International Labour Organization

Improved Labour Migration Governance

Labour market assessment

Market trends and opportunities in Ethiopia and the Gulf

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Foreword

Ethiopia is striving towards economic growth and development to alleviate and ultimately eradicates poverty. The Ethiopian economy has grown with average annual growth of 8.2% during the Growth and Transformation Plan II (GTP II).[1] However, the economic growth has not been job rich and the labour market has not been able to absorb the new labour force entrants entering the labour market. Consequently, the urban unemployment rate is high, in which the youth and female are the most affected. There seem to be a mismatch between the labour market demand and supply in terms of skills and knowledge of the new graduates. Unemployment is one of the main driving force for youth to look for work beyond the local labour market.

Ethiopians who are interested in overseas employment has shown a steady growth, and this increasing labour migration has been mostly to the Middle East and Gulf Cooperation Council (GCC) countries. Migrant workers especially those who migrate regularly are mainly concentrated in the domestic work sector. Though, there has been persistent increase in the number and volume of labour migrants to the Middle East, according to this assessment the share of Ethiopians remains low in major destination countries. Lack of skill is one the major factors for Ethiopian migrants' concentration in the low-skilled and low-paying job.

Due to unemployment and labour surplus in the country as well as the interest of the youth to work abroad, the Ethiopian government is making an effort to diversify sectors and countries for Ethiopian migrant workers, including skilled and semi-skilled workers. To ensure evidence based policy-making, the Ministry of Labour and Social Affairs in partnership with the ILO conducted this "Labour Market Assessment: Trends and Opportunities in Ethiopia and in the Gulf". The Assessment evaluated possible labour market opportunities for Ethiopian workers in Ethiopia as well as different labour receiving countries. It further identified prospective employers, sectors and occupations to inform skill development programs with the ultimate objective of addressing skilled labour force demand in the local labour market in Ethiopia and in major destination countries.

Accordingly, the findings of the Labour Market Assessment indicated that the more skilled (semi and highly skilled) Ethiopian migrant workers are the more opportunity and competitive they will become, and get jobs in diversified sectors and occupation. Additionally, diversification of potential market on one hand, and improving the employability of Ethiopian workers through enhancing technical and vocational skills on the other will have a positive outcome not just for fostering regular migration, but also to enhance access to decent employment and sustain the demand and supply of Ethiopian labour market.

[1] National Bank of Ethiopia: Annual Report 2019-2020

Moreover, the National Employment Policy and Strategy has clearly unveiled the importance of the harmonization of macro and sectoral policies and strategies for matching of the labour supply and demand. To this end, there is a need to evaluate the national curriculum of middle and high level education and training programs, including practical and core skills with respect to contemporary labour market situations in order to align the curriculum to the labour market demand. Thus, the Ministry of Labour and Social Affairs will work closely with relevant government organizations in the area of General Education, Technical and Vocational Education and Training, as well as the Higher Education to overcome the labour market deficit.

The assessment and findings will complement government interventions concerning labour migration and strengthen the impact of skills development interventions, which will take into consideration the local labour market demand, and potential destination counties need for skilled labour force. The assessment will also be a starting point for further study to inform growing and future needs of the labour market and additional skill development programs. This calls upon all relevant actors and government to tap into potential markets to diversify sectors and occupations for Ethiopian labour migrants with a special focus on expanding opportunities for Ethiopians in Ethiopia.

Finally, we would like to take this opportunity to extend our gratitude and appreciation to United Kingdom's Department for International Development for funding the project "Improved Labour Migration Governance to Protect Migrant Workers and Combat Irregular Migration in Ethiopia" through which this Labour Market Assessment is conducted.

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Executive summary

Project and survey background

This labour market assessment (LMA) has the objective of better understanding the occupations and skills in demand in Ethiopia and major labour receiving countries such as the countries of the Middle East. The overall objective of the ILO project on improved labour migration governance to protect migrant workers and combat irregular migration was to address the decent work deficits and improve labour migration governance in Ethiopia. This LMA represents a key initiative to determine skills profiles, gaps and surpluses, and understand how skills development initiatives can be framed and improved in order to better meet labour market demand and economic opportunity in Ethiopia and key destination countries for Ethiopian migrant workers.

The study examined employment trends and employer needs in Ethiopia and three destination countries: Saudi Arabia (KSA), Kuwait and the United Arab Emirates (UAE). In the Gulf, employers of migrant workers were interviewed in capital cities. In Ethiopia, employers in key growth sectors were interviewed in Addis Ababa City Administration and Amhara, Oromia and Tigray Regional States. A number of key stakeholders were also interviewed, such as key ministries and recruitment agents. Key stakeholder interviews were carried out in Ethiopia to look at the in-country situations with respect to employment and working conditions as well as support services available to migrant workers. An extended desk review was also conducted to explore market and job trends in South Korea and the Czech Republic.

The findings of this study indicate that in Ethiopia the labour market is moving away from traditional, rural-based work towards urban-based, industrial manufacturing and service sectors. The requirements emerging from the transformation of Ethiopia's labour market include a need for improved training; education and upskilling of workers; improved linkages of employers to the labour market; an increased focus on practical training in technical colleges and high schools; the further development of digital literacy education, and a revaluation in how Ethiopian enterprises perceive local, Ethiopian workers. Further, recruitment practices in Ethiopia require improvement so that employers are better able to source information about low-, medium- and high-skilled workers. The informal kinship/friendship recruitment system needs to be formalized and improved. Employment training also needs to be improved, moving from usually informal, "on-the-job" training that contributes to low productivity and time costs to formal training that positively impacts enterprises and the workforce.

Labour market trends in Ethiopia

Ethiopia's labour market is currently changing from being primarily agricultural-based to a mixed agriculture-industrial economy. These changes are reflected in the changing demands of the labour market for medium and high-skilled workers. Although the country's economy is growing, there remains a large domestic labour pool that is not being efficiently connected to employment. In other words, the country's labour market has the potential to absorb larger numbers of low- and medium-skilled labour, as well as an apparent growing demand for high-skilled labour.

As the Ethiopian economy grows, the country's labour market is also transforming, with increased investment in human capital. The findings of this research indicate a shift in the types of workers in demand for the emergent post-agrarian Ethiopian economy. Specifically, there is an emerging demand for low-skilled, medium-skilled and high-skilled workers, but increasing demand and attendant undersupply for medium- and high-skilled workers across the three sectors surveyed.

As the transformation in the Ethiopian labour market continues to develop, there will be a growing demand for particular skills in employees. For example, in the construction sector, employers will require high-skilled workers such as engineers and site managers, as well as workers with 'core skills', such as the ability to listen and language skills. In agriculture, machine operators (medium/high-skilled role), will also be in high demand, while low-skilled positions like general labourers will be comparatively in less demand, but still undersupplied. In manufacturing, there will be a high demand for medium- and high-skilled positions such as machinists, assemblers and technicians.

Labour market trends in the Middle East

Governments in the Middle East region (ME) are looking to diversify their economies and move away from relying on natural resources to becoming a knowledge economy. As the economies of the ME region shift, labour markets will also change in terms of who works and what kind of work people do. Currently, foreign nationals make up the majority of the population in the ME countries discussed in this study. Although governments in KSA, Kuwait and UAE are encouraging more locals to enter the workforce, the demand for migrant workers will continue to grow over the next ten years in the Gulf Cooperation Council states (GCC), with demand strongest in the construction, care work, hospitality and agricultural sectors. In particular, an ageing population, low fertility rates and more women entering the workforce in these countries mean that a further 2.1 million migrant domestic workers will be required, and the meaning of care work will shift from housekeeping to home-paid care. This shift in regional demographics will require more specialized training for care workers as the focus of domestic work moves to working with children, the elderly and the disabled.

Across each of the three countries – KSA, UAE and Kuwait – skills matching and skills recognition will be a high priority as enterprises seek to find the right person for the right position in a timely and cost-effective manner. Specific medium-skilled and high-skilled jobs, such as machine operators, plumbers and electricians, will be highly sought after. Workers should be equipped with the skills they need before they arrive in the GCC to fill these roles successfully.

Selected findings

Ethiopia's transforming labour market requires upskilled workers

Changes in Ethiopia's economy, as it moves from agricultural to industrial, are reflected in changing demands of the labour market for medium- and high-skilled workers. Ethiopia's economy is growing, but there remains a large domestic labour pool that is not being efficiently connected to employment.

Greater investment needed in Ethiopia's human capital

The findings of this research indicate a broad demand for low-skilled, medium-skilled and high-skilled workers, but increasing demand and attendant undersupply for medium- and high-skilled workers across construction, manufacturing and agriculture.

Negative perceptions of Ethiopian workers

Ethiopian enterprises tend to have a negative perception of Ethiopian workers. The perception that Ethiopian workers are inferior to foreign workers means that it is possible that local workers are overlooked in favour of migrant workers.

Frustration with skills levels in Ethiopia's labour market

Interviewees expressed frustration with the limited skills available in the Ethiopian labour market while suggesting a need to further improve both the quality of education available to potential recruits and the matching of skills between the education and the job market. A consensus was voiced on the need for more investment into supporting technical and vocational education and training (TVET).

Gendered opportunities for Ethiopia's workforce

Employers across the three sectors of construction, agriculture and manufacturing agreed that there are skills gaps in the Ethiopian labour market and a broad undersupply of workers across sectors and skill levels. It would benefit the national economy to encourage Ethiopian women to fill the skills gaps in the local labour market. Training in core skills would likely enhance the employability of Ethiopian women to enter the labour market in positions with high demand, both within the domestic labour market and overseas.

Upskilling and skills matching creating currently unsatisfactory

Within Ethiopia and between Ethiopia and the ME region, skills matching and skills recognition will be a high priority as our findings show that training, across sectors and regions, is limited to learn-as-you-go, on-the-job training.

Greater opportunities in the Gulf for Ethiopian migrant workers

Overseas, in KSA, UAE and Kuwait, Ethiopian workers appear to occupy a relatively low share of the job market compared to workers from India, Bangladesh and Pakistan. The Ethiopian Government should work to address this shortcoming by working with GCC governments to encourage the recruitment of Ethiopian workers as well as promoting work for Ethiopian men and women in the Gulf. For women, in particular, there are growing opportunities for medium- and highly skilled care workers.

Greater demand for middle and high-skilled workers in the Gulf

As GCC governments invest more capital in the digitalization of labour, specific middle-skilled and high-skilled jobs skills will become highly sought after. In the construction and manufacturing sectors, roles such as plumbers, machine operators and electricians are currently in high demand, but in low supply. In contrast, there will continue to be a low demand but high supply for drivers, site managers and general labourers, and increased demand for agricultural labour.

Recommendations

Promote labour market opportunities in Ethiopia, especially in key growth sectors such as construction, agriculture and manufacturing

These sectors are predicted to grow over the next few years, and demand for workers is expected to be high. Promoting them by connecting workers with potential employers will serve as a win-win and also means Ethiopia will become less dependent on migrant workers.

Promote opportunities for women to find employment within Ethiopia

It is expected that women will continue to be employable across sectors in Ethiopia. As such, connecting women to employment opportunities within the country should be a "first-tier" option.

Support the need to develop medium- and highly-skilled labour in Ethiopia

Although there is still a demand for low-skilled labour in some sectors, there is a distinct shift towards favouring a higher-skilled labour force. The local workforce needs to be better prepared for these changes.

Strengthen the formal recruitment system in Ethiopia to better link employers with potential workers

Currently, employers rely heavily on informal modes of recruitment, including drop-ins and referrals. Relatively few employers in Ethiopia make use of formal recruitment services. Consequently, employers often do not find the right workers for the right jobs.

Promote and educate workers on labour market policy

Migrant-targeted education and pre-migration information would contribute to ensuring a safer and more beneficial work and migration experience for workers seeking employment in and outside of the country.

Increase access to vocational training for upskilling Ethiopian workforce

Review existing vocational training programmes to determine how suitable and accessible they are for Ethiopian job seekers, in particular low-skilled workers, and determine how existing training programmes can be made more suitable to meets the needs of these workers.

Promote labour market opportunities in the Gulf

Building a labour force with stronger skills will open up more opportunities for potential migrants wanting to work in the Gulf. Compared to other countries, Ethiopia holds a relatively small share of jobs in KSA, Kuwait and UAE. In particular, construction, agriculture and a mix of other sectors are currently experiencing an undersupply of medium- and high-skilled labour.

Promote job opportunities for women to work as care workers in the GCC

Due to an ageing population and more GCC women entering the workforce, there is currently a high demand and an undersupply of medium- and high-skilled care workers who can look after elderly persons and those who are in poor health. This is another gap that can be filled by training Ethiopian workers, especially women.

Develop a TVET programme with a focus on care work

Ethiopian women, in particular, are often employed as domestic workers in the Gulf. The nature of domestic work means women have limited opportunities for social interaction outside of the workplace and thus encounter a greater risk of abuse. Therefore, implementing this programme to bridge the skills gaps is essential for women to be able to explore greater opportunities in the destination country. However, as care workers, additional skills will need to be developed, including cooking, healthcare and language skills. Targeted training in these areas will increase the employability of potential women migrant workers and could contribute to these individuals commanding a higher wage.

Strengthen bilateral agreements with ME countries, focusing on improving formal contracts and not allowing employers to withhold passports and other personal documents

Currently, Ethiopian workers are vulnerable to exploitation, especially care workers employed in private employment. Creating and enforcing regulations with regard to the employer-employee relationship will contribute to reducing opportunities for such exploitation. Further, the bilateral agreements should not be limited to low-skilled migrant workers but should be drafted to include medium-skilled migrant workers as well.

Explore other markets

There is the potential to explore the employment of Ethiopian care workers and domestic workers in the Czech Republic. The chance of success in finding employment is expected to be greater if they can converse in English.

Terms & concepts used in this report

Migrant worker

A migrant worker is a person who has migrated from one country to another with the intent of being employed otherwise than on their own account. This includes any person regularly admitted as a migrant worker (based on ILO Migrant Workers (Supplementary Provisions) Convention, 1975 (No. 143), Article 11(1)).

A person who is engaged in a remunerated activity in a State of which they are not a national (based on the International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, 1990).

For statistical purposes, international migrant workers are defined as all persons of working age present in the country of measurement which are in one of the following two categories:

(a) usual residents: international migrants who, during a specified reference period, were in the labour force of the country of their usual residence, either in employment or in unemployment;

(b) not usual residents, or non-resident foreign workers: persons who, during a specified reference period, were not usual residents of the country but were present in the country and had a labour attachment to the country, i.e., were either in employment supplying labour to resident producer units of that country or were seeking employment in that country.[2]

Particular categories of international migrant workers include:[3]

(a) frontier workers;

(b) seasonal workers;

(c) itinerant workers;

(d) project-tied workers;

(e) specified-employment workers;

(f) self-employed workers;

(g) seafarers, including fishers employed on a vessel which is registered in the country of measurement, of which the workers are not nationals;

(h) workers employed on an offshore installation that is under the jurisdiction of the country of measurement, of which the workers are not nationals;

(i) foreign domestic workers engaged by resident employers;

(j) foreign students working or seeking work or combining work and study;

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[2] ILO, *Guidelines concerning statistics of international labour migration*, ICLS/20/2018/Guidelines, 20th International Conference of Labour Statisticians, Geneva, 10–19 October 2018.

[3] ILO, *Guidelines concerning statistics of international labour migration.*

(k) international travellers on tourism trips whose main purpose is to be employed;

(l) working or seeking work refugees and asylum-seekers;

(m) forcibly displaced persons across borders.

(n) persons trafficked across international borders for forced labour or labour exploitation.

Return migrant worker

The concept of **return international migrant workers** is intended to provide a basis for measuring the work experience of persons returning after being international migrant workers abroad. For the country of measurement, return international migrant workers are defined as all current residents of the country who were previously international migrant workers in another country or countries. In particular:

(a) the measurement of return international migrant workers does not depend on the current labour force status of persons in the country of current residence. Return international migrant workers may include persons currently outside the labour force or outside the potential labour force, or persons no longer engaged in any form of work in the country of current residence;

(b) return international migrant workers include those current residents of the country of measurement who were working aboard without being usual residents of the country in which they worked (corresponding to category 14(b) (not usual residents) of international migrant workers as given above);

(c) it is recommended that the chosen minimum duration of labour attachment abroad for a person to be considered as a return international migrant worker be relatively short, such as 6 months, calculated on a cumulative basis for workers with repeated spells of migration;

(d) it is recommended that the reference period for the date of return, i.e., the maximum time elapsed since the return of the person to the country of current residence for them to be included in the count (stock) of return international migrant workers in that country, should be relatively long, such as last 12 months or last 5 years, or it may be left open and then classified by date of return.[4]

Regular migrant worker

A migrant worker or members of their family authorized to enter, to stay and to engage in a remunerated activity in the State of employment pursuant to the law of that State and to international agreements to which that State is a party (based on International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, 1990).

Migrant worker in an irregular situation

People who enter or work in a country other than their legal home without legal authorization, who are thus treated as illegal, clandestine, undocumented or irregular. However, "illegal

[4] ILO, *Guidelines concerning statistics of international labour migration*.

migrants" is now an unacceptable term due to its connotation of criminality (International Labour Conference, 92nd Session, 2004. Report VI. *Towards a Fair Deal for Migrant Workers in the Global Economy,* para. 36). Migrants are considered to be in an irregular or non-documented situation if they are unauthorized to enter, to stay and to engage in a remunerated activity in a state of employment pursuant to the law of that State and to international agreement to which that State is a party (International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, article 5).

Low-skilled

ILO Statistics classifies low-skilled workers (levels 0–2) as workers engaged in elementary occupations, in accordance with International Standard Classification of Occupations (ISCO) Broad Occupations Groups. These workers are employed in occupations that "consist of simple and routine tasks which mainly require the use of hand-held tools and often some physical effort" (ISCO, Introduction to occupational classifications, ILO Bureau of Labour Statistics).

Medium-skilled

ILO Statistics classifies workers at a medium-skill level (level 2) as "skilled manual workers" in accordance with ISCO Broad Occupations Groups. This work is characterized by routine and repetitive tasks in cognitive and production activities. These include workers in occupations such as skilled agriculture and fishery, clerical work, craft and related trades and plant, machine operators and assemblers. (ISCO, Introduction to occupational classifications, ILO Bureau of Labour Statistics).

Typically involve the performance of tasks such as operating machinery and electronic equipment; driving vehicles; maintenance and repair of electrical and mechanical equipment; and manipulation, ordering and storage of information.

For almost all occupations, the ability to read information such as safety instructions, to make written records of work completed, and to accurately perform simple arithmetical calculations is essential. Many occupations at this skills level require relatively advanced literacy and numeracy skills and good interpersonal communication skills. In some occupation, these skills are required for a major part of the work. Many occupations at this skill level require a high level of manual dexterity.[5]

High-skilled

ILO Statistics classifies two levels of highly-skilled workers (levels 3 and 4), in accordance with ISCO Broad Occupations Groups. These workers include managers (skill levels 3 and 4), as well as professionals (skill level 4) and are broadly employed as legislators, senior officials, managers, professionals, technicians and associate professionals. "Professionals"

[5] ILO, International Standard Classification of Occupations, 2012 (ISCO-8 Volumn1), Geneva, 2012.

are understood to increase the existing stock of knowledge; apply scientific or artistic concepts and theories; teach about the foregoing in a systematic manner; or engage in any combination of these activities. (ISCO, Introduction to occupational classifications, ILO Bureau of Labour Statistics)

Typically involve the performance of complex technical and practical tasks that require an extensive body of factual, technical and procedural knowledge in a specialized field. Examples of specific tasks performed include: ensuring compliance with health, safety and related regulations; preparing detailed estimates of quantities and costs of materials and labour required for specific projects; coordinating, supervising, controlling and scheduling the activities of other workers; and performing technical functions in support of professionals.[6]

Domestic work & Domestic worker

Domestic work means work performed in or for a household or household. A domestic worker is any person engaged in domestic work within an employment relationship. A person is not a domestic worker if he/she performs domestic work only occasionally or sporadically and not on an occupational basis.[7]

Soft skills

Soft skills are important for success in employment and life. Other terms used for soft skills include key competencies, essential skills, transferable competencies, employability skills or core skills. Soft skills are built through basic education, such as reading and writing, acquiring the technical skills needed to perform specific duties, and professional/personal attributes such as honesty, reliability, punctuality, attendance and loyalty. Soft skills are categorized under four broad headings: learning to learn, communication, teamwork and problem-solving.[8]

Recruitment agents/labour recruiter

Refers to both public employment services and to private employment agencies and all other intermediaries or subagents that offer labour recruitment and placement services. Labour recruiters can take many forms, whether for-profit or non-profit or operating within or outside legal and regulatory frameworks.[9]

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[6] ILO, International Standard Classification of Occupations, 2012 (ISCO-8 Volumn1), Geneva, 2012.

[7] ILO, Convention on Decent Work for Domestic Workers, 2011 (No. 189), International Labour Conference, Geneva, 2011, Article 1(a).

[8] ILO, Regional Model Competency Standards: Core competencies, 2015.

[9] ILO, General principles and operational guidelines for fair recruitment and Definition of recruitment fees and related costs, 2019.

I. INTRODUCTION

1.1 Ethiopia's Labour market

Ethiopia is the second most populous country in sub-Saharan Africa and has shown consistently high economic growth (Admingov 2019). Between 2005 and 2011, for example, Ethiopia boasted one of the fastest-growing economies in the world, averaging around 11 per cent growth per annum. Ethiopia's economy has since remained strong, exhibiting broad-based growth averaging 9.9 per cent a year from 2007/08 to 2017/18, compared to a regional average of 5.4 per cent. Ethiopia's real gross domestic product (GDP) growth decelerated to 7.7 per cent in 2017/18 (World Bank 2020).

Despite a strengthened economy and optimistic view that the country can be considered a model for other states in sub-Saharan Africa, Ethiopia's labour market has not demonstrated a similar expansion in terms of job creation.

After a Military Regime, Ethiopia is encouraging a shift from a largely agrarian to an industrial economy in what is phase two of the Growth and Transformation Plans (GTP II 2015–2020). The overarching objective of the GTP is to focus on the development of light manufacturing to turn the country into a middle-income country by 2025. It is important to note, however, that 73 per cent of the population is still engaged in subsistence agriculture; as such, agricultural transformation and preparedness for sustainable urbanization with rural-urban migration remains a critical challenge of the development process (UNDP 2020). More recently, the Ethiopian Government launched its 10-Year Perspective Plan (July 2020–2030), with the aim of following a bottom-up approach to economic development, and with the full participation of stakeholders, including civic associations and development partners. The 10-Year Plan will replace the GTP, focusing on industries such as mining, tourism, urban development and innovation and technology (Ethiopian Monitor 2020). In pursuing state-led industrialization, the Ethiopian Government is modelling its economic development on countries such as South Korea, Taiwan and China.

1.1.1 Growth sectors in Ethiopia

In spite of the aforementioned challenges on the path towards improved livelihoods and economic stability in Ethiopia, a number of important sectors are growing. Key growth sectors include manufacturing, comprised of textile, footwear and garment industries; agricultural production and exports (including forestry and fishing, agriculture comprises 34 per cent of the country's GDP) (World Bank Data 2020); and construction (specifically

as a result of foreign direct investment (FDI) that has supported infrastructure projects). The service industry is also showing promise, with tourism, information communications technology (ICT), and the creative arts highlighted during key informant interviews as sectors with the potential for future growth.

Manufacturing: As of 2019, Ethiopia's manufacturing output comprised 5.6 per cent of the country's GDP (Macrotrends 2020). Projects harnessing FDI are under way throughout the country. These include the construction target of 40 industrial parks (IPs) and Special Economic Zones that require local low- and medium-skilled labour. The People Republic of China (PRC) Government has encouraged some Chinese companies to move manufacturing to Africa, but the impact has not been as expected (Francoise 2017). In Ethiopia, Chinese investment has not yet been transformative due to reported difficulties of skills transfer, as local labour forces have been concentrated in low-skilled jobs. There is great potential in this sector, and a growing number of young Ethiopians are finding employment in light industry, but garment and footwear production still only accounts for a minor share of the country's exports.

Construction: Recently, as the share of the agricultural sector has declined, the share of industry has increased. Specifically, the contribution of the industrial sector rose from 9 per cent during the Government's Plan for Accelerated and Sustained Development to End Poverty (PASDEP) to 25.4 per cent over the period of the GTP, and a significant component of the rise in the share of the industry sector in GDP growth was accounted for by the construction subsector (UNDP 2020). A number of high-profile projects are under way throughout Ethiopia, largely supported by Chinese FDI. These forms of foreign investment will potentially playing an important role in skills transfer and building physical infrastructure. In particular, new developments in the form of government-led IPs and new industrial projects that are in line with the country's development goals show promise in terms of taking advantage of Chinese skills and technology and Ethiopia's large labour pool (Francoise 2017).

Agriculture and agro-processing: Focused on the growth and export of products such as coffee, tea and vegetables, the agriculture sector is the country's biggest employer, accounting for around 80 per cent of the total employed population (National Labour Force Survey 2013). Livestock is a significant growth industry: Ethiopia has a national herd of some 57 million cattle, contributing about 80 per cent of the country's overall livestock value, while improved livestock breeding also means that the demand for chickens is growing (UNFAO 2019). The Government recently increased targets for meat production to 164 tonnes and egg production to 3.9 billion by 2020 (EIC 2020). Opportunities exist in the processing of agricultural products including meat, fish, fruit and vegetable, edible oil, seeds and cereals (EIC 2020).

1.1.2 Labour migration out of Ethiopia

Ethiopia is a major migrant-sending country to the Middle East, in particular to Saudi Arabia, Kuwait and the UAE (ILO 2018). The mode of migration – documented or irregular – and the kind of employment most commonly found has been segmented along gendered lines; men are often migrating irregularly for work in the construction industry, women migrating through official channels/regularly and gaining employment as domestic workers: gardening, cleaning, cooking and childcare (Schewel 2018).

Workers who migrate using formal or "regular" visa status are more likely to receive training (mostly non-formal or language training) while overseas and are more likely to remit money back to Ethiopia. They are also more likely to return to Ethiopia voluntarily. In contrast, migrant workers employed on an irregular basis – for example, those entering the Middle East through transit countries – face significant risks of exploitation associated with forced labour outcomes (ILO 2018).

Although it is difficult to track exact numbers of migrant workers travelling and working as "irregular", Ethiopia's Ministry of Labour and Social Affairs estimated that they represent between 60 and 70 per cent of all Ethiopians in the GCC states (ILO 2018). Results from a recent ILO baseline survey are consistent with Government estimates, with 63 per cent of returned migrant workers reporting they used smugglers or other informal channels when they migrated to the Middle East. Some 83 per cent of all returned migrants did not have a passport, visa and work permit so could be considered as in an irregular status (ILO 2018).

The majority of returnee migrant workers (82 per cent) have remitted money back home (figure 1). Most of them (81 per cent) used the hawala system or a bank. Most of the respondents remitted money two to four times a year. On average, remitting migrants sent a total of 25,000 Ethiopian birr annually. However, a significantly larger proportion of migrants who used regular migration channels (around 92 per cent) remitted money than those who used irregular channels (at 76 per cent); these regular migrants also sent home a larger amount on average (26,400 birr compared to 24,000 birr) (ILO 2018). Hence, promoting regular migration has economic benefits with the potential for substantial increases in remittances, which, according to the World Bank, represented 0.55 per cent of the country's GDP in 2019 (World Bank data). Migrant-sending communities also benefit from the exchange of social (skills and ideas) and economic (cash) remittances sent home.

While many Ethiopians have chosen to migrate for work to the Gulf and Lebanon, there are potentially other countries beyond GCC states where medium-skilled and highly-skilled Ethiopian migrants could seek job opportunities. In Asia and Europe for example, a preliminary exploration was done as part of this study by conducting an extended desk review on opportunities in the Republic of Korea (South Korea) and in the Czech Republic (see Annex 1).

The desk review found that South Korea employs a growing foreign workforce. Migrant workers in South Korea are mainly from Asian countries with which the South Korean Government has established a memorandum of understanding (MoU) as part of the Employment Permit System (EPS) (Hur et al. 2013). Having said this, economic growth and wage increases in South Korea have created manpower shortages for low-skilled jobs needed by small and medium-sized enterprises (SMEs) (Denney, 2015). With a young, increasingly skilled workforce, there are opportunities for Ethiopian workers to find work in South Korea, particularly in the construction and manufacturing sectors. As a precursor to this process, the Government of Ethiopia should be encouraged to enter into discussions with the Government of South Korea with a mid- to long-term view of establishing a similar MoU.

Like many advanced economies, the Czech Republic is facing an ageing crisis and associated demographic decline. Furthermore, as more Czech women have achieved higher levels of skills training and education, subsequently entering the workforce, there are both shortages in low-skilled labour positions and in the domestic work sector. While the Czech Republic could provide possibilities for Ethiopian men and women migrant workers, strong anti-immigrant sentiments in the country require a cautious approach before any attempts are made to negotiate a bilateral labour migration agreement between the two countries.

1.2 GULF labour market trends

1.1.2 Growth sectors in KSA, Kuwait and UAE

The Gulf oil boom of the 1970s created an increase in the demand for low-, medium- and highly-skilled labour that outstripped domestic supply. The GCC countries adopted proactive policies to recruit and employ foreign workers and, by 1985, foreign workers numbered 4.4 million in the region. This figure increased to 5.2 million by the mid-1990s and 7.1 million by 2000 (Khoja et al. 2017). As of 2019, according to the Population Division of the United Nations Department of Economic Affairs (UNDESA), there were 35 million international migrants in the GCC countries (ILO 2019). A dependence on migrant workers in the region and a high rate of unemployment among Gulf nationals has since compelled GCC states to enact a range of nationalistic policies to create and protect employment for GCC citizens.

Fifty years after the initial boom, the oil and gas sector continues to dominate the economic activity of GCC states. Recognizing that these resources are limited, governments in the region are looking to diversify their economies and shift away from being “rentier states” reliant on natural resources to a knowledge economy. Future-proofing GCC economies means both investment in technologies of the fourth industrial revolution (especially the automation of labour), developing Artificial intelligence (AI) solutions, and building capacity in the domestic labour force.

The ILO estimated that in 2017 the Arab States hosted 9 million (39 per cent) women migrant workers. The majority of these workers are from Asia, with a sizeable number also coming from Africa, especially Egypt, and increasingly from east Africa (Ethiopia, Kenya, Uganda) (ILO 2019).

Shifting market trends in GCC states will impact throughout the ME, particularly for labour-sending countries. Given these economic changes, it is important to know what sectors are currently growing, which are the largest employers of migrant workers in the region, and which sectors are most likely to be affected by the reshaping of work in a post-rentier GCC.

Construction: The automation of labour-intensive work will accelerate in the coming two decades, generating an estimated US$366.6 billion while impacting on the labour force, particularly on workers with a high school education or less who are vulnerable to losing employment to automation (aus dem Moore et al. 2018). Nevertheless, the construction sector is and will continue to be the primary employer of migrant labour. Continued reliance on low- and medium-skilled, mainly male labour is driven by mega-infrastructure projects, such as the 2022 World Cup in Qatar and Saudi Arabia's King Salman Energy Park (SPARK).

Healthcare: The healthcare industry is expected to come under pressure as more GCC citizens suffer from age-related non-communicable diseases (NCD) and require professional support (Mehio Sibai et al. 2017). The GCC healthcare industry has been dominated by foreign labour, in particular Filipino nurses and Western doctors. Driven by increasing demand, GCC countries are likely to look further abroad to find the labour required to fill the existing labour and skills gap. The healthcare sector is unlikely to feel the effects of automation as it impacts on construction and manufacturing.

Domestic and care work: Domestic and care work is the highest employer of women migrant workers and looks to continue this growth into the future (Atong et al. 2018). As more Gulf women enter the workforce, and as the needs of an ageing population outstrip current levels of care worker's employment, the domestic work sector is likely to grow. Domestic work services are likely to favour the employment of women migrant workers, although there may also be opportunities to employ men in certain subsectors of the care economy such as specialized geriatric care.

Service sector/hospitality: The hospitality sector is booming in GCC states as the region invests heavily in high-profile international events and developing the tourist industry. Hospitality and construction employ the largest number of foreign workers in Dubai. In 2017, the construction sector employed 27.6 per cent of all workers or 598,773 people, and the hospitality sector employed 108,473 people, of which less than 1 per cent were Emirati nationals (GLMM 2019). Investment in hotels and related infrastructure will drive the need for labour and migrant workers are emerging as the backbone of hospitality, particularly in low-skilled jobs such as drivers, cleaners, porters and kitchen staff (Björnsson 2019). The hospitality sector is also now under pressure from nationalistic policies. Saudi Arabia, for

example, plans to restrict certain hospitality jobs to its own citizens, banning the recruitment of foreign migrant workers to some positions. The decision will apply to positions ranging from front-desk jobs to management. Exceptions include drivers, doormen and porters (Bloomberg 2019). Within the service sector, low-skilled jobs such as gas station attendant and cleaners are also largely staffed by foreigners.

Agriculture and fishing: Agriculture and fishing sector in GCC states is dominated by foreign labour. According to FAO, 8,490 of the 11,680 fishermen in Saudi Arabia are migrants (FAO 2019). In the fishing sector, the majority of the labour is male and from the southern coast of India (Migrant Rights 2019). Migrant fishermens often work irregularly on boats operated by GCC owners and are highly vulnerable to exploitation. Similarly, agriculture is also overwhelmingly dominated by male, foreign low-skilled labour (Baldwin-Edwards 2019). The agriculture and fishing sector is another example of foreign, low-skilled labour filling positions that natives are not inclined to work in (ILO 2017).

1.1.2 Migrant workers in the Gulf

The economic impact of migrant workers in the Gulf States is felt in particular labour sectors, such as construction, agriculture, manufacturing and care work. The UAE, Saudi Arabia and the four other states that comprise the GCC – Kuwait, Qatar, Bahrain, and Oman – have been the destination for both low- and highly-skilled and labour since the 1970s (Rahman 2010).

Within the Gulf States, the push and pull factors compelling people to migrate in search of better lives are changing as the region moves away from a reliance on the oil sector. GCC countries, for example, are investing heavily in new technologies as a way to reduce labour costs and building the capacity of their citizens to engage in the knowledge economy in an effort to tackle a regional skills gap (YouGov 2016).

In proportion to country size, India was reported as filling some 20 per cent of GCC jobs available to migrant workers; Egyptian migrant workers filled some 14 per cent; and Bangladeshi workers filled around 14 per cent. Ethiopia's share of jobs in GCC states has been comparatively low, accounting for around 2 per cent of positions. Ethiopia's comparatively low stake indicates that there is likely room to capture a larger portion of the job market.

Both male and female Ethiopians migrate to the Middle East and other countries. According to a recent ILO report on migration and forced labour, the proportion of female migrants to the Middle East (54.2 per cent) was higher than male migrants (45.8 per cent) and the majority of migrants comes from rural areas. The average age at departure was about 24 years, and 67 per cent of migrants are Muslim. The occupation while abroad varied by sex, with herding and slaughtering of camels and goats, construction and waste disposal the main activities for male migrants, while female migrants were mainly employed as domestic workers (ILO 2017b).

GCC states will continue to require migrant workers at least over the next ten years, with demand strongest in the construction, domestic and other care work, hospitality and agricultural sectors. An ageing population, low fertility rates and more GCC women entering the workforce mean that more migrant domestic workers will be required, and the meaning of care work will shift from housekeeping to in-home paid care (Tayah and Assaf 2018). This shift will require more specialized training, as the focus of domestic work will move to work with children, the elderly and the disabled (Mehio Sibai et al. 2017).

At the same time, GCC governments have been investing heavily in the digitization of labour (aus dem Moore et al. 2018). Outside of care work, the automation of manufacturing and associated AI development will impact negatively on low-skilled labour in fields such as manufacturing, but mega-projects like the building of the UAE Expo 2020 and Qatar's Football World Cup 2022 facilities and continued reliance on labour-intensive practices means the demand for low- and medium-skilled workers is likely to continue (ILO 2017).

First steps to facilitate the employment of Ethiopian migrant workers in GCC states would include negotiating and signing bilateral labour agreements or MoU including protection provisions to make sure that Ethiopian migrant workers' employment conditions (working time, wages, occupational safety and health) and living conditions are in accordance with international labour standards on the protection of migrant workers. The UAE and Ethiopia have already signed an MoU which has the objective of strengthening cooperation in the field of employment of manpower between parties (see ME Countries' Legal Framework). According to the terms of the MoU, the UAE is obliged to ensure the recruitment, hiring and placement of workers from Ethiopia is done in accordance with UAE laws and the provisions throughout the MoU. Article 8.3 of the MoU between Ethiopia and the UAE, for instance, states that the UAE has a responsibility to "Ensure that the welfare and rights of workers employed in the UAE are promoted and protected, and that Ethiopian workers enjoy no lesser rights, privileges, protection than foreign workers engaged in the same employment activities in the UAE." In other words, the MoU is designed to promote working and living conditions for Ethiopian migrant workers.

The Kingdom of Saudi Arabia has signed an Agreement on the Employment of Domestic Workers with Ethiopia. This Agreement aims to protect the rights of both domestic workers and employers and to regulate the contractual relations between them. According to the terms of the Agreement, KSA will ensure the placement, recruitment and hiring of domestic workers, will protect and promote the welfare and rights of domestic workers and ensure the implementation of an employment contract. Ethiopia is expected (among other things) to ensure the recruitment of medically qualified, appropriately skilled workers that meet the agreed criteria and to ensure that domestic workers do not have a criminal record.

Kuwait and Ethiopia are currently in discussions with regard to a MoU. Within this agreement, Kuwait set particular conditions for hiring Ethiopian domestic workers from Ethiopia, including efficiency, previous training and proficiency in spoken English.

1.3 Background

Ethiopia is the fastest-growing economy in the region and the fifth fastest-growing economy among 188 International Monetary Fund member countries. Still, it remains one of the poorest countries in the world, with a per capita income of $850 (World Bank 2019). Rapid changes and economic instability have led to a number of challenges. Many Ethiopians want to escape from poverty and hardship to improve their living conditions and those of their families. Consequently, unemployment and underemployment have created a growing flow of Ethiopians migrating abroad. A study carried out by the ILO in 2017 found that the Ethiopian Government's migration ban on low-skilled workers to Sudan and the Middle East did not help to safeguard migrant workers. Instead, it led to irregular migration, which in turn puts migrants at significant risk of trafficking and employer abuse (ILO 2017). The ban was subsequently lifted in early 2018.

While this is a positive development, bilateral agreements with GCC states do not always include the necessary protection provisions. Many migrants still face hardship in the form of low-paying jobs, and many of these migrants find themselves unemployed on their return to Ethiopia. One of the key determinants for ensuring both workers and employers benefit from migration is skills development. Having access to decent work and skills development not only reduces the chances of labour abuse, but also increases opportunities for migrants to find higher quality employment and engage in upward socio-economic mobility, both in Ethiopia and overseas. It is widely known that most Ethiopian women migrant workers travel to the Middle East to seek employment in domestic work, while men migrants seek employment in other sectors such as construction and agriculture. This LMA has the objective of better understanding the occupations and skills in demand in Ethiopia and major labour-receiving countries.

II. RESEARCH APPROACH

2.1 Research objectives

The overall objective of the ILO project on improved labour migration governance to protect migrant workers and combat irregular migration was to address the decent work deficits and improve labour migration governance in Ethiopia. This LMA represents a key initiative to determine the skills profiles, gaps and surpluses, and how skills development initiatives can be framed and improved to better meet labour market demand and economic opportunity in Ethiopia and key destination countries. Its specific objectives can be summarized as follows:

1. Provide a detailed analysis of occupations and skills in demand in Ethiopia and major labour-receiving countries in the Middle East with a breakdown by major sectors and countries, and compare it with currently available and upcoming workers' skills profiles in Ethiopia, with a specific emphasis on the profile of current and potential Ethiopian emigrants. Identify skills gaps and surpluses locally, with a view to making policy recommendations to avoid migration-induced skills shortages. Generate key employment data including current employment (by occupation, sector, skills/educational level); vacancies; vacancies that are hard to fill; projected hires; perceptions on skills that are hard to find; job security and social protection.
2. Examine evolving labour-market dynamics and provide projections of the demand for low-, medium-skilled and skilled migrant workers in selected major labour-receiving countries by sector and qualification level, taking into consideration changes in priority sectors, in the destination countries for the 2020–2030 period.
3. Consolidate the above strands of information to draw key conclusions on the employment potential in Ethiopia and destination countries, differentiating sectors (economic activities), educational and skills levels, and gender.
4. Assess the practices and adequacy of existing labour market policies and institutions (training and employment services, labour regulations, labour migration regulations and so forth) in Ethiopia and destination countries in light of the findings, and identify how Ethiopia can improve its responses to these needs. The assessment will also review the extent of gender-specific responses in training and the possible needs for diversification of male and female workers' skills and occupations. Assess the institutional framework for migration management in selected destination countries, including labour market integration, social welfare and skills recognition.

5. Based on the assessments, develop a roadmap indicating which policies, strategies and interventions need to be developed or strengthened in Ethiopia in order to facilitate and improve support for low-, medium- and highly-skilled male and female potential migrant workers and recommend possible countries and sectors for men and women Ethiopian labour migrants.

2.2 Research scope

The study examined employment trends and employer needs in Ethiopia and three destination countries: Saudi Arabia (KSA), Kuwait and the UAE. In the Gulf, employers of migrant workers were interviewed in capital cities. In Ethiopia, employers in key growth sectors were interviewed in Addis Ababa City Administration and Amhara, Oromia and Tigray Regional States. A number of key stakeholders were also interviewed, such as key ministries and recruitment agents. Key stakeholder interviews were carried out in Ethiopia to look at the in-country situations with respect to employment and working conditions, as well as the support services available to migrant workers.

An extended desk review was also conducted to explore market and job trends in South Korea and the Czech Republic. However, since no primary data was collected as part of this undertaking, results have been included as Annex 1.

Survey topics examined both demand and supply factors across key sectors that employ large pools of low- to high-skilled labour. Topics included worker composition in terms of skills levels, employment of migrant workers, future demand for different skill levels and specific jobs, the expected supply of different skill levels and jobs, the recruitment process and selected work conditions and entitlements provided.

2.3 Research design

The LMA employed a mixed-methods approach, beginning with a desk review before the qualitative and quantitative data collection (figure 1). The qualitative component allowed for deeper insights from relevant stakeholders regarding labour market trends and future employer needs. The quantitative part focused on employers in key growth sectors in Ethiopia and the Gulf to gain insights into the demand and supply of skills levels and specific jobs relevant to the sectors. The assessment was supported by a validation workshop to obtain input on recommendations, which was held online due to the pandemic situation.

Figure 1. Data collection sequence

2.4 Data collection methods

Based on the initial desk review and internal consultations with ILO staff, the following four target groups were determined, for which interview guides and survey questionnaires were developed (Annex III): (i) employers in Ethiopia; (ii) employers in the Gulf; (iii) regional stakeholders including rural job-creators, trainers and employers; (iv) informants, including ministry representatives, the Job Creation Commission, employer organizations and recruitment agencies. A full analysis was conducted for each of the four target groups through triangulation.

2.4.1 Desk review

The initial desk review was carried out to map the employment situation and trends in Ethiopia and the selected countries in the Gulf. It also provided important information for the methodology, and in particular for identifying key sectors and occupations that are expected to grow and attract migrant workers in the near future. While a previous baseline study provided good insights into the situation of potential and returned migrants in Ethiopia, the needs of employers in Ethiopia and the Gulf had not been assessed, and it was important to learn as much as possible about them in order to prepare valid survey tools.

The extended desk review to explore market and job trends in South Korea and the Czech Republic was done at a later stage in the assessment. This extended desk review was included to go beyond the Gulf and start building insights around potential migration destinations in Asia and Europe.

2.4.2 Stakeholder interviews

Interviews with senior Federal and regional stakeholders were conducted face-to-face in Addis Ababa. The moderator guides used have been included as Annex IV. Due to the COVID-19 virus, which started to spread in Ethiopia soon after the fieldwork had commenced, some of the semi-structured interviews were conducted by telephone. Interviews were conducted in Amharic and English by the research team (Table 1).

Table 1. Number of informants interviewed

Informants	*Location*	*No.*	*Method*
MOLSA • Director-General of the Ministry of Labour and Social Affairs (MoLSA)	Addis Ababa	1	Phone
TVET • Director of TVET, Tigray Region • Director of TVET, Finote Selam town, Amhara Region	Amhara, Tigray	2	Face-to-face, phone
Ministry of Education (MoE) • Senior Adviser, Ministry of Education, Science and Higher Education	Addis Ababa	1	Phone
Jobs Creation Commission • Senior Manager, Innovative Jobs and Projects	Addis Ababa	1	Phone
Urban Job Creation and Food Security • Job Creation Directorate • Bole Sub-city Mini and small Job Creation Secretariat Officer	Addis Ababa	2	Face-to-face, phone
Employers' federation/workers' organization • President of the Ethiopian Industry Employers' Federation and Vice-President of the Intergovernmental Authority on Development (IGAD) Employers' Confederation • President of Private Overseas Employment Agencies Federation and Secretary of the Employers' Federation	Addis Ababa	2	Phone
Recruitment agencies • President of the Ethiopian Private Employment Agency Federation • Overseas Employment Matchmaking at Nathan Foreign Employment Agency PLC • Manager at Hammer Private Recruitment Agency • Matchmaker at Mubarek Mohamed Foreign Employment Agency PLC	Addis Ababa	4	Face-to-face, phone
Rural Job Creation and Food Security • Mini and Small Business Job Creation Secretariat, Finote Selam town, Amhara Region • Mini and Small Business Job Creation Secretariat, Mekele town, Tigray Region • Urban Job Creation and Food Security Official, Tigray Region	Amhara, Tigray	3	Phone
Employers • General Manager at Ethiopian Business Trade Corporation • Public Relations at Mulege PLC	Addis Ababa	2	Phone
Trainers • Women and Youth Affairs Official, Finote Selam town, Amhara Region • Labour and Social Affairs Official Expert, Beshoftu town, Oromia Region • Team Leader at the Education Office Secretariat, Beshoftu town • Oromia Education Sector Division, Beshoftu Town Urban Education Programme	Amhara, Oromia	4	Face-to-face, phone
Total		**22**	

2.4.3 Survey with employers in Ethiopia

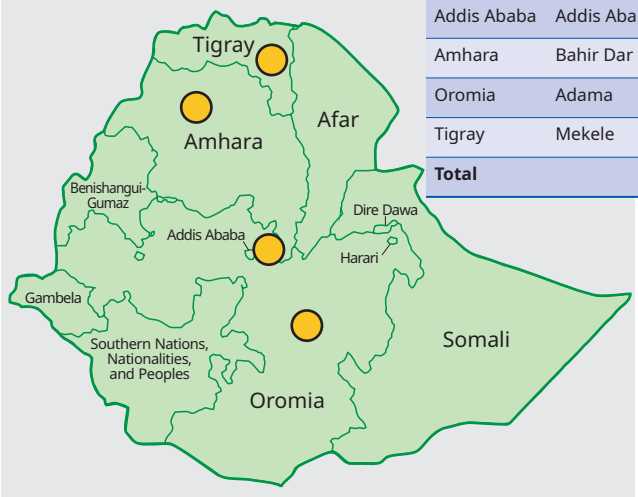
The desk review found that the sectors with the most prominent growth potential in Ethiopia include construction, manufacturing and agriculture; the survey with employers, therefore, focused on these growth sectors. These three sectors employ large numbers of low-, medium- and highly-skilled workers. Employers were targeted in the capital city of three states: Amhara, Oromia and Tigray. Each location was identified to be a key growth area for the three sectors. The sampling method, target areas and sample size by location are shown in table 2 below.

Table 2. Sampling methodology for Ethiopia

Methodology	*Firms*
Data collection method	Face-to-face interviewing
Coverage	Major cities: Addis Ababa, Bahir Dar, Adama, Mekele
Sectors	Construction, agriculture and manufacturing
Sampling method	Intercept and quota sampling
Target respondent	The owner or line manager
Total number of employers interviews	**n=157**

The sampling method used was purposive rather than representative. The aim was to interview around 50 employers from each sector and to have a spread across the four locations with companies of different sizes. The geographical distribution of the sample across the four locations is shown in figure 2 below.

Figure 2. Survey locations and sample size in Ethiopia



Region	*City*	*Construction (n)*	*Agriculture (n)*	*Manufacturing (n)*
Addis Ababa	Addis Ababa	20	26	18
Amhara	Bahir Dar	12	8	13
Oromia	Adama	10	10	10
Tigray	Mekele	10	10	10
Total		**52**	**54**	**51**

In order to have comparable results to the Gulf, the data collection tools used for Ethiopia and the Gulf countries were similar, apart from the different sectors included. Hence, sector-specific questions were incorporated into the overall questionnaire structure.

2.4.4 Survey with employers in the Gulf

Based on the desk review, the sectors that appeared to have the most potential for future employment included construction and care work. Other sectors such as transportation, services, tourism and retail also have potential and were included as an "other" category. In KSA, the Government will restrict job opportunities in services for foreigners as they want to prioritize the native population for these jobs. Employers were surveyed in three countries; namely, Saudi Arabia, Kuwait and UAE. It is important to note that Ethiopian migrants make up a relatively small proportion of migrants in the Gulf. Hence, employers of low-, medium- and highly-skilled migrant workers were targeted. This provided for a more representative sample of the selected sectors and gives a more realistic picture of employer needs, regardless of the workers' country of origin.

Employers can be divided into two separate groups, as shown in table 3 below. These include private employers who employ migrant care workers, and firms. Because these two groups are fundamentally different, different methodologies were applied to each, as shown below.

Table 3. Sampling methodology for the Middle East

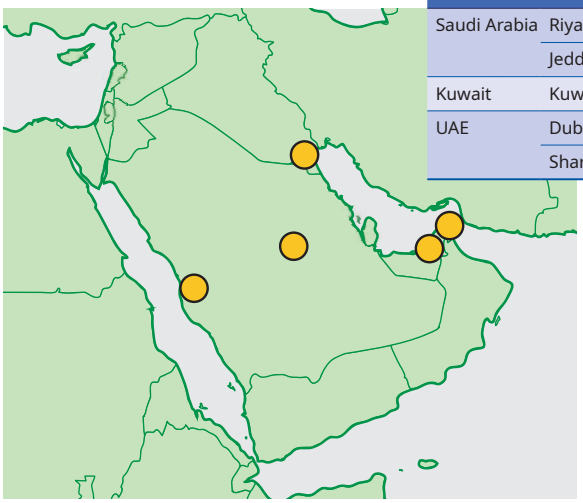
Methodology	*Private employers*	*Firms*
Data collection method	Face-to-face interviewing	Face-to-face interviewing
Coverage	Major cities: Jeddah and Riyadh; Kuwait City; Dubai and Sharjah	Major cities: Jeddah and Riyadh; Kuwait City; Dubai and Abu Dhabi
Sector	Care workers	Construction, agriculture, other employers[10]
Sampling method	Intercept and quota sampling	Intercept and quota sampling
Target respondent	Main household decision maker	Owner or line manager
Total number of interviews	n=40 per country (n=120 in total)	n=80 per country (n=240 in total)
Migrant worker criteria	Any country of origin Employed care worker for 6 months or longer	Any country of origin Must employ low-, medium- or highly-skilled labour

Purposive sampling was also applied in the Gulf countries with the aim of covering a broader set of employers from different sectors and with an equal spread of the sample across major cities. The sample was allocated in equal proportions to each country, with one third of employers being private employers of care workers and the other two thirds being private firms. The geographical distribution of the sample across the three countries is shown in figure 3, below.

In order to have comparable results, data collection tools were standardized across employers and countries. However, sector-specific questions were incorporated into the overall questionnaire structure.

[10] The mixed category of employers included: agriculture, waste management, gardening, retail, transportation and tourism.

Figure 3. Survey locations and sample size in the Middle East



Region	*City*	*Total (n)*	*Construction (n)*	*Care workers (n)*	*Other (n)*
Saudi Arabia	Riyadh	**61**	20	21	20
	Jeddah	**61**	21	20	20
Kuwait	Kuwait City	**121**	40	42	39
UAE	Dubai	**68**	21	22	25
	Sharjah	**52**	20	18	14

2.5 Data collection and data management

Data collection was carried out between 5 April and 29 May in Ethiopia, and between 9 April and 6 May in the Gulf. All survey data captured in Ethiopia and the Gulf was recorded using computer-assisted personal interviewing (CAPI). To ensure consistency and greater control of how the questionnaire is scripted on the CAPI system, Rapid Asia uses Survey Solutions, a CAPI system developed by the World Bank Group. The subcontractor in each country was required to use the Survey Solutions App and perform data collection using computer tablets. Following each interview, the data was uploaded onto a secure cloud server. The prescribed data collection process ensures better data quality based on the following:

1. Full control over the online survey design and ability to take full advantage of the various design features Survey Solutions has to offer to eliminate systematic errors in the data.
2. During training, mistakes were corrected and each interviewer could simultaneously update the online questionnaire.
3. Complete data consistency as each interviewer is guided by the script programmed into the survey application.
4. During fieldwork, real-time data monitoring was carried out, and interviews identified as having inconsistencies were rejected and returned to the interviewer.
5. During the initial data collection phase, an interim data file was downloaded from the cloud server and analysed to ensure results were in line with expectations.

2.6 Data analysis

2.6.1 Desk review

Relevant documents were reviewed and analysed against the research objectives for the LMA along with findings from the research.

The extended desk review was analysed independently. Because the results were quite separate, with no direct link to the other components of this study, findings have been included as Annex 1.

2.6.2 Stakeholder interviews

For each interview conducted, responses provided by informants were summarized into an analysis template to categorize them against the research objectives. All interviews were recorded on an MP3 device, which allowed the Assessment Team to follow up and clarify important points captured. Key findings were determined by identifying the most frequent responses, together with suitable case studies and quotes. The key findings were then linked back to each research objective in preparation for triangulation.

2.6.3 Survey of employers

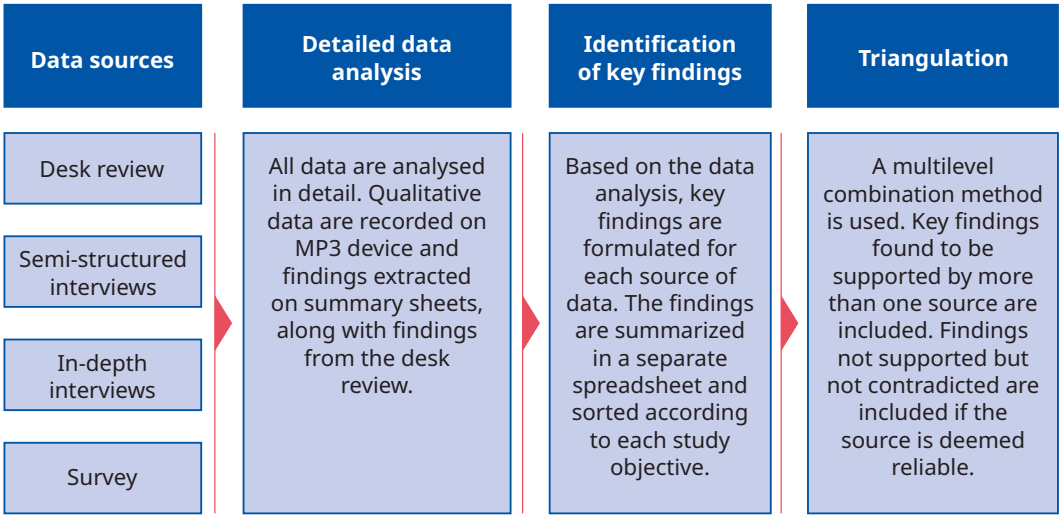
The quantitative data collected in Ethiopia and the Gulf were organized into two separate data files. The quantitative data were analysed using the Statistical Package for the Social Sciences (SPSS) software, and analysis was carried out across relevant subgroups.

To better understand employer needs, demand and supply factors were examined across key growth sectors. Demand and supply were first examined across different sectors and skills levels followed by a more detailed analysis across different sectors and specific jobs.

2.6.4 Data analysis and triangulation

The Assessment Team used the multilevel combinations approach to ensure proper triangulation of the data (USAID 2013). First, data from the desk review, informant interviews and the surveys were analysed separately, and key findings were agreed within the Assessment Team. Second, key findings were linked to the research objectives. Finally, triangulation was accomplished by examining the key findings across the different information sources (figure 4).

Figure 4. Data triangulation process



When reconciling the data and selecting the most important findings, the triangulation logic shown in table 4 was applied.

Table 4. Triangulation logic used throughout the analysis

Triangulation logic	
Findings supported by two or more data sources	• Prioritized and included
Findings not supported by other data sources but substantial	• Included if mentioned by a critical mass of respondents
Findings not consistent with other data sources or no critical mass	• Not included

2.6.5 Validation workshop

The results of the research were presented in a validation workshop held online on 8 December 2020. A number of participants from government agencies, social partners, private employment agencies, civil society organizations, employers and United Nations agencies attended the workshop to discuss the survey results and validate recommendations. The workshop also generated diverse feedback from participants on how the survey results can be used for future programme initiatives. Insights from the workshop have been incorporated into the recommendations in this report.

2.7 Quality assurance

The following quality-control requirements were enforced with the Survey Teams.

The English questionnaire and moderator guides were reviewed in detail by both the Assessment Team and ILO staff. Several rounds of revision were undertaken. Once the tools were agreed and had been signed off, they were sent to Ethiopia and the Gulf for localization, translation and pre-testing. Localization was done to ensure the questionnaire was in line with the country context as well as appropriate from a cultural perspective. Once the language, technical terms and other changes had been made, translations were carried out by experienced translators.

Prior to data collection, a Survey Team training course was conducted in each country, supervised by the Assessment Team. Participants included operations managers as well as all supervisors, moderators and interviewers. All interviewers were briefed and instructed on sampling procedures, with question-by-question training on the questionnaire and quality-control procedures. They also conducted role plays and pilot interviews to become familiarized with the questionnaire prior to fieldwork.

All interviews with stakeholders and key informants were recorded on an MP3 device for quality control purposes.[11] A standard template was also provided to the Survey Team in which to compile interview summaries.

Even though computer tablets were used, all completed interviews underwent several checks to ensure data quality:

- Validation of 20–30 per cent of all interviews for each interviewer. This was done through direct monitoring of fieldwork, confirming the interview location with the help of GPS stamps[12] and through call-backs to respondents to verify that an interview took place.
- The data file was checked for consistency in terms of quotas and regional sampling.
- The Assessment Team downloaded interim data files and ran several data tests to ensure that the data were clean, consistent and did not include outliers.

[11] This was to enable call-backs to participants to clarify answers if needed. The recording only started after consent was given, and personal details were not recorded. Recordings were not available to any third party and were deleted after six months for confidentiality purposes.

[12] The CAPI system used required interviewers to insert a GPS stamp at the end of the interview to verify the exact location.

2.8 Limitations and risks

When fieldwork started in early April, the COVID-19 outbreak had just begun in Ethiopia. Infections were relatively few, and it was deemed safe to start fieldwork as no restrictions had been announced by the Government. However, halfway through the fieldwork the Government introduced travel restrictions, and interviewers had difficulty travelling to different locations. This caused unforeseen delays, and fieldwork ended up taking nearly two months.

Phone and internet connections in Ethiopia were at times not available, and interviewers had difficulty in uploading completed interviews to the cloud server. At the end of each interview, the interviewers were instructed to insert a GPS stamp to record the exact location as part of quality-control procedures. Because of the internet connection problems, this was not always possible. However, a separate audit team did random spot checks with employers to ensure interviews had been carried out.

The Survey Solutions CAPI system could not display Amharic on computer tablets. This meant that only the English version of the questionnaire could be used. To overcome this problem, only English-speaking interviewers were used. They conducted the interview in the local language and could then record the answer in English on the computer tablets.

For the qualitative interviews, it was at times challenging to reach potential participants due to them working from home. Again, this was an unexpected result of the pandemic. This issue was overcome by replacing some interviews but required additional time and effort.

Even though COVID 19 measures was felt while collecting data, it was too early to feel its impact on the labour market. When this report was published, the COVID-19 pandemic has spread around the globe, and many countries have experienced a second wave. Employers in Ethiopia and the GULF may well have been affected by disrupted supply chains, having difficulty finding migrant workers due to prevailing travel restrictions, or business closing due to the pandemic. This study however, did not explicitly cover the pandemic's impact on employers because it had not yet taken a foothold in Ethiopia and the GULF countries when fieldwork was being carried out.

The extended desk review only covered two countries: South Korea and the Czech Republic. Hence, the findings are not necessarily reflective of potential opportunities in Asia and Europe. Because of this, it has been recommended to expand the review to include additional countries in both Asia and Europe.

III. FINDINGS

3.1 Ethiopia's labour market

3.1.1 Labour trends in Ethiopia

Ethiopia's labour market is currently undergoing transformation from being primarily agricultural-based to being a mixed agriculture-industrial economy. This is reflected in the changing demands of the labour market for medium- and highly-skilled workers. Ethiopia's economy is growing, but there remains a large domestic labour pool that is not being efficiently connected to employment. In other words, the country's labour market has the potential to absorb larger numbers of low- and medium-skilled labour, as well as an apparent growing demand for highly-skilled labour. Ethiopia also has infrastructural and land access challenges (as Ethiopia is a landlocked country and relies on Djibouti for port access) as well as a skills gap. Indeed, there are a number of factors contributing to and challenging Ethiopia's shift from an agrarian to an industrial economy. In particular, emerging trends in government and FDI in education, job generation and overseas employment provide clues as to current and future opportunities not only for Ethiopians who wish to stay home and work, but also those who choose to travel abroad.

As the Ethiopian economy grows, the country's labour market is also transforming, with increased investment in human capital. The findings of this research indicate a shift in the types of workers in demand for the emerging post-agrarian Ethiopian economy. Specifically, interviews with Ethiopian employers suggested a broad demand for low-, medium- and high-skilled workers, but increasing demand and attendant undersupply for medium- and high-skilled workers across the three sectors surveyed.

3.1.2 Employer profiles across key growth sectors

Across all three key growth sectors – construction, agriculture and manufacturing – the majority of enterprises surveyed were concentrated in Ethiopia's capital, Addis Ababa. 55 per cent of these enterprises are large companies employing over 100 people. An interviewee confirmed this bias by saying:

> *"Construction and manufacturing sectors are concentrated only in urban areas of the country. Currently, the chance for employment happens to be high only in urban areas of the country, but the unemployment rate also happens to be high in urban areas. The thing is most potential workers or job seekers are from urban areas, and most of them didn't want to work in rural areas of the country. They rather stay unemployed and wait for their family handouts. This is also why the unemployment rate in Ethiopia happen to be high"* (Job Creation Commission in Addis Ababa)

Some 98 per cent of enterprises surveyed in the construction sector are large enterprises (table 5). Similarly, 69 per cent of enterprises surveyed in the manufacturing sector are large enterprises. In contrast, in the agricultural sector, the majority of enterprises surveyed – some 54 per cent – employed between 50 and 99 workers. The sex distribution of employers interviewed across these sectors indicates that, while a majority of employers in construction (98 per cent) and manufacturing (92 per cent) are men, there is a notable shift in the gender distribution of agricultural employers, with 28 per cent of these comprised of women. Interviews with key informants including government representatives, trainers and employers agreed that further growth is expected in information and communication technology, accounting and e-cooperation services.

Table 5. Employer profile by sector in Ethiopia

City	Total n=157 (%)	Construction n=52 (%)	Agriculture n=54 (%)	Manufacturing n=51 (%)
Addis Ababa	41	39	48	35
Bahir Dar	21	23	15	26
Adama	19	19	19	20
Mek'ele	19	19	19	20
Sex of employer				
Male	87	98	72	92
Female	13	2	28	8
Business size				
Small: under 20 employees	1			2
Medium: 20-49 employees	8	4	19	2
Large: 50 employees or more	81	96	81	96
Position				
Business owner	32	19	57	18
Business manager	17	17	9	24
Senior manager	18	19	6	29
Supervisor	34	44	28	29
Seniority				
Years in this position	9	8	11	7

Most of the employers interviewed, 66 per cent, did not hire migrant workers. According to government policy in Ethiopia, foreign workers can only work in an area where there is no capacity to fill the position locally. Of the employers surveyed, some 34 per cent reported hiring some foreign migrant workers (figure 5). Migrant workers from across Africa, India and China were found to be distributed across the three key sectors.

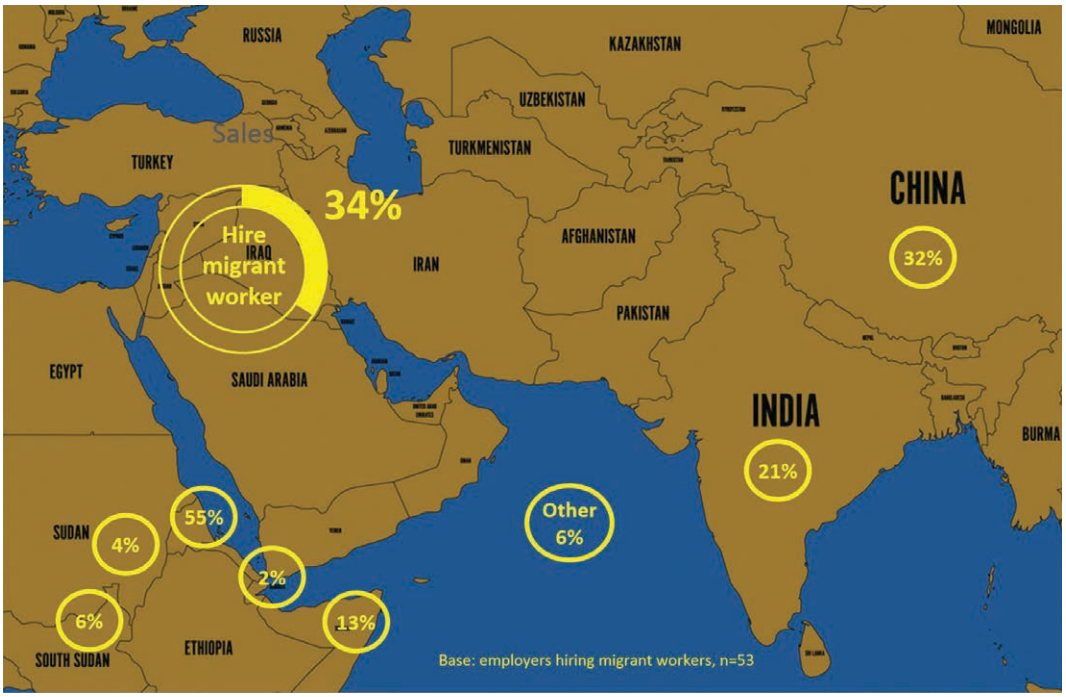
Interviewees stated that often in Ethiopia overseas workers are regarded better than local workers, as one TVET officer explained:

> *"I think we believe Ethiopians can't do better, but that's wrong. Most employers are willing to work with overseas workers than to hire Ethiopians even if they have the same level of education."* (TVET officer in Tigray region)

The perception that Ethiopian workers are inferior to foreign workers highlights an important problem – even if it is not based on fact – that some Ethiopian workers view themselves as inferior to foreign workers. The need, then, is to build educational and technical capacity, contributing to upskilling local workers.

Interviews with employers who hire migrant workers in Ethiopia (figure 5) shows that over half (55 per cent) of the employers hired workers from Eritrea, followed by 32 per cent employing workers from China, and 21 per cent from India.

Figure 5. Country of origin of migrant workers in Ethiopia



With regard to the demographics of the Ethiopian workforce, across the three key sectors surveyed – construction, agriculture and manufacturing – men comprise 58 per cent of the total workforce and women comprise the remaining 42 per cent. The construction sector employs the largest number of men (68 per cent) compared to women (32 per cent). Manufacturing shows some male dominance with 59 per cent men and 41 per cent women while women (59 per cent) outnumber men (41 per cent) in the agriculture sector.

3.2 Skill levels of workers

On the topic of workers' skill levels, interviewees were split on the question of satisfaction with the skills available in the job market. Specifically, employers expressed frustration with the limited skills available in the labour market, while suggesting a need for further improving both the quality of education available to potential recruits and the matching

of skills between the education sector and the job market. A consensus was voiced on the need for more investment into supporting TVET.

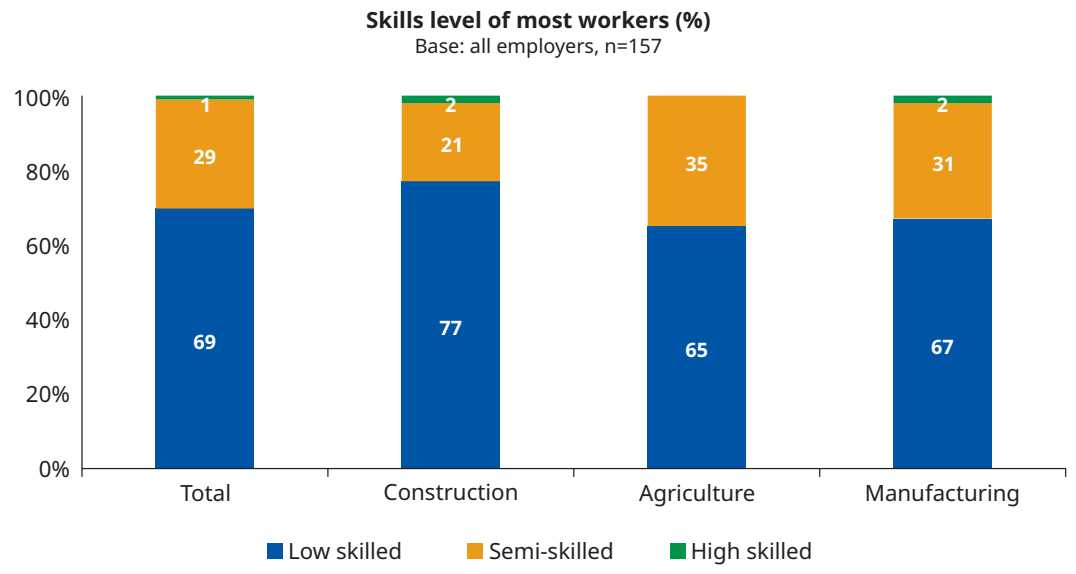
3.2.1 Supply and demand for skills in Ethiopia's labour market

While there was a demand for medium- and highly-skilled professionals in growth sectors like manufacturing and construction, this demand was concentrated mainly in urban centres of the country, such as Addis Ababa and Adama. However, there remains a demand for low-skilled workers in urban areas. When asked about the employment situation for low-, medium- and skilled labour, one Ethiopian respondent employed in education replied:

> *"Even if the payment isn't good for those kinds of work, the rate of growth in the construction sector can attract more job seekers from rural areas of the country. (...) but medium-skilled and high-skilled are a bit harder to get, especially people with the right skills"* (Ministry of Education)

Of 157 employers surveyed in Ethiopia, the skill level of current employees was stated to be concentrated in the levels of low-skilled and medium-skilled. While most employers hired some highly-skilled labour, the skill level of most workers in all three sectors was either low-skilled (69 per cent) or medium-skilled (29 per cent) and only 1 per cent had mainly high-skilled workers (figure 6). In construction, especially, the majority of employers (77 per cent) had mostly low-skilled workers, compared to 65 per cent for agriculture and 67 per cent for manufacturing.

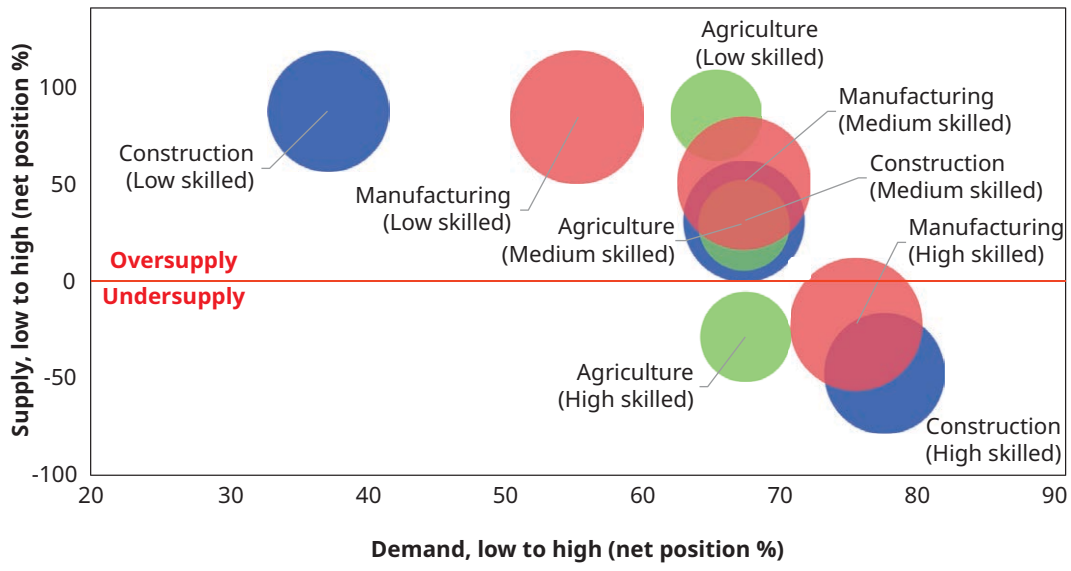
Figure 6. Skill level of most workers by sector



To better understand future demand for workers with different skill levels, employers were asked whether their needs for workers would increase or decrease in the next few years. Similarly, supply was measured by asking the employers whether it was easier or more difficult to find workers of different skill levels. The results are shown in figure 7 below and are broken down by sector. The net position for demand is shown on the horizontal axis and the net position of supply on the vertical axis.[13] A positive net position represents oversupply and demand, whereas a negative net position defines undersupply and demand. The size of the bubbles reflects the size of the sector based on the median number of employees of the employers interviewed.

In terms of labour force supply and demand, across all sectors there was a generally higher demand for highly-skilled workers, followed by medium-skilled workers; low-skilled workers had the lowest demand, especially in construction and manufacturing. In terms of supply, there was generally an oversupply of low- and medium-skilled workers across all three sectors. So while there currently may be a high concentration of low- and medium-skilled workers in these three sectors, employers are indicating more highly-skilled workers may be needed in the future. Key informant interviewees agreed that medium- and high-skilled employees are in high demand across all sectors; meanwhile, particularly in construction and manufacturing there was an increasing demand for high-skilled workers to fill existing gaps.

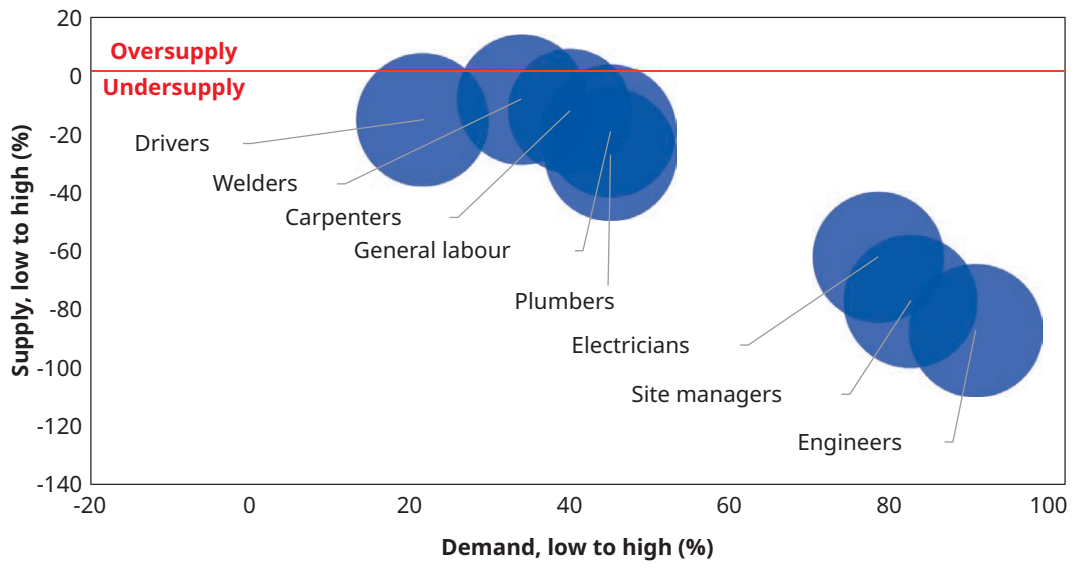
Figure 7. Labour force demand and supply by skill level in Ethiopia



[13] The net position is represented by the proportion of employers who said demand/supply will increase less those saying it would decrease. A positive net position suggests positive demand or oversupply.

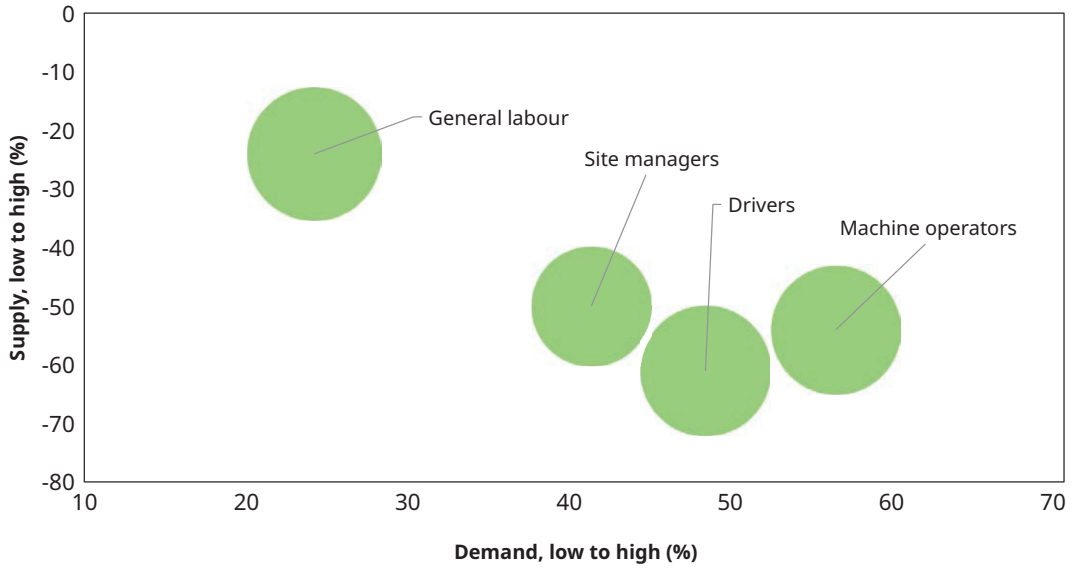
Focusing on the supply and demand for construction jobs in Ethiopia (figure 8, below), the greatest demand and undersupply was for highly-skilled positions such as engineers, site managers and electricians. In contrast, low- and medium-skilled positions like drivers, welders and carpenters were in comparatively less demand and with relatively higher supply. Although these low- and medium-skilled positions may be in less demand than high-skilled positions, employers' responses – as shown on the chart below – show that there is a still a demand for such workers and that the worker supply in this sector falls into the category of undersupply rather than oversupply. This suggests that there are not enough graduates in Ethiopia to fill these positions or that employers and potential applicants are not effectively matched. However, employers believe there are opportunities for employment in Ethiopia's construction sector.

Figure 8. Labour force demand and supply for construction jobs in Ethiopia



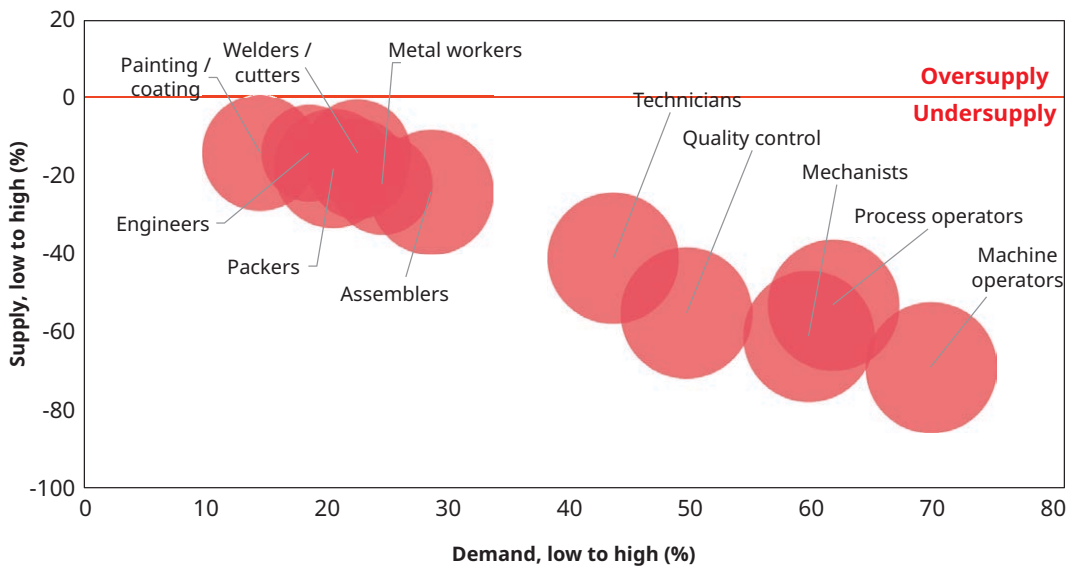
In regard to the supply and demand for agricultural jobs (figure 9, below), the greatest demand and undersupply was for medium- and highly-skilled positions, such as machine operators, drivers and site managers. While there appear to be fewer roles available compared to the construction sector, the supply for jobs such as drivers in agriculture is lower than in construction, meaning that there could be opportunities for workers trained as drivers in construction to fill undersupplied positions in agriculture. Overall, we can see that in agriculture there is also an undersupply for low-, medium- and highl-skilled positions. Based on this, employers indicate that there are opportunities across all skills levels of employment in Ethiopia's agriculture sector.

Figure 9. Labour force demand and supply for agricultural jobs in Ethiopia



Shifting the focus to the manufacturing sector (figure 10, below), employers similarly stated a broad undersupply of workers across the skill levels. The greatest demand and undersupply was for medium- and highly-skilled workers such as machine operators, process operators, mechanists, quality control and technicians. In contrast, low- and medium-skilled positions such as assemblers, packers, metal workers, welders/cutters and painters/coaters are in less demand and higher supply. Perhaps unexpectedly, employers said that engineers – a high-skilled technical position – are in far less demand and higher supply than other high-skilled jobs in this sector. Having said this, as with construction and agriculture, the employers interviewed agreed that there is an undersupply of all positions in Ethiopia's manufacturing sector.

Figure 10. Labour force demand and supply for manufacturing jobs in Ethiopia

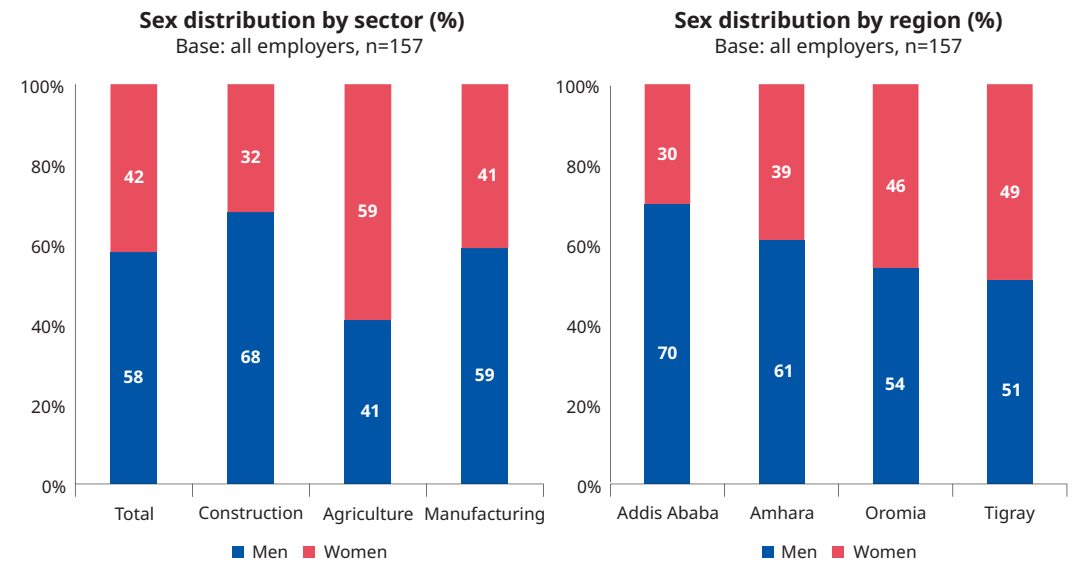


3.2.2 Opportunities for the sexes in Ethiopia's labour market

Employers across the three sectors of construction, agriculture and manufacturing agreed that there are skills gaps in the Ethiopian labour market and a broad undersupply of workers across sectors and skill levels. Disaggregating the data by sex provides further insights into areas where particular skill levels are required (figure 11, below). Findings from interviews with employers suggest that Ethiopian women should consider opportunities in Ethiopia as a first-tier option, as women are employable across the key sectors. Specifically, 58 per cent of the workforce of employers interviewed is comprised of men and 42 per cent women. In construction and manufacturing, we see that the majority of the workforce (68 and 59 per cent respectively) is comprised of men, while in agriculture the majority of the workforce is comprised of women (59 per cent).

These distributions of labour by sex repeat themselves across the regions surveyed. In Addis Ababa, for example, 70 per cent of the workforce in the enterprises surveyed is composed of men. In Amhara, 61 per cent of the workforce is composed of men; while in Oromia and Tigray, the sex distribution is closer to 50 per cent. It would benefit the national economy to encourage Ethiopian women to fill the skills gaps in the local labour market. Training in core skills would likely enhance the employability of Ethiopian women to enter the labour market in positions of high demand, both within the domestic labour market and overseas.

Figure 11. Workforce composition by sex in Ethiopia



3.3 Future of work in ethiopia

3.3.1 Shift to medium- and high-skilled work

The data collected and presented in this report suggest that the Ethiopian labour market is entering a shift in terms of the kind of workers required for the jobs available. Across all three key sectors – construction, agriculture and manufacturing – employers registered an undersupply of workers across skill levels (low, medium and high). More specifically, employers indicated that there is an increasing demand for medium- and high-skilled workers. An interviewee managing TVET training described a specific need for:

> *"Semi-skilled and high-skilled professionals with quantities as well as with quality that can meet employers' requirements."* (TVET Director in Amhara region)

The shift that is occurring in the Ethiopian labour market from a low-skilled workforce to a medium- and high-skilled workforce is representative of transformation from agriculture to industrialization. As this change continues to develop, there will be a growing demand for particular skills in employees. For example, in the construction sector, employers expressed a heightened need for high-skilled workers such as engineers and site managers, as well as workers with "core skills", such as the ability to listen and language skills. In agriculture, machine operators – a medium/high-skilled role – were in high demand, while low-skilled positions such as general labourers were comparatively less in-demand, but still undersupplied. In manufacturing, there was a high demand for medium- and high-skilled positions such as machinists, assemblers and technicians. The high demand for medium- and high-skilled workers across these three sectors was also confirmed by several stakeholders interviewed. One such interviewee, from the Job Creation Commission, said:

> *"For the future, we might not need lots of packers, and it's highly likely that future, even current technology can or will replace such jobs. Therefore, before it's too late, there is a need to train those packers to be machine operators so that they can operate the machine that is about to replace them"* (Job Creation Commission in Addis Ababa)

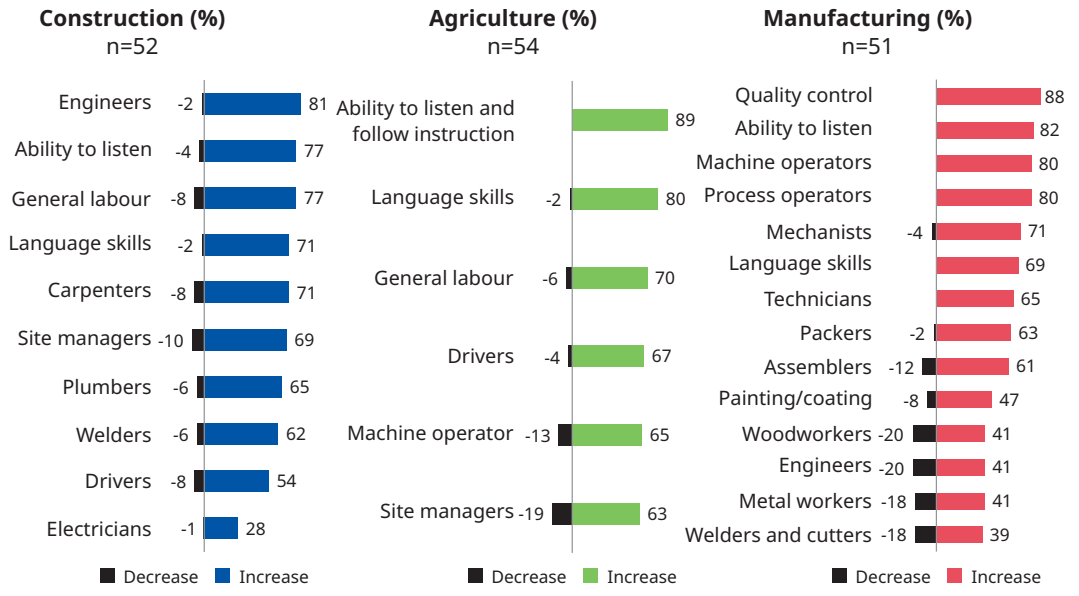
3.3.2 Job skills needed for future workers

Given the current shift taking place, from low-skilled to medium- and high-skilled work in the Ethiopian labour market, what kind of technical skills and what kind of work will be in demand for Ethiopia's future?

Interviews with employers in construction, agriculture and manufacturing revealed specific needs within each of these sectors. Enterprises in the construction sector indicated a broad demand for low-, medium- and high-skilled workers, but a high demand (and undersupply) for medium- and high-skilled workers with specific technical skills such as plumbers, electricians and engineers; and management skills such as site managers. As shown in

figure 12 below, within construction, employers indicated an increased need for workers with core skills such as the ability to listen and language skills. In addition, employers indicated increased needs for a broad set of technical skills. Within agriculture, interviewees stated a similar demand for both technical and core skills such as the ability to listen and language skills. Roles in high demand within agriculture will continue to include low- and medium-skill positions such as drivers and general labourers in addition to medium- to high-skill positions such as machine operators and site managers. In manufacturing, core skills will also be in demand, and demand will emerge in the form of a number of medium- and high-skilled technical roles.

Figure 12. Future skills requirements by sector



The importance of core skills also came up in several of the stakeholder interviews:

> *"I choose workers from any skill levels with the ability to quickly become familiar with technology and ability to come up with creative solutions for work-related problems"* (Employer)

3.4 Recruitment practices and challenges

3.4.1 How workers are recruited and positions filled

Ethiopian enterprises explained that they source workers through a range of different means, from within and outside of Ethiopia, depending on the skill sets required and the supply of workers available. Domestically, within Ethiopia, the most common sourcing methods were stated as being informal networks, which match workers to jobs by word of mouth through kinship and friendship networks. The stakeholders interviewed cited improving the recruitment process as a way of better matching the skills of employees to specific roles. One key informant from the Job Creation Commission noted:

> *"Most low-skilled labourers migrate to towns without any information about their chances for employment."* (Job Creation Commission in Addis Ababa).

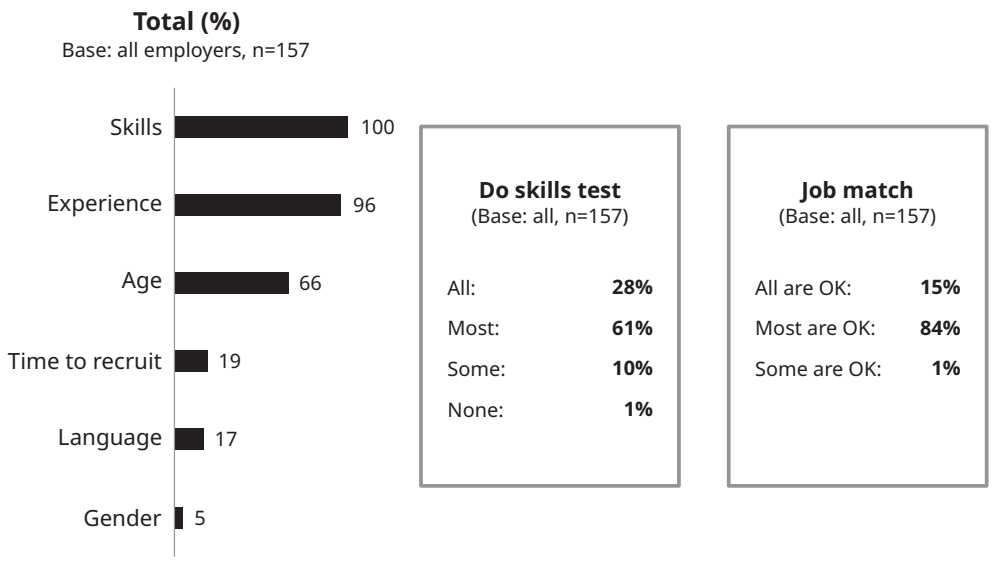
As indicated in the above quote, rural to urban migration is undertaken by some Ethiopians as a means for low-skilled workers to find employment in labour markets in which a higher demand exists than in their local area. For both men and women, travelling to towns is a way of connecting with employers, but with no guarantee of work other than drop-ins and kinship/friendship networks. A Government official explained:

> *"A lot of recruitment domestically seems to be done informally through private networks such as families, friends, word of mouth, newspaper, TV and radio. There are also a few private players and companies that reach out by themselves."* (Government advisor/expert).

Among enterprises surveyed, 84 per cent of male workers and 80 per cent of women workers were recruited through these informal means. In all three growth sectors (construction, agriculture and manufacturing), recruitment firms and recruitment agents were rarely used for hiring either men or women.

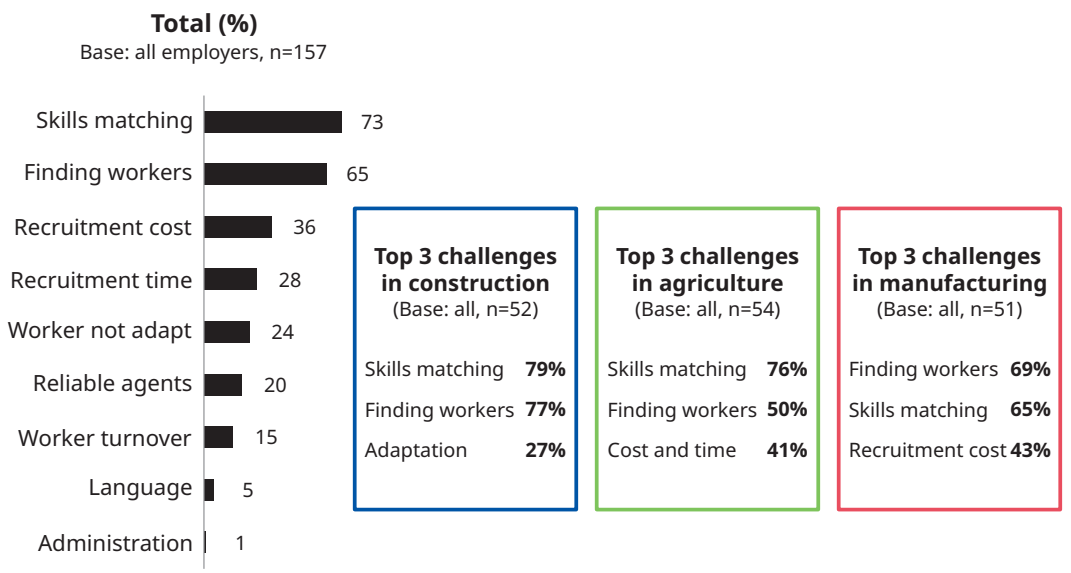
The means of recruitment (informal/formal) and an over-reliance on kinship-friendship networks poses challenges for enterprises in recruiting appropriately skilled workers for the right positions. Among the enterprises surveyed, further difficulties were identified with regard to recruitment (figure 13, below). Employers said they consider skills (100 per cent of employers), experience (96 per cent of employers) and age (66 per cent of employers) when recruiting. These three criteria (skills, experience and age) are far more highly valued than the time it takes to recruit a prospective employee (19 per cent of employers), the language spoken by a prospective employee (17 per cent of employers) or the gender of a prospective employee (5 per cent of employers). But these recruitment procedures are not commonplace. For example, only 61 per cent of employers surveyed said they give prospective workers a skills test. As a result of these frequently informal recruitment processes, only 15 per cent of employers stated that all of their employees are OK for the job.

Figure 13. Common job selection criteria and job matching in Ethiopia



Difficulties in recruitment exist across the three key sectors (construction, agriculture and manufacturing) (figure 14, below). In construction, for example, difficulty in skills matching was reported by 79 per cent of employers and finding workers by 77 per cent. In agriculture, skills matching and finding workers were also the biggest challenges, while 41 per cent of employers in agriculture also stated difficulties in managing the cost and time of finding workers. Similarly, 69 per cent of enterprises in the manufacturing sector reported challenges with finding workers; 65 per cent said they struggle to find workers with the appropriate skills and 43 per cent thought the costs of recruitment to be too high. These results are consistent with past studies involving returning migrants (ILO 2019), which found that reintegration support did not help returnees to access employment opportunities and that reintegration support did not place a focus on linking returnees with employment services offered through private employment agencies.

Figure 14. Recruitment challenges in Ethiopia



3.4.2 Job entitlements and training support

After an Ethiopian enterprise successfully hires a worker, there are a number of entitlements and training that often follow recruitment (table 6, below). Ninety-two per cent of employers reported that overtime pay is an entitlement that new hires can expect to receive, while 89 per cent said sick leave and 80 per cent said annual leave are included as job entitlements. Less common entitlements include health insurance (33 per cent), freedom of association (41 per cent) and one day off per week (68 per cent). A sectoral view of entitlements indicates that, among the enterprises surveyed, construction had the lowest number of entitlements (5.0), while manufacturing had the highest (5.9). Agriculture offered, on average, 5.5 entitlements for an employee.

Table 6. Job entitlements provided in Ethiopia

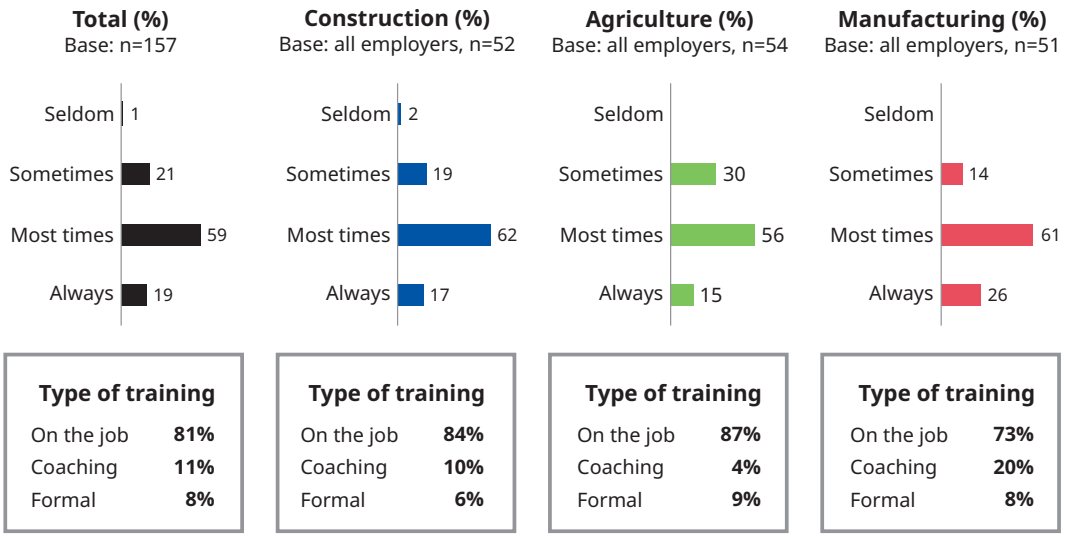
Job entitlements	Total n=157 (%)	Construction n=52 (%)	Agriculture n=54 (%)	Manufacturing n=51 (%)
Minimum wage	75	71	74	78
Overtime pay	92	89	91	98
Annual leave	80	62	89	88
Health insurance	33	35	30	33
Freedom of association	41	29	41	53
Sick leave	89	83	87	98
One day off per week	68	62	67	75
Maternity leave	69	65	72	71
Average No. of entitlements	**5.5**	**5.0**	**5.5**	**5.9**
Complaint handling				
Have system for complaints	96	92	98	96

Some enterprises offer formal and informal training as a means for upskilling workers (figure 15, below). Across each of the three sectors surveyed, employers said that they provide on-the-job training 81 per cent of the time. Formal training, however, was only offered an average of 8 per cent of the time. A government-employed interviewee explained:

> *"Besides job training, core skill training such as communication, professionalism basic technologies are provided (...). Truly, we appreciate what the government has done in terms of widening furnished training centres within a short period of time. But in terms of providing skill training, we noted there is a shortage of training tools, especially from Regional TVET centres."* (Government advisor)

A sectoral view of job training provided indicates similar findings. In construction, 62 per cent of employers stated that they offer training most of the time. Eighty-four per cent of training offered in construction is on-the-job training, 10 per cent coaching and 6 per cent formal training. Similarly, 56 per cent of agriculture employers said that they 'most times' offer training. Eighty-seven per cent of training offered in agriculture is on-the-job training, 4 per cent coaching and 9 per cent formal training. In manufacturing, 61 per cent of employers said that they offer training most of the time. Seventy-three per cent of the training in manufacturing is on-the-job training, 20 per cent coaching and 8 per cent formal training. Employers' responses indicate that there is likely a need for increased formalized employee training across the sectors surveyed as a means to better equip and upskill the workforce.

Figure 15. Job training provided by sector in Ethiopia



3.5 GULF

3.5.1 GCC states' labour market

Fifty years after the initial oil boom, the ME oil and gas sector continues to dominate the economic activity of GCC states. Recognizing that these resources are finite, governments in the region have looked to diversify their economies and shift away from being "rentier states" reliant on natural resources to a knowledge economy. Such a shift in the nature of work and the GCC economies requires both investments in the technologies of the fourth industrial revolution; namely, the automation of labour, developing AI solutions and building capacity in the domestic labour force.

3.5.2 Labour market trends in KSA, Kuwait and UAE

As the economies of the ME region shift, labour markets will also change in terms of who works and what kind of work people do. Foreign nationals make up the majority of the population in Bahrain, Kuwait, Qatar and the UAE (and more than 80 per cent of the population in Qatar and the UAE). Indeed, the proportion of non-nationals in the employed population in GCC countries is among the highest in the world with an average of 70.4 per cent, ranging from 56 to 93 per cent for individual countries. Migrants in the UAE and Saudi Arabia rank second and third globally in terms of remittance outflow (after the United States), while Kuwait and Qatar rank eighth and tenth respectively (ILO 2019).

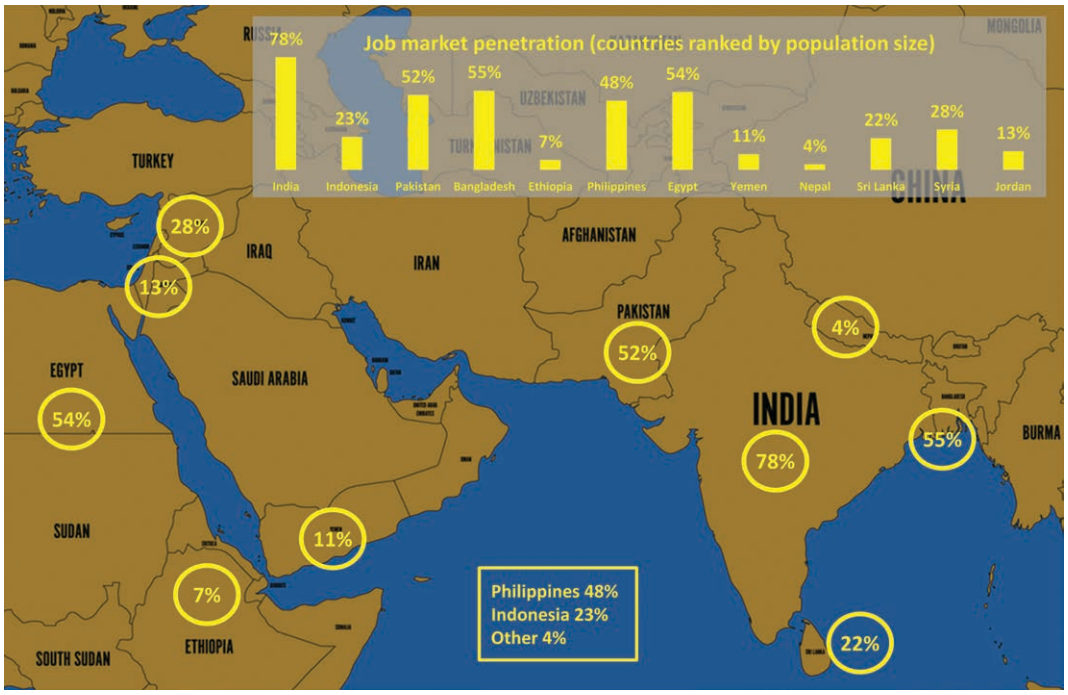
Although governments in KSA, Kuwait and UAE are encouraging more locals to enter the workforce, the demand for migrant workers will continue to grow over the next ten years in GCC states, with demand strongest in the construction, care work, hospitality and agricultural sectors. In particular, an ageing population, low fertility rates and more women entering the workforce in these countries mean that a further 2.1 million migrant domestic workers will be required and that the meaning of care work will shift from housekeeping to in-home paid care (Tayah and Assaf 2018). This shift in regional demographics will require more specialized training for care workers as the focus of domestic work moves to working with children, the elderly and the disabled.

3.5.3 Source of migrant workers in KSA, Kuwait and UAE

Migrant workers comprise the majority of the workforce in KSA, Kuwait and the UAE. Based on the interviews with employers, figure 16 below shows the top countries from which migrant workers are sourced in the Middle East. The percentages indicate the proportion of employers overall who hire workers from each country. Many employers hired workers from more than one source country; in fact, employers hired from four different countries on average. The graph inside the map shows job market penetration by sending countries and how the penetration rate compares across source countries based on their population size. If migrant workers from each country were in equal demand, larger countries would have a larger share of employers hiring from them and vice versa. But this is not the case. At the

moment, across KSA, Kuwait and UAE, the majority of migrant workers are hired from India. In the proportion of employers who hire workers from each country of origin, Bangladesh accounts for the second-highest share of employers (55 per cent) in the GCC, together with Egypt (54 per cent), closely followed by Pakistan (52 per cent) and the Philippines (48 per cent). Outside of the South Asia region, the Philippines and Indonesia are the countries with the highest share of jobs in the GCC states. Ethiopia is the fifth largest (in population) of the countries sending migrant workers to GCC states, but only commands around 7 per cent of the GCC job market. This study did not uncover a direct explanation for this disparity. Traditionally, most migrant workers from Ethiopia have been women seeking jobs as domestic workers. Until early 2018, Ethiopia also had a migration ban in place. Regardless of the explanation, the relatively low penetration rate suggests that there is an opportunity for Ethiopian migrant workers to gain a greater share of the job market in the GCC region.

Figure 16. Source of migrant workers and share of jobs in the Gulf



Some of the stakeholders interviewed indicated that Ethiopia's education system needs to improve in order for the country to produce more competitive workers. A person in Tigray had the following to say:

> *"As there are many workers that please their employers, there are also some that fail to fulfil their employer's skill requirements. The thing is, as a country we should work on our educational systems from the grassroots"* (Job Creation Commission)

With comparatively low market penetration, it is likely that better training and improved job matching will increase Ethiopia's share of the three target states' (KSA, Kuwait and UAE) job market.

3.5.4 Employers profile

Employers surveyed for this study were located in urban centres of the GCC. Specifically, all employers surveyed in Kuwait were based in Kuwait City, employers in KSA were split 50/50 between Riyadh and Jeddah, while UAE employers were divided between Dubai (57 per cent) and Sharjah (43 per cent).

The disaggregation of employers by sex was less balanced in the Gulf survey findings than in the Ethiopia surveys. For example, in KSA, 97 per cent of employers surveyed were male; in Kuwait, 78 per cent were male; and in UAE, 69 per cent were male. In terms of the size of enterprises surveyed, overall 45 per cent of employers were classified as small, with under 20 employees; 14 per cent were medium-sized enterprises, with between 20 and 49 employees; and 41 per cent were large enterprises with 50 employees or more.

Within the 363 enterprises surveyed (table 7, below), 34 per cent were private employers employing care workers. Six per cent were business owners, 19 per cent were business managers, 27 per cent were senior managers, and 15 per cent were supervisors. The average number of time in the aforementioned employer positions was eight years. An overall look at the profiles of employers shows that 33 per cent of employers surveyed were located in Kuwait, while there was an even distribution of employers surveyed between Riyadh, Jeddah, Dubai and Sharjah. Within the KSA, 50 per cent of employers surveyed were located in Riyadh and 50 per cent in Jeddah. In Kuwait, all employers surveyed were in Kuwait City, while in the UAE there was an even split between Dubai and Sharjah.

Table 7. Employer profiles by country in the Gulf

City	Total n=363 (%)	Construction n=122 (%)	Kuwait n=121 (%)	UAE n=120 (%)
Riyadh	17	50	-	-
Jeddah	17	50	-	-
Kuwait City	33	-	100	-
Dubai	19	-	-	57
Sharjah	14	-	-	43
Sex of employer				
Male	81	97	78	69
Female	19	3	22	31
Business size				
Small: under 20 employees	45	39	51	44
Medium: 20-49 employees	14	12	15	14
Large: 50 employees or more	41	49	34	42
Position				
Business owner	6	9	2	7
Business manager	19	21	7	28
Senior manager	27	14	36	31
Supervisor	15	23	21	1
Private employer (care workers)	34	34	35	33
Seniority				
Years in current position	8	7	6	11

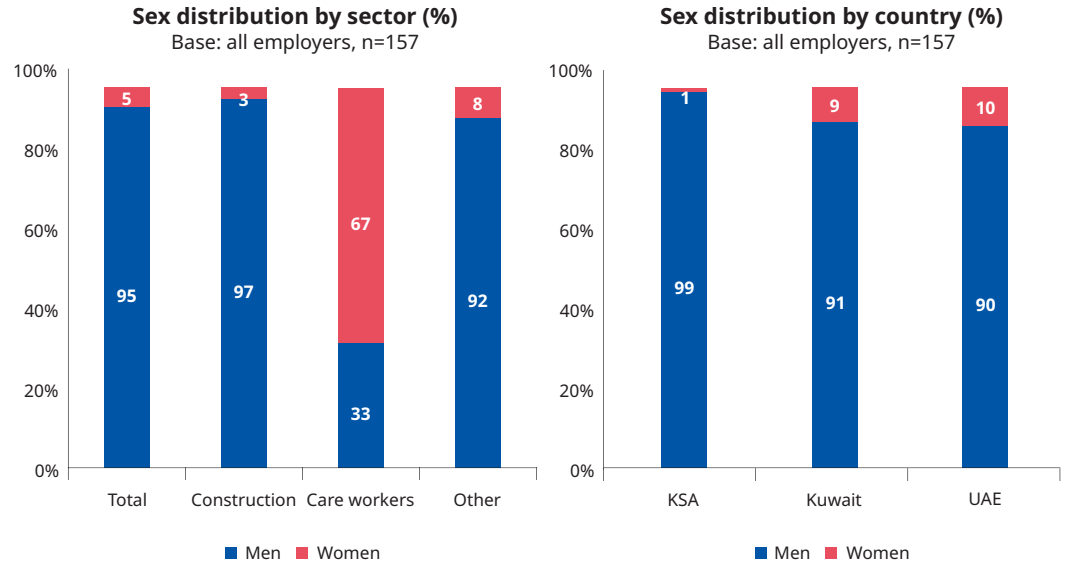
Analysing employer profiles by sector offers further insights into the size and distribution of the enterprises surveyed in the three countries (table 8, below). Specifically, a notable feature of the Gulf survey was the gendered distribution of employers. In the construction sector, over 90 per cent of surveyed employers were male; this was true also in the Other sector, which included agriculture, waste management, gardening, retail, transportation and tourism. In contrast, in the care work sector, 59 per cent of employers surveyed were male, while 41 per cent were female. Such an imbalance in the gendered distribution of employers is not surprising, given that care workers work in private households and the targeted decision-maker regarding care work could be either male or female.

Table 8. Employers profile by sector in the Gulf

City	Total n=363 (%)	Construction n=122 (%)	Care workers n=121 (%)	Other n=120 (%)
Riyadh	17	16	17	17
Jeddah	17	17	16	17
Kuwait City	33	33	34	33
Dubai	19	17	18	21
Sharjah	14	16	15	12
Sex of employer				
Male	81	94	59	91
Female	19	6	41	9
Business size				
Small: under 20 employees	45	1	NA	32
Medium: 20-49 employees	14	18	NA	23
Large: 50 employees or more	41	81	NA	45
Position				
Business owner	6	3	-	14
Business manager	19	30	-	26
Senior manager	27	48	-	34
Supervisor	15	20	-	25
Private employer (care workers)	34	-	100	-
Seniority				
Years in current position	8	7	3	8

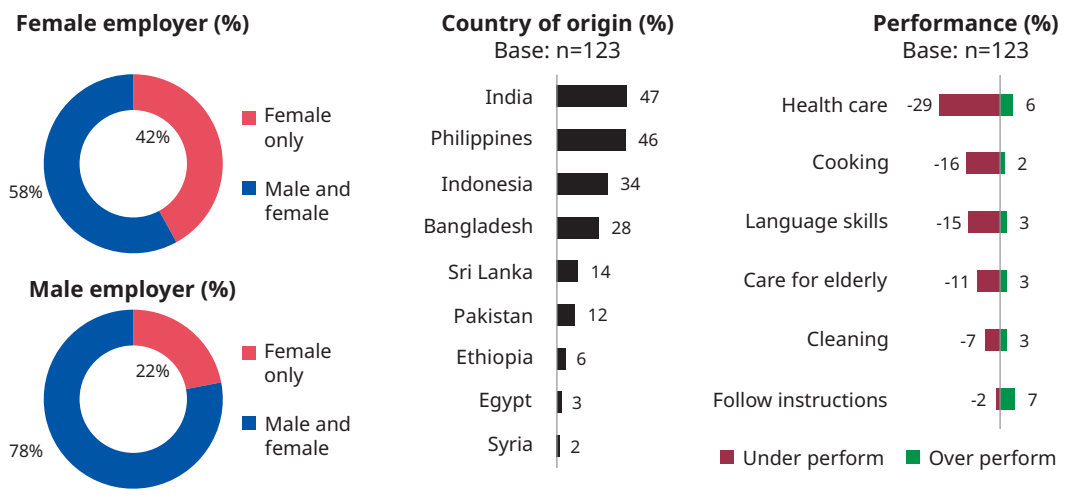
Employers were asked how many employees they had and how many of their employees are either male or female (figure 17, below). In terms of the sex distribution of employees across each of the three sectors surveyed – construction, care work and Other – 95 per cent of the employed workforce are male, according to employers. This gender imbalance is reflected in all three countries. In KSA, 99 per cent of workers are male. In Kuwait, 91 per cent of workers are male, and in UAE, 90 per cent of workers are male. In the construction sector, this imbalance was particularly stark, where 97 per cent of workers are male. In the Other sector, the imbalance is also noticeable, with 92 per cent male. In contrast, within care work, 67 per cent of workers are female.

Figure 17. Workers composition by sex in the Gulf



A closer look at the profile and perceived performance of care workers in private employment in the Gulf (figure 18, below) reveals that male employers tend to employ more male than female care workers. In contrast, female private employers are more balanced in their hiring of male and female care workers. In terms of country of origin, again we see that Ethiopian's contribution to the care work sector has been relatively small compared to other countries, such as India, Philippines, Indonesia and Bangladesh. The third graph in figure 18 shows job performance in relation to common work tasks. Employers rated their care worker's performance, and results are shown for the proportion of care workers rated as overperforming and underperforming. On average, more care workers were rated as underperforming, particularly in healthcare, cooking and language skills. In sum, care work is an under-served market with opportunities for growth.

Figure 18. Profile and perceived performance of care workers in the Gulf



3.6 Skill levels of migrant workers in the GULF

A look at the skill levels of current workers in the three Gulf countries showed that employers hire workers of all levels, including low-, medium- and high-skilled roles in construction and other sectors. Low-skilled workers are most dominant in the construction sector, where 68 per cent of employers said most of their workers were low-skilled. In the Other sector of mixed industries, 34 per cent of employers had mostly medium-skilled workers, and 28 per cent had mostly high-skilled workers. This shows that skill levels in major growth sectors tend to have workers with on average higher skills level compared to Ethiopia.

Within the care work sector, the majority (80 per cent) of employers hired medium-skilled workers, and 20 per cent hired high-skilled workers. For this survey, employers who hire care workers were explicitly targeted based on the duties they performed. Hence, the higher skill level required for care workers seems reasonable, given that this type of job often require a higher set of skills (e.g. languages, cooking, basic healthcare, etc.) compared to regular domestic workers. Nevertheless, it is worth pointing out that care workers and domestic workers are considered to be the same under the law in Gulf countries, and the ILO Convention on Domestic Workers (C189, 2011) has not been ratified in any of the three Gulf countries covered by this study.

Analysing the breakdown of skills by country did not throw up any significant differences when comparing how many employers hire low-, medium- and high-skilled workers across the KSA, Kuwait and UAE. In terms of the skill level of most workers; however, Kuwait diverged from KSA and UAE in that 52 per cent of employers hired mostly medium-skilled workers. KSA and UAE, on the other hand, had more employers who said they mostly hired high-skilled workers. This shows that the skill levels of workers in Kuwait may, on average, be lower when compared to the other two countries.

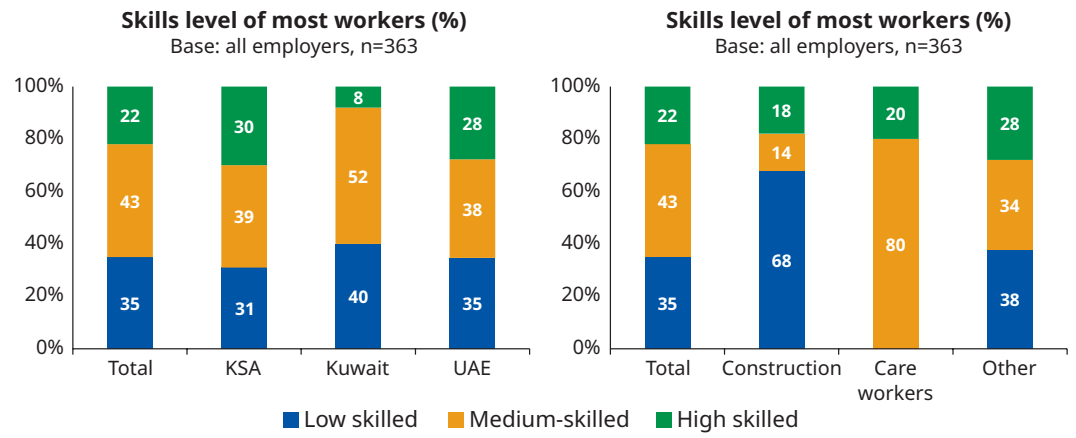
3.6.1 Supply and demand for skills in KSA, Kuwait and UAE

Across the Gulf in the three key sectors, employers surveyed in construction expressed a demand for low-skilled workers. Care work employers expressed a demand for medium- and high-skilled workers, while responses from Other sector employers suggested a moderate demand for low-, medium- and high-skilled workers.

Across the three countries surveyed in the Gulf, employers hired a mix of workers with different skills levels. Unlike Ethiopia, the concentration of skills levels varied across countries and sectors (figure 19), Across the countries, the large proportion of employers hired mostly medium-skilled workers, but in both KSA and UAE, nearly one third of employers interviewed said they hired mostly high skilled labour. In contrast, Kuwait had a large proportion of employers (40 per cent) who hired mostly low-skilled workers. Across the sectors, the differences were even starker. In the construction sector, two thirds of employers (68 per cent) mostly employ low-skilled workers. In contrast, employers of care workers hire mostly

medium-skilled workers (80 per cent). In the Other sector, there was a mix with around one third of employers mostly hiring either low-, medium- or high skilled workers. This shows that demand for workers with different skills levels is likely to vary across sectors, with care workers and Other sectors having demand for more highly skilled workers.

Figure 19. Skills levels of most workers in the Gulf by country and sector

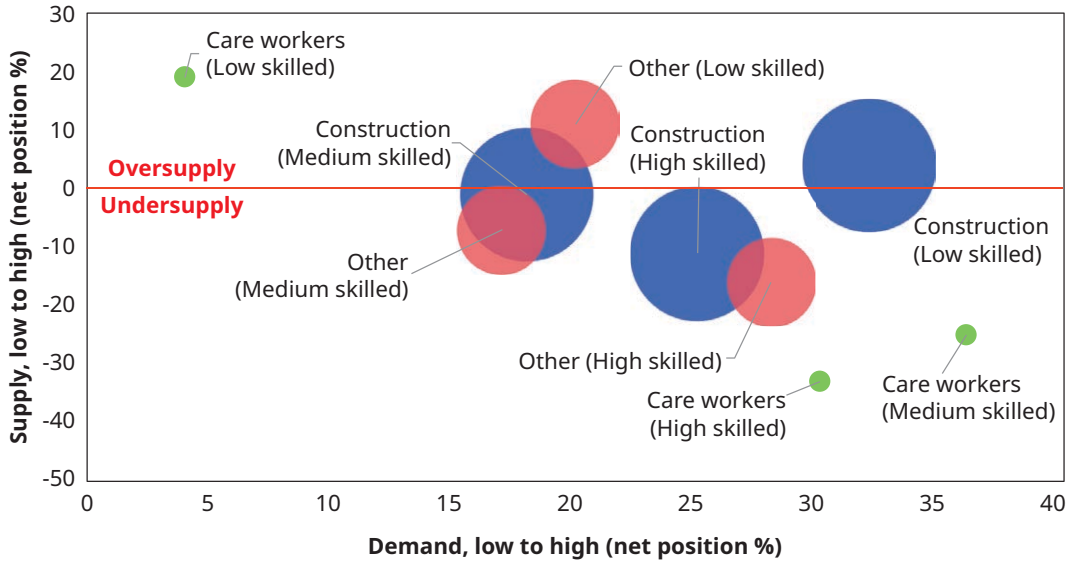


To better understand future demand for workers with different skill levels, employers were asked whether their needs for workers would increase or decrease in the next few years. As with the Ethiopia employer survey, supply was measured by asking the employers whether it was easier or more difficult to find workers of different skill levels. The results are shown in figure 20 below and are then broken down by sector in the graphs which follow.

In terms of labour force demand and supply (figure 20, below) across all sectors, it is difficult to draw broad generalizations about what level of skills are most sought after. This is because there is such a difference across the sectors. In care work, for example, there is a very high demand for medium-skilled workers, followed by high-skilled workers (the demand for low-skilled care workers is very low). In construction, on the other hand, we see a high demand for low-skilled workers, followed by high-skilled workers (medium-skilled workers are still in demand, but not as much). Meanwhile, in the Other sector, there is a high demand for high-skilled workers, followed by low and medium-skill levels.

In terms of over/undersupply of skills, figure 20 also shows that, in care work, high-skilled and medium-skilled workers are in low supply (low-skilled workers are oversupplied). In construction, high-skilled workers are in undersupply but low- and medium-skilled workers border over/undersupply, while in Other employment, medium- and high-skilled workers are in undersupply, while low-skilled workers are oversupplied.

Figure 20. Demand and supply for skills levels by sector in the Gulf



3.6.2 Supply and demand across key growth sectors

Across the UAE, KSA and Kuwait, there were distinct patterns indicating where skill levels are required within each of the three growth sectors. Breaking down these findings further, in the construction sector figure 21 (below) shows a clear pecking order from high demand and low supply to low demand and high supply. The greatest demand was for electricians, plumbers and engineers, areas where there was also a low supply of such roles. These jobs are typically high-skilled (see Annex II). On the other hand, there was a low demand and a relatively lower undersupply of drivers, welders, carpenters and general labourers. Perhaps of most significance, in terms of identifying potential areas of labour market penetration, is that there is an undersupply of workers across all construction jobs. Only drivers and general labourers cross slightly into oversupply.

In the care work sector, interviews with employers indicated that elderly care and healthcare were split into those employing female workers and those employing both females and males (figure 22, below). It should be noted that there is undersupply across all care worker job types. The highest demand for care work was for female healthcare workers, currently also the most undersupplied demographic. Health and elderly care provided by females and males followed next in terms of high demand. Elderly care provided by female care workers is in the least demand and highest supply, but the fact that there are demand and undersupply indicates that there are opportunities for employment in this area.

Figure 21. Labour force demand and supply for construction jobs in the Gulf

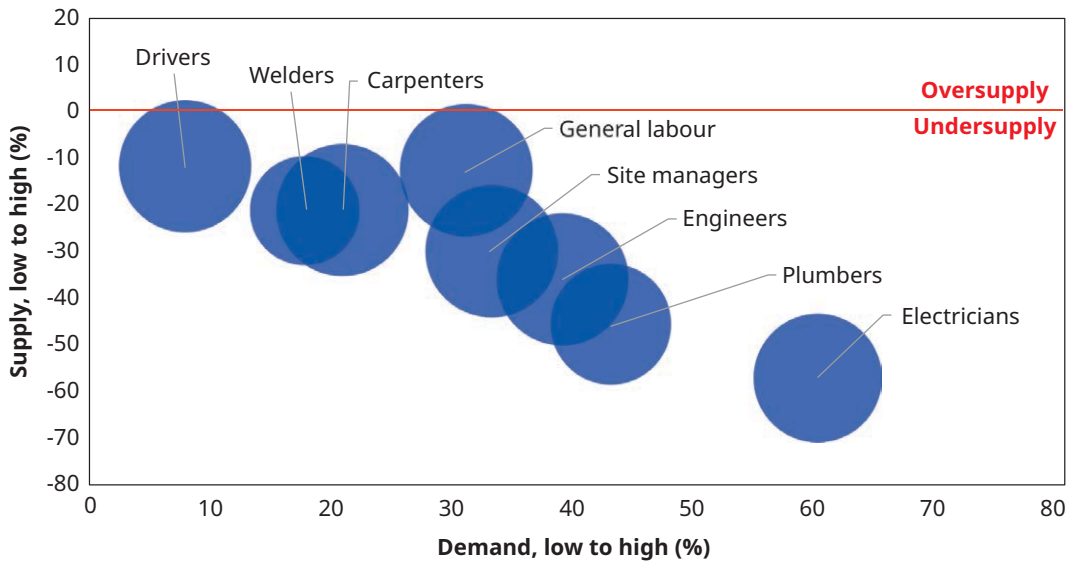
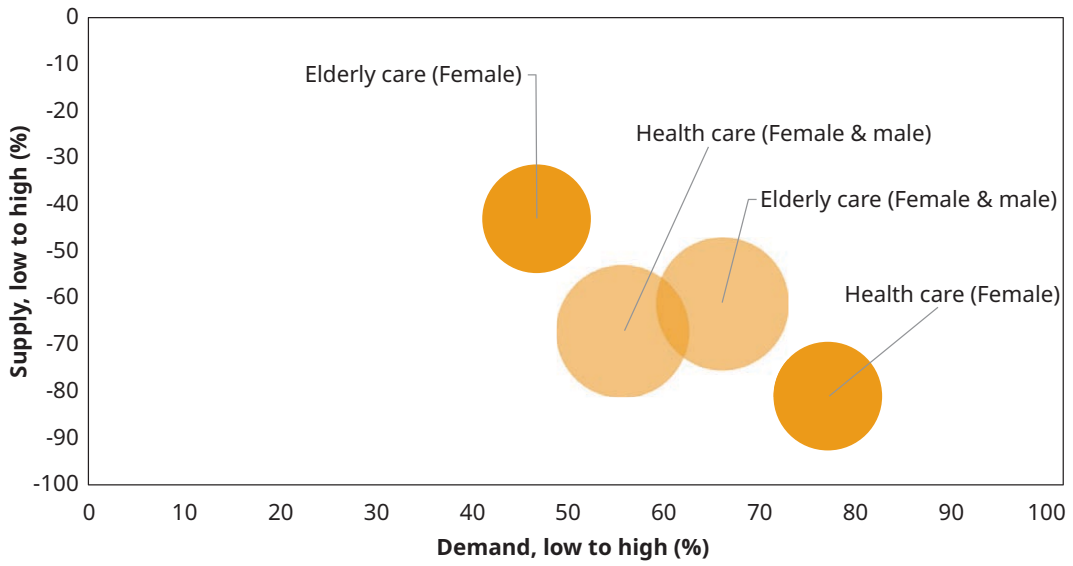
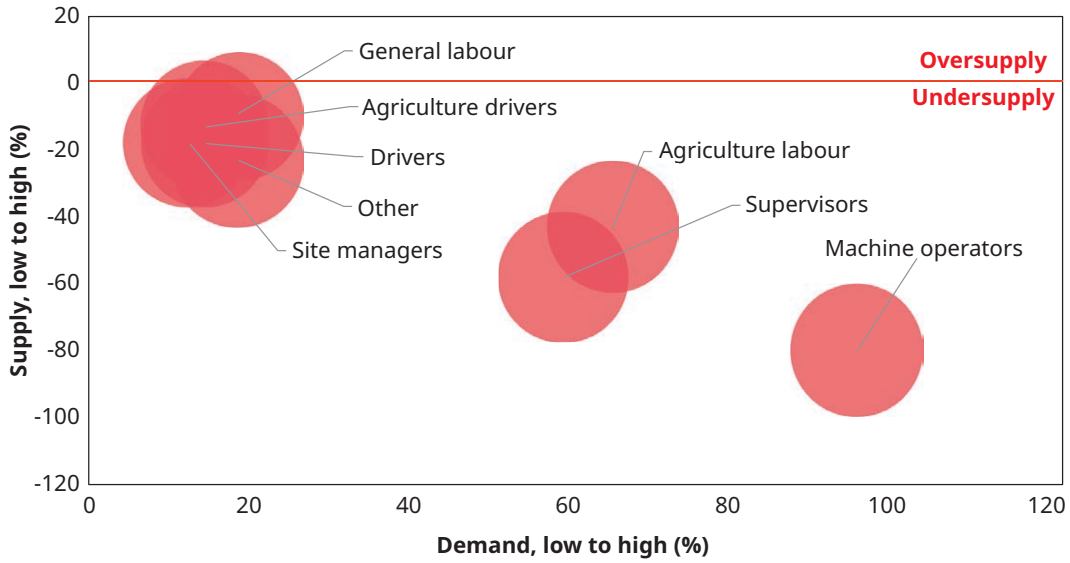


Figure 22. Labour force demand and supply for care worker jobs in the Gulf



In terms of the supply and demand for jobs in the other sectors, including agriculture (figure 23, below), employer responses indicated a high demand and a low supply of machine operators. Agricultural labour and supervisors were also in high demand, but with a moderately higher supply than machine operators. In contrast, positions such as general labourer in sectors other than agriculture, drivers and site managers were in relatively low demand but generally are undersupplied. Overall, this means that employers are indicating there are opportunities across all skill levels in the KSA, Kuwait and UAE agriculture, but that there is a far greater demand in highly-skilled positions.

Figure 23. Labour force demand and supply for other jobs in the Gulf



3.7 Future of work in GCC states

3.7.1 Gendered opportunities in KSA, Kuwait and UAE

The data collected and presented in this report suggest that there are a number of skills gaps and that employment opportunities diverge between the sexes in the GCC labour. Across all three key sectors – construction, agriculture and manufacturing, employers registered an undersupply of workers. For example, employment patterns and preferences in the Gulf suggested that men are more likely to find work in construction and Other sectors. In the care work sector, there are increasing employment opportunities for female workers in private employment, especially in medium- and high-skilled roles taking care of the sick and the elderly.

3.7.2 Shift to middle- and highly-skilled work

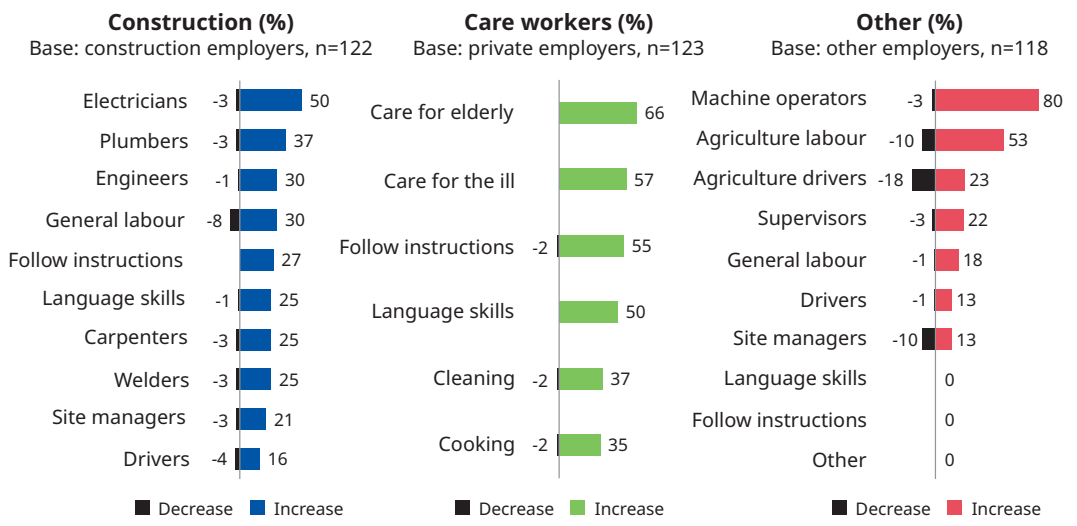
Within the GCC labour market, there is a shift taking place from low-skilled to medium- and high-skilled work. Future demand for jobs will reflect these broader skill level shifts. For example, in construction, it is expected there will be a growing demand for electricians, plumbers, engineers and site managers, all medium- to high-skilled positions. In the care work industry, a similar demand is growing for carers with the required skills to take care of sick and elderly. In the Other sector, which includes agriculture, waste management, gardening, retail, transportation and tourism, there will be a demand for medium- and high-skilled jobs such as supervisors, machine operators and agricultural labour.

Given these future demands across the three growth sectors, there are several priority skills for improvement. In construction, the skills associated with plumbers, electricians, welders and carpenters can be targeted for TVET and other training programmes. In care work, skills such as caring for the sick and elderly, cooking and language skills should be targeted for improvement. Meanwhile, in Other sectors, improving the skills required for training machine operators, supervisors, agriculture drivers and language skills will likely result in a higher-skilled workforce that better matches the future demands of the Gulf labour market.

3.7.3 Job skills needed for future workers

In the Gulf, future employers will have specific needs in terms of both technical and core skills. In the construction sector, for example, employers expressed a growing demand for technical skills related to electrician, plumber and engineer roles. Having said this, employers also indicated that there would continue to be a need for general labour in the construction sector. In the future, there will be a need for care workers who have cleaning and cooking skills and expertise in caring for the sick and the elderly. In Other sectors, there will also be a demand for machine operators and agriculture labourers in particular. In construction and care work, there will be a growing demand for workers with core skills, in particular the ability to follow instructions, to learn quickly and to communicate in the language of the employer, as shown in figure 24 below.

Figure 24. Future skills requirements by sector



3.8 Recruitment practices and challenges

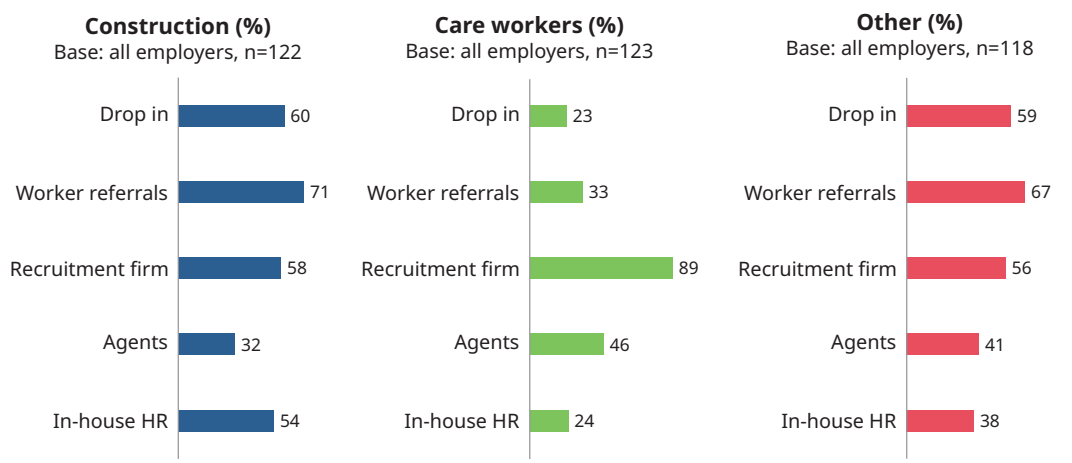
In contrast to Ethiopia, where the majority of workers are employed by means of informal networks (kinship/friendship networks), in the Gulf recruitment firms played a central role in hiring workers for specific roles (figure 25, below). The fact that the majority of workers come from overseas could well explain this difference and suggests that the Gulf has a more formal and more developed recruitment system than Ethiopia. Having said this, in construction, drop-in and work referrals featured highly as a way that workers find employment, while recruitment firms, agents and in-house human resources were also a common means of filling positions. Recruitment firms and agents also played a dominant role in the care work sector in connecting employers with potential workers. In Other sectors, there was a broader distribution of information sources through which employers connect with potential workers, with drop-ins, worker referrals and recruitment agencies central to the process. Some of the stakeholders interviewed expressed the need for more transparency during the recruitment process:

> *"We need to strengthen and make the recruitment system more transparent so that the sending country know what is happening to the migrant worker."* (Job Creation Commission in Addis Ababa)

According to Gulf legal frameworks, in Kuwait charging workers recruitment fees is not explicity prohibited; however, charging domestic workers fees is illegal according to Law No. 68 on Domestic Workers and Ministerial Decision No. 2194 (2016). In contrast, while it is illegal to charge such fees in the UAE and KSA private sector, in KSA, charging recruitment fees to domestic workers is not explicitly prohibited (ILO Fairway Fact Sheet 2019).

Further, Kuwait allows verbal contracts for private-sector workers (but not for domestic workers), while in UAE and KSA contracts need to be written, and these official documents are referred to in the event of a dispute. Recruitment processes such as these should be regulated and made simpler.

Figure 25. Information sources by sector in the Gulf

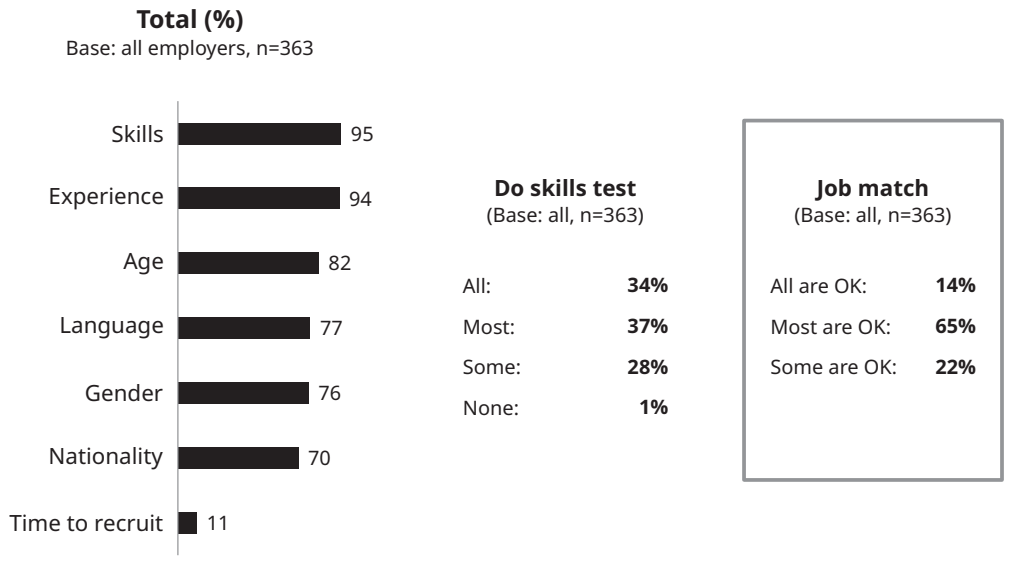


Further disaggregating the above data by sex offered insights into how male and female workers were recruited. The recruitment of male workers, for example, was commonly done through direct recruitment in the Gulf (54 per cent), direct recruitment from overseas (33 per cent), followed by recruitment firms (54 per cent) and recruitment agents (27 per cent). In comparison, fewer female workers were recruited directly, with 44 per cent of women hired in the Gulf and (19 per cent) from overseas. In most cases, recruitment firms were used to recruit women workers (54 per cent), followed by recruitment agents (22 per cent).

3.8.1 How workers are found and positions filled

Gulf interviewees explained that the selection criteria for the recruitment process often required accounting for the skills, experience, age and language of the applicant. At times, gender and nationality also play a role. Still, the study did not uncover in what way nationality matters, whether in relation to regulations governing recruitment or based on some form of bias (figure 26, below). When asked if a skills test is required, 34 per cent of surveyed employers stated that all applicants are subject to such a test; 37 per cent said that most applicants have to do a test; while 28 per cent said only some applicants sit such a test. The results of the recruitment process speak to the quality of the matches made. In this case, only 14 per cent of employers said the job matches were "All OK", while the majority – 65 per cent – said "most are OK". Some 22 per cent of employers were unsatisfied with the quality of the job matches, saying that only "Some are OK".

Figure 26. Common selection criteria and job matching in the Gulf



Gulf employers expressed several challenges to recruiting workers in each of the identified growth sectors. The top five challenges identified by employers were skills matching, government regulation, recruitment cost, the reliability of agents and finding workers (figure 27, below). In KSA, skills matching, the cost of recruitment and finding workers were

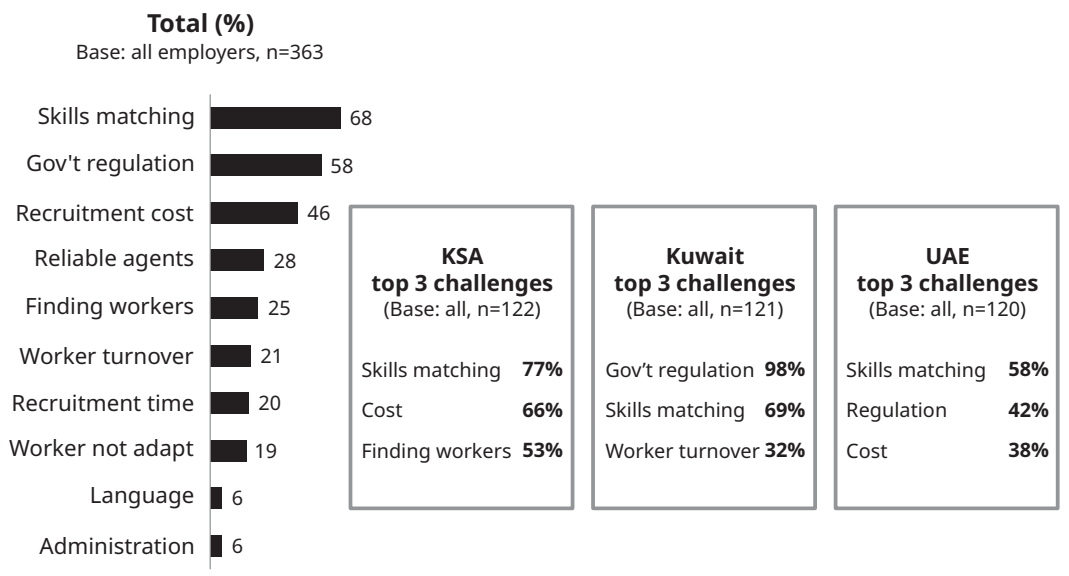
the top three challenges. In Kuwait, the challenges were government regulation, skills matching and worker turnover, while in the UAE employers struggled with skills matching, regulation and recruitment cost. Interviews with stakeholders highlighted the issue of cumbersome government regulation and difficulty with skills matching in connection with sending migrant workers to the Gulf, as expressed in the following comments:

> *"I would suggest that the bilateral agreements have to be revised and expanded to cover low-skilled and medium-skilled workers. It also has to minimize the internal processes that would have to be in place to send migrant workers abroad. The approval process could be simpler and stronger from both host and sending countries point of view"* (Government advisor/expert)

> *"The bilateral agreements between Ethiopia and the Middle East protect workers from exploitation but still requires changes and reforms so that the agreement could better match with worker supply and employer needs"* (Private recruitment agency)

> *"The bilateral agreements should include judicial solutions between the employer and the employee, for better protection."* (Job Creation Commission in Addis Ababa)

Figure 27. Recruitment challenges in the Gulf



Skills matching appears to be a significant challenge, but with the right training and a better matching of potential workers to employers both in Ethiopia and in the Gulf this is a problem that can be overcome. And having a bilateral agreement in place is, of course, better than not having one, as indicated by some of the stakeholders interviewed:

> *"Before the bilateral agreement, migrant workers suffered a lot in terms of low wages as well as with their life. But the bilateral agreement is helping them with everything. Now we're sending them with the required job skill so they can fit in the job market in the Middle East"* (Trainer in Oromia)

3.8.2 Job entitlements and training support

In GCC states, there are a number of entitlements and training supports offered to workers in each of the three identified growth sectors (figure 28, below). On average, there were 5.1 entitlements accorded to workers across the three sectors. Most commonly, employers said that a minimum wage, annual leave and health insurance were offered to workers. Employers' responses sometimes diverged from the laws of the three countries (KSA, Kuwait and UAE). For example, while in each country a minimum wage was said to be among the top entitlements for workers, only in Kuwait is a minimum wage is part of the regulatory framework governing migrant workers. In KSA and UAE, there is no minimum wage (ILO Fairway Fact Sheet 2019). Further, while employers said that overtime pay was common (construction 73 per cent; care work 46 per cent; Other 71 per cent), in UAE and KSA, it is only law to pay overtime in private-sector work (not domestic work).

The above caveats aside, employers reported that, in the construction sector, workers could expect 5.6 entitlements, which were likely to include the minimum wage, annual leave, one day off per week and health insurance. In Other sectors, workers were also likely to be entitled to minimum wage, annual leave, health insurance and one day off per week. In the care work sector, the average number of entitlements is considerably lower at 4.2, possibly reflecting a range of working conditions within private households and the lower level of regulations governing the care work sector. Employers reported that care workers were likely to be entitled to a minimum wage and annual leave, but less likely to enjoy other benefits such as overtime pay, health insurance, sick leave or one day off per week.

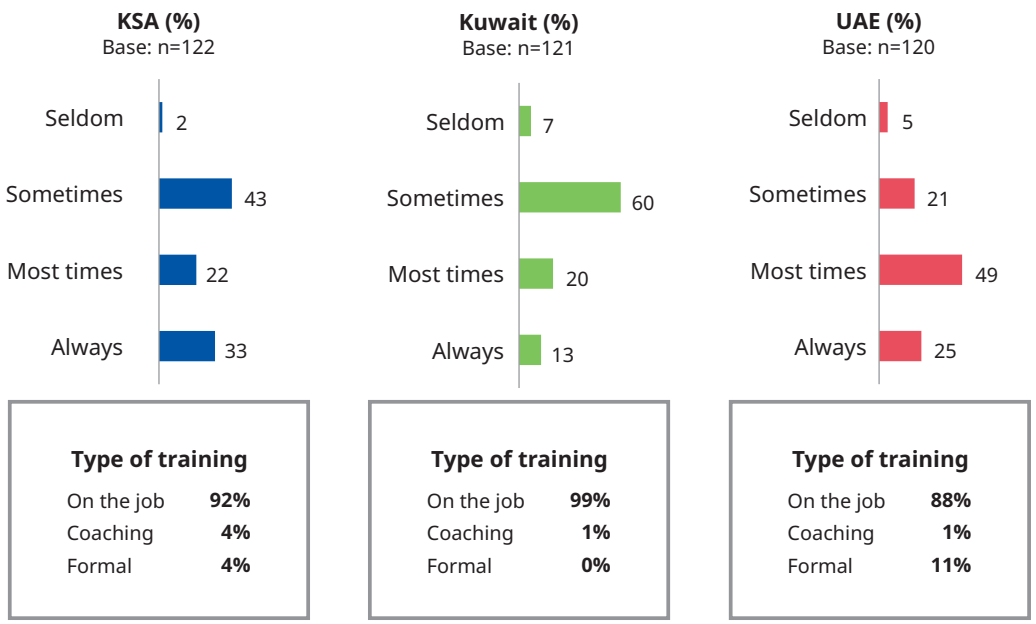
Figure 28. Job entitlements provided by sector in the Gulf

Job entitlements	Total n=363 (%)	Construction n=122 (%)	Care workers n=123 (%)	Other n=118 (%)
Minimum wage	98	98	97	98
Overtime pay	63	73	46	71
Annual leave	91	91	86	97
Health insurance	87	98	63	99
Freedom of association	19	25	4	30
Sick leave	54	62	40	62
One day off per week	84	90	74	88
Maternity leave	17	20	12	18
Average No. of entitlements	**5.1**	**5.6**	**4.2**	**5.6**
Complaint handling				
Have system for complaints	20	28	7	26

In terms of providing training in the Gulf (figure 29, below), employers in KSA stated that they sometimes (43 per cent) provide training and that the training provided is most likely to be on-the-job training. Further, in KSA, only 33 per cent of employers stated that they

always provide training for employees. Similarly, employers in Kuwait also said that they sometimes (60 per cent) provide training, and it is most commonly training provided as the employee works (on the job). Only 13 per cent of Kuwait employers said they always provide training for employees. In the UAE, employers said that they provided training most times (49 per cent) and that the training is also most likely to be provided on-the-job (88 per cent).

Figure 29. Training provided in the Gulf by country



IV. CONCLUSIONS

4.1 Future of work in Ethiopia

Ethiopia is a country experiencing both economic growth and a shift in terms of the nature of work. Specifically, as an urbanizing country, the labour market is moving away from traditional, rural-based work towards urban-based, industrial manufacturing and service sectors. As the country shifts from a labour market built on a low productive agriculture sector to manufacturing, industrial, service and construction, skills levels demanded to support this change are also changing, from low- to medium-skilled workers and medium- to highly-skilled.

The emerging requirements from the transformation of Ethiopia's labour market were reflected in interviews with Ethiopian employers, government employees, TVET trainers and private agency employees. Interviewees indicated a need for improved training, education and upskilling of workers. This included improved linkages of employers to the labour market; an increased focus on practical training (as opposed to theoretical teaching) in technical colleges and high schools; development of digital literacy; and a revaluation of how Ethiopian enterprises perceive Ethiopian workers (in comparison to foreign workers who were perceived as working harder).

Labour shortages were identified across the three key sectors surveyed, and particularly an undersupply of medium- and highly-skilled workers. Promoting employment opportunities within Ethiopia and preparing the workforce to fill these gaps needs to be done for both men and women. Within Ethiopia, there are employment opportunities for women across sectors, while in terms of overseas employment in the Gulf, employment opportunities for women have traditionally been restricted to domestic work, although care work has emerged as a potentially more attractive opportunity. In contrast, men are more employable across a range of sectors in Ethiopia and in the GCC states surveyed (KSA, UAE and Kuwait). Consequently, as the Ethiopian labour market changes and provides more medium- and highly-skilled opportunities, it will be necessary to consider employment within Ethiopia as the first choice for both men and women and migration for work as a secondary option.

While there is a high level of unemployment in urban areas in Ethiopia (19.1 per cent),[14] this challenge is also an opportunity to develop a medium- and high-skilled labour pool in construction, agriculture and manufacturing. The development of TVET programmes

[14] Urban Labour Force Survey 2018

designed to improve practical skills and core skills, for example, will contribute to a targeted upskilling and reskilling of the Ethiopian labour market, better preparing workers for employment opportunities within the country and overseas.

As the primary labour market for local employment, Ethiopia's TVET need to be better aligned to labour market demands. A focus on digital literacy, core skills such as the ability to listen and language skills, skilled training in healthcare and in technical roles will make Ethiopian workers – men and women – more employable both at home and overseas.

Further, recruitment practices in Ethiopia require improvement so that employers are better able to source information about low-, medium- and high-skilled workers. Kinship/friendship networks are a common way for enterprises to connect with prospective employees, the result being that workers are not always appropriately prepared for the employees and employers are not fully satisfied with their workers. The informal recruitment system needs to be formalized and improved. Further, the training that follows hiring, when it exists, is usually informal, on-the-job training that contributes to low productivity and time costs rather than formal training that positively impacts on enterprises and the workforce.

At this point in time, the country's skills shortage is not because people are migrating overseas for work, but because recruitment through word of mouth or drop-ins is not contributing to finding the right person for the right job in a timely and economically efficient manner, and because current approaches to capacity building of the workforce are informal and require standardization.

4.2 Future of work in GCC states

As part of a concerted shift from relying on natural resources to a knowledge economy, countries in the GCC region – such as KSA, UAE and Kuwait – are looking to prepare their economies for the future by means of both investment in new technologies such as automated labour; developing AI solutions, and building the capabilities of the domestic labour force.

However, the changing nature of work in GCC countries does not mean that the region's reliance on migrant workers will dissipate. Indeed, as the economies of GCC states diversify, there will continue to be a need for migrant workers, with demand strongest in the construction, care work, hospitality and agricultural sectors. Future migrant workers will be able to command higher wages and better working conditions if they receive training prior to arrival in GCC and are better matched to employment opportunities.

As with most post-industrial states, the GCC is experiencing demographic challenges associated with an ageing population, low fertility rates and more women entering the workforce than ever before. As a result, a further 2.1 million migrant workers will likely be required in the care work sector, and the meaning of care work will shift from largely focusing on housekeeping to home-paid care of the elderly, sick people and children.

Adding to the growing need for care workers, the healthcare industry is expected to be under increasing pressure as more GCC citizens suffer from age-related NCD and require professional support. Currently, the GCC healthcare industry is dominated by medium- and high-skilled foreign workers, in particular Filipino nurses and Western doctors. But interviews with employers show that satisfaction with the healthcare workforce is not high. This means that GCC countries will need to look further afield to find the skilled labour required to satisfy this growing need, and there is an opportunity for skilled Ethiopian workers with strong core skills to find work.

As GCC governments invest more capital in the digitalization of labour, specific middle- and high-skilled jobs skills will become highly sought after. In the construction and manufacturing sectors, roles such as plumbers, machine operators and electricians are currently in high demand, but in low supply. In contrast, there will continue to be a low demand but high supply for drivers, site managers and general labourers, and high demand for agricultural labour.

Across each of the three countries – KSA, UAE and Kuwait – skills matching and skills recognition will be a high priority, as enterprises seek to find the right person for the right position in a timely and cost-effective manner. Workers will need to be equipped with the skills to fill these skilled roles prior to arriving in the GCC, as our findings show that training, across sectors and regions, is limited to learn-as-you-go, on-the-job training.

4.3 Upskilling for employment in Ethiopia and GCC states

As Ethiopia continues to urbanize, upskilling and reskilling of the workforce will be required to fill positions in both the domestic and overseas labour markets. For both Ethiopia and the Gulf, there are opportunities to develop a highly-skilled labour pool in construction, agriculture, manufacturing, and care work.

Within Ethiopia, there is a need to improve the TVET sector, encouraging practical, targeted programmes that graduate potential employees into work sectors where there is a high demand for workers. Furthermore, currently there is too much reliance on informal modes of recruitment such as drop-ins and referrals from friends and family. Upgrading recruitment systems will allow for hiring the right person for the right job to ensure that employers both in Ethiopia and overseas get the best workers.

Overseas, in KSA, UAE and Kuwait Ethiopian workers appear to occupy a relatively low share of the job market, compared to workers from India, Bangladesh and Pakistan. The Ethiopian Government should work to address this shortcoming by working with GCC governments to encourage the recruitment of Ethiopian workers, as well as promoting work for Ethiopian men and women in the Gulf. For women, in particular, there are growing opportunities for medium- and highly-skilled care workers.

4.4 Improving protections for migrant workers to GCC states

Further to the need to support a shift in the Ethiopian workforce from low- to medium- and high-skilled and to better match Ethiopian workers to jobs both domestically and in GCC states, there is an urgent need to improve protection for migrant workers to the GCC region.

Employers' responses to survey questions were found to diverge from government regulations, highlighting an inconsistency in the application of labour laws to migrant workers. For example, employers in each of the Gulf countries surveyed pointed to minimum wage as an entitlement enjoyed by employees, but it is only in Kuwait that a minimum wage is guaranteed as part of the country's regulatory framework governing migrant workers.

In a further example, in terms of employment contracts, in all three countries employment contracts are legally required for workers (in Kuwait, verbal contracts are permitted in the private sector). In practice, however, across the key sectors identified, only 55 per cent of Gulf employers reported that they always provide an employment contract. Only 27 per cent of employers said that they provide a contract in the migrant's language. Providing an employment contract was most frequent in Kuwait, where 65 per cent of employers surveyed stated that they always provide a contract, and lowest in KSA, where 48 per cent of employers said they always use contracts. In the UAE, 52 per cent of employers surveyed said that they always provide a contract.

Contracts help both employers and employees to better understand the terms and conditions under which the relationship is entered into. But it is the practice of retaining workers' documents/passport that is especially problematic. In the KSA, UAE and Kuwait, it is prohibited by law to confiscate a worker's passport. Although illegal, in practice passport confiscation take place in the Gulf as per the "kafala" system.[15] Under the kafala system, the employer act as an in-country sponsor and the worker's visa is tied to their sponsor. Hence, the worker cannot leave without permission from the employer. Since the vast majority of migrants are female domestic workers, the kafala system places them at significant risk of not being allowed to leave at the end of the work contract.

[15] *Kafala* is a sponsorship system that regulates the residency and employment of workers in Gulf Corporation Council countries and includes anyone who works within a household (drivers, gardeners and maids). The sponsor is responsible for paying any recruitment fees and takes full economic and legal responsibility for their workers. Workers' visa status is tied to their sponsor. The contract period is typically for a minimum of two years, although it is not an agreement between the sponsor and a worker but between workers and their recruitment agency. If a contract is breached, the sponsor has the right to ask a worker to pay back the recruitment fee, unless the sponsor has committed abuse or proven violations. Through the kafala system, the sponsor has complete control over the mobility of migrant workers. The workers cannot resign or change jobs without consent from their sponsor. Workers are also not able to leave the country without first receiving an "exit visa" from their sponsor. Leaving without an exit visa is considered a crime, even if there is evidence of abuse. Leaving the sponsor renders workers with irregular status. Source: Centre for the Study of Labour and Mobility, 2012.

Case study 1: Migrant worker experience in the Gulf

Of migrant workers returning to Ethiopia, 49 per cent said they either had experienced unfree recruitment, meaning they were forced to work for an employer against their will or were deceived into taking a job that, had the worker been aware of the true working conditions, they would not have accepted. Some 60 per cent also experienced work and life under duress, which covers adverse working or living situations imposed on the worker. Women domestic workers are often required to be available for work at any time and are often required to work for several family members. Women migrant workers worked on average 16 hours per day and 82 per cent worked 7 days per week. Overall, 44 per cent also experienced impossibility of leaving their employer, a form of limitation on freedom and an essential ingredient of forced labour.

Establishing and enforcing labour law protections for migrant workers by strengthening bilateral agreements between Ethiopia and the GCC receiving countries would ensure that workers can change employers without being required to obtain their employers' consent first. Beyond this, abolishing the kafala system would afford domestic workers not covered by labour law greater control over their own rights, specifically the right to change employer.

V. RECOMMENDATIONS

5.1 Ethiopia

Future demand for higher skills levels coupled with the informal process that Ethiopian job seekers tends to rely on shows the increasing challenge faced by workers. Increasing access to vocational training for upskilling appears to be an essential strategy to adopt.

1. Review existing vocational training programmes to determine how suitable and accessible they are for Ethiopian job seekers, in particular low-skilled workers, and determine how existing training programmes can be made more suitable to meet the needs of these workers.
2. Align and expand TVET in Ethiopia to meet the demand for occupations within relevant growth sectors. This includes engineers, site managers, electricians, machine operators, process operators, mechanics, quality control, drivers and technicians (see ISCO job codes in Annex II). Better preparing workers with work-based learning that can channel graduates into employment and will ensure that domestic labour market demand is met with Ethiopian workers with the appropriate skill levels.
3. Promote programmes that offer apprenticeships and on-the-job training to allow low-skilled workers to develop necessary job skills needed to find employment in more specialized (semi- to high-skilled) occupations. Suitable apprenticeship programmes would be those that provide theory in combination with hands-on practice in a real work setting.
4. Support existing vocational training programmes, including those run by non-governmental organizations (NGOs) and private institutions that can support TVET graduates in each region. A regional approach may be necessary to adapt programmes to the local requirements of the different industries and local market conditions.
5. Determine how existing standards to assess and certify skills acquired through existing upskilling programmes (by TVET, NGOs, other institutions or work-based learning such as an apprenticeships) can be adapted to ensure they are recognized by the national qualifications framework and systems.
6. Explore the potential for establishing a coordination mechanism where government, the private sector, employers and training providers can discuss and develop ideas for how to provide and facilitate training programmes that are more suitable for upskilling low-skilled workers.
7. Conduct a job placement study with university and TVET students to better understand the process job seekers follow to explore job opportunities.

Promote labour market opportunities in Ethiopia, particularly in the key growth sectors such as construction, agriculture and manufacturing. These sectors are predicted to grow over the next few years, and demand for workers is expected to be high. Promoting them by connecting workers with potential employers will serve as a win-win strategy and also means Ethiopia will become less dependent on migrant workers.

1. **Promote opportunities for women to find employment within Ethiopia**. It is expected that women will continue to be employable across sectors in Ethiopia. As such, connecting women to employment opportunities within the country should be a "first-tier" option. As a corollary to promoting women in the workforce, the Ethiopian Government should be encouraged to fund childcare for workers with children.
2. **The findings strongly support the need to develop medium- and highly-skilled labour in Ethiopia**. Although there is still a demand for low-skilled labour in some sectors, there is a distinct shift towards favouring a higher-skilled labour force. Sectors of particular focus are construction, agriculture, and manufacturing, areas where prospective workers can be trained for medium- and high-skilled employment opportunities.
3. **Strengthen the formal recruitment system in Ethiopia to better link employers with potential workers.** Currently, employers rely heavily on informal modes of recruitment, including drop-ins and referrals. Relatively few employers in Ethiopia make use of formal recruitment services. Consequently, employers often do not find the right workers for the right jobs.
4. **Promote and educate workers on labour market policy.** Migrant-targeted education and pre-migration information would contribute to ensuring a safer and more beneficial work and migration experience for workers seeking employment in and outside of the country.
5. Extend support to programmes and services such as the Job Creation Commission that focus on developing essential job-seeking skills and determine how such initiatives can be made available to job seekers. Such programmes and services should include skills for finding potential job opportunities, resume writing, how to properly engage with prospective employers and job interview skills.

5.2 Gulf

1. **Promote labour market opportunities in the Middle East.** Building a labour force with stronger skills will open up more opportunities for potential migrants wanting to work in the Gulf. Compared to other countries, Ethiopia holds a relatively small share of jobs in KSA, Kuwait and UAE. In particular, construction, agriculture and a mix of other sectors are currently experiencing an undersupply of medium- and high-skilled labour.
2. **Promote job opportunities for women to work as care workers in the GCC.** Due to an ageing population and more GCC women entering the workforce, there is currently a high demand and an undersupply of medium- and high-skilled care workers who can look after elderly persons and those who are in poor health. This is another gap that can be filled by training Ethiopian workers, especially women.

3. **Develop a TVET programme with a focus on care work**. Ethiopian women in particular are often employed as domestic workers in the Gulf. The nature of domestic work means women have limited opportunities for social interaction outside of the workplace and so they face a greater risk of abuse. Therefore, implementing such a programme to bridge the skills gaps is essential in order for women to be able to explore greater opportunities in the destination country. However, as care workers, additional skills will need to be developed or formally recognized, in case of prior learning, including cooking, healthcare and language skills. Targeted training in these areas will increase the employability of potential women migrant workers and could contribute to these individuals commanding a higher wage.

4. **Strengthen bilateral agreements with KSA, Kuwait and UAE, with a focus on improving formal contracts and not allowing employers to withhold passports and other personal documents.** Currently, Ethiopian workers are vulnerable to exploitation – especially care workers in private employment. Creating and enforcing regulations with regard to the employer-employee relationship will contribute to reducing opportunities for such exploitation. Further, the bilateral agreements should not be limited to low-skilled migrant workers but should be drafted to include medium-skilled migrant workers as well. There are several civil society organizations who work on these issues in Ethiopia and could be a good source of information and partnership.

5.3 Other markets

1. **There is the potential to explore the employment of Ethiopian care workers and domestic workers in the Czech Republic. Their chances of success in finding employment are expected to be greater if they can converse in English.** The proportion of migrant workers is relatively low in the Czech Republic because there is a limited demand for low-skilled labour and many positions are filled by workers from Ukraine, the only country with a bilateral agreement with the Czech Republic. However, the number of migrant workers could potentially increase in the near future, especially in response to the challenges associated with the country's ageing population, and this should be monitored over time.

2. **The Ethiopian Government should explore opportunities for signing MoUs with South Korea.** South Korea is an advanced East Asian country with a high demand for low- and medium-skilled workers. The Korean economy has become dependent on foreign labour to maintain its productivity in key sectors covered by the Employment Permit System (EPS). However, the EPS only allows for workers from countries who have a signed MoU with South Korea. The opportunity to sign an MoU should be explored.

3. **Explore work opportunities in Asia and Europe.** Although there are skills gaps and employment opportunities in South Korea and the Czech Republic, opportunities at this point appear limited. As a result, opportunities should be explored in other countries in central Europe and Asia.

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ANNEXES

ANNEX I: Extended desk review

1.1 Lessons from the Republic of Korea (South Korea)

Until the end of the 1980s, South Korea was a country of emigration, but since that period the country has been experiencing major demographic changes. Today, it is considered a major destination for migrant workers, and the number of foreigners migrating to South Korea now exceeds the number of Koreans migrating overseas (IOM 2011).

1. Overview of the migration situation in South Korea

In 2019, there were 1.323 million foreign workers in South Korea, comprising less than 7 per cent of skilled workers (Statistics Korea 2019). Some 90 per cent of foreign workers are from Asia, mostly from China and South-East Asia, followed by 6 per cent from North America. Migrant workers of Korean-Chinese ethnicity make up some 35 per cent, while Chinese migrant workers comprise around 22 percent, followed by Vietnam (8 per cent) and Thailand (6 per cent) (Jeon 2018). The reason for the prevalence of migrants from these countries is that South Korea established a Memorandum of Understanding (MoU) with their governments as part of the Employment Permit System (EPS) (Hur et al. 2013). If irregular migrants are included, the total number of foreigners living in South Korea is thought to be more than 1.8 million people. It is predicted that by 2030 foreigners will represent 10 per cent of the total population of South Korea (Moon 2015). However, South Korea denies the right to family reunification to EPS migrant workers (UN Human Rights Council 2015).

The increase in the number of foreigners in South Korea is the result of multiple factors. First, economic growth and wage increases has created manpower shortages for low-skilled jobs needed by SMEs (Denney 2015). As a consequence, the Korean government turned to international migration to fill this gap and went through a series of employment reforms (Min 2015). Secondly, South Korea has the lowest birth rate and the fastest-ageing population profile among OECD countries (IOM 2018) and this situation is perceived by officials and researchers to be a threat to economic productivity and social stability (Moon 2015). Some projections predict a dramatic population reduction and an increase in the labour shortage due to these factors. This, coupled with the economic situation of the country, will make South Korea an increasingly attractive destination for migrant workers (IOM 2011).

Since 1990, South Korea has also faced a "bride-shortage", and Korean men, particularly in rural areas, have struggled to find women to marry. This situation has led to a rapid increase in marriage migration, facilitated by local and central governments (Seol 2018). A number of factors including a strongly entrenched patriarchal social system and Korean women prioritizing their careers over traditional gender roles has led to this demographic gap. Most marriage migrants come from China and Vietnam. These women are expected to raise children, take care of their parents-in-law and the elderly, and to integrate into Korean society. This type of immigration provides relatively easy access to permanent residency and naturalization (Moon 2015). In 2016, mixed marriage represented 11 per cent of all marriages in South Korea (Renzaho 2016).

South Korea's immigration policy has strict limitations when it comes to applying for citizenship or permanent residency. South Korea adopts a restrictive approach regarding medium/highly skilled and low-skilled labour by offering incentives to the first category and subjecting the second one to restrictive measures (Jung and Oh 2013). However, if South Korea wants to grow its economy and to address labour shortages, there are few alternatives other than relying on migrant workers. Additionally, any solution also requires modifications to South Korea's immigration policies and should include citizenship and permanent residency (Renzaho 2016). This idea seems to be understood in part by the Korean Government. In its Basic Plan on Low Birth Rate and Aging Society, migration is a key element for addressing the aforementioned structural problems. The plan for 2016–2022 discusses the need to work on social integration to utilize foreign workers, to attract skilled foreign workers in specific sectors (such as engineering), to improve the social acceptability of a multi-cultural society, and to build comprehensive foreign worker management systems to prepare for future labour shortages (Lee 2019). Meanwhile, South Korea is more likely to be focusing on low-skilled workers to attenuate manpower shortages in its industries (Jeon 2018).

2. The EPS System and key sectors for migrant workers in South Korea

Around 80 per cent of South Korea's population recognize the need for migrant workers to fill certain labour market niches and migrant workers' positive contribution to the economy (Baruah and Tunon 2012). Such positive recognition may explain why only settled immigrants with permanent residency can freely choose and engage in a profession of their choice (Seol 2012). Regarding the global situation of foreign workers in the South Korean labour market, Korean-Chinese ethnic workers occupy an elevated position in the hierarchy of foreign nationals. Korean-Chinese migrants hold a different type of visa (H-2 visa) to EPS workers and are allowed to work in other sectors (service sector) as well as in the same sectors as migrants with E-9 visa, which creates differences in the overall employment statistics of migrant workers (Cho et al. 2018). If workers with Korean ethnic roots are included, the numbers show that migrant workers are mostly employed in low-skilled jobs in the manufacturing sector (39 per cent), with 32 per cent being employed in elementary occupations (agriculture, fisheries, and construction) and 13 per cent in the service sector.

Half of all male migrant workers are employed in the manufacturing sector, while 38 per cent of female migrant workers are in occupations such as agriculture and service jobs. Almost half (49 per cent) of all migrant workers earn US$860 to US$1,700 per month on average, and the majority of them work in low-skilled jobs. Women migrant workers usually earn less than men because of the different sectors of activity (Jeon 2018). It is important to note that South Korea has not ratified the ILO Migrant Workers (Supplementary Provisions) Convention, 1975 (No. 143) (ILO 2020)).[16]

Since 2004, the EPS system has become the main system for recruiting low-skilled workers from the 15 countries with which the Korean Government has signed MoUs (Renzaho 2016). Through the EPS, companies with less than 300 employees can employ foreign workers from one of the 15 countries under an E-9 visa. The use of the EPS as a means of resolving long-term and structural labour issues has been criticized (Min 2015). The EPS was designed as a way to stop corruption and human rights abuses related to the employment of migrant workers in the region, but it has also shown some weaknesses. The Korean Ministry of Employment and Labour (MOEL) and Ministry of Justice (MoJ) are in charge of the EPS system. The former is in charge of the employment process and management of foreign workers according to the Act on the Employment, etc. of Foreign Workers while the latter is in charge of immigration rules and issuing of visas. The institutions and agencies working for employment and entry are subject to the supervision of the Ministry of Employment and Labour (MOEL) and Ministry of Justice (MoJ). The EPS process can be divided into four phases: first, pre-job matching; second, pre-departure; third, in South Korea; and last, upon return to the home country (Cho et al. 2018). The government of a sending country, MOEL and MOJ are involved in this process.[17] All migrant workers employed under the EPS qualify for insurance coverage even though pension schemes are not compulsory (Min 2015).

Every year, South Korea determines a quota for the number of migrant workers that can be accepted from each country in each key sector (manufacturing, construction, services, agriculture and fisheries). Over 80 per cent of workers are involved in the manufacturing sectors, while construction and service sectors have the smallest share of EPS workers. The share of workers in agriculture and fisheries sectors has been increasing over the last few years, as South Korea has become dependent on low-cost foreign workers. The small percentage of EPS workers in the service sector is because ethnic Korean descendants who

[16] The reason South Korea has not ratified the ILO Convention is that South Korean nationals are obligated to do military service or public social work as a substitution for military service. This service is recognized by ILO as a form of forced labour.

[17] The process of the EPS is as follows: Decision on major policies including quotas and sending countries →signing of MOU with the sending workforce (South Korean Government ↔sending country government) →making jobseekers list (sending country government ↔ South Korean Government) →selection of foreign workers & issuance of employment permit (employers ↔MOEL) →signing of labor contract (employer ↔foreign worker) →issuance of certificate for confirmation of visa issuance (employer↔MOJ) →entry of foreign workers (employer ↔sending country) →employment management of foreign workers (MOEL) and sojourn management of foreign workers (MOJ). More information is available on the South Korean Government website, https://www.eps.go.kr/ph/index.html.

hold a H2 visa are allowed to work in these sectors. Since the beginning of the EPS, four countries (Vietnam, Thailand, Indonesia and the Philippines) have accounted for more than half of all workers. About two thirds of EPS workers are aged 20 to 29, and most of them are young males, with the share of female workers being under 10 per cent. Cambodia and Thailand send the most female workers, with shares above 15 per cent (Cho et al. 2018).

Quotas are based on labour shortages, the unemployment rate and macroeconomic considerations in each sector. However, quotas are not equally distributed and usually granted to only a few Asian countries with which South Korea has good commercial relations or wants to strengthen collaboration (Jung and Oh 2013). The number of workers who overstay is closely monitored and countries can be penalized by lowering the quota. During the job-matching process, employers can express their preference for certain worker characteristics and usually mark their preference for nationality. Meanwhile, education and Korean language skills are not dominant criteria, which is surprising given the emphasis put on Korean language proficiency by the EPS (Cho et al. 2018). Nevertheless, foreign workers who want to work in South Korea have to meet these specific criteria. (https://www.eps.go.kr/ph/index.html)

Each of the sending countries organizes pre-departure training for the workers, and they can only travel to South Korea once they have completed the training to a satisfactory standard. Under the EPS, migrant workers are granted an E-9 visa and can work in South Korea for three years with the possibility of two contract extensions for a further period of up to four years and ten months. After this time, migrant workers have to return to their home country. Those who have worked at least one year for the same employer may be rehired after 3 months without having to go through the application process again. Under South Korea's "Happy Return Programme", the Government in collaboration with the Human Resource Development Service of Korea, provides professional training (Korean language, vehicle maintenance, beauty care, and so on) to migrant workers to help them resettle in their home countries (Min 2015).

The EPS programme is facing criticism from Amnesty International, the UN Human Rights Council and the United States of America Department of State, who have raised concerns saying the EPS contributes to human and labour rights violations. One of the main criticisms relates to the fact that employers can terminate or refuse to renew a migrant's contract with limited justification (UN Human Rights Council 2015). However, migrant workers must obtain their employer's consent in order to switch to a new job, the exceptions being if employers intend to terminate the employment contract or to refuse renewal of employment contract after expiration, or workers can prove abuse or exploitative working conditions (Cho et al. 2018). Or under the following circumstances; If their employer intends to terminate their employment contract during the contract period, or intends to refuse renewal of their employment contract after its expiration, on a justifiable ground; if they are unable to continue to work in the business or place of business on grounds not attributable to them,

such as temporary shutdown, closure of business, cancellation of the employment permit, limitation on the employment, provision of a dormitory in violation of dormitory condition prescribed, or his/her employer's violation of terms and conditions of employment or unfair treatment; or any other cause or event prescribed by Presidential Decree occurs. Even if the worker obtains permission, they have to find a new position within three months or face deportation. Furthermore, contract extensions after three years are only open to migrants who have never changed job, except where they have been unable to work in their workplace due to shutdown or closure of business, cancellation of their employment permit by the employer, employer violation of conditions of employment or unfair treatment. Therefore, the EPS makes it difficult for migrant workers to challenge abuses (Amnesty International 2014). South Korea maintains 36 Support Centres in the country where EPS workers can lodge complaints (Min 2015), but according to Amnesty International most migrant workers say they do not receive proper assistance from officials and, in most cases, they are discouraged from pressing charges even when abuses occur. As a result, employers rarely face sanctions (Amnesty International 2014).

3. Barriers and attitudes towards migrants in South Korea

The US Department of State considers South Korea to be a "Tier 1 country" because it complies with the minimum standards for the elimination of human trafficking. However, they point to other human rights issues within South Korea such as corruption, restrictions on freedom of assembly, discrimination, sexual and domestic violence, and trafficking in persons (US Department of State 2017).

Amnesty International and the National Human Rights Commission (NHRCK 2014) emphasised two sectors (agriculture and fisheries) where migrant workers are subjected to poor working conditions that can be regarded as forced labour. Migrant workers in those two sectors are on average forced to work beyond their contracted hours, do not receive any overtime compensation, receive late payment or no payment or are subject to illegal subcontracts. They face sexual abuse, threats, harassment, violence, poor living conditions, and insufficient food provisions (Amnesty International 2018). These migrant workers experience worse conditions than those in other sectors because article 63 of the Labour Standards Act excludes them from protection concerning working hours, breaks and paid leave days. Moreover, as many migrants work in isolated areas it is difficult for them to report abuses (UN Human Rights Council 2015).

Migrant women with an E-6 visa and working as an "art entertainer or singer" outside of the EPS system can be at risk of sex trafficking. Every year, more than 4,000 foreign women – mostly from the Philippines – are forced to engage in sex work in entertainment establishments concentrated near US military bases. At such venues, they are subjected to threats of deportation if they try to escape or seek assistance from the authorities. They also face violence, passport confiscation and poor health conditions. If they escape, they will be reported by the employer and thus considered an irregular worker, unauthorized

stays resulting in fines. The only option for a woman in that position is to apply for a G-visa and to press charges against her employer. But even if she is recognized as a victim, the woman will be deported when her visa expires (Shin 2015) and can be detained during investigations (US Department of State 2017).

Women who enter South Korea under promises of marriage with a Korean man also risk trafficking and other abuses from their husband and in-laws, in addition to discrimination (IOM 2011). Violence against spouses is a serious problem in South Korea: one in five women has experienced physical abuse by their husband or in-laws (Renzaho 2016). In recent years, South Korea has increased the number of trafficking investigations and prosecutions to prevent trafficking among entertainment visa holders (US Department of State 2017) but convicted traffickers usually receive very limited penalties (Freedom House 2017). Recently, the Government has established support centres for foreign-born spouses and victims of sex trafficking (US Department of State 2017).

In South Korea, the social integration of immigrants (Freedom House 2017) and discrimination remain significant problems (Human Rights Watch 2018). Migration has exacerbated social and cultural tensions in a country lacking cultural diversity and exhibiting social anxiety regarding migrant workers (Hur et al. 2013). Children of foreign brides, like their mothers before them, face discrimination which leads as many as 80 per cent to drop out of school. A third of Koreans consider mixed-race families and coexistence of diverse races as a threat to the country's cohesion. The younger generation tends to be more open-minded, but the majority of Koreans still believe the "Korean bloodline" is an important component of Korean identity. This attitude towards foreigners explains why, in 2012, the anti-discrimination law faced vigorous opposition (Moon 2015).

1.2 Lessons from the Czech Republic

Introduction

In 2018, Europe hosted about 22.3 million non-EU citizens, equal to about 4.4 per cent of its population (Eurostat 2017). In contrast to other Western European countries, the Czech Republic is not perceived by migrant workers as an attractive country for migration (Libor, Procházka and Stojar 2018).

Since 1990 and the development of the Czech economy outside of the former Soviet Union, the country has been ageing and faces a demographic decline. Notwithstanding, the country wavers between fears of migration pressures and the need to secure skilled workers for the current and future labour market (Libor, Procházka and Stojar 2018). Unemployment continues to be a problem in less prosperous parts of the country, which has resulted in some regions experiencing considerable shortages of labour, especially low-skilled labour: this has largely been solved by employing migrant workers (Čižinský, Dubová and Hurrle 2014). Many migrant workers and women in particular experience poor working conditions

and work de-qualification, in which they downgrade from more prestigious jobs in their country of origin (Redlová 2013).

In 2018, the total population of the Czech Republic was 10,626,430 (CZSO 2019) and almost 95 per cent of the population declared themselves as Czech. However, since 1990 the number of foreigners living in the country has been constantly increasing. According to the Czech Statistical Office (CZSO), in 2018 there were 658,519 foreigners (5.1 per cent of the total population) living in the Czech Republic. Of this figure, 36 per cent are women. Consequently, the Czech Republic has one of the lowest rate of foreigners in the EU. A total of 568,676 of foreigners in the country are registered at the labour office and 89,843 (14 per cent) engage in business activities on the basis of a trade licence (CZSO 2019). Just under half (44 per cent) of the overall number of registered foreigners living in the Czech Republic hold permanent residency (Misove 2017).

1. Overview of the migration situation in the Czech Republic

In terms of irregular migration in the Czech Republic, the estimated numbers vary from 17,000 to more than 300,000. Some researchers consider that the number of irregular migrants in the Czech Republic is likely to be equal to the number of legally registered immigrants (Drbohlav et al. 2009). But a lack of studies on irregular migration in the Czech Republic makes it difficult to evaluate the situation (Krizkova and Ouředníček 2020). Irregular migrants can be divided into three categories (Libor, Procházka and Stojar 2018). First, there are transit migrants (mainly from Syria, Afghanistan and Iraq) who move through the Czech Republic to enter into Germany. Second, there are those migrants that enter through regular channels but subsequently overstay the permitted period of residence, such as 32 per cent of migrants from Ukraine who entered legally (CZSO 2019). Third, there are foreigners detected when illegally crossing the external Schengen borders. Of the 1,701 asylum applications lodged in 2018, mostly from Ukrainian citizens, only 47 applications were accepted (Czech statistical office, 2019).

The age structure shows that more than half of all immigrants fell within the age category of 29 to 49 years, while the share of children under 15 years of age and persons over 65 years are the lowest. In 2018, the prevailing reasons for entering the Czech Republic were employment (more than 50 per cent) and family reunification (25 per cent). For women, the situation is different because most of them come for family reunification (38 per cent) compared to employment (35 per cent) (CZSO 2019). Those results show that labour migration is tied to long-term immigration (Drbohlav et al. 2009).

In term of legal migration, people from the following countries are the most represented: Ukraine (131,302; 23 per cent), Slovakia (116,817; 21 per cent), Vietnam (61,907; 11 per cent) and Russia (38,033; 7 per cent) . The 35 per cent left represent people coming from various countries including Moldavia, China, Mongolia, Kazakhstan and Belarus. The highest concentration of foreigners (about one third) is in the capital city of Prague and its

neighbouring districts (CZSO 2019). Migration from Ukraine is not likely to reduce due to the bilateral agreement developed in 2015 by the Czech Ministry of Foreign Affairs, which allows Czech employers to hire their workers directly from Ukraine but also facilitates the procedures for Ukrainian workers to obtain a work permit (Libor, Procházka and Stojar 2018). In 2018, similar programmes were launched for workers from Mongolia and the Philippines.[18]

2. Key economic sectors in the Czech Republic

Since the end of the 1990s, the Czech Republic's economy has been growing. In 2017 alone, the Czech economy grew 4.6 per cent,[19] but labour shortages could emerge in the future. The Czech economy can be divided into three main sectors: agriculture, manufacturing and services. The service sector, including tourism,[20] employs 57 per cent of the Czech workforce, followed by manufacturing (36 per cent) and agriculture (7 per cent).[21] As the main industrial sectors such as the automotive industry have experienced an economic downturn, the Czech economy has been diversifying towards a more high-tech, services-based, knowledge economy,[22] and shifting towards higher-skilled employment.[23] Sectors such as manufacturing, IT, and business services are expanding and the demand for high-skilled workers has been increasing, while the demand for low- and medium-skilled workers is declining.[24] In 2016, the employment rate among low-skilled workers was low at 44 per cent, representing only 5 per cent of the Czech workforce.[25] This compares to more than 80 per cent among the two other skill categories.[26] However, even if the country has one of the lowest (3 per cent) unemployment rates in the OECD, there is a skills mismatch and the current labour force is not adequately suited to demand in sectors such as health and IT.[27] Czech employers have reported labour shortages as the main obstacle to expanding their operations.[28] Skilled foreign workers must be attracted to the Czech Republic to compensate for labour shortages.

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18 OECD, *OECD Economic Survey: Czech Republic.* 2018. http://www.oecd.org/economy/surveys/Czech-Republic-2018-OECD-economic-survey-overview.pdf

19 *Ibid*.

20 SANTANDER, *Czech Republic: Economic and Political Outline.* 2020. https://santandertrade.com/en/portal/analyse-markets/czech-republic/economic-political-outline

21 MÜNICH.D, *A Tumultuous Decade: Employment Outcomes of Immigrants in the Czech Republic*. 2014. https://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---migrant/documents/publication/wcms_313707.pdf

22 OECD, *OECD Economic Survey: Czech Republic.* 2018.

23 *Ibid.*

24 Ibid.

25 D. MÜNICH, *A Tumultuous Decade: Employment Outcomes of Immigrants in the Czech Republic*. 2014.

26 EUROPEAN COMMISSION, *Country Report Czech Republic 2018.* 2018.

27 OECD, *OECD Economic Survey: Czech Republic.* 2018.

28 EUROPEAN COMMISSION, *Country Report Czech Republic 2018,* 2018.

In 2013, 14 per cent of employers reported difficulties with recruitment,[29] with the manufacturing and IT sectors suffering the most from the shortage of labour.[30] The highest proportion of vacancies arose within low-skilled occupations (administrative and support service activities, construction and manufacturing sectors) (see table 9, below). For those occupations, the main issue was a low level of interest among potential workers in taking up these positions due to low salaries and difficult working conditions or insufficient experience of workers. This shortage led, in some cases, to the displacement of those occupations by new technologies or by hiring workers under poor working conditions. [31] For high-skilled occupations, vacancies arise in healthcare and ICT sectors due to a lack of candidates with the right qualifications.[32] The following occupations are in shortage (engineers and technical professionals, nurses, medical doctors or health professionals, ICT professionals, and teachers) and in surplus (workers in gastronomy or hospitality sectors, project managers, clerks, architects, and designers).[33] Employment in construction and primary sectors is estimated to continue to fall.[34] For the 2018–2030 period, demand for the following occupations is expected to grow (associate professional, professional, managers, service and sales workers) and the following to diminish (trade workers, operator and assemblers, farm and elementary workers).[35] According to CEDEFOP,[36] the main skills required by employers are core skills (adaptation, computer literacy, communication and language skills). Some of the gaps that exist are the result of not utilizing available women's skills, even though women represent the majority of graduates in mathematics, natural sciences (59.6 per cent) and health studies (83.5 per cent). In 2016, one in three women graduates in those fields was not employed.[37]

[29] EUROPEAN COMMISSION, *Bottleneck Vacancies in the Czech Republic*, 2014. https://ec.europa.eu/social/BlobServlet?docId=12647&langId=en

[30] HAYS, *Salary Guide 2019: Czech Republic Labour Market Trends. The 2019 HAYS Salary Guide*, 2020. https://www.hays.cz/documents/63246/0/SG2019_CZ_en.pdf

[31] EUROPEAN COMMISSION, *Bottleneck Vacancies in the Czech Republic*, 2014.

[32] *Ibid.*

[33] CEDEFOP, *Czech Republic: Mismatch priority occupations*. 2016. https://skillspanorama.cedefop.europa.eu/en/analytical_highlights/czech-republic-mismatch-priority-occupations#_summary

[34] CEDEFOP, *Czech Republic: Skills forecasts up to 2025,* 2015. https://www.cedefop.europa.eu/en/publications-and-resources/country-reports/czech-republic-skills-forecasts-2025

[35] CEDEFOP, *Czechia,* 2019. https://skillspanorama.cedefop.europa.eu/en/countries/czechia

[36] CEDEFOP, *Skills-Ovate: Skills Online Vacancy Analysis Tool for Europe,* 2020. https://www.cedefop.europa.eu/en/data-visualisations/skills-online-vacancies/skills-occupations

[37] OECD, *OECD Economic Survey: Czech Republic.* 2018.

Table 9. Ten most in-demand professions in the Czech labour market (2018)[38]

Number 1	Auxiliary workers in mining, construction, and manufacturing
Number 2	Assembly workers of products and equipment
Number 3	Metalworkers, engineering workers
Number 4	Drivers and operators of mobile devices
Number 5	Fixed-machine and equipment operators
Number 6	Craftsmen and qualified construction workers
Number 7	Personal service workers
Number 8	Cleaners and helpers
Number 9	Food processing, wood-working, and garment workers
Number 10	Sales workers

Notes: The demand for these professions represents 257,000 job vacancies.
Source: Ministry of Labour and Social Affairs of the Czech Republic*"Nabídka a poptávka na trhu práce"*

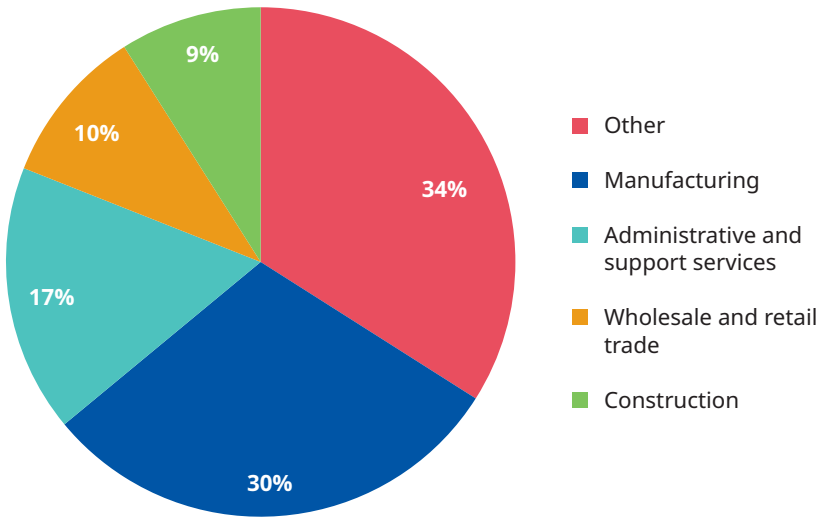
Labour migrants situation in the Czech Republic

With one of the lowest unemployment rates in Europe, foreign workers – and especially low-skilled workers – are essential to the Czech economy (Ferrero-Turrión 2018) and this explains why most of the jobs for migrant workers are in low-skilled or unqualified jobs. Of all migrant employee contracts registered at labour offices in 2017, 48 per cent were in medium-skilled occupations, 31 per cent in low-skilled occupations, and 21 per cent in high-skilled occupations.[39] Migrant workers in the Czech Republic are predominantly employed in either manufacturing or in "other" sectors (figure 30, below). Migrants from the Ukraine and Slovakia in particular are generally employed in short-term, low-skilled jobs in sectors such as construction (60 per cent of Ukrainian men), manufacturing, forestry and other unskilled jobs. Workers from Vietnam mostly work in retail trade (80 per cent), manufacturing and construction, with most of them owning a trade licence (CZSO 2020). The main reasons for the significant presence of Vietnamese workers in the retail business trade are language and cultural barriers, and easier access to entrepreneurship than employee positions (Drbohlav et al. 2009).

[38] MIGRATION POLICY INSTITUTE, *Migration and Integration in Czechia: Policy Advances and the Hand Brake of Populism,* 2019. https://www.migrationpolicy.org/article/migration-and-integration-czechia-policy-advances-and-hand-brake-populism

[39] *Ibid.*

Figure 30. Migrant Employment by Sector in the Czech Republic (2017)[40]



Source: CZSO, "Number of registrations of foreigners at labour offices by CZ-NACE section as at 31 December 2017 "

There are few quantitative studies on migration in the Czech Republic. Therefore, the conclusion that can be drawn from the following data can, with caution, be extended to other groups of migrants in the Czech Republic. The country has become a destination for migrant domestic workers mainly because new generations of Czech women choose to pursue work careers instead of filling traditional labour roles within the home. Moreover, the transforming economy has impacted on aspects of social welfare such as state-run childcare (Redlová 2013). Subsequently, due to the ageing Czech population and difficulty for the state in providing the necessary age-care services, the demand for migrant domestic workers is expected to grow in the coming years. Researchers consider such immigration to be positive, as it complements the services provided by the public sector and reduces costs that would otherwise have to be covered by the State (Ezzeddine and Semerák 2015).

According to NGO social workers, 50 per cent of female migrant workers have been employed in some type of domestic work during their stay in the Czech Republic at least once (Redlová 2013). This raises questions as to how accessible the labour market is for migrant women outside of domestic worker positions (Čižinský, Dubová and Hurrle 2014). Studies show that migrant women working as domestic workers mainly do cleaning and caring for children rather than taking care of the elderly and the sick (Ezzeddine and Semerák 2015). Live-in nannies hired by agencies are mostly from the Philippines and hired on a standard employment contract: this is in contrast to many other migrant domestic workers who do not have an employment contract. Such agencies provide minimum information to migrants, the work being presented as an eight-hour job as stipulated by law. In practice, however, the work involved is nearly always a 24-hour service. Migrant women in domestic

[40] *Ibid.*

worker roles usually decide to come to the Czech Republic on their own (47.6 per cent) or after consultations with family members (41 per cent). None of them, according to recent studies, were forced to come to the Czech Republic. The main factors compelling these migrants to leave their homes include better financial conditions and the presence of family members and friends (Ezzeddine and Semerák 2015). For migrant women, obtaining permanent residency is a major milestone, because it allows them to bring their children to the Czech Republic (Redlová 2013). Furthermore, an undetermined number of migrant workers are working irregularly in the so-called shadow economy, without work permits and facing hazardous and exploitative working conditions (US Department of State 2017). An uncertain number of those migrants are subjected to forced labour through debt bondage, conditions that are most common in construction, agriculture, forestry, manufacturing and domestic work. The Government's efforts to reduce forced labour have been limited (US Department of State 2016).

4. Legal barriers to labour migration

Even if there is a need to attract foreign skilled workers into Czech Republic, bringing workers from outside the EU poses several challenges, including language barriers and the absence of language courses and immigration integration policies developed by authorities; a lack of foreign degrees and qualifications recognized by Czech employers; administrative barriers and difficulty in obtaining professional licences; and current migration policies that mostly focus on attracting workers from the Ukraine and eastern Europe.[41] Those barriers are less problematic for Western migrants as they are usually more educated, have more financial resources, and receive support from employers.[42]

Czech labour migration policies are protectionist and only permit job offers to a third-country national when no applicant from the Czech Republic or another EU country is available. Nevertheless, work permits, intracompany employee transfers, trade licences and accelerated procedures can enable migrants to work under specific conditions. There are also programmes that have attempted to attract highly qualified employees from the Ukraine, Mongolia, the Philippines and Serbia. However, those programmes did not meet demand and their administrative procedures are complicated. The system is also partly disrupted by corrupt practices that perpetuate undeclared or quasi-legal work. Companies usually hire foreign, non-EU workers via recruitment agencies, which can lead to exploitation. In conclusion, and contrary to the general perception of the Czech population, labour migrants supplement rather than compete with Czech workers, who are less willing to work in low-skilled, low-paid occupations.[43]

[41] OECD, *OECD Economic Survey: Czech Republic, 2018*.

[42] MÜNICH.D, *A Tumultuous Decade: Employment Outcomes of Immigrants in the Czech Republic*, 2014.

[43] MIGRATION POLICY INSTITUTE, *Migration and Integration in Czechia: Policy Advances and the Hand Brake of Populism,* 2019.

In the Czech Republic, the Labour Code, the Employment Act and the Residence of Foreign Nationals in the Territory of the Czech Republic stipulate the conditions of employment permits. An employment permit is valid only for a specific employer and for a specific type and place of employment. It is non-transferable and it is issued for a fixed period of time (maximum two years). It can, however, be applied for more than once. Health insurance represents another problem as third-country nationals have an obligation to obtain a commercial insurance policy. Such insurance contracts have many exclusions, and different prices are paid based on the age of the foreign national. The chaotic and unregulated system of subcontracting via employment agencies has created conditions for labour exploitation and lowering safety and security standards.[44]

5. Constraints and attitude towards migrants in the Czech Republic

According to the United States of America Department of State reports on the Czech Republic, there is no information on extreme human right abuses in the country. However, the country is facing other human rights issues, such as police corruption, long detention of migrants and asylum seekers, violence against women and exploitation of migrant workers (US Department of State 2017). It should also be noted that Czech law does not criminalize the confiscation of workers' passports (US Department of State 2016). Since 2015, the number of refugees crossing Czech territory and police controls have increased (Amnesty International 2016). Consequently, the number of detained migrants also increased markedly (8,563 in 2015), mostly from Syria (2,013) and the Ukraine (1,099). UN officials expressed their concerns as to what they consider systematic violations of migrants' human rights (Global Detention Project 2016), such as the detention of migrants and refugees, who are charged $10 a day for their own detention (UN News Service 2015).

In 2012, the Ministry of Labour and Social Affairs adopted several restrictive policies towards third-country foreign nationals. As a result, the situation for migrant workers further deteriorated (Čižinský et al. 2014). The restrictive policies include new obstacles to obtaining a work permit and higher penalties for irregular work. The result of these measures was that certain categories of migrants (in particular, domestic workers) ended up in the informal economy or completely destitute, but also that some employers chose not to employ foreign nationals at all. The new rules not only brought chaos to the system, but were also extremely costly for employers (Čižinský, Dubová and Hurrle 2014).

Concurrently, the level of xenophobia in the Visegrád Group countries has always been more pronounced compared to the rest of Europe, even before the start of Europe's refugee crisis (Freedom House 2016). The Czech Republic has opposed the refugee quotas established in 2015 by the European Commission (Amnesty International 2016). The country also agreed to new measures to ensure that the Balkan route for transiting refugees remains shut (Radio

[44] SIRIUS, *Legal Barriers and Enablers: WP2 Report, 2018.* https://www.sirius-project.eu/sites/default/files/attachments/WP2_D2.2.pdf

Free Europe/Radio Liberty 2017). In 2016, the Czech Republic was the only country in the EU where the majority of the population (55 per cent) opposed a common European policy on migration. Moreover, the majority (82 per cent) of Czech Republic respondents declared having a negative opinion of immigrants coming from both within and outside the European Union (European Commission 2016). This negative opinion is particularly directed against Muslims and Africans, as they are imagined to be associated with terrorism, even if the vast majority of Czech citizens have never had any experience with migrants from the Middle East and Africa (Libor, Procházka and Stojar 2018). Indeed, the country's Muslim population represents less than 0.2 per cent of Czech Republic's population (Global Detention Project 2016). Despite this, some scholars consider that the Muslim community in the Czech Republic is well integrated and coexists peacefully with Czech people (Misove 2017).

Four out of five Czech people (80 per cent) consider a foreign labour force a threat to the employment of Czech citizens, and that the employment of foreigners should be limited to regions with high unemployment rates or in positions where no Czech applicants can be found. More than two thirds of Czechs also think that foreigners contribute to rising unemployment. However, employers generally hold positive perceptions of migrant workers – with the exception of Muslims – and usually describe migrant workers as hardworking, flexible and willing to accept overtime and tougher labour conditions (Libor, Procházka and Stojar 2018). This majority negative perception of migration can be seen in the results of the 2017 and 2018 elections in the Czech Republic (Tkaczyk 2017), marked by the success of the far-right, anti-immigration Freedom and Direct Democracy party and the victory in the Presidential race of Miloš Zeman, a candidate openly in opposition to Muslims, immigrants and EU migration quotas (Freedom House 2016).

In the Czech Republic, there is racism and structural discrimination against low-skilled migrant workers in employment (ENAR 2017). The most disadvantaged areas in the Czech Republic are primarily any regions that used to be dominated by heavy industry in northern Bohemia and northern Moravia (Čižinský, Dubová and Hurrle 2014). Past studies have revealed that an applicant with a foreign-sounding name is 75 per cent less likely to be invited for a job interview (Business & Human Rights Resource Center 2014). Moreover, anti-discrimination measures are perceived as a burden for companies, and most political parties are reluctant to tackle discrimination (Čižinský, Dubová and Hurrle 2014). The main challenges and barriers mentioned by migrant workers are language, social isolation and a lack of information due to the absence of English-speaking officials. Thus, the role of networks is crucial in such situations. For employers, the constant changing of regulations, contradictory decisions by various official institutions, corruption, and a lack of up-to-date information were mentioned as the main barriers to hiring migrant workers (Redlová 2013). Meanwhile, even the second generation of migrants with a Czech university education find it difficult to find a place in the labour market (Čižinský, Dubová and Hurrle 2014).

In 2015, the Czech State Bureau for labour inspection conducted checks in work agencies employing migrant workers. Those inspections revealed inconsistencies in work agreements, withholding of salaries, or informal payments of salary or overtime and inconsistencies in working hours (US Department of State 2017). However, nearly two thirds (63 per cent) of migrant women are satisfied with their salaries regarding the frequency of payments (most are paid once a month) (Ezzeddine and Semerák 2015). Nevertheless, the US Departement of State noticed that employers sometimes ignored standard work conditions requirements in their dealings with migrant workers (US Department of State 2017). The possibility of standing up to these practices is perceived as almost non-existent by migrant workers (ENAR 2017), and they mostly try to deal with such issues on their own (Ezzeddine and Semerák 2015). Thus, authorities have few opportunities to intervene (US Department of State 2017). Even so, problems related to personal freedom restrictions, sexual harassment and violence appear only in extreme situations (Ezzeddine and Semerák 2015).

6. Conclusion

The Czech economy has evolved since the end of 1990s, diversifying towards a more high-tech, services-based, knowledge economy and towards higher-skilled employment. Sectors such as manufacturing, IT and business services are expanding and thus the demand for highly-skilled workers has been increasing, while the demand for low- and medium-skilled workers has reduced. However, the need for high-skilled workers cannot be fulfilled by Czech workers, and employment for high-skilled workers, care workers and domestic workers is a potential opportunity to explore. The chance of success in finding employment is expected to be greater for migrants who can converse in English. The proportion of migrant workers is relatively low in the Czech Republic because there is limited demand for low-skilled labour and many positions are filled by workers from the Ukraine, one of the few countries with a bilateral agreement. However, the number of migrant workers could potentially increase in the near future, especially in response to the challenges associated with the country's ageing population.

ANNEX II: Definition of jobs and occupations

The International Standard Classification of Occupations 2008 (ISCO-08) provides a system for classifying and aggregating occupational information obtained by means of statistical censuses and surveys, as well as from administrative records.

Definitions of jobs and occupations defined in ISCO-08

- A *job* is defined as "a set of tasks and duties performed, or meant to be performed, by one person, including for an employer or in self-employment".
- *Occupation* refers to kind of work performed in a job. The concept of occupation is defined as a "set of jobs whose main tasks and duties and characterized by a high degree of similarity".
- *Skill* is defined as the ability to carry out the tasks and duties of a given job.
- *Skill level* is defined as a function of the complexity and range of tasks and duties to be performed in an occupation.

1. **Low-skilled labour** – Typically involve the performance of simple and routine physical or manual tasks. They may require the use of hand-held tools, such as shovels, or of simple electrical equipment, such as vacuum cleaners. They involve tasks such as cleaning; digging; lifting and carrying materials by hand; sorting; storing or assembling goods by hand (sometimes in the context of mechanized operations); operating non-motorized vehicles; and picking fruit and vegetables.

   Many occupations may require physical strength and/or endurance. For some jobs, basic skills in literacy and numeracy may be required. If required these skills would not be a major part of the work.

   For competent performance in some occupations, completion of primary education or the first stage of basic education may be required. A short period of on-the-job training may be required for some jobs.

   Occupations classified include office cleaners, freight handlers, garden labourers and kitchen assistants.

2. **Medium-skilled labour** – Typically involve the performance of tasks such as operating machinery and electronic equipment; driving vehicles; maintenance and repair of electrical and mechanical equipment; and manipulation, ordering and storage of information.

   For almost all occupations, the ability to read information such as safety instructions, to make written records of work completed, and to accurately perform simple arithmetical calculations is essential. Many occupations at this skills level require relatively advanced literacy and numeracy skills and good interpersonal communication skills. In some occupations, these skills are required for a major part of the work. Many occupations at this skill level require a high level of manual dexterity.

   The knowledge and skills required for competent performance in occupations at medium-skilled level are generally obtained through the completion of the first stage of the secondary education. Some occupations require the second stage of secondary education, which may include a significant component of specialized vocational education and on-the-job training. Some occupations required completion of vocation-specific education undertaken after completion of secondary education. In some cases, experience and on-the-job training may substitute for the formal education.

   Occupations classified include butchers, bus drivers, secretaries, account clerks, sewing machinists, dressmakers, shop sales assistants, police officers, hairdressers, building electricians and motor vehicles mechanies.

3. **High-skilled labour** – Typically involve the performance of complex technical and practical tasks that require an extensive body of factual, technical and procedural knowledge in a specialized field. Examples of specific tasks performed include: ensuring compliance with health, safety and related regulations; preparing detailed estimates of quantities and costs of materials and labour required for specific projects; coordinating, supervising, controlling and scheduling the activities of other workers; and performing technical functions in support of professionals.

   Occupations at this skill level generally require a high level of literacy and numeracy and well-developed interpersonal communication skills. These skills may include the ability to understand complex written materials, prepare a factual report and communicate verbally in difficult circumstances.

   The knowledge and skills required for competent performance in occupation at high-skilled skill level are usually obtained as the result of study at a higher educational institution for a period of 1-3 years following the completion of secondary occupation. In some cases, extensive relevant work experience and prolonged on-the-job training may substitute for formal education.

Occupations classified as highly-skilled include shop managers, medical laboratory technicians, legal secretaries, commercial sales representatives, diagnostic medical radiographers, computer support technicians, and broadcasting and recording technicians.

The specific jobs outlined in the tables below include those that were found to be in high demand and for which there was undersupply for both Ethiopia and the Middle East. Each job is broken down to the sub-level based on ISCO job codes.

Construction

Occupation	*Job title*	*ISCO code*	*Skill level*
Electricians	Building and Related Electricians	7411	High
	Electrical Mechanics and Fitters	7412	High
	Electrical Line Installers and Repairers	7413	High
Plumbers	Plumbers and Pipe Fitters	7126	High
Engineers	Electronics Engineers	2152	High
	Telecommunications Engineers	2153	High
	Civil Engineering Technicians	3112	High
Site managers	Construction Project Managers	1323	Medium
	Construction supervisors	3123	Medium

Manufacturing

Occupation	*Job title*	*ISCO code*	*Skill level*
Machine operators	Labelling Machine Operators	8183	Medium
	Packing Machine Operators	8183	Medium
	Wrapping Machine Operators	8183	Medium
Process operators	Assembling Labourers	9322	Medium
Mechanists and tool operators	Metal Working Machine Tool Setters and Operators	7223	Medium
	Woodworking Machine Tool Setters and Operators	7523	Medium
Quality control	Manufacturing Supervisors	3123	High
	Manufacturing Managers	1321	High
	Production and Operations Department Managers in Manufacturing	1222	High
Technicians	Process Control Technicians	3139	High

Agriculture

Occupation	*Job title*	*ISCO code*	*Skill level*
Machine Operators	Agricultural Technicians	3142	Medium
Drivers	Locomotive Engine Drivers and Related Workers	831	Medium
	Heavy Truck and Bus Drivers	833	Medium
	Mobile Plant Operators	834	Medium
Site Managers	Agricultural and Forestry Production Managers	1311	Medium
Agricultural Labour	Subsistence Crop Farmers	6310	Medium
	Field Crop and Vegetable Growers	6111	Medium
	Tree and Shrub Crop Growers	6112	Medium

Care work

Occupation	*Job title*	*ISCO code*	*Skill level*
Health Care	Health Care Assistants	5321	Medium
	Health Services Managers	1342	High
	Professional Nurses	2221	High
Aged Care	Home-Based Personal Care Workers	5322	Medium /High
	Aged Care Services Managers	1343	High
Child Care	Child Care Workers	5311	Medium

Other (mainly for Middle East)

Occupation	*Job title*	*ISCO code*	*Skill level*
Managers	Retail and Wholesale Trade Managers	1420	High
Supervisors	Manufacturing Supervisors	3122	High
	Cleaning and Housekeeping Supervisors in Offices, Hotels and Other Establishments	5151	Medium
	Shop Supervisors	5222	Medium
Sales Workers	Shopkeepers	5221	Medium
	Shop Supervisors	5222	High
	Shop Sales Assistants	5223	High
Client Information Workers	Receptionists	4226	High
Personal Services Workers	Hairdresser	5141	High
	Beauticians	5142	High

ANNEX III: Survey questionnaire

ETHIOPIA – EMPLOYER SURVEY **[March, 2020]** Version: **FINAL**

RESPONDENT Address			
Company name			
Date and time stamp			
Name of interviewer		Name of supervisor	

INFORMED CONSENT

Thank you for agreeing to talk with me today. I would like to introduce myself – I am (**NAME**) from (**ORGANISATION**).

We are conducting a study with employers and it would be very helpful if you could share information about your own experience. There are no right or wrong answers, so please give us your honest opinion. Any information collected from you will be kept strictly confidential. Your participation in the interview is entirely voluntary and you can withdraw any time.

Do you have further questions about this survey? (**MAKE CLARIFICATION AS NEEDED**)

CONFIRM UNDERSTANDING

Do you understand and give your consent to be interviewed for the study?

IF YES CONTINUE

QUOTA

Industry	*Ethiopia*
Construction	n=50
Agriculture	n=50
Manufacturing	n=50
Total	**150**

RECORD REGION (ETHIOPIA)

Addis Ababa	1
Amhara	2
Oromia	3
Tigray	4

RECORD SECTOR (ETHIOPIA)

Construction	1	CONTINUE
Agriculture	2	
Manufacturing	3	
Other	4	STOP

IF MANUFACTURING ASK

Q1 What do you manufacture?

RECORD SEX OF PERSON INTERVIEWED

Man	1
Woman	2

Q2 What is your position? **(Single)**

Business owner	1
Business manager	2
Senior manager	3
Supervisor	4
Other (**SPECIFY**)	6

Q3 How many years have you been in this position?

	Years

FUTURE LABOUR NEEDS

SHOW CARD 1

F1 From which countries do you currently employ workers? **(Multiple)**

Ethiopia	1
China	2
India	3
Somalia	4
South Sudan	5
Sudan	6
Eritrea	7
Djibouti	8
Other (**SPECIFY**)	9

F3 How many male and female workers do you currently have in total?

F4 And how many male and female migrant workers do you have?

		Male	*Female*
A	Total number of workers		
B	Total number of migrant workers		

SHOW CARD WIH SKILL EXAMPLES 2

F5a What is the skill levels of the workers you employ? **(Multiple)**

F5b Which skill level does most of your workers have? **(Single)**

	F5a	*F5b*
Low-skilled labour (general labourer)	1	1
Semi-skilled labour (equipment operator or driver)	2	2
High-skilled labour (technician, supervisor)	3	3

F6 For each skill level, would you say your need for workers will decrease or increase over in the next few years, or no change? **(Single)**

	Decrease	*No change*	*Increase*	*Don't know*
Low-skilled labour (general labourer)	1	2	3	4
Semi-skilled labour (equipment operator or driver)	1	2	3	4
High-skilled labour (technician, supervisor)	1	2	3	4

F7 For each skill level, would you say it is more difficult or easier to find workers compared to before, or no change? **(Single)**

	More difficult	*No change*	*Easier*	*Don't know*
Low-skilled labour (general labourer)	1	2	3	4
Semi-skilled labour (equipment operator or driver)	1	2	3	4
High-skilled labour (technician, supervisor)	1	2	3	4

SHOW CARD 3

F8a Which of the following jobs are more difficult to find suitable workers? **(Multiple)**

SHOW CARD 4

F8b And which jobs do you expect will be in higher demand in the future? **(Multiple)**

Construction	*F8a*	*F8b*
General labour	1	1
Electricians	2	2
Plumbers	3	3
Welders	4	4
Carpenters	5	5
Engineers	6	6
Site managers	7	7
Drivers	8	8
Other (**SPECIFY**)	9	9
Agriculture		
General labour	1	1
Machine operators	2	2
Drivers	3	3
Site managers	4	4
Other (**SPECIFY**)	5	5
Manufacturing		
Assemblers	1	1
Technicians	2	2
Process operators	3	3
Metal workers	4	4
Mechanists and tool operators	5	5
Machine operators	6	6
Painting and coating workers	7	7
Quality control	8	8
Packers	9	9
Engineers	10	10
Welders and cutters	11	11
Woodworkers	12	12
Other (**SPECIFY**)	13	13

SKILLS REQUIREMENTS

SHOWCARD 5

S1 On average, how would you rate the functional skills of workers in the following jobs, meaning, their ability to do the task required for that job?

		Ability exceed requirements	*Meet requirements*	*Don't meet requirements*	*Not applicable*
A	**Construction**				
1	General labour	3	2	1	9
2	Electricians	3	2	1	9
3	Plumbers	3	2	1	9
4	Welders	3	2	1	9
5	Carpenters	3	2	1	9
6	Engineers	3	2	1	9
7	Site managers	3	2	1	9
8	Drivers	3	2	1	9
9	Language skills	3	2	1	9
10	Ability to listen and follow instruction	3	2	1	9
11	Other, as mentioned earlier	3	2	1	9
B	**Agriculture**				
1	General labour	3	2	1	9
2	Machine operators	3	2	1	9
3	Drivers	3	2	1	9
4	Site managers	3	2	1	9
5	Language skills	3	2	1	9
6	Ability to listen and follow instruction	3	2	1	9
7	Other, as mentioned earlier	3	2	1	9
C	**Manufacturing**				
1	Assemblers	3	2	1	9
2	Technicians	3	2	1	9
3	Process operators	3	2	1	9
4	Metal workers	3	2	1	9
5	Mechanists and tool operators	3	2	1	9
6	Machine operators	3	2	1	9
7	Painting and coating workers	3	2	1	9
8	Quality control	3	2	1	9
9	Packers	3	2	1	9
10	Engineers	3	2	1	9
11	Welders and cutters	3	2	1	9
12	Woodworkers	3	2	1	9
13	Language skills	3	2	1	9
14	Ability to listen and follow instruction	3	2	1	9
15	Other, as mentioned earlier	3	2	1	9

SHOWCARD 6

S2 For each skill, will needs for that skill decrease or increase over in the next few years, or no change? **(Single)**

		Decrease	*No change*	*Increase*	*Don't know*
A	**Construction**				
1	General labour	1	2	3	9
2	Electricians	1	2	3	9
3	Plumbers	1	2	3	9
4	Welders	1	2	3	9
5	Carpenters	1	2	3	9
6	Engineers	1	2	3	9
7	Site managers	1	2	3	9
8	Drivers	1	2	3	9
9	Language skills	1	2	3	9
10	Ability to listen and follow instruction	1	2	3	9
11	Other, as mentioned earlier	1	2	3	9
B	**Agriculture**				
1	General labour	1	2	3	9
2	Machine operators	1	2	3	9
3	Drivers	1	2	3	9
4	Site managers	1	2	3	9
5	Language skills	1	2	3	9
6	Ability to listen and follow instruction	1	2	3	9
7	Other, as mentioned earlier	1	2	3	9
C	**Manufacturing**				
1	Assemblers	1	2	3	9
2	Technicians	1	2	3	9
3	Process operators	1	2	3	9
4	Metal workers	1	2	3	9
5	Mechanists and tool operators	1	2	3	9
6	Machine operators	1	2	3	9
7	Painting and coating workers	1	2	3	9
8	Quality control	1	2	3	9
9	Packers	1	2	3	9
10	Engineers	1	2	3	9
11	Welders and cutters	1	2	3	9
12	Woodworkers	1	2	3	9
13	Language skills	1	2	3	9
14	Ability to listen and follow instruction	1	2	3	9
15	Other, as mentioned earlier	1	2	3	9

RECRUITMENT AND SKILL REQUIREMENTS

SHOW CARD 7

R1 From where do you source information about workers? **(Multiple)**

In-house human resource department	1
Individual recruitment agents or brokers	2
Recruitment firms	3
Referrals from other workers	4
Workers come directly to us (drop in)	5
Other (SPECIFY)	6

SHOW CARD 8

R2a How is recruitment done for male workers? **(Multiple)**

SHOW CARD 9

R2b How is recruitment done for female workers? **(Multiple)**

Direct recruitment	1
Through individual recruitment agents or brokers	2
Through recruitment firms	3
Other (**SPECIFY**)	4

SHOW CARD 10

R3 When hiring workers, which of the following selection criteria is taken into account? **(Multiple)**

Skills	1
Language	2
Experience	3
Nationality	4
Gender	5
Age	6
Time taken for recruitment	7
Others	8

R4 How many workers do a job skills test before they start working here?

All	1
Most	2
Some	3
None	4

R5 To what extent do the workers you employ match your requirements?

All are OK	1
Most are OK	2
Only some are OK	3
Most are not OK	4

SHOW CARD 11

R6 What are the biggest challenges when recruiting workers? **(Select 3)**

Finding enough workers	1
Finding workers with the right skills	2
Finding reliable recruitment agents	3
Cost of recruitment	4
Time taken for recruitment	5
Workers don't stay long enough	6
Government regulation	7
Administration around recruitment	8
Language issues	9
Workers' ability to adapt	10
Other (**SPECIFY**)	11

R7 Are workers issued with a written employment contract before they start employment?

Always	1
Most of the time	2
Sometimes	3
Rarely or never	4

R11 Does your company conduct an orientation program for new workers?

Always	1
Most of the time	2
Sometimes	3
Seldom or never	4

SHOW CARD 12

R12 Which of the following does the orientation program include**? (Multiple)**

Working hours	1
Payment of wages	2
Overtime payments	3
Leave entitlements	4
Health and safety rules	5
Tour of work site	6
Information on local culture	7
Others	8

SHOWCARD 13

R14 What job entitlements are provided to workers?

Minimum wage	1
Overtime pay	2
Annual leave or paid holidays	3
Health insurance	4
Ability to join a union	5
Sick leave	6
One day off per week	7
Maternity leave	8
Other (**SPECIFY**)	9
None	10

R15 Do you provide job training to workers?

Always	1
Most of the time	2
Sometimes	3
Seldom or never	4

R16 What type of training?

On-the-Job training	1
Coaching	2
Formal training courses by training provider	3
Other (**SPECIFY**)	4

R17 Do you have a complaint handling mechanism for employees?

Yes	1
No	2

R19 How often do workers want to change employer? **(Single)**

Never	1
Very seldom	2
Sometimes	3
Quite often	4

CONTACT INFORMATION

X1 In case I have missed anything and need to contact you, may I have your name and your phone number that I can reach you on? **DO A MISSED CALL TO CHECK**

Name
Phone

MIDDLE EAST – EMPLOYER SURVEY **[March, 2020]** Version: **FINAL**

TYPE OF INTERVIEW	**Phone or Face to Face**		
RESPONDENT Address			
Company name			
Date and time stamp			
Name of interviewer		Name of supervisor	

INFORMED CONSENT

Thank you for agreeing to talk with me today. I would like to introduce myself – I am (**NAME**) from (**ORGANISATION**).

We are conducting a study with employers and it would be very helpful if you could share information about your own experience. There are no right or wrong answers, so please give us your honest opinion. Any information collected from you will be kept strictly confidential. Your participation in the interview is entirely voluntary and you can withdraw any time.

Do you have further questions about this survey? (**MAKE CLARIFICATION AS NEEDED**)

CONFIRM UNDERSTANDING

Do you understand and give your consent to be interviewed for the study? **IF YES CONTINUE**

QUOTA

Industry	*KSA*	*Kuwait*	*UAE*
Construction	n=40	n=40	n=40
Agriculture/Fishing	n=40	-	-
Care workers	n=40	n=40	n=40
Other	-	n=40	n=40
Total	**120**	**120**	**120**

RECORD COUNTRY

Saudi Arabia	1	**GO TO RECORD PROVINCE**
Kuwait	2	
UAE	3	

RECORD PROVINCE (MIDDLE EAST)

Riyadh	1
Jeddah	2
Kuwait City	3
Dubai	4
Sharjah	5

RECORD SECTOR (MIDDLE EAST)

Construction	1	**ASK Q3**
Agriculture/Fishing	2	
Care worker	3	**ASK Q4**
Retail	4	**ASK Q3**
Other (SPECIFY)	5	

RECORD SEX OF PERSON INTERVIEWED

Man	1
Woman	2

Q2 What is your position? **(Single)**

Business owner	1
Business manager	2
Senior manager	3
Supervisor	4
Private employer (care workers)	5
Other (SPECIFY)	6

Q3 How many years have you been in this position?

	Years

Q4 How many years have you employed your care worker?

	Years

FUTURE LABOUR NEEDS

SHOW CARD 1

F1 From which countries do you currently employ migrant workers? **(Multiple)**

Pakistan	1
India	2
Egypt	3
Yemen	4
Bangladesh	5
Philippines	6
Sri Lanka	7

Jordan	8
Indonesia	9
Syria	10
Ethiopia	11
Other (**SPECIFY**)	12

F2 Have you ever had applications or interest from migrant workers from Ethiopia in the past 12 months?

Yes	1
No	2

F3 How many male and female workers do you currently have in total?

F4 And how many male and female migrant workers do you have?

		Male	*Female*
A	Total number of workers		
B	Total number of migrant workers		

SHOW CARD WIH SKILL EXAMPLES 2

F5a What is the skill levels of the workers you employ? **(Multiple)**

F5b Which skill level does most of your workers have? **(Single)**

	F5a	*F5b*
Low-skilled labour (general labourer)	1	1
Semi-skilled labour (equipment operator or driver)	2	2
High-skilled labour (technician, supervisor)	3	3

F6 For each skill level, would you say your need for workers will decrease or increase over in the next few years, or no change? **(Single)**

	Decrease	*No change*	*Increase*	*Don't know*
Low-skilled labour (general labourer)	1	2	3	4
Semi-skilled labour (equipment operator or driver)	1	2	3	4
High-skilled labour (technician, supervisor)	1	2	3	4

F7 For each skill level, would you say it is more difficult or easier to find workers compared to before, or no change? **(Single)**

	More difficult	*No change*	*Easier*	*Don't know*
Low-skilled labour (general labourer)	1	2	3	4
Semi-skilled labour (equipment operator or driver)	1	2	3	4
High-skilled labour (technician, supervisor)	1	2	3	4

SHOW CARD 3

F8a Which of the following jobs are more difficult to find suitable workers? **(Multiple)**

SHOW CARD 4

F8b And which jobs do you expect will be in higher demand in the future? **(Multiple)**

Construction	*F8a*	*F8b*
General labour	1	1
Electricians	2	2
Plumbers	3	3
Welders	4	4
Carpenters	5	5
Engineers	6	6
Site managers	7	7
Drivers	8	8
Other (**SPECIFY**)	9	9
Agriculture		
General labour	1	1
Machine operators	2	2
Drivers	3	3
Site managers	4	4
Other (**SPECIFY**)	5	5
Care workers		
Care workers looking after elderly people	1	1
Care workers for people in poor health	2	2
Other (**SPECIFY**)	3	3
Other		
General labour	1	1
Drivers	2	2
Supervisors	3	3
Other (**SPECIFY**)	4	4

SKILLS REQUIREMENTS

SHOWCARD 5

S1 On average, how would you rate the functional skills of migrant workers in the following jobs, meaning, their ability to do the task required for that job?

		Ability exceed requirements	*Meet requirements*	*Don't meet requirements*	*Not applicable*
A	**Construction**				
1	General labour	1	2	3	9
2	Electricians	1	2	3	9
3	Plumbers	1	2	3	9
4	Welders	1	2	3	9
5	Carpenters	1	2	3	9
6	Engineers	1	2	3	9
7	Site managers	1	2	3	9
8	Drivers	1	2	3	9
9	Language skills	1	2	3	9
10	Ability to listen and follow instruction	1	2	3	9
11	Other, as mentioned earlier	1	2	3	9
B	**Agriculture/Fishing**				
1	General labour	1	2	3	9
2	Machine operators	1	2	3	9
3	Drivers	1	2	3	9
4	Site managers	1	2	3	9
5	Language skills	1	2	3	9
6	Ability to listen and follow instruction	1	2	3	9
7	Other, as mentioned earlier	1	2	3	9
D	**Care workers**				
1	Looking after elderly people	1	2	3	9
2	Caring for people in poor health	1	2	3	9
3	Cooking	1	2	3	9
4	Cleaning	1	2	3	9
5	Language skills	1	2	3	9
6	Ability to listen and follow instruction	1	2	3	9
7	Other, as mentioned earlier	1	2	3	9
E	**Other**				
1	General labour	1	2	3	9
2	Drivers	1	2	3	9
3	Supervisors	1	2	3	9
4	Language skills	1	2	3	9
5	Ability to listen and follow instruction	1	2	3	9
6	Other, as mentioned earlier	1	2	3	9

SHOWCARD 6

S2 For each skill, will needs for that skill decrease or increase over in the next few years, or no change? **(Single)**

		Decrease	*No change*	*Increase*	*Don't know*
A	**Construction**				
1	General labour	1	2	3	9
2	Electricians	1	2	3	9
3	Plumbers	1	2	3	9
4	Welders	1	2	3	9
5	Carpenters	1	2	3	9
6	Engineers	1	2	3	9
7	Site managers	1	2	3	9
8	Drivers	1	2	3	9
9	Language skills	1	2	3	9
10	Ability to listen and follow instruction	1	2	3	9
11	Other, as mentioned earlier	1	2	3	9
B	**Agriculture**				
1	General labour	1	2	3	9
2	Machine operators	1	2	3	9
3	Drivers	1	2	3	9
4	Site managers	1	2	3	9
5	Language skills	1	2	3	9
6	Ability to listen and follow instruction	1	2	3	9
7	Other, as mentioned earlier	1	2	3	9
D	**Care workers**				
1	Looking after elderly people	1	2	3	9
2	Caring for people in poor health	1	2	3	9
3	Cooking	1	2	3	9
4	Cleaning	1	2	3	9
5	Language skills	1	2	3	9
6	Ability to listen and follow instruction	1	2	3	9
7	Other, as mentioned earlier	1	2	3	9
E	**Other**				
1	General labour	1	2	3	9
2	Drivers	1	2	3	9
3	Supervisors	1	2	3	9
4	Language skills	1	2	3	9
5	Ability to listen and follow instruction	1	2	3	9
6	Other, as mentioned earlier	1	2	3	9

RECRUITMENT AND SKILL REQUIREMENTS

SHOW CARD 7

R1 From where do you source information about migrant workers? **(Multiple)**

In-house human resource department	1
Individual recruitment agents or brokers	2
Recruitment firms	3
Referrals from other workers	4
Workers come directly to us (drop in)	5
Other (SPECIFY)	6

SHOW CARD 8

R2a How is recruitment done for male migrant workers? **(Multiple)**

SHOW CARD 9

R2b How is recruitment done for female migrant workers? **(Multiple)**

Direct recruitment from the source country	1
Direct recruitment from migrant workers who already arrived here	2
Through individual recruitment agents or brokers	3
Through recruitment firms	4
Other (SPECIFY)	5

SHOW CARD 10

R3 When hiring migrant workers, which of the following selection criteria is taken into account? **(Multiple)**

Skills	1
Language	2
Experience	3
Nationality	4
Gender	5
Age	6
Time taken for recruitment	7
Others	8

R4 How many migrant workers do a job skills test before they start working here?

All	1
Most	2
Some	3
None	4

R5 To what extent do the migrant workers you employ match your requirements?

All are OK	1
Most are OK	2
Only some are OK	3
Most are not OK	4

SHOW CARD 11

R6 What are the biggest challenges when recruiting migrant workers? **(Select 3)**

Finding enough workers	1
Finding workers with the right skills	2
Finding reliable recruitment agents	3
Cost of recruitment	4
Time taken for recruitment	5
Workers don't stay long enough	6
Government regulation	7
Administration around recruitment	8
Language issues	9
Workers' ability to adapt	10
Other (SPECIFY)	11

R7 Are migrant workers issued with a written employment contract before they start employment?

Always	1
Most of the time	2
Sometimes	3
Rarely or never	4

R8 Is the contract written in a language the migrant worker understands?

Always	1
Most of the time	2
Sometimes	3
Seldom or never	4

R9 Does your Company retain the travel or personal documents of the migrant workers under employment?

Always	1
Most of the time	2
Sometimes	3
Seldom or never	4

R10 Why do you retain them?

We take them to prevent them from just leaving	1
We offer to keep them safe	2
Worker ask us to keep them safe for them	3

R11 Does your company conduct an orientation program for new migrant workers?

Always	1
Most of the time	2
Sometimes	3
Seldom or never	4

SHOW CARD 12

R12 Which of the following does the orientation program include**? (Multiple)**

Working hours	1
Payment of wages	2
Overtime payments	3
Leave entitlements	4
Health and safety rules	5
Tour of work site	6
Information on local culture	7
Others	8

R13 Is the orientation held in a language the migrant worker understands?

Always	1
Most of the time	2
Sometimes	3
Seldom or never	4

SHOWCARD 13

R14 What job entitlements are provided to workers?

Minimum wage	1
Overtime pay	2
Annual leave or paid holidays	3
Health insurance	4
Ability to join a union	5
Sick leave	6
One day off per week	7
Maternity leave	8
Other (SPECIFY)	9
None	10

R15 Do you provide job training to migrant workers?

Always	1
Most of the time	2
Sometimes	3
Seldom or never	4

R16 What type of training?

On-the-Job training	1
Coaching	2
Formal training courses by training provider	3
Other (**SPECIFY**)	4

R17 Do you have a complaint handling mechanism for employees?

Yes	1
No	2

R18 If a migrant worker leaves without giving notice, would you report them to the authorities?

Yes	1
No	2

R19 How often do migrant workers want to change employer? **(Single)**

Never	1
Very seldom	2
Sometimes	3
Quite often	4

CONTACT INFORMATION

X1 In case I have missed anything and need to contact you, may I have your name and your phone number that I can reach you on? **DO A MISSED CALL TO CHECK**

Name	
Phone	

ANNEX IV: Moderator guides

(March, 2020) **Moderator Guide** **FINAL**

Respondent full name		**Location**			
Date	____ /_____ / 2020	**Time begin**		**Time ended**	

INFORMED CONSENT

Thank you for agreeing to talk with me today. I'd like to introduce myself – I am **(NAME)** from **(ORGANISATION)**

We really do appreciate you giving us your time today. We are conducting a study with employers and it would be very helpful if you could share information about your own experience. There are no right or wrong answers, so please give us your honest opinion. To save time and to be able to concentrate on what you are saying I will record the interview. Are you ok to if I turn on the recorder?

START TAPE RECORDER

No personal details will be recorded. The recording will only be used for internal processing purposes and will not be shared with any third parties. It will be deleted upon completion of the project.

Please be assured that anything you say is confidential and your participation is completely voluntary, you can withdraw at any time. Do you have further questions about this interview?

(**MAKE CLARIFICATION AS NEEDED**)

Do you understand and give your consent to be interviewed for the study? **IF YES CONTINUE**

BACKGROUND

First, I would like to understand a bit about the work you do and the organization you work for.

- How long you have been working with the current organization?
- Please tell me a bit about your role and what you do?
- How would you describe your involvement with migrant workers?

KEY GROWTH SECTORS AND OCCUPATIONS

- What is the employment situation for low-skilled, semi-skilled and skilled labour in Ethiopia?
- Construction, agriculture and manufacturing has been identified as key growth sectors for low-skilled, semi-skilled and skilled labour in Ethiopia, what is your opinion about this? And if not, what are the sectors that will require large labour force in the future?
- From where do these sectors currently source their workers?
- Are the employers satisfied by the skills available in the labour market? If not, what do you think should be done
- Within each sector, what types of jobs are experiencing increasing demand?
- What particular skills are needed in order meet the needs of employers in the future?
- What are the sectors that currently have labour shortage?
- What are the sectors that currently have labour surplus?
- What perceptions do employers have regarding Ethiopian workers versus workers from overseas?

RECRUITMENT PROCESS AND SKILLS DEVELOPMENT

- How do employers source information about low-skilled, semi-skilled and skilled workers?
- How are these workers recruited?
- From what countries are migrant workers recruited?
- What is the policy/law in regards to such recruitment?
- What are the major challenges in the recruitment process?
- To what extent are employers able to match workers skills to jobs?
- What skills training do employers provide?
- What skill set do the employers expect from the workers?
- What skills training do employers expect from TVET?

TVET ONLY

- In general, what are the proportion of students enroll and graduate from TVET program?
- How does TVET measure the results of the program and what are the expectations of the program?
- To what extent are TVET graduates are able to find jobs?
- Are there any partnerships between companies and TVET?
- To what extent do TVET graduates and companies are able to match skills/jobs trained in the program?

POLICIES, STRATEGIES AND INTERVENTIONS

- How do current bilateral agreements and MoUs support Ethiopian migrant workers seeking work in the Middle East?
- What recommendations could be made to strengthen such policies?
- To what extent is job/skills matching supported by the government?
- To what extent do potential migrant workers obtain training and pre-departure orientation?
- What are the major challenges in training workers?
- What recommendations could be made to strengthen such strategies?
- How effective are current interventions?
- What role can the government play to support future interventions?
- What other actors should be involved?
- What type of interventions could be implemented?

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