganda Vision 2040 (Kampala, National Planning Authority).

objectives, including reviewing education curricula, reforming the BTNET system's framework, and establishing a skills development fund to support human resource development in firms.²⁷⁴

The Government of Uganda anticipates that the revamped Business, Technical and Vocational Education and Training (BTNET) system will provide a substantial number of skilled employees, thereby boosting the country's productivity.²⁷⁵ Key sectors expected to benefit from this initiative include agro-processing, manufacturing, construction, transport and logistics, ICT, and hospitality, which are deemed crucial for national development. The reformed BTNET system aims to align skills development with labour market demands, recognizing that large-scale investment in skills development will yield tangible long-term results. To achieve this, Uganda has established numerous vocational training institutions, comprising 131 public and 670 private institutions as of 2020.²⁷⁶

Below is a list of a few leading vocational training institutes in the country:

- ▶ Redan Business and Vocational Institute, Makerere Kampala
- ▶ Ntinda Vocational Training Institute
- ▶ Uganda Petroleum Institute Kugumba
- ▶ Uganda Technical College, Kichwamba
- ▶ Bukalasa Agricultural Training Institute
- ▶ Uganda Technical College Elgon
- ▶ Uganda Technical College Bushenyi

Additionally, the Government of Uganda has established the Uganda Vocational Qualifications Framework (UVQF) under the 2008 BTNET Act. The framework facilitates the development of occupational standards and the assessment and certification of skills acquired by trainees. The UVQF comprises four levels, corresponding to increasing levels of complexity and qualification. Level 1 corresponds to junior certificates at lower secondary education level, while Level 4 corresponds to post-secondary diplomas.²⁷⁷

274. The Republic of Uganda. Ministry of Education and Sports. The Technical Vocational Education and Training Policy. https://www.education.go.ug/wp-content/uploads/2020/05/FINAL-TVET-POLICY_IMPLEMENTATION-STANDARDS_IMPLEMENTATION-GUIDELINES_19TH_MAY_2020.pdf

275. International Labor Organization. 2020. State of Skills, Uganda. https://www.ilo.org/wcmsp5/groups/public/---ed_emp/--emp_ent/documents/genericdocument/wcms_736694.pdf

276. Unesco.org. (2024). Dynamic TVET Country Profiles. [online] Available at: <https://unevoc.unesco.org/home/Dynamic+TVET+Country+Profiles/country=UGA>.

277. International Labor Organization. 2020. State of Skills, Uganda. https://www.ilo.org/wcmsp5/groups/public/---ed_emp/--emp_ent/documents/genericdocument/wcms_736694.pdf

► **Table 22.**
The Uganda Vocational Qualifications Framework (UVQF)

Level	Equivalent
UVQF level 5	Diploma in Training Institution Management/Higher National Diploma
UVQF level 4	Diploma in Vocational Training Instruction/Technical National Diploma
UVQF level 3	Master Craft Certificate
UVQF level 2	National Certificate
UVQF level 1	Polytechnic Certificate
Worker's PAS	Worker's Practically Acquired Skills (PAS). The Ugandan Ministry of Education and Sports officialy uses the Worker's PAs certificate to acknowledge these skills acquired through on-the-job training, without formal education. The assessment of professional skills is categorized into three proficiency levels: 1. 'The person works under supervision'. 2. The person is able to work under moderate supervision and with support'. 3. The person works independently.
Modular Transcript	Partial qualification of the occupation in formal learning

Source: This table is adapted from the Skilled Crafts and Trades Network 4 Africa, 2020 ²⁷⁸

Uganda has numerous TVET institutions offering skills development programmes across various sectors and occupations. Due to the vast number of institutions, the review focuses on three sectors: transportation, construction, and homecare. These sectors were selected to assess Uganda's readiness for labour markets abroad, specifically examining enrolment and graduation numbers per sector per year, skills levels attained by students upon completion of training, and employment and unemployment rates among alumni. The objective was to determine if Uganda possesses a sufficient pool of skilled workers matching employment demands in destination countries. However, unlike Ethiopia, the reviewed sectors in Uganda lack essential data to accurately assess readiness for destination labour markets. This is due to insufficient data on enrolment, graduation, skill levels, and employment outcomes, compounded by the lack of sector-specific organizations, unlike Kenya. This data gap hinders skills-matching and labour mobility partnerships. Furthermore, Uganda lacks specialized technical centres focused on training individuals for overseas employment.

Uganda is facing a unique challenge in increasing jobs in productive sectors, shifting people from agriculture to services and industry, while enhancing agricultural productivity. The government launched a skills development initiative in 2015, targeting construction, manufacturing, and agriculture sectors to address this issue. ²⁷⁹

However, implementation weaknesses hinder progress. Uganda's skills training faces several challenges. Fragmented governance and limited coordination between ministries and private sector organizations hinder effective skills training provision and quality assurance. Insufficient social partner dialogues and institutional mechanisms result in training that often fails to meet

278. [Brief description of the Technical and Vocational Education \(TVET\) system in Uganda](#)

279. Ministry of Education and Sports. (2021). Uganda Skills Development Project (USDp) - Ministry of Education and Sports. [online] Available at: <https://www.education.go.ug/uganda-skills-development-project-usdp/>.

labour market needs. According to a Ugandan expert, the primary issue is not skills mismatch but rather inadequate job opportunities due to limited labour market absorption capacity.

In response, the government has launched the National Employment Strategy 2023-2028 and action plan 2023-2025,²⁸⁰ aiming to substantially improve employment opportunities and job growth.²⁸¹ Additional challenges include inadequate financing for vocational training, lack of centralized labour market information systems, and skills forecasting capacity. A skills and job gap persists, making labour market transition difficult. Ensuring quality training in BTET centres is also crucial.²⁸²

Conclusion

Uganda has various sectors and occupations relevant to labour markets in the destination countries. However, these countries primarily require migrant workers with medium and high skills, rather than low-skilled workers.

Destination countries have existing bilateral labour migration agreements with origin countries in their regions, facilitating significant migratory flows of low and semi-skilled workers. Therefore, investing in skills development is crucial for Uganda to deploy migrant workers in medium and high-skilled occupations.

This strategic approach can foster skills-based labour migration partnerships with destination countries. Many OECD countries face shortages of skilled labour across diverse economies, leading to intense competition for working-age skilled workers.

The Government of Uganda should consider this when exploring new destinations for migrant workers beyond the Gulf States. Establishing skills-based labour migration partnerships requires careful planning and coordination.

Initiating dialogue with destination country governments is a crucial first such engagement enables the government of Uganda to understand labour market needs in destination countries and respond accordingly.

This includes identifying priority sectors and investing in relevant skills development to prepare Uganda for labour market demands in destination countries within a foreseeable timeframe.

280. Eprcug.org. (2023). National Employment Strategy 2023-2028 and Action Plan 2023-2025 – Economic Policy Research Centre. [online] Available at: <https://eprcug.org/eprc-highlights/national-employment-strategy-2023-2028-and-action-plan-2023-2025/>.

281. According to the interviewee, the national employment policy of Uganda is to ensure that enough and decent local jobs are created making it unnecessary to export labour migrant workers abroad in the long run

282. International Labor Organization. 2020. State of Skills, Uganda. https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_ent/documents/genericdocument/wcms_736694.pdf



PART

3

FEASIBILITY OF SKILLS-BASED LABOUR MIGRATION PARTNERSHIPS

The study's findings indicate that destination countries are experiencing shortages of working-age skilled labour due to demographic shifts, including declining birth rates and ageing populations. Additionally, structural changes in the global economy have led to a growing service sector, including hospitality services and the care economy.

Multiple sectors, such as construction, agriculture, IT, machinery operations, and transportation, require migrant workers with various skill levels. However, destination countries exhibit a strong preference for recruiting migrant workers with medium and high skills, as well as specialized technical skills for maintaining and repairing machinery.

The study reveals that all destination countries have established BLMA's with numerous origin countries in their respective regions. For example, Canada has 12 bilateral agreements, Australia has 10, and Japan and South Korea each have 16.

These existing partnerships facilitate labour mobility and may create competition for new destinations. Specifically, the deployment of low and semi-skilled migrant workers may face competition from regional countries that are already collaborating with destination countries. This aspect should be considered when forging viable partnership agreements to ensure effective skills-based labour migration partnerships.

Establishing Skills-Based Labour Migration Partnerships

Countries of origin in East Africa and the Horn of Africa region are exploring skills-based labour migration partnerships with select destination countries. This initiative is feasible due to the diverse sectors and occupations in destination countries' labour markets, which can absorb skilled migrant workers.

However, establishing such partnerships requires strategic planning, concerted effort, and continuous engagement to build trust and confidence between parties, institutions, and governments. Developing a comprehensive strategy and emulating effective practices from other countries are essential.

The study's findings provide evidence-based data highlighting potential steps for establishing skills-based labour migration partnerships. It is crucial that these partnerships complement domestic labour market needs and enhance skills development for both domestic and international labour markets.

Furthermore, partnerships must promote fair and sustainable labour migration management through joint cooperation between origin and destination countries. Regular evaluation and monitoring of partnership implementation are critical to ensure mutually beneficial outcomes.²⁸³

Forging skills-based labour migration partnerships requires a gradual and multi-faceted process. Transitioning from general labour migration to targeted skills-based partnerships demands time, policy actions, and concerted efforts from various stakeholders. On the policy front, governments of countries of origin must engage with destination countries through diplomatic and bilateral channels to initiate dialogue. Although time-consuming, this high-level engagement is crucial. At the institutional level, creating a conducive environment for public and private institutions to interact and collaborate directly is essential. Practically, deploying medium and high-skilled labour migrant workers to new destinations requires investing in skills development aligned with destination countries' labour market needs. This entails shifting from low-skilled migration and allocating funding to key sectors and occupations.

283. Skills for Trade and Economic Diversification (STED) (SKILLS) (ilo.org)

▶ ANNEX I: LIST OF GOVERNMENT OFFICIALS INTERVIEWED

1. Mr. Jacob Gatimu, Labour Officer at the Ministry of Labour in Kenya
2. Tilahun Bejital Zellelew (PhD), Focal Person, Ethiopia's Chairpersonship East and Horn of Africa Regional Ministerial Forum on Migration (RMFM), FDRE Ministry of Labor and Skills
3. Mr. Martin Wandera, Director of Labour, Employment and OSH in Uganda
4. Mrs. Jane W. Kamau, Director Industrial Training & Skills Development of the National Industrial Training Authority of Kenya
5. Mr. Azmera Kabede, Senior TVET advisor to State Minister, Ministry of Labour and Skills of the Government of Ethiopia

▶ ANNEX II: GUIDING QUESTIONNAIRE FOR THE STUDY

- ▶ In general, what are the current patterns and trends in labour migration schemes in countries of destination?
- ▶ What legal and policy frameworks are in place governing human mobility in general and recruitment procedures and handling of migrant workers on both sides?
- ▶ What sort of legal migration pathways currently exist between the origin and countries of destination that can be expanded?
- ▶ How are the labour and employment markets organized, and what stakeholders are at play for both origin and countries of destination?
- ▶ What are the main sectors/occupations in which countries of destination hire migrant workers the most?
- ▶ What are the key challenges encountered in the mobility programmes in which multiple stakeholders are involved who have not been accustomed to working together in the past and how have they been overcome in the process?
- ▶ What forms of right-based labour policies (social rights) exist for labour migrants once they arrive in their countries of destination?
- ▶ How can policies ensure that potential migrant workers get access to reliable labour migration information from different sources (government agencies, private institutions, employers, etc) on skill levels, occupations, and sectors with potential opportunities for decent employment?
- ▶ How can public and private sectors collaborate in the organisation and the implementation of skills-based labour migration programmes from both sides?
- ▶ How can established dialogue platforms on both sides be utilized to manage and mediate interests and expectations, and improve communication and coordination among diverse stakeholders involved in the labour mobility partnerships?
- ▶ What actions are needed to increase policy awareness in countries of origin with regard to skills and labour shortages in the selected countries of destination?
- ▶ What are the skills development patterns in the countries of origin and how they were designed to upscale skill levels in general?
- ▶ or skills-based partnerships with any country of destination on this matter?

▶ ANNEX III: NATIONAL CLASSIFICATION SYSTEM OF SKILLS LEVELS

Australia

Skill level 1

Occupations at Skill level 1 have a level of skill commensurate with a bachelor degree or higher qualification. At least five years of relevant experience may substitute for the formal qualification. In some instances, relevant experience and/or on-the-job training may be required in addition to the formal qualification.

Skill level 2

Occupations at Skill level 2 have a level of skill commensurate with one of the following:

- ▶ NZ Register Diploma or
- ▶ AQF Associate Degree, Advanced Diploma or Diploma.

At least three years of relevant experience may substitute for the formal qualifications listed above. In some instances, relevant experience and/or on-the-job training may be required in addition to the formal qualification.

Skill level 3

Occupations at Skill Level 3 have a level of skill commensurate with one of the following:

- ▶ NZ Register Level 4 qualification
- ▶ AQF Certificate IV or
- ▶ AQF Certificate III, including at least two years of on-the-job training.

At least three years of relevant experience may substitute for the formal qualifications listed above. In some instances, relevant experience and/or on-the-job training may be required in addition to the formal qualification.

Skill level 4

Occupations at Skill level 4 have a level of skill commensurate with one of the following:

- ▶ NZ Register Level 2 or 3 qualification or
- ▶ AQF Certificate II or III.

At least one year of relevant experience may substitute for the formal qualifications listed above. In some instances, relevant experience may be required in addition to the formal qualification.

Skill level 5

Occupations at Skill level 5 have a level of skill commensurate with one of the following:

- NZ Register Level 1 qualification
- AQF Certificate I or
- Compulsory secondary education.

For some occupations a short period of on-the-job training may be required in addition to or instead of the formal qualification. In some instances, no formal qualification or on-the-job training may be required.

Canada²⁸⁴

►Table 23.
National Occupational Classification (NOC) 2021 Version

NOC 2021 V1.0 Broad Category - Occupation	when the first digit is...
BOC 0 - Legislative and senior management occupations This broad category comprises legislators and senior management occupations.	0
BOC 1 - Business, finance and administration occupations This broad category comprises specialized middle management occupations in administrative services, financial and business services and communication (except broadcasting), as well as professional occupations in financial and business; administrative and financial supervisors and specialized administrative occupations; administrative occupations and transportation logistics occupations; and office and administrative support and supply chain logistics occupations.	1
BOC 2 - Natural and applied sciences and related occupations This broad category comprises occupations in natural sciences (including basic and applied sciences and experimental development), engineering, architecture and information technology. These occupations cover specialized middle management occupations in engineering, architecture, science and information systems; professional occupations in natural sciences (basic and applied sciences and experimental development); and technical occupations related to natural sciences (including basic and applied sciences and experimental development).	2
BOC 3 - Health occupations This broad category comprises specialized middle management occupations in health care, as well as occupations concerned with providing health care services directly to patients (professional and technical occupations in health) and occupations that provide support to health services.	3
BOC 4 - Occupations in education, law and social, community and government services This broad category comprises managers in public administration, in education and social and community services and in public protection services, as well as occupations concerned with teaching, law, counselling, conducting social science research, developing government policy, and administering government and other programs, and related support occupations.	4

284. Introduction to the National Occupational Classification (NOC) 2021 Version 1.0. Accessed 15 February 2024, <https://www.statcan.gc.ca/en/subjects/standard/noc/2021/introductionV>

BOC 5 - Occupations in art, culture, recreation and sport This broad category comprises specialized middle management occupations in art, culture, recreation and sport, as well as professional, technical, support and other occupations concerned with art and culture (including the performing arts, film and video, broadcasting, journalism, writing, creative design, libraries and museums), recreation and sports.	5
BOC 6 - Sales and service occupations This broad category comprises middle management occupations in wholesale and retail trade, and customer services, as well as occupations concerned with wholesale and retail sales, and customer, personal and support service occupations related to a wide range of trade and service industries, such as accommodation and food services, travel, tourism and cleaning services.	6
BOC 7 - Trades, transport and equipment operators and related occupations This broad category comprises middle management occupations in trades, transportation and equipment, as well as occupations such as technical trades and transportation officers and controllers; general trades; mail and message distribution, other transport equipment operators and related maintenance workers; and helpers and labourers and other transport drivers, operators and labourers.	7
BOC 8 - Natural resources, agriculture and related production occupations This broad category comprises middle management occupations in natural resources, agriculture and related production, as well as occupations concerned with supervision and equipment operation in the natural resource-based sectors of mining, oil and gas production, forestry and logging, agriculture, horticulture and fishing. Harvesting, landscaping and natural resources labourers are also included. Most occupations in this category are industry specific and do not occur outside of the primary resources industries.	8
BOC 9 - Occupations in manufacturing and utilities This broad category comprises middle management occupations in manufacturing and utilities, as well as occupations concerned with supervisory, production and labouring in manufacturing, processing and utilities.	9
The NOC 2021 V1.0 Training, Education, Experience and Responsibility (TEER)	when the second digit is...
Management - TEER	0
Completion of a university degree (bachelor's, master's or doctorate); or Previous experience and expertise in subject matter knowledge from a related occupation found in TEER 2 (when applicable).	1
Completion of a post-secondary education program of two to three years at community college, institute of technology or CÉGEP; or Completion of an apprenticeship training program of two to five years; or Occupations with supervisory or significant safety (e.g. police officers and firefighters) responsibilities; or Several years of experience in a related occupation from TEER 3 (when applicable).	2
Completion of a post-secondary education program of less than two years at community college, institute of technology or CÉGEP; or Completion of an apprenticeship training program of less than two years; or More than six months of on-the-job training, training courses or specific work experience with some secondary school education; or Several years of experience in a related occupation from TEER 4 (when applicable).	3
Completion of secondary school; or Several weeks of on-the-job training with some secondary school education; or Experience in a related occupation from TEER 5 (when applicable).	4
Short work demonstration and no formal educational requirements.	5

South Korea²⁸⁵

►Table 24.

Korean Standard Classification of Occupations (KSCO)

Classification Structure(2017)

Major group (1 digit)	Sub-major group (2 digit)	Minor group (3 digit)	Unit group (4 digit)	Detailed occupation (5 digit)
Total	52	156	450	1,231
1. Managers	5	16	24	82
2. Professionals and Related Workers	8	44	165	463
3. Clerks	4	9	29	63
4. Service Workers	4	10	36	80
5. Sales Workers	3	5	15	43
6. Skilled Agricultural, Forestry and Fishery Workers	3	5	12	29
7. Craft and Related Trades Workers	9	21	76	198
8. Equipment, Machine Operating and Assembling Workers	9	31	65	220
9. Elementary Workers	6	12	24	49
A. Armed Forces	1	3	4	4

285.The Introduction page of Korean Standard Classification of Occupations, Statistics Korea. Accessed on 15 February 2024
http://kssc.kostat.go.kr/ksscNew_web/ekssc/common/selectIntroduce.do?part=2&top_menu=101&bbsId=isco_s&categoryNameCode=030&categoryMenu=001#

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