

# Labour Market Survey in KSA Skills Development Programme



Final Report: The Construction Sector  
For City & Guilds and IOM

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## Glossary

ADB	Asian Development Bank
BMET	Bangladesh Bureau of Manpower, Employment and Training
GCC	Gulf Cooperation Council
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
KSA	Kingdom of Saudi Arabia
ILO	International Labour Organization
IOM	International Organization for Migration
ITI	Industrial Training Institute
RPL	Recognition of Prior Learning
SVP	RPL Programme
TVET	Technical and Vocational Education and Training

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## 1. Key Messages

- Bangladeshi migrants must position themselves as high quality workers with a competitive advantage ahead of the anticipated decline in the use of foreign labour in the construction industry.
- Improving perceptions of Bangladeshi workers is predicated on the improvement of performance and quality, and better cultural integration.
- The provision of soft skills (cultural awareness, communication and language skills) is vital if migrant workers are to live and work effectively in KSA.
- Engagement of employers and policy makers about an RPL test is crucial to ensure take-up; strategies may include consultation over test requirements and sponsored work placements.
- Bangladeshi workers need to be made aware of the value of skills certification and encouraged to aspire to higher paid, better quality work.
- Bangladeshi consular staff in KSA need to support migrant workers in exploitative or difficult work situations, to reduce the incidence of migrant workers turning to crime or unlawful activities to pay debts.

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## 2. Executive Summary

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### 2.1 Project Overview

This project was commissioned by City & Guilds and the International Organization for Migration (IOM) to form part of their wider investigation into the development of a Recognition of Prior Learning (RPL) system for Bangladeshi workers in the Kingdom of Saudi Arabia (KSA). In KSA, RPL is widely known as 'Skills Verification Programme', which helps workers to get their skills verified for formal certification. This work is intended to complement the recent IOM report into the skills landscape in Bangladesh.<sup>1</sup>

The key research areas of this study include the challenges and opportunities in skilled construction sector employment for Bangladeshi migrant workers, with particular reference to the perceptions of migrant workers held by construction sector employers and stakeholders. The research also covered employment prospects in different trades, and employers' perceptions of the potential impact of quality assured skills development, assessment and certification. The research included a desk review, encompassing literature and data analysis, enabling the development of growth forecasts; and stakeholder interviews.

The conclusions of this study are intended to illustrate the prevailing attitudes towards Bangladeshi workers in KSA and the potential action points which may enable these workers not only to change perceptions, but also to secure better-paid, higher-quality jobs, and develop a strong competitive advantage over other nationalities.

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### 2.2 Key Findings

While the construction sector has experienced high level of growth in recent years, there is a broad consensus from employers within the sector that the demand for migrants workers may fall in coming years. There are few signs of the flow of migrant workers decreasing in the immediate future, however. Since the Saudi Government lifted the 2008 ban on migrant workers from Bangladesh, there has been a rapid increase in the numbers of Bangladeshi migrants entering the country from 4,600 in July 2016 to 52,000 in February 2017, many of whom are now working in the construction sector.

While migrants construction workers are paid less than Saudi construction workers as a rule, Bangladeshi workers are paid on average 25% less than migrant workers of other nationalities. There are a number of reasons that may be associated with the differential between Bangladeshi workers compared with other migrant workers, including the low proportion of Bangladeshi workers undertaking technical skills training in a relevant trade before migrating, as well as a general perception that Bangladeshi workers are willing to accept low-paid, unskilled roles.

#### Recruitment Approaches and Trends

While government policies aim to increase the number of Saudi workers employed in skilled trades, this has had limited impact because of the lower costs and higher productivity associated with migrant labour. Migrants workers may also be more vulnerable to exploitation: for example, evidence consistently points towards the widespread exploitation of Bangladeshi workers with limited support available from Bangladeshi mission staff. There is also evidence of some Bangladeshi workers taking up additional employment or engaging in unlawful activities to repay debts incurred in coming to Saudi Arabia, which has a direct impact on their ability to fulfil commitments to their primary jobs within the construction industry.

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<sup>1</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

Recent policy initiatives by the Saudi Government to provide standardised recruitment procedures for migrant workers through the creation of 'mega recruitment agencies' have yet to feed into the hiring practices of many employers, who prefer to use traditional recruitment agencies or informal networks. Most employers remain sceptical about the value of certification provided by employees, preferring instead to conduct their own in-house skills tests. In general, employers place greater value on prior experience than qualifications, with most advertised positions requiring a minimum of five years experience.

The ADB has identified three key priorities for improving migratory flows for Bangladeshi workers: bilateral agreements between sending and receiving countries; recognition of migrant workers' skills; and better governance of the recruitment process. Evidence from employers suggests, however, that many Bangladeshi migrant workers have not received the necessary training and skills prior to coming to Saudi Arabia, and that Bangladesh lacks the vocational testing centres common in India.

Bangladeshi migrant workers also find that many jobs are not open to them, either because they are specifically targeted at other nationalities or because they do not meet minimum criteria (e.g. speaking Arabic or English fluently). Of the six occupations within the construction industry included within our survey, only two occupations had more than half of positions open to Bangladeshi workers.

### Perceptions of Bangladeshi Workforce

In terms of qualifications and certification, only 23% of employers surveyed believed that TVET qualifications obtained in Bangladesh are fairly or very accurate in verifying worker skills. Employers also indicated that certification from Bangladesh was less likely to be well received than those of other sending nations.

Little to no impact was expected by employers from the lifting of the migrant ban in the areas of perceptions of Bangladeshi workers, their skills recognition and their salaries. In terms of employment prospects, employers felt that there would also be little to no positive impact from the lifting of the ban, with some employers pointing out that the ban had forced employers to seek alternate resources (e.g. from other nations), which they were now accustomed to using.

### Recognition of Prior Learning (RPL)

Broadly speaking, the majority of employers believe that an RPL test for Bangladeshi migrant workers would be useful or very useful to their companies; it should be noted, though, that nearly a third felt that such a test would not be useful at all or only slightly useful. Reasons for these negative perspectives of an RPL test may include the current practice of some firms conducting their own skills tests, and also concerns that such skills tests would increase the salary costs of Bangladeshi workers.

Perceived challenges in introducing an RPL programme include engaging migrant workers in institutional processes before they start working to secure a job (rather than taking job opportunities which may pay less, but be available immediately) and persuading recruitment agencies and employers of the value of the training and certification.

It is essential that a robust skills development programme is delivered in parallel with the RPL and testing regime prior to migrant worker departure; while it is out of scope for this research to define the specifics of any skills development programme required in Bangladesh, we would refer readers to the recent IOM report on 'Maximising the Potential of Labour Migration Through Skills Development and Certification' which addresses the issues in detail.<sup>2</sup>

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<sup>2</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

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## 2.3 Recommendations

Key recommendations resulting from this study include:

- Ensure that Bangladeshi workers gain a competitive advantage over migrant labour from other nations; this means changing perceptions of skills and behaviour, and also providing value for money in terms of the quality of work output.
- Focus on improving soft skills (cultural awareness, communication and language skills) alongside the development, testing and certification of vocational skills, by providing short training courses for prospective migrant workers, for example, English and/or Arabic for the workplace.
- Engage employers and policymakers in KSA about the value of an RPL test and ensure that their key skills requirements are reflected in the test contents. It may also be useful as a pilot to work with employers to secure work placements for the first cohort of Bangladeshi workers receiving the test certificates, to demonstrate their quality to the employers, and to demonstrate the value of the test to prospective migrant workers.
- Ensure that Bangladeshi migrant workers are aware of the value of an RPL test, as above, and the opportunities it may provide. Providing bursaries for some migrant workers wishing to undertake the RPL test may raise awareness of the test itself and encourage more interest.
- Work with Bangladeshi consular staff in KSA to provide a package of support for migrant workers who find themselves in exploitative or dangerous situations; this support may help to alleviate some of the pressures leading workers to participate in unlawful activities, thus improving the esteem in which they are held by employers and by Saudi society more generally.
- Engage the relevant skills development governance bodies and industry representatives from Bangladesh collaborate with the mega agencies to ensure that the skills requirements and opportunities for Bangladeshi workers are appropriate and legitimate.

## 3. Methodology

### 3.1 Project Overview

This project was commissioned by City & Guilds and the International Organization for Migration (IOM) to support in the development of an RPL programme for Bangladeshi workers in the KSA. The research aimed to provide evidence relating to the key challenges and opportunities in skilled construction sector employment for Bangladeshi migrants, and the prevailing attitudes in KSA to employing this particular workforce, in order to support the development of an RPL test.

A framework was constructed to capture the main research areas of the project, identifying key research questions and likely sources. The framework was then used as a guide to questionnaire and protocol development for the project. The key research questions for the project, agreed with City & Guilds, Geoff Carroll and IOM, are depicted in the table below:

Dimension	Key Research Question
Context and trends	What is the current picture of migrant construction workers in KSA?
	What are the current and future trends for migrant construction workers in KSA?
	What, if any, macro-environmental, social or political factors may affect future migration and occupation trends in KSA?
Recruitment	What is the current regulatory environment in KSA related to migrant workers?
	How do employers in KSA approach the recruitment of migrant workers for construction jobs?
	What, if any, signals do employers use during the recruitment process to identify migrant workers? (e.g. qualifications, industrial experience, training without certification)
	What are the future prospects for migrant labour recruitment compared to national recruitment in KSA?
	What, if any, barriers do Bangladesh migrants face to recruitment into skilled construction jobs in KSA?
Stakeholder perceptions	What is the perception of Bangladesh migrant workers among construction employers and other relevant stakeholders in KSA?
	How valuable do construction stakeholders in KSA consider TVET qualifications obtained in Bangladesh?
	How valuable do construction stakeholders in KSA consider internationally accredited qualifications to be?
	What are the attitudes among KSA construction stakeholders for the development of an RPL test for migrant workers?
	What are the perceptions among Bangladeshi construction workers of their opportunities in KSA?
Developing recommendations	What are the key considerations for the development of an RPL test for migrant workers in KSA?

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## 3.2 Desk Research

### Desk Review

The primary source for the desk review was the recently completed study of the Bangladeshi skills context by the IOM, which this research is intended to complement. Supplementary desk research was conducted to understand the construction industry in KSA and the use of foreign skilled, semi-skilled and less skilled labour. Relevant papers on Bangladesh migrant workers, together with international RPL approaches in the construction sector, were also reviewed. Information was drawn from a variety of sources including the Asian Development Bank (ADB), the ILO and relevant professional bodies, in line with the key research questions noted above.

### Data Review

Data sources were reviewed in order to determine migration and occupational trends within the construction sector, as well as job actuals (including descriptions, standards, salary levels, selection criteria). Official data sources were prioritised over other sources where possible. Key data sources comprised data published by the Bangladeshi Bureau of Manpower, Employment and Training (BMET), the International Labour Organization, the General Authority for Statistics in KSA, the Saudi Arabian Monetary Agency and the United Nation Department of Economic and Social Affairs (UN DESA). The approaches used to forecast data in the absence of official estimates are provided in more detail in the relevant sections of the report.

We also conducted a jobs scan across February and March, looking at jobs advertised in construction in Saudi Arabia with a particular focus on masons, electricians, carpenters, steel fixers, welders and plumbers. The job adverts were reviewed for salary, experience, specified nationality, information on standards and anything else of relevance to the project. Where more than one job was advertised in an advert, data was weighted according to the specified number of jobs. In total, 729 openings were reviewed. The data review and jobs scan were used to develop current data, along with forecasts, on the Saudi construction sector, Bangladeshi migrant workers and occupational trends.

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## 3.3. Primary Research

### Local Researchers

Three early career Saudi Arabian researchers were selected to deliver the interviews included in this study. All selected researchers were currently studying for, or had recently completed, a PhD qualification and had experience in conducting research interviews. They had a strong understanding of research ethics, and fluency in both English and Arabic. The use of local researchers ensured that employers were able to converse in their own language, and that the researchers had a strong understanding of the local context.

Training for the local research team included capacity building on research methods and ethics, as well as the specifics of data collection for this project. Ongoing quality assurance consisted of spot checks to assess the integrity and consistency of data, as well as a regular check-ins using WhatsApp.

### Surveys

Stakeholder mapping identified over 200 key stakeholders in the areas of industry, policy and academia; a high number of stakeholders was sought due to the anticipated complexity of engaging stakeholders in this research, the subject of which required fairly candid input. In addition to local researchers' own networks and online directories, searches were run on google, seeking construction companies listed in and around Riyadh, Jeddah and Dammam (including Khobar). Construction related conferences, major projects and online fora were identified, and any Saudi representatives listed were included in the stakeholder mapping.

Further; LinkedIn was used to identify HR and senior executives within the construction industry in these geographic areas. In many instances, firms had closed their operations; it was apparent that the construction industry is a fast moving industry in KSA. Academic papers and local research networks were used to identify relevant academics and all relevant ministries were mapped to identify relevant individuals within policy.

In-person surveys were conducted with 47 stakeholders in total: 40 employers, 4 academics with expertise in construction, and 3 Bangladeshi workers. This was lower than the original target of 80, but consistent with aforementioned challenges in stakeholder recruitment for participation in interviews. Local researchers attempt to contact all identified stakeholders at least once, with a limited number agreeing to be interviewed. Survey questions were structured around the key research areas of the project, and included a combination of open-ended and closed questions to enable qualitative and quantitative information to be collected.

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### 3.4. Analysis

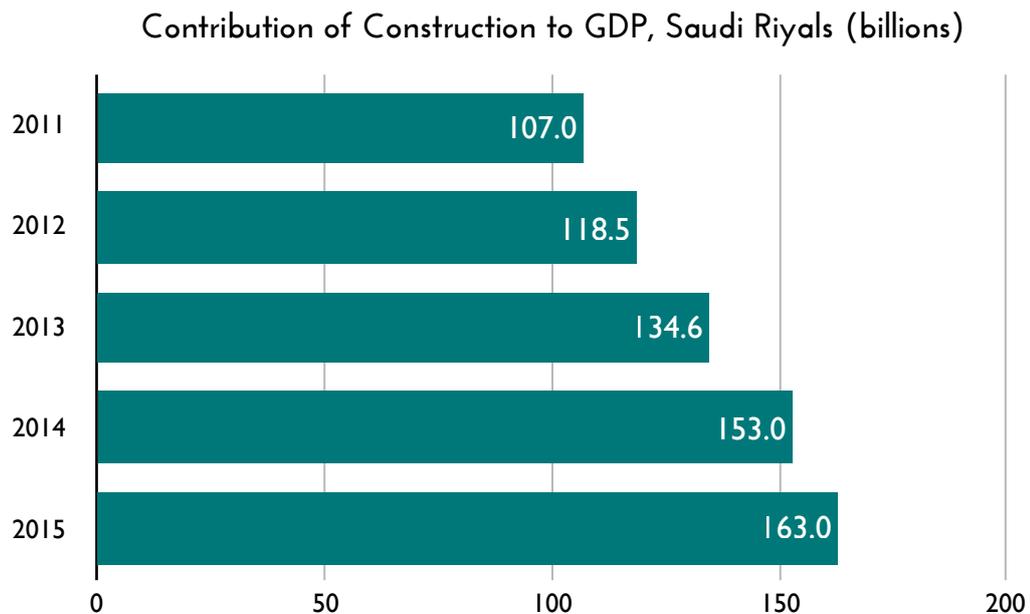
Analysis aimed to establish the barriers and opportunities relating to the employment of Bangladeshi workers in KSA construction industry, and to facilitate the development of evidence-based recommendations in line with the original framework.

Individual stakeholder interviews were recorded (with the interviewee's permission) and annotated; All documentation received from the interviewees was itemised in a spreadsheet and reviewed. Initial findings from the qualitative analysis were then triangulated with the findings from the desk review. Quantitative data was analysed using statistical analysis software in order to isolate aspects such as mean and median salary by nationality. A matrix was used to collate data from the different research elements with reference to the key project themes.

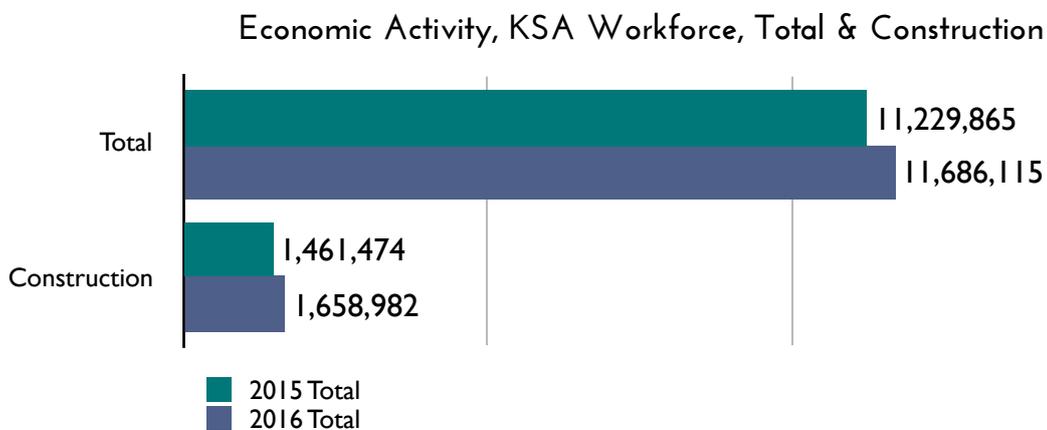
## 4. Context and Trends

### 4.1 The Construction Sector

#### Economic Trends and Growth



The construction sector represents around one seventh of the total workforce in KSA<sup>3</sup> and contributes over 160 billion Saudi riyals to the economy<sup>4</sup>. The size of the construction workforce is growing, with an increase of 14% between 2015 and 2016; a larger percentage than the total workforce size increase for the same period of 4%.<sup>5</sup>



<sup>3</sup> Calculated from <https://www.stats.gov.sa/en/814>.

<sup>4</sup> <http://www.sama.gov.sa/en-US/EconomicReports/Pages/YearlyStatistics.aspx>

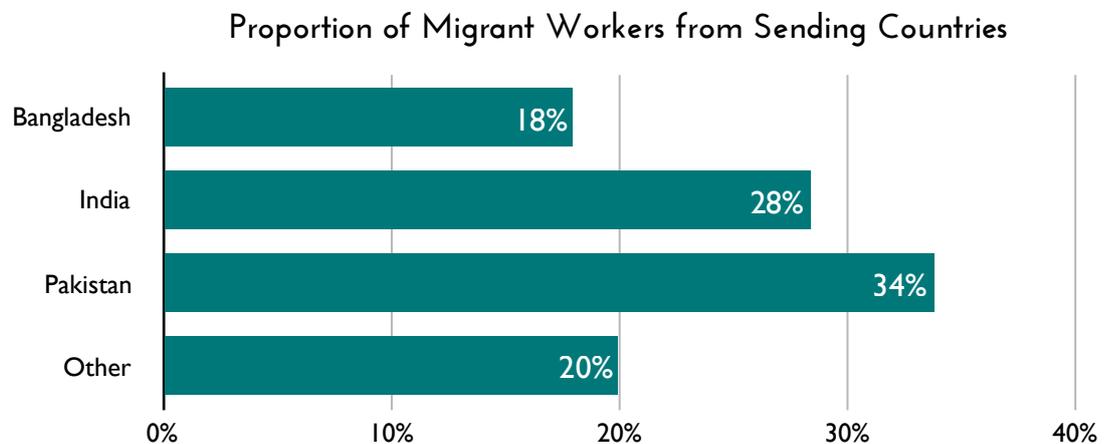
<sup>5</sup> Calculated from <https://www.stats.gov.sa/en/814>.

## Migrant Workforce

Across the population as a whole, migrant workers make up 57% of the employed population in KSA.<sup>6</sup> There were 1.66 million people working in the Saudi construction sector in 2016, of which 1.5 million were immigrants.<sup>7</sup> The construction sector has the highest proportion of overseas workers in the KSA, making the issue of international skills certification and validation particularly pertinent.



Data for the graph below is drawn from surveys conducted with employers in the construction industry. It is likely that the proportion of migrant workers from seceding countries will change in the near future since the ban on migrant workers from Bangladesh was recently lifted.



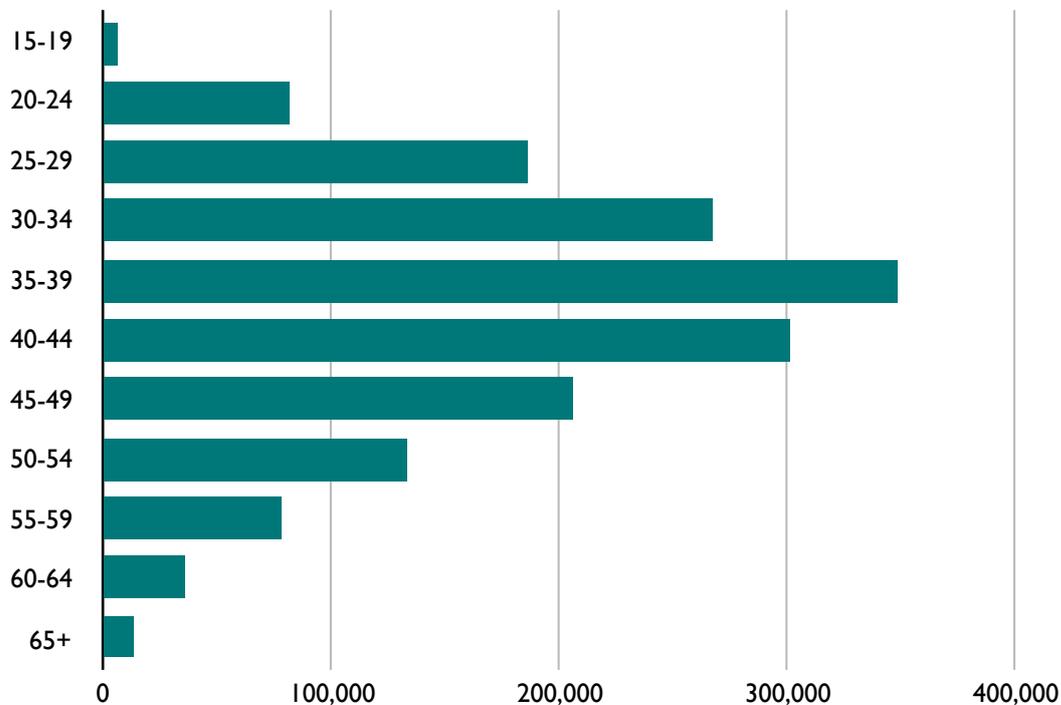
<sup>6</sup> Bel-Air, F. (2014), *Demography, Migration and Labour Market in Saudi Arabia*, Explanatory Note No. 1/2014, Gulf Labour Market and Migration (GLMM) programme (GLMM) programme of the Migration Policy Center (MPC) and the Gulf Research Center (GRC).

<sup>7</sup> Calculated from <https://www.stats.gov.sa/en/814>.

## Workforce Demographics

The median age bracket for individuals working in the construction sector is 35-39.<sup>8</sup>

Age of KSA Construction Workforce



The Saudi construction workforce is better educated than its non-Saudi equivalent, with only 7% of the workforce educated to primary level or below (against 38% for non-Saudis), and 28% educated to degree level or above (against 14% for non-Saudis).<sup>9</sup> This is reflected in the type of occupations typically filled by Saudi nationals in the construction industry, for example, managerial or highly skilled roles such as surveyor or architect.<sup>10</sup>

Education Levels: Construction Workforce in KSA, 2016<sup>11</sup>

	Saudi	Non-Saudi
Illiterate	0.0%	1.1%
Read and write	1.1%	16.7%
Primary	6.0%	20.4%
Intermediate	17.5%	23.3%
Secondary or equivalent	37.5%	18.1%

<sup>8</sup> Calculated from <https://www.stats.gov.sa/en/814>.

<sup>9</sup> Ibid.

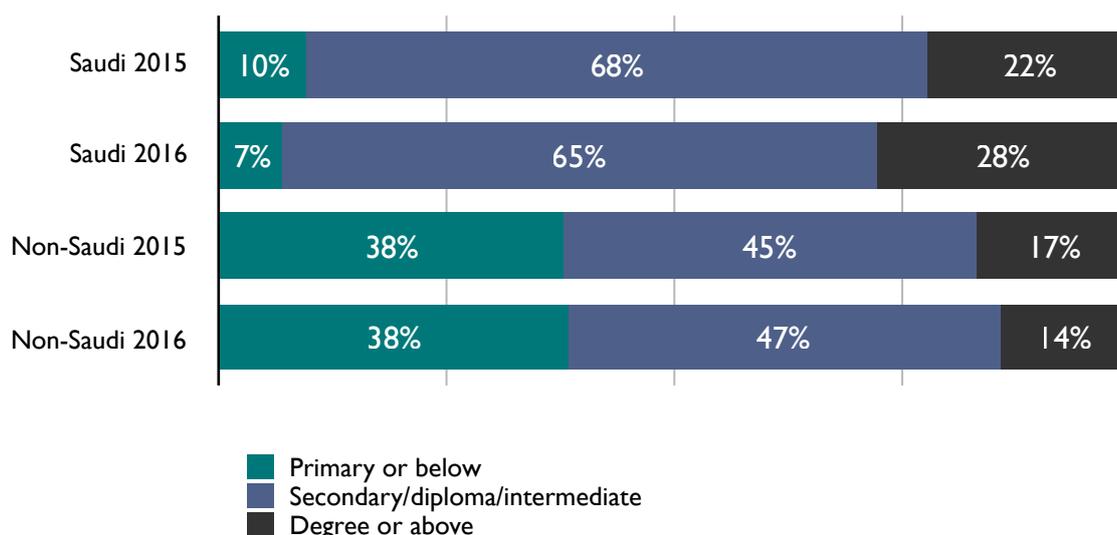
<sup>10</sup> Feedback from IOM 27/04/2017.

<sup>11</sup> Ibid.

Diploma	10.1%	6.1%
Bachelor Degree	24.9%	13.7%
Higher Diploma/Master	2.3%	0.4%
Doctorate	0.6%	0.1%

A comparison of construction sector education levels between 2015 and 2016 shows that the Saudi construction workforce is becoming more educated, with a fall in the proportion educated to primary level or below from 10% to 7%, and an increase in the proportion educated to degree level or above from 22% to 28%. There is a marginal fall in education levels of the non-Saudi construction workforce at higher levels over the same period, with the proportion of those educated to degree level or above falling from 17% to 14%.<sup>12</sup> It is possible that this reported increase in education level for Saudi workers reflects a greater proportion of Saudi nationals recruited to highly skilled roles, with a corresponding fall in non-Saudi workers filling these same roles.

Education Level, KSA Construction Workforce



Please note that some graphs may not add up to 100% where numbers have been rounded.

## 4.2 Bangladeshi Migrant Workforce

### Workforce Profile

Almost all Bangladeshi migrants workers to Saudi Arabia are male (98.5%). The average age of migrants workers is 33 years old. Survey data presented in a recent study indicates that half of Bangladeshi workers in KSA have achieved six to ten years of schooling; 30% have achieved one to five years of schooling; 10% have obtained secondary or vocational certificates and a further 10% have received no formal education.<sup>13</sup> In general, low or semi-skilled migrant workers who up-skill on the job (for example, by working closely

<sup>12</sup> Calculated from <https://www.stats.gov.sa/en/814>.

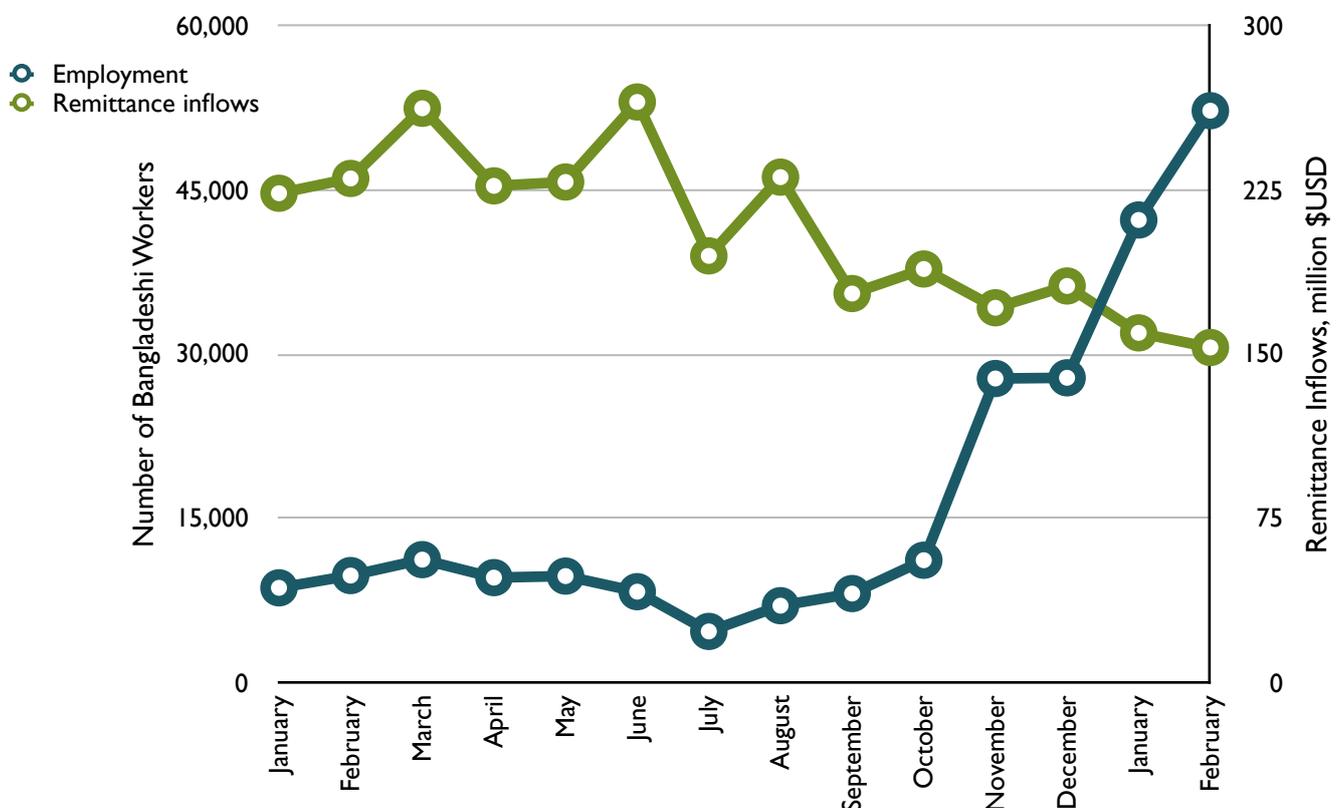
<sup>13</sup> Rahman, M. (2011), *Emigration and the Family Economy: Bangladeshi Labor Migration to Saudi Arabia*, *Asian and Pacific Migration Journal* 20:3-4. For further detail on employers' perceptions of the value of Bangladeshi qualifications, see Section 6.2 below.

with a skilled worker) have difficulties getting these new skills accredited.<sup>14</sup>

### Current Employment Levels

In 2008, the KSA government placed a ban on non-domestic Bangladeshi workers migrating to the country, although many Bangladeshi workers recruited prior to the ban remained in KSA. This ban was said to be an effort to balance the proportion of Bangladeshi migrants with those from countries like India and Pakistan.<sup>15</sup> The ban was lifted in September 2016 leading to an increase in the number of migrants heading to KSA.<sup>16</sup> During the ban period, the number of migrant workers originating from Bangladesh fell to zero, whereas annual levels from 2005-2008 ranged from 2,000 to 5,000 per year for construction workers.<sup>17</sup> It should be noted that these figures do not include migrant workers in associated trades, some of whom are likely to be working in the construction industry, such as carpenters, electricians, labourers, masons, and steel fixers.

Employment of and Remittance Inflows from Bangladeshi Workers in KSA



The number of Bangladeshi migrant workers heading to Saudi Arabia has started to climb sharply again. As of 2016, over 700,000 Bangladeshi workers migrated in search of overseas employment; the largest population of Bangladeshi workers to KSA.<sup>18</sup> An estimated 1.3 millions Bangladeshi workers are currently resident in KSA. Most male Bangladeshi workers are employed in construction, and females in domestic

<sup>14</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

<sup>15</sup> Tuxford, K (2016), *Saudi Arabia opens its doors to Bangladeshi employees*. CIPD.

<sup>16</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

<sup>17</sup> ILO Bangladesh (2016), *Skilling the Workforce: Labour Migration and Skills Recognition and Certification in Bangladesh*.

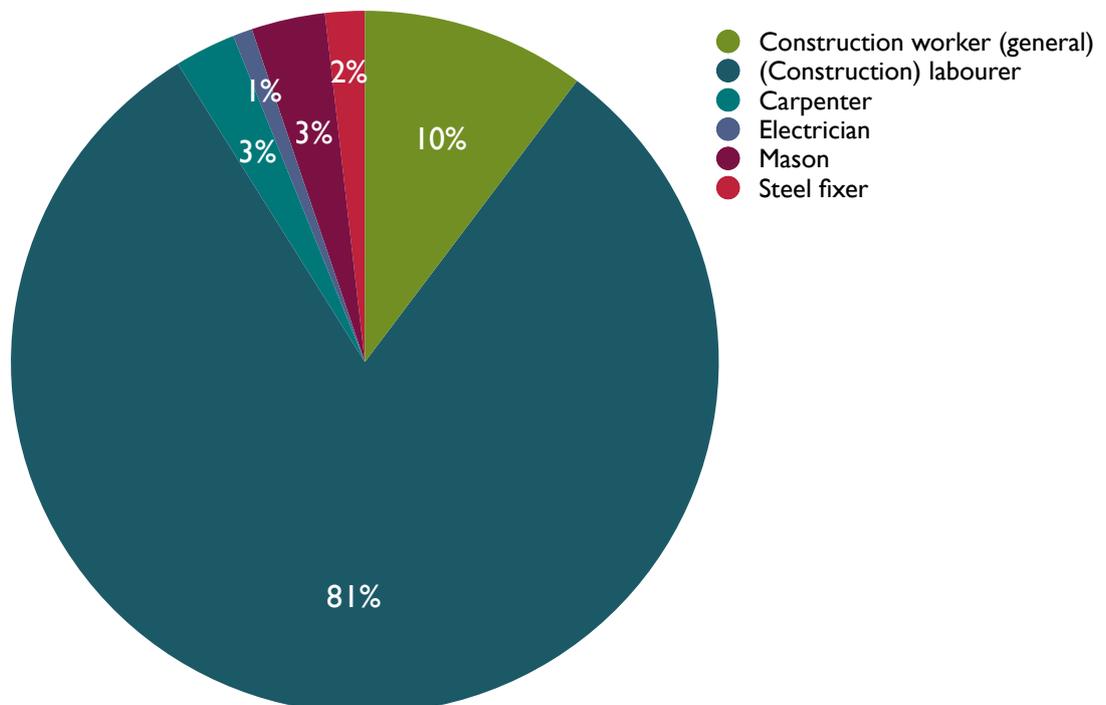
<sup>18</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

service.<sup>19</sup>

In July 2016, the monthly employment figure for Bangladeshi workers was 4,669; in December 2016, it was 27,849; and in February 2017, it was 52,256.<sup>20</sup> Remittance inflows from Saudi Arabia have not caught up, but instead have fallen over the same period.<sup>21</sup> This is consistent with a wider trend of falling remittance inflows globally to Bangladesh, which some commentators attribute to oil price falls as well as increasing use of informal channels for money transfer and mobile banking.<sup>22</sup> This evidence has been queried, however, as remittance inflows through mobile banking are reported to be monitored by the Central Bank.<sup>23</sup>

The employers who participated in the labour market survey employ, on average 7,296 across the KSA as a whole, of which 951 are employed at the site/location of survey respondent. Migrant workers comprise 60% of their workforce.<sup>24</sup> Bangladeshi workers comprise 18% of the migrant workforce among the employers surveyed; this is less than the 28% for India and 34% for Pakistan,<sup>25</sup> but is substantial given that the ban on Bangladeshi migrant workers has only recently ended.

Estimated Bangladeshi Construction Workers in KSA  
by Occupation, 2016



Survey respondents were asked what job titles were most commonly held by Bangladeshi workers in their firm. The most common response was 'worker' or 'labourer'<sup>26</sup>. A variety of more skilled roles were mentioned including 'mason'<sup>27</sup>, 'steel fixer'<sup>28</sup>, 'plumber' and 'technician'<sup>29</sup>. In addition, a number of

<sup>19</sup> Ibid.

<sup>20</sup> <http://www.bmet.gov.bd/BMET/statisticalDataAction>

<sup>21</sup> Ibid.

<sup>22</sup> The Independent (2017) [BB to get report on fall in remittance](#)

<sup>23</sup> Feedback from IOM 27/04/2017.

<sup>24</sup> Labour market survey with KSA construction employers.

<sup>25</sup> Labour market survey.

<sup>26</sup> 23 respondents

<sup>27</sup> 11 respondents

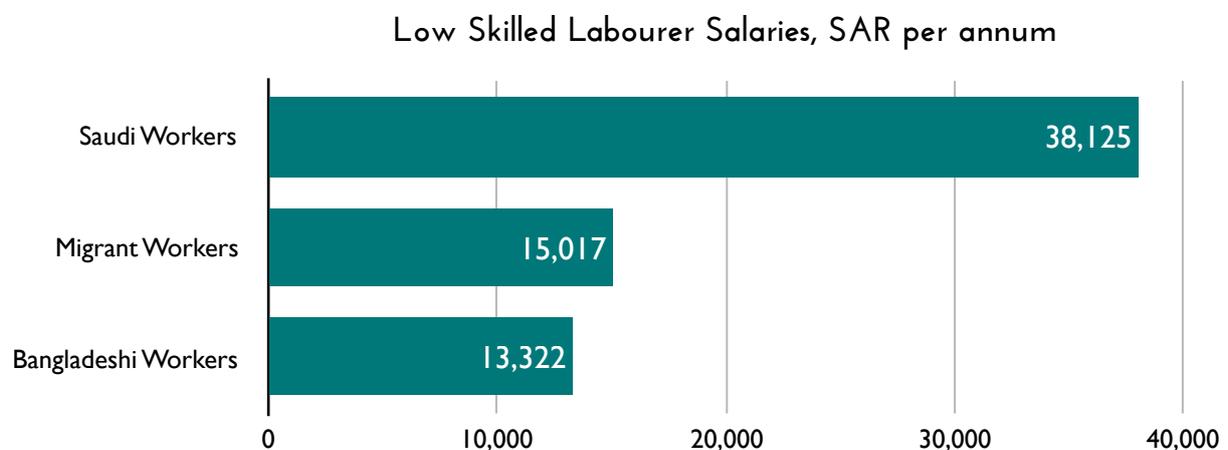
<sup>28</sup> 4 respondents

<sup>29</sup> 2 mentions each

respondents suggested that Bangladeshi workers were commonly employed in auxiliary roles on construction sites, in roles such as ‘cleaner’, ‘tea boy’, and ‘driver’.<sup>30</sup> Using ILO data, we estimate construction jobs for 2016 (see above graph), which demonstrates that the vast majority of Bangladeshi construction workers are employed in low skilled and unskilled roles.<sup>31</sup> This is a key point for City & Guilds and IOM, as it suggests that the barriers to entry for skilled jobs for Bangladeshi workers are very high.

## Salaries

Across all wage categories in the construction industry, Bangladeshi workers are paid less than migrant workers as a whole,<sup>32</sup> although more than they would earn for an equivalent role in Bangladesh.<sup>33</sup> The graphs below indicate average annual salaries in Saudi Riyals. On average, across all occupational categories examined in the survey, migrant workers as a whole are paid 25% more than Bangladeshi workers. There is greater variation in the differential for Bangladeshi workers compared with all migrant workers, with the general trend that there is greater variation in the more skilled jobs.<sup>34</sup>



Bangladeshi low skilled labourers are paid around a third the amount of their Saudi counterparts, at 13,322 Riyals per annum for Bangladeshi workers and 38,125 Riyals for Saudi nationals; however, substantial salary differentials between Saudi workers and migrants/Bangladeshi workers should also be interpreted carefully given differences in minimum wage requirements and typical job roles. As noted above, most Saudi nationals in the construction industry occupy managerial or highly skilled roles, with the remainder working as security staff or occupying ‘ghost’ roles to fulfil national requirements to employ specific ratios of Saudi workers.<sup>35</sup>

Migrant workers as a whole are paid around 13% more than Bangladeshi workers.<sup>36</sup> While there is limited evidence that offers a direct causal explanation of the salary differentials between Bangladeshi workers compared with other migrants workers; however, general trends that may be part of the story include the low proportion of Bangladeshi workers (as few as 4-5% according to recent estimates) completing technical

<sup>30</sup> 11 respondents

<sup>31</sup> Estimated figures were calculated by applying the proportionate breakdown of occupational categories from 2008 (which is the last year which saw significant numbers of construction workers in KSA until the BD migrant ban was lifted last year) to BD migrant outflow figures for 2016. The ‘(Construction) labour’ category was calculated by applying the proportion of specific construction jobs against all jobs to the general ‘Labour’ category. The electrician category, which was not broken down in the original data according to whether individuals work in construction, was calculated in the same way. Sources: [http://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-dhaka/documents/publication/wcms\\_304402.pdf](http://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-dhaka/documents/publication/wcms_304402.pdf) and <http://www.bmet.gov.bd/BMET/statisticalDataAction>.

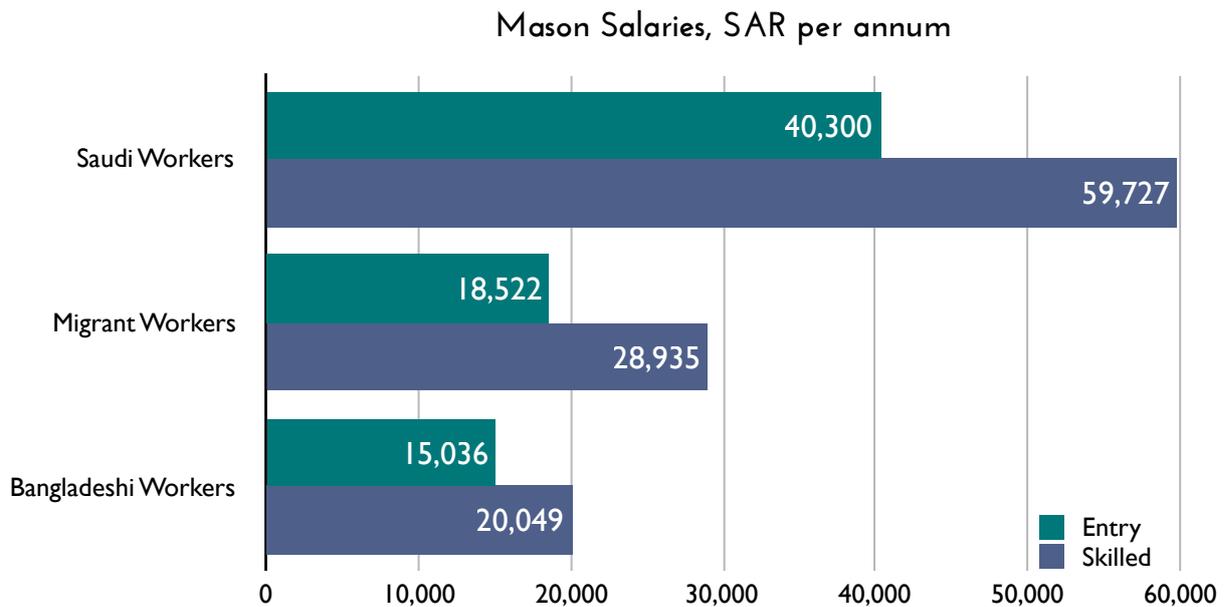
<sup>32</sup> Labour market survey.

<sup>33</sup> Feedback from IOM 27/04/2017.

<sup>34</sup> Labour market survey.

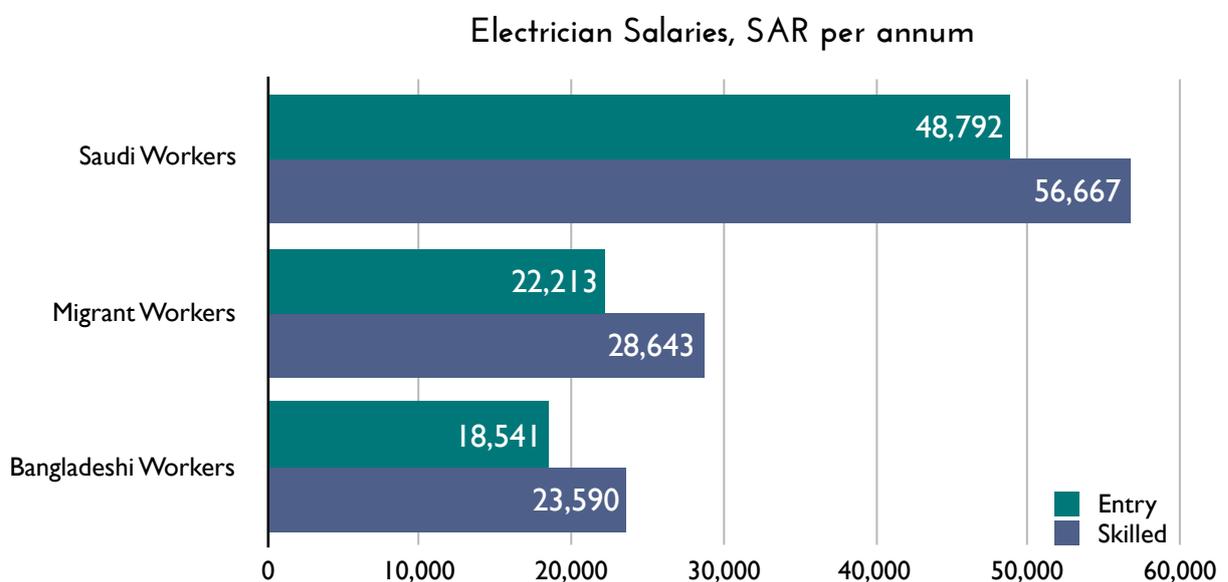
<sup>35</sup> Feedback from IOM 27/04/2017.

<sup>36</sup> Labour market survey.



training in a relevant trade prior to taking up skilled and semi-skilled roles, as well as the perceived willingness of Bangladeshi workers to accept low-paid, unskilled roles compared with other migrants.<sup>37</sup>

A skilled Bangladeshi mason can expect to be paid half the salary of an entry level Saudi mason (20,049 Riyals per annum for the first group, compared with 40,300 Riyals for the second). The pay differential for national workers versus Bangladeshi workers is 186% for entry level masons and 168% for skilled masons; the equivalent differential for all migrant workers compared with Bangladeshi workers is 23% for entry level masons and 44% for skilled masons.<sup>38</sup>



Similarly, a skilled Bangladeshi electrician can expect to earn less than half the annual salary of an entry level Saudi electrician. The pay premium for Saudi national workers compared with Bangladeshi workers is 163% for entry level electrician jobs, and 140% for skilled electrician jobs. Migrant workers as a whole earn 20% more than Bangladeshi workers at the entry level for electricians, and 21% more at the skilled level.<sup>39</sup>

<sup>37</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

<sup>38</sup> Ibid.

<sup>39</sup> Labour market survey.

For skilled plumbers, the pay premium for Saudi nationals is 138% compared with Bangladeshi workers. For migrant workers as a whole, the pay premium is 27%.<sup>40</sup>

## 4.3 Future Trends in Migration, Construction and Employment

### Economic Development

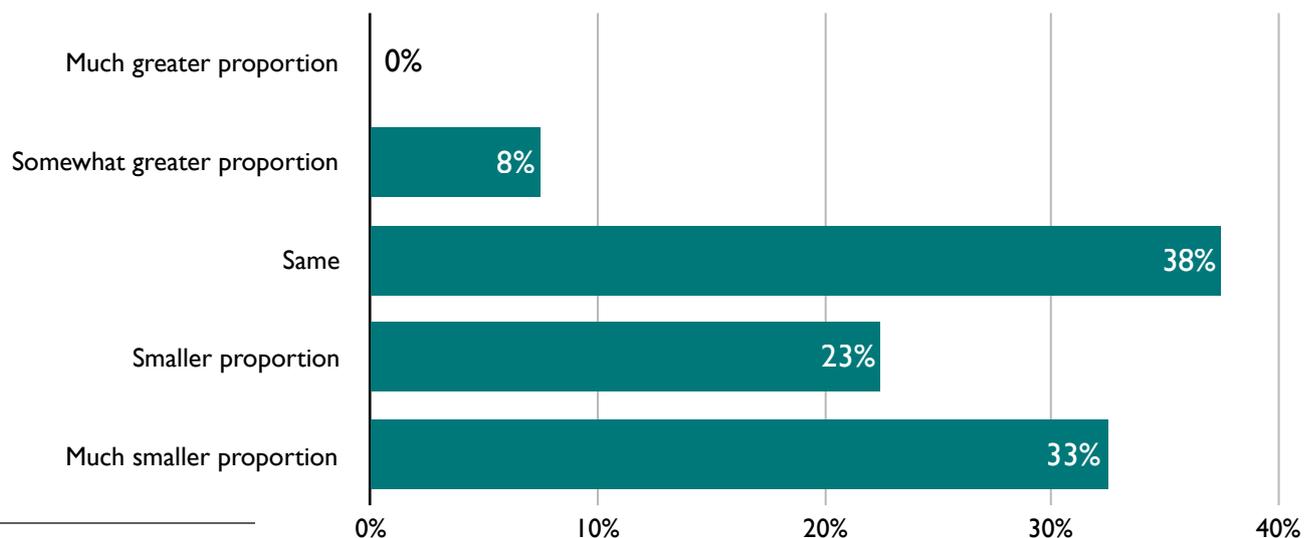
A recent report compiled by the GIZ/ILO concluded that migrant trends in the KSA, and wider GCC region, are likely to remain consistent within the foreseeable future. While there are a number of factors that may produce fluctuations in demand, or diversification within established sectors, the overall picture is likely to be 'more of the same' with construction workers and related occupations forming the majority of the required workforce.<sup>41</sup>

The construction of 'six or more economic and industrial cities' by 2020, as well as two subway systems and the world's tallest building, are likely to maintain, and possibly increase, demand for construction workers in Saudi Arabia. Economic diversification into "green" construction, for example advanced water treatment systems and solar panels, may create further opportunities for migrant workers with specific technical and vocational skills. In addition, Saudi Aramco has recently announced plans to construct three manufacturing facilities.<sup>42</sup>

Fluctuating oil prices, driven in part by larger than expected oil reserves in the United States having the potential to lower global oil prices, may have an impact on the KSA government's principal revenue stream (80% of total budget revenues and 45% of GDP); in turn, this may slow the pace of funds available for the proposed public construction projects.<sup>43</sup> Current forecasts suggest that migration patterns are likely to remain stable despite lower oil prices, however.<sup>44</sup>

### Worker Demand

Anticipated Change in Migrant Workforce



<sup>40</sup> Ibid.

<sup>41</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>42</sup> Ibid.

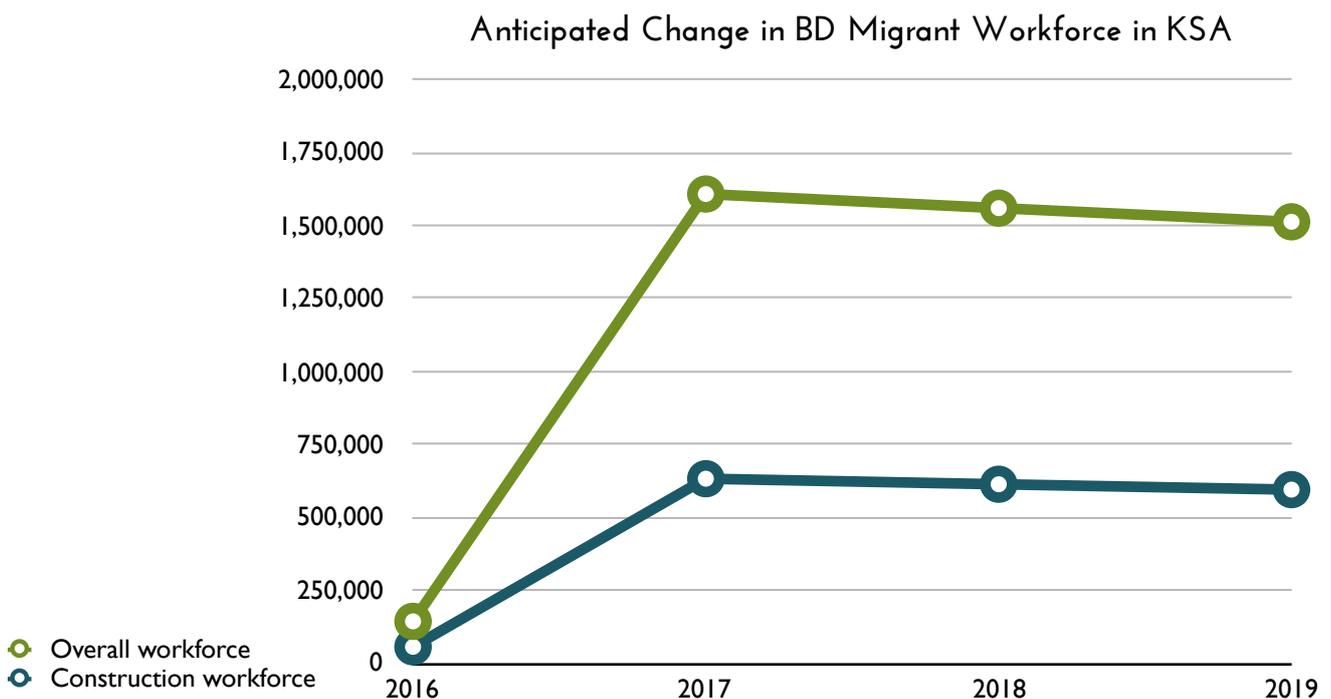
<sup>43</sup> Ibid.

<sup>44</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

The increasing cost of recruitment for employers, as a result of better regulated recruitment driven by mega-recruitment agencies, is likely to make low-skilled workers more expensive for many firms; a GIZ/ILO report suggests that this may result in a preference for higher-skilled workers, who may be perceived as more productive and thus better value for money.<sup>45</sup>

Construction employers, on the whole, anticipate that the number of migrant workers is on a downwards trajectory, with 56% of employers anticipating either a smaller or much smaller proportion of migrant workers in the next five years, while 38% expect it to remain the same, with just 8% anticipating that it will increase.<sup>46</sup>

Some sources point to a major fall in migrant employment over the next decade. McKinsey has predicted that the share of foreign workers in the industrial sector will fall to 26% by 2030, and that Saudi nationals will replace foreign workers even in the lower skilled jobs.<sup>47</sup> A factor which may have a positive impact on opportunities for Bangladeshi workers, however, is the migration situation for nationals of other incoming countries, in terms of policies and procedures. The number of Indian immigrants to Saudi Arabia fell by half in 2016 compared with 2015, as a result of changes to Indian policies and procedures to formalise the migration process by instituting the eMigrate system and increasing the expected minimum wage for Indian workers in KSA.<sup>48</sup> Reports indicate that Bangladeshi workers will benefit from the resulting shortfall in Indian workers over the medium term.



### Workforce and Occupational Change

The Bangladeshi construction worker projections above are based on the assumption that workers will

<sup>45</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

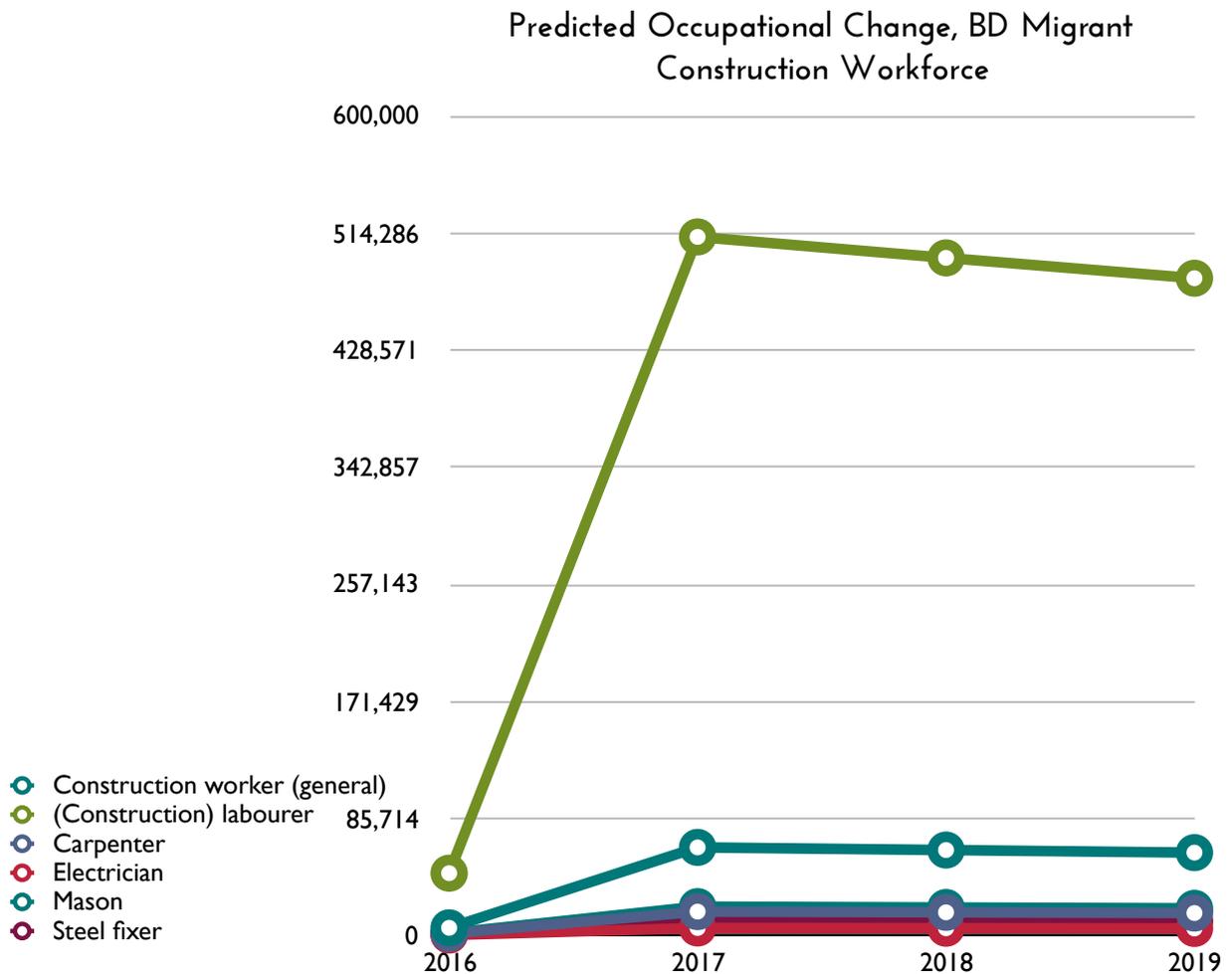
<sup>46</sup> Labour market survey.

<sup>47</sup> <http://www.jeg.org.sa/data/modules/contents/uploads/infopdf/2887.pdf>

<sup>48</sup> <http://www.outlookindia.com/website/story/how-indias-recent-migrant-policies-helped-bangladesh-and-pakistan-eat-into-our-g/298076>

continue to increase<sup>49</sup> by the same average monthly proportion as they have since the end of the migrant ban until May 2017,<sup>50</sup> at which point the number will approximately stabilise. We then predict that the workforce will start falling by a small proportion (3% a year, propped up by the replacement of Indian workers by Bangladeshi workers) from 2018 onwards.

Predicted Occupational Change, BD Migrant Construction Workforce



	2016	2017	2018	2019
Construction worker (general)	5,792	64,693	62,752	60,870
(Construction) labourer	45,809	511,670	496,320	481,430
Carpenter	1,582	17,674	17,143	16,629
Electrician	507	5,664	5,494	5,329
Mason	1,909	21,327	20,688	20,067

<sup>49</sup> Calculated from <http://www.bmet.gov.bd/BMET/statisticalDataAction>; assumptions developed from primary research and external citations highlighted elsewhere in the report.

<sup>50</sup> Chosen because it is roughly a year after the end of the migrant ban.

	2016	2017	2018	2019
Steel fixer	1,021	11,408	11,065	10,733

The graph above shows anticipated occupational change of the Bangladeshi construction workforce in Saudi Arabia. We have assumed that, in the absence of mitigation strategies from outside agencies, that the proportions of workers in different occupations will remain the same (this pattern may change depending on the action that IOM and City & Guilds decide to take on the basis of this report).<sup>51</sup>

## 4.4 Key Findings

- Construction is a sector with strong levels of growth; it also has the highest proportion of migrant workers. Construction employers on the whole anticipate migrant worker demand to be decreasing, however, with over 50% anticipating a smaller or much smaller proportion of migrant workers over the next five years.
- The Saudi construction workforce is better educated than its non-Saudi equivalent; the majority of Saudi construction workers are educated to secondary level, while non-Saudi workers on average are educated to intermediate level. There is also a corresponding difference in the skill level of jobs occupied by Saudi workers compared with non-Saudi workers.
- The number of Bangladeshi workers has risen rapidly since the migrant ban was lifted, from 4,600 in July 2016 to 52,000 in February 2017. Remittances inflows from Saudi have fallen over the same period, however.
- Bangladeshi workers are earning an average of 25% less than migrant workers of other nationalities, although more than they would earn for an equivalent role in Bangladesh.

<sup>51</sup> Sources: [http://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-dhaka/documents/publication/wcms\\_304402.pdf](http://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-dhaka/documents/publication/wcms_304402.pdf) and <http://www.bmet.gov.bd/BMET/statisticalDataAction>; calculations, plus the workforce figures above.

## 5. Recruitment Approaches and Trends

### 5.1 Regulatory Environment

#### Current Context

Recruitment of migrant workers, including those from Bangladesh, is governed by the *kafala* system in Saudi Arabia, although the system is slowly being phased out by the KSA government in response to widely recognised exploitation across the system.<sup>52</sup> The *kafala* system, commonplace across the GCC countries, requires migrant workers to have a sponsor (*kafeel*) who guarantees the migrants' legal residence, entitlement to work and related welfare needs.<sup>53</sup> Under the system, migrant workers need their sponsor's assent to change or quit jobs, and enter or leave the country; these requirements are stipulated under the Anti-Trafficking in Person Law.<sup>54</sup> While the law makes withholding passports and exit visas a punishable offence, it leaves migrant workers open to prosecution for their 'irregular migration status'.<sup>55</sup> Migrant workers are also liable to deportation for any union or strike activity,<sup>56</sup> and both language and logistical barriers prevent them from enforcing the limited working rights that they possess.<sup>57</sup>

Legal reforms in 2015 provided greater protection to many migrants workers under the *kafala* system;<sup>58</sup> however, international organisations that monitor migrants rights continue to warn against the potential exploitation of workers under the *kafala* system, particularly low-paid and low-skilled workers.<sup>59</sup> Workers' dependency on their employers can also create further vulnerabilities; for example, recent reports indicate that a number of construction companies have failed to meet their financial and welfare obligations to migrant construction workers following financial difficulties.<sup>60</sup> There is also evidence of more widespread exploitation of Bangladeshi workers in Saudi Arabia; a situation that is further aggravated by the unwillingness of Bangladeshi mission staff to recognise and support victims of exploitative practices.<sup>61</sup>

A gap often exists between policy and practice.<sup>62</sup> To give a pertinent example, recent regulatory reforms place the burden of recruitment fees and residence permits on official sponsors, typically employers.<sup>63</sup> In practice, however, the requirement has not been effectively upheld and the majority of Bangladeshi migrant workers in male-dominated industries, such as construction, continue to pay the costs of these fees to

<sup>52</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>53</sup> Ibid.

<sup>54</sup> Zahra, M. (2013), Saudi Arabia's Legal Framework of Migration, Explanatory Note No. 4/2013, Gulf Labour Market and Migration (GLMM) programme of the Migration Policy Center (MPC) and the Gulf Research Center (GRC).

<sup>55</sup> Ibid.

<sup>56</sup> Ibid.

<sup>57</sup> Rahman, M. (2011), Emigration and the Family Economy: Bangladeshi Labor Migration to Saudi Arabia, *Asian and Pacific Migration Journal* 20:3-4.

<sup>58</sup> Human Rights Watch, (15/11/2015), 'Saudi Arabia: Steps Toward Migrant Workers Rights'.

<sup>59</sup> Migrant-Rights.org, (11/03/2015), 'Understanding Kafala: An Archaic Law at Cross Purposes with Modern Development'.

<sup>60</sup> Lynch, J. (10/10/2016), 'Migrant Workers Bear the Brunt of Saudi's Archaic Kafala System'. Middle East Eye.

<sup>61</sup> Asia Foundation, (2013), Labour Migration Trends and Patterns: Bangladesh, India, Nepal 2013.

<sup>62</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>63</sup> Zahra, M. (2013), Saudi Arabia's Legal Framework of Migration, Explanatory Note No. 4/2013, Gulf Labour Market and Migration (GLMM) programme of the Migration Policy Center (MPC) and the Gulf Research Center (GRC).

recruitment agencies.<sup>64</sup> In some cases, these fees are high enough that Bangladeshi families struggle to meet debts incurred during the recruitment process even with remittances sent home by migrants workers.<sup>65</sup>

The same inaction has beset the Colombo Process (2003) and the Abu Dhabi Dialogue (2008): two broader regional processes to improve employment conditions and practices for migrant workers from across South East Asia migrating to GCC and economically prosperous Asian countries.<sup>66</sup> Saudi Arabia is noted as taking particular steps towards implementing these policies, in part through large, 'partially regulated', recruitment agencies.<sup>67</sup> These mega-agencies often fulfil the role of sponsors rather than employers; however, many large companies, including those within the construction industry, are reluctant to use mega-agencies because of the higher costs involved in recruiting unskilled workers compared to the old system, where costs were transferred to the worker.<sup>68</sup>

There are also specific restrictions on the number of migrant workers from Bangladesh permitted to enter Saudi Arabia; a policy partly developed in response to the large number of migrant workers already based in the country, according to an ILO report.<sup>69</sup>

### Migrant Recruitment vs National Recruitment

Policies to encourage KSA nationals to seek employment in the private sector include the 'Hafiz' system,<sup>70</sup> which grants young Saudi jobseekers allowance of SAR 2,000, and the 2011 Nitaqat campaign, which categorises firms according to their primary economic activity and size, which are used, in turn, to set target ratios of foreign to national workers.<sup>71</sup> A combination of incentives for compliance and sanctions for non-compliance are used to encourage firms to meet targets;<sup>72</sup> visas obtained by each firm are used to track progress towards these targets.<sup>73</sup>

While these policies have increased the ratios of national workers compared to migrant workers within the public sector, many private companies show a continued preference for migrant workers because of their lower wages and higher productivity.<sup>74</sup> This was driven, in part, by the introduction in 2012 of a national

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<sup>64</sup> Rahman, M. (2011), Emigration and the Family Economy: Bangladeshi Labor Migration to Saudi Arabia, *Asian and Pacific Migration Journal* 20:3-4.

<sup>65</sup> Ibid.

<sup>66</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>67</sup> Ibid.

<sup>68</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>69</sup> Cited in: Asian Development Bank, (2016), Overseas Employment of Bangladeshi Workers: Trends, Prospects and Challenges, ADB Briefs No. 63.

<sup>70</sup> Bel-Air, F. (2014), Demography, Migration and Labour Market in Saudi Arabia, Explanatory Note No. 1/2014, Gulf Labour Market and Migration (GLMM) programme (GLMM) programme of the Migration Policy Center (MPC) and the Gulf Research Center (GRC).

<sup>71</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>72</sup> Bel-Air, F. (2014), Demography, Migration and Labour Market in Saudi Arabia, Explanatory Note No. 1/2014, Gulf Labour Market and Migration (GLMM) programme (GLMM) programme of the Migration Policy Center (MPC) and the Gulf Research Center (GRC).

<sup>73</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>74</sup> Ibid.

minimum wage of SAR 3,000 for Saudi nationals working in the private sector.<sup>75</sup> The policy has contributed to a significant wage differential.<sup>76</sup>

A minimum wage for migrant workers (just under 50% of the minimum wage for Saudis) has been under consideration for a number of years.<sup>77</sup> One of the principals aims of setting a minimum wage for migrants is reportedly to *'diminish the relative attractiveness of hiring from outside the country on salary grounds alone'*.<sup>78</sup> The KSA government is also reported to be considering a minimum skill level for migrant workers.<sup>79</sup>

Further policies have also been enacted to expand vocational training programmes for nationals to support in-country recruitment to skilled roles.<sup>80</sup> This includes establishing the Saudi Skills Standard (SSS) to oversee the expansion of high-quality TVET provision for Saudi nationals, building new Colleges of Excellence with 'state of the art' technology and other resources, and reform of the National Occupation Skills Standards (NOSS) to ensure relevance and quality standards.<sup>81</sup>

Another significant area of policy development within KSA is the Vision 2030, which articulates a long-term plan for developing and diversifying the national economy.<sup>82</sup> While the Vision 2030 does not refer specifically to developments within the construction industry, commentators have drawn out a number of different areas for development that may augment demands for services in the construction industry, such as developing city infrastructure, supporting greater tourism and creating renewable energy sources.<sup>83</sup>

From the Bangladeshi perspective, there is a long-term trend for overseas employment, which has a positive impact on GDP through workers' remittances sent home.<sup>84</sup> The ADB considers three critical factors to further improve migration flows and practices for Bangladeshi workers: bilateral agreements between sending and receiving countries; recognition of migrant workers' skills; and better governance of the recruitment process to address high recruitment fees and other exploitative practices.<sup>85</sup>

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## 5.2 Recruitment Approaches

The majority of migrant workers are recruited through recruitment agencies; however, as noted above, many migrants incur considerable debts through this process. The situation is further exacerbated by the large number of intermediaries, such as migrant brokers, operating in local communities where access to city-based recruitment agencies may be limited; these intermediaries often charge additional fees on top of

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<sup>75</sup> Bel-Air, F. (2014), *Demography, Migration and Labour Market in Saudi Arabia*, Explanatory Note No. 1/2014, Gulf Labour Market and Migration (GLMM) programme (GLMM) programme of the Migration Policy Center (MPC) and the Gulf Research Center (GRC).

<sup>76</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), *Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia*.

<sup>77</sup> ArabianBusiness.com, (20/04/2016), *'Labour Committee Call for Minimum Wage in Saudi Arabia'*.

<sup>78</sup> Carroll, G. (2016), *Maximising the Potential of Labour Migration Through Skills Development and Certification*, Internal Report, International Organisation for Migration (IOM).

<sup>79</sup> Ibid.

<sup>80</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), *Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia*.

<sup>81</sup> Doyle, L. (02/03/2015), *'Saudi Arabia: Changing Times, New Opportunities'*, Education Technology News Blog.

<sup>82</sup> <http://vision2030.gov.sa/en>

<sup>83</sup> Ventures Onsite (13 May 2016), *'Saudi Arabia Vision 2030: Setting the Stage for Greater Economic Fortune & Away from Oil'*.

<sup>84</sup> Asian Development Bank, (2016), *Overseas Employment of Bangladeshi Workers: Trends, Prospects and Challenges*, ADB Briefs No. 63.

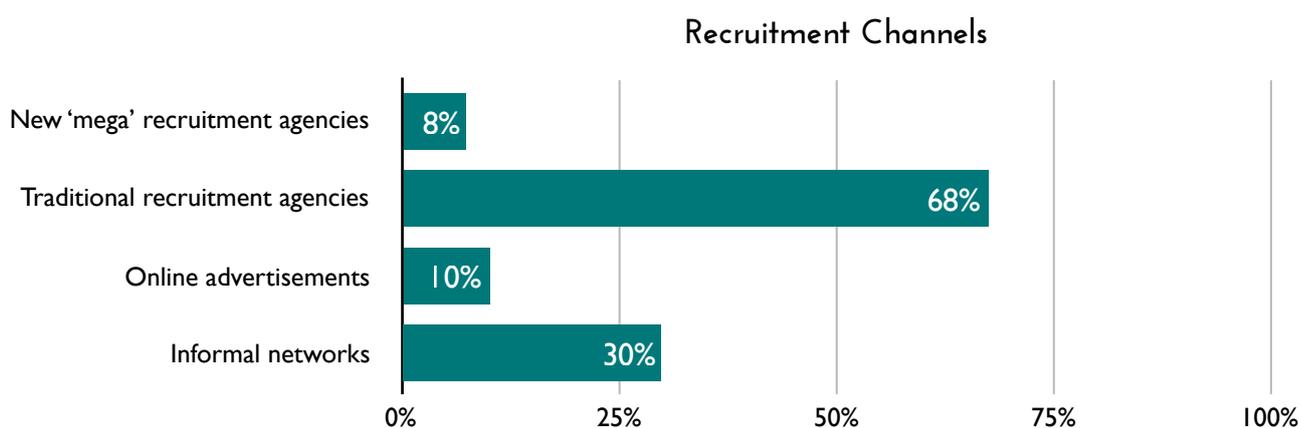
<sup>85</sup> Ibid.

those required by the recruitment agencies.<sup>86</sup>

In 2013, KSA licensed ten mega-agencies to streamline the recruitment process, improve regulation and reduce exploitation; as noted above, however, there has been resistance to changes to the status quo from employers, as well as smaller recruitment agencies, for whom recruiting migrant workers remains a 'lucrative business'.<sup>87</sup> Analysts also suggest that these mega-agencies could have a vital role to play in establishing a more standardised selection criteria, including a transnational certification system aligned to TVET systems within the country of origin.<sup>88</sup>

Experienced migrant workers are more likely than first time migrants to arrange employment directly with employers using existing personal networks, which reduces overall fees and increases chance of successful migration.<sup>89</sup> There are also risks involved in organising visas outside of traditional recruitment agencies; for example, the growing trade in 'flying visas' where migrants pay a fee to a sponsor in order to seek employment with alternative employers after arriving in KSA, although accessing these unofficial channels may leave migrants workers vulnerable to illegal working practices.<sup>90</sup>

According to survey respondents, by far the most popular means of recruiting Bangladeshi workers among construction employers is the use of traditional recruitment agencies (68%). This is followed by informal networks (30%) and online advertisements (10%). Only 8% of employers use the new government-registered 'mega' recruitment agencies.<sup>91</sup>



On average, the recruitment process for Bangladeshi migrant workers is just over five months from the initial payment to recruitment agencies through to departure to Saudi Arabia.<sup>92</sup> Critical factors for recruitment agencies were found to be 'physical fitness and good health, their readiness to accept the salary on offer and willingness to depart as soon as possible' with TVET qualifications and certificates having 'little value in

<sup>86</sup> Asia Foundation, (2013), Labour Migration Trends and Patterns: Bangladesh, India, Nepal 2013.

<sup>87</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>88</sup> Ibid.

<sup>89</sup> Rahman, M. (2011), Bangladeshi Migrants Workers in the UAE: Gender-Differentiated Patterns of Migration Experience, *Middle Eastern Studies* 47:2.

<sup>90</sup> Ibid.

<sup>91</sup> Labour market survey.

<sup>92</sup> Rahman, M. (2011), Emigration and the Family Economy: Bangladeshi Labor Migration to Saudi Arabia, *Asian and Pacific Migration Journal* 20:3-4.

the current labour markets'.<sup>93</sup>

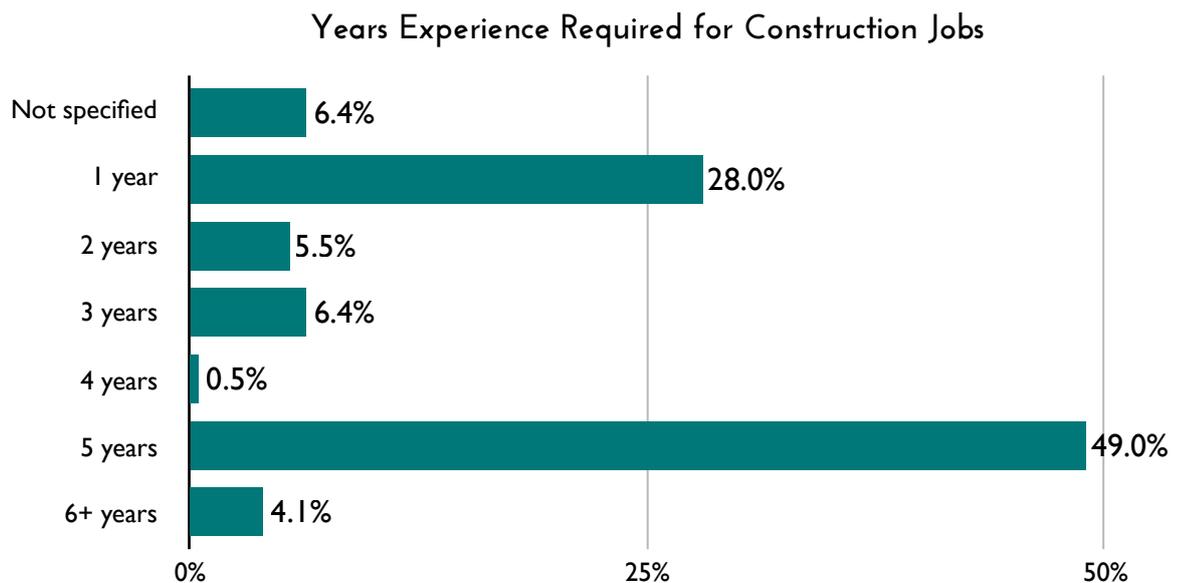
### 5.3 Key Recruitment Criteria

Industrial experience is by far the most significant attribute Saudi employers look for in migrant workers; KSA recognised qualifications, including those from other countries such as TESDA in the Philippines or City & Guilds in the UK, are also important. The graph below shows a mean score out of 4, where 4 is equivalent to 'very important' and 0 is equivalent to 'not at all important'.



#### Industrial Experience

Experience is a critical asset that employers look for, with the majority of survey respondents indicating that it was the key criterion. The length and location of experience was also noted by respondents as being important, with some employers preferring those who have already had experience of Saudi culture. The job scan revealed that more than half the construction worker positions reviewed required at least five years' experience. Only 2% did not specify a minimum amount of a year.<sup>94</sup>



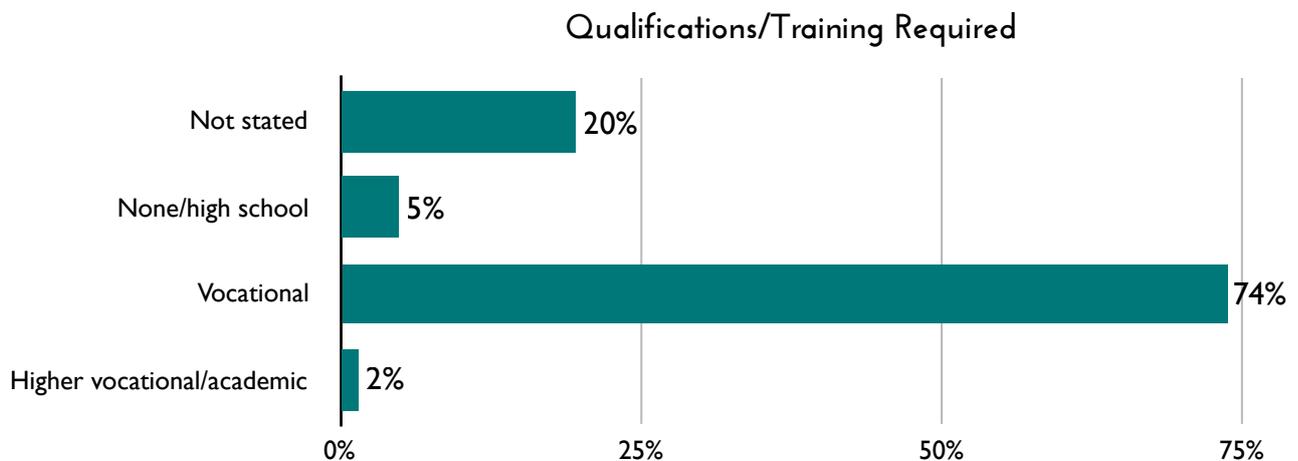
<sup>93</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

<sup>94</sup> Jobs scan.

## Certification and Qualifications

The majority of positions advertised require vocational training or certification, such as training offered at ITIs leading to a diploma.<sup>95</sup>

In contrast, there was mixed feedback as to the importance of certification and qualifications. Some employers felt that certification had a direct impact on the pay that a worker could expect to receive: *'if he has many qualifications, then this will mean more pounds for him'*; for one employer, though, the need for certification varies with the job level: *'for low skilled jobs we don't care about certification. For semi skilled and high skilled jobs, certification is very important.'* Some employers reported not prioritising certification because their organisation tests prospective employees at their own in-house test centres, where they can verify applicant skills themselves.<sup>96</sup>



## Personal Attributes

Some jobs scanned specified gender (all male) and others specified age, the lower bound of which tended to be between 20 and 25, and the upper bound between 35 and 50.<sup>97</sup> Personal attributes were also noted by employers as being of importance, with one respondent citing physical fitness and communication skills as being important: *'Saudi Arabia is a hot country and the construction sector is among the hardest. So I check physical fitness, communication skills and to some extent the skills required to do the job.'* Behaviour and positive attitude were also noted as important attributes by employers, with one also noting a preference for unmarried workers.<sup>98</sup>

## 5.4 Barriers to Recruitment for Bangladeshi Workers

Bangladeshi workers are more likely to be found in low-skilled construction jobs than in higher-skilled positions; the reasons for this, according to employers, include regulatory issues, lack of training and qualifications, willingness to accept low pay, and behavioural issues.

### Regulatory issues and cost

According to one respondent, the current demand in KSA for lower skilled jobs, including labouring, means that more visas are issued for these categories. Another respondent noted that some firms hire

<sup>95</sup> Jobs scan.

<sup>96</sup> Labour market survey.

<sup>97</sup> Jobs scan.

<sup>98</sup> Labour market survey.

Bangladeshis as a means of meeting governmental conditions. According to this respondent, some large construction projects are only awarded on the condition that the winning firm has a certain number of employees: *'these big groups hire cheap workforce from Bangladesh on a very minimal salary, as low as GBP50 per month....they put them for very low skilled and unimportant jobs.'* Further, this respondent felt that these conditions had created an *'understanding'* between employers and recruitment agencies that Bangladeshi workers are *'hired for the sake of paperwork....they want to hire uneducated, low skilled Bangladeshi workers who do not even know their rights.'*

One of the other major challenges facing Bangladeshi workers who wish to migrate to Saudi Arabia is the high cost of fees charged by recruitment agencies, which charge in the range of Tk 8-10 lakh<sup>99</sup> per worker (the cost of which is borne by the individual worker, not by the employer). The rate for KSA is also higher than other comparable inbound countries such as Qatar.<sup>100</sup>

*'they want to hire uneducated, low skilled Bangladeshi workers who do not even know their rights...'*

Employer

### Lack of training and skills

Most Bangladeshi migrants workers *'lack training appropriate to their trade and very few have qualifications recognised in the host nations'*.<sup>101</sup> Prior TVET experience for South East Asian migrant workers has little value within the recruitment process for GCC countries, including Saudi Arabia; the notable exception is migrant workers from the Philippines.<sup>102</sup> Explanatory factors include *'poor reputation, low perceived relevance or lack of equivalence'* of TVET training within country of origin.<sup>103</sup> A recent study referred to *'a strong preference'* for low skilled jobs amongst migrant workers from Bangladesh and neighbouring South East Asian countries given the lack of specific skills prior to migration.<sup>104</sup> Recent estimates by BMET suggest that nearly half of Bangladeshi migrants workers are less-skilled (45%), while 16% are classified as semi-skilled and only 35% are classified as skilled workers.<sup>105</sup>

A recent GIZ/ILO report cautions that official data on migration flows, including occupation and skill level, may not be wholly reliable, however. Recruitment agencies need to supply workers to meet perceived demand within a system of regulated visa allocations; as such, agencies may speed up the recruitment process, minimise fees paid by employers and decrease wages paid to workers by labelling migrant workers as unskilled, regardless of actual skill level.<sup>106</sup> The absence of internationally recognised skills certification across many countries of origin, including Bangladesh, further hinders the classification process.

A large proportion of respondents<sup>107</sup> agreed that the reason Bangladeshi workers are to be found in low skilled construction work is because the majority come to KSA without any prior training. *'Most of them who come here are uneducated.'* One respondent noted that Bangladeshi workers don't have skills that he, as an employer can trust: *'they should be trained here before taking any responsibility, as they usually come from their country without skills.'* Another noted that in his 11 years of working for the same organisation, he had yet to

<sup>99</sup> 9,969-12,460 USD, converted 2017-03 using <http://www.xe.com/>

<sup>100</sup> <http://www.newagebd.net/print/article/11564>

<sup>101</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

<sup>102</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>103</sup> Ibid.

<sup>104</sup> Asia Foundation, (2013), Labour Migration Trends and Patterns: Bangladesh, India, Nepal 2013.

<sup>105</sup> Asian Development Bank, (2016), Overseas Employment of Bangladeshi Workers: Trends, Prospects and Challenges, ADB Briefs No. 63.

<sup>106</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>107</sup> 13 respondents

see a Bangladeshi worker who had sufficient qualifications to allow work in higher skilled jobs. It was also noted by one respondent that, unlike in India, there is a lack of vocational testing centres in Bangladesh where skills can be verified. Some respondents<sup>108</sup> felt that it was uncommon for Bangladeshi workers to improve their skills levels and obtain promotions, unlike their Indian and Pakistani counterparts: ‘...many Indians and Pakistanis were initially labourers and masons when they came here. Now they are crane operators, and some of them actually run their own projects. You do not see this often in Bangladeshi workers.’ The respondents did not say what was preventing this upward mobility.

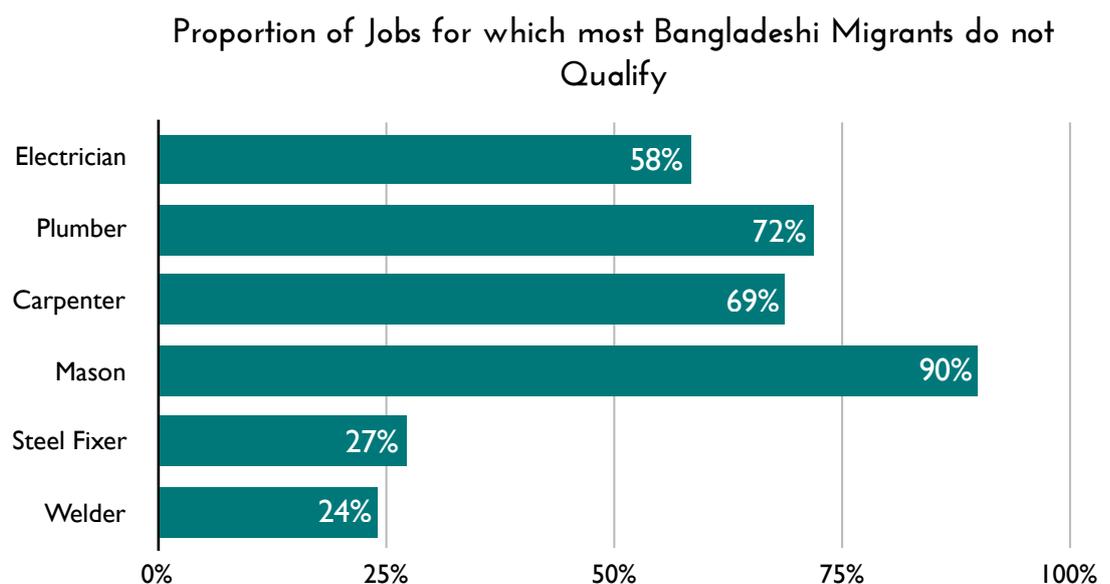
### Willingness to accept low pay

Some employers<sup>109</sup> noted that because the salary they are willing to accept is so low (600SR per month was given as an example), Bangladeshi workers are hired for the lower-end jobs. One of the respondents, however, noted that his organisation had hired higher-skilled workers from Bangladesh because they had specifically searched for those with higher qualifications. Another respondent felt that employers in KSA benefit from cheap labour because Bangladeshi workers have little bargaining power; he noted that ‘many of them come to Saudi on as low as 200 Riyals per month...this is ridiculous.’

### Behavioural issues

Two respondents noted concerns with ‘moral and behavioural issues’ raised about Bangladeshi workers, and also issues with frequent absences from work: ‘I prefer to recruit from Nepal rather than Bangladesh as the Nepali worker shows more commitment to work.’ Another respondent described the scenario, noted earlier in this report, in which Bangladeshi workers are required to take on significant debt to be able to afford the visa to KSA. The respondent observed that, once in KSA, they are unable to repay their debts due to the low wages, which forces them to turn to unlawful activities or additional employment. Another respondent reported the negative impact that this debt burden on Bangladeshi workers’ commitment to their primary jobs: ‘I started receiving complaints about them that instead of focusing on their work, they spent their time on other jobs such as cleaning cars and getting extra money. They were not committed to their original assigned jobs. I had to fire all of them at the end.’ It is likely that an RPL programme would enable Bangladeshi workers to secure more skilled - and thus better paid jobs - to help to alleviate this problem.

### Lack of suitable jobs



<sup>108</sup> Two respondents

<sup>109</sup> 5 respondents

Many jobs are not open to Bangladeshi workers, either as a whole workforce (because jobs specifically target nationals from other countries such as India and Pakistan), or as a majority workforce (because most construction workers will not meet minimum criteria such as being able to speak English or Arabic fluently). The jobs scan revealed that for the six occupations of interest, in only two were more than half of positions open to the whole Bangladeshi workforce.<sup>110</sup> The barriers to entry in terms of job access by nationality are greatest for masons, carpenters, plumbers and electricians.

## 5.5 Key Findings

- There is evidence, corroborated in primary research with employers, of widespread exploitation of Bangladeshi workers, and a lack of support available from Bangladeshi mission staff.
- While there are policies aimed at promoting employment of Saudi workers, there is a continued preference amongst employers for migrant labour because of lower costs and higher productivity.
- The ADB considers three key priorities for improving migratory flows for Bangladeshi workers: bilateral agreements between sending and receiving countries; recognition of migrant workers' skills; and better governance of the recruitment process.
- The introduction of 'meta recruitment agencies', may assist in standardising the selection criteria for migrant workers, including the requirement for a transnational certification system. The majority of employers, however, still use either traditional recruitment agencies or informal networks.
- Industrial experience is the most important attribute for prospective employees; more than half of the job ads reviewed specified at least five years' experience.
- There was mixed feedback as to the importance of certification and qualifications, with some employers either not trusting certification provided by prospective employees and others preferring to do their own in-house skills tests.
- The largest barrier to recruitment for Bangladeshi workers is a general lack of training and skills; employers report workers arriving without any prior training, and also indicate that Bangladesh suffers from a lack of vocational testing centres, in contrast with India.
- Employers report significant concerns with Bangladeshi workers' behaviour and attitudes; there are also widespread reports of illegalities, with one employer reporting that Bangladeshi migrant workers are driven to take additional employment or engage in unlawful behaviour to offset the debts they have incurred in coming to Saudi Arabia.
- Many jobs are not open to Bangladeshi workers because they are either targeted at workers of other nationalities or because they do not meet minimum criteria (e.g. speaking Arabic or English fluently). Of six occupations of interest, in only two were more than half of positions open to the Bangladeshi workforce.

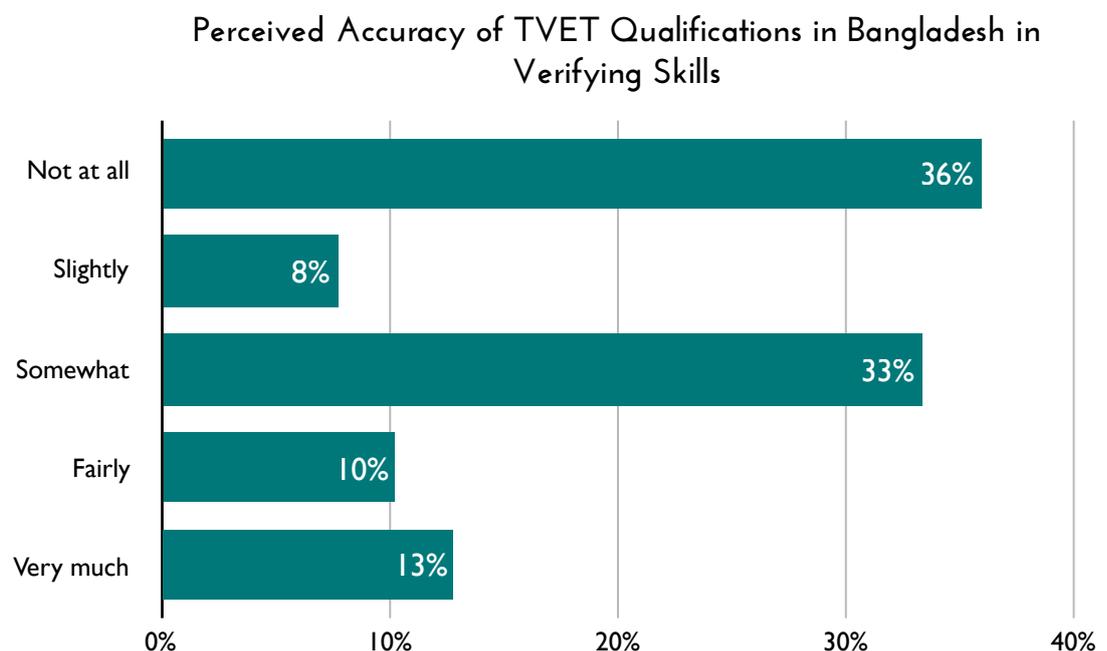
<sup>110</sup> Jobs scan.

## 6. Perceptions of the Bangladeshi Workforce

### 6.1 Perceived Value of Bangladeshi Qualifications

Only 23% of construction employers believe that TVET qualifications obtained in Bangladesh are fairly or very accurate in verifying Bangladeshi workers' skills, with almost half (44%) believing that they are either not at all or only slightly accurate.<sup>111</sup>

The majority of survey respondents could not name an organisation that provides certificates to



construction workers - instead relying on recruitment agents or experience to determine workers' suitability for posts. One respondent said his firm had offices abroad to examine the skills of workers, by administering tests in-country: *'our approach is more trusted than other training centres or other organisations who can provide certificates'*.<sup>112</sup>

Another respondent expressed scepticism of certificates from migrants' home countries: *'We brought a few medium and high skill workers to Saudi Arabia because they had good certification. However, they failed to demonstrate their skills in the job on first day. So next day, we sent them back. After this, we do not trust these certificates'*<sup>113</sup> One respondent said that Bangladeshi qualifications were less likely to be well-received than those of other sending nations.

### 6.2 Perceived Opportunities and Future Trends

#### Employee Perception of Opportunities

Opinion on the level of opportunities available to Bangladeshi workers varied among employee interviewees. One respondent, referring to high demand for skilled masons, technicians and surveyors, was

<sup>111</sup> Labour market survey.

<sup>112</sup> Ibid.

<sup>113</sup> Labour market survey.

optimistic about the possibilities of gaining high skilled work. It is clear, however, that negative perceptions of Bangladeshis are a barrier: *'look, there are opportunities available for all south Asia nationalities. but Saudi government and Saudi employers have problems with Bangladeshis; they think we are bad people.'*<sup>114</sup>

### Anticipated Impact of Lifting the Migrant Ban

The majority of survey respondents felt that the lifting of the migrant ban would have no impact on the perception of Bangladeshi workers.

While a number of employer respondents felt that the lifting of the migrant ban would have an improvement on employment prospects for Bangladeshi workers, the majority felt it would not have any change at all. Respondents felt that this was due to two key reasons: firstly, that employers had found alternate resources (other nationalities) when no Bangladeshi workers were available, and were content to stay with these workers; and secondly, because the reputation of Bangladeshi workers is so low, employers are not likely to be inclined to start hiring them again. Another employer, however, felt that a consequence of the migrant ban has been a reduction in wages for Bangladeshi workers (i.e. they are now willing to accept lower pay than before), which, for employers concerned solely with costs, is likely to mean more employment opportunities.

*'Saudi employers have problems with Bangladeshis; they think we are bad people.'*

Migrant worker

Overwhelmingly, employers did not feel that the lifting of the migrant ban would have any impact on skills recognition for Bangladeshi workers. This was the same for salary levels.

## 6.3 Key Findings

- Employer perceptions of Bangladeshi workers are overwhelmingly negative, with only a minority of respondents having a positive view or experience. Key areas of negative perception include poor communication skills and language abilities; a tendency towards insularity; physical unsuitability for construction work; behavioural and moral issues; and general untrustworthiness.
- There is some evidence from employers that the mode of work (contract term; level of supervision) may affect commitment and performance of Bangladeshi workers; this may be an area for further consideration.
- While some employers felt that problems with construction staff is universal and not attributable to one nationality, others perceived a problem specifically with Bangladeshi staff, which may partly due to the more onerous working conditions that they experience, for example, high debt burdens.
- Only 23% of employers believed that TVET qualifications obtained in Bangladesh are fairly or very accurate in verifying worker skills; employers also indicated that certification from Bangladesh was less likely to be well received than those of other sending nations.
- Little to no impact was expected by employers from the lifting of the migrant ban in the areas of perceptions of Bangladeshi workers, their skills recognition and their salaries. In terms of employment prospects, employers felt that there would also be little to no positive impact from the lifting of the ban, with some employers pointing out that the ban had forced employers to seek alternate resources (e.g. from other nations), which they were now accustomed to using.

<sup>114</sup> Labour market survey.

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## 7. RPL Test

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### 7.1 Background

The KSA is already trialling programmes to test and certify migrants both in the sending and receiving countries under an RPL Programme (SVP).<sup>115</sup> An RPL Programme offers equivalent certification to Recognition of Prior Learning (RPL).

According to the recent IOM internal report, *'the planned skills testing of expatriate workers... are very likely to increase the need for Bangladeshi workers to engage in skills development prior to departure'*.<sup>116</sup> However, this would require addressing migrant workers' reluctance to engage in training rather than taking immediate job opportunities, as well as persuading recruitment agencies and foreign employers of the demonstrated success of skills development and certification.<sup>117</sup>

The report also recommended that the Bangladeshi government agencies open a dialogue with relevant KSA government agencies to seek recognition of the newly reformed TVET qualifications, with particular emphasis on the construction industry.<sup>118</sup> Further recommendations for pilot activities include gathering and publishing information on labour markets in KSA, establishing an RPL centre for existing migrant workers in KSA, and establishing a centre of excellence in Bangladesh to train and certify migrants workers with a direct focus on providing skilled workers to the construction industry in KSA.<sup>119</sup>

In addition, a recent GIZ/ILO report highlighted a number of considerations relevant for connecting TVET systems with migrant labour needs across the GCC region. These factors include developing a system in which migrant workers' skills can be tested, certified and recognised in both their destination country and country of origin, as well as developing a system of mutually recognised skills and qualifications for migrants with prior TVET experience.<sup>120</sup> Working with employers' organisations and recruitment agencies is also seen as critical to developing (and recognising) workers' vocational skills.<sup>121</sup>

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### 7.2 Attitudes towards an RPL Test

More than half of construction employers (55%) believe that an RPL test for Bangladeshi migrant workers would be fairly or very useful to their firms. It should be highlighted, however, that almost a third (28%) would find such a test either not at all useful or only slightly useful, so it would be unlikely to be adopted wholesale by employers.<sup>122</sup>

Some qualitative data casts light on the reasons behind a lack of acceptance for the RPL Test. One employer said that the test wouldn't be needed for his firm, which ran its own in-country tests for Bangladeshi

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<sup>115</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

<sup>116</sup> Ibid.

<sup>117</sup> Ibid.

<sup>118</sup> Ibid.

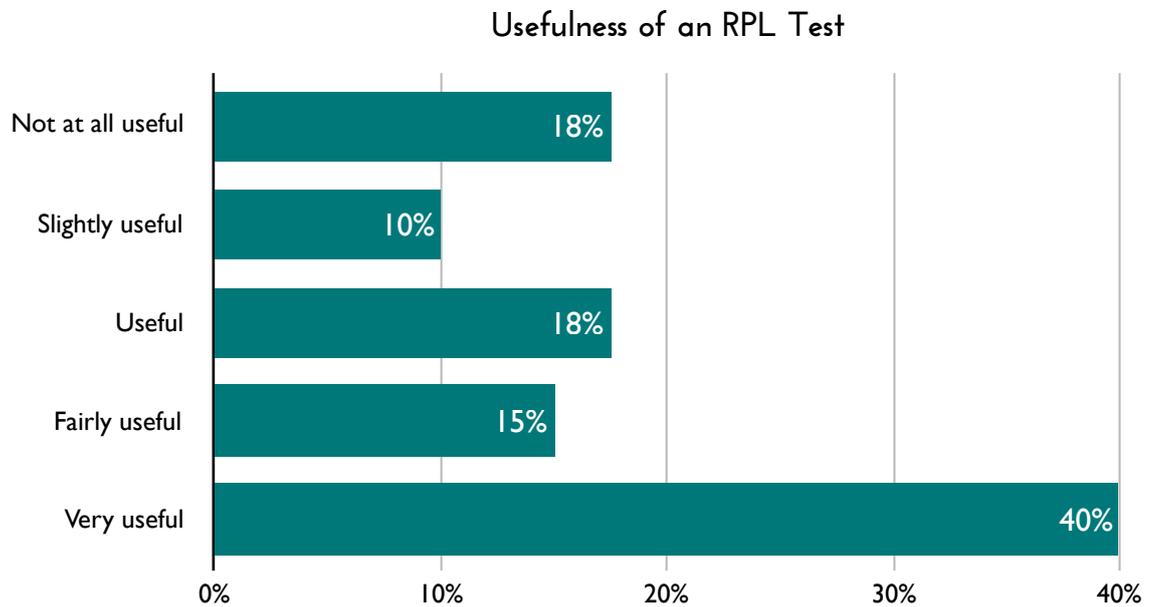
<sup>119</sup> Ibid.

<sup>120</sup> Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and International Labour Organization (ILO), (2015), Labour Market Trends Analysis and Labour Migration from South Asia to Gulf Cooperation Council Countries, India and Malaysia.

<sup>121</sup> Ibid.

<sup>122</sup> Labour market survey.

workers. Another had concerns regarding whether the test would 'increase the cost of Bangladeshi workers'.<sup>123</sup>



Employers were also asked, more broadly, what changes would encourage them to hire more highly skilled Bangladeshi workers. It was apparent that negative perceptions of Bangladeshi workers were a major barrier. Participants referred to cultural differences between Saudis and Bangladeshis: 'they should do training courses also about the culture and life style in Saudi' and the linguistic skills of Bangladeshis as major barriers to be overcome.<sup>124</sup>

## 7.3 Key Findings

- Challenges in introducing an RPL programme include engaging migrant workers in training (rather than taking available job opportunities) and persuading recruitment agencies and employers of the value of the training and certification.
- More than half of employers believe that an RPL test for Bangladeshi migrant workers would be useful or very useful to their companies; it should be noted, though, that nearly a third felt that such a test would not be useful at all or only slightly useful.
- Negative perceptions of an RPL test may relate to the current practice of some firms conducting their own skills tests, and also concerns that such skills tests would increase the salary costs of Bangladeshi workers.

<sup>123</sup> Labour market survey.

<sup>124</sup> Ibid.

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## 8. Conclusions

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### 8.1 Key Findings

The construction sector in KSA currently presents significant opportunities for migrant workers: it has grown steadily in recent years and it primarily uses foreign labour. The reliance on migrant workers, however, is perceived by construction employers to be diminishing, with the majority of employers consulted for this study anticipating a smaller proportion of migrant workers in the future. This presents a particular challenge for Bangladeshi workers, who, with the recent lifting of a travel ban, have begun to enter the country in significant numbers again.

Bangladeshi workers are frequently described by employers as having little or no bargaining power. They are paid less than other migrant workers, and have little training or skills. Bangladeshi workers are also perceived to have poor communication skills and cultural awareness. There are also allegations of untrustworthiness, possibly linked to the need for some Bangladeshi workers to seek additional work illegally, in order to afford repayment of recruitment and relocation costs. Employers using Bangladeshi migrant labour tend to do so because of the low pay that the workers are willing to accept; the low pay that they receive, however, creates and perpetuates the conditions in which supplementary income is sought in order to repay debts.

It is not enough for Bangladeshi migrant workers just to improve their skills and quality levels, however. There is a need to convince employers of the usefulness of Bangladeshi workers over and above other migrant worker nations; the migrant ban forced many employers to find alternate sources of migrant labour, and they may be unwilling to change these arrangements now. In order to compete effectively with other nations, Bangladeshi workers will need to address the following issues: the perception or reality of low quality qualifications and certifications; the perception or reality of low skills levels; the willingness to accept low pay and poor working conditions; and the lack of cultural awareness and language skills.

The charges of low quality, low skills levels, and the acceptance of low pay and poor conditions can all be addressed to some extent by the introduction of standardised RPL testing in Bangladesh. An RPL test would be welcomed by the majority of employers, and would overcome the serious challenge presented by employer scepticism of Bangladeshi qualifications and skills. Implementing the skills test alone is not sufficient, however, to ensure that it has the maximum positive impact; it must be complemented by significant stakeholder engagement activity at policy and industry level. Employers need to be convinced of the efficacy of the test and the reliability of the certification; it would need to be sponsored by the relevant government quality assurance body as a minimum. Employers would also need to be convinced of the value of paying a higher premium for Bangladeshi skills.

It is essential that a robust skills development programme is delivered in parallel with the RPL and testing regime prior to migrant worker departure; while it is out of scope for this research to define the specifics of any skills development programme required in Bangladesh, we would refer readers to the recent IOM report on 'Maximising the Potential of Labour Migration Through Skills Development and Certification' which addresses the issues in detail.<sup>125</sup>

Significant work would also need to be done with migrant workers to ensure that they understand the importance of the test in terms of raising their profile, pay and also changing employer perceptions. Encouraging aspirations towards higher skills and higher positions is also recommended. One of the

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<sup>125</sup> Carroll, G. (2016), Maximising the Potential of Labour Migration Through Skills Development and Certification, Internal Report, International Organisation for Migration (IOM).

challenges for policymakers, additionally, is how to encourage workers, who may be faced with an immediate opportunity for employment under poor conditions and pay, to forego these opportunities and rely on RPL (and possibly further training) in the hope of securing better paying employment.

Another area where significant impact on the perception of Bangladeshi workers may be realised is in the development of training modules focusing on cultural awareness and behavioural norms, and, most importantly, workplace Arabic and English. Encouragement of migrant workers to work towards integrating more successfully within the workplace would also help to change perceptions of insularity. The acquisition of such soft skills is vital; validating vocational skills alone is not enough to incite employers to trust, and use, Bangladeshi workers. For skilled workers, there is also scope for further skills development in emerging areas, for example, 'green' construction.

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## 8.2 Recommendations

Key recommendations for actions:

- Ensure that Bangladeshi workers gain a competitive advantage over migrant labour from other nations; this means changing perceptions of skills and behaviour, and also providing value for money in terms of the quality of work output.
- Focus on improving soft skills (cultural awareness, communication and language skills) alongside the development, testing and certification of vocational skills, by providing short training courses for prospective migrant workers, for example, English and/or Arabic for the workplace.
- Engage employers and policymakers in KSA about the value of an RPL test and ensure that their key skills requirements are reflected in the test contents. It may also be useful as a pilot to work with employers to secure work placements for the first cohort of Bangladeshi workers receiving the test certificates, to demonstrate their quality to the employers, and to demonstrate the value of the test to prospective migrant workers.
- Ensure that Bangladeshi migrant workers are aware of the value of an RPL test, as above, and the opportunities it may provide. Providing bursaries for some migrant workers wishing to undertake the RPL test may raise awareness of the test itself and encourage more interest.
- Work with Bangladeshi consular staff in KSA to provide a package of support for migrant workers who find themselves in exploitative or dangerous situations; this support may help to alleviate some of the pressures leading workers to participate in unlawful activities, thus improving the esteem in which they are held by employers and by Saudi society more generally.
- Engage the relevant skills development governance bodies and industry representatives from Bangladesh collaborate with the mega agencies to ensure that the skills requirements and opportunities for Bangladeshi workers are appropriate and legitimate.

## Appendix: Interview Questions

### Employer Survey

1. How many workers are employed by your company at this location?

١. كم عدد العمال التابعين للشركة العاملين في الموقع او الفرع الرئيسي؟

2. And across Saudi Arabia?

٢. وفي المواقع الأخرى في كافة أنحاء المملكة؟

3. To the best of your knowledge, what proportion of employees at your firm are immigrants to Saudi Arabia?

- Less than 10%
- 10% - 20%
- 21% - 30%
- 31% - 40%
- 41% - 50%
- 51% - 60%
- 61% - 70%
- 71% - 80%
- 81% - 90%
- More than 91%

٣. عطفاً على معلوماتك وخبرتك، ماهي نسبة العمالة الوافدة في شركتكم؟

- أقل من ١٠٪
- ١٠٪ — ٢٠٪
- ٢١٪ — ٣٠٪
- ٣١٪ — ٤٠٪
- ٤١٪ — ٥٠٪
- ٥١٪ — ٦٠٪
- ٦١٪ — ٧٠٪
- ٧١٪ — ٨٠٪
- ٨١٪ — ٩٠٪
- أكثر من ٩١٪

4. Of these, what proportion are from....

- Bangladesh?
- India?
- Pakistan?
  
- Less than 10%

- 10% - 20%
- 21% - 30%
- 31% - 40%
- 41% - 50%
- 51% - 60%
- 61% - 70%
- 71% - 80%
- 81% - 90%
- More than 91%

٤. كم نسب العمالة الوافدة من الجنسيات التالية:

- بنجلاديش
- الهند
- باكستان
- 

- أقل من ١٠٪
- ١٠٪ — ٢٠٪
- ٢١٪ — ٣٠٪
- ٣١٪ — ٤٠٪
- ٤١٪ — ٥٠٪
- ٥١٪ — ٦٠٪
- ٦١٪ — ٧٠٪
- ٧١٪ — ٨٠٪
- ٨١٪ — ٩٠٪
- أكثر من ٩١٪

5. What job or job titles are most commonly held by Bangladeshi workers?

٥. ماهو المسمى الوظيفي الأغلّب منحاَ للعمالة البنجلاديشية؟

6. In what other jobs do you employ Bangladeshi workers?

٦. ماهي المهن الأخرى التي يمكن أستقطاب العمالة البنجلاديشية وتوظيفها فيها؟

7. What is the average annual salary for low-skilled construction labourers among the following groups:

- Saudi Nationals
- Migrant workers in general
- Bangladeshi workers in particular

[Researcher to ask first about employers firm: if unsure/unwilling to divulge then ask about in general in Saudi Arabia.  
Tick box to determine which is which for analysis.]

٧. ماهو المتوسط السنوي لراتب العمالة الغير مهارة في قطاع التشييد للجنسيات التالية:

- العمالة السعودية
- العمالة الوافدة بشكل عام
- العمالة البنجلاديشية

8. What is the average annual salary for **entry level masons**:

- Saudi Nationals
- Migrant workers in general
- Bangladeshi workers in particular

٨. ماهو المتوسط السنوي لراتب عمال البناء ذو المهارات المبتدئة للجنسيات التالية:

- العمالة السعودية
- العمالة الوافدة بشكل عام
- العمالة البنجلاديشية

9. What is the average annual salary for **skilled masons**, among the following groups:

- Saudi Nationals
- Migrant workers in general
- Bangladeshi workers in particular

٩. ماهو المتوسط السنوي لراتب عمال البناء ذو المهارة العالية للجنسيات التالية:

- العمالة السعودية
- العمالة الوافدة بشكل عام
- العمالة البنجلاديشية

10. What is the average annual salary for **entry level electricians**:

- Saudi Nationals
- Migrant workers in general
- Bangladeshi workers in particular

١٠. ماهو المتوسط السنوي لراتب الكهربائي ذو المهارات المبتدئة للجنسيات التالية:

- العمالة السعودية
- العمالة الوافدة بشكل عام
- العمالة البنجلاديشية

11. What is the average annual salary for **skilled electricians**, among the following groups:

- Saudi Nationals
- Migrant workers in general
- Bangladeshi workers in particular

١١. ماهو المتوسط السنوي لراتب الكهربائي ذو المهارة العالية للجنسيات التالية:

- العمالة السعودية
- العمالة الوافدة بشكل عام
- العمالة البنجلاديشية

12. What is the average annual salary for skilled construction plumbers, among the following groups:
- Saudi Nationals
  - Migrant workers in general
  - Bangladeshi workers in particular

١٢. ماهو المتوسط السنوي لراتب السباك ذو المهارة العالية في قطاع التشييد للجنسيات التالية:  
- العمالة السعودية  
- العمالة الوافدة بشكل عام  
- العمالة البنجلاديشية

13. a) Which channels do you typically use to recruit **Bangladeshi workers** (tick all that apply)?
- a) New government-registered 'mega' recruitment agencies
  - b) Traditional recruitment agencies
  - c) Online advertisements
  - d) Informal networks
  - e) Other (please specify)

١٣. ماهي القنوات الغالب استخدامها في أستقدام العمالة البنجلاديشية:  
- شركات الأستقدام الكبرى التي تم أعتمادها من قبل وزارة العمل عام ٢٠١٣  
- مكاتب الأستقدام العامة  
- إعلانات المواقع الألكترونية  
- المعارف والعلاقات الشخصية  
- أخرى (أرجو التحديد)

14. How important are each of the following when recruiting for a skilled and semi-skilled construction job:
- a) Saudi qualifications
  - b) KSA recognised qualifications (including those from other countries, such as TESDA or City & Guilds)
  - c) Unrecognised qualifications
  - d) Industrial experience
  - c) Training without certification

5 point matrix (**not at all important, slightly important, important, fairly important, very important**)

١٤. ماهي أهمية المؤهلات التالية عند أستقدام العمالة الوافدة المتخصصة أو شبه متخصصة في أعمال البناء والتشييد (المرجو التقييم لكل خيار من ١ "غير مهم على الإطلاق" الى ٥ "مهم جداً")  
- المؤهلات السعودية المعتمدة محلياً  
- المؤهلات الأجنبية المعتمدة محلياً (تشمل الهيئات والمراكز الأجنبية المعتمدة مثل TESDA و City & Guilds)  
- المنظمات الغير معتمدة  
- الخبرات السابقة في المجال الصناعي

15. What specifically do you look for in terms of qualifications and experience when recruiting skilled and semi-skilled construction workers? -(e.g.5 years+ experience, Qualification in X)

- ١٥) على وجه التحديد ماذا تتظنون اليه من حيث المؤهلات و الخبرة عندما تقومون بتوظيف عمالة بناء ماهرين وشبه ماهرين؟
- مثال (خمس سنوات خبرة )

16. In the next 5 years, how, if it all, would you expect the proportion of migrant employees to change?

*There will be a much greater proportion of migrant employees, relative to non-migrants.*

*There will be a somewhat greater proportion of migrant employees*

*The proportions will be more or less the same*

*There will be a somewhat smaller proportion of migrant employees*

*There will be a much smaller proportion of migrant employees.*

٦) في السنوات الخمس المقبلة، كيف سيكون التغيير في نسبة العمالة الوافدة في شركتك اذا كان هنالك تغيير؟

١- سوف يكون هنالك نسبة ضخمة بكثير من العمالة الوافدة، مقارنة بالعمالة المقيمة

٢- سوف يكون هنالك نسبة كبيرة من العمالة الوافدة.

٣- سوف يكون هنالك نفس النسبة متساوية بين العمالة الوافدة والعمالة المقيمة.

٤- سوف تكون النسبة قليلة.

٥- سوف يكون هنالك نسبة ضعيفة بكثير من العمالة الوافدة.

[ 17.What do you think are the general perceptions of Bangladeshi migrants in the construction industry?

(prompt:working habits/style, willingness to work at certain wages,competence compared to other nationalities )

٢٠) ماهو رايك في التصورات العامة للعمالة الوافدة من بنغلاديش في صناعة البناء والتشييد؟

[١26] (موجه: العمل/ العادات/ النمط، الرغبة في العمل في بعض الاجور والكفاءة مقارنة مع الجنسيات الاخرى؟

18.Our initial research suggests that Bangladeshi workers are more likely to be found in low-skilled construction jobs than more-skilled jobs.Why do you think this is?

١٨) تشير ابحاثنا الاولى، ان العمالة البنغلاديشية هم اكثر عرضة بان يكونوا في وظائف في قطاع البناء التي تتطلب مهارات متدنية اكثر من وظائف التي تتطلب مهارات عالية . لماذا تعتقد ان هذا هو الحال ؟

This question was included in the discussion guide but omitted from the analysis at the request of IOM. <sup>126</sup>

19. Have you observed any differences between Bangladeshi migrants and workers from other countries in your firm ?

(٢١) هل لاحظت اي اختلافات بين الوافدين من بنجلاديش والعمالة من بلدان اخري في شركتكم ؟

20. What impact do you think the lifting of the migrant ban on workers from Bangladesh will have in the medium/long term in terms of:

- (a) perceptions?
- (b) employment?
- (c) skills recognition?
- (d) salaries?

(١٧) ماهو التأثير الذي تعتقده عند حظر العمالة الوافدة من بنجلاديش علي المدى المتوسط والطويل ، من حيث:

أ) رؤيتك ؟

ب) التوظيف؟

ج) الاعتراف بالمهارات.

د) الرواتب.

21. How useful are each of the following types of qualifications/certificates/tests in assessing a worker's suitability for a job ?

Qualifications/certificates/tests that are:

- Stamped by the relevant training institute
- Accredited nationally in KSA
- Accredited in migrants' country of origin

Accredited internationally (i.e. awarded by an independent third party and recognised across country borders )

Not applicable (I don't ask for training certificates) -

(very useful, 2= Moderately useful, 3= not at all useful =1)

(٢٢) ما مدي فائدة كل من الانواع التالية من المؤهلات / الشهادات/ الاختبارات في تقييم ملائمة العامل للعمل

المؤهلات/ الشهادات/ الاختبارات التي هي:

- مختومه من قبل معهد تدبير ذات صلة.

- معتمدة في المملكة العربية السعودية
- معتمدة في بلد العمالة المهاجرة.

-

- معتمدة دوليا (اي منحت من قبل طرف ثالث مستقبلي ومتعرف به في جميع انحاء البلد)
- لا ينطبق (انا لا اطلب الحصول علي شهادات التدريب) (١ = مفيد جدا، ٢ = مفيدة الي حد ما، ٣ = علي الاطلاق ليست مفيدة)

23.a) What organisations can you name that provide certificates to construction workers ?

b) Do you rate any of these organisations particularly favourably?

(٢٣ أ) ماهي المنظمات التي يمكنك تسميتها والتي تقدم شهادات لاعمال البناء؟

(ب) هل انت تقيم هذه المنظمات المعنية بانها اجابية (ومفيدة)؟

24. To what extent do you believe TVET qualifications obtained in Bangladesh are an accurate way of judging the skills of Bangladeshi workers ?

1-5 = not at all, fairly, somewhat, slightly, to a great extent

(٢٤ أ) الي اي مدي تعتقد بان مؤهلات التدريب التقني والمهني TVET

والتي تم الحصول عليها في بنغلاديش هي وسيلة دقيقة للحكم علي مهارات العمالة البنغلاديشية؟

١- ابدا

٢- قليلا

٣- بعض الاحيان

٤- معقول

- غابا

25.) How useful, if at all, would an RPL test for Bangladeshi migrant workers be for your firm? (That is, a test in Saudi Arabia in which migrant workers demonstrate their competence in a particular job.)

- Not at all useful
- slightly useful,
- Useful,
- fairly useful,
- very useful

(٢٥ أ) ما مدي الفائدة ، في اختبار التحقق من المهارات للعمالة الوافدة من بنغلاديش قد يكون في شركتكم؟ (هذا هو اختبار في المملكة العربية السعودية الذين يعني اثبات الكفاءة للعمال المهاجرين في وظيفة معينة)

- ليس مهما علي الاطلاق

- مهم بشكل قليل
- مهم الي حد ما
- جدا مهم.

26. What changes, if any, would encourage your company to recruit more Bangladeshi workers into high skilled roles?

(ب) ماهي التغييرات التي من شأنها ان تشجع شركتكم لتوظيف المزيد من العمالة البنغلاديشية في المناصب ذات المهارة العالية؟

(ج) اختياري، للمشاركين الذين يعرفون المنطقة:- هل يجب ان يكون كل شي بان يكون في مكانه الصحيح لاختبار التحقق من المهارات الازمة ، لكي يكون فعالا؟

مثلا، حملات للعلاقات العامة علي وجهات نظر ومواقف العمالة من بنجلاديش؟

27. Are there any occupations that are likely to have particularly high demand for migrant workers?

(٢٦) هل هنالك اي مهن والتي من المرجح ان يكون لديها ارتفاع طلب بالنسبة للعمالة المهاجرة؟

28. Do you have any other comments?

(٢٧) هل لديك اي تعليقات اخري؟

Is there anyone else you think we should be speaking to?

هل ممكن ان تقترح شخص آخر ان نتحدث له

## Stakeholder Survey

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1. In which specific occupations do migrant workers tend to be employed in the construction sector?

(1) اي من المهن المحدده التي يميل اليها العمالة المهاجرة في قطاع البناء والترشيد؟

2. In the next 5 years, how, if it all, would you expect the proportion of migrant employees in general working in construction in Saudi Arabia to change?

1 - There will be a much greater proportion of migrant employees, relative to non-migrants....5 - There will be a much smaller proportion of migrant employees.

(١) في السنوات الخمس المقبلة، كيف سيكون التغيير في نسبة العمالة الوافدة في شركتكم اذا كان هنالك تغيير؟

١- سوف يكون هنالك نسبة ضخمة بكثير من العمالة الوافدة، مقارنة بالعمالة المقيمة

٢- سوف يكون هنالك نسبة كبيرة من العمالة الوافدة.

٣- سوف يكون هنالك نفس النسبة متساوية بين العمالة الوافدة والعمالة المقيمة.

٤- سوف تكون النسبة قليلة.

٥- سوف يكون هنالك نسبة ضعيفة بكثير من العمالة الوافدة.

3. In the next 5 years, how, if it all, would you expect the proportion of Bangladeshi employees in particular working in construction in Saudi Arabia to change

1 - There will be a much greater proportion of migrant employees, relative to non-Bangladeshi's;...5 - There will be a much smaller proportion of Bangladeshis employees.

٦ (١) في السنوات الخمس المقبلة، كيف سيكون التغيير في نسبة العمالة الوافدة في شركتك اذا كان هنالك تغيير؟

١- سوف يكون هنالك نسبة ضخمة بكثير من العمالة الوافدة، مقارنة بالعمالة المقيمة

٢- سوف يكون هنالك نسبة كبيرة من العمالة الوافدة.

٣- سوف يكون هنالك نفس النسبة متساوية بين العمالة الوافدة والعمالة المقيمة.

٤- سوف تكون النسبة قليلة.

٥- سوف يكون هنالك نسبة ضعيفة بكثير من العمالة الوافدة.

4. What factors led you to choose the answer that you did ?

٤ (٤) ماهي العوامل التي أدت لك باختيار تلك الاجابة ؟

5. What impact do you think the lifting of the migrant ban on workers from Bangladesh will have in the medium/long term in terms of:

a) perceptions (b) employment (c) skills recognition (d) salaries ?

٥ (٥) ماهو التأثير الذي تعتقده عند حظر العمال الوافدة من بنغلاديش علي المدى المتوسط والطويل ، من حيث:

(أ) روية؟

(ب) التوظيف؟

(ج) الاعتراف بالمهارات.

(د) الرواتب؟

6. Our initial research suggests that Bangladeshi workers are more likely to be found in low-skilled construction jobs than more-skilled jobs. Why do you think this is ?

تشير ابحاثنا الاولية، ان العمالة البنغلاديشية هم اكثر عرضة بان يكونوا في وظائف في قطاع البناء التي تتطلب مهارات متدنية اكثر من

وظائف التي تتطلب مهارات عالية . لماذا تعتقد ان هذا هو الحال ؟

7. Bangladeshi workers are more likely to be paid less than those in similar jobs. Why do you think this is?

(٧) العمالة البنغلاديشية هم اكثر عرضة لتكون رواتبهم اقل من الجنسيات الاخرى الموجودة في وظائف مماثلة ؟ لماذا تعتقد ذلك؟

8. a) What, in your view, is the general perception of Bangladeshi workers? (prompt: working habits/style, willingness to work at certain wages, competence compared to other nationalities?)

(٨) ماهو رأيك في التصورات العامة للعمالة الوافدة من بنغلاديش في صناعة البناء والتشييد؟

(موجه: العمل/ العادات/ النمط، الرغبة في العمل في بعض الاجور والكفاءة مقارنة مع الجنسيات الاخرى؟)

8.b) A review of online adverts suggested that Indian and Pakistani nationals were often specified in job adverts but not Bangladeshi workers. - why might this be?

(٩) الاعلانات التي علي الانترنت تقترح ان العمالة من الجنسية الهندية والباكستانية ، غالبا ما تحدد في الاعلانات عن الوظيفة ، ولكن ليس العمالة من الجنسية البنغلاديشية، لماذا؟

9. What can be done to address any negative perceptions of Bangladeshi workers?

(٩) ما الذي يمكن عمله للتصدي ومعالجة أية تصورات سلبية عن العمالة البنغلاديشية؟

10. How receptive do you believe employers in Saudi Arabia are to internationally accredited qualifications? (i.e. awarded by an independent third party and recognized across national boundaries)

كيف سيتقبل ارباب العمل في السعودية للمؤهلات المعتمدة خارجية او دولية

(المثال : منح من طرف الثالث ومعترف بهي داخل حدود وطنية )

11. To what extent do you think an internationally accredited qualification would enable Bangladeshi workers to find higher paid work? [1 to 5 rating: not at all > very much]

ما مدى احتمالية ان المؤهلات معتمدة العالمية تمكن العمال البنغلاديشيون ان تعمل في وظائف رواتب عالية

12. What particular sending countries are recognised as being of value in Saudi Arabia?

ما هي البلدان المصدرة للعمالة الوافدة والتي تعتبر نومهاارة عالية ومرغوبة فبالسوق السعودية(قطاع البناء)

13. In your view, how valuable would an RPL test for Bangladeshi migrant workers be? (That is, a test in Saudi Arabia in which migrant workers demonstrate their competence in a particular job.)

فى نظركم ما هي اهمية الامتحان التّحقق من مهارات العمال الوافدين من بنغلاديش  
مثال: الامتحان فى السعودية حيث تظهر العمال مهاراتهم

14. What factors do you think would need to be taken into account when developing such a test?

ما العوامل التى يجب ان تؤخذ فى الحسبان عند تطوير تلك الاختبارات

15. Is there anything that would need to be in place first for the RPL test to be effective?

هل هناك اي شئى تحتاج لوضع فى البداية الامتحان لتزيد من فعالتيه وتأثيره

16. Are there any occupations that are likely to have particularly high demand for migrant workers?

٢٦ هل هناك اي مهن والتي من المرجح ان يكون لديها ارتفاع طلب بالنسبة للعمال المهاجرة؟

Is there anyone else you think we should be speaking to?

هل ممكن ان تقترح شخص آخر ان نتحدث له

Any other comments?

أي تعليقات اخرى

## Employee Survey

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1. What is your job title?

ما هي وظيفتك

2. What is your salary?

[Option of per month, per year, per week or per hour]

كم راتبك الحالي

( شهريا ..... سنويا ..... اسبوعيا.... )

3. How many hours do you work per week?

كم عدد ساعات العمل في الأسبوع

4. In general what differences are there, if any, in the kinds of jobs held by workers from Bangladesh compared to other migrants to Saudi Arabia?

عموما ما هي الفوارق فى الوظائف التى يؤديها العمال البنغلاديشية مقارنة الوافدون الاخرى فى السعودية

5. In general what differences are there, if any, in the kinds of salaries earned by workers from Bangladesh compared to other migrants to Saudi Arabia?

عموما ما هي الفوارق في الرواتب التي يحصل عليه العمال البنغلاديشية مقارنة الوافدون الاخرى في السعودية

6. What, if anything, do you think makes it harder for Bangladeshi workers to gain skilled construction work in KSA?

مالذي يجعل الامر صعب للعمال البنغلاديشيون ليحصل الوظائف التي تطلب مهارات العالية

7. Are Bangladeshi workers treated differently, differently from workers from other countries? If yes, how?

هل يعمل العمال البنغلاديشيون يعاملون بشكل مختلف من الاخرين ولماذا

8. To what extent do you feel that Bangladeshi qualifications are recognised and valued by Saudi employers?

الى أي مدى تشعر بان ارباب العمال السعوديين يعترفوا للقدرات والمهارات العمال البنغلاديشية

9. The organisations that have commissioned this research are considering developing a skills test for migrant workers in Saudi Arabia, which would provide migrant workers with a certificate to recognise their prior learning outside of the country.

المنظمة تعمل حاليا لوضع برنامج تحقق المهارات للوافدين في السعودية ان يوفر شهادات للعمال الوافدين

لكي تعتمد دراساتهم السابقة خارج المملكة

How useful do you think a test like this would be for you and other Bangladeshi workers?

1-5 scale

كيف سيكون هذا الاختبار مفيدا لك و للعمال البنغلاديشيون الاخرين (سلم من واحد الى خمسة)

10. How do you feel about the opportunities available for Bangladeshi workers in construction?

كيف تشعر حيال الفرص المتاحة في قطاع صناعة البناء للعمال البنغلاديشيون

11. Are there opportunities for promotion in your current job? Which jobs, if any, could you move into from your current job? Would you need additional training to do that job?

هل لديك فرص الترقية في العمل الحالي. ما الوظائف التي يمكنك للانتقال اليها. هل تحتاج تدريب اضافي لهذه الوظيفة