International Organization for Migration (IOM)
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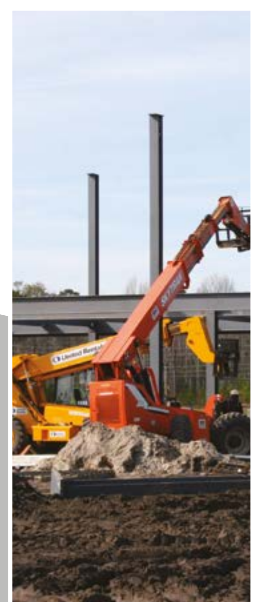
LABOUR MARKET TRENDS & SKILLS PROFILES OF SRI LANKAN MIGRANT WORKERS IN THE CONSTRUCTION INDUSTRY IN GCC COUNTRIES



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| FOREWORD

Over the past forty years, Sri Lankans have been increasingly migrating to the Gulf Cooperation Council (GCC) countries in search of employment. The demand for migrant labour in the GCC is projected to grow in the coming decade, especially in the construction sector. The potential benefits of labour migration are manifold. For the GCC countries, migrants contribute to their growth, while Sri Lanka benefits from repatriation of earnings, skills and knowledge. However, in order to fully reap these benefits, a rigorous international collaboration in the region is crucial to ensure fair migration that reflects the fundamental rights of workers, results in decent work and meets the demands of the labour market.

This report specifically focuses on skills of migrant workers, in particular in the construction sector. Based on a trend analysis, the report reveals that there is an extensive gap in the skills that are supplied and those that are in demand. This issue has two dimensions. First, there is an overall shortage in the supply of labour from Sri Lanka. Second, the migrants do not have the skill-sets or qualifications that are in demand. The report further lays out possible factors that are exacerbating this gap and presents policy recommendations that address these identified factors.

This report was commissioned by the International Labour Organization (ILO) as part of a project on "Enhanced recognition of skills and reduced vulnerability of Sri Lankan construction workers in selected GCC countries." This project is a sub-component of a regional project of the International Organization for Migration (IOM) on "Strengthening Labour Migration Governance through Regional Cooperation in Colombo Process Countries," which is funded by the Swiss Agency for Development and Cooperation.

This report is closely aligned with the priorities of the Government of Sri Lanka and the governments of the GCC countries. Furthermore this report contributes to the regional and inter-regional dialogue taking place under the auspices of the Colombo Process, Abu Dhabi Dialogue and other platforms. Collaboration to ensure the portability of skills is also featured in the Bali Declaration from the ILO Asia-Pacific Regional Meeting in 2016, and will certainly be reflected in the deliberations around the Global Compact on Safe, Regular and Orderly Migration.

Ultimately, we expect that this study guides and facilitates further dialogue and synergy among governments and other stakeholders to more effectively match workers and employers. The recognition of skills can lead to improved employment opportunities and mobility, better wages and working conditions, and higher productivity. The analysis on the trends, demands, and current systems of labour migration may also serve as guidance for how new labour market entrants can enhance their employability and preparedness for their journey in search of decent work abroad.

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Many organizations and individuals have contributed towards the development of this study. The ILO would like to thank the institutional representatives of the Government of Sri Lanka, IOM Sri Lanka Office and the SDC Sri Lanka Office.

Furthermore, the ILO would like to especially note that this project would not have materialized without the effort and contribution by Mr. Andrea Salvini, who has authored this paper with the support of Ms. Magdalena Ulceluse. Additionally, sincere appreciation goes to Ms. Thilini Fernando, for her support as the Focal Person for the Migration Skills Project, Ms. Pramodini Weerasekera, Mr. Nilim Baruah, Mr. Max Tunon, for their inputs and guidance, and Ms. Azusa Hitotsuyanagi for editing the study.

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BIM	Building Information Modeling
CBT	Competency Based Training
CETRAC	Construction Equipment Training Center
CGTTI	Ceylon-German Technical Training Institute
CIDA	Construction Industry Development Authority
CO	Country office
CSCT	Colombo School of Construction Technology
DTET	Department of Technical Education & Training
GCC	Gulf Cooperation Council
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (German International Development Organization)
ICT	Information & Communication Technician
ICTAD	Institute for Construction Training and Development
ICTRL	International Centre for Training of Rural Leaders
ILO	International Labour Organization
IOM	International Organization for Migration
ISCO	International Standard Classification of Occupations
ISM	Industrial Sewing Machine
LMI	Labour Market Information
LMIS	Labour Market Information Systems
KSA	Kingdom of Saudi Arabia
MFEPW	Ministry of Foreign Employment Promotion and Welfare
MoU	Memorandum of Understanding
MSDVT	Ministry for Skills Development and Vocational Training
MYASD	Ministry of Youth Affairs and Skills Development
NAITA	National Apprentice & Industrial Training Authority
NGO	Non-Governmental Organization
NVQ	National Vocational Qualification
NYSC	National Youth Service Council
OTC	Construction Equipment Operator Training Centre
PREAs	Private Employment Agencies
RICS	Royal Institution of the Chartered Surveyors
SLBFE	Sri Lanka Bureau of Foreign Employment
SLIOP	Sri Lanka Institute of Printing
TVEC	Tertiary and Vocational Education Commission
TVET	Technical Vocational Education and Training
UAE	United Arab Emirates
UK	United Kingdom
UNIVOTEC	University of Vocational Technology
VTA	Vocational Training Authority

EXECUTIVE SUMMARY

International labour migration, if properly regulated and managed by both the country of origin and receiving countries, has the potential to reap extensive benefits for the migrants, their communities, and their employers. Sri Lanka is one of the economies around the world whose development has benefited from the remittances of migrant workers, the majority of whom have sought employment in the Gulf Cooperation Council (GCC) countries. These destination countries, at the same time, are as reliant on foreign labour force to meet the ever more growing market demands especially in the construction sector.

This labour market trend analysis, however, reveals the nature of the existing skills mismatch of migrant workers in the construction sector. Compared to the level of demand in GCC countries, there is an overall shortage of migrant workers from Sri Lanka and these migrants are often unskilled or are not equipped with skill sets that are in demand. If Sri Lanka could gear towards supplying the GCC countries with a greater number of migrants who are skilled in professions that are in demand, migrant workers may be able to enjoy greater level of economic returns and other benefits. Hence, based on the trend analysis, the report provides policy implications on how the Sri Lankan government and relevant stakeholders can better accommodate the market demands, increase the employability of the migrant workers, and maximize the economic benefits of migration.

Overall patterns of Sri Lankan labour migration to the GCC countries

In 2015 alone, more than 260,000 Sri Lankans migrated for work (provisional; SLBFE, 2015). The majority of them were male (66 per cent), young (48 per cent in the 20-34 age bracket). In terms of skills profile, the majority of the migrants were unskilled (36 per cent) in 2014 (SLBFE, 2015).

In respect to recruitment, the majority of Sri Lankan migrant workers seek employment through recruitment agencies (59 per cent) (SLBFE, 2014). Despite the efforts made by the Sri Lankan Government to regulate the recruitment agencies, some issues remain, including gaps in the transparency and accountability of agencies and other intermediaries, and unauthorized imposition of high fees on migrants by unscrupulous agencies.

The majority of Sri Lankan migrants seek jobs in the GCC countries. In fact, the top four countries of destination - Saudi Arabia, Kuwait, UAE and Qatar - alone hosted more than 84 per cent of all Sri Lankan labour migrants in 2015 (SLBFE, 2015). GCC countries are equally dependent on migrant workers. For example, more than 90 per cent of the labour force of Qatar are of migrant workers (Ernst and Young, 2014; World Bank Indicators, 2016). Furthermore, in many of the GCC countries, the construction sector is the largest employer of migrants. Despite the recent movement toward nationalization in certain States to counter a high youth unemployment rate, demand for migrant labour is unlikely to decrease considering the increasing investment in the construction sector. The report looks at the overall situation in the region as well as providing national-level analysis for each of the six GCC States.

Skills mismatch

In 2012, less than 25 per cent of the job vacancies in the construction sector targeting Sri Lankan migrant workers were filled (ICTAD, 2014). Due to the nature of the job, the construction sector in the GCC countries struggle to attract sufficient number of migrant workers from Sri Lanka. One explanation as to why the country is not sending enough migrants is because the demand for construction workers within Sri Lanka is rising (ILO, 2015). However, more importantly, the Sri Lankan society, experiencing high economic growth and increasing level of education, does not value highly construction-related work as it is predominantly a blue-collar job. Even though the GCC countries aim towards a knowledge-based economy, the construction sector continues to rely on manual labour rather than technologically-based practices (GIZ/ILO, 2015). This demand for low-skilled workers discourages Sri Lankan migrants from investing in skills trainings that may further enhance their employability. This cannot be more apparent than the low enrollment and completion rates of construction-relevant vocational training courses (ICTAD, 2014). In terms of enrollment rate, only 800 people enrolled in construction-related courses, whereas more than 2,500 people enrolled in the Information Communication Technician (ICT) course.

Another important aspect that is exacerbating the skills mismatch is the quality of the vocational training provided. The curricula of construction-related vocational training courses at times do not encompass the specific skills sets that are demanded in the GCC countries (SLBFE, 2013). Furthermore, the qualifications earned in Sri Lanka are often not accepted in the GCC countries. Even among the GCC countries, qualification criteria and frameworks are not standardized.

Recommendations

The recommendations, based on the findings of the current labour market trends, are meant to inform strategies for both Sri Lanka and the GCC countries to implement to address the existing skills-mismatch in the construction sector. The following is a summary of the key recommendations:

1. Improvement of Labour Migration Information System (LMIS)

The current LMIS system should be adjusted in order to better capture the labour market trends by collecting data on demographic and occupational backgrounds of migrant workers as well as labour demands. Furthermore, Sri Lanka and the GCC countries need to better coordinate in order to standardize data collection to enable and simplify cross-country comparisons. In terms of analyzing labour demands, Sri Lanka needs to make better use of big data analytics to minimize bias and data collection errors. As to better enable evidence-based policy making, it is recommended to collect more policy-oriented data.

2. Strategic bilateral partnerships by type of migration

Sri Lanka may target Saudi Arabia, Qatar and UAE to send high skilled workers in the construction sector. In order to reduce recruitment costs, the destination countries should offer incentives to employers to increase the duration of migration.

3. Skills for construction and institutional agreements

Studies and assessments should be conducted in order to identify key skills that are highly in demand in the construction sectors in the GCC countries to better design and orient existing skills training and skills-recognition schemes. Such refinements of trainings and schemes would ensure greater benefits and fairer pay for migrant workers. Furthermore, Sri Lanka should develop a mechanism to better transfer and absorb the know-how of returning migrants to modernize the construction sector within the country.

4. Improving the TVET system

Impact assessments and studies should be conducted to better understand the how current skills trainings can better attract and retain trainees and at what point and to what extent the migrants are levied recruitment costs by intermediaries. These assessments should contribute to develop Competency Based Training curricula and develop a regulatory framework for Private Employment Agencies (PREAs).

1. Filling the information gap: analysis of labour market trends and skills demand and supply

The Gulf Cooperation Council (GCC) countries have been top destinations for Sri Lankan migrant workers over the past 40 years. The economic boom of the 1970s set these countries on a road of rapid economic development. Furthermore, substantial population growth has increased the demand for and investments in infrastructure and housing. As a result, the construction sector has become one of the fastest growing industries in the region, attracting the highest share of foreign labour force in many of the GCC countries.

Foreign employment has largely benefited the Sri Lankan economy. It has decreased unemployment rates and provides a source of household income for many. The buoyant inflow of remittances significantly contributed to the recovery of Sri Lanka's balance of payments and appreciation of its exchange rates. Thus, under adequate working conditions and protection of human rights, labour migration can bring benefits to both the country of origin and destination.

However, there has been a lack of harmonization between the skills provided by Sri Lankan workers and the skills demanded by the construction sector in the Gulf. The causes for this mismatch is three-fold. First, there is a lack of information on general labour market trends and skills demands. Second, the general skill level of Sri Lankan migrants are insufficient or inadequate. Third, qualifications attained in Sri Lanka are, in many cases, not recognized in the GCC countries.

Hence, the purpose of this study is to provide an overview on the current trends in Sri Lankan's labour migration and skills demand in the construction sector in the GCC countries. Furthermore, the study will identify the professions within the construction sector in the GCC that are high in demand and examine the extent to which those demands are met by Sri Lankan migrants. The study also explores possible factors that lead to this skills gap and the policy implications. Moreover, the intention of the study is to propose ways for Sri Lanka and the GCC countries to better harmonize their migration policies. In doing so, the study aims to facilitate discussion among policy makers within Sri Lanka on how to better recruit and train the migrant labour force.

2. Rationale, methodology and limitations

Despite the overall trend toward nationalization of industries and labour markets in the GCC countries and the relative slowdown in investments in the construction sector, demand for foreign workers in the construction sector is expected to continue well into 2025 (GIZ/ILO, 2015). For the foreseeable future, no radical shifts in technology and work processes are envisaged (PWC, 2017). Hence, the skills and qualifications needed are expected to be similar to the ones already in demand, that is, a high proportion of skilled and unskilled workers, and a relatively low proportion of professionals.

Research for this study was conducted from January to November 2016. The analysis of this study was based on secondary data and desk research of relevant literature. Though there has been increasing efforts to collect more data on the labour market and migrant population, the amount of information available in the GCC countries is limited and inconsistent (Baldwin-Edwards, 2011; ILO, 2015). This limitation has affected the analysis of this study to comprehensively cover labour market trends and employment situation of migrant workers in the GCC countries.

3. Organization of the report

Chapter 2 maps the Sri Lankan labour migration trends in respect to demographic and skills profiles of migrants, recruitment practices and vocational training systems. Chapter 3 provides an overview on the demand for migrant labour in the GCC countries. Chapter 4 provides an in-depth analysis of the mismatch between supply and demand of labour in each of the six GCC countries. Lastly, Chapter 5 concludes the report with a number of specific recommendations on how governments and relevant stakeholders may collaborate to maximize the benefits of migration for all the parties involved.

Chapter 2 | Overall patterns of Sri Lankan Labour Migration

1. Demographic and skills backgrounds of Sri Lankan migrants

Significant regional differences in terms of socio-economic development in Sri Lanka have led people to migrate locally or internationally. For the year 2015, for which the latest, provisional data is available, the Sri Lanka Bureau of Foreign Employment (SLBFE)[1] estimated that 263,307 Sri Lankans have emigrated. This is equivalent to 3 per cent of the total 8 million active labour force in the country. Furthermore, this roughly marks a 17-fold increase from the year 1986, when only 14,456 were recorded leaving the country for work.

Among the Sri Lankans that migrated in 2015, 66 per cent were male. Furthermore, the migrants were mostly young; 48 per cent being in the 20-34 age bracket, while only 9 per cent of individuals were older than 50 years of age. Women and men present different patterns of migration for employment, and this cannot be more evident in terms of age and skills background. While the majority of the male migrants fell in the age cohort of 20 to 34, female migrants tend to be older, between the ages of 30 and 49. Moreover, while there were more male migrants than females in the age group of 20-39, women outnumbered men in the age group of 40 and older. Men, more than women, tend to seek employment in low-skilled and labor-intensive jobs. On the other hand, Sri Lankan women migrate for domestic work, with 81 per cent migrating as domestic workers in 2015, and less than 1 per cent as professionals, overall, more than 90 percent migrate as unskilled workers or housemaids (SLBFE, 2015).

A possible explanation for why women tend to migrate later in their lives than men, is the Circular 13/2013 that was adopted in June 2013 and its subsequent update in December 2013[2]. The Circular cites that the migration and absence of mothers can have potential negative impacts on their children's development and welfare. Hence, the Circular recommends women with children less than five years old to obtain Government clearance prior to migration. It additionally recommends that migrating women with children of five years and older to make childcare arrangements prior to their departure (Weeraratne, 2014).

In regards to skills, less than 2.5 per cent of Sri Lankan migrant workers were professionals (with females representing only 7 per cent of this skill group) (SLBFE, 2015). The majority is categorized either as unskilled (29 per cent) or skilled workers (31 per cent), pointing to an existing high demand for unskilled migrant workers. The available manpower from Sri Lanka covers a wide spectrum of skills and disciplines, with occupational classes ranging from professionals to technicians, clerical officers, up to unskilled occupations such as laborers.[3]

2. Recruitment practices

In 2016, there were 1,510 recruitment agencies registered with the SLBFE. The majority of Sri Lankans (59 per cent in 2014, 62 percent in 2013 and 2012) migrates through these recruitment agencies, as opposed

[1] Sri Lanka Bureau of Foreign Employment is the main national agency regulating out-migration.
[2] The document is a joint effort of the Ministry of Foreign Employment Promotion and Welfare and of the Sri Lanka Bureau of Foreign Employment.
[3] The list includes the following occupations: Engineers, Accountants, Architects, Doctors, Teachers, Lawyers, Bankers, Hotel / Restaurant personnel, Receptionists, Nurses, Paramedics, Computer Operators, Programmers and System Analysts (SLBFE). Other occupations include Machine Operators, Factory Workers, Welders, Fitters, Motor Mechanics, Heavy-Duty Vehicle Drivers, Dockyard Workers, Telecommunication Technicians, Seamen, Labourers and Domestic Workers

to using networks or other private means (SLBFE, 2015). The figures seem to have changed for 2015, however, for which the provisional numbers show only 44 per cent of Sri Lankans migrating through agencies. However, the overall long-term trend in the past decades depicts otherwise. A possible explanation for this preference among migrant workers to rely on recruitment agencies is that they generally tend to believe that these agencies provide a higher level of insurance against precarious jobs and human rights abuses (ILO, 2016).

According to the SLBFE Amendment Act No.56 of 2009, the recruitment agencies in Sri Lanka are now legally entitled to charge the actual costs of the migration process. In theory, this Act applies a ceiling on how much agencies can charge to both employees and employers. The costs that are borne by the migrant depends on how much the employers are willing to cover, which tends to depend on the professional-level of migrants. While employers often cover the majority, if not all, of the associated costs for professional-level migrants, lower-skilled migrants tend to pay noticeable recruitment fees, especially if this is appraised relative to their salary levels (GIZ/ILO, 2015). The Act failed to reduce overcharging of fees by the recruitment agencies (ILO, 2013). Similar outcomes have been observed in other countries that have set caps on recruitment fees. For example, a report on recruitment practices and migration costs to Qatar (Jureidini, 2014), reveals that Sri Lankan migrants typically pay between USD 145 to 840.[4] This amount should be considered in relation to the SLBFE ceiling on registration fees – USD 100 - and that the minimum monthly wage in Sri Lanka for a skilled worker in the services sector – USD 62 (9,500 LKR) (Wage Indicator, 2017).

3. TVET – Structure and trends

The public sector plays a key role in providing vocational training in Sri Lanka. The main institution responsible for vocational education and training is the Ministry of Skills Development and Vocational Training, under whose purview are 11 other main institutes. The Tertiary and Vocational Education Commission (TVEC) is the main regulatory and other institutes include the Department of Technical Education and Training (DTET), the Vocational Authority of Sri Lanka and the University of Vocational Technology (UNIVOTEC). Table 1 lists all the institutes as well as the number of training centres each institution has and the kind of courses that they offer.

[4] This amount covers for commission fee (USD 230), airfare fee (USD 380), sub-agent fee (USD 190) and a medical and police report (USD 40). Additionally, intermediary labour supply agencies can charge up to USD 1,350 to the migrant workers upon arrival in the country of destination.

Table 1 Institutional capacity – TVET

Institution	No of Centres	No of Courses		No of Employees	
		Part Time	Full Time	Academic	Non Academic
Department of Technical Education & Training (DTET)	38	15	76	409	1951
Vocational Training Authority (VTA)	261	38	86	1165	637
National Apprentice & Industrial Training Authority (NAITA)	85	4	91	112	524
National Institute of Business Management (NIBM)	4	98	82	37	117
University of Vocational Technology (UNIVOTEC)	1	17	7	41	111
Ceylon-German Technical Training Institute (CGTTI)	2	32	9	142	70
National Youth Services Council (NYSC)	40	-	31	-	-
Youth Corps	36	-	2	369	169
Youth Services Ltd.	1	-	-	5	1
National Institute of Fisheries and Nautical Engineering	8	7	17	10	192
Sri Lanka Institute of Printing (SLIOP)	2	20	1	30	4
International Centre for Training of Rural Leaders (ICTRL)	1	1	4	13	48

Source: Most recent information available in June 2017. Official website of the State Ministry of Youth Affairs, Sri Lanka.

Registering with TVEC is compulsory for both public and private training providers in Sri Lanka. However, of the total of 1,362 public centres counted in 2015, only 41 per cent of them were registered (Table 2). Among those that were registered, 86 per cent were institutions under the aegis of the Ministry for Skills Development and Vocational Training (MSDVT). The situation is similar for private training providers. Out of 1,339 private training institutions, of which 7 per cent were NGO sector training institutions, only 38 per cent of private institutions were registered, and 59 per cent among the NGO centres, for an overall private registration rate of 39 per cent.

Table 2 Public TVET registered with the TVEC

Type of institution	Total no of training centres	No of training centres registered	% of registration
Institutions under the MSDVT	452	390	86
Other Government institutions	910	171	19
Total	1362	561	41

Source: TVEC Report, 2015

There are a number of reasons for which training centres did not register. Over 40 percent of the centers (42 percent for public, 44 percent for private) claimed to not have been aware of the need to register (TVEC Report, 2015). Of the public institutions, 13 percent responded that they cannot meet the requirements of the TVEC with respect to infrastructure and equipment, and the trainers' qualifications (19 percent of the private training providers), while 2 percent were of the view that maintenance and registration is too costly and cannot be met (idem). The Act No. 20 from 1990 governing the national tertiary and vocational education system stipulates that no person or entity should grant certificates without being registered. However, this provision seems to not be enforced widely. Furthermore, information on the repercussions of receiving certificates from unregistered institutions, but not necessarily unaccredited, could not be found.

In terms of training enrollment and performance, the latest TVEC (2015) report estimates 127,271 persons enrolled in the TVEC-registered public institutions in Sri Lanka in 2014, of which 61 per cent were male. Among the training providers in the public sector, the Vocational Training Authority (VTA) attracts the largest number of trainees of all the available institutions (23 per cent). This is followed by the Department of Technical Education and Training (DTET) (18 per cent), the National Apprentice & Industrial Training Authority (NAITA) (17 per cent) and the National Youth Services Council (NYSC) (15 per cent). The private sector attracts substantially fewer trainees, i.e. 51,055, of which 51 per cent were male. A possible reason as to why there is a gap in the number of students enrolled is perhaps due to the difference in the content of the training provided by public and private institutions. Public training providers concentrate more on technical skills usually required by construction sector employers (TVEC, 2015). Meanwhile, private training providers concentrate on soft skills that are usually required for occupations in the service sector.

The completion rates vary substantially, with more than 80 per cent for the public sector while slightly over 50 per cent for the private sector and. In 2014, the number of National Vocational Qualification (NVQ) Certificates awarded to public training institutions has increased from 8,030 in 2010, to 15,301 in 2014, while in the private and NGO sectors, from 2,317 to 9,296, respectively.

In terms of courses, enrolment in construction-related courses is rather low compared to others (Table 3). Overall, courses on Construction Craftsman (Masonry), rank only 13th in terms of the number of students enrolled, although it did rank 8th when considering only the number of men enrolled in the course. The most popular courses among men in 2014 were for Electrician and Wood Craftsman. Although the construction industry is growing in Sri Lanka, it does not manage to attract the number of trainees it needs. A significant reason is the low social status or prestige associated with blue collar jobs (Dundar et al, 2014).

Significant to note is also the gap between men and women enrolment rates in construction-related courses, such as wood craftsman, welder or construction craftsmen. The low female take-up rates are reflected (and in line with) in the relatively low shares of female employment in the construction sector in the GCC countries: only 3.3 percent in Kuwait and 1.2 percent in Saudi Arabia (in 2013), and 2.1 percent in Qatar (GIZ/ILO, 2015) (the data includes all female migrants, irrespective of country of origin).

In terms of completion rate, in 2014, the highest number of NVQ certificates was awarded for the Computer Applications Assistant trainings (15 per cent). This was followed by the Basic Competencies to Work (11 per cent), a training that was almost entirely performed by private institutions; and Electricians (8 per cent). In construction-related occupations, 4 per cent of the certificates were awarded to the Construction

Craftsman (Masonry) trainings, almost 2 per cent to the Construction Equipment Operator trainings and 0.6 per cent to the Construction Site Supervisor trainings.

Table 3 Comparison of enrolment by type of course and gender, 2014

Course Name	Male	Female	Total	Rank
Information & Communication Technician (ICT)	730	1,993	2,723	1
Tailor (Ladies)	78	1,922	2,000	2
Electrician (Domestic)	1,781	26	1,807	3
Beautician	107	1,376	1,483	4
Information & Communication Technology	317	1,028	1,345	5
Hair Stylist	106	1,169	1,275	6
Wood Craftsman (Furniture)	1,128	72	1,200	7
PC Based Application (Part Time)	319	691	1,010	8
Cook	878	44	922	9
Welder	857	23	880	10
ISM Operator	302	549	851	11
Aluminum Fabricator	811	14	825	12
Construction Craftsman (Masonry)	712	97	809	13
Automobile Mechanic	741	4	745	14
Computer Hardware Technician	533	191	724	15

Source: Labour Market Information System, TVEC, 2014

1. Overall trends on demand and skills level

The top five countries of destination for the period 2010-2015 include four of the GCC countries, which together account for more than 80 per cent of the outflows in 2015 (Table 4) (SLBFE, 2015). In fact, Saudi Arabia and Qatar alone, two of the most dynamic oil-dependent economies, account for more than half of the Sri Lankan emigration between 2012 and 2015.

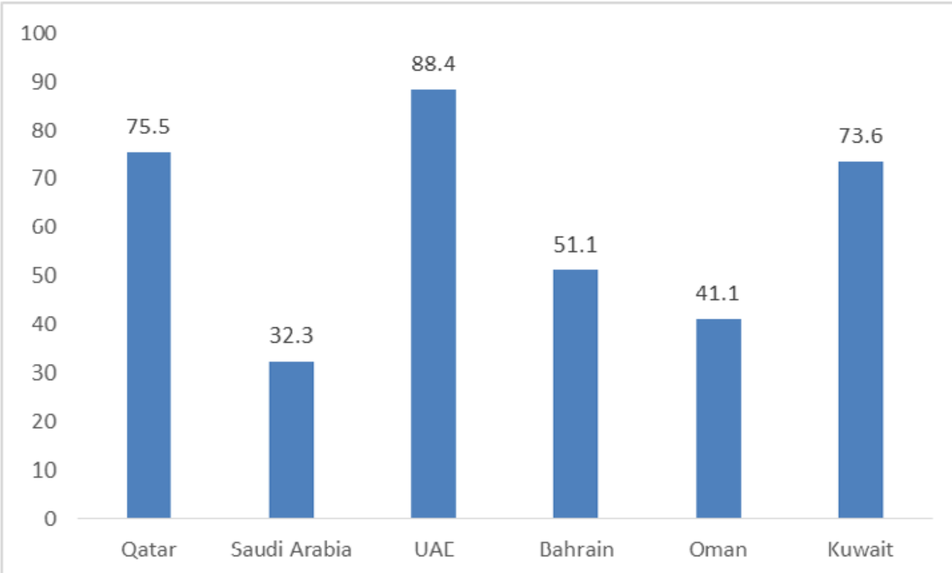
Table 4 Top 10 countries of destination 2010-2015 by percentage

Country	2010	2011	2012	2013	2014	2015*
Saudi Arabia	26.48	26.07	34.68	27.59	26.76	28.45
Qatar	20.44	20.06	20.36	27.53	28.15	24.73
U.A.E.	15.82	14.95	13.56	16.54	16.71	16.56
Kuwait	17.98	19.26	15.66	14.58	14.49	14.60
Lebanon	2.27	1.96	1.40	1.21	1.02	0.99
Jordan	3.52	4.99	3.68	2.41	2.06	1.82
Oman	2.38	2.05	1.73	1.81	1.91	2.69
Bahrain	2.64	2.06	1.61	1.55	1.32	1.41
Maldives	1.56	1.59	1.43	1.19	1.48	1.83
Cyprus	1.04	1.15	1.02	0.55	0.55	0.60

Source: SLBFE (2015) *provisional

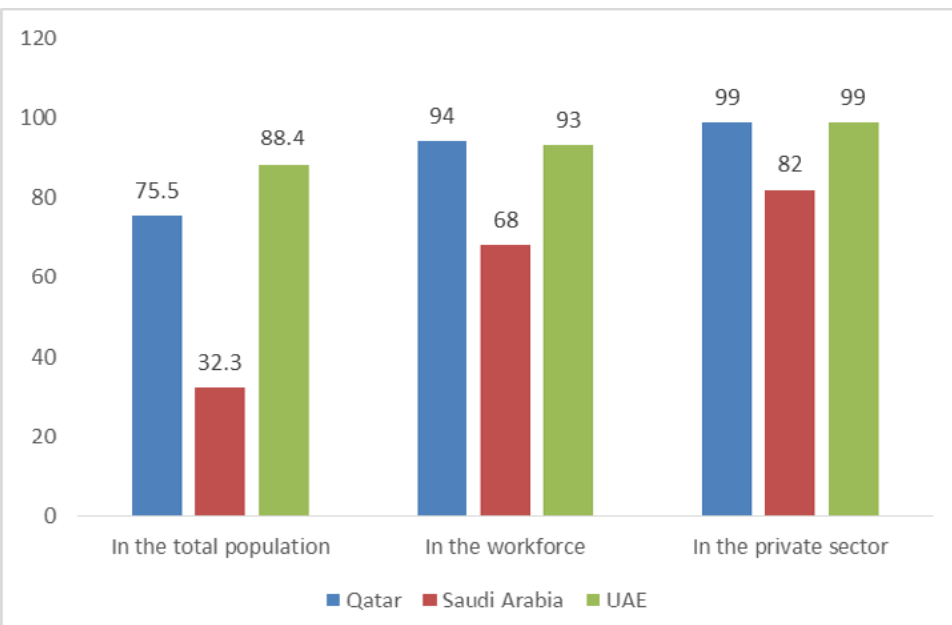
The GCC countries have relied and will continue to rely on migrant workers to support economic activities (Figure 1). The latest data available suggests that migrants make up the majority of the total population except in Oman and Saudi Arabia, and an even greater share of the active labour force population and the population working in the private sector (Figure 2).

Figure 1 Share of migrants in the total population, 2015



Source: World Bank Indicators, 2016

Figure 2 Share of migrants in selected GCC countries, 2013



Source: Ernst and Young, 2014; World Bank Indicators, 2016
Note: data for the total population is for the year 2015

A high youth unemployment has led some of the GCC countries to implement and promote nationalization polices to create jobs for the national population and reduce the over-reliance on migrant labour. An example is Saudi Arabia's Nitaqat Law, which promotes Saudization and penalizes companies that do not meet the quota of Saudi employees. Despite these measures, however, labour costs and issues relating to work ethic and willingness to carry out certain jobs, undermine the success of such policies (GIZ/ILO, 2015). For instance, in 2012, the monthly salary of a national in the construction sector was almost three times that of a migrant: SAR 3,261 (USD 869) versus SAR 1,145 riyals (USD 305) (GIZ/ILO, 2015). Furthermore, the average monthly salary of a Sri Lankan working in the construction sector in Sri Lanka in the same year was LKR 7,392 (USD 49) (Department of Labour, 2013).

Less than 3 per cent of Sri Lankan migrant workers are professionals (with females representing less than 7 per cent of this skill group) (SLBFE, 2015). The majority are categorized either as unskilled (29 per cent) or skilled workers (31 per cent, 7 percentage points up from 2014), suggesting an increasing demand for skilled migrant workers. In terms of skills, Saudi Arabia receives the highest number of skilled individuals, while Qatar receives the relatively highest number of professional Sri Lankans (Table 5).[5]

Table 5 The number of total departures for foreign employment by country & manpower level, 2015

	Types of profession				Skills level			Total
Country	Professional	Middle	Clerical & Related	Domestic worker	Skilled	Semi-skilled	Unskilled	
Saudi Arabia	773	801	1,064	28,415	20,158	549	23,150	74,910
Kuwait	104	161	575	22,745	9,783	399	4,684	38,451
U.A.E.	1,612	1,902	4,661	9,204	11,114	2,321	12,787	43,601
Qatar	1,751	2,766	4,956	3,192	30,059	1,166	21,221	65,111
Oman	493	503	313	3,443	1,359	99	867	7,077
Bahrain	154	128	217	1,142	1,380	72	626	3,719
Other	1,370	660	686	5,137	8,245	231	14,109	30,438
Total	6,257	6,921	12,472	73,278	82,098	4,837	77,444	263,307

Source: Provisional estimates for the year 2015, SLBFE.

2. Trends in the construction sector in the GCC countries

The GCC countries have long been dependent on oil exports to boost their economic development. Hydrocarbon-related economic activities still represent a significant portion of their GDP, to various degrees, as seen in Table 6.

[5] The Bureau of Foreign Employment of Sri Lanka does not have a methodology to discern skilled occupations from unskilled or semi-skilled occupations. The categorization is done according to two lists: one for “skilled occupations” and one for unskilled occupations. The list are available in the web site and presented in this paper in Chapter 2 (See page 12).

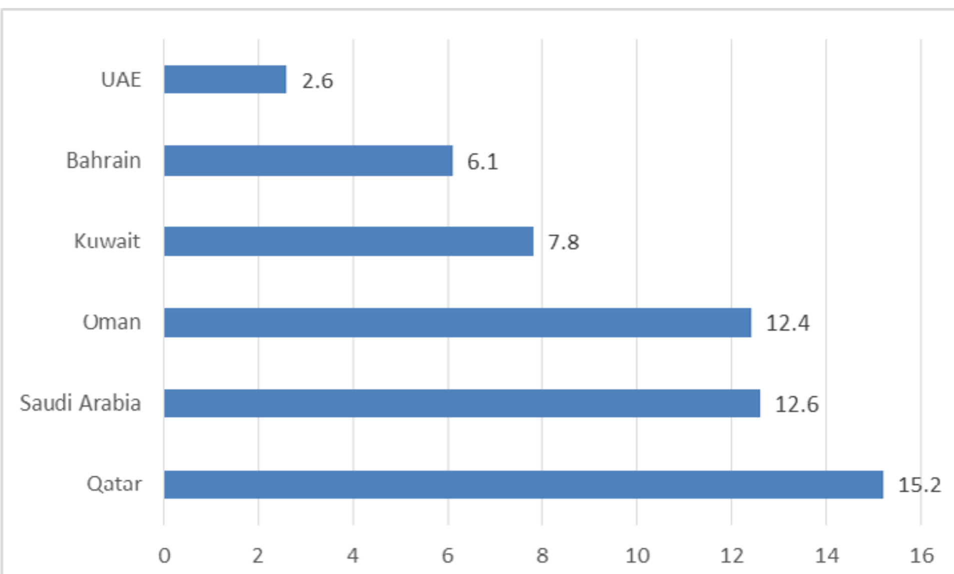
Table 6 GDP Composition of GCC countries, 2014 (%)

Country	Government	Oil	Other
Bahrain	11	24	65
Kuwait	11	63	26
Oman	11	56	33
Qatar	6	51	43
Saudi Arabia	12	43	45
UAE	3	34	63

Source: IMF, 2016

By using an elastic supply of relatively cheap foreign labour, the GCC countries have been able to develop more rapidly than if they would have solely relied on local labour force. However, this model of development has undermined the productivity of their economies and has limited growth in terms of economic diversification (IMF, 2013). The construction sector in particular has benefitted from this cheap, low-skilled labour model. As Figure 3 shows, all GCC countries have registered significant growth between 2011 and 2014 in the construction sector, with levels varying from over 15 per cent in Qatar, to 2.6 per cent in the UAE. Despite plans to move toward a knowledge-based economy and capital-intensive technologies in the construction sector, a complete overhauling of the current system is likely to be difficult to implement.

Figure 3 Construction sector growth 2011-2014 compound annual growth rate



Source: EMIS, 2015

There are a number of factors, however, that will likely affect the scale and composition of migrant labour in the construction sector in the GCC countries in the near future. Such factors relate to socio-economic developments in the GCC countries themselves, such as the increasing promotion of nationalization policies coupled with the relatively high levels of unemployment for the local population. As a result of falling oil prices, real GDP growth is expected to decrease in 2017, to 1.9 percent in Bahrain (from 2.9 per cent), 2.5

per cent in Kuwait (from 3 percent in 2016), to under 1 percent in Oman (from 2.2 percent in 2016), to 0.6 percent in Saudi Arabia, to 2 percent in the UAE (from 2.3 percent in 2016) (World Bank, 2017). Qatar alone is expected to register a boost in GDP growth, to 3.3 percent in 2017, up from 2.9 percent in 2016 (idem). This will have grave implications on government spending for most countries (Deloitte, 2016). On the sending end, ongoing development in the construction sector in Sri Lanka may demotivate Sri Lankans from further migrating. At the same time, the growing demographic pressure across all GCC countries, whose combined population is expected to increase significantly, may further propel demand in infrastructure development (Deloitte, 2016).

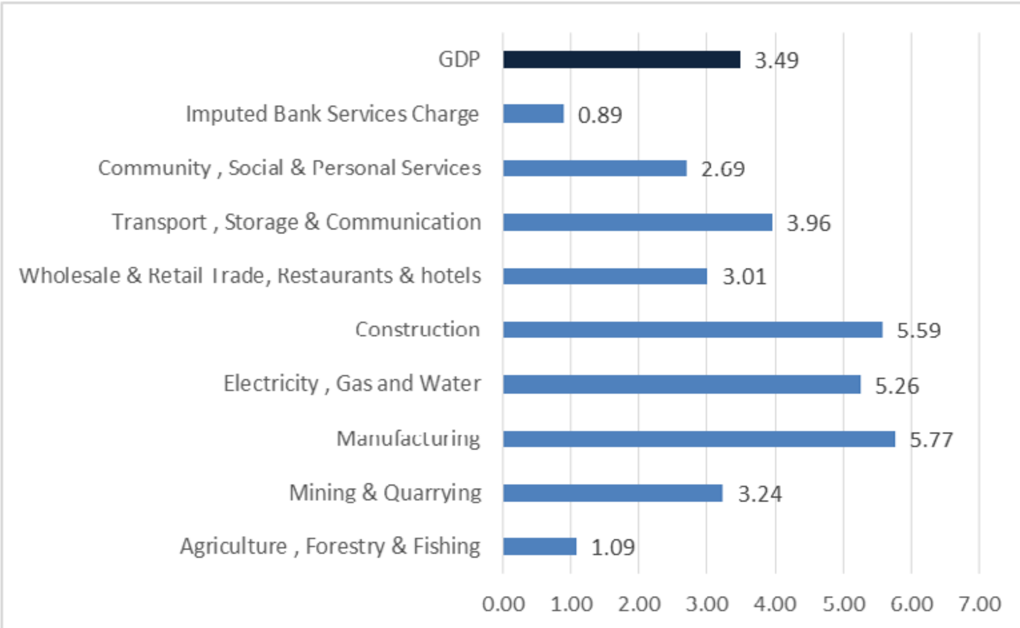
Given this overall economic context, the GCC countries may increase demand for certain occupations in the construction sector. Up to 2025, the following occupations in the low-skilled and semi-skilled categories are projected to be in demand: construction supervisor/foreman, construction worker, welder, plumber and electrician, air-conditioning technician, tiler, mason, carpenter, crane operator, maintenance engineer and civil engineer (GIZ/ILO, 2015).

Recent data available also points to existing skills shortages across all GCC countries. In Qatar, while junior- and senior-level skills seem to be available, there is an urgent need for qualified engineers (Qatar Construction News, 2016). Across all countries, the current challenge is the integration of Building Information Modeling (BIM) into their workflow, meaning, there is a great demand for engineers familiar with the process (Doka, 2016). As machine operators are also in short supply, enterprises resorted to an alternative arrangement: machines are supplied by a contractor together with a worker capable to operate them (idem). The following sections highlight the trend and demands in the construction sector in Saudi Arabia, UAE, Qatar, Kuwait, Bahrain, and Oman.

Saudi Arabia

The falling oil price has severely hit the local economy, however, it is nevertheless expected to increase at a rate of 1.1 per cent in 2016, and to 1.7 per cent in 2017 (Focus Economics, 2016). Between 2003 and 2013, the construction sector marked an 8 per cent growth rate, creating over one million jobs throughout the decade, which was more than any other sector of the economy (Mckinsey, 2015). As portrayed in Figure 4, the construction sector has increased from a level of 4.7 per cent in 2005 to 5.6 per cent in 2015 in relative to the GDP (General Authority for Statistics, KSA, 2016). Furthermore, the total number of foreign workers employed in the construction sector in 2015 was 1,034,460 representing 51 per cent of the total foreign labour in the Saudi economy (General Authority for Statistics, KSA, 2015) (*see* Figure 5).

Figure 4 Percentage growth in GDP by economic activity, 2015



Source: General Authority for Statistics, KSA

Figure 5 Number of foreign workers demand by economic activity, 2015

Source: General Authority for Statistics, KSA (2015)

The demand for manpower is expected to continuously grow in the construction sector given the number of infrastructure projects that are in the pipeline, i.e. metro lines of Mecca, the metro and light rail networks in Jeddah, and the Taif International Airport (Deloitte, 2016). Moreover, measures to promote religious tourism have translated into higher budget allocations towards the infrastructure sector. Furthermore, increase in population size has further fueled the demand for housing. Hence, demand for foreign labour in the foreseeable future is expected to increase (Alpen Capital, 2015). The outlook for the construction sector seems to remain bright up to 2020, as the industry's output is forecasted to increase at a 7 per cent rate during this period, compared to about 6 per cent during the 2011-2015 period (Timetric, 2016).

Demand for low-skilled workers, which makes up almost 90 per cent of the labour force in the construction sector (General Authority for Statistics, 2015), is not expected to decrease anytime soon either. The sector is plagued by the social stigma of low-paying and physically-taxing jobs, which makes it rather unattractive for the Saudi population (Mckinsey, 2015). Furthermore, the sector relies on the most part on unsophisticated practices and standards, for instance, the sector still uses brick-cast concrete blocks instead of the less labour-intensive metal frames and precast concrete that would reduce the number of on-site labour needed (idem.).

High unemployment rates for the local population, coupled with low productivity and relatively small margins – only 5 to 7 per cent in 2015, representing one sixth of the US levels and one third of the levels of Kuwait (Mckinsey, 2015) – will eventually lead the country to invest in modern construction technologies and create more highly skilled jobs that would attract the local population, if it wishes to not undermine further economic growth. This in turn is expected to have repercussions on the volume and composition of foreign labour, namely leading to lower overall demand but higher skill levels.

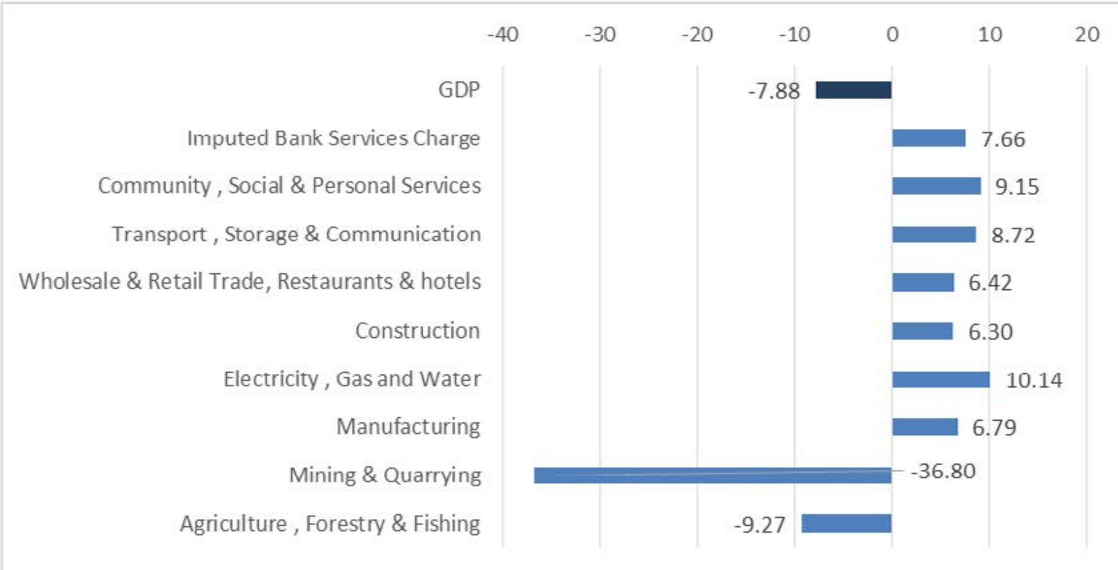
The National Transformation Plan, which develops the country's strategy to move away from oil dependency, has laid out the main targets for the next 4 years, including the creation of 450,000 jobs for Saudi nationals in the private sector and a five-percentage point decrease in the public wage bill (McAuley, 2016). Yet, the significantly better working conditions, benefits and wages in the public sector – where the average wage is 70 per cent higher than the average in the private sector – make the private sector less attractive overall; a case in point represents the unsuccessful efforts of the Government to Saudize the retail sector, where there are relatively low barriers to entry in terms of qualifications (idem.). Other measures to increase the incidence of Saudi (native) workers vis-à-vis migrants in the private sector reverts back to taxes on foreign labour (The Economist, 2016; McAuley, 2016).

For the time being, however, despite these more sound proposals of a system overhaul, both in terms of education and training and in terms of wage restructuring, the status quo is not expected to change significantly.

The United Arab Emirates

The construction sector contributed to 10.8 per cent of the country's GDP in 2015. Another indicator of the dynamism of the sector is the 6.3 per cent growth rate in 2015, while the overall GDP decreased by almost 8 per cent (*see* Figure 6). In 2016, projects worth USD 8.3 billion were awarded in Dubai, including the Atlantis Hotel expansion, the Burj 2020 development and the Route 2020 metro link (Deloitte, 2016). In Abu Dhabi, there are a number of projects that are in the pipeline, which are worth up to USD 1.5 billion (idem). Given the relatively liberal investment climate, advanced regulatory framework of the real estate sector and the number of planned infrastructure projects, the construction sector is forecasted to grow at a 6.6 per cent rate for the year 2016 (Fahy, 2016; Alpen Capital, 2015). This is significantly higher than the predicted GDP growth of 2.6 per cent (idem).

Figure 6 Percentage growth in GDP by economic activity



Source: Federal Competitiveness and Statistics Authority, 2015

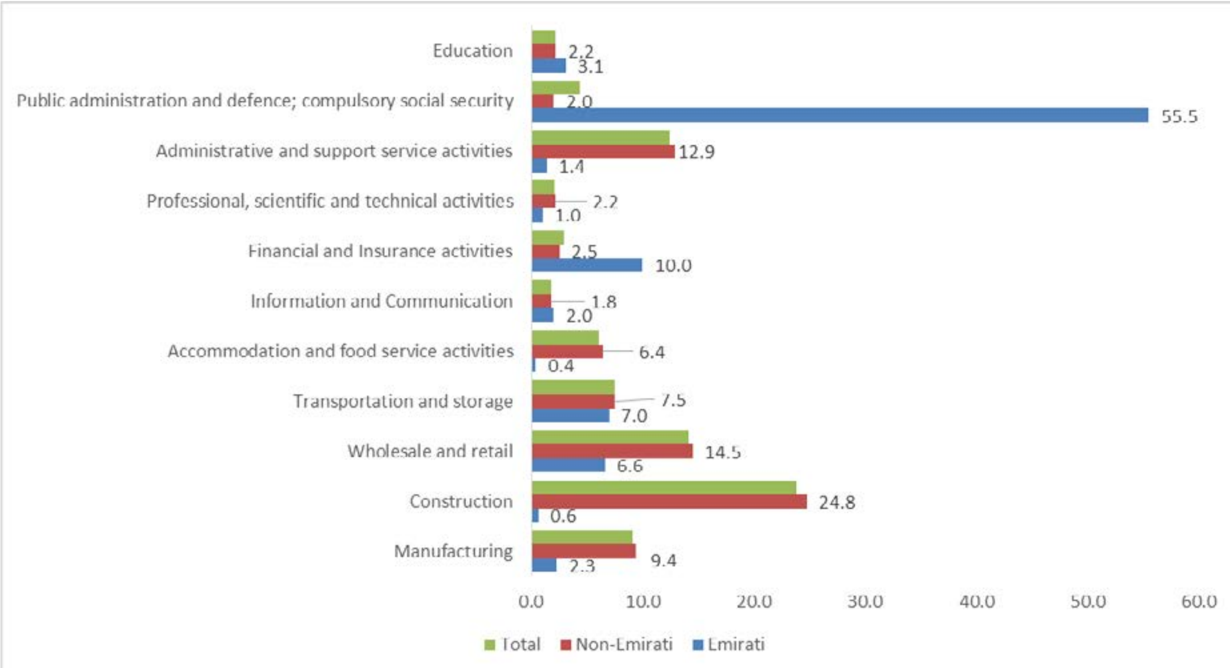
In terms of employment, the construction industry topped the list of the three major employers in 2015. There were over 1.5 million people working in the construction sector, which is equivalent to 34 per cent of the total workforce (Khaleej Times, 2015). Other sectors that highly depend on migrant workers include wholesale and retail, administrative and support activities and manufacturing.

In the Emirate of Dubai, too, the construction sector employs the largest share of the workforce, 24 per cent, followed by the retail sector at 14 per cent (Figure 8). The construction sector in Dubai is highly reliant on foreign workforce, as less than 1 per cent of the local population is employed in the sector. This is in sharp contrast to the public administration and defense sectors, which employ over half of the local population and only 2 per cent of the foreign workforce.

The construction sector employs 66 per cent of the craft workers and 20 per cent of machine operators, while employing only 12 per cent of highly skilled professionals (Figure 9). Productivity indicators for construction show that construction activities in the GCC lag behind not only with respect to advanced economies but also middle income ones (See ISIC Rev 3 by OECD). The analysis of trends over the past years also show a negligible pace of convergence between GCC countries and economies where construction is endowed by cutting edge technology. For this reason, it is likely that the demand for skilled and semi-skilled workers is not expected to decrease in the coming years.[6]

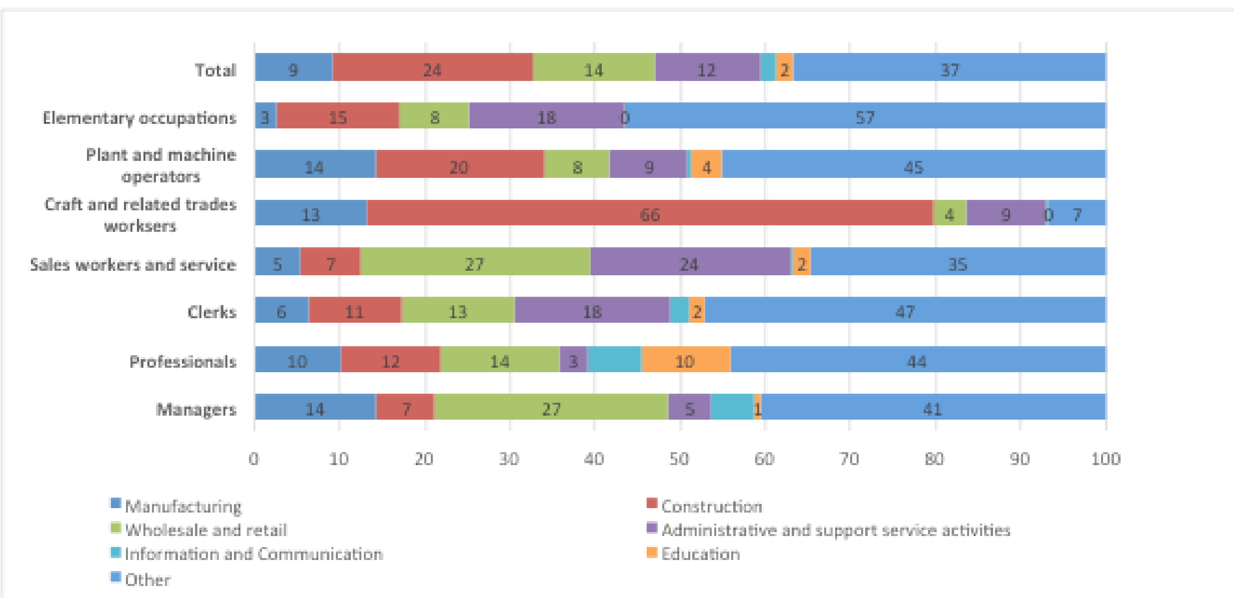
[6] ISIC Rev 3, OECD 2017 and author's elaboration on SNA statistics of GCC countries.

Figure 6 Percentage Distribution of Employed 15 Years and Over by Nationality and Selective Economic Activities– Emirate of Dubai, 2015



Source: Dubai Statistics Center

Figure 7 Percentage Distribution of Employed 15 Years and Over by Selected Occupation and Selected Economic Activities – Emirate of Dubai, 2015



Source: Dubai Statistics Center, 2015

Qatar

In Qatar, preparations are well underway for the World Cup, with five stadia in progress and another USD 20 billion to be invested in additional projects by the end of 2022 (Deloitte, 2016). The sector contributed QAR 47 billion (equivalent to USD 12.8 billion) to the GDP in 2014, which is the equivalent of 6.1 per cent, registering a 22.3 percent increase over the previous year (Ministry of Development Planning and Statistics, 2015). Furthermore, the sector employed over 630,000 workers, which is an 11 per cent increase compared to the previous year (EMIS, 2015).

Given the high population growth, forthcoming mega events (Qatar 2019 Athletics World Championship and the Qatar FIFA World Cup 2022), relatively low share of locals in the total population (24.5 per cent in 2015) and difficulties in attracting the local labour force, the demand for migrant workers is expected to continue. While junior and senior level skills seem to be available, the country is experiencing a shortage of engineers (Qatar Construction News, 2016).

To attract the skilled labour needed, the country is also working towards addressing abuses of human and labour rights, by introducing a series of labour market reforms, including a set of proposed reforms to the kafala system. Once the law is implemented, migrants would enjoy greater flexibility, with the possibility of either changing employers or leaving the country without needing permission by the khefeel (idem). Although the human rights angle is arguably the most discussed aspect of the kafala system, the labour market inefficiencies it leads to are not negligible either. The combination of low wages, lack of mobility between employers in search of a better pay, and the relatively short contracts and job-related insecurity dis-incentivizes workers from investing in their skills and education, and by extension, in increasing their labour productivity (Soto and Vasquez Alvarez, 2011). Moreover, the practice engenders a rent-seeking behavior by employers, who prefer sponsorship rates to the alternative of increasing productivity and providing efficiency wages (idem). Therefore, the aforementioned change in the system is likely to impact the labour market with a better allocation between supply and demand and significant increases in labour productivity.

Kuwait

The construction sector represented 2.1 per cent of GDP in 2014, an increase from 1.8 per cent in 2013, and a year on year change of 8 per cent (EMIS, 2015). In the same time period GDP registered a -1.6 per cent value (World Bank Indicators). The Kuwaiti construction sector is expected to grow well into the 2020s. The industry registered a compound annual growth rate of 5.2 between 2011 and 2015 and is expected to accelerate to 6.4 over the period 2016-2020. This growth is driven by the country's Vision 2035 programme, which emphasizes on developing roads, rails, the airport and related infrastructure (Timetric, 2016). Infrastructure related construction projects represented the third largest market in the sector over the past five years, reaching up to a level of 20.5 per cent of the industry's total value in 2015 (Construction Week Online, 2016). Some of the most important projects in 2016 were the national railroad system, the metropolitan rapid transit system, the Mubarak seaport and a number of hospital developments as well as new roads (Deloitte, 2016).

Bahrain

The construction sector in Bahrain represented 6.3 per cent of the GDP in 2014, an increase from 5.9 per cent in 2013 and a year on year change of 9.8 per cent (EMIS, 2015). In Bahrain, the main projects concern the expansion of the international airport, which is expected to increase its capacity to 13.5 million passengers per year, as well as a housing scheme of about 25 thousand units in the coming years, as promised by the Ministry of Housing (Deloitte, 2016). In terms of foreign employment, the Government's provisional amnesty on undocumented immigrants, together with higher visa-related fees that now cover a 2-year employee health insurance, mean a larger pool of available foreign workforce locally and increased costs for hiring from abroad (Gulf Talent, 2016).

Oman

The construction sector in Oman represented 6.2 per cent of the GDP in 2014, an increase from 5.2 per cent in 2013 and a year-on-year change of 24.9 per cent (EMIS, 2015). The main project in the country is the national railway system, with a 2,135 km length and a planned budget of USD 15.6 billion (Deloitte, 2016). In terms of foreign employment, although there is a demand from the on-going projects, the two-year visa ban for those migrants who terminate their contract before the end date by leaving the country, together with the restrictions on occupations for migrants driven by the *Omanization* policies, make hiring difficult, and have in fact reduced employee turnover in the private sector (Gulf Talent, 2016).

1. The extent of skills mismatch

Information on the current vacancies in the GCC countries and the percentage of Sri Lankan departures in response to such vacancies is not available. However, since more than 80 per cent of Sri Lankan migrants head for the GCC countries, it does not seem far-fetched to assume that a significant share of the vacancies in Table 7 are from the region. The number of vacancies might be artificially increased as the same vacancy could be advertised through multiple recruitment agencies (MFEPW, 2013). Nevertheless, the data available clearly indicates that the demand for labour, regardless of the level of skill, is not met by the Sri Lankan work force. In 2013, the latest year for which the data was found, only 45 per cent of the vacancies advertised were filled.

One category that seems to stand out is domestic workers, which represented over 40 per cent of the total outflows in 2013 and met more than 70 per cent of the demand (Table 7). All in all, domestic work is the sector that provides the best match between demand and supply. Two possible explanations can be provided: First, Sri Lankan recruiters receive between USD 1,000-1,800 (ILO, 2013) for any domestic worker placed in the GCC. The amount is considerable, as the minimum wage per month for a skilled worker in the services sector is 9,500 LKR, the equivalent of USD 62.[7] Second, Sri Lankan women, relative to other women in South Asia, enjoy a certain degree of freedom from religious or cultural barriers that restrict female emigration in other contexts (ILO, 2013).

In 2012, only 22 per cent of the vacancies in the construction sector open for migrant workers were filled (Table 8). In terms of absolute numbers, Mason-General was the most in-demand profession (3,173), of which 20 per cent (602) of them were filled. However, it was the Painter-Building profession, which had the highest coverage of vacancies (54 per cent).

[7] See WageIndicator.org, 2017.

Table 7 Number of Job Orders (i.e. vacancies) and Departures through Registered Sources by Manpower Levels, 2013

Manpower Level	2010		2011		2012		2013	
	Job orders	Departures	Job orders	Departures	Job orders	Departures	Job orders	Departures
Professional Level	5,383	438	6,026	884	4,435	705	3,773	640
Middle Level	8,183	832	11,784	2,484	13,378	6,073	21,205	13,376
Clerical & Related	15,949	2,239	17,809	3,798	23,380	10,353	27,313	19,387
Skilled	254,583	41,074	208,396	31,660	153,588	33,070	147,546	35,294
Semi-Skilled	9,188	1,709	7,592	1,044	3,864	870	4,591	940
Unskilled	118,256	27,289	129,526	24,981	100,599	29,486	92,060	36,981
Domestic workers	341,840	86,917	279,711	81,442	202,796	94,612	101,247	73,987
Total	753,382	160,498	660,844	146,293	501,040	175,169	397,735	180,605

Source: SLBFE, Departures for Foreign Employment, 2013

Table 8 Number of Vacancies and Departures of Construction Craftsmen Abroad

Occupation	2010		2011		2012	
	Vacancy	Departures	Vacancy	Departures	Vacancy	Departures
Bar Bender	197	124	108	10	217	95
Building Carpenter	626	166	1690	344	740	227
Carpenter –Joiner	4896	1349	1688	373	69	13
Carpenter Shuttering	1570	362	1447	171	701	75
Building Electrician	221	39	452	208	270	65
Plumber	-	-	-	-	621	70
Mason-General	7564	2333	5211	1013	3173	602
Mason-Tile Fixer	1625	683	835	328	419	73
Scaffolder	231	18	487	16	200	61
Painter-Building	238	42	145	51	187	101
Total	17,168	5,116	12,599	2,585	5976	1312

Source: ICTAD, 2014

2. Underlying factors of the skills mismatch

Skewed and uncertain labour demands in the GCC countries

The GCC countries are trying to move towards a knowledge-based economy and diversify their economies away from hydrocarbon-based economic activities. However, companies in the construction sector have little incentive to switch to a more capital-intensive, technologically-based practice as employing low-skilled migrant workers is still the most economically viable option (GIZ/ILO, 2015). This significant demand for low-skilled workers in turn translates into low incentives for Sri Lankan migrants to invest in vocational training and education to further enhance their skills.

Furthermore, economic requirements for labour inputs are not the only factor affecting the number and type of placements witnessed at the end of a certain year. Assessment exercises on economic priorities and labour quotas certainly give *a priori* quantitative target (GIZ/ILO, 2015). However, the migration flow to the GCC at the end of the year is influenced by the incentives that recruiters have in placing certain types of workers over others. In other words, final placements may be contingent more on those workers who can be profitably marketed, rather than on those initially envisaged by a labour and skills assessment. (idem).

Difficulties in attracting labour in the construction sector

There are two main factors that exacerbate the skills mismatch in terms of labour supply. First, there has been an increase in local demand for labour in the construction sector in Sri Lanka due to the rise in investment in infrastructure. However, perhaps the most significant factor is the low enrollment and completion rates of vocational training and education relevant to professions in the construction sector. As Table 9 presents, only 40 per cent of the projected number of trainees actually registered for courses, and less than 50 per cent of the projected courses were implemented. Assuming that the projected numbers were based on forecasted needs, then the supply of skills clearly did not meet the demand. Blue-collar jobs are not particularly sought after, thus they fail to attract recent graduates. So, although there is a higher demand for skilled craftspeople and supervisors, for instance, there are far fewer graduates than needed. In comparison, the number of students enrolled in ICT related courses far exceeds the demands of the industry (Dundar, 2014).

In an effort to attract more young people and upgrade the skills of those already working in the construction industry (INCTAD, 2014), the Ministry of Construction, Engineering Services, Housing and Common Amenities together with the main regulatory body in the industry – ICTAD/CIDA, and the National Construction Association of Sri Lanka – have implemented a national awards scheme, “Mahabhimani” in 2013. In 2014, a number of awards were given in various fields in the construction sector, where, besides recognition, winners were given motorcycles and insurance policies (news.lk, 2014). Craftsmen who stood out in 10 construction categories, including “Best Construction Machine Operator”, Best Mason”, “Best Plumber”, “Best Painter”, “Best Electrician”, etc (Mahabhimani Facebook page, 2014), were presented with awards. However, no awards have been granted since then and the competition’s web page has been shut down, while its social media accounts have been inactive for the past 3 years.

Table 9 Number of targeted trainee outputs for the year 2011 and achievements

Training programme	Programmed		Progress	
	No. of Programmes	No. of Participants	No. of Programmes	No. of Participants
PRELIMINARY TRAINING				
Basic Maintenance of Construction Equipment	26	546	19	360
SKILL DEVELOPMENT				
Light Equipment	12	48	7	46
Dump Truck	5	10	0	0
EARTH MOVING EQUIPMENT BASIC MODULES (HEMOT)				
Crawler Tractor	5	20	01	04
Wheel Loader	7	22	04	08
Motor Grader	10	60	06	23
Hydraulic Excavator	10	90	08	64
Backhoe Loader	13	260	11	124
SPECIALISED EQUIPMENT				
Mobile Crane	9	54	03	06
Plant Transporter	16	48	09	28
Fork Lift Operator	6	18	04	07
Total	119	1056	56	629

Source: ICTAD, 2011

Quality of vocational trainings and other qualifications

The mismatch between the demand and supply of skills in the construction sector is not only in terms of quantity, but in respect to quality as well. For instance, the SLBFE (2013) notes that a number of foreign vacancies were open for "carpenter-joiner" and "mason-tile fixer," whereas the relevant courses registered with the TVEC were providing training for "carpenter-furniture" and "mason-general", respectively.[8] A possible solution to this gap would be the multi-skilling of individuals prior to migration, which would increase the adaptability of the Sri Lankan workers and would make them more responsive to labour market changes.

The qualitative mismatch concerns not only the type of degrees and certificates, but also the content of the curricula. For instance, for a migrant worker to gain employment as a quantity surveyor, membership of the Royal Institution of the Chartered Surveyors (RICS) is preferred and often required. In fact, out of 59 job advertisements for quantity surveyor advertised in the Gulf Talent website (an online recruitment portal,

[8] Joiners assemble wood in a workshop, whereas carpenters construct the building elements on-site. The difference implies that the two occupational profiles are not interchangeable, though being closely related. See: http://www.internationaltimber.com/news/joinery/what-s-the-difference-between-a-carpenter-and-a-joiner-

accessed on June 17, 2016), almost 40 per cent required or considered membership of RICS to be a significant advantage. Yet, a RICS-certified programme on quantity surveying has only been available in Sri Lanka since 2011, by the Colombo School of Construction Technology and the University of Salford in Manchester, UK. The programme is based on three years of theory and one year of industrial training and rewards the students with a Bachelor's of Science degree upon completion. As of August 2016, the programme has produced 82 graduates who are RICS accredited (CSCT, 2016). However, given that most of the job advertisements require a minimum of 5 to 10 years of experience in addition to the qualification, not many Sri Lankans would be eligible for these positions overseas immediately after graduation.

Furthermore, often TVET qualifications acquired in Sri Lanka bear little influence on the recruitment process in the GCC countries. Other eligibility criteria such as work experience in a foreign context, willingness to work for a low wage, and specific skill-sets carry more weight than the qualifications per se (GIZ/ILO, 2015). For instance, the Gulf Talent website (accessed on June 17, 2016), an online recruitment portal, reveals that many companies in the construction sector in the UAE require or prefer previous local experience. Out of 25 job advertisements analyzed, 14 required or preferred previous work experience in the Middle East or the UAE specifically.

Another type of skills that does not receive enough attention are general/soft skills, specific to the GCC countries context and the construction sector, which is arguably different from other economic sectors. However, to date, soft skills training is taught in modules that are general to all occupational profiles, making it less effective, as workers will join very diverse workplaces. The Tertiary and Vocational Education Commission (TVEC) does not seem to provide training of such soft skills, nor does the Construction Industry Development Authority (CIDA), the main training provider in the construction sector.

Another issue in terms of quality of labour supply is the lack of harmonization of national qualification frameworks between Sri Lanka and the GCC countries (see Table 10). What is even more surprising is the fact that there seems to be no coordination among the GCC countries themselves. There is work in progress in the form of the Gulf Qualification [meta]-Framework, whose purpose is to enable GCC countries "to relate their national qualifications and systems to a common reference framework" (National Qualifications Authority, 2013).[9] However, simply coordinating the typologies of degrees and the skill-level they represent is insufficient for practice-oriented sectors such as construction - of much more help would be a qualification framework of TVET trainings directed specifically at the levels and skills within the sector. So far, none of the analyzed countries have taken steps to implement a sector-specific national qualification framework.

[9] "Meta-qualification" refers to a qualification framework that is common to all GCC countries. See National Qualifications Authority, 2013.

Table 10 Comparison of National Qualification Frameworks

Sri Lanka	UAE	Saudi Arabia	Oman	Bahrain
Doctoral Degree, MD with Board Certification	Doctoral Degree	-	-	Doctoral degree
Master of philosophy, Masters by fulltime research, DM	Master's degree	-	-	Master's Degree, Higher Diplomas
Masters with coursework and a research component	Graduate Diploma	-	-	Bachelor's Degree
Postgraduate Certificate, Postgraduate Diploma, Masters with coursework	Bachelor degree	-	-	Associate Diplomas
Honours Bachelor Degree	Higher diploma	Doctor of Philosophy	Doctoral Degree	Diplomas
Bachelor Degree, Bachelor Double Major	Diploma/ Associate degree	Master of Science, Master of Arts	Master's Degree, postgraduate diploma	Advanced School Graduation Qualification, Higher Certificates
Higher diploma	Certificate	Higher Diploma in Arts or science	Bachelor's Degree, Graduate Diploma	School Graduation Qualification
Diploma	Certificate	Bachelor of Arts or Science	Advanced Diploma	Intermediate Certificate
Advanced Certificate	Certificate	Diploma of Arts or Science	Diploma (includes Associate degree)	Access 2
Certificate	Certificate	Associate Diploma of Higher Education	Certificate	Access 1

Sources: Sri Lanka - Ministry of Higher education, 2012; UAE – National Qualifications Authority, 2015; Saudi Arabia - National Commission for Academic Accreditation & Assessment, 2009; Oman – Oman Accreditation Council; Bahrain - National Authority of Qualifications & Quality Assurance for Education & Training

This report has covered the overall patterns of labour migration from Sri Lanka to the GCC countries specific to the construction sector. The analysis reveals that depending on the age group and gender, the migration trends of Sri Lankan workers differ in terms of type of occupation and skill level. In regards to recruitment practices, the majority of the Sri Lankan migrants attain their employment abroad through recruitment agencies. However, the study notes that the engagement of multiple intermediary agencies increases the cost of migration and jeopardizes the transparency and the legality of the overall process.

In terms of vocational training, there are a wide variety of institutions that offer courses for occupations relevant to the construction sector. However, the trend analysis highlighted the general low enrollment and completion rate in these courses.

In regard to labour demand, the analysis revealed that demand for unskilled and skilled labour in the construction sector will continue to be high in most GCC countries. Nationalization policies that are undertaken in many of the destination countries are unlikely to dampen the demand for migrant labour in the near future.

Based on these trends and analysis, this report has revealed the skills mismatch both in terms of labour supply and qualifications of migrant workers. The study showed the extensive shortfall in the supply of Sri Lankan workers to meet job orders across various professions in the construction sector. This phenomenon can be partially explained by the lack of willingness among young Sri Lankans, especially graduates, to take up labour-intensive, low-skilled and blue collar jobs. This report proposes that this issue can be tackled by increasing the demand for a skilled labour force. Increasing skill-levels of the Sri Lankan migrants would give them a competitive edge against migrants from other South Asian countries; although it should be noted several other countries are also making investments to up-skill their workers.

Qualitative mismatch also emerged as a factor, though less so than the quantitative mismatch. The driving force of this discrepancy is the way in which the curricula for vocational training courses are developed in Sri Lanka. More comprehensive curricula are required to make vocational training more attractive to youth and relevant to labour market demand. Furthermore, occupational qualifications should be identified specifically responding to sub-qualifications needs (in ISCO language, at the three digits levels) and wages negotiated for such jobs providing premiums targeted to three digits occupations.

Women and men are segregated not only in different occupational classes, but also in different sectors, with men over-represented in construction. If there is little or no scope to promote female employment in low-skilled occupations in construction, actions aimed at up-skilling construction workers are likely to make construction vacancies attractive to women as well. Specifically, whereas some women are already recruited for high skilled jobs such as engineers and technicians, clerical jobs in construction represent one of the next frontiers of feminization of labour migration from Sri Lanka to the Gulf. However, Sri Lankan authorities have to bear in mind that living conditions are critical if female employment has to be promoted, as current worksites where workers live and work are often thought to host men only. The severe gender segmentation of labour markets and societies are still an obstacle for an effective promotion of female employment in construction.

The following section includes a set of recommendations aimed at realizing a win-win situation for both Sri Lanka and the GCC countries. These recommendations are based on labour market trends in Sri Lanka as well as the countries of destination. Furthermore, the actions that are proposed need to be carefully designed while considering further country-specific studies. Each recommendation is marked according to the time span of action required for its implementation, namely, short-, medium- and long-term.

Many of the recommendations require a collaborative effort among different agencies across borders. Not only public authorities of Sri Lanka and the respective GCC countries, but also international organizations, academia, trade unions, training institutions, recruitment agencies, employers and civil society need to be engaged to comprehensively address the pertinent issues.

1 Improvement of Labour Migration Information System

1.1 The national LMIS should be adjusted to better capture labour market trends by collecting data on socio-demographic and occupational profiles of migrant workers, as well as information on labour demand by industry, sector, and occupation (short- to medium-term).

A national LMIS should be flexible enough to include information that is progressively made available by improved registration systems and data sets. In fact, most statistics on migration stocks and flows are calculated from administrative records: information should be aggregated for statistical analysis as soon as registration systems are updated with new fields.

Data sets and reports on Sri Lankan and international labour markets should include information on occupational profiles of migrants that are in demand to make stock and flow variables more informative for policy design purposes. Better registration systems would revert back to improved description of socio-demographic characteristics of potential migrants, as well as subjective statistics such as individual preferences (i.e. preferences for a certain occupation / certain sectors), aspects relating to choice (i.e. preferred duration of the migration spell, or other aspects of seasonality of employment). On the demand side, data on vacancies should include data on industry, sector and occupational profiles demanded. These data should be made easily accessible for policy formulation, research and public use.

Finally, registration systems should embed control group set-ups to make programme evaluation easier through impact estimation using randomized approaches. For instance, in order to evaluate the effectiveness of a specific training module (for instance, within a specific CBT curriculum), the same module should be piloted to some potential migrants (treatment group). The impact of the module can be therefore monitored looking at the relative performance of a group of potential migrants with similar characteristics that did not receive the training (control group). Setting up these types of evaluation frameworks before the implementation of a training programme/module makes impact estimation less sensitive to biases and is cheaper.

1.2 Authorities in Sri Lanka and the GCC countries in charge of LMI collection should partner with each other to standardize data collection and simplify cross-country comparison.

After decades of efforts to better regulate the migration sector from South Asia to the GCC, no countries have yet been able to establish a cross-country information system. While the GCC countries, e.g. UAE, are investing in a comprehensive and up-to-date LMIS, further improvement is also necessary for LMIS in Sri Lanka. One way to do so would be by using existing sources of information, such as administrative data, which would make it easier for Sri Lanka to improve its own LMIS, thus enabling an effective cross-country information system. However, the bulk of these data sources are proprietary and therefore not always easily accessible, and this makes it difficult to have them as an input for both short-term labour adjustment tools, as well as for medium- and long-term planning. A further limitation is that data from administrative sources are designed with the purpose of supporting an administrative procedure of recruitment or placement, hence it is not always suitable to analyze and capture particular labour market processes and trends.

Improving the current LMIS in Sri Lanka, and thus improving knowledge concerning labour supply and demand, would have important spillover effects. One of them would be the streamlining of recruitment practices, as more transparency would help reduce the existing layers of intermediation, thus reducing the gap between final employer's costs and net wages. An occupational re-organization of the LMIS should be mirrored in specific instruments of governance. It is suggested in this case to use an incremental approach, starting from inserting LMIS sharing components in bilateral agreements between the Sri Lankan Government and individual GCC countries on skills recognition. A study of job types and competencies required for certain occupational classes, especially when it comes to clerical jobs families, are likely to identify potential scope for decent employment of women in GCC construction sites.

Moreover, as recommended by the ILO Convention on PREAs, 1997 (No. 181), a key area of collaboration between authorities in charge of employment and skills development on the one hand, and PREAs on the other hand, revolves around data sharing agreements, aiming at increasing integration of sources, to reach mutual benefits in terms of up-to-date, timely and consistent information on vacancies and job seekers (potential migrants). These agreements should be embedded in bilateral agreements, and supported by technical memoranda on metadata, so as to increase comparability and consistency.

1.3 Make use of big data analytics to capture and control biases to ensure that vacancies are not over-counted in skills assessment exercises (medium-term).

Big data analytics (e.g.: information extraction algorithms, content-based analytics, structure-based analytics, predictive analytics, etc.) can clean, organize, and manage high volumes of data and deliver analytical content that would provide a basis for evidence-based policy-making. Big data analytics could control for vacancies that are advertised on different recruitment platforms, and therefore be able to capture and present more accurate information.

1.4. Increase consistency of statistics to orient employment and skills development planning policies and programmes based on indicators (short-term).

Good policy-making depends on good evidence and implicitly on reliable indicators to provide that evidence. Relevant indicators on skills development for migration can be clustered into four groups: enrolment, completion, certification and employability after the expiration of employment visa permits[10]. The availability of such indicators would be useful in designing and delivering training courses to address the skills mismatch.

Multilateral agreements should be supported by information sharing mechanisms among South Asian countries, possibly under the umbrella of the Colombo Process. Information on labour demands for specific occupations should be shared, together with ways to avoid all unnecessary layers of intermediation before the placement takes place. The literature shows how these intermediation costs and fees are charged in a similar way across South Asian countries, starting from rural communities and ending where jobs offers

[10] Employability is defined as the set of achievements, understandings and personal attributes that make individuals more likely to gain employment. In this specific case, it can be measured by the capacity of a migrant worker to have its contract extended, or to have employment opportunities elsewhere.

are brokered in the destination country. Establishing corridor and sectoral approaches to recruitment and placement makes the process more governable.

2. *Strategic bilateral partnerships by type of migration*

2.1 Saudi Arabia, Qatar and UAE should be seen as main targets for sending higher skilled workers in construction activities.

The report provides a map of the countries of destination by level of skills required and by type of occupation taken at destination. Specifically, available evidence suggests that dependence on foreign labour is the highest in Qatar and the UAE. However, given the overall size, labour demands and its economic diversification strategy, Saudi Arabia is an important destination country for both unskilled and skilled labour. Alongside establishment of government to government agreements on public sector construction programmes, it is also recommended to develop partnerships with the private sectors in Saudi Arabia, Qatar and the UAE as they are heavily dependent on migrant workers (more than 99 per cent of private sector workforce in the UAE and Qatar, and over 80 percent in Saudi Arabia). Other potential measures include prospective Sri Lankan missions to these particular countries and creating linkages with the private sector, or tapping into return migration from these countries and use that expertise to train prospective migrants.

2.2 Provide incentives to increase the duration of migration to reduce recruitment costs (medium- to long-term).

Bilateral agreements should actively seek to build mechanisms to provide incentives for migrants and countries to invest in up-skilling and skills recognition, and for employers to retain migrants after the expiration of their contract, rather than encouraging repatriation. The promotion of more skilled migration is critical, as tenure within an individual enterprise increases with the skills level of the employee. In particular, employers are more likely to keep those who acquire enterprise-specific skills to reduce training and re-training costs. Bilateral agreements could embed a compulsory component of on-the-job training at the workplace at destination.

3 Skills for construction and institutional agreements

3.1 Identify key skills profiles to anticipate labour market demands (quantity), design skills recognition schemes, and implement effective skills training (medium-term).

Based on LMIS data, government, recruitment agencies, and training providers need to identify the occupations and skills that are in demand in the destination countries. The analysis of cross-country labour markets and skills trends in the GCC countries revealed four main occupational profiles for semi-skilled and skilled labour migration expected to be in demand in the short to medium term: (1) Mason, (2) Painter for construction sites, (3) Electrician for construction sites and (4) Supervisor of construction sites. Re-organizing the flows of migration in the construction sector around these four main occupational profiles would increase the efficiency of recruitment and placement, as well as align curricula development in Sri Lanka with up-to-date and specific labour market needs in the GCC.

3.2 Enforce the existing bilateral and multilateral agreements on skilled migration (medium-term).

This report looked at existing evidence on skilled and semi-skilled migration, as well as experiences on implementation of measures under the Colombo Process and the Abu Dhabi Dialogue. Though bilateral agreements over the past two decades have been made, most policies and measures aimed to bolster skills recognition and skills migration have remained on paper. In order to move forward from general expressions of intent, it is suggested to adopt an incremental approach, moving step by step from bilateral agreements to multilateral agreements that create *a standard* for both LMIS and recognition schemes.

A potential step-by-step sequence is presented as follows:

a) Identify preferential corridor for skilled migration, based on evidence from this and other reports. The content of the agreements should be taken from existing MoUs for public work projects (Government-financed, employers that are publicly owned);
b) Sign agreements with reputable and large private employment agencies (PREAs), as well as job brokering platforms (such as BAYT, Monster);
c) Consolidate the contents of existing agreements and perform an impact evaluation exercise of what worked and what did not work, and why;
d) Build a skills recognition component together with common LMI that categorizes vacancies by key occupations; and
e) Lever the skills recognition achieved in past steps to lobby for higher wages and other benefits against quality training matching skills needs.

3.3 Conduct an applied study on wage differentials to support negotiations on achieving higher wage rates for qualified (assessed for relevance and quality) migrant workers (short term).

The report showed how the GCC countries have introduced efforts to replace migrants with national workers. However, economic indicators suggest that (a) the dependency on foreign labour will continue to characterize the economies of the Gulf; and (b) the wage differential between migrants and nationals performing the same jobs is so high that it is unlikely that the process of labour replacement will be feasible in the near future. For this reason, this wage differential should be studied in order to better understand how Sri Lankan authorities could negotiate with GCC recruiters and employers for better wages at the sectorial and at the occupational levels. Of course, Sri Lanka faces competition with other countries of origin, especially among South Asian neighbors. In order to avoid or limit competition, the strategic approach suggested is characterized by two phases: (1) Establish agreements first aimed at increasing the stock of Sri Lankan migrants for specific occupations based on skills recognition schemes; (2) Once a loyalty feedback is established between the two countries, deploy efforts to negotiate best possible wages for workers providing sets of skills required by the employers. The applied study should be conducted in such a way that it will serve as practical input for negotiating skills during the formulation of bilateral agreements.

3.4 Develop a mechanism to transfer knowledge and skills of the returnees to modernize the construction sector in Sri Lanka (short-term)

A shift from the traditional and technology-lacking *modus operandi* in the construction sector in Sri Lanka and the promotion of capital-intensive technologies and related trainings, would significantly increase the

Sri Lankans' competitiveness abroad. In order to improve the skills of prospective migrants, Sri Lanka could tap into its pool of returned migrants, who can play a key role in upgrading process management and technology in the construction sector. Inter-ministerial commissions should be established to align the objectives of the Ministry of Industry and Trade in the modernization of domestic construction with other relevant ministries in the area of skills recognition.

4 Improving the TVET system

4.1 Conduct impact assessments to enhance completion rates of trainings (medium- to long-term)

Analysis of the TVET system in Sri Lanka shows 50 to 80 per cent completion rates (section 2.3 in this report, page 15). Hence, the report recommends to conduct series of impact assessments in order to understand the relevance, effectiveness and efficiency of currently available vocational training and standard programmes of pre-departure training. Instruments such as tracing studies are particularly useful in assessing training instruments. These evaluations should be then used to re-design the current occupation-specific curricula.

In particular, it is recommended that both general skills/ soft skills and technical skills training to be tailored to the construction sector. To date, soft skills training is taught in modules that are general to all occupational profiles, making it less effective.

As completion rates are low, it is advisable to design mechanisms to re-orient demotivated trainees and those who are not suitable for the type of vacancy available to alternative employment services, in order for them to find appropriate jobs either abroad or in the national labour market. Modern public employment services conduct assessment of training and re-training programmes after two to four weeks after the start of the programme, in order to reduce drop offs. Participants who are unsuitable for a training programme could move to other programmes (entrepreneurship education, training programmes aimed to get qualifications for different occupations, counseling).

4.2 Examine the current nature of recruitment practices and implement awareness raising activities on fair recruitment practices and costs (medium- to long-term)

The recruitment process in Sri Lanka is far from being regulated. Specifically, the literature suggests that by the time many potential migrants are enrolled in general pre-departure training, they have already contracted debts with local-level recruiters. Hence, it is suggested to conduct surveys among the trainees on recruitment costs. Such surveys would be beneficial to establish a system of regulations able to curb those recruitment costs currently shouldered by the low-skilled workers. It would also clarify whether the trainees are well informed about prospective employment opportunities and about the costs and benefits of the migration process.

Awareness campaigns and outreach activities to inform job seeks on the costs and benefits of migration should be implemented in both urban and rural regions. Ministries, in partnership with local authorities, NGOs and other civil society organizations, should take the lead in implementing such nation-wide activities.

4.3 Develop modular Competency Based Training (CBT) curricula that cluster together general and technical modules **(long-term)**

Technical training should be promoted for the occupations that are in high demand, such as Masonry, Construction Site Supervisor, Craftsman Masonry and Electricians. The movement of training resources to high demand occupations should be made in a gradual way with the use of updated data from LMIS at the beginning of the academic year. This will be possible when a database consolidates labour market trends in the Gulf. The gradual approach is proposed to maintain current curricula based on sectoral needs of Sri Lankan employers, and to gradually complement them with CBT modules specifically designed for needs of GCC employers.

4.4 Conduct impact assessment to control for quality based on tracer studies with employers at destination (short term)

Investments in aligning TVET systems with projected demand would have little value if not accompanied by the efforts of governments, employers and recruitment agencies to provide quality training. Investments in TVET trainings in Sri Lanka have no value if employers in GCC countries do not value such trainings. Impact assessment on quality can be effectively implemented using tracer studies that link the effectiveness of a training programme on a group of trainees with tracer interviews with their employers following 6 and 12 months of employment. This requires a LMIS capable to link a trainee to the employer at destination. The method can be used to compare effectiveness indicators between different training courses conducted by different institutions for the same type of vacancy (see Four Key types above).

4.5 Develop a regulatory framework for PREAs to act as match makers under the umbrella of the existing agreements between governments (medium term)

Job brokerage and placement of migrants from South Asia to the GCC are activities that have been progressively privatized in the past 30 years. As abuses and irregularities are widespread, it is important to continue to develop a regulatory framework for job brokerage, recruitment and placement. Some instruments are suggested: A system of accreditation specific to the four key types of occupations for skilled construction workers identified by this report could be put in place to control for the PREAs to comply with the laws and regulations, possibly linking occupational qualifications with wage floors and minimum working and living conditions for migrant workers. Sri Lanka could draw on the experience of the Government of the Philippines, which reached an agreement with Saudi Arabia in 2013 on domestic workers. The countries agreed to enforce regulations 1) to ensure workers are sent only through agencies that are accredited in both countries and 2) abolish recruitment or placement fees.

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