

MACRO LEVEL SUPPLY AND DEMAND ANALYSIS OF SKILLS OF NEPALESE MIGRANTS



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This report was produced by the project Generating Evidence for Future Skills Needs of Migrant Workers implemented by IOM with the financial assistance of the European Union, through Dakchyata: TVET Practical Partnership programme managed by the British Council. The views expressed herein can no way be taken to reflect the official opinion of IOM, The Ministry of Education, Science and Technology, Council for Technical Education and vocational Training, European Union and British Council.

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This publication was issued without formal editing by IOM.

This publication has been issued without IOM Publications Unit (PUB) approval for adherence to IOM's brand and style standards.

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Cover photo: IOM Nepal

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Council for Technical Education and Vocational Training



Ref: 1561

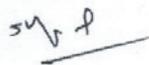
Foreword

Nepali migrants are significantly contributing to the country's economic development. However, there are many problems and obstacles the migrants are facing while working abroad. There is no significant number of research studies conducted regarding the conditions, opportunities and challenges facing the Nepali migrants. In this connection, a study was conducted for generating evidence for the future skills needs of migrant workers in Nepal with the initiation of the International Organization for Migration (IOM).

It is my utmost privilege to offer foreword on the auspicious occasion of publishing the report entitled ***"Macro Level Study on Market Diagnostics and Supply and Demand of Skills of Nepali Migrant Workers"***.

This report delivers a comprehensive understanding of the present foreign employment landscape of Nepal, destination countries for employment, skill development practices and recruitment processes for foreign employment and re-integration of returnees. Additionally, the report significantly scrutinizes the fundamental gaps and challenges as well as provides recommendations. I believe, this study might be a milestone for getting decent jobs and ultimately improving the socio-economic status of Nepali migrants.

I would like to appreciate the initiatives of the Ministry of Education, Science and Technology; the Ministry of Labour, Employment and Social Security; IOM and everyone who provided valuable suggestions at various points during the study. I also acknowledge the British Council, Dakchyata project and the European Union to this initiative.



Jeeb Narayan Kafle
Member Secretary
CTEVT

FOREWORD

Migration is significant contributor to Nepal's sustainable development. Every year about half a million Nepalis migrate overseas in search of employment opportunities.

IOM Nepal's study report 2021 indicates that only 13.6 per cent of the over 66,000 returnee migrant workers who were repatriated during COVID-19 pandemic had received job related training before the migrated. Similarly, the Nepal Migration Profile 2019 recommended on upskilling of migrant workers and identify new opportunities for returnees, with special focus to maximize the potential of women returnee migrant workers.

The **Macro Level Study on Market Diagnostics and Supply and Demand of Skills of Nepali Migrant Workers** is one of the key components of the project **Generating the Evidence for Future Skills Needs of Migrant Workers** part of Dakchyata Project managed by British Council and financed by the European Union. This study is prepared through analyzing the secondary data and primary research followed by validation of key findings through provincial and national consultations.

I believe that the findings and recommendations offered by the study will support relevant stakeholders to understand the dynamics of international and domestic market, analysis of migration and skill trends and demands for the development of relevant policies, planning and programs of skills development, safe and skilled migration, and reintegration.

I want to express my gratitude to the Ministry of Education, Science and Technology, the Ministry of Labour, Employment and Social Security, the Council for Technical Education and Vocational Training, the private sector, the National Skill Testing Board, and the Department of Foreign Employment for their technical inputs and cooperation for the successful completion of the study.

The IOM team is grateful to all contributors from the public and private sectors, academics, CSOs, and researchers, who shared knowledge, experience, and critical ideas at the various stages of the project implementation. The study team at Ernst & Young LLP also deserves my sincere gratitude for the outstanding effort they made to make this research a success. Finally, I want to express my gratitude to my IOM colleagues for their technical oversight, direction, and commitment in completing this project successfully.



Lorena Lando
Chief of Mission
IOM Nepal

ACKNOWLEDGEMENT

Generating Evidence for Future Skills Needs of Migrant Workers in Nepal is a project implemented by IOM supported under the Dakchyata: TVET Practical Partnership programme managed by the British Council and funded by the European Union.

The International Organization for Migration (IOM) entrusted this study entitled “Macro Level Supply and Demand Analysis of Skills of Nepalese Migrants” to Ernst & Young LLP (EY LLP India) and their subcontractor Centre for the study of Labour and Mobility (CESLAM) at Social Science Baha, Nepal in August 2022. We would like to thank the IOM team, particularly Programme Manager Mr. Prajwal Sharma for providing technical supervision, valuable inputs to the survey tools and his support during the various stages of the study. Similarly, we would like to acknowledge the support from Ms. Sangita Pudasaini, Mr. Dhurba Aryal and Mr. Subas Chandra Dahal to the study. Likewise, we express our gratitude to the teams of the Ministry of Education, Science and Technology (MOEST), Ministry of Labour, Employment and Social Security (MOLESS) and Council for Technical Education and Vocation Training (CTEVT) for the intellectual guidance throughout this research process. Similarly, our heartfelt thankfulness goes to Dr. Kamal Prasad Pokharel, Joint Secretary, MOEST and Dr. Thaneshwar Bhusal, Under Secretary, MOLESS for his analytical inputs in this report along with his strong support in designing research methodology among others. We are indebted to the IOM team in Nepal, and the teams at MOEST, MOLESS and CTEVT who provided their valuable suggestions during several formal and informal consultations to make the final report better and credible.

We are grateful to the study team members who carried out the study. In this regard, we would like to thank the team of study Mr. Somesh Kumar, Mr. Vikas Kumar Singh, Mr. Vimanyu Gansesh Sahu, Mr. Siddarth Dhar and Mr. Ashutosh Chauhan from **EY LLP India (EY)** and Dr. Jeevan Baniya, Assistant Director and Mr. Prajesh Aryal, Senior Research Associate, **Centre for the study of Labour and Mobility (CESLAM)** at Social Science Baha, Nepal for the entire study report. We are particularly impressed with their effective coordination before, during and after the research work.

We are thankful to EY and CESLAM, Social Science Baha who assisted in expediting the primary interaction interview process along with local provincial-level consultations. We thank the team for their excellent coordination at the local level.

We are hopeful that the findings of this research will be helpful to policymakers, academia, and journalists in making evidence-based policy, conducting critical analysis, and sharing information respectively.

Thank You!

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ABBREVIATIONS

ABC	Agroforestry, Basic Health, and Cooperative Nepal
AIDS	Acquired Immunodeficiency Syndrome
AMR	Antimicrobial Resistant
ANC	Antenatal Care
APF	Armed Police Force
ASEAN	Association of Southeast Asian Nations
BASE	Bielefeld Academic Search Engine
B/C	Brahmin/Chhetri
BoP	Balance of Payment
CBO	Community Based Organization
CBS	Central Bureau of Statistics
CEACR	Committee of Experts on the Application of Conventions and Recommendation
CEDAW	Convention on the Elimination of All Forms of Discrimination Against Women
CESLAM	Center for the Study of Labour and Mobility
CI	Confidence Interval
CORE	Connecting Repositories
CPN-M	Communist Party of Nepal-Maoist
CRC	Convention on the Rights of the Child
CWIN	Child Workers in Nepal
DCA	Dan Church Aid
DOFE	Department of Foreign Employment
DOTS	Directly Observed Treatment, Short course
EDCD	Epidemiology and Disease Control Division
ERIC	Educational Research and Information Center
FDI	Foreign Direct Investment
FEB	Foreign Employment Board
FEIMS	Foreign Employment Information Management System
FEPB	Foreign Employment Promotion Board
FET	Foreign Employment Tribunal
FEWF	Foreign Employment Welfare Fund
FPAN	Family Planning Association of Nepal
FY	Fiscal Year
GBV	Gender Based Violence

GCP	Gross Crossing Point
GDP	Gross Domestic Product
GEFONT	General Federation of Nepalese Trade Unions
GiZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GoN	Government of Nepal
HH	Household
HIV	Human Immunodeficiency Virus
HMG	His Majesty's Government
HTTCA	Human Trafficking and Transportation (Control) Act
ICCPR	International Covenant on Civil and Political Rights
ICERD	International Convention on the Elimination of all forms of Racial Discrimination
ICESCR	International Covenant on Economic, Social and Cultural Rights
ILO	International Labour Organization
ILO-IPEC	International Labour Organization's International Programme of the Elimination of Child Labour
IMU	Information Management Unit
INGO	International Non-Governmental Organization
IOM	International Organization for Migration
IRIN	Integrated Regional Information Network
LGOA	Local Government Operation Act
MDR	Multidrug Resistant
MOFA	Ministry of Foreign Affairs
MoHA	Ministry of Home Affairs
MoHP	Ministry of Health and Population
MoP	Margin of Preference
MoLESS	Ministry of Labour, Employment and Social Security
MoLTM	Ministry of Labour and Transport Management
MoU	Memorandum of Understanding
MPB	Marwadi/ Punjabi/Bengali
NCD	Non-Communicable Disease
NGO	Non-Governmental Organization
NHPC	National Population and Housing Census
NHRC	National Human Rights Commission
NIDS	Nepal Institute of Development Studies
NLSS	Nepal Living Standard Survey
NPR	Nepali Rupee
NRB	Nepal Rastra Bank

NRN	Non-Resident Nepali
OC	Other Castes
OR	Odds Ratio
PoE	Point of Entry
PDOT	Pre-Departure Orientation Training
PPE	Personal Protective Equipment
RAND	Random (command)
SAARC	South Asian Association for Regional Cooperation
SAPTA	South Asian Preferential Trading Agreement
SPSS	Statistical Package for the Social Sciences
SSB	Sahastra Seema Bal
STD	Sexually Transmitted Disease
STI	Sexually Transmitted Infection
TB	Tuberculosis
TMPSMX	Trimethoprim-sulfamethoxazole
UNICEF	United Nations International Children's Emergency Fund
UNODC	United Nations Office on Drugs and Crime
UP	Uttar Pradesh
USD	United States Dollar
UV	Ultraviolet
WOREC	Women's Rehabilitation Center

EXECUTIVE SUMMARY

Nepal is a remittance-based nation and hence there is a significant share of remittances in its GDP. It has crossed NPR 1 trillion (USD 8.33 billion) mark in the final months of FY 2021/22. It is observed that there has been an increasing trend of emigrants in the last two decades. The emigrants share in the population increased from 3.3 per cent in 2001 to 7.3 per cent in 2011 which has now slightly increased to 7.4 per cent in 2021. Nepalese migration is predominantly a male phenomenon creating a window of opportunity for increasing female participation.

The **COVID-19 pandemic** has impacted migrant workers livelihood along with the quantum of remittances sent by them to Nepal. But this phenomenon of migrants returning to their country can act as a **demographic dividend**.¹ One of the key pillars upon which this dividend can be reaped is **migrants' skills**. But it would require consideration of a key challenge of identification and alignment of migrants' skills with market demand, both in domestic and destination countries. Additionally, various actors involved in this **skill development process** need to be assessed and aligned with market needs. It would also involve participation of various technical and vocational institutions to harness the skills of returnee migrants in the development of country.

There is a critical role played by the Government of Nepal, various training institutions and apex bodies such as CTVET, private employers in Nepal and destination countries, recruitment agencies and other associated members to streamline the skill development process in accordance with every changing market requirement. On a broader level, it would require **evidence-based migration policy formulation**.

This requirement entails macro level supply and demand analysis of skills in domestic and destination countries, information on existing skill training system in Nepal, recruitment process along with emerging job markets and opportunities. Considering meagre share of females in migration, a focus on maximizing their potential is also required.

This **macro level study report** is an endeavour to reflect on the abovementioned requirement. It captures the current migration landscape of Nepal, existing and emerging destination countries, existing skill training system, recruitment process and prevailing gaps along with recommendations to address the gap.

This report is prepared through **secondary and primary research (surveys)** followed by **validation of key findings through provincial consultations**. The secondary research harnesses the existing reports from government entities and various news articles and studies. The primary research involves interaction with destination countries' stakeholders along with interview of migrants, training institutions, government officials, recruitment agencies and other key stakeholders.

1. When the demographic transition follows a swift fertility decline, age structural changes can lead to a specific set of circumstances whereby the relative size and age structure of the population may offer opportunities for breakthroughs in economic development. This is referred to as the demographic dividend. (Source – GoN NPC Report titled “Demographic changes of Nepal: Trends and Policy Implications” dated March 2017 which can be accessed from https://www.npc.gov.np/images/category/Demographic_Dividend_Report_May_2017_final_for_circulation1.pdf)

Key takeaways

The key takeaways in a nutshell are explained below -

a) Migration

There is a gender-biasness in migration. In terms of returnee migrants, Nepal Labour Migration Report 2020 infers **3.8 per cent share of females** which was substantiated with our primary research. This female share has now increased to 8 per cent in FY 2021/22. In our primary research interactions with 155 returnee migrants, **share of men was 4 times that of women**. We also interacted with 172 aspirant migrants where **share of men was six times that of women**. In our interaction with 50 private recruitment agencies, we found that male migrants are in domination.

b) Skills

In terms of skills, **sales and service sector has the highest share**. It also has the highest participation from both genders as found in primary research interaction with returnees. When returnees work in Nepal, the majority are engaged in **elementary occupations** only. There is a distinction between the sectors as employed in origin countries and in destination countries. As per Nepal Migration Report 2020, 15.1 per cent of returnees are employed in the same occupation in Nepal as abroad. It shows that **skills acquired abroad by returnees are not being utilized in the domestic market**.

The top three skills of returnees are related to segment of **sales and services, manufacturing, and elementary occupations** as per the Nepal Labour Migration Report, 2020. Even primary research survey reflects that **~52 per cent of returnee migrants have skill of service and sale industry**. The primary research survey also suggests that **~73 per cent share is of sales and services, manufacturing, and elementary occupations only**.

In case of aspirants, **hotel and hospitality is the leading segment followed by sales and services**.

c) Destination countries

As per the Nepal Labour Migration Report (2020), GCC countries were the most recent destination country for returnees with an overall share of 43.4 per cent migration happening there. India's share was 25 per cent whereas Malaysia was 4.4 per cent. It is in sync with primary research which suggests that **GCC countries occupy major share** but countries like Jordan, Cyprus, Poland, etc. are also emerging.

GCC countries are also favoured by aspirant migrants. From survey conducted for this report preparation, it was observed that top countries for aspirants are **Malaysia, Qatar, Kuwait, and UAE**.

This report is an effort to understand the key emerging destination countries which can be approached strategically by GoN for better employment exchange relationships with them. Some of the probable destination countries to be targeted can be **United Kingdom, Cyprus, Australia, Jordan, Poland, Romania, Croatia, Malta, Republic of Korea, Japan and Portugal**. These are in addition to conventional countries like Gulf Cooperation Council (GCC) Countries, India and Malaysia.

During interaction with training institutions (TIs), they shared that aspirant migrant are willing to work in emerging destination countries such as European countries like Cyprus and Japan.

d) Emerging job and skill requirements in destination countries

Selected destination countries are detailed in this report. They are also mapped with demand sector and their subcategory. It is prepared even after some data gaps. A summary is provided below.

Table 1- Summary of Emerging and demand sectors in destination countries

S.No.	Demand Sector	Subcategory
1. Gulf Cooperation Countries (Conventional Countries)		
A	Trade; repair of motor vehicles	<ul style="list-style-type: none"> ■ Storekeeper ■ Vehicle Mechanic
B	Manufacturing	<ul style="list-style-type: none"> ■ Loading and Unloading ■ Mobile and Stationery Machines ■ Forklift Operator ■ Related Elementary Jobs ■ Industrial Electrician ■ Lathe Machine Operator ■ Fabricators, Welders, Painters, Helpers
C	Construction	<ul style="list-style-type: none"> ■ Building Construction ■ Heavy and Civil Engineering Construction ■ Building Installation Services ■ Related elementary jobs ■ Foreman/ Rigger ■ JCB Operators ■ Building Support – Electricians, Plumber, Carpenter, etc
D	Accommodation and Hospitality	<ul style="list-style-type: none"> ■ Accommodation services ■ Housekeeping ■ Waiter/Waitresses ■ Cook ■ Receptionist ■ Cashier ■ Guard ■ Sales Assistant ■ Cafes, Restaurants and Takeaway Food Services ■ Food and Beverage Services
2. United Kingdom		
A	Construction	<ul style="list-style-type: none"> ■ Construction of buildings ■ Civil Engineering ■ Specialised construction activities e.g., demolition, installation, building completion activities
B	Business & Other Services	<ul style="list-style-type: none"> ■ Information technology ■ Support service activities ■ Professional services

S.No.	Demand Sector	Subcategory
C	Trade, Accommodation and Transport	<ul style="list-style-type: none"> ■ Transport and storage ■ Accommodation and food activities
D	Public Administration, Health, Education	<ul style="list-style-type: none"> ■ Health and social work
E	Agriculture	<ul style="list-style-type: none"> ■ Horticulture and harvesting
3. Cyprus		
A	Tourism and Hospitality	<ul style="list-style-type: none"> ■ Accommodation and Food Service Activities
B	Construction	<ul style="list-style-type: none"> ■ Residential and Non-Residential Building Construction ■ Hotels and Restaurants Construction ■ Sales Executives ■ Civil Engineers ■ Machine Operatives
C	Renewable Energy	<ul style="list-style-type: none"> ■ Solar PV Installation ■ Solar PV Maintenance and Operation
D	Information and Communication Technology (ICT)	<ul style="list-style-type: none"> ■ Software and system engineers ■ ICT and enterprise solution architects ■ Telecom and space engineers ■ Quality assurance analysts ■ Mobile application developers ■ Analysts for mobile apps and software ■ Cyber security specialists ■ Artificial Intelligence (AI), robotics and big data specialists
4. Australia		
A	Healthcare and Social Assistance	<ul style="list-style-type: none"> ■ Hospitals ■ Medical Services ■ Allied Health Services ■ Residential Care Services ■ Social Assistance Services ■ Child Care Services
B	Accommodation and Food Services	<ul style="list-style-type: none"> ■ Accommodation ■ Cafes, Restaurants and Takeaway Food Services ■ Food and Beverage Services
C	Construction	<ul style="list-style-type: none"> ■ Residential Building Construction ■ Heavy and Civil Engineering Construction ■ Building Installation Services
D	Sustainable and Renewable Energy	<ul style="list-style-type: none"> ■ Solar Installers ■ Energy Efficiency Engineers ■ Hazardous Materials Labourers ■ Wind Turbine Technicians

S.No.	Demand Sector	Subcategory
E	Retail Trade	<ul style="list-style-type: none"> ■ Supermarket and Grocery Stores ■ Hardware, Building and Garden Supplies Retailing ■ Clothing, Footwear and Personal Accessory Retailing ■ Pharmaceutical and Other Store-Based Retailing
F	Administrative and Support Services	<ul style="list-style-type: none"> ■ Building Cleaning, Pest Control and Gardening Services ■ Travel Agency and Tour Arrangement Services
G	Other Services	<ul style="list-style-type: none"> ■ Personal Care Services
H	Agriculture, Forestry and Fishing	<ul style="list-style-type: none"> ■ Meat processing ■ Cattle (Sheep, Beef) and Grain Farming ■ Fruit and Tree Nut Growing ■ Mushroom and Vegetable Growing
5. Jordan		
A	Construction	<ul style="list-style-type: none"> ■ Construction Manager ■ Building Construction ■ Housing/ Residential Construction ■ Building Installation Services ■ Supervisor and Construction Worker ■ Building Electrician ■ Plumber ■ Carpenter
B	Tourism and Hospitality	<ul style="list-style-type: none"> ■ Hotels and restaurants ■ Real estate including owned and leased properties ■ Travel agencies, tour operators and travel booking ■ Staff in Hotels & Restaurants (Chef, Bartender)
C	Manufacturing	<ul style="list-style-type: none"> ■ Garment Industry (Tailors) ■ Mobile and Stationery Machines ■ Related elementary jobs ■ Industrial Electrician
D	Healthcare	<ul style="list-style-type: none"> ■ Hospitals, clinics, laboratories, radiography clinics and veterinary activities ■ Community and personal services activities including care services
6. Poland		
A	Trade; repair of motor vehicles	<ul style="list-style-type: none"> ■ Sales agents, salespeople and brand representatives ■ Polish network supermarkets ■ Storekeeper ■ Motor vehicles mechanic
B	Manufacturing	<ul style="list-style-type: none"> ■ Machine tool operators ■ Welders ■ Machinists ■ Electricians ■ Electromechanical Engineers ■ Apparel workers, tailors or garment sewing specialists ■ Equipment operators ■ Freight movers

S.No.	Demand Sector	Subcategory
C	Construction	<ul style="list-style-type: none"> ■ Woodworkers and carpenters ■ Construction workers ■ Steel fixers and concrete placers ■ Electric Fitters ■ Sheet metal workers ■ Roofers, pavers, masons and plasterers ■ Heavy equipment operators ■ Finishing works specialists
D	Information and Communication	<ul style="list-style-type: none"> ■ Programmers ■ Mobile application developers ■ Desktop software developers
E	Accommodation and Catering	<ul style="list-style-type: none"> ■ Cooks ■ Bakers ■ Chefs and Pastry chefs
7. Romania		
A	Manufacturing	<ul style="list-style-type: none"> ■ Unskilled assembly workers ■ Unskilled workers in the ready-made-garment industry ■ Manual packers ■ Loaders/ Unloaders
B	Freight	<ul style="list-style-type: none"> ■ Truck/ heavy duty vehicle drivers ■ Security guards ■ Cargo handlers ■ Car and van drivers
C	Sales	<ul style="list-style-type: none"> ■ Salespersons ■ Shopkeepers ■ Shop sales assistants
D	Construction	<ul style="list-style-type: none"> ■ Unskilled construction workers
8. Croatia		
A	Construction	<ul style="list-style-type: none"> ■ Building construction worker ■ Masons ■ Steel benders ■ Carpenters ■ Concrete layers ■ Plasterers ■ Construction fitters ■ Construction machinery operators ■ Civil engineering workers ■ Crane operators ■ Pipelayers ■ Painters ■ Roofers ■ Plumbers
B	Information Technology	<ul style="list-style-type: none"> ■ Software developers ■ User interface designers ■ System administrators

S.No.	Demand Sector	Subcategory
C	Accommodation and Catering	<ul style="list-style-type: none"> ■ National cuisine chefs ■ Butchers ■ Bakers ■ Confectioners ■ Bartender ■ Barista
D	Freight and Others	<ul style="list-style-type: none"> ■ Truck drivers ■ Semi-trailer truck drivers ■ Car mechanics ■ Car painters ■ Car bodyworkers
9. Malta		
A	Wholesale and Retail	<ul style="list-style-type: none"> ■ Shop Supervisor ■ Delivery person
B	Hotels and Restaurants	<ul style="list-style-type: none"> ■ Kitchen Hand ■ Cleaner ■ Cook ■ Chefs ■ Waiter/ Waitress
C	Construction	<ul style="list-style-type: none"> ■ Labourer Building Construction ■ Machine Operator ■ Building Electrician ■ Bricklayers and Stonemasons ■ Steel Worker ■ Handyperson/ Maintenance
D	Transport	<ul style="list-style-type: none"> ■ Motorcycle driver
E	Healthcare and social work	<ul style="list-style-type: none"> ■ Care Worker
F	Others	<ul style="list-style-type: none"> ■ Clerk ■ Security Guard ■ Labourer (Including Factory Hand Unskilled Labourer) ■ Print Finishing and Binding Workers
10. India		
A	Construction	<ul style="list-style-type: none"> ■ Supervisor and Foreman Masons ■ Steel benders ■ Carpenters ■ Concrete layers ■ Plasterers ■ Construction fitters ■ Construction machinery operators ■ Civil engineering workers ■ Crane operators ■ Pipelayers ■ Painters

S.No.	Demand Sector	Subcategory
B	Electrical and Mechanical Workers	<ul style="list-style-type: none"> ■ Electricians ■ Machine Operators ■ Mechanics ■ Car Mechanics ■ Fitting ■ Lathe Machine operators
C	Elementary Occupations	<ul style="list-style-type: none"> ■ Waiter, Cook, Bartender, Housekeeping, Nursing, Day Care, Service Technicians
D	Service and Sales	<ul style="list-style-type: none"> ■ Salespersons, Storekeeper, Receptionist, Service Technicians
11. Republic of Korea		
A	Construction	<ul style="list-style-type: none"> ■ Building construction worker ■ Masons ■ Steel benders ■ Carpenters ■ Concrete layers ■ Construction machinery operators ■ Civil engineering workers ■ Crane operators
B	Information Technology	<ul style="list-style-type: none"> ■ Software developers ■ User interface designers ■ System administrators
C	Accommodation and Catering	<ul style="list-style-type: none"> ■ Bakers ■ Confectioners ■ Bartender ■ Barista
D	Electrical Workers	<ul style="list-style-type: none"> ■ Electricians ■ Machine Operators ■ Mechanics
12. Japan		
A	Agriculture	<ul style="list-style-type: none"> ■ Meat processing ■ Cattle (Sheep, Beef) and Grain Farming ■ Fruit and Tree Nut Growing ■ Mushroom and Vegetable Growing
B	Aviation	<ul style="list-style-type: none"> ■ Airport Staff ■ Helper
C	Construction	<ul style="list-style-type: none"> ■ Building cleaning ■ Material processing
D	Food service industry	<ul style="list-style-type: none"> ■ Fisheries ■ Food and beverage processing ■ Waiter ■ Cook ■ Bartender

S.No.	Demand Sector	Subcategory
E	Industrial machinery manufacturing	<ul style="list-style-type: none"> ■ Machine Operator ■ Electrician ■ Steel Worker
F	Health	<ul style="list-style-type: none"> ■ Nursing care
G	Automobile maintenance	<ul style="list-style-type: none"> ■ Specialized Car Mechanics ■ Bodyshop Workers ■ Car Repairs
H	Service	<ul style="list-style-type: none"> ■ Electric and electronic information
13. Portugal		
A	Software	<ul style="list-style-type: none"> ■ Engineers (Diploma)
B	Tourism	<ul style="list-style-type: none"> ■ Guides, Translators
C	Hospitality	<ul style="list-style-type: none"> ■ Bartender, Cooks, Waiters, Staff, Housekeeping, Cleaners, Laundry
D	Call Centres	<ul style="list-style-type: none"> ■ Tele callers
E	Nursing	<ul style="list-style-type: none"> ■ Day-care, Senior citizen care
F	Real Estate	<ul style="list-style-type: none"> ■ Real Estate Agents
14. Malaysia		
A	Agriculture	<ul style="list-style-type: none"> ■ Meat processing ■ Cattle (Sheep, Beef) and Grain Farming ■ Fruit and Tree Nut Growing ■ Mushroom and Vegetable Growing
B	Energy	<ul style="list-style-type: none"> ■ Solar Panel Installers ■ Electricians
C	Transport	<ul style="list-style-type: none"> ■ Truck drivers ■ Semi-trailer truck drivers ■ Car mechanics ■ Car painters
D	Construction	<ul style="list-style-type: none"> ■ Supervisor and Foreman ■ Masons ■ Steel benders ■ Carpenters ■ Concrete layers ■ Plasterers ■ Construction fitters ■ Construction machinery operators ■ Civil engineering workers

e) Training programs

The formal system involves programmes like short-term training program, professional training program, secondary level education (including diploma level program) and technical higher education program. Our primary research survey indicates that **18-25 years age group is the highest enrolled in training programs followed by 26-30 years age group**, and the proportion of those under the 18 years age group is minimal. It shows the wider participation from young population.

A key observation was that the course which was provided the most by the training institutions and which was also the most popular among trainees was the one related to sales and services. It shows that sales and services is a common segment which falls under high demand and high supply area. It indicates that the courses of the domestic training institutions are market demand driven.

The short-term training in Nepal focuses on traditional occupations, but lags in market demand driven occupations such as Information Technology, Software Development, Artificial Intelligence, etc.

In our survey interaction with 63 training institutions (TIs), it was observed that aspirant migrants are the major training takers (as told by 36 TIs). It suggests that the coming generation is also interested in working overseas.

To gauge the usefulness of such courses, we gathered insight on whether training institution-based trainings are recognized by destination countries or not. The response was found to be positive (as 33 out of 63 TIs agreed). It is further substantiated with interaction with Private Recruitment Agencies (PRAs). 48 PRAs out of 50 PRAs mentioned that skill programs are applicable in destination countries. It shows that such courses are useful for the migrants when they enter into the labour force of the destination country. Even preferred trainings are in the field of services and sales which is the most in-demand field. Even most of the recruitment agencies also approach training institutions for picking the (aspirant) migrants who are taking training under the services and sales category. It shows training institutions are moving in synchronization with market demand.

The same observation also resonates with the domestic market. The top hiring industry that emerged in the domestic market is also services and sales. It offers an insight for GoN to take some conducive steps such as sector-specific budget stimulus in fostering services and sales segment.

f) Age structure

As per the Nepal Labour Migration Report 2020, the average age of male returnees is 33 years whereas it is ~30 years for females. The largest proportion is from the age bracket of 25-34 years followed by 35-44 years.

g) Recruitment agencies

There are 864 active private recruitment agencies (PRAs) as per DoFE. Due to their extensive support in migration, they are being preferred by migrants while going abroad. The traditional countries like Saudi Arabia, Qatar, Malaysia, and UAE still prevail in terms of top countries where PRAs send the migrants. There is also a need of PRAs to send migrants to multiple destination countries (and not stick to 1-2 destination countries only). It will be a win-win for both PRAs and migrants as PRAs will get more business opportunity whereas migrants will get wider employment options.

The semi-skilled category is the dominant category of migrants approaching PRAs and the one going to destination countries. There seems to be a shift from low skilled to semi-skilled migrants.

There are prevailing issues with PRAs such as higher recruitment fees, human rights violation, policy level issues, excessive concentration of PRAs and lesser focus towards emerging countries. It calls for government level interventions to strengthen the PRA system.

Learning and Sharing Event – Generating Evidence for future skills needs of migrant workers in Nepal

A glimpse of Learning and Sharing Event – Generating Evidence for future skills needs of migrant workers in Nepal held on 13 December 2022 at Hotel Aloft, Kathmandu is highlighted below.

Figure 1- Photographs of Learning and Sharing Event – Generating Evidence for future skills needs of migrant workers in Nepal



RECOMMENDATIONS

This report has assessed the challenges and gaps in the prevailing scenario. For remedy, some actions have to be taken. Some of the recommendations are –

- Males outnumber females in the migration outflow. It shows that there is still an untapped potential lying with GoN to harness and bring remittance from female sections also. The government should come up with policy interventions required to ensure their safety along with monitoring and compliance of their on-ground situation. The increased safety aspect would propel the female participation.
- As sales and services is the leading sector, there is a need for facilitating ease of business in this segment. As it holds future potential also, training institutions can design specific courses in line with this segment requirement. Such courses can be designed in consultation with the domestic and destination country-based employers.
- The Government of Nepal can come up with innovative mechanism like MoUs with emerging countries. Even GoN should liaison with targeted destination countries and revise or frame policies with an objective of protecting rights and wellbeing of migrants.
- Recruitment agencies cater a big proportion of migrants. They also play a critical role in matching the job demand and supply. Hence, the challenges faced by them should be addressed in consultation with them. They should also be incentivized to explore emerging destination countries.
- Merger of PRAs should be promoted through policy and regulatory interventions. Currently, there are huge numbers of PRAs in Nepal which are catering to one or two destination countries only. Even FEA 2007 is amended to facilitate mergers among PRAs so that they can cater to multiple countries. A provision was added to Section 13 Subsection 2 of the FEA 2007 with the purpose of regulating mushrooming of PRAs in Nepal.²
- We have found that many job opportunities are coming up in the clean energy sector (renewable energy, electric vehicle, etc.) and Information Technology but specific courses on such sectors are limited as of now in Nepal. Hence, the training institutions should develop updated courses.
- Training certification is provided by technical institutions which are agencies that run on CTVET prescribed courses. It has been found in the survey that these are well acceptable by destination countries. But because of multiple bodies involved in this certification process, there is a state of confusion. Hence, to avoid this, a central government level body can be formed to streamline this process. This central body will also help in easier recognition of certificates by destination countries.

2. rajpatra.dop.gov.np/welcome/book/?ref=23616&fbclid=IwAR18aLDKJRvHN5CZUx7_mZliOnTAJubkOYeD44A_FriTxy8p9Wmwjsg

- **Identify the returning migrant workers:** State authorities, particularly, MOLESS should concentrate on immediate priorities of returning workers. The priorities should focus on personal and demographic identification of the workers and their current living conditions.
- **Place the migrant workers and their issues first:** In the profit-oriented mode of production, the value of work is generally ignored during crisis, such as the one posed by COVID-19. Such crises are instead seen as an opportunity to earn extra benefits by laying off employees, reducing payment or forcing the employees to stay on unpaid leaves. Several immigrant labourers faced such troubles during the pandemic. Their addressal requires a specific policy providing for care and support to those who are at risk or are in the state of uncertainty of work.
- **Set in place a monitoring system:** In order to reduce the risk of exploitation and abuse of migrant workers in general and women migrant workers in particular, an effective mechanism should be in place to regularly monitor the situation of the workers, particularly of those in the unregulated sectors such as domestic work, in particular in the Gulf countries. The outcomes of monitoring should be regularly reviewed with the formation of a query dedicated manpower cell which would be entrusted with responding to the various issues and queries of migrants.

REPORT STRUCTURE

There are multiple chapters in this report. **Chapter 1** starts with background of this report. It captures key objective of this study, methodology adopted, data quality and limitations of this study. **Chapter 2** analyses the migration landscape of Nepal capturing through aspects of returnee and aspirant migrants.

Chapter 3 is dedicated to destination countries focusing on their selection approach. It is followed by **Chapter 4** on selected emerging destination countries. It covers destinations in terms of ongoing migration trend, emerging jobs and skill requirement and how Nepalese migrants can be subsumed in these countries.

Chapter 5 focuses on the backbone of skill development process. It focuses on the skill training system of Nepal. It is useful in assessing the skill supply side. Then, next chapter is on recruitment process as discussed in **Chapter 6**. Skilling of Nepali youth is covered in **Chapter 7** along with reintegration of returnee migrants in **Chapter 8**.



CHAPTER I

INTRODUCTION

1 Background

Migration is an economic and social phenomenon for Nepal with a link to development. The remittance received contributes positively to the upliftment of Nepalese citizens' lifestyle. COVID-19 pandemic caused a dent on this phenomenon. But with easing of COVID-19 restrictions and with potential of demographic dividend, Nepalese migrants are ready to restart their previous life. The pandemic acted as a wake-up call to prioritize the preparation for the return, repatriation and reintegration of the migrants while also utilizing skills, investments and network of the migrants and diaspora for national development.

For this, a key role would be played by the migrants' skill. It can be in terms of skill already gained in the foreign destination countries or learnt while residing in Nepal. It provides a window to gain out of demographic dividend, but its success would lie in **identification of skills and its alignment with the market need in domestic and destination countries (along with emerging countries)**.

IOM is keen to assisting stakeholders of Nepal in this realm. It is a complying member of **Global Compact for Migration (GCM)**.

1.1 GCM and IOM involvement

On 19 September 2016, Heads of State and Government came together for the first time ever at the global level within the UN General Assembly to discuss issues related to migration and refugees. This sent a powerful political message that migration and refugee matters had become major issues squarely in the international agenda. In adopting the **New York Declaration for Refugees and Migrants**, the 193 UN Member States recognized the need for a comprehensive approach to human mobility and enhanced cooperation at the global level.

Annex II of the New York Declaration set in motion a process of intergovernmental consultations and negotiations towards the **development of a Global Compact for Safe, Orderly and Regular Migration**. This process concluded on 10 December 2018 with the adoption of the Global Compact by the majority of UN Member States at an Intergovernmental Conference in Marrakesh, Morocco, followed closely by **formal endorsement by the UN General Assembly on 19 December 2018**.³

The **Global Compact** is the first inter-governmentally negotiated agreement, prepared under the auspices of the United Nations, covering all dimensions of international migration in a holistic and comprehensive manner. It is a non-binding document that respects states' sovereign right to determine who enters and stays in their territory and demonstrates commitment to international cooperation on migration. It presents a significant opportunity to improve the governance of migration, to address the challenges associated with today's migration, and to strengthen the contribution of migrants and migration to sustainable development. The Global Compact is framed in a way consistent with **target 10.7 under Goal 10 ("Reduced Inequality") of the 2030 Agenda for Sustainable Development in which Member States committed to cooperate internationally to facilitate safe, orderly and regular migration**.⁴ The Global Compact is designed to:

3. <https://www.iom.int/global-compact-migration>.

4. [research-paper-xii-regional-processes.pdf](#) (ceslam.org).

- Support international cooperation on the governance of international migration;
- Provide a comprehensive menu of options for States from which they can select policy options to address some of the most pressing issues around international migration; and
- Give states the space and flexibility to pursue implementation based on their own migration realities and capacities.

There is a **GCM Objective 18** which deals with skills. It states to “Invest in skills development and facilitate mutual recognition of skills, qualifications and competences”. One of the measures under this objective is to work on inclusive employment policies that provide equal opportunity and equal treatment for migrant (and especially women) in the labour market, including through recognition of existing skills and qualifications and targeted vocational training and skills development. This report is also an effort under this measure.

Considering migration related agenda, IOM is thus involved in assisting migrant-based economy of Nepal.

1.2 Migration and SDG objective

The 2030 Agenda for Sustainable Development recognizes that migration is a **powerful driver of sustainable development**, for migrants and their communities. It brings significant benefits in the form of skills, strengthening the labour force, investment and cultural diversity, and contributes to improving the lives of communities in their countries of origin through the transfer of skills and financial resources.

The IOM **Institutional Strategy on Migration and Sustainable Development** outlines a whole-of-organization approach to comprehensively integrate migration and development into policymaking and programming within IOM. It recognizes that migration, when well managed, can be both a development strategy and a development outcome.

The Strategy represents IOM’s direct contribution to the Decade of Action to fast-track progress for reaching the Sustainable Development Goals.

1.3 Objectives of the study

It is critical that the current need of skill identification and its alignment with market demand is to be worked upon. One of the ways can be through working on the following three elements –

- Generate evidence on future skills needs,
- Promote the upskilling of migrant workers and
- Identify new opportunities for migrant returnees.

Considering above elements, this is an extensive report on macro level supply and demand analysis of skills that provide in-depth information on existing skills training being provided, market diagnostics on how trained personnel are recruited by the private recruitment agencies of Nepal, demands in destination including identifying new and emerging job markets both within the country and overseas.

1.4 Scope of work

The following is the list of tasks to be performed. These are based on the recommendations made by IOM's study conducted through the support from the European Commission and recommendations of the Nepal Migration Profile to renew focus on upskilling of the migrant workers and identify new opportunities to the returnee with special focus to maximise the potential of women returnee migrant workers.

- To map existing training institutions in Nepal, register the type of trainings provided.
- Market diagnostics on how the trained personnel are recruited by private/public sector in Nepal and how the private recruitment agencies utilize the skills of the trained personnel in job matching with opportunities available in various countries of destination. This has to consider pre and post COVID-19 situations and how the training institutes have realigned to meet the demands of COVID affected markets.
- It should assess employment trends in skilled, semi-skilled and lower-skilled categories of demands in various destinations, map new and emerging job markets in various destinations and identify key areas and sectors including green jobs or the ones that promote green economies that will align with Nepal's human resources or based on its ongoing skills programme.
- Specific section on the nine countries that has Memorandum of Understanding, Memorandum of Cooperation, Bilateral Agreements, other inter-country agreements, etc., signed with Nepal.
- Providing list of skillset areas in which further trainings could be considered to generate high earning by the Nepali migrant workers.
- To identify what type of jobs are available in the Nepali market that can be filled by TVET graduates, with a special focus on high demand innovative skills, potential for business links between small enterprises and the growing formal sector.

These activities have been segregated into various chapters of this report as detailed below.

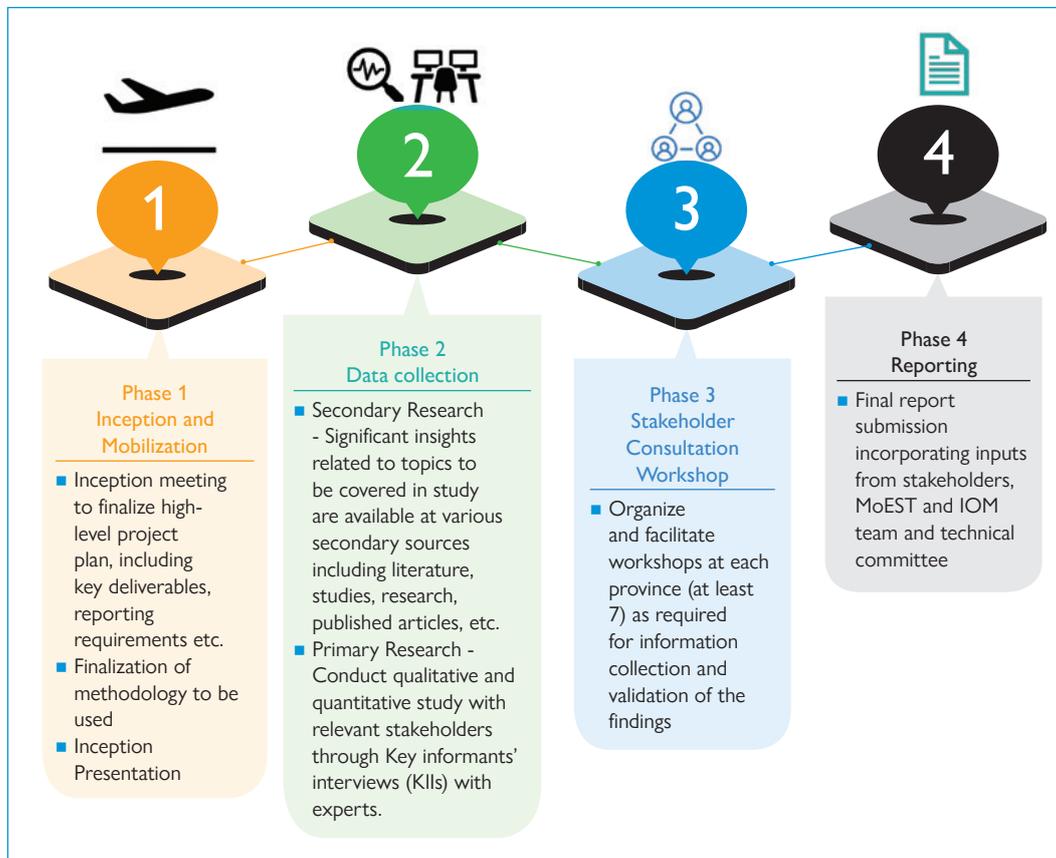
Figure 2- Chapter-wise segregation of activities

S. No.	Scope as per ToR	Covered in our report as...	
1	Mapping of existing training institutions in Nepal	1	1 Nepal existing Skill Training System
2	Type of trainings being provided (pre and post COVID-19)	1	
3	Market diagnostics on how the trained personnel are recruited by private/public sector in Nepal	2	2 Nepal Recruitment Process
4	How private recruitment agencies (PRAs) utilize the skills of the trained personnel in job matching with opportunities available in various countries of destination	2	
5	Selection of top 15 destination countries	3	3 Destination Countries for Nepalese Migrants
6	Assessment of employment trends in skilled, semi-skilled and lower-skilled categories of demands in various destinations	3	
7	Mapping of new and emerging job markets in various destinations	3	
8	Identification of key areas and sectors including green jobs	3	4 Special section on 9 countries
9	Specific section on the nine countries	4	
10	List of skillset areas in which further trainings could be considered to generate high earning by the Nepali migrant workers	5	5 Skill gap in existing training system
11	Type of jobs are available in the Nepali market that can be filled by TVET graduates	5	
12	High demand innovative skill	5	6 Linking SMEs with formal sector
13	Potential for business links between small enterprises and the growing formal sector	6	

1.5 Methodology adopted in the study

The execution of this study adopted four-step methodology as shown below.

Figure 3- Steps in the methodology



The detailed description of the steps is below.

1.5.1 Phase-1: Inception and Mobilization

It was a formative stage. The objective of the inception was to discuss the context, program details, key targeted outcomes of the study to finalize the approach as per the scope of work.

Secondary resources were discussed. Documents gathered using the secondary resources/desktop study was reviewed. It provided an in-depth understanding of data and information that is currently available and subsequently highlight the information that the EY-CESLAM team would seek to collect through interaction with stakeholders.

An inception report was submitted for IOM's approval.

1.5.2 Phase-2: Data collection

Secondary and primary research (survey) techniques were used for data collection purpose.

➤ For Secondary research -

For this part, we have collected various past reports and study materials obtained in public and through the support of IOM. A detailed listing of data resource with the relevant information was prepared. A snapshot of the table is shown below.

Figure 4- Secondary research source compilation

Data Source	File Name	Relevant Data	Language	Source Link
IOM	Mapping of Reintegration Services in Nepal – May 2022	<ul style="list-style-type: none"> Services available for reintegration of returnee migrant workers 	English	Mapping of Reintegration Services in Nepal IOM Publications Platform
IOM	Profiling Returnee Migrant Workers for Labour Market Integration – April 2022	<ul style="list-style-type: none"> Recent trends in migration Profile of returnee migrants (age, education, residence, etc.) Skills acquired in destination countries Post return profile 	English	Profiling Returnee Migrant Workers for Labour Market Integration IOM Publications Platform
IOM	Status of Nepali Migrant Workers in relation to COVID-19	<ul style="list-style-type: none"> Return and reintegration Plans Priority areas of returnee migrants 	English	Rapid Phone Survey_Final Report (iom.int)
CTEVT	Journal of TVET – February 2022	<ul style="list-style-type: none"> Types of TVET Programs Types of TVET Institutes Intake Capacity and Enrolment in different TVET Institutes 	English	TVET Journal Vol. 2 2022.pdf (ctevt.org.np)
CTEVT	CTEVT Mapping Website	<ul style="list-style-type: none"> Types and number of TVET Institutes operating in different modalities Types of different TVET Programs under CTEVT 	English	CTEVT Mapping System
CTEVT	A Glimpse of TVET in NEPAL 2076	<ul style="list-style-type: none"> English version is required 	Nepali	A Glimpse of TVET in NEPAL (एक झलक) (2076) (ctevt.org.np)

The main data sources are reports of IOM, CTEVT, MOLESS, UNDP, ILO, CBS, DOFE, World Bank, CESLAM, etc. It was supplemented with the various countries news cuttings and short journals.

➤ **For Primary research (surveys) –**

The study primarily involved mapping of relevant stakeholders and collection of data through qualitative interviews and surveys (administered with the help of closed-ended questions) with relevant government and non-government stakeholders that are associated with the vocational skills training and labour migration landscape in Nepal.

Its main steps are –

1. Stakeholder mapping
2. Qualitative interviews with stakeholders
 - a. In-depth interviews with government stakeholders
 - b. In-depth interviews with vocational training administering bodies and programs
 - c. Semi-structured interviews with other stakeholders which include representatives from private industry sector, migrant welfare organization, trade unions and local governments.
3. Survey with returnee migrant workers
4. Survey with aspirant migrant workers
5. Survey with other stakeholders
 - a. Short survey with private training providers affiliated with the government
 - b. Short survey with private recruitment agencies

The interview checklist is attached in the **Annexure 9**.

1.5.3 Phase-3: Stakeholder consultation workshop

We conducted this step to validate the key findings as obtained in the previous two steps. It was done on provincial basis. The key characteristics of these workshops are -

- Provincial consultations were organized by CESLAM in provincial capital of five provinces – Madhesh, Gandaki, Lumbini, Karnali and Sudurpaschim.
- The period for convening provincial consultations was 1 November 2022 to 7 November 2022.
- Two separate research teams from CESLAM organized concurrent consultations in different provinces at a time.
- Around 20 stakeholders representing various sectors including provincial and local governments, industry associations, trade unions and training institutions relevant to the study were invited for a half-day consultation.
- The main motive of the consultation was to validate the findings derived from the study. In doing so, CESLAM and EY India, presented their findings to the participating stakeholders. CESLAM also garnered pertinent information from the participating stakeholders from concerned Provinces and incorporate it into the report.
- The stakeholders were identified and finalized in consultation with IOM Nepal.

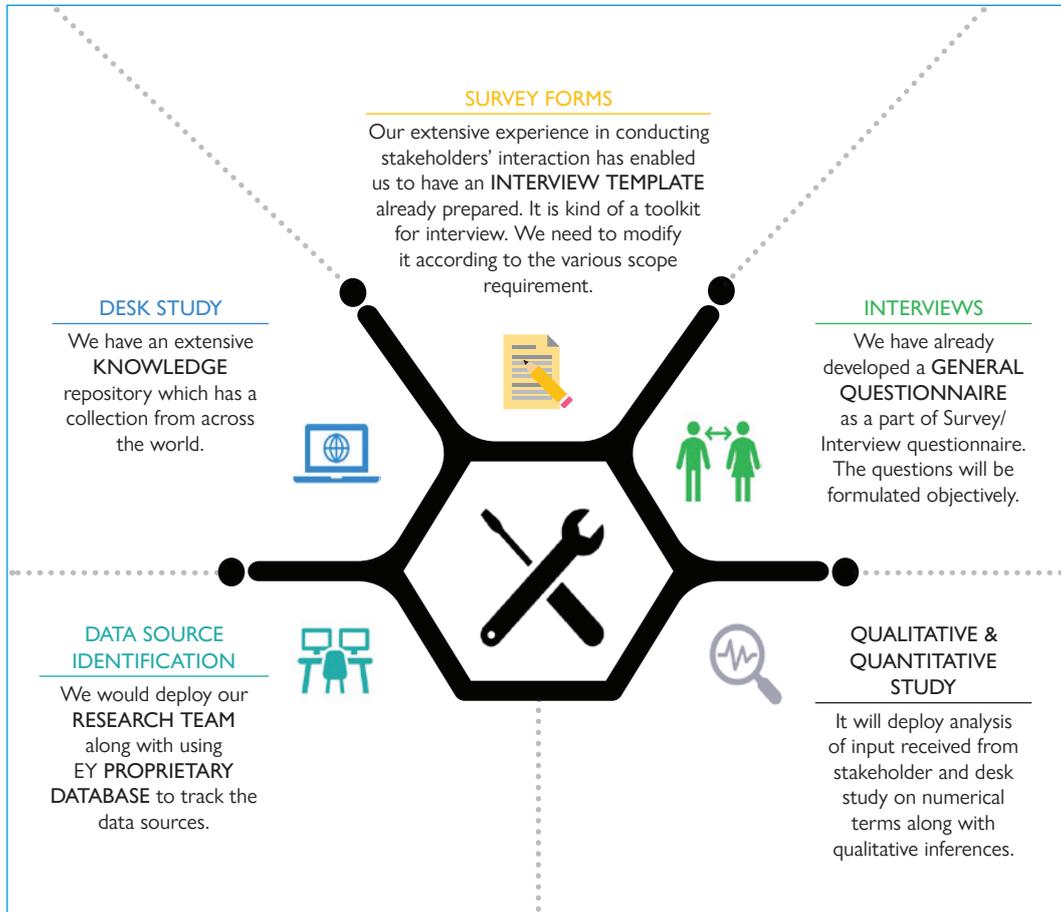
1.5.4 Phase-4: Reporting

This is the report being submitted for IOM and relevant stakeholder's input and feedback. Post receiving the input and feedback, the same was incorporated in the final report.

1.6 Tools deployed

The following diagram shows the tools deployed.

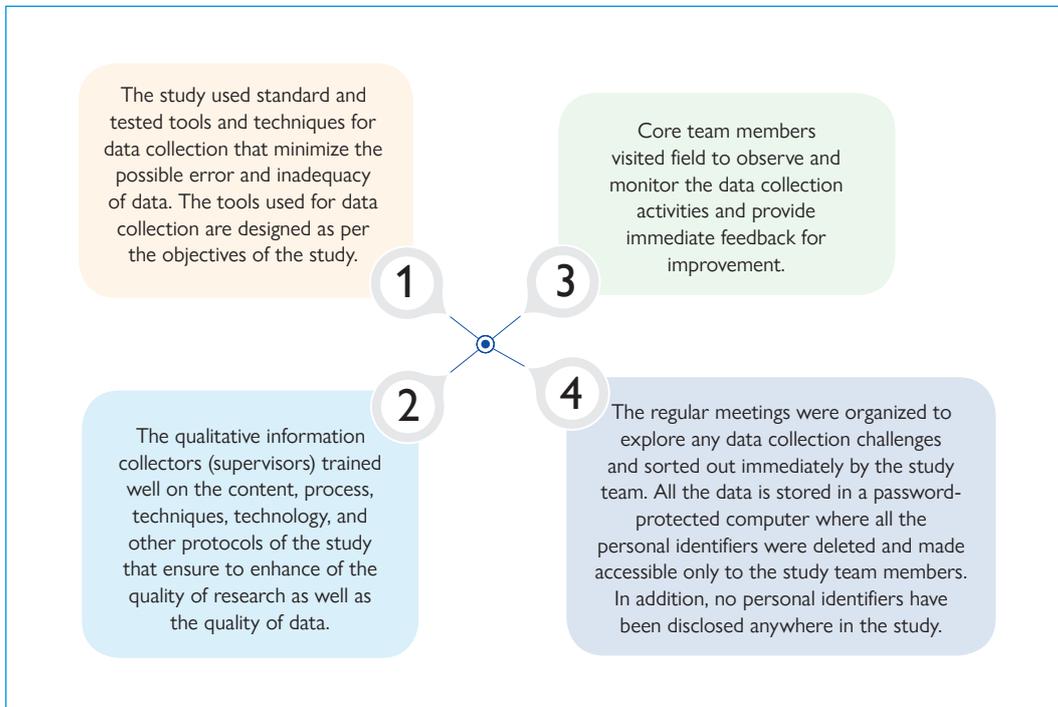
Figure 5- Tools deployed



1.7 Data quality assurance plan

The four aspects are shown below.

Figure 6- Aspects of data quality assurance plan



1.8 Limitation

The report may have following limitations –

- The data taken from Nepal Labour Migration Report is till 2018/19 as the latest report is of 2020 only.
- Primary interaction survey is done with a set sample size and hence the finding from primary interaction survey may not represent the universal picture.
- The parameter selected in the destination countries for analysis of employment opportunities may not be exhaustive.

In the destination countries, secondary research was performed. Hence, key insights shared may not be exhaustive in nature. For primary research, limited interactions could be done and hence insights being shared are non-exhaustive.



CHAPTER 2

MIGRATION LANDSCAPE IN NEPAL

2 Introduction

Nepal is a country which is blessed with immense youth population. It has a population of **29.19 million** as per Census Report 2021.⁵ With population's median age of 23.2 years, it holds immense growth potential. As per Nepal Labour Force Survey-III, it has working age (15+ years) population share of 71.5 per cent of the total population.

But labour migration has been primarily an **economic phenomenon** in Nepal, where a major population leaves home to foreign countries to earn livelihood for the families. As per IOM report, Nepal is the **fifth-most remittance-dependent country in the world**.

2.1 Snapshot of migration in Nepal

Emigrants' population represents the migration process. The first modern Census of Nepal in 1952/54 recorded that 2.3 per cent (198,120) of the total population were emigrants. This slightly increased to 3.4 per cent in the following Census in 1961.

After 1961, the trend in out-migration is almost constant until 2001 Census, which dramatically increased to 7.3 per cent (1,921,494) in Census 2011 and 7.4 per cent (21,69,478) in 2021.

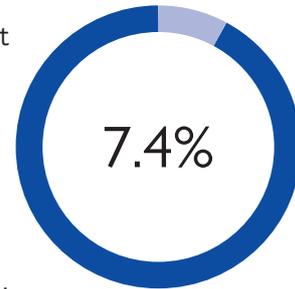
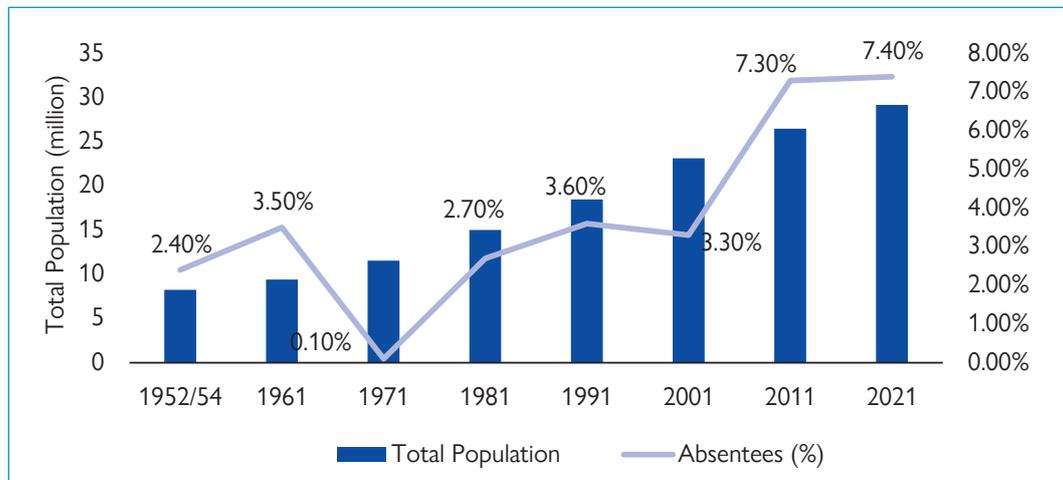


Figure 7- Emigrants population by census year, 1952–2021⁶

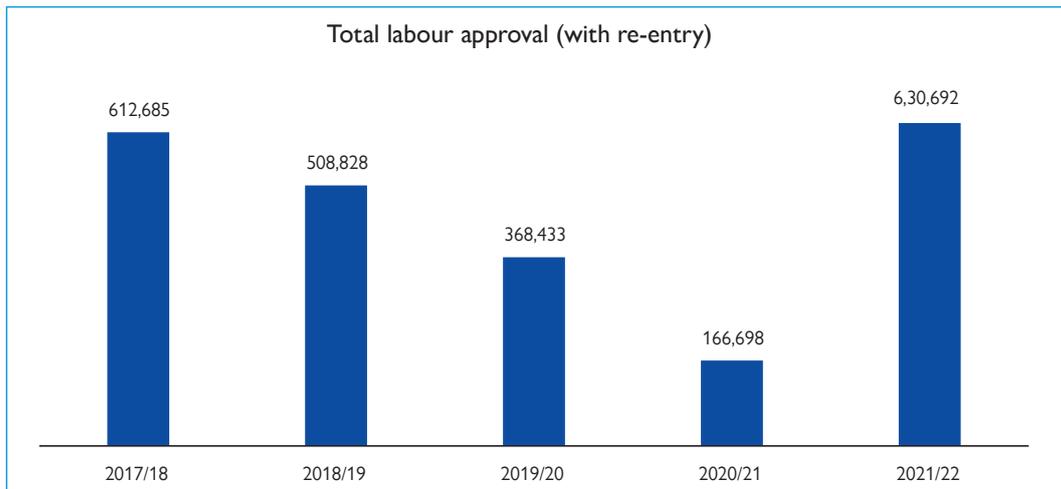


The migration trend can also be seen through issuance of labour permits. **Male migrants accounted for 90.5 per cent** in terms of work permits being issued in 2020/21.⁷

5. <https://censusnepal.cbs.gov.np/Home/Details?tpid=5&dcid=3479c092-7749-4ba6-9369-45486cd67f30&tfsid=17>.

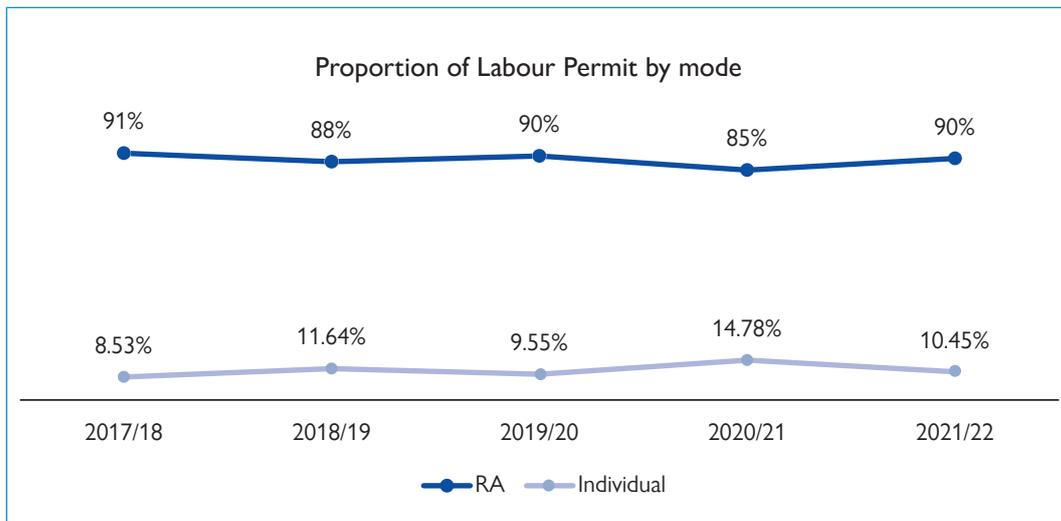
6. Source – IOM report.

7. MoLESS, Nepal Labour Migration Report 2022 (Kathmandu: MoLESS, forthcoming)

Figure 8 - Labour approval trend⁸

Labour approval trend decreased in 2020/21 due to COVID-19 pandemic but now it has increased again in 2021/22. It can be seen from the above graph.

There are two modes of issuance of labour permits – (i) through recruitment agencies (RA) and (ii) individually. From the below graph, it is reflected that share of RA exceeds individual issuance. Hence, taking support from RA is the preferred choice among migrants.

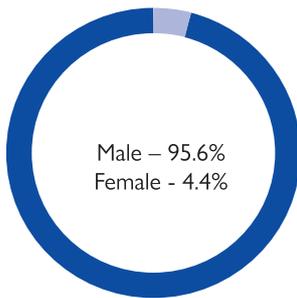
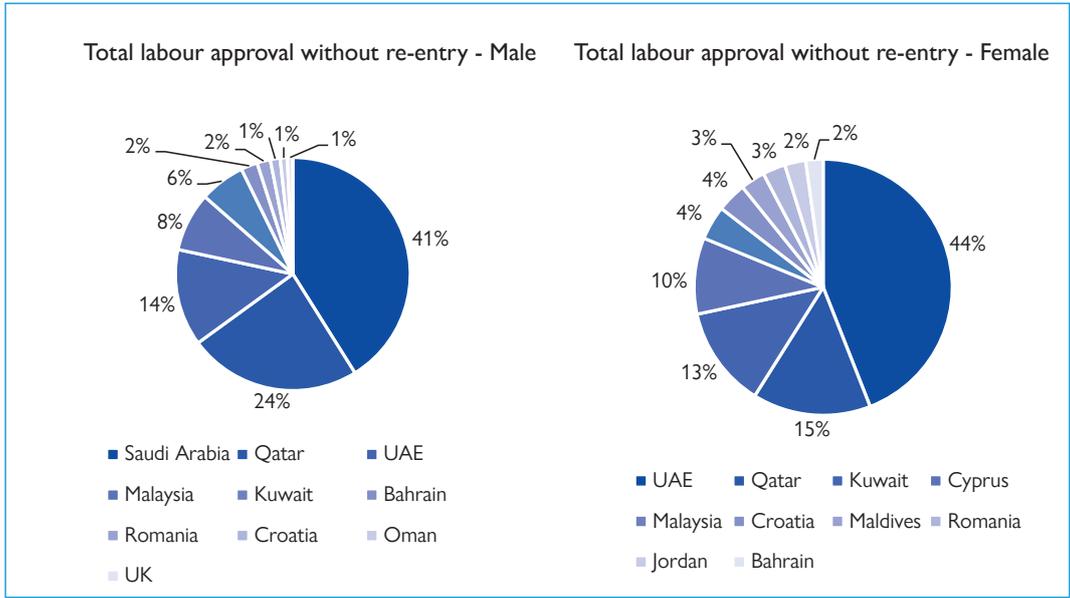
Figure 9 - Share of mode of labour permit⁹

There is a gender-wise distinction between favoured destination countries as reflected in the below figure.

8. DOFE website (Total Labour approval with re-entry).

9. DOFE website (Total Labour approval without re-entry).

Figure 10- Top destination countries gender-wise as per labour approval for FY 2021/22¹⁰



Countries like UAE, Qatar and Malaysia are favoured by both genders. But this is not the case with emerging countries which differs according to gender. **Males** are preferring to go to countries like **Croatia, UK and Oman**, whereas **females** are preferring to go to countries like **Cyprus, Croatia and Maldives**.

In terms of skill, major migrants are of unskilled type (54.8 per cent) followed by semi-skilled (27.13 per cent) when past 20 years' cumulative number of migrant workers who had received the final work permit were assessed. The share of women is meagre with 4.4 per cent only.

Figure 11- Past 20 years cumulative number of migrants receiving final work permit with skill classification¹¹

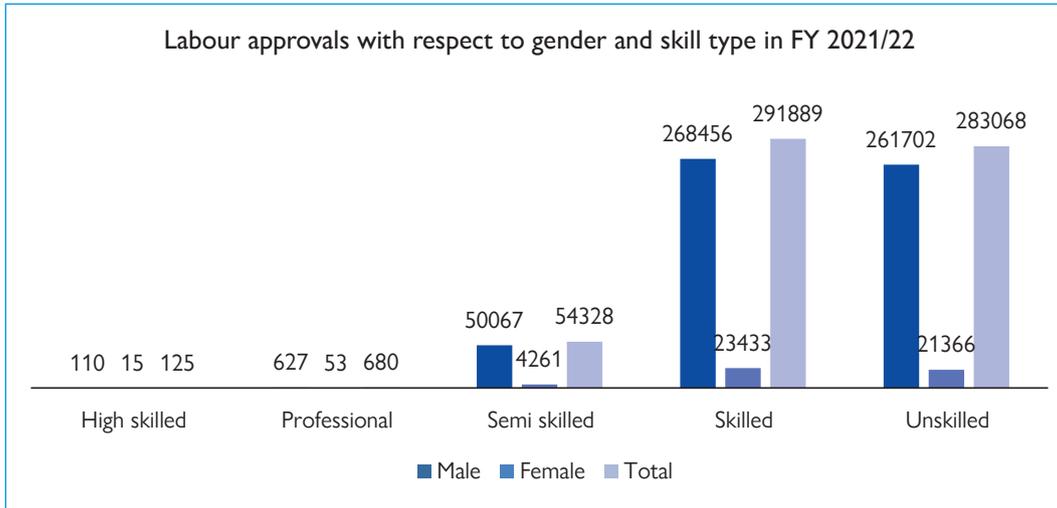


10. DOFE website (Total Labour approval without re-entry).

11. IOM report titled "Profiling Returnee Migrants Workers for Labour Market Integration."

As per latest data available in DOFE website, it shows that the share of skilled type labour approvals is the highest followed by unskilled type. This trend is observed in both genders. It shows the increased acceptance of skilled labour by destination countries along with increased supply of skilled labours by Nepal. This trend is shown in the below graph. Even share of female has increased to 8 per cent in FY 2021/22 from 4.4 percent which was in the last 20 years.

Figure 12- Number of migrants receiving labour approval with skill classification in FY 2021/22¹²

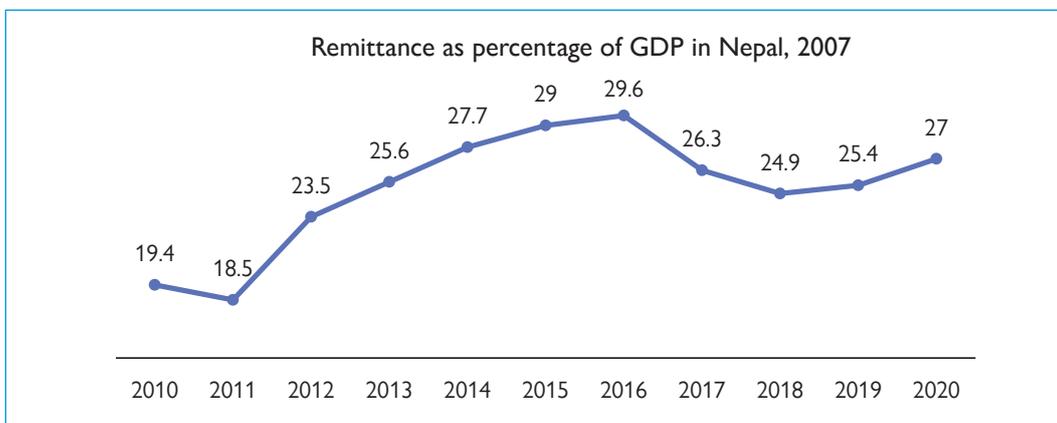


In terms of occupation, majority of migrants reported receiving labour permits for elementary work (54.8 percent) followed by services & sales (18 percent) and then construction (9.3 percent). There are some sections where females are non-existent such as construction, electrical and mechanical technician, fishery, poultry. But females are dominant in occupations of service and sales, manufacturing, office/administrative/associate professionals, aviation, and cruise and professional and managers.¹³

2.2 Migration and Nepalese economy

The significant share of migration phenomenon is reflected in Gross Domestic Product (GDP) of Nepal also. One of the measures of contribution from migration is reflected in the remittance share. In 2020, remittance captured 27 per cent share in its GDP as shown below.

Figure 13- Remittance share in GDP¹⁴



12. DOFE website (Total Labour approval without re-entry).

13. IOM report titled "Profiling Returnee Migrants Workers for Labour Market Integration".

14. Nepal Rastra Bank (as available at www.nrb.org.np).

It can be seen from the graph that remittance as share of GDP is continuously increasing from 2018 to 2020. It got affected due to physical restriction during COVID-19 time. The generated remittance in fiscal year FY 2020/21 was equivalent to NPR 961.05 bn which is increased to NPR 1.007 trillion in the final months of FY 2021/22.¹⁵

Labour migrants from Nepal are mainly males from working age groups which are majorly of unskilled type. As a result, the trend in foreign employment is concentrated towards selected countries like Gulf countries and Malaysia where unskilled employment is available.

Even though as per current scenario, traditional destination countries are employing unskilled labours, but it would sustain only in the short to medium term. It is so because they have the opportunity of exploiting their gas and oil reserves. But as the world is progressing and newer technologies (especially a shift from fossil fuels to new cleaner energy sources) are displacing existing technologies, need of skilled manpower is ought to be there.

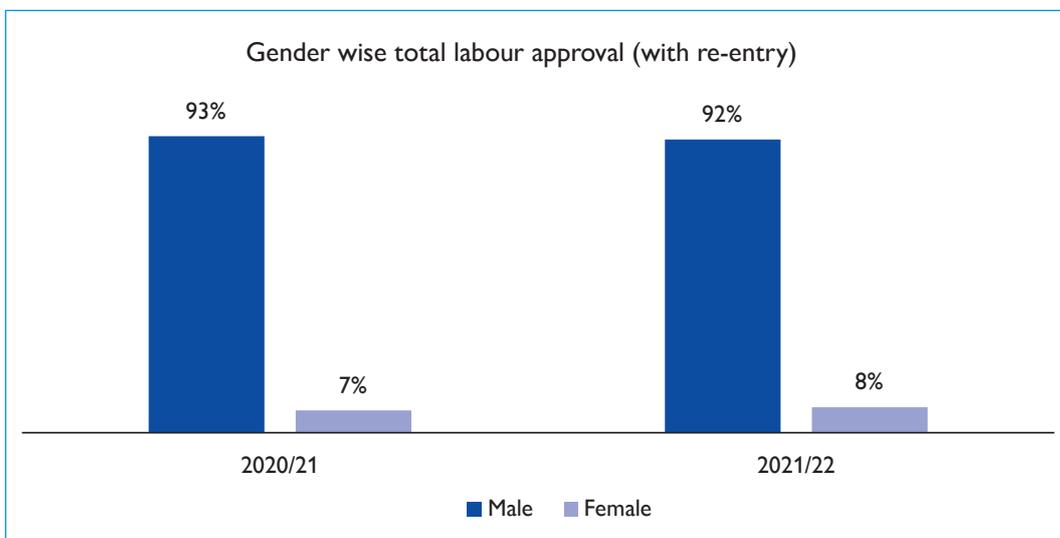
2.3 Nepal migrants' demographic scenario

The scenario can be represented in accordance to following aspects –

2.3.1 Gender aspect

Nepal migration is predominantly a male phenomenon.¹⁶ In 2018/19, only ~8.5 per cent was the share of female in migrants. The share of women has also raised to 8 per cent in 2021/22.

Figure 14- Gender wise total labour approval¹⁷



2.3.2 Geographical aspect

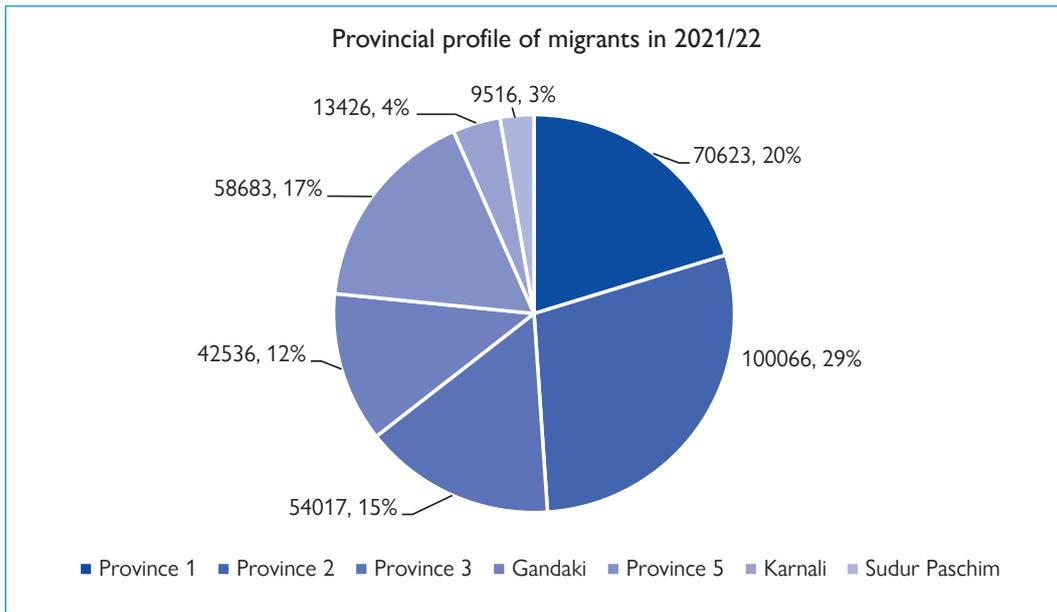
It can be seen from the figure below that Province 1 and Province 2 has the highest share of labour migration in 2018/19. This trend is maintained in 2021/22 also which can be observed in the graph below. Among these, UAE was the most popular destination country. This pattern differs for female where ~75 per cent of female workers hail from Province 1 and Province 3.

15. NRB Annual Report for 2020/21 Page 23.

16. Nepal Labour Migration Report 2020.

17. Source – DoFE.

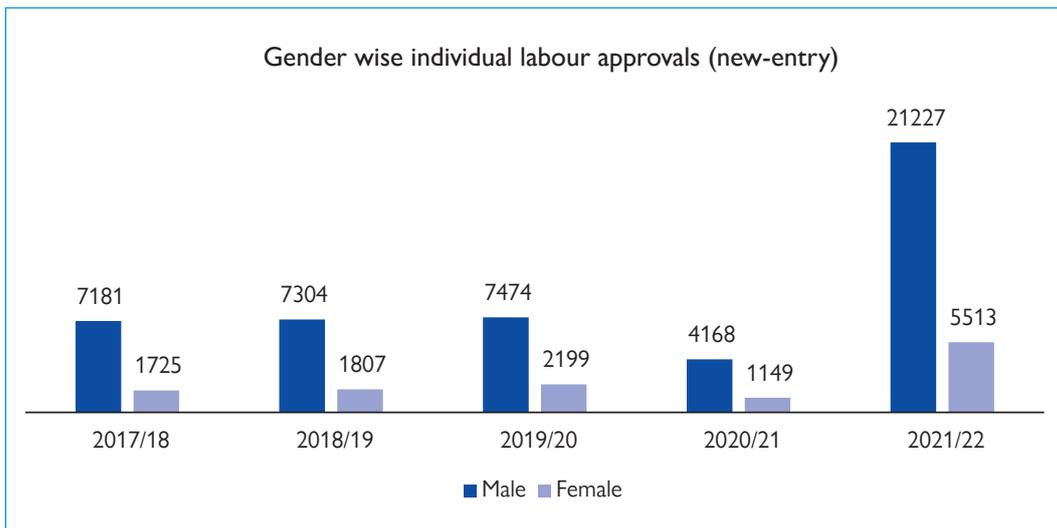
Figure 15- Provincial profile of migrants in 2021/22



2.3.3 Mode of approval

The migrants also opt for individual labour approvals even though its share is small. In the last 5 years, female share is 21 per cent (i.e., 12,393) in getting individual labour approvals.

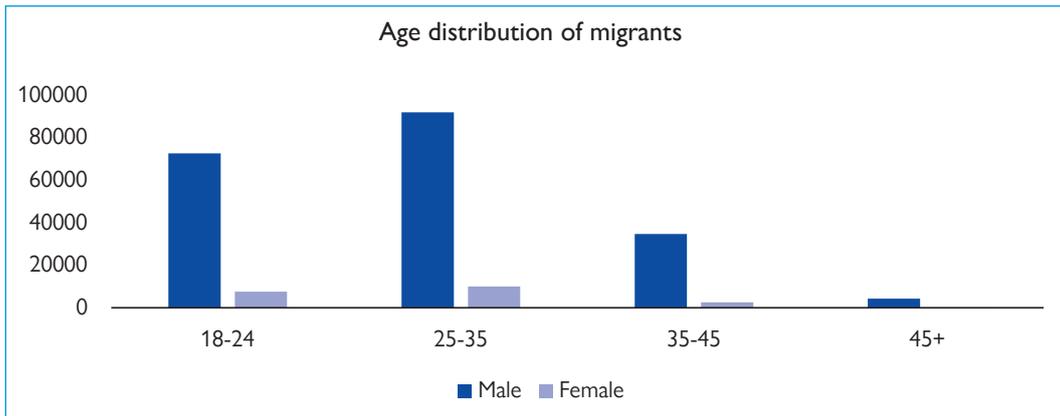
Figure 16- Gender-wise individual labour approvals¹⁸



2.3.4 Age

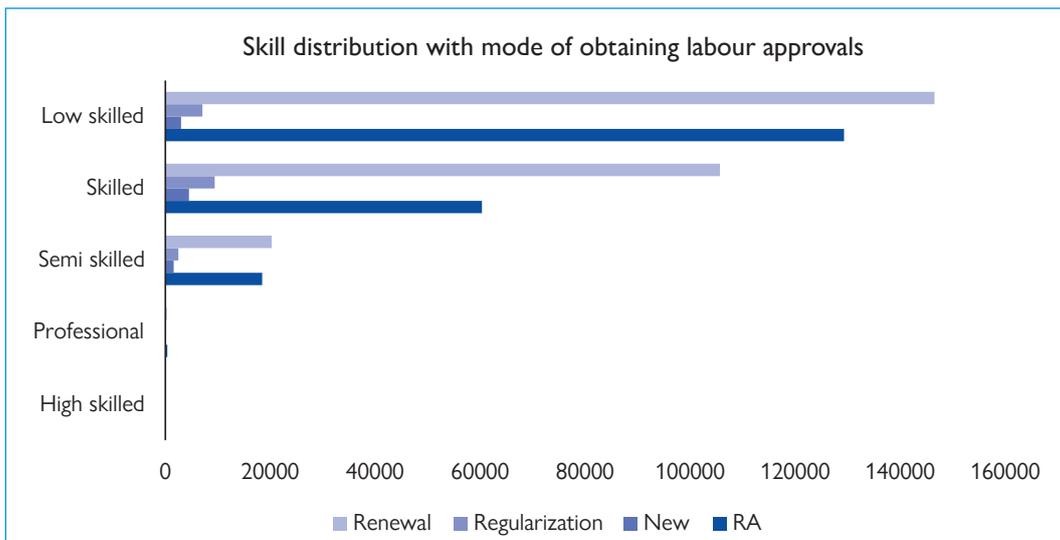
With 2018/19 data, mean age of migrant workers is 29 with 81 per cent share of 18-35 age group (45 per cent share of 25-35 and 36 per cent share of 18-24). Female workers are meagre in number with only 9 per cent share (i.e., 20,281) of total migrants.

18. DOFE website (Total Labour approval without re-entry).

Figure 17- Age distribution of migrants¹⁹

2.3.5 Skill distribution

It is seen that **low skilled** is the prevailing norm among migrants with 56 per cent share followed by skilled with 35 per cent share when considered cumulatively for all labour approvals mode. The **professional and high skilled** is meagre with combined share of 0.18 per cent share only.

Figure 18- Skill distribution with mode of obtaining labour approvals²⁰

2.4 Nepal returnee migrants' demographic scenario

The returnee migrants have significance in terms of productive use of financial and social remittances. They also support in providing skills, networks and know-how learned in abroad for national developmental priorities. The next section has captured insight on returnee migrants from two sources –

- **Secondary resource** - Nepal Labour Migration report 2020
- **Primary resource** - Primary interaction survey conducted in Nepal by EY-CESLAM team which includes interaction with **155 returnee migrants**.

19. Nepal Labour Migration Report 2020.

20. Nepal Labour Migration Report 2020.

Their scenario can be represented in accordance to following aspects –

2.4.1 Gender aspect

As per Nepal Labour Migration Report 2022, female share is only 6.64 per cent and hence majority of outgoing migrants are male.²¹

The male domination is also captured in primary interaction where male outnumbers female by four times.

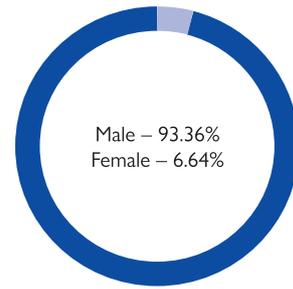
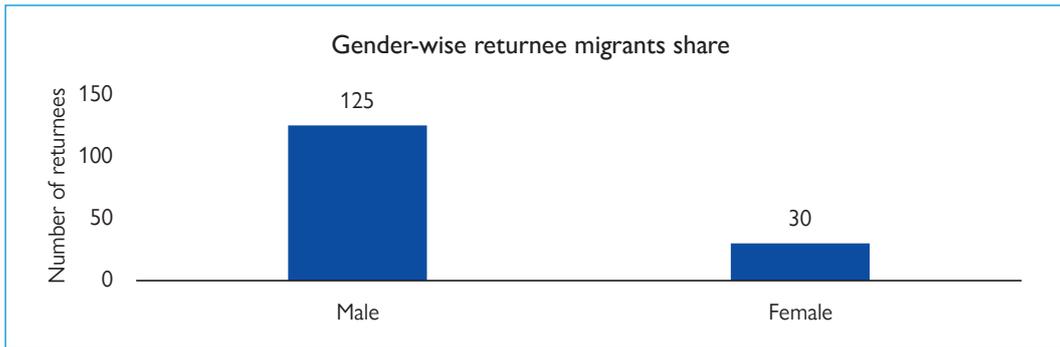


Figure 19- Gender perspective of returnees²²

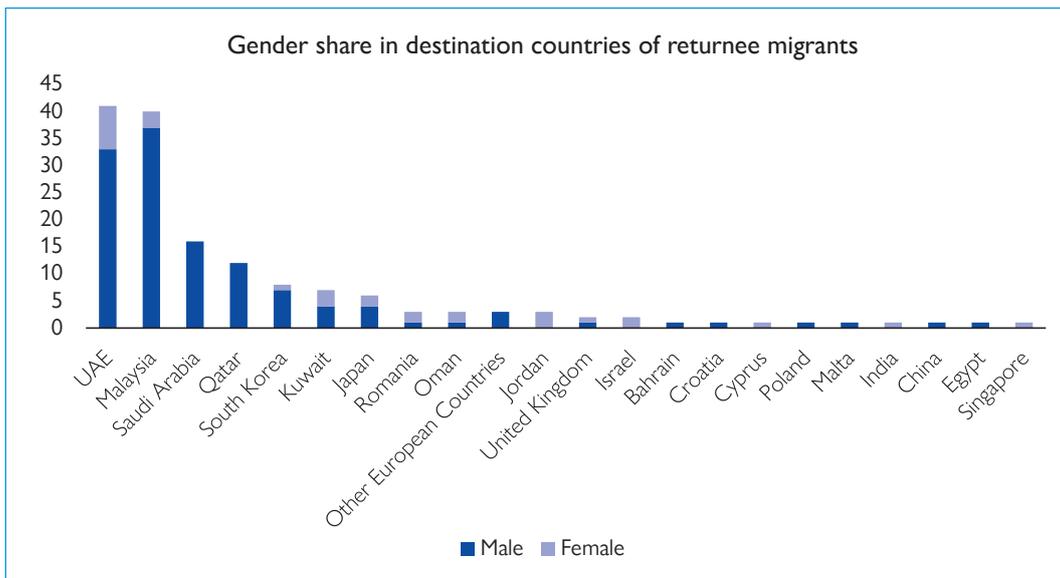


As observed in aspirant/ returnee migrant survey, in terms of destination countries, following are the key observations:

- In the emerging destination countries like Israel, Cyprus and Jordan, the participation from female is prevailing.
- Maximum share of female participation is seen in UAE.

The graph is shown below.

Figure 20- Gender perspective on destination countries of returnees²³



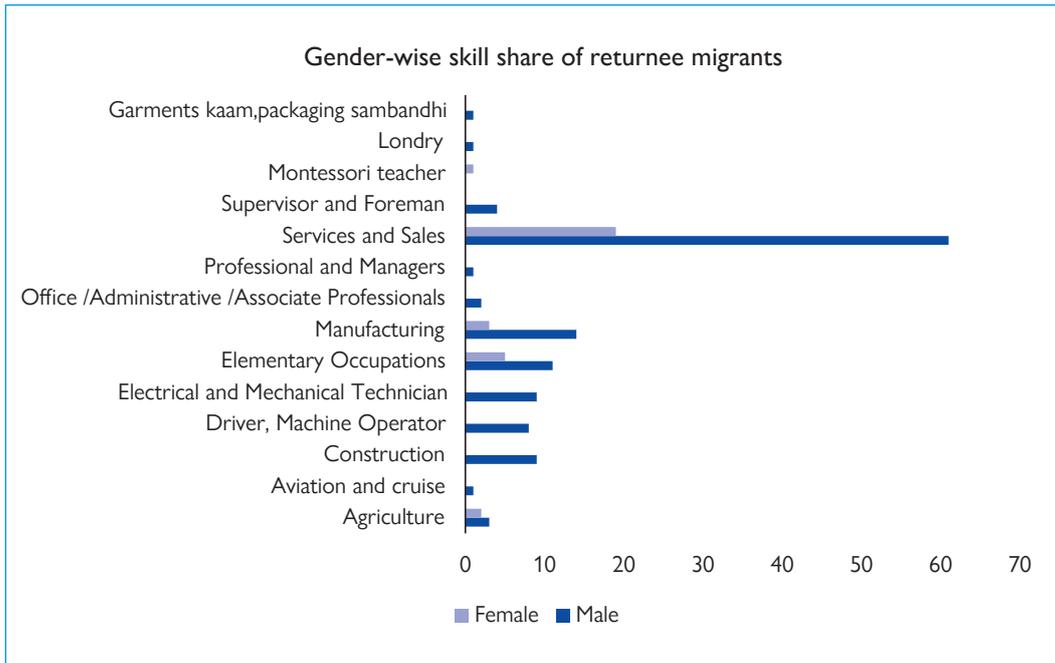
21. MoLESS, Nepal Labour Migration Report 2022 (Kathmandu: MoLESS, forthcoming)
 22. Source – EY-CESLAM primary research.
 23. Source – EY-CESLAM primary research.

In terms of skills from the gender perspective, following were observed –

- **Sales and services is the leading sector.** This sector is also leading in participation from both the genders.
- There is a **disparity in terms of gender preference of skills.** Sectors like technician, construction, driver are dominated by male whereas garments and Montessori teacher skills has female domination.

It can be seen in the below graph.

Figure 21- Gender perspective on skills of returnees²⁴



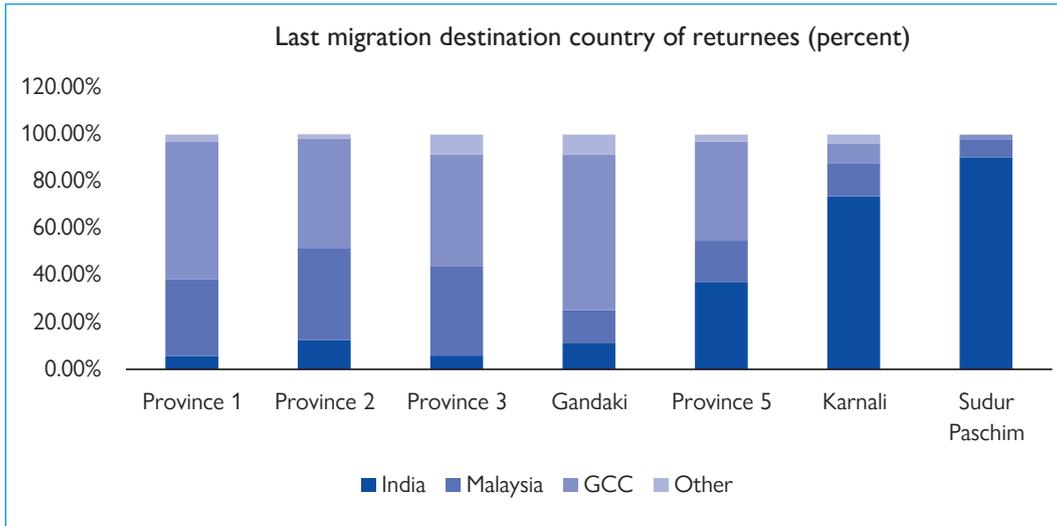
2.4.2 Geographical aspect

Geographical aspect for returnee migrants is being considered in terms of their last country. GCC countries were the most recent destination country for returnees with an overall share of 43.4 per cent. India's share was 25 per cent whereas Malaysia was 4.4 per cent.

There is a variation with respect to province also. **India is a preferred last country for province of Karnali and Sudur Paschim.** India is known for seasonal labour migration especially during off-farming season of Nepal. In the remaining five provinces, **GCC countries was the preferred choice.**

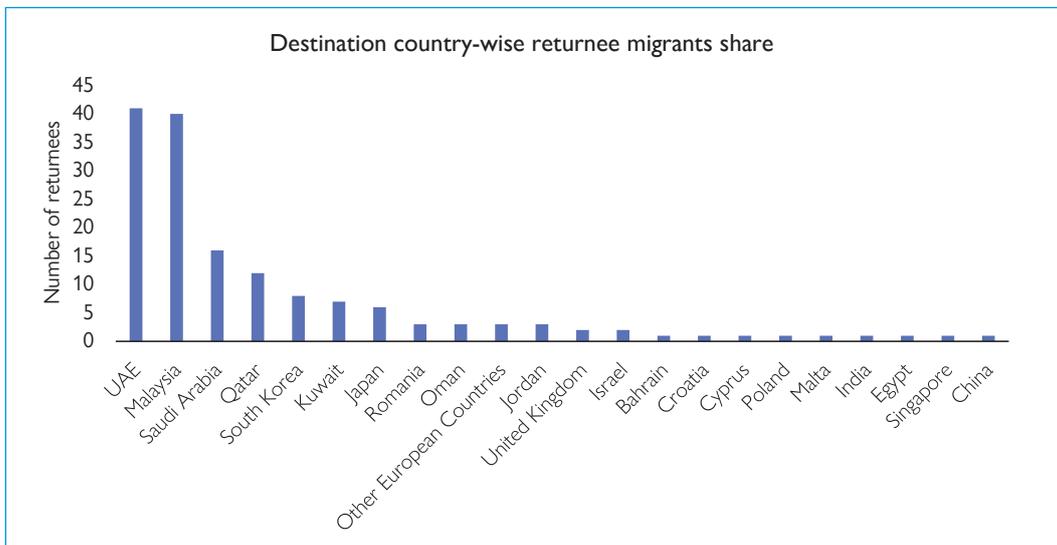
24. Source – EY-CESLAM primary research.

Figure 22- Province-wise share of last country of returnee migrants



In terms of destination countries as reflected in returnee migrant survey, GCC countries occupy major share but countries like Jordan, Israel, Cyprus, Poland, etc. are emerging too as shown below.

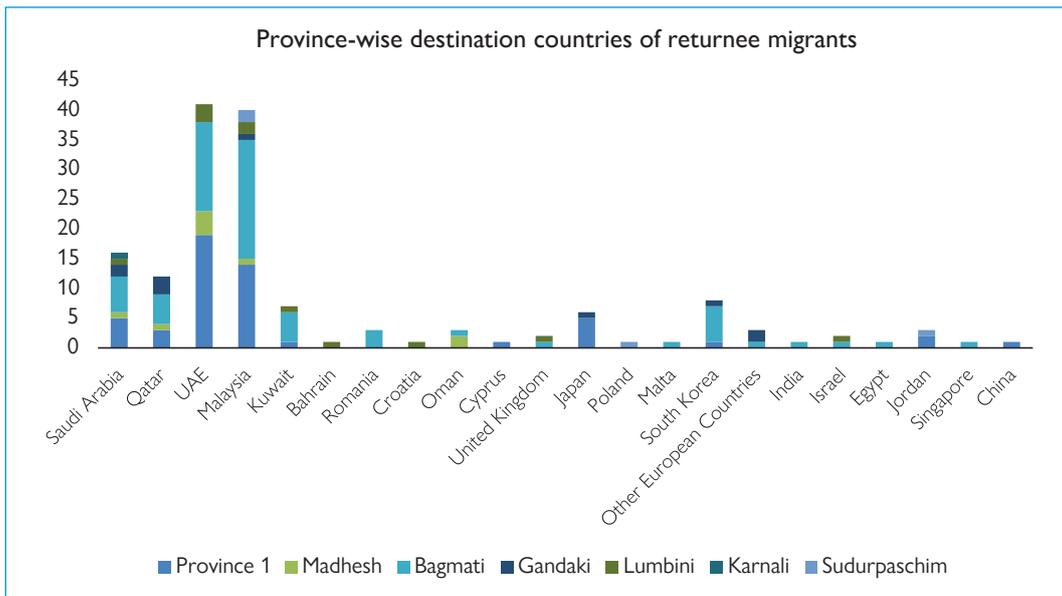
Figure 23- Destination country share in Returnee migrants²⁵



Even provincial level analysis was conducted among 155 returnees. It was observed that Bagmati and Province 1 has the highest share.

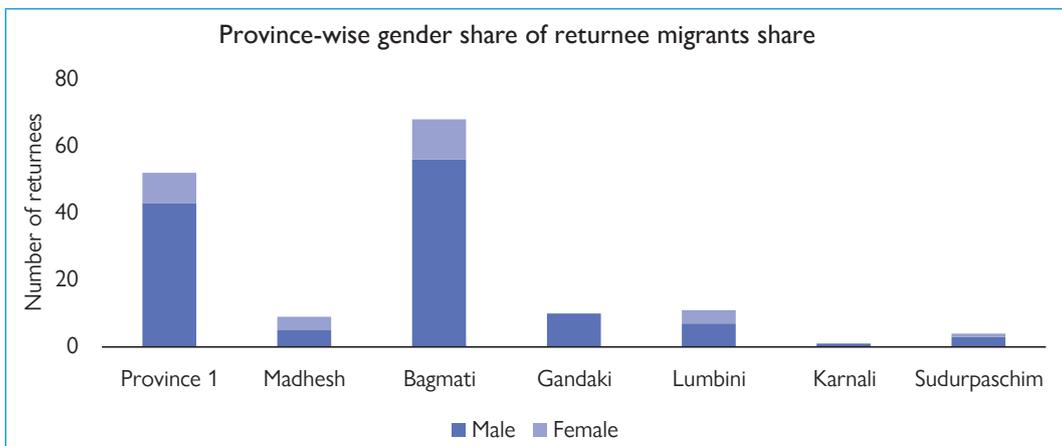
25. Source – EY-CESLAM primary research.

Figure 24- Provincial share of destination countries of Returnee migrants²⁶



A province-wise destination countries assessment was done as shown below. It shows that ~77 per cent share of returnee migrants is from top two province i.e., Bagmati and Province 1.

Figure 25- Provincial share of Returnee migrants²⁷

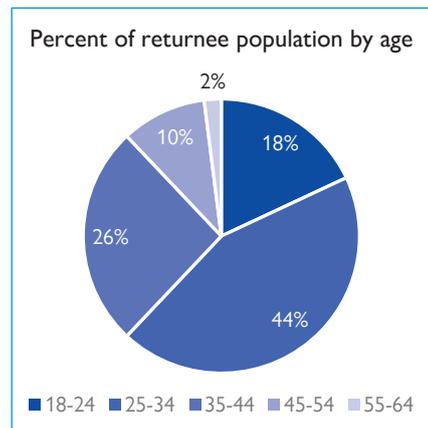


It can be seen from above graph that Karnali has the least share.

2.4.3 Age

The average age of male returnees is 33 years whereas it is ~30 years for females. The largest proportion is of age bracket of 25-34 years followed by 35-44 years.²⁸

Figure 26- Returnee population share by age bracket



26. Source – EY-CESLAM primary research.

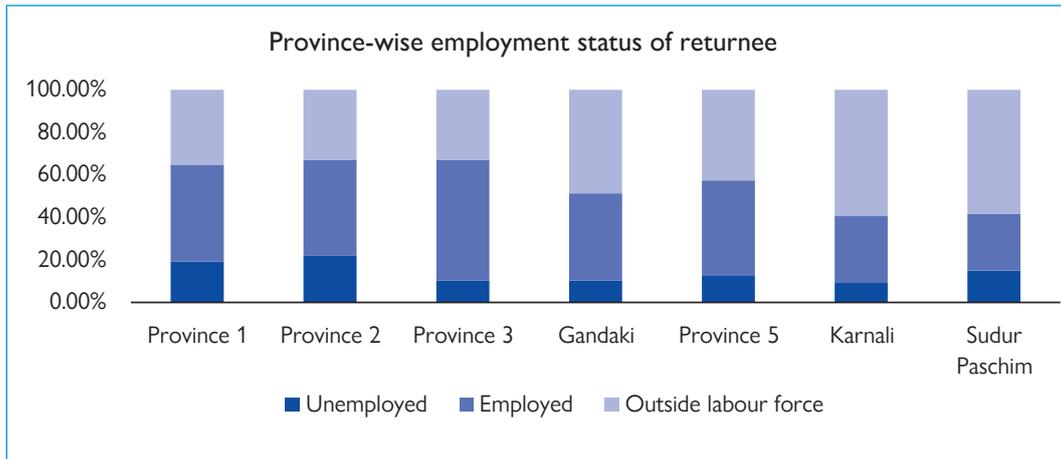
27. Source – EY-CESLAM primary research.

28. Nepal Labour Migration Report 2020.

2.4.4 Employment status

The overall employed share is 44.2 per cent followed by 41.5 per cent who are outside labour force whereas 14.3 per cent are unemployed. Unemployed refers to such individuals who are completely without work, currently available for work and are taking actions to find work.

Figure 27- Province-wise employment status of returnee migrants²⁹

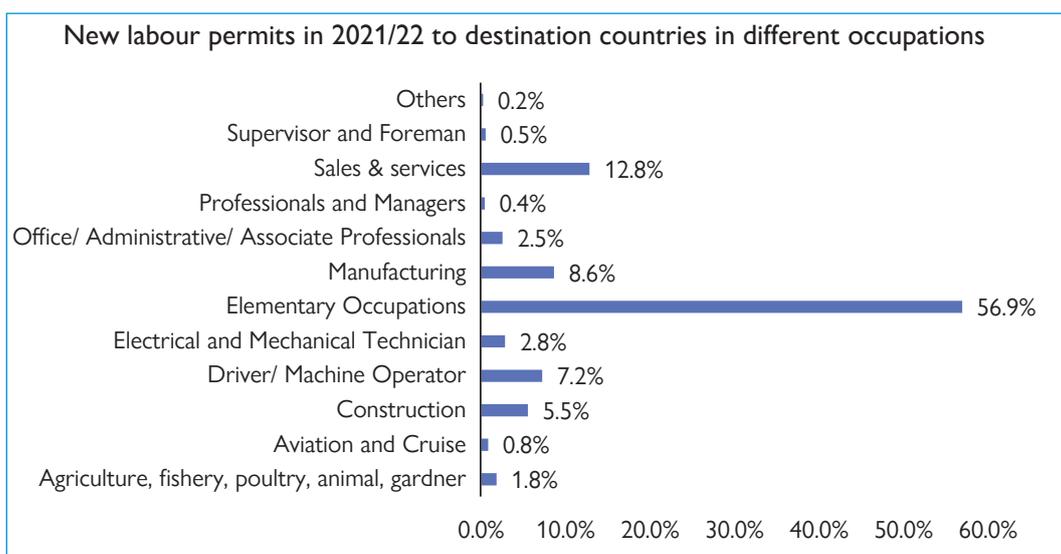


The situation is grave for female as ~75 per cent of female returnees fall in the category of outside labour force.³⁰

2.4.5 Occupation and skills

The figure below shows that new labour permits in FY 2021/22 was highest for Elementary Occupations followed by Sales and Services, Manufacturing, Driver/ Machine Operator and Construction.³¹

Figure 28- New labour permits in 2021/22 to destination countries in different occupations



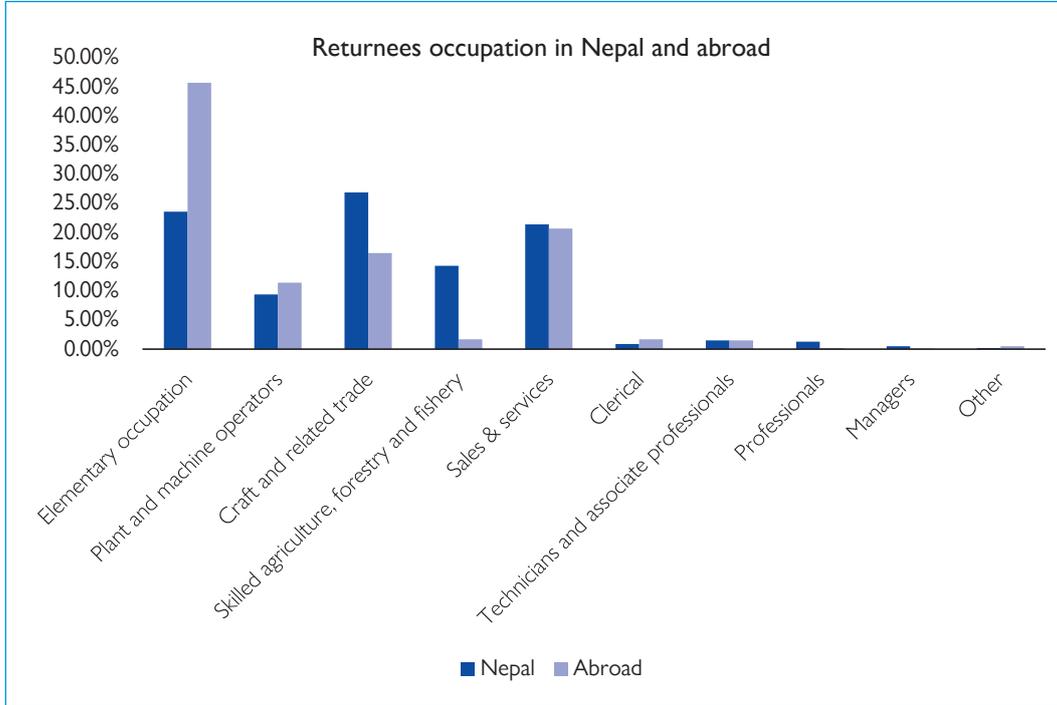
29. NLFS 2017/18.

30. NLFS 2017/18.

31. MoLESS, Nepal Labour Migration Report 2022 (Kathmandu: MoLESS, forthcoming)

In terms of occupation of returnee migrants, it is seen that the majority (45.6 per cent) of the returnees are employed in elementary occupations. This trend is consistent across all destination countries. It is followed by sector of sales and services & craft and related activity.

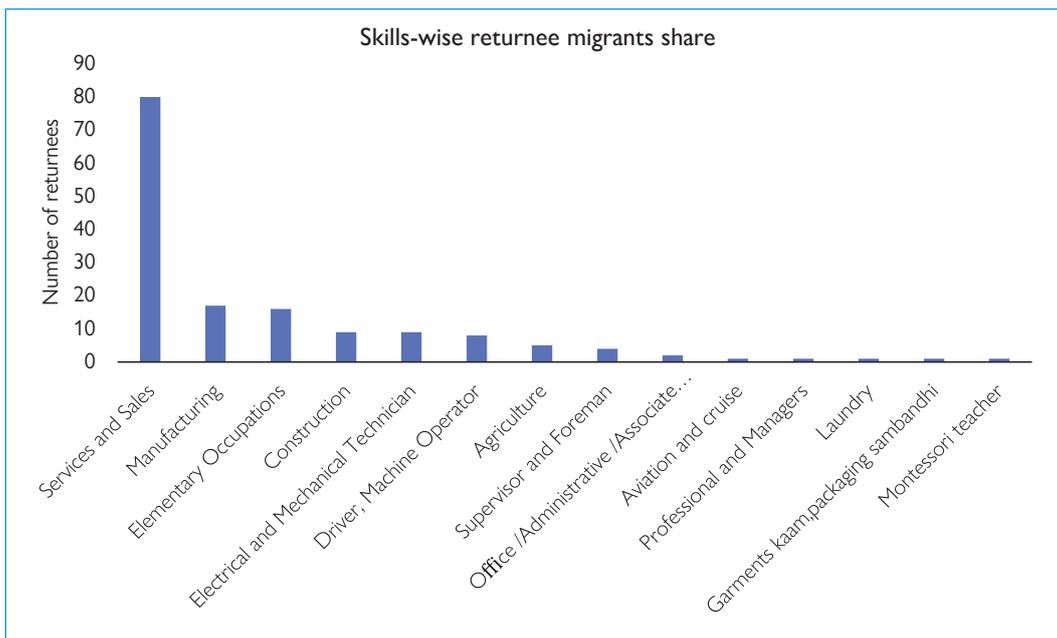
Figure 29- Occupation trend of returnees³²



Also, 15.1 per cent of returnees are employed in the same occupation in Nepal as abroad. It shows that skills acquired in abroad by returnees are not being utilized in domestic market.

Through primary interaction, it was observed that in terms of skills learnt in destination countries by returnees, sales and service has the highest share followed by manufacturing and elementary occupations.

Figure 30- Skills of returnees³³

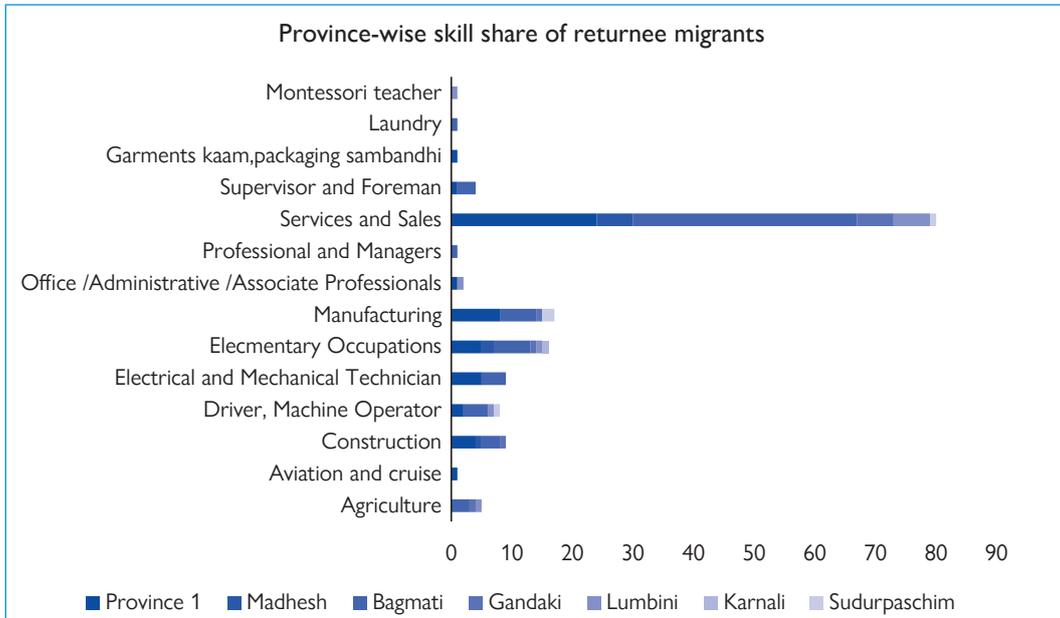


32. Nepal Labour Migration Report 2020.

33. Source – EY-CESLAM primary research.

The primary data has further segregated according to provinces. It also suggests that Sales and services is the leading sector followed by manufacturing and elementary occupations. A significant share is from construction, driver, machine operator and electrical technician. The two top provinces having maximum share of returnee migrants are – Bagmati and Province 1. It is shown below.

Figure 31- Province wise skill share of returnees ³⁴

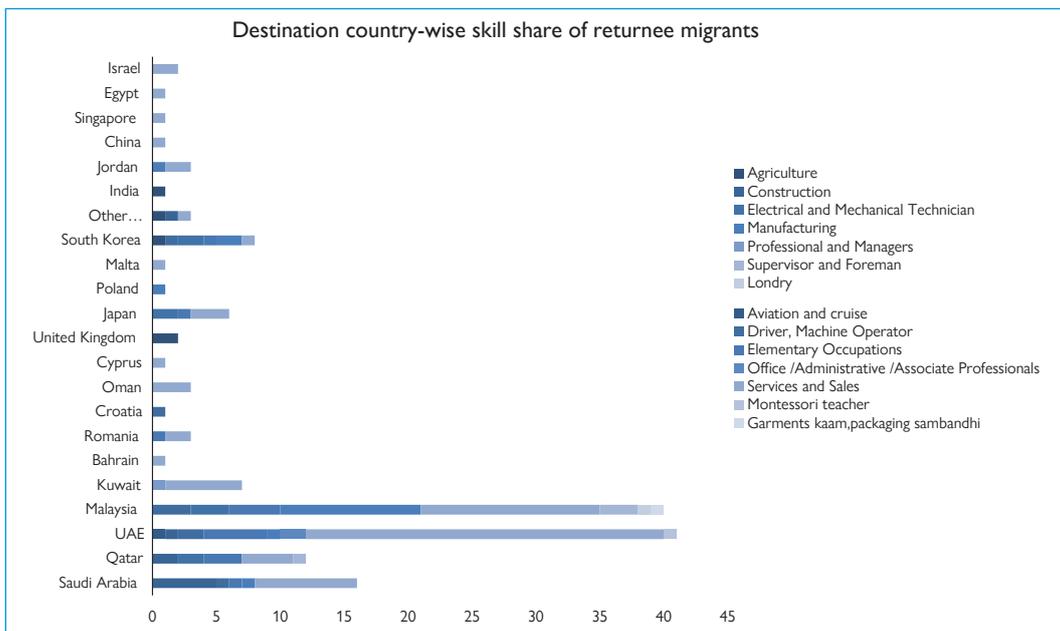


Interms of skill distribution by destination countries, it was found in the primary interaction that –

- ~52 per cent of returnee migrants have skill of service and sale industry.
- ~73 per cent share is of top three skill i.e., service and sale, manufacturing, and elementary occupations.

It is shown below.

Figure 32- Destination country wise skill shares of returnees³⁵



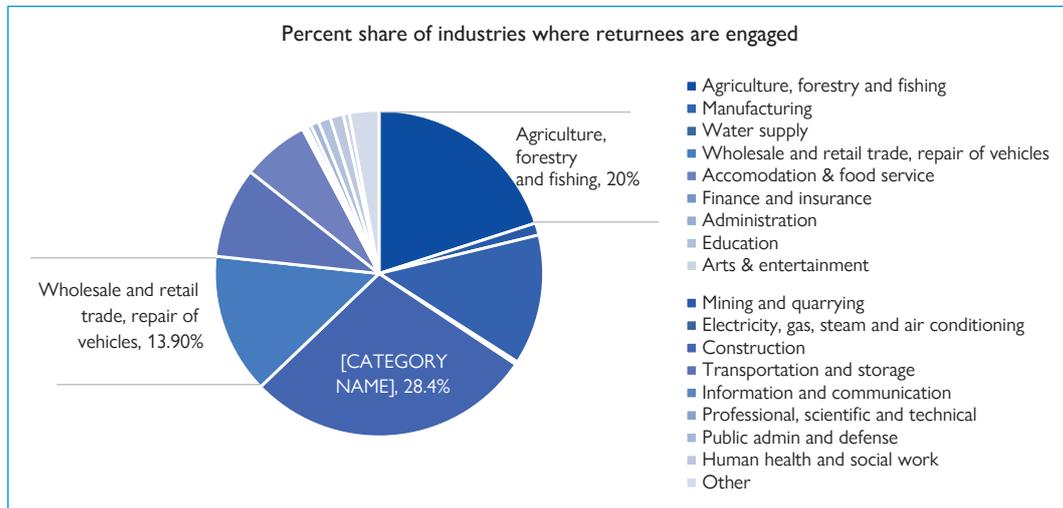
34. Source – EY-CESLAM primary research.

35. Source – EY-CESLAM primary research.

2.4.6 Industries

The three major sectors employing returnees are – (i) construction (28.4 per cent), (ii) agricultural, forestry & fishing (20 per cent) and (iii) wholesale and retail trade & repair of vehicles (14 per cent).

Figure 33- Share of industries in which returnees are engaged³⁶



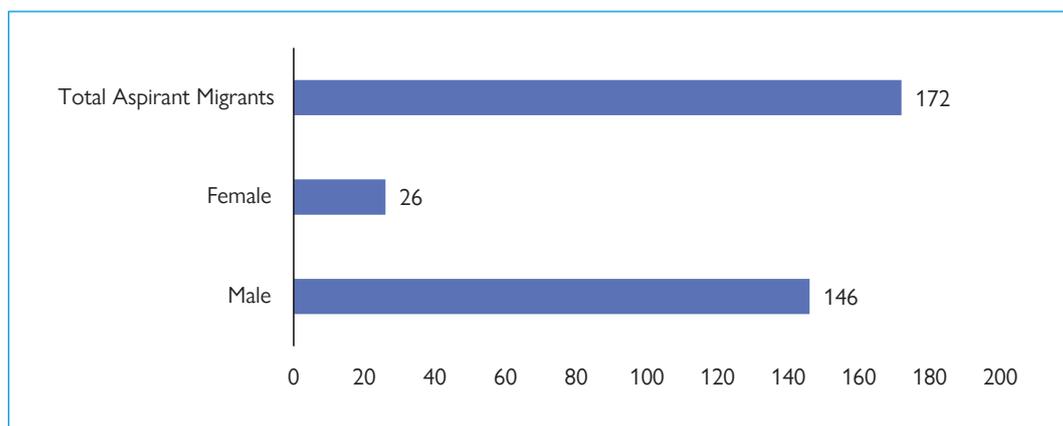
2.5 Nepal aspirant migrants' demographic scenario

We also conducted primary interaction with 172 aspirant migrants also.

2.5.1 Gender aspect

Male outnumbered female by six times.

Figure 34- Gender aspect of aspirant migrants³⁷



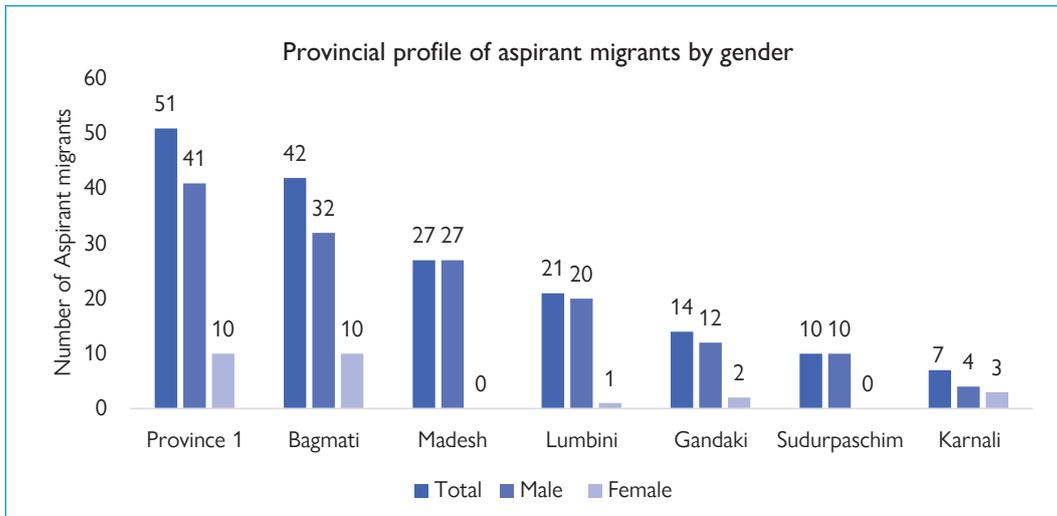
2.5.2 Geographical aspect

The primary interaction shows that maximum aspirants are from Province 1 and Bagmati. Karnali holds the least share.

36. Nepal Labour Migration Report 2020.

37. Source – EY-CESLAM primary research.

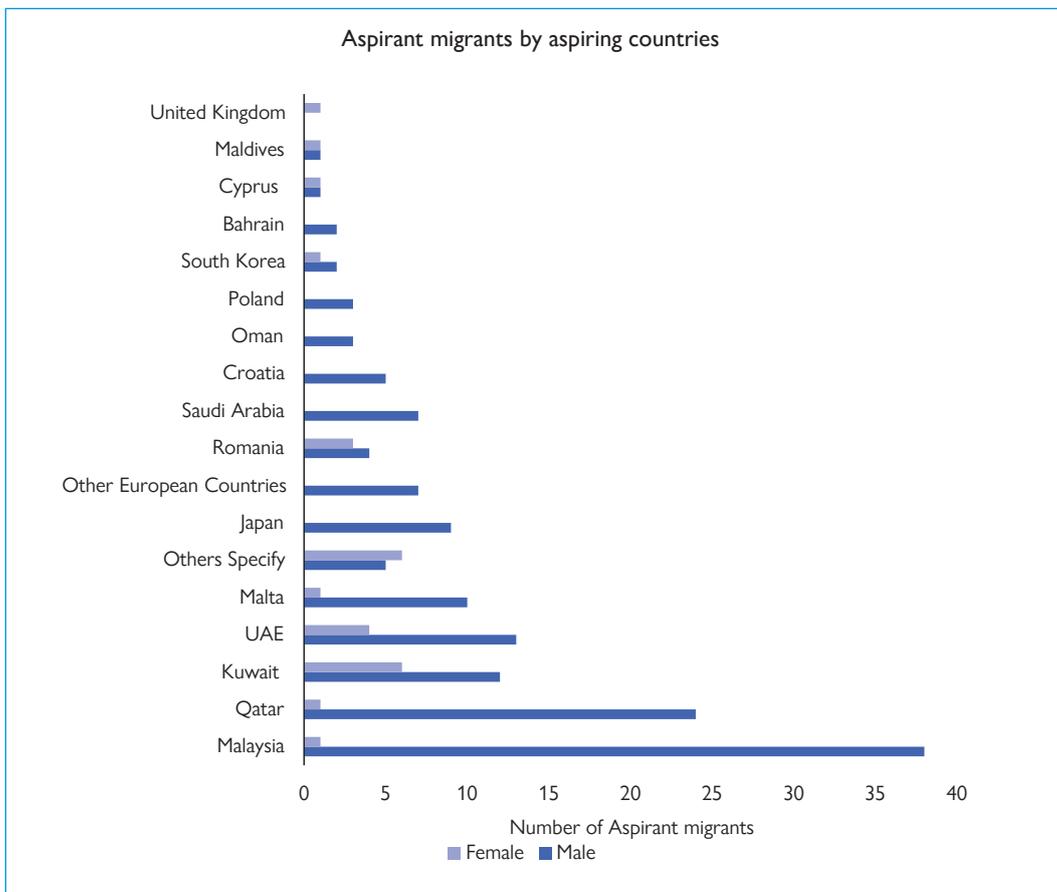
Figure 35- Province wise and gender share of aspirant migrants³⁸



2.5.3 Destination country aspect

From the survey conducted with migrants, it was observed that top countries for aspirants are Malaysia, Qatar, Kuwait, and UAE. Also, female share is missing from a lot of emerging destination countries such as Poland, Croatia, and Japan.

Figure 36- Aspiring country wise share of aspirant migrants³⁹



38. Source – EY-CESLAM primary research.

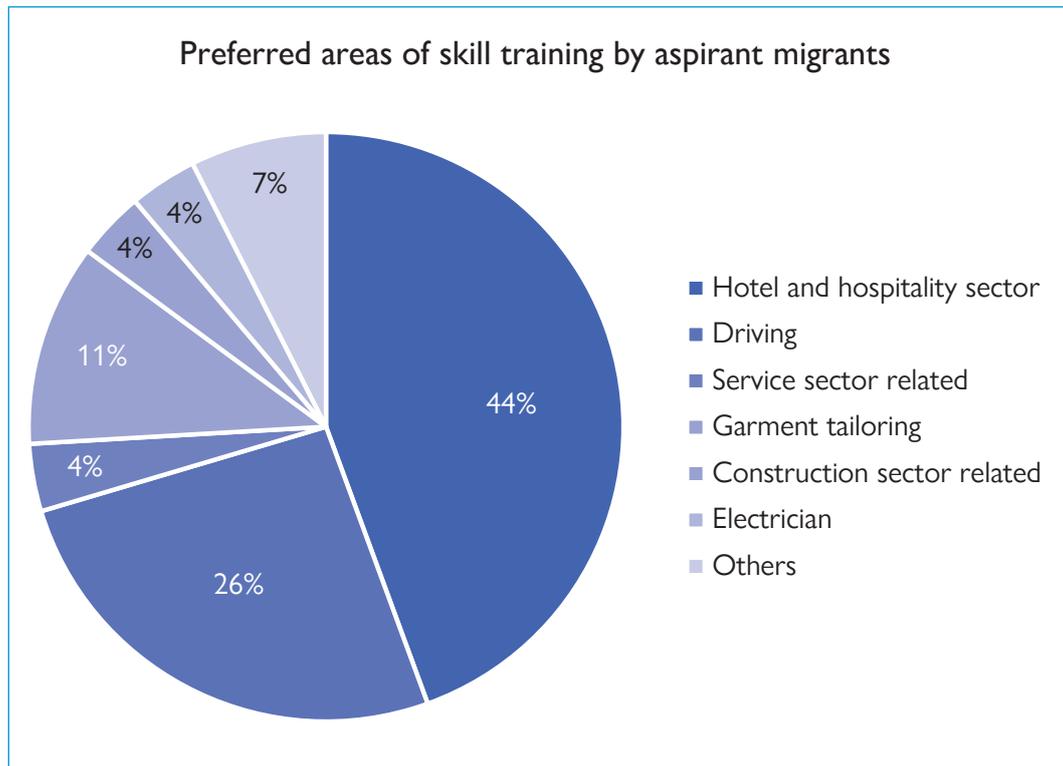
39. Source – EY-CESLAM primary research.

2.5.4 Skill aspect

In the primary interaction survey done with aspirants on the preferred area of skill training, it was found that –

- **Hotel and Hospitality** is the leading sector. This sector is also leading in participation from both the genders.
- There is a disparity in terms of gender preference of skills. Sectors like technician, construction, driver are dominated by male whereas garments and Montessori teacher skills has female domination.

Figure 37- Skill training area of aspirant migrants⁴⁰



2.6 COVID-19 impact

COVID-19 pandemic had a huge economic ramification at micro and macro level. As per ILO report in Apr 2020, the COVID-19 lockdown has **affected 2.7 billion workers** i.e., 81 per cent of the global workforce.⁴¹ ILO also expected that unemployed statistics will reach to the tune of 25 million by end of 2020.

A majority of Nepali migrants are employed in oil-exporting countries such as UAE. But this lockdown has led to a slump in the demand and price of oil. It had a long-term impact.

A study by CESLAM suggests that Nepal being a country dependent on foreign employment and depending heavily on remittances from foreign workers, the COVID-19 pandemic would have long-term impacts.⁴² As a result of COVID-19, many migrants were forced to go on unpaid leave or return home even before completion of their contract period.

40. Source – EY-CESLAM primary research.

41. CESLAM research paper X titled "COVID-19 and Nepali Labour Migrants – Impact and responses".

42. CESLAM research paper X titled "COVID-19 and Nepali Labour Migrants – Impact and responses".



CHAPTER 3

DESTINATION COUNTRIES FOR NEPALESE MIGRANTS

The detailed description of funnel approach is as below.

3.2.1 Data collection and research

It involves mix of secondary and primary research.



- As a part of secondary research, a des review of various reports and studies published by IOM, GoN, MOLESS, MOEST, CTEVT, Economic Survey, UNDESA, World Bank, Nepal Labour Migration Report 2020, Bikas Udhyami, UNDP, NRNA, ILO, etc. were referred.



- For the primary research part, we have taken the input from interview conducted with migrants (aspirants and returnee). It is attached as annexure.

3.2.2 Identification of parameters for destination countries selection

Basis the previous step along with favoured countries by migrants (as per primary interaction survey), we have drilled down the list of parameters to focus while selecting destination countries.

Some of the parameters are –



- Through secondary research, the parameter finalized are number of advertisements (advertisement analysis), labour permits/work permits, migration statistics, international migrant stock, country-wise number of Recruitment Agencies, etc.



- Primary interaction input was taken through the migrants' response on question like "which country is your preferred destination country?"

3.2.3 Drilling to top destination countries

Basis the parameters selected in the previous step out of secondary research, the top 30-40 countries were highlighted. The complete list is attached as **Annexure 9.5**.

Along with these countries, a preference is given to emerging countries as suggested from migrants' primary response. This is in line with the input received from Nepal concerned stakeholders such as CTEVT, MOEST and MOLESS.

3.2.4 Final selection of destination countries

Considering a mix of secondary and primary research as per previous step, final countries were selected. This list was then finalized in consultation with IOM team along with other relevant stakeholders from CTEVT, MOEST and MOLESS.

The final list of selected countries is –

1. United Kingdom (UK)
2. Cyprus
3. Australia
4. Jordan
5. Poland
6. Romania
7. Croatia
8. Malta
9. India

10. Republic of Korea
11. Japan
12. Portugal
13. Malaysia

In addition, a brief on demanding sector in Nepal's context is also highlighted for Gulf Cooperation Council (GCC) Countries in chapter 4.

Note - Some countries have not been detailed due to data limitation.

3.3 Skill demand scenario in finalized destination countries

This section deals with various job opportunities available in the selected destination countries in the next chapter 4.



CHAPTER 4

CONVENTIONAL & EMERGING COUNTRIES

4 Context

Apart from conventional destination countries for migrant workers of Nepal like Gulf Cooperation Council (GCC) countries and Malaysia, some European and other countries are also emerging and preferred by migrant workers of Nepal. In this chapter, we have highlighted conventional and emerging destination countries relevant to Nepal context and the workforce demand areas in these countries.

4.1 Conventional countries

The following table highlights job scenario in Gulf Cooperation Council (GCC) Countries or conventional countries.

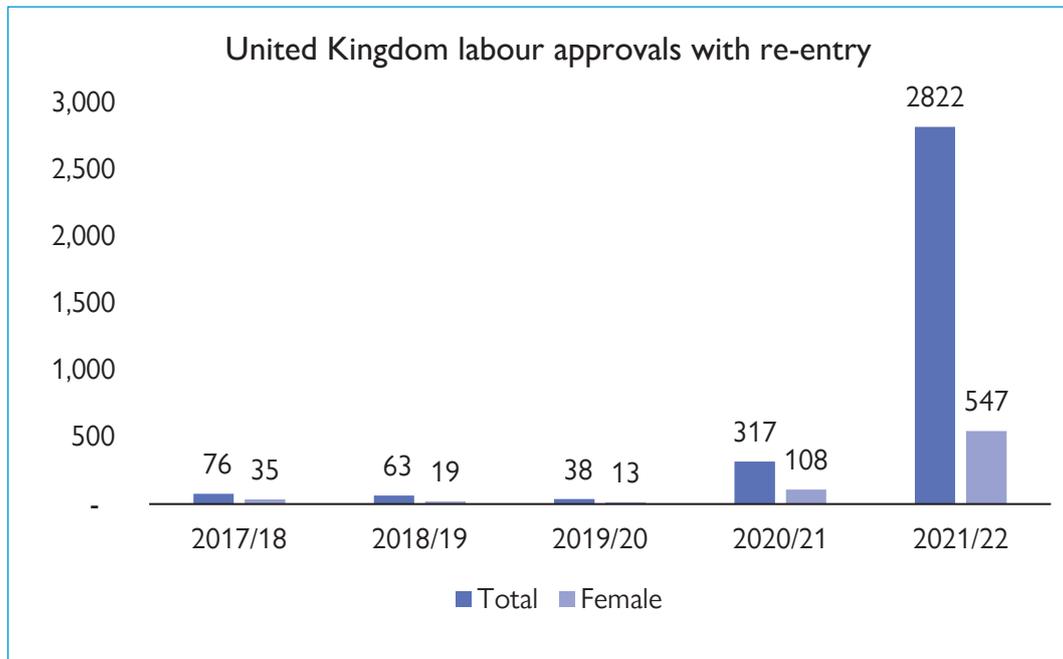
4.2 United Kingdom (UK)

United Kingdom (UK) has recently gained preference among migrant workers of Nepal looking for abroad jobs.

4.2.1 Labour migration outflow trend

As per the Department of Foreign Employment (DOFE) Nepal data, labour migration outflow to United Kingdom is gaining pace and high number of labour approvals can be observed in 2021/22 as highlighted below.

Figure 39- Labour approvals with re-entry to United Kingdom as per DOFE Nepal data⁴⁴



44. Source: Department of Foreign Employment (DOFE), Nepal.

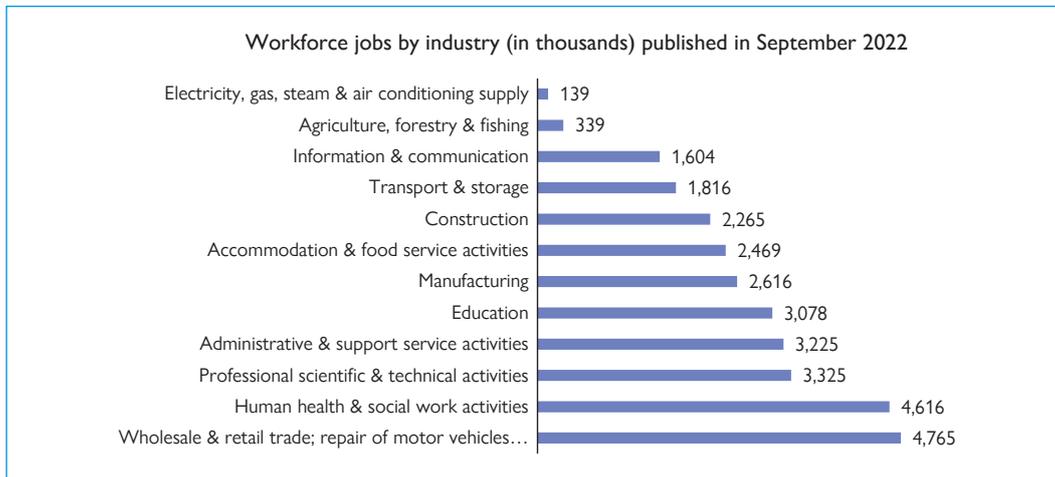
Table 2- Demand sectors summary for GCC countries (Conventional)

S. No.	Demand sector	Subcategory	Relevance to Nepal context (Existing training programmes)	High Occupational demand areas	Skill Mismatch/Gap
1	Trade; repair of motor vehicles	<ul style="list-style-type: none"> ■ Storekeeper ■ Vehicle Mechanic 	<ul style="list-style-type: none"> ■ Short term courses in professional motorcycle mechanic, professional light vehicle mechanic, junior auto mechanic, Professional Vehicle Body Repair Technician 	<ul style="list-style-type: none"> ■ Craft and related trade workers ■ Plant and machine operators and assemblers 	We could see relevance with ongoing skill training programmes as there are skill training programmes related to Trade; repair of motor vehicles sector in Nepal
2	Manufacturing	<ul style="list-style-type: none"> ■ Loading and Unloading ■ Mobile and Stationery Machines ■ Forklift Operator ■ Related Elementary Jobs ■ Industrial Electrician ■ Lathe Machine Operator ■ Fabricators, Welders, Painters, Helpers 	<ul style="list-style-type: none"> ■ Diploma and Pre Diploma in Mechanical Engineering ■ Diploma in Mechatronics Engineering ■ Diploma and Pre Diploma in Automobile Engineering ■ Short term courses in Repairing and Maintenance of Pump Set, Assistant Welder, Boiler Operator, Junior Industrial Machine Operator, Metal Worker, etc. 	<ul style="list-style-type: none"> ■ Service and sales workers ■ Elementary occupations 	We could see relevance with ongoing skill training programmes as there are skill training programmes related to Manufacturing sector in Nepal
3	Construction	<ul style="list-style-type: none"> ■ Building Construction ■ Heavy and Civil Engineering Construction ■ Building Installation Services ■ Related Elementary Jobs ■ Foreman/ Rigger ■ JCB Operators ■ Building Support – Electrician, Plumber, Carpenter, etc. 	<ul style="list-style-type: none"> ■ Diploma in Civil Engineering ■ TSLC (Pre Diploma) in Civil Engineering ■ Pre-diploma (Apprenticeship) in Civil_ Building Construction ■ Multiple short term courses in Civil/ Construction in Construction Technician, Plumber, Mason, Carpenter, etc. 		We could see relevance with ongoing skill training programmes as there are skill training programmes related to Construction sector in Nepal
4	Accommodation and Hospitality	<ul style="list-style-type: none"> ■ Accommodation services ■ Housekeeping ■ Waiter/ Waitresses ■ Cook ■ Receptionist ■ Cashier ■ Guard ■ Sales Assistant ■ Cafes, Restaurants and Takeaway Food Services ■ Food and Beverage Services 	<ul style="list-style-type: none"> ■ Diploma in Hotel Management ■ TSLC (Pre-Diploma) in Hotel Management ■ TSLC (Pre-Diploma Apprenticeship) in Hotel Management ■ Short-term courses in Hotel Assistant, Lodge Assistant, General Cook, Fast Food Cook, Barista, Continental Cuisine Cook, Housekeeping Cleaner, Waiter/ Waitress, etc. 		We could see relevance with ongoing skill training programmes as there are skill training programmes related to Accommodation and Hospitality sector in Nepal

4.2.2 Employment trend in United Kingdom (UK)

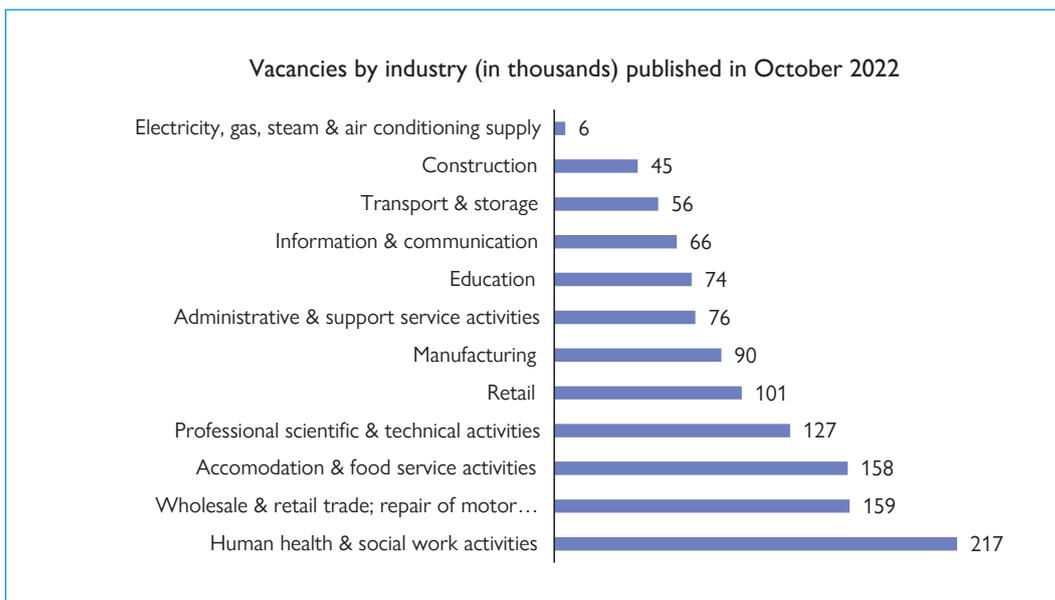
The wholesale & retail trade; repair of motor vehicles and motorcycles is the highest employing sector in the UK as can be observed from the below data followed by human health and social work activities. Manufacturing, accommodation & food services activities and construction sectors also employ significant number of people in the UK.⁴⁵

Figure 40- Workforce jobs by industry (in thousands) published in September 2022⁴⁶



As per the data shown below, highest job vacancies are found in human health and social work activities followed by wholesale & retail trade; repair of motor vehicles and motorcycles and accommodation & food services activities. Manufacturing sector has also shown significant number of vacancies in the UK.

Figure 41- Vacancies by industry (in thousands) published in October 2022⁴⁷



45. A01: Summary of labour market statistics – Office for National Statistics (ons.gov.uk).

46. Source: Office of National Statistics (ONS), Government of UK.

47. Source: Office of National Statistics (ONS), Government of UK.

Between September 2016 and September 2021, many lower-paid and lower-skilled occupations saw decline in employment mainly elementary occupations such as “elementary cleaning occupations” and “elementary sales occupations”, with “elementary cleaning occupations” saw the largest absolute fall of 2,65,000 during this time. Some of the occupations with employment fall were elementary agricultural occupations, agricultural and related trades, mobile machine drivers and operatives, construction operatives, metal forming, welding and related trades, plant and machine operatives, other drivers and transport operatives, sales assistants and retail cashier and leisure and travel services.

In comparison, many higher-paid and higher-skilled occupations saw an increase in employment. “IT and Telecommunications professionals” saw the largest absolute increase of 4,07,000. Positive employment levels change were observed in chief executives and senior officials, financial institution managers and directors, IT and Telecommunications professionals, health professionals, therapy professionals, elementary process plant occupations and welfare and housing associate professionals.^{48 49}

4.2.3 Emerging and demanding job sectors and occupations in United Kingdom

UK Commission for Employment and Skills (UKCES) report Working Futures provides labour market projections for the period 2014 to 2024.⁵⁰

As per Working Futures (2014 – 2024) report by UKCES, below is the forecasted high demand employment trend. It can be analysed that higher skill category jobs would be in high demand as compared to lower skill category jobs like Elementary jobs. Emphasis on educational qualification is also observed in the UK and by 2024, around 54 per cent of people in employment are expected to be qualified at level 4 and above and average qualification level is expected to rise within all occupations.

Table 3- Emerging and demanding sectors summary

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/ Gap
1	Construction	<ul style="list-style-type: none"> ■ Construction of buildings ■ Civil engineering ■ Sp ecialised construction activities e.g., demolition, installation, building completion activities 	Rising population levels in the UK are expected to increase demand for construction of housing and infrastructure and leading to employment demand in the sector.	<ul style="list-style-type: none"> ■ Diploma in Civil Engineering ■ TSLC (Pre-Diploma) in Civil Engineering ■ Pre-diploma (Apprenticeship) in Civil_ Building Construction ■ Multiple short-term courses in Civil/ Construction in Construction Technician, Plumber, Mason, Carpenter, etc. 	<ul style="list-style-type: none"> ■ Managers, directors and senior officials – Corporate managers and directors, other managers and proprietors ■ Professional occupations - Science, research, engineering and technology professionals, health & therapy professionals, media and public service professionals 	As there are already existing multiple training programmes of different levels in Nepal related to construction sector, migrant workers of Nepal could avail the facility of training programmes and contribute to lower skill category jobs, but for medium and higher skill level jobs in this sector, Nepal may think to upgrade existing training programmes.

48. Changing trends and recent shortages in the labour market, UK - Office for National Statistics (ons.gov.uk).

49. Standard Occupational Classification (SOC) - Office for National Statistics (ons.gov.uk).

50. UK labour market projections: 2014 to 2024 - GOV.UK (www.gov.uk).

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/ Gap
2	Business & Other Services	<ul style="list-style-type: none"> ■ Information technology ■ Support service activities ■ Professional services 	Comparative advantage of the UK, strong investment into the sector, and technological progress are anticipated to be major factors.	<ul style="list-style-type: none"> ■ Diploma in Information Technology (Engineering) ■ TSLC (Pre-Diploma) in Information Technology (Engineering) 	<ul style="list-style-type: none"> ■ Associate professional and technical - Health and social care associate professionals, Business, finance and related associate professionals 	Relevance of accommodation and catering sector can be observed in context to Nepal because of existing training programmes.
3	Trade, Accommodation and Transport	<ul style="list-style-type: none"> ■ Transport and storage 	Employment growth is expected to be mainly driven by jobs growth in retail, accommodation and catering. Changing consumer behaviour, such as change to purchasing goods online, are expected to increase demand in postal and courier activities, and transportation and distributional services.	<ul style="list-style-type: none"> ■ Diploma in Hotel Management ■ TSLC (Pre-Diploma) in Hotel Management ■ TSLC (Pre-Diploma Apprenticeship) in Hotel Management ■ Multiple Short-term courses in Hotel Assistant, Lodge Assistant, General Cook, Fast Food Cook, Barista, Continental Cuisine Cook, Housekeeping Cleaner, etc. 	<ul style="list-style-type: none"> ■ Caring, leisure and other service - Caring personal service occupations ■ Skilled trade occupation - Skilled construction and building trades ■ Elementary occupations - Elementary 	Relevance of accommodation and catering sector can be observed in context to Nepal because of existing training programmes.
4	Public admin, health, education	<ul style="list-style-type: none"> ■ Health and social work 	Wider demographic trends, such as the ageing population, will be a major driver of increased demand in the long run in health sector	<ul style="list-style-type: none"> ■ Diploma in Health Science ■ Diploma in Medical Lab Technology ■ Diploma in Pharmacy ■ PCL (Diploma) in Midwifery ■ PCL (Diploma) Nursing ■ PCL (Diploma) General Medicine ■ Short term courses in Caregiver, Dental Chairside Assistant, Physical Rehabilitation Assistant, Assistant Massage Therapist, Community Health Worker, Community Based Rehabilitation Facilitator, etc. 		<ul style="list-style-type: none"> ■ Relevance of health and social work sector can be observed in context to Nepal because of existing training programmes.

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/ Gap
5	Agriculture	<ul style="list-style-type: none"> Horticulture and harvesting 	Seasonal workers pilot scheme in Horticulture in 2019, 2020 and 2021 for Non-EU countries' Nationals.	<ul style="list-style-type: none"> Diploma in Agriculture (Plant Science) Diploma in Food/ Dairy Technology TSLC (Pre-Diploma) in Agriculture (Plant Science) Short term courses in Community Agriculture Assistant, Vegetable Processor, Herbal Farm Worker, Organic Vegetable Producer, Domestic Canning of Vegetables, Fruit nursery Technician, etc. 		Relevance of Agriculture sector can be observed in context to Nepal because of existing training programmes.

4.2.4 Seasonal workers pilot scheme in Horticulture – 2019, 2020 and 2021

In March 2019, The UK government launched a Seasonal Workers Pilot (Pilot) scheme in March 2019, which allowed two licensed operators/ labour providers to provide jobs to up to 2,500 temporary migrant workers from non-EU countries to work in the edible horticulture sector for up to 6 months, in each of 2019 and 2020. The expansion was done to 10,000 migrant workers in 2020, and 30,000 in 2021. A survey conducted on Pilot 2019 found that operators showed strong demand for workers to work on UK farms in horticulture.⁵¹

Farmers are interested to employ local British people but there not enough people available in the UK because of hard work and people have different expectations. The farming industry all across Europe is finding challenges to find enough workers for picking horticulture products. About 99 per cent of the seasonal workers came from outside the UK during 2019-2021. There is huge decline in migrant workers from Ukraine because of Russia-Ukraine war and recruiters are now looking for workers from Kyrgyzstan and Kazakhstan, as well as Nepal, Indonesia, and Vietnam.⁵²

4.3 Cyprus

Cyprus is the emerged and preferred destination country by migrant workers of Nepal as per labour approval data from DOFE and one of the best destination countries in terms of significant female labour approvals. The Cypriot Ministry of Employment, Welfare and Social Affairs published decrees in May 2019 allowing third-country national students and asylum seekers to work legally in Cyprus. These individuals can work in the hotel and food industries as per the decrees. Students from outside the EU who were already in Cyprus by 10 May 2019 may work in the food industry and in restaurants/leisure centres, provided they have a valid residence permit of at least six months.⁵³

In addition, according to a recent law, which follows a directive of the European Union, students who are nationals of third countries may now work in Cyprus, in paid economic

51. Seasonal workers pilot review 2019 - GOV.UK (www.gov.uk).

52. UK: Nepali seasonal workers scammed by recruiters - InfoMigrants.

53. Students from third countries and asylum seekers can now work legally in Cyprus | European Website on Integration (europa.eu).

activity, under certain conditions and for certain kinds of work. Students at recognised universities or university programmes are allowed to work up to 20 hours per week, in specific occupations and specified sectors of economic activity and they must be full-time students and had entered and resided in Cyprus by the 31 May 2021. They must be treated equally with Cypriot workers and all minimum labour standards should be observed as per Department of Labour, Cyprus. The employment of the foreign students is allowed in the following sectors of economic activity and occupations:⁵⁴

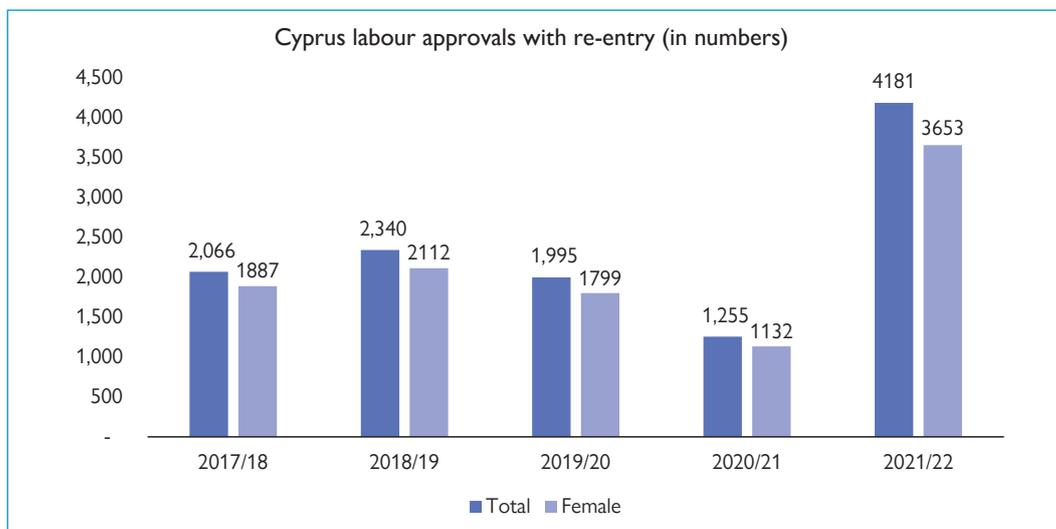
Table 4- Employment of the foreign students allowed in Cyprus in different sectors and occupations

S. No.	Industry Fields	Occupation
1	Trade-Repairs	<ul style="list-style-type: none"> ■ Wholesale Trade Freight Handle ■ Gas Station and Car Wash Labourers
2	Health and Social Care	<ul style="list-style-type: none"> ■ Care Givers in Homes for the Elderly
3	Household Activities	<ul style="list-style-type: none"> ■ Occasional Work of a Domestic Nature
4	Manufacturing	<ul style="list-style-type: none"> ■ Bakery Workers ■ Forage Production Labourers ■ Recycling Labourers ■ Night Shift Workers
5	Agriculture, Animal Husbandry and Fishery	<ul style="list-style-type: none"> ■ Agriculture, Animal Husbandry and Fishery Labourers
6	Food Industry	<ul style="list-style-type: none"> ■ Food Delivery / Kitchen Assistants / Cleaners
7	Hotels	<ul style="list-style-type: none"> ■ Kitchen Assistants / Cleaners
8	Restaurants and Recreational Centres	<ul style="list-style-type: none"> ■ Kitchen Assistants ■ Cleaners
9	Other Fields	<ul style="list-style-type: none"> ■ Buildings Cleaning Service Crew ■ Drainage and Waste Processing Labourers ■ Distributors of Advertising and Informative Materials

4.3.1 Labour migration outflow trend

Proportion of females in total labour approval is significant throughout the past years as highlighted below.

Figure 42- Labour approval with re-entry to Cyprus as per DOFE data⁵⁵



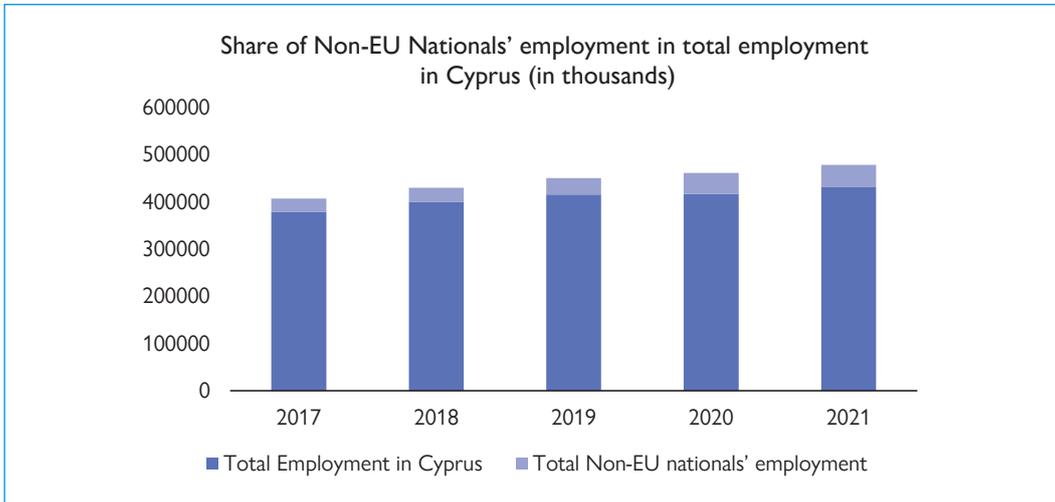
54. DEPARTMENT OF LABOUR - Employment of Students from Third Countries (mlsi.gov.cy).

55. Source: Department of Foreign Employment (DOFE), Nepal.

4.3.2 Employment trend in Cyprus

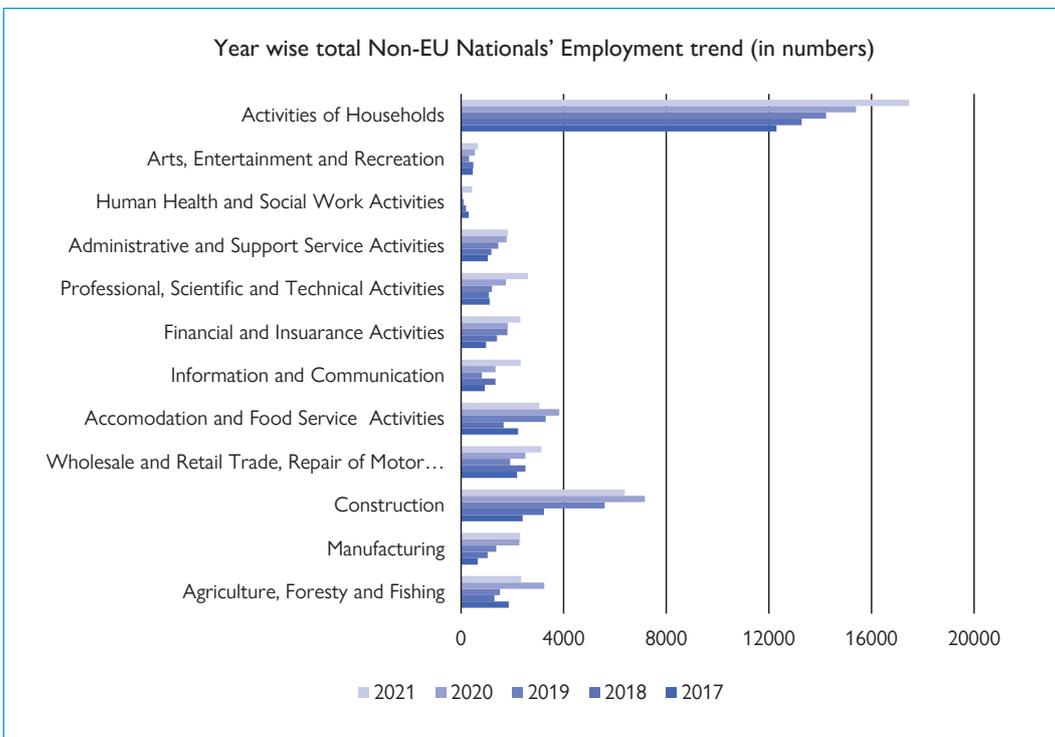
In the year 2021, the total number of Non-EU Nationals’ employment in Cyprus was 47,667 and it is showing an increasing trend from 2017 to 2021 as highlighted below.⁵⁶

Figure 43- Share of Non-EU Nationals’ employment in total employment in Cyprus (in numbers)



Households occupation’s contribution is highest in the total employment of Non-EU Nationals in Cyprus as highlighted below followed by Construction and Accommodation and Food Services Activities.⁵⁷

Figure 44- Year wise Total Non-EU Nationals’ Employment trend

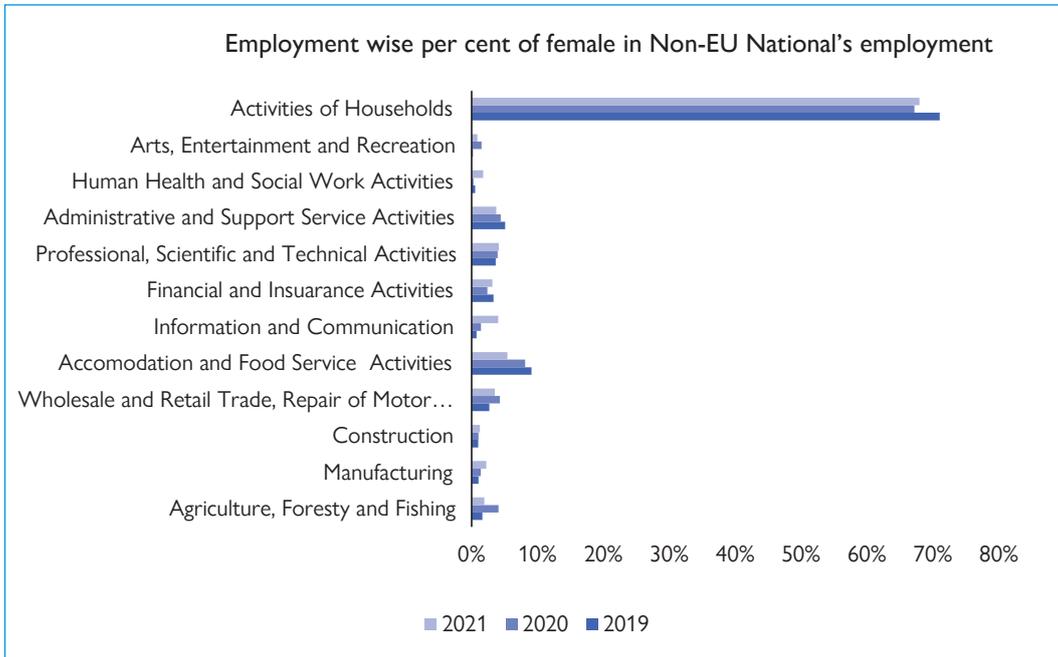


56. Statistical Service: PxWeb - Select table (cystat.gov.cy).

57. Statistical Service: PxWeb - Select table (cystat.gov.cy).

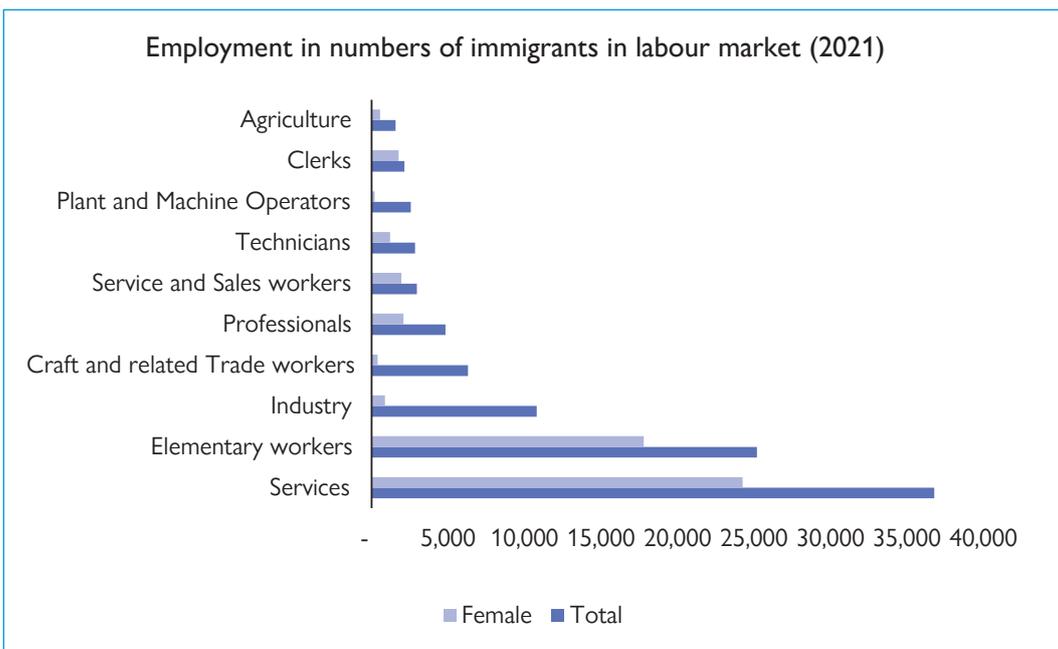
Activities of Households occupation's contribution is highest in the total employment of Non-EU Female Nationals in Cyprus as highlighted below.

Figure 45- Employment wise per cent of female in Non-EU Nationals' employment⁵⁸



Immigrants in Cyprus are mostly employed in Services followed by Elementary work and Industry as highlighted below. The data highlighted below refers to persons aged 15-74 years old that were born outside Cyprus.

Figure 46- Employment of Immigrants in Labour Market (2021)⁵⁹



58. Source: Statistical Service, Government of Cyprus.

59. Source: Statistical Service, Government of Cyprus.

4.3.3 Emerging and demanding job sectors and occupations in Cyprus

Number of job vacancies are found highest in wholesale and retail trade: repair of motor vehicles and motorcycles followed by accommodation and food services activities as highlighted below.

Figure 47- Year wise number of job vacancies by Economic Activity⁶⁰

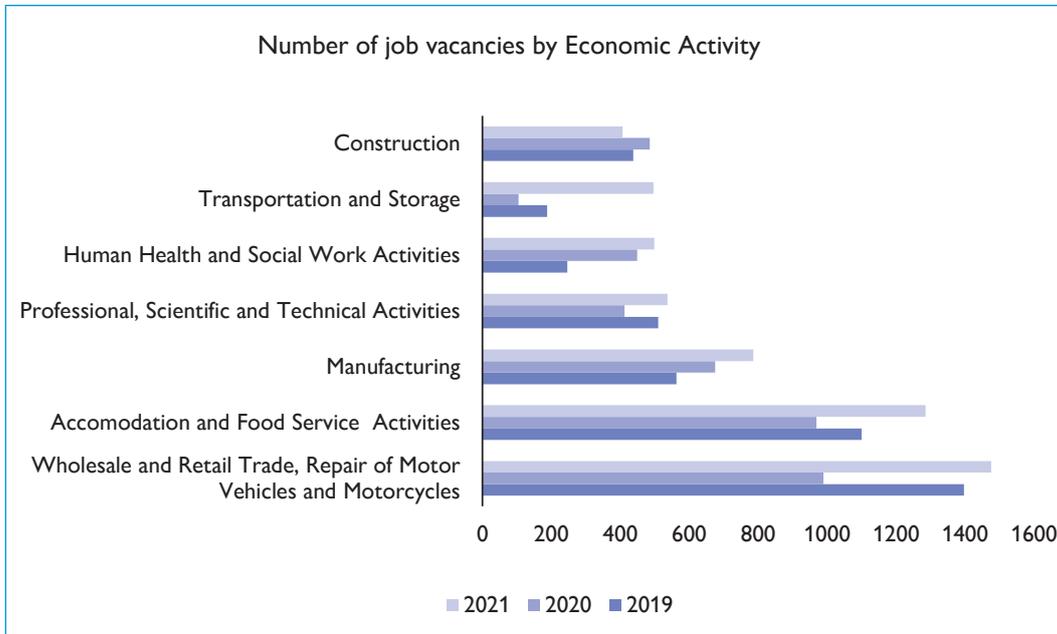


Table 5- Emerging and demanding sectors and occupations summary

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/ Gap
1	Tourism and Hospitality	Accommodation and Food Service Activities	One of the largest economic sectors in Cyprus, with a GDP contribution close to 15 per cent. Cyprus is a resilient tourist destination and has maintained the interest of leading investment groups and hotel chains to expand their footprint and invest in the island ⁶¹	<ul style="list-style-type: none"> Diploma in Hotel Management TSLC (Pre-Diploma) in Hotel Management TSLC (Pre-Diploma Apprenticeship) in Hotel Management Short-term courses in Hotel Assistant, Lodge Assistant, General Cook, Fast Food Cook, Barista, Continental Cuisine Cook, Housekeeping Cleaner 	<ul style="list-style-type: none"> Professionals Technicians Services and Sales Workers Elementary Workers Clerks 	Relevance of Tourism and Hospitality sector can be observed in context to Nepal because of existing training programmes.

60. Source: Statistical Service, Government of Cyprus.

61. Invest Cyprus | The National Investment Promotion Authority of Cyprus.

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/ Gap
2	Construction	<ul style="list-style-type: none"> ■ Residential and Non-Residential Building Construction ■ Hotels and Restaurants Construction ■ Sales Executives ■ Civil Engineers ■ Machine Operatives 	Tourism and Hospitality sector is expanding at a fast rate and major projects are underway such as marinas, golf resorts, hotels and luxury resorts and the new integrated Casino Resorts because of development in tourism related investment. Residences and Non-Residential Buildings are also showing positive growth.	<ul style="list-style-type: none"> ■ Diploma in Civil Engineering ■ TSLC (Pre-Diploma) in Civil Engineering ■ Pre-diploma (Apprenticeship) in Civil_Building Construction ■ Multiple short-term courses in Civil/ Construction in Construction Technician, Plumber, Mason, Carpenter, etc. 		Relevance of Construction sector can be observed in context to Nepal because of existing training programmes.
3	Renewable Energy	<ul style="list-style-type: none"> ■ Solar PV Installation ■ Solar PV Maintenance and Operation 	Cyprus plans to double the share of RE sources (23 per cent) in the period 2021-2030 while according to Cyprus Renewable Energy Roadmap (CERA), the island will be able to produce 25 to 40 per cent of its total electricity coming from solar power by 2030. ⁶²	Short term courses in Solar Photovoltaic Technician, Solar Electric Technician, Assistant Bio-Gas Technician, Assistant Low Voltage Technician		There are very few skills training programmes in Nepal related to Renewable Energy. Nepal Could think of adding more Renewable Energy related training programmes in training system especially related to Solar Energy as Renewable Energy is preference of many countries.
4	Information and Communication Technology (ICT)	<ul style="list-style-type: none"> ■ Software and system engineers ■ ICT and enterprise solution architects ■ Telecom and space engineers ■ Quality assurance analysts ■ Mobile application developers ■ Analysts for mobile apps and software ■ Cyber security specialists ■ AI, robotics and big data specialists 	Cyprus has been growing as a technology hub over the recent years, with an increasing number of ICT companies setting up their regional headquarters in the country or treating Cyprus as their hub for software development, systems integration, testing services, research and development and back offices.	<ul style="list-style-type: none"> ■ Diploma in Information Technology (Engineering) ■ TSLC (Pre-Diploma) in Information Technology (Engineering) 		Jobs and occupations in Information Technology require higher skill levels which currently lacks in Nepal's training system. But since Diploma and Pre-Diploma level courses already exist, Nepal could think to leverage it and may upgrade.

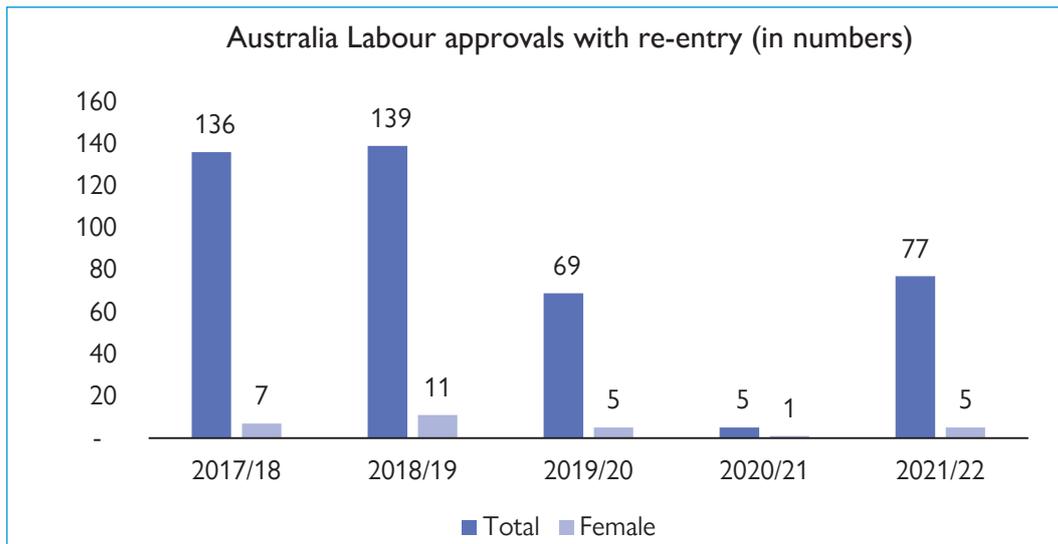
62. Invest Cyprus | The National Investment Promotion Authority of Cyprus.

4.4 Australia

4.4.1 Labour migration outflow to Australia

Australia is not very famous among migrant workers of Nepal as per the labour approval data shown below but has potential of emerging destination country because of huge workers requirement in different sectors that is discussed in the following sections.

Figure 48- Labour approvals with re-entry to Australia as per DOFE Nepal data⁶³



4.4.2 Employment trend in Australia

Australia is facing workforce shortage due to demographic change (ageing population), barriers to work (such as skills mismatch, non-vocational barriers, poor health, long-term unemployment), etc. which opens up opportunities for migrant workers to fill in the gap. Australia requires to fill more than one million new jobs by November 2026 and more than nine out of ten jobs will require further study after school.⁶⁴

Key focus areas of Government in Australia are to increase workforce participation and economic security of women and increase growth care and support workforce to meet the needs of the ageing population and people with disability. Over the next five years, one in four new jobs will be in Health Care and Social Assistance.⁶⁵

As per the National Skills Commission (NSC), over the 12 months to May 2022, the largest increase in employment is seen in Health Care and Social Assistance (up by 1,79,000 numbers). The largest decrease in employment is seen in Manufacturing (down by 79,500 numbers) and Agriculture, Forestry and Fishing (down by 25,000 numbers).⁶⁶

Occupational wise, the largest increase in employment is seen for Professionals (up by 1,62,400 numbers) and Clerical and Administrative Workers (up by 1,00,400 numbers). The largest decrease is seen for Labourers (down by 44,000 numbers).⁶⁷

63. Source: Department of Foreign Employment (DOFE), Nepal

64. Projecting employment to 2026 (nationalskillscommission.gov.au).

65. National Workforce Strategy 2022 2027 - Department of Employment and Workplace Relations, Australian Government (dewr.gov.au).

66. australian-labour-market-overview-september-2022-pdf.pdf (labourmarketinsights.gov.au).

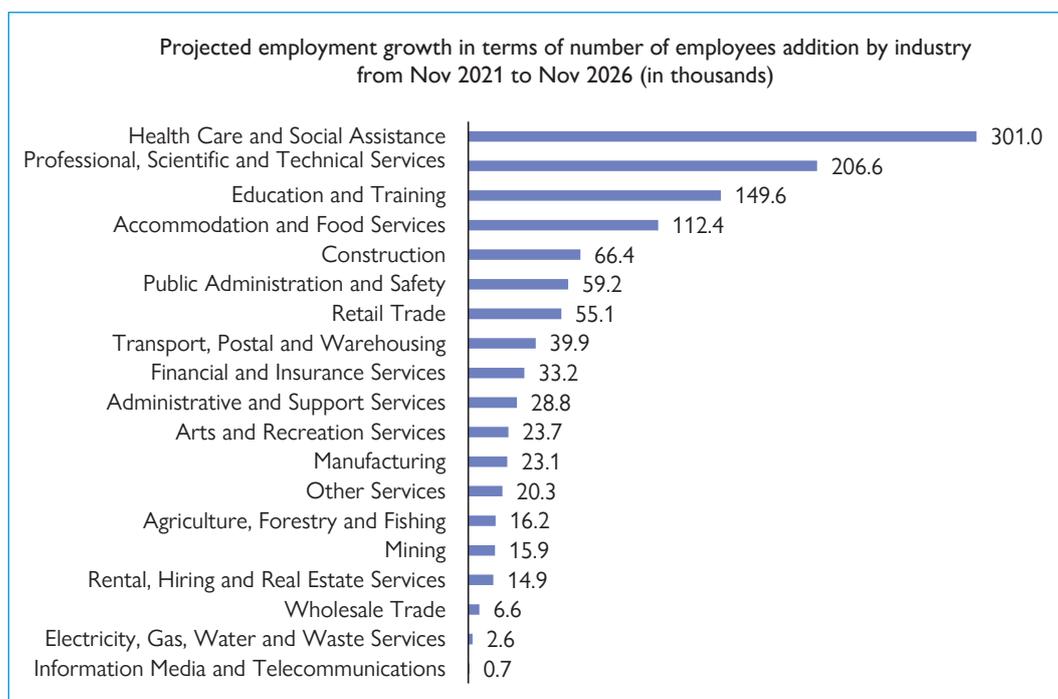
67. australian-labour-market-overview-september-2022-pdf.pdf (labourmarketinsights.gov.au)

153 occupations (19 per cent of assessed occupations) have been identified with skill shortages nationally which are most common in the Technicians and Trades Workers occupation group, largely seen in Electrician (General), Carpenter, Chef and Fitter (General). Machinery Operators and Drivers, Managers and Community and Personal Service Workers occupations are also in shortages. Skill Level 3 occupations have the largest proportion in shortage (38 per cent) which includes Child Care Worker and Motor Mechanic (General). Occupations such as ICT Project Manager and Aged or Disabled Carer are also in future demand.⁶⁸

4.4.3 Emerging and demanding job sectors and occupations in Australia

The National Skills Commission (NSC) employment projections (projected employment growth, November 2021 – November 2026) provide a guide to the direction of the jobs market over the next five years. Projected employment growth by industry in terms of number of employees addition required till 2026 is highlighted below.⁶⁹

Figure 49- Projected employment growth by industry from Nov 2021 to Nov 2026 (in thousands)



Four services industries are projected to provide almost two-thirds (65.4 per cent) of the total projected employment growth as mentioned below.⁷⁰

- Health care and social assistance
- Professional, scientific and technical services
- Education and training
- Accommodation and food services.

68. Skills Priority List | Labour Market Insights (Government of Australia)

69. National Workforce Strategy 2022-2027 - Department of Employment and Workplace Relations, Australian Government (dewr.gov.au).

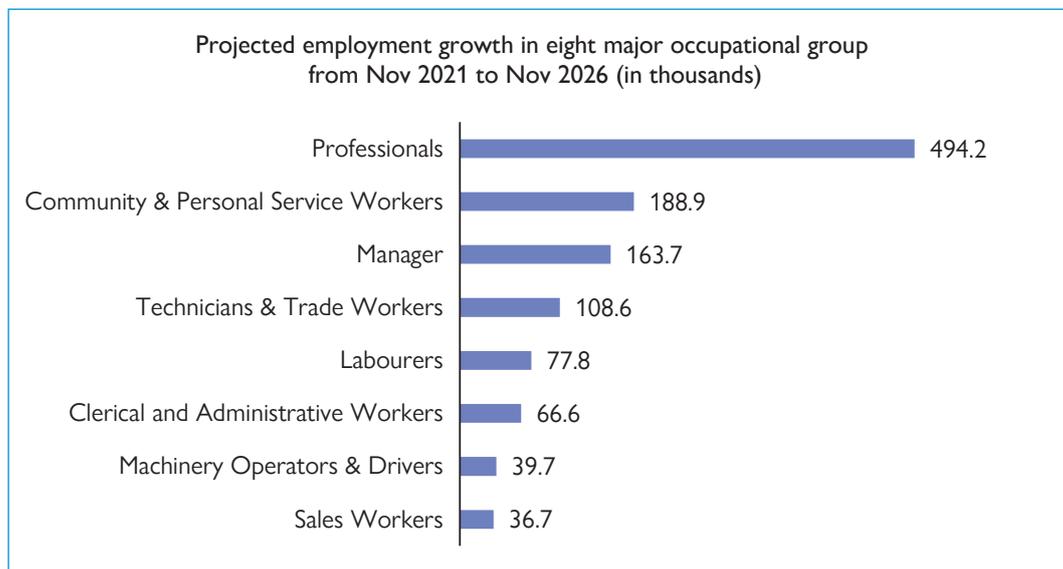
70. Employment Projections | National Skills Commission.

Employment is projected to grow in 291 out of 358 occupations over the five years to November 2026. Some of the jobs with the strongest employment increase are highlighted below.⁷¹

- Aged and disabled carers (up by 74,900 or 28.0 per cent)
- Registered nurses (up by 40,400 or 13.9 per cent)
- Software and application programmers (up by 42,200 or 27.0 per cent)
- Database and systems administrators, and ICT security specialists (up by 29,100 or 38.9 per cent)
- Management and organization analysts (up by 28,200 or 32.2 per cent).
- Welfare Support Workers (up by 19,100 or 25.2 per cent)

Projected employment growth in eight (8) major occupational groups, November 2021 – November 2026 is highlighted below.⁷²

Figure 50- Projected employment growth in eight major occupational group from Nov 2021 to Nov 2026 (in thousands)⁷³



Jobs in Science, Technology, Engineering and Maths (STEM) are predicted to grow by 14.2 per cent, twice as fast as non-STEM jobs (7.4 per cent). More than nine out of ten jobs will require further study after school.⁷⁴

71. Projecting employment to 2026 (nationalskillscommission.gov.au).

72. Employment Projections | National Skills Commission.

73. Source: National Skills Commission (NSC), Government of Australia.

74. Projecting employment to 2026 (nationalskillscommission.gov.au).

Table 6- Emerging and demanding job sectors and occupations summary

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/ Gap
1	Healthcare and Social Assistance	<ul style="list-style-type: none"> ■ Hospitals ■ Medical Services ■ Allied Health Services ■ Residential Care Services ■ Social Assistance Services ■ Child Care Services 	Growth care and support workforce is government focus to meet the needs of the ageing population and people with disability. The ratio of working age people to those over 65 is expected to fall from 4.0 to 2.7 over the next 40 years. And over the next five years, one in four new jobs will be in Health Care and Social Assistance. ⁷⁵	<ul style="list-style-type: none"> ■ Diploma in Health Science ■ Diploma in Medical Lab Technology ■ Diploma in Pharmacy ■ PCL (Diploma) in Midwifery ■ PCL (Diploma) Nursing ■ PCL (Diploma) General Medicine ■ Short term courses in Caregiver, Dental Chairside Assistant, Physical Rehabilitation Assistant, Assistant Massage Therapist, Community Health Worker, Community Based Rehabilitation Facilitator, Early Childhood Montessori Facilitator, Waiter/Waitress 	<ul style="list-style-type: none"> ■ Managers - Chief Executives, General Managers and Legislators, Human Resource Managers, Business ■ Professionals - Accountants, Auditors and Company Secretaries, Information and Organization Management and Organization Analysts, Architects, Designers, Planners and Surveyors, Graphic and Web Designers, Professionals, Administration Managers, Construction, Distribution and Production Managers, Farmers and Farm Managers, Education, Health and Welfare Services Managers, ICT Managers, Accommodation and Hospitality Managers, Cafe and Restaurant Managers and Illustrators, Civil Engineering Professionals, Health Therapy Professionals, Medical Practitioners, Midwifery and Nursing Professionals, Registered Nurses, Software and Applications Programmers, 	Relevance of Health and social Assistance sector can be observed in context to Nepal because of existing training programmes.

75. National Workforce Strategy 2022 2027 - Department of Employment and Workplace Relations, Australian Government (dewr.gov.au).

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/ Gap
2	Accommodation and Food Services	<ul style="list-style-type: none"> ■ Accommodation ■ Cafes, Restaurants and Takeaway Food Services ■ Food and Beverage Services 	Accommodation and Food Services is one of the four services industries which has projected highest employment growth from Nov 2021 to Nov 2026 as per NSC	<ul style="list-style-type: none"> ■ Diploma in Hotel Management ■ TSLC (Pre Diploma) in Hotel Management ■ TSLC (Pre Diploma Apprenticeship) in Hotel Management ■ Short-term courses in Hotel Assistant, Lodge Assistant, General Cook, Fast Food Cook, Barista, Continental Cuisine Cook, Housekeeping Cleaner, 	<p>Database and Systems Administrators, and ICT Security Specialists, ICT Network and Support Professionals, Social and Welfare Professionals</p> <ul style="list-style-type: none"> ■ Technicians and Trades Workers – Building and Engineering Technicians, ICT Support Technicians, Plumbers, Electricians, Food Trades Workers, Chefs, Horticultural Trades Workers, Gardeners, Hairdressers, Carpenter ■ Community and Personal Service Workers - Health and Welfare Support Workers, Personal Carers and Assistants, Education 	There are very few skills training programmes in Nepal related to Renewable Energy. Nepal Could think of adding more Renewable Energy related training programmes in training system especially related to Solar Energy as Renewable Energy is preference of many countries.
3	Construction	<ul style="list-style-type: none"> ■ Residential Building Construction ■ Heavy and Civil Engineering Construction ■ Building Installation Services 	Construction industry is growing in Australia and is projected as the fifth largest industry in terms of employment growth as per the NSC from Nov 2021 to Nov 2026.	<ul style="list-style-type: none"> ■ Diploma in Civil Engineering ■ TSLC (Pre Diploma) in Civil Engineering ■ Pre-diploma (Apprenticeship) in Civil_ Building Construction ■ Multiple short term courses in Civil/ Construction in Construction Technician, Plumber, Mason, Carpenter, etc. 	<p>Aides, Aged and Disabled Carers, Nursing Support and Personal Care Workers, Waiters, Bar Attendants and Baristas</p> <ul style="list-style-type: none"> ■ Clerical and Administrative Workers - Contract, Programme and Project Administrators, General Clerks, Miscellaneous Clerical and Administrative Workers 	Relevance of Construction sector can be observed in context to Nepal because of existing training programmes.
4	Sustainable and Renewable Energy	<ul style="list-style-type: none"> ■ Solar Installers ■ Energy Efficiency Engineers ■ Hazardous Materials Labourers ■ Wind Turbine Technicians 	Sustainable and Renewable Energy category is one of the seven identified and validated categories which has emerging job occupations. There are 25 emerging occupations identified in these seven categories in the Australian labour market as per NSC. ⁷⁶	<ul style="list-style-type: none"> ■ Short term courses in Solar Photovoltaic Technician, Solar Electric Technician, Assistant Bio-Gas Technician, Assistant Low Voltage Technician 	<ul style="list-style-type: none"> ■ Sales Workers - Real Estate Sales Agents, Sales Assistants (General), Checkout Operators and Office Cashiers ■ Machinery Operators and Drivers - Stationary Plant Operators, Drillers, Miners and Shot Firers, Delivery Drivers, Store persons 	There are very few skills training programmes in Nepal related to Renewable Energy. Nepal Could think of adding more Renewable Energy related training programmes in training system especially related to Solar Energy as Renewable Energy is preference of many countries.

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/ Gap
5	Retail Trade	<ul style="list-style-type: none"> Supermarket and Grocery Stores Hardware, Building and Garden Supplies Retailing Clothing, Footwear and Personal Accessory Retailing Pharmaceutical and Other Store-Based Retailing 	Retail Trade has employment growth projection of 55,100 employees from Nov 2021 to Nov 2026 as per NSC.	<ul style="list-style-type: none"> Short term courses in Nursery and Garden Assistant, Garden Designer, Salesperson 	<ul style="list-style-type: none"> Labourers - Cleaners and Laundry Workers, Commercial Cleaners, Construction Labourers, Building and Plumbing Labourers, Food Process Workers, Packers, Farm, Forestry and Garden Workers, Fast Food Cooks, Kitchenhands Machinery Operators and Drivers - 	There are relevant programmes currently running in Nepal related to Hardware, Building and Garden Supplies Retailing.
6	Administrative and Support Services	<ul style="list-style-type: none"> Building Cleaning, Pest Control and Gardening Services Travel Agency and Tour Arrangement Services 	Building Cleaning, Pest Control and Gardening Services and Travel Agency and Tour Arrangement Services has high employment growth projection as per NSC	<ul style="list-style-type: none"> Short term courses in Nursery and Garden Assistant, Building Painter, Trekking Guide, Travel Agent 	<ul style="list-style-type: none"> Stationary Plant Operators, Drillers, Miners and Shot Firers, Delivery Drivers, Store persons Labourers - Cleaners and Laundry Workers, Commercial Cleaners, Construction Labourers, Building and Plumbing 	There are relevant programmes currently running in Nepal related to Building Cleaning
7	Other Services	<ul style="list-style-type: none"> Personal Care Services 	Personal Care Services has employment growth projection of 17,500 employees from Nov 2021 to Nov 2026 as per NSC.	<ul style="list-style-type: none"> PCL (Diploma) Nursing PCL (Diploma) General Medicine Short term courses in Caregiver, Physical Rehabilitation Assistant, Assistant Massage Therapist, Community Health Worker, Community Based Rehabilitation Facilitator 	<ul style="list-style-type: none"> Labourers, Food Process Workers, Packers, Farm, Forestry and Garden Workers, Fast Food Cooks, Kitchenhands Labourers, Food Process Workers, Packers, Farm, Forestry and Garden Workers, Fast Food Cooks, Kitchenhands 	There are relevant programmes currently running in Nepal related to Personal Care Services
8	Agriculture, Forestry and Fishing	<ul style="list-style-type: none"> Meat processing Sheep, Beef Cattle and Grain Farming Fruit and Tree Nut Growing Mushroom and Vegetable Growing 	The Government is developing an Australian Agriculture Visa to address workforce shortages, which will be available to skilled, semi-skilled and low skilled workers ⁷⁷	<ul style="list-style-type: none"> Diploma in Agriculture (Plant Science) Diploma in Food/ Dairy Technology TSLC (Pre-Diploma) in Agriculture (Plant Science) Short term courses in Community Agriculture Assistant, Vegetable Processor, Herbal Farm Worker, Mushroom Grower, Organic Vegetable Producer, Domestic Canning of Vegetables, Fruit nursery Technician, 		There are relevant programmes currently running in Nepal related to Fruit and Tree Nut Growing, Mushroom and Vegetable Growing

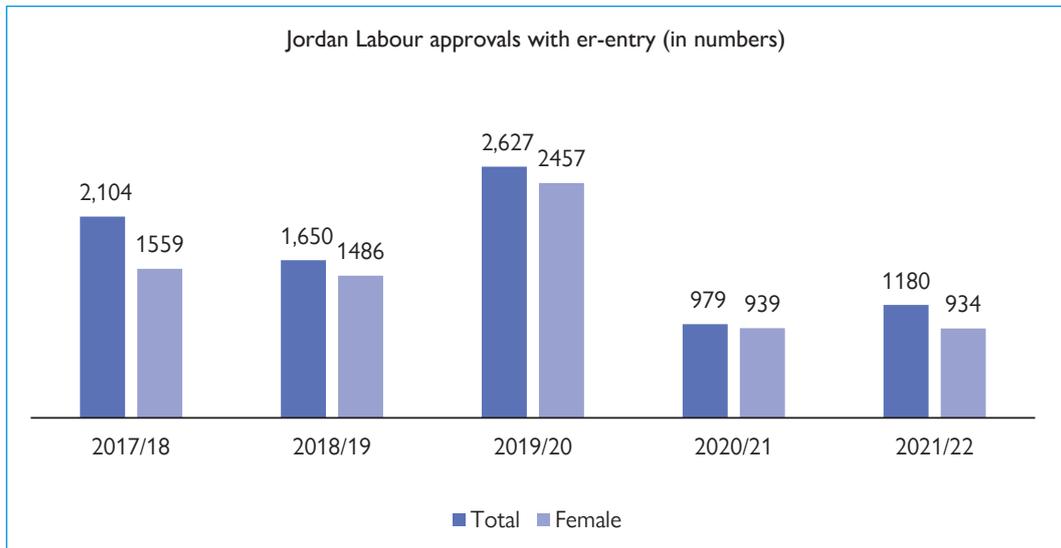
77. National Workforce Strategy 2022 2027 - Department of Employment and Workplace Relations, Australian Government (dewr.gov.au).

4.5 Jordan

4.5.1 Labour migration outflow to Jordan

Labour migration to Jordan shows significant numbers in past years with high proportion of female migrants as shown below.

Figure 51- Labour approvals with re-entry to Jordan as per DOFE data⁷⁸



4.5.2 Employment trend in Jordan

As per the Department of Statistics, Government of Jordan, unemployment rate during the Second Quarter of 2022 was 22.6 per cent with a decrease of 2.2 per cent point from the second quarter of the 2021.⁷⁹

However, Jordan is becoming a preferred emerging destination country as per Nepalese migration data to Jordan, especially females. Jordan has also developed a number of national strategies and policy frameworks including Jordan Vision 2025, the Jordan Economic Growth Plan 2018–2020, the National Employment Strategy (NES) and the National Strategy for Human Resource Development 2016–2025, all of which seek to promote inclusive growth, job creation and Decent Work.⁸⁰

Proportion of foreign employees in Jordan's total employment is around 4 per cent over the past years which is highlighted below.⁸¹

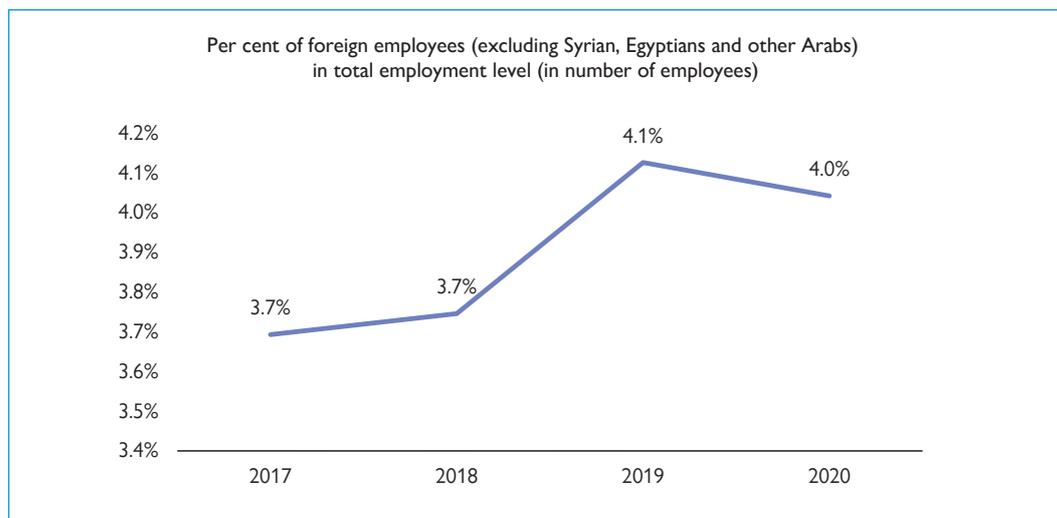
78. Source: Department of Foreign Employment (DOFE), Nepal.

79. 22.6 per cent Unemployment Rate during the Second Quarter of 2022 – Department of Statistics (dos.gov.jo).

80. ILO Jordan.indd. (Decent Work Country Programme - The Hashemite Kingdom of Jordan).

81. Tables of Employment in Establishment – Department of Statistics (dos.gov.jo).

Figure 52- Per cent of foreign employees (excluding Syrian, Egyptians and Other Arabs) in total employment level (in number of employees)⁸²



Share of foreigners (excluding Syrian, Egyptians and Other Arabs) in total employment level in different economic activities in Jordan (in number of employees) is highlighted below.⁸³

Table 7- Share of foreigners (excluding Syrian, Egyptians and Other Arabs) in total employment level in different economic activities in Jordan

Sector	2017		2018		2019		2020	
	Male	Female	Male	Female	Male	Female	Male	Female
Manufacturing	16,062	24,073	18,563	21,749	20,472	25,108	19,260	25,863
Construction	397	1	1,166	0	912	0	389	0
Wholesale and Retail Trade, Repair of Motor Vehicles and Motorcycles	876	20	358	95	294	86	444	54
Accommodation and Food Service Activities	243	356	980	382	781	450	685	413
Human Health and Social Work Activities	78	108	32	309	82	366	55	487

Source: Department of Statistics, Government of Jordan

Total number of paid employees in Jordan by major occupation level is shown below and it can be observed that plant and machine operators and assemblers and elementary occupations have significant contribution.⁸⁴

82. Source: Department of Statistics, Government of Jordan.

83. Tables of Employment in Establishment – Department of Statistics (dos.gov.jo).

84. Tables of Employment in Establishment – Department of Statistics (dos.gov.jo).

Table 8- Total number of paid employees in Jordan by major occupation level

Occupation	2017		2018		2019		2020	
	Total	Female	Total	Female	Total	Female	Total	Female
Legislators, senior officials and managers	37,407	9,364	39,181	8,471	35,700	7,797	34,291	7,743
Professionals	3,26,626	1,60,360	3,35,625	1,63,328	3,39,175	1,63,210	3,43,550	1,66,434
Technicians and associate professionals	97,799	34,143	87,581	26,501	87,660	24,919	96,766	28,995
Clerks	70,233	23,692	73,390	25,833	85,713	31,213	76,827	25,515
Service workers, shop and market sales workers	1,50,042	15,317	1,37,543	17,286	1,34,642	16,395	1,25,726	17,632
Craft and related trade workers	99,608	8,633	1,25,672	23,829	83,240	2,527	85,308	4,257
Plant and machine operators and assemblers	1,25,751	29,309	1,08,871	14,202	1,41,061	35,900	1,35,859	34,771
Elementary occupations	1,15,006	14,218	1,27,388	14,817	1,27,183	13,193	1,39,450	15,443
Legislators, senior officials and managers	37,407	9,364	39,181	8,471	35,700	7,797	34,291	7,743
Professionals	3,26,626	1,60,360	3,35,625	1,63,328	3,39,175	1,63,210	3,43,550	1,66,434
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Technicians and associate professionals	97,799	34,143	87,581	26,501	87,660	24,919	96,766	28,995
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Plant and machine operators and assemblers	1,25,751	29,309	1,08,871	14,202	1,41,061	35,900	1,35,859	34,771
Elementary occupations	1,15,006	14,218	1,27,388	14,817	1,27,183	13,193	1,39,450	15,443

Source: Department of Statistics, Government of Jordan

4.5.3 Emerging and demanding sectors and occupations in Jordan

Government of Jordan has unveiled the economic priorities programme for 2021-2023 and the priorities include support for priority economic sectors: ICT, agriculture, industry, tourism and energy⁸⁵

The Jordan vision 2025 identifies eight (8) high potential priority clusters to promote economic growth and drive job creation which are mentioned below.⁸⁶

- Construction and Engineering
- Tourism and Events
- Transport and Logistics
- Healthcare
- Financial Services
- Educational Services
- Digital Business and Services
- Life Sciences

Some of the economy's fastest growing industries like construction has shown strong demand characteristics. 41 per cent of the workforce in the construction industry is comprised of foreign workers, many of them undocumented workers in the informal sector.⁸⁷

85. Gov't unveils economic priorities programme for 2021-2023 - Ministry of Planning and International Cooperation (mop.govjo).

86. National Strategy for Human Resource Development 2016 – 2025 Jordan.pdf (unescwa.org).

87. Jordan 2025, A National Vision and Strategy. | UNEP Law and Environment Assistance Platform.

Table 9- Emerging and demanding sectors and occupations in Jordan

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programmes)	High Occupational demand areas	Skill Mismatch/ Gap
1	Construction	<ul style="list-style-type: none"> ■ Building Construction ■ Housing/ Residential Construction ■ Building Installation Services 	<p>Significant inflow of capital into the construction sector, which has benefited from an efficient and well-capitalized banking sector and very high amount of building and construction activity in recent years. There is an opportunity to grow and expand this cluster as Jordan becomes a regional hub for events and logistics, thus driving further commercial business activity, which requires more real estate assets and services.⁸⁸</p>	<ul style="list-style-type: none"> ■ Diploma in Civil Engineering ■ TSLC (Pre Diploma) in Civil Engineering ■ Pre-diploma (Apprenticeship) in Civil_ Building Construction ■ Multiple short term courses in Civil/ Construction in Construction Technician, Plumber, Mason, Carpenter, etc. 	Elementary and Low skilled work: Machinery Operators and Drivers, Stationary Plant Operators, Cleaners and Laundry Workers, Commercial Cleaners, Construction Labourers, Building and Plumbing Labourers, Packers, Farm, Forestry and Garden Workers	There are relevant programmes currently running in Nepal related to Construction sector
2	Tourism and Hospitality	<ul style="list-style-type: none"> ■ Hotels and restaurants ■ Real estate, including owned and leased properties ■ Travel agencies, tour operators and travel booking 	<p>The ongoing expansion of Jordan's 5-star hotel market and unique world-class facilities such as the King Hussein Conference Centre at the Dead Sea mean that the basic MICE infrastructure is already in place. Jordan already host to World Economic Forums and major international industry conferences and could win a greater share of the regional MICE market.⁸⁹</p>	<ul style="list-style-type: none"> ■ Apprenticeship) in Hotel Management ■ Short-term courses in Hotel Assistant, Lodge Assistant, General Cook, Fast Food Cook, Barista, Continental Cuisine Cook, Housekeeping Cleaner, waiter/ waitress 	-	There are relevant programmes currently running in Nepal related to Tourism and Hospitality sector
3	Manufacturing	<ul style="list-style-type: none"> ■ Loading and Unloading ■ Mobile and Stationery machines ■ Related elementary jobs ■ Industrial Electrician 	<p>Manufacturing is one of the Jordan's top five contributing sectors to GDP and significantly contribute to employment to Jordanians and Foreigners.⁹⁰</p>	<ul style="list-style-type: none"> ■ Diploma and Pre Diploma in Mechanical Engineering ■ Diploma in Mechatronics Engineering ■ Diploma and Pre Diploma in Automobile Engineering ■ Short term courses in Repairing and Maintenance of Pump Set, Assistant Welder, Boiler Operator, Junior Industrial Machine Operator, Metal Worker, etc. 		There are relevant programmes currently running in Nepal related to Manufacturing sector, but more specific and expertise level training programmes can be upgraded and added.

88. Jordan 2025, A National Vision and Strategy. | UNEP Law and Environment Assistance Platform.

89. Jordan 2025, A National Vision and Strategy. | UNEP Law and Environment Assistance Platform.

90. JEGProgramEnglish.pdf (ssf.gov.jo). (JORDAN ECONOMIC GROWTH PLAN 2018 – 2022).

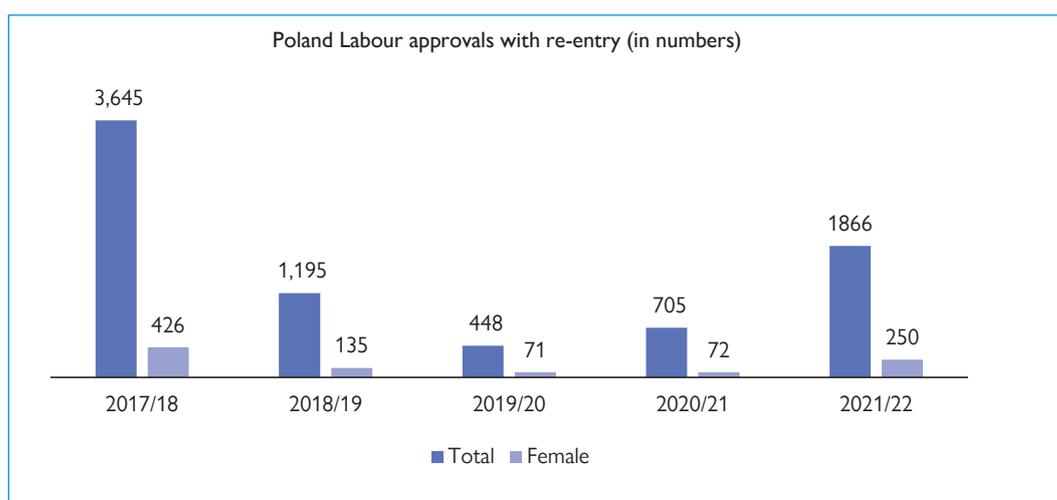
S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programmes)	High Occupational demand areas	Skill Mismatch/ Gap
4	Healthcare	<ul style="list-style-type: none"> Hospitals, clinics, laboratories, radiography clinics and veterinary activities Community and personal services activities including care services 	<p>The healthcare sector in Jordan has good reputation both regionally and globally. It has good number of qualified doctors and nurses and high investment in healthcare infrastructure. The sector produces a significant number of jobs, which are also generally high-skilled jobs. Job growth is expected to increase. Medical and wellness tourism is a particularly attractive opportunity for Jordan because of its unique combination of high-quality medical facilities and unique wellness assets such as the Dead Sea.⁹¹</p>	<ul style="list-style-type: none"> Diploma in Health Science Diploma in Medical Lab Technology Diploma in Pharmacy PCL (Diploma) in Midwifery PCL (Diploma) Nursing PCL (Diploma) General Medicine Short term courses in Caregiver, Dental Chairside Assistant, Physical Rehabilitation Assistant, Assistant Massage Therapist, Community Health Worker, Community Based Rehabilitation Facilitator, Early Childhood Montessori Facilitator 	-	There are relevant programmes currently running in Nepal related to healthcare sector

4.6 Poland

4.6.1 Labour migration outflow to Poland

Labour migration to Poland has shown impressive trend as an emerging destination country as highlighted below.

Figure 53- Poland Labour approvals with re-entry tom Poland as per DOFE Nepal data⁹²



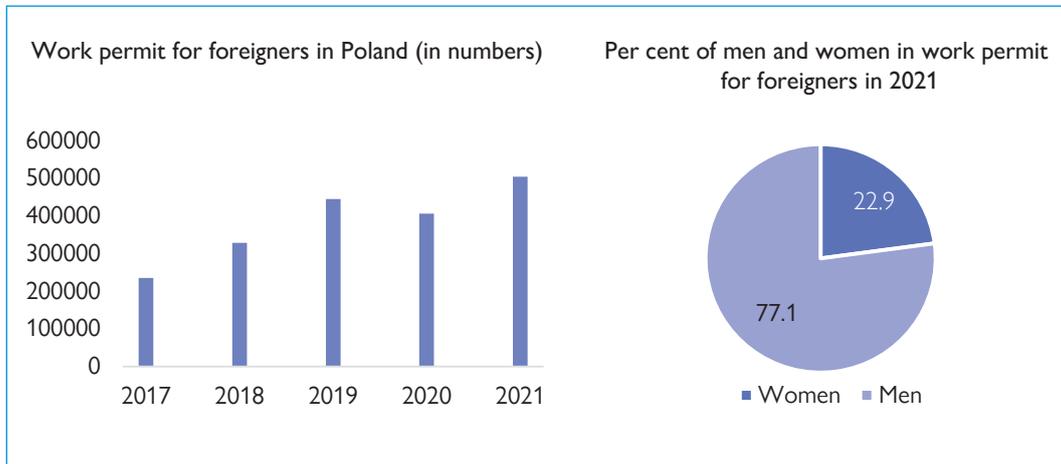
91. Jordan 2025, A National Vision and Strategy. | UNEP Law and Environment Assistance Platform.

92. Source: Department of Foreign Employment (DOFE), Nepal.

4.6.2 Employment trend in Poland

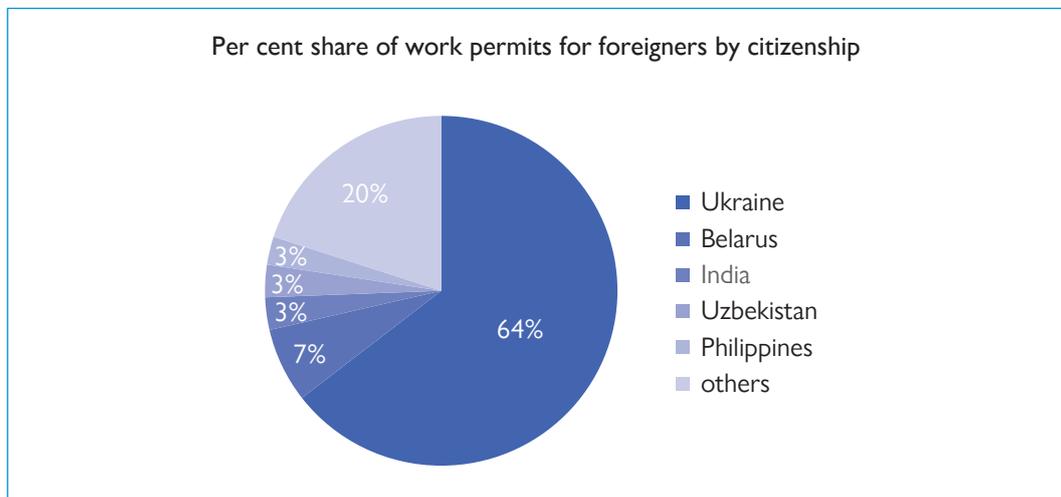
Work permits for foreigners in Poland in 2021 increased in numbers by 24 per cent as compared with 2020. In 2021, 504.2 thousand work permits for foreigners were issued in Poland which is eight (8) times more as compared with 2015.⁹³

Figure 54- Work permit for foreigners in Poland and share of men and women⁹⁴



In 2021, in Poland, work permits were issued to citizens of 146 countries. They were most often granted to citizens of Ukraine and a noticeable percentage of permits were also issued to citizens of India and Uzbekistan as highlighted below.⁹⁵

Figure 55- Per cent share of work permits for foreigners by citizenship⁹⁶



93. Statistics Poland / Topics / Labour Market / Studies / Work permits for foreigners in Poland in 2020.

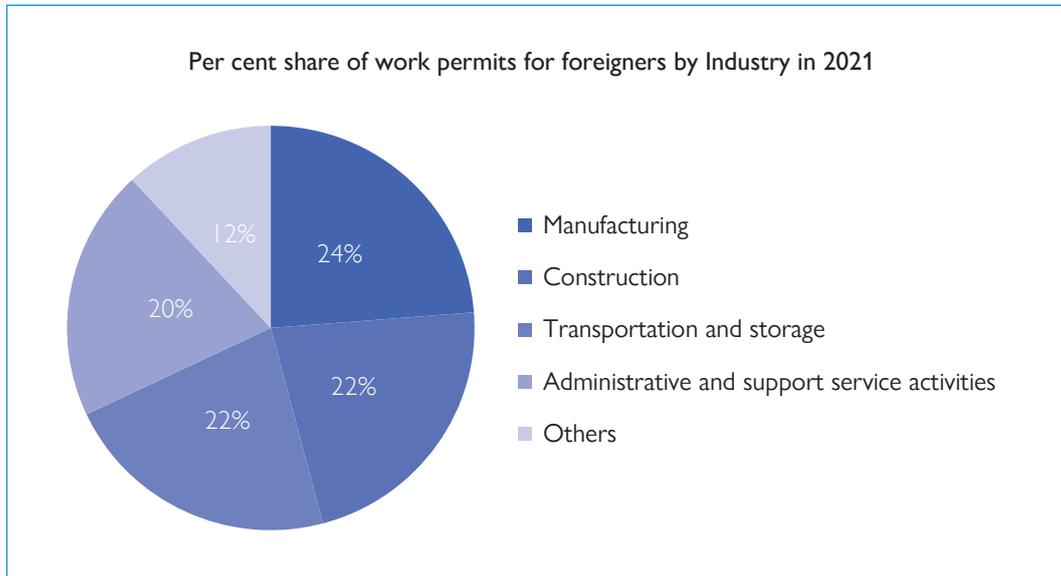
94. Source: Statistics Poland, Government of Poland.

95. Statistics Poland / Topics / Labour Market / Studies / Work permits for foreigners in Poland in 2020.

96. Source: Statistics Poland, Government of Poland.

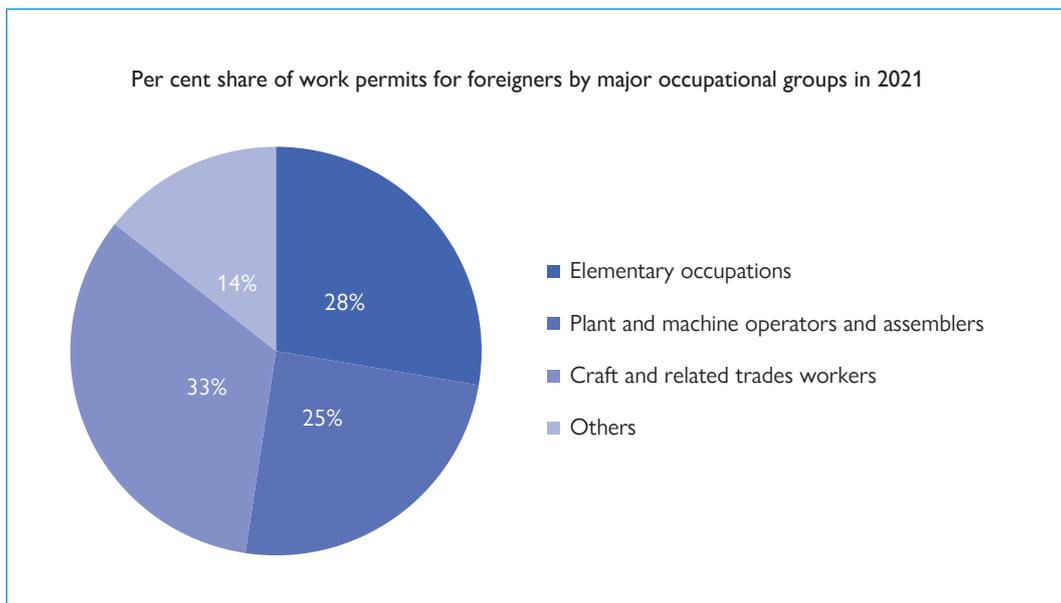
In 2021, foreign work permits are mainly issued in four (4) main sections as highlighted below.⁹⁷ In all voivodships, the total share of permits for the above-mentioned sectors was almost 80 per cent.⁹⁸

Figure 56- Per cent share of work permits for foreigners by Industry in 2021⁹⁹



The number of foreign work permits issued in major occupational group according to the Classification of Occupations and Specialisations (KZiS)/ISCO-08 is highlighted below.¹⁰⁰

Figure 57- Per cent share of work permits for foreigners by major occupational groups in 2021¹⁰¹



97. Statistics Poland / Topics / Labour Market / Studies / Work permits for foreigners in Poland in 2020.

98. work_permits_for_foreigners_in_poland_in_2021.pdf.

99. Source: Statistics Poland, Government of Poland.

100. Statistics Poland / Topics / Labour Market / Studies / Work permits for foreigners in Poland in 2020.

101. Source: Statistics Poland, Government of Poland.

4.6.3 Emerging and demanding job sectors and occupations in Poland

Occupation wise job vacancies in second quarter of 2022 was highest in professional occupation followed by craft and related trades workers as highlighted below.¹⁰²

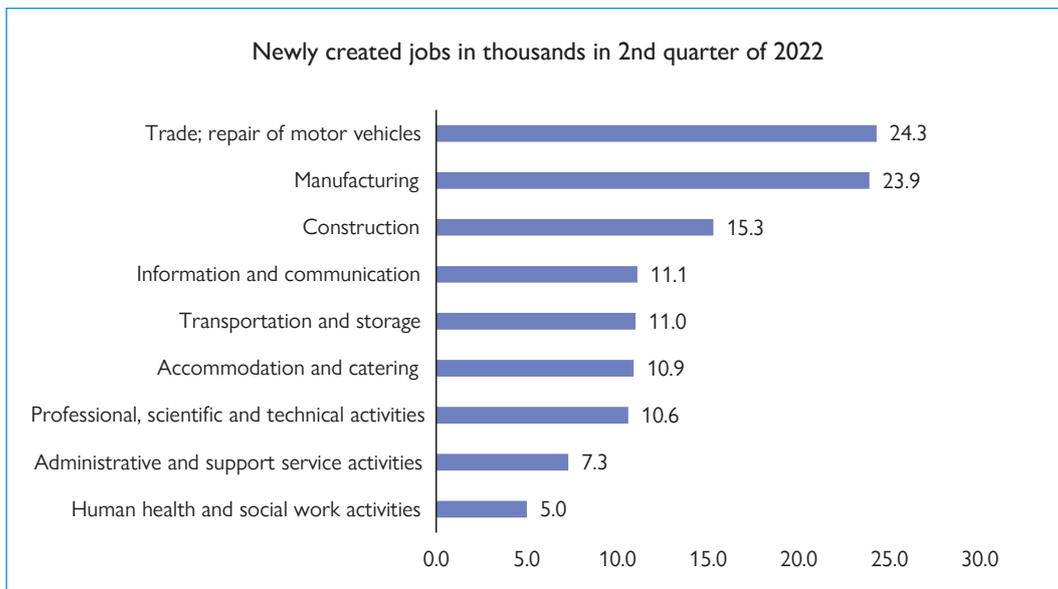
Figure 58- Share of occupation wise job vacancies in total number of vacancies (in Per cent)¹⁰³



Newly created jobs in first and second quarter of 2022 were 189.7 (in thousands) and 136.0 (in thousands) respectively. Sector wise newly created jobs in second quarter of 2022 were highest in Trade; repair of motor vehicles followed by manufacturing and construction sector as highlighted below.¹⁰⁴

Figure 59- Newly created jobs in thousands in 2nd quarter of 2022 (in thousands)

Table 10- Emerging and demanding sectors and occupations summary¹⁰⁵



102. Statistics Poland / Topics / Labour Market / Demand for labor / The demand for labour in the second quarter of 2022.

103. Source: Statistics Poland, Government of Poland.

104. Statistics Poland / Topics / Labour Market / Demand for labor / The demand for labour in the second quarter of 2022.

105. Source: Statistics Poland, Government of Poland.

Table 10- Emerging and demanding sectors and occupations summary

S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/Gap
1	Trade; repair of motor vehicles	<ul style="list-style-type: none"> Sales agents, salespeople, and brand representatives Polish network supermarkets Storekeeper Motor vehicles mechanic 	Highest created jobs in second quarter of 2022	<ul style="list-style-type: none"> Short term courses in professional motorcycle mechanic, professional light vehicle mechanic, junior auto mechanic, Professional Vehicle Body Repair Technician 	<ul style="list-style-type: none"> Professionals Craft and related trade workers Plant and machine operators and assemblers Service and Sales Workers 	Limited data on skill mismatch but Poland could be considered as emerging destination in this sector, and we could see relevance of ongoing skill training programmes in Nepal
2	Manufacturing	<ul style="list-style-type: none"> Machine tool operators Welders Machinists Electricians Electromechanical engineers Apparel workers, tailors or garment sewing specialists Equipment Operators Freight movers 	Second highest created jobs in second quarter of 2022	<ul style="list-style-type: none"> Diploma and Pre Diploma in Mechanical Engineering Diploma in Mechatronics Engineering Diploma and Pre Diploma in Automobile Engineering Short term courses in Repairing and Maintenance of Pump Set, Assistant Welder, Boiler Operator, Junior Industrial Machine Operator, Metal Worker, etc. 		Limited data on skill mismatch but Poland could be considered as emerging destination in Manufacturing sector, and we could see relevance with ongoing skill training programmes in Nepal
3	Construction	<ul style="list-style-type: none"> Woodworkers and carpenters Construction workers Steel fixers and concrete placers Electric Fitters Sheet metal workers Roofers, pavers, masons and plasterers Heavy equipment operators Finishing works specialists 	Third highest created jobs in second quarter of 2022	<ul style="list-style-type: none"> Diploma in Civil Engineering TSLC (Pre Diploma) in Civil Engineering Pre-diploma (Apprenticeship) in Civil_ Building Construction Multiple short term courses in Civil/ Construction in Construction Technician, Plumber, Mason, Carpenter, etc. 		Limited data on skill mismatch but Poland could be considered as emerging destination in Construction sector, and we could see relevance with ongoing skill training programmes as there are skill training programmes related to Construction sector.
4	Information and Communication	<ul style="list-style-type: none"> Programmers Mobile application developers Desktop software developers 	<p>Fourth highest created jobs in second quarter of 2022</p> <p>Large numbers of jobs created in second quarter of 2022</p>	<ul style="list-style-type: none"> Diploma in Information Technology (Engineering) TSLC (Pre Diploma) in Information Technology (Engineering) 		Limited data on skill mismatch but usually jobs and occupations in Information and Communication require higher skill levels which currently lacks in Nepal's training system.

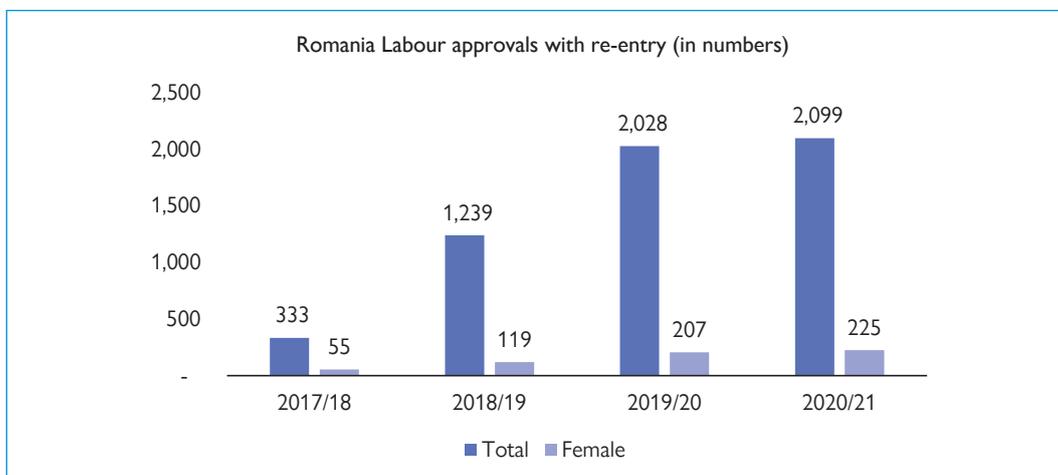
S. No.	Emerging/ Demand sector	Subcategory	Rationale for selection	Relevance to Nepal context (Existing training programs)	High Occupational demand areas	Skill Mismatch/Gap
5	Accommodation and Catering	<ul style="list-style-type: none"> ■ Cooks ■ Bakers ■ Chefs and Pastry chefs 	Large numbers of jobs created in second quarter of 2022	<ul style="list-style-type: none"> ■ Diploma in Hotel Management ■ TSLC (Pre Diploma) in Hotel Management ■ TSLC (Pre Diploma Apprenticeship) in Hotel Management ■ Short-term courses in Hotel Assistant, Lodge Assistant, General Cook, Fast Food Cook, Barista, Continental Cuisine Cook, Housekeeping Cleaner, waiter/ waitress, etc. 		Limited data on skill mismatch but Poland could be considered as emerging destination in Accommodation and Catering sector, and we could see relevance with ongoing skill training programmes relevant to Accommodation and Catering sector.

4.7 Romania

4.7.1 Labour migration outflow to Romania

Labour migration to Romania has shown impressive trend as an emerging destination country as highlighted below. Total labour approvals with re-entry reached 7,480 in 2021/22 which is significantly higher as compared to 2020/21.

Figure 60- Romania Labour approvals with re-entry as per DOFE Nepal data¹⁰⁶



4.7.2 Employment trend in Romania

According to the Labour Force Ledger as of January 2021, 5.4 million persons were employees in Romania out of which mostly were working in the services sector (3.4 million people), while 1.8 million persons were employed in the industrial and construction sectors. The number of employees in agriculture, forestry and fisheries was 0.1 million persons.¹⁰⁷

106. Source: Department of Foreign Employment (DOFE), Nepal.

107. Labour market information: Romania (europa.eu).

The main categories of employers are multinational companies, profit/non-profit state-owned companies, private companies and NGOs.

As per the National Agency for Employment data, highest number of unemployment at national level in March 2022 were seen in the following occupations: unskilled agricultural workers, unskilled packers of solid and semi-solid products, unskilled workers for building demolition, wall linings, mosaic, wall and floor tiling, parquet flooring, unskilled workers for road, highway, bridge and dam maintenance, freight handlers, loaders/unloaders, farmers, locksmiths, salespersons, personal assistants for severely disabled persons, and agricultural mechanics.¹⁰⁸

4.7.3 Emerging and demanding job sectors and occupations in Romania

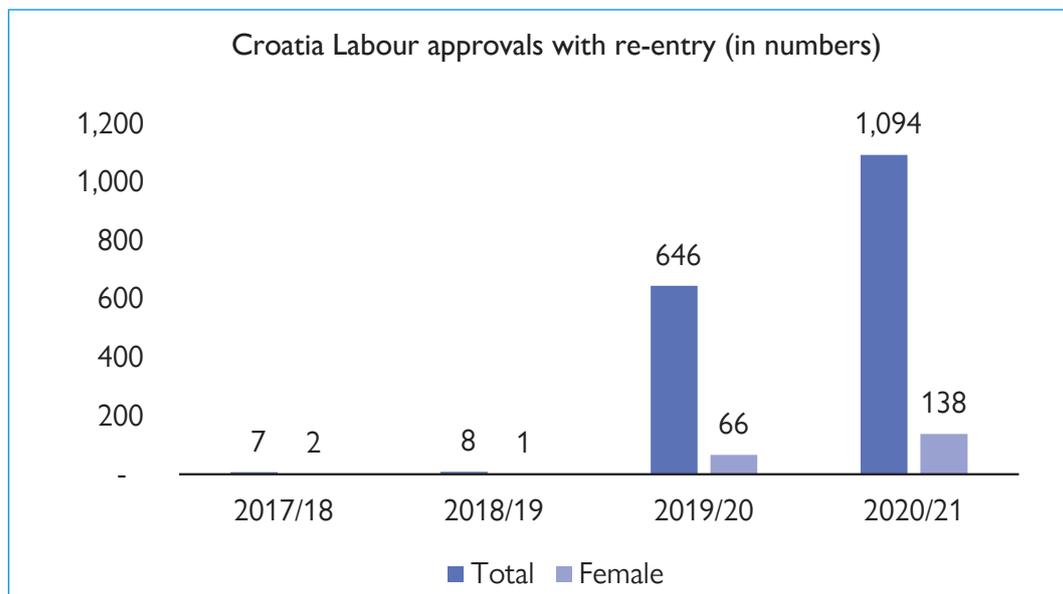
As per the National Agency for Employment data, most vacancies at national level were seen in the following occupations: unskilled assembly workers, commercial workers, unskilled construction workers, truck/heavy duty vehicle drivers, security guards, cargo handlers, salespersons, unskilled workers in the ready-made-garment industry, car and van drivers, and manual packers¹⁰⁹. Job vacancies highlights the demand in the sector or occupation as organizations are not able to find workers to fill various employment positions.

4.8 Croatia

4.8.1 Labour migration outflow to Croatia

Labour migration to Croatia has shown appreciable trend as an emerging destination country as highlighted below. Total labour approvals with re-entry reached 5,422 in 2021/22 which is significantly higher as compared to 2020/21.

Figure 61- Croatia Labour approvals with re-entry as per DOFE Nepal data¹¹⁰



108. Labour market information: Romania (europa.eu).

109. Labour market information: Romania (europa.eu).

110. Source: Department of Foreign Employment (DOFE), Nepal.

4.8.2 Employment trend in Croatia

According to the 2021 census, Croatia has a population of 38,88,529 inhabitants. As per the labour force survey, the working-age population (aged 15 and over) stood at 35,08,000, out of which 17,05,000 people were employed in the third quarter of 2021. The unemployment rate in the third quarter of 2021 was 6.3 per cent.

Workers with the following qualifications face challenges in finding employment at the National level: photographers, economists, business secretaries, administrative officers, graphic arts technicians, environmental technicians, fashion design technicians, tourism and hospitality operators.¹¹¹

4.8.3 Emerging and demanding job sectors and occupations in Croatia

The greatest labour shortages at National level have been seen for the following occupations:¹¹²

- Masons, carpenters, steel benders, concrete layers, welders, plasterers, construction fitters, construction machinery operators, stonemasons, crane operators, joiners, building construction workers, civil engineering workers, pipe layers, painters and decorators, roofers, plumbers, electricians, heating and air-conditioning system installers, hydro-insulation installers, metal structures fitters, ceramic tile layers, floor layers, insulation installers, tinsmiths, locksmiths, electrical fitters, maintenance electricians
- Truck drivers, semi-trailer truck drivers, car mechanics, car painters, car bodyworkers
- National cuisine chefs, butchers, bakers, confectioners
- Software developers, user interface designers, and system administrators

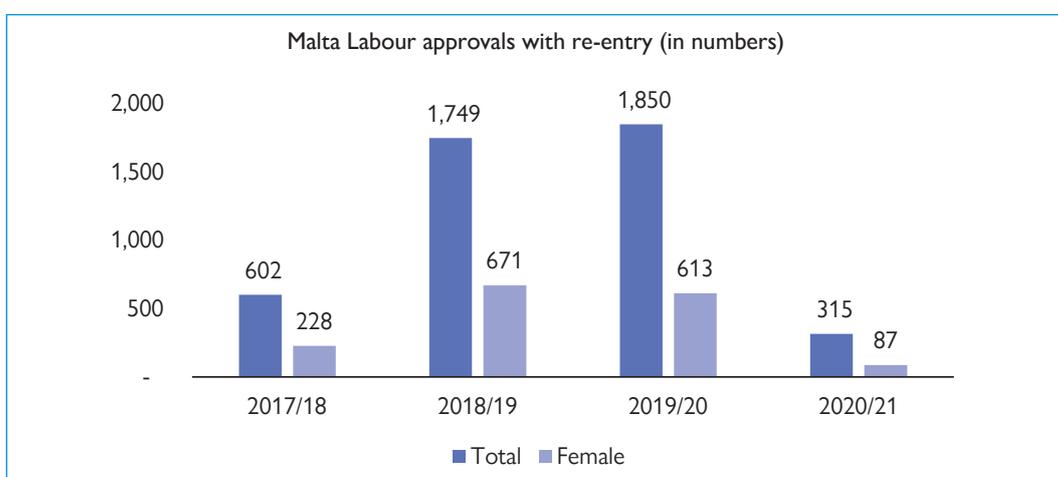
Job vacancies highlights the demand in the sector or occupation as organizations are not able to find workers to fill various employment positions.

4.9 Malta

4.9.1 Labour migration outflow to Malta

Labour migration to Malta has shown appreciable trend as an emerging destination country as highlighted below. Total labour approvals with re-entry reached 1,922 in 2021/22.

Figure 62- Malta Labour approvals with re-entry as per DOFE Nepal data¹¹³



111. Labour market information: Croatia (europa.eu).

112. Labour market information: Croatia (europa.eu).

113. Source: Department of Foreign Employment (DOFE), Nepal.

4.9.2 Employment trend in Malta

During the fourth quarter of 2021, the number of employed persons aged 15 years and over was 2,74,110 or 61.7 per cent of the population over 15 years of age and 2 per cent of that same group were unemployed (not working).

Among the female working population, 36.4 per cent were working in the sectors of public administration, defence, education, healthcare and social work, 21.5 per cent in the wholesale and retail sector, the motor vehicle and household appliances repair sector, hotels and restaurants, and transport sector, and 14.1 per cent in other services sectors.

Among the men working population, the majority (25.6 per cent) were working in the retail and wholesale sector, motor vehicle and household appliances repair sector, hotels and restaurants, and transport sector, 17.9 per cent were working in public administration, defence, education, healthcare, and social work sectors, 15.1 per cent in manufacturing, quarrying and other sectors.¹¹⁴

Professional sector category jobs are most common in general which accounts for 20.8 per cent. This category includes doctors, dentists, pharmacists, engineers, teachers, consultants and others with 26 per cent of women and 17.1 per cent of men also working in this sector.

At the end of January 2022, 26 per cent of persons registering for employment with Jobsplus (Public Employment Service) looked for mainly clerical work and 17 per cent looked for work in the technical and professional sectors. 16 per cent of men and 18 per cent of women looked for technical and professional work and 13 per cent of men and 17 per cent of women looked for work in sales and services.¹¹⁵

4.9.3 Emerging and demanding job sectors and occupations in Malta

The 20 most requested job/ skill types between October and December 2021 as per administrative information on vacancies in the PES (Public Employment Service) were as follows.¹¹⁶

Table 11- Occupation wise per cent of total vacancies between October and December 2021

S. No.	Occupation	Percentage of total vacancies
1	Delivery person	9.94
2	Cleaner	8.41
3	Clerk	7.83
4	Labourer Building Construction	5.08
5	Waiter	3.74
6	Security Guard	3.23
7	Machine Operator	3.12
8	Salesperson	2.63
9	Bricklayers And Stonemasons	2.45
10	Motorcycle Driver	2.02

114. Labour market information: Malta (europa.eu).

115. Labour market information: Malta (europa.eu).

116. Labour market information: Malta (europa.eu).

S. No.	Occupation	Percentage of total vacancies
11	Interviewer Market Research	1.87
12	Print Finishing and Binding Workers	1.81
13	Manager	1.74
14	Care Worker	1.72
15	Handyperson / Maintenance	1.51
16	Labourer (Incl. Factory Hand Unskilled Labourer)	1.36
17	Shop Supervisor	1.35
18	Kitchen Hand	1.33
19	Electrician Building and Related	1.23
20	Steel Worker	1.23

4.10 India

4.10.1 Number of Nepali Migrants in India

Table 12- Number of Nepali Migrants in India

Source	Year	Nepali Migrants in India
GEFONT	1998	2.8 million
Kaushik	2004	2.5 million
Seddon, Adhikari & Gurung	2002	1.3 million
CBS(Nepal)	2001	5,89,050
Adhikari and Gurung	2009	0.2 million (In Delhi Only)

Source: Compiled from different sources

Due to an open border, the exact figures of Nepalese living in India are not precise. Yet it is estimated that more than 3 million Nepalese reside in India to work and study. The 2011 census showed that of the total emigrants' population, 37.6 per cent had left for India, making it the most popular destination country for Nepalis. Seasonal migration to India is common, administratively and geographically easier to access, and allows for frequent returns home.

IOM conducted a study in Aug 2022 to better understand the migration movements between India and Nepal. It was found that three most prevailing sectors were agriculture, forestry and fishery sector (28 per cent), followed by hospitality (hotel and tourism) sector (15.8 per cent) and domestic (housemaid, babysitter) sector 10.9 per cent.

Indian army - Presently, 40,000 Nepalese citizens work in seven regiments of the Indian Army. Over and above, the Nepalese citizens are also serving in Indian police. The number of those Nepalese who retired from the Indian Army and who receive pension is 80,000. The Nepalese receive pensions in the same way as their Indian counterparts.

4.10.2 Opportunity Drivers for Nepali Migrants in India

The Geographical proximity of India and Nepal is one of the major factors that can be seen as an opportunity driver for Nepali Aspirant Migrants.

A peace and friendship treaty in 1950, between Nepal and India facilitates movement between Nepal and India. India serves as the low cost and low return destination for Nepali workers. Knowledge about destination appears to be very important for migrant workers. In the first instance, how he/she got information and what was the influence that led to the desire to migrate is the most relevant question. During a survey, it was found that most of the migrants were influenced by their friends (53 per cent) to come India followed by family (35 per cent) and relatives (14 per cent), which implies that at least the first-time migrant wants someone to be there at the destination. Many of the respondents had an opportunity to reach Delhi and contact one or more acquaintances.

India also acts as a transit country for many women migrants and proceed to the destination country through arrangements made by private recruitment agencies in India. The mobility is relatively easy, the channels of sending remittances are also largely informal. India has adopted a strategy of attracting foreign students. Nepali students fall in the top priority of India. The All-India Survey on Higher Education 2018/19 made public by the Human Resource Development Ministry of India in 2019 shows that Nepali students top the list of foreign students studying in India. Nepali students constitute 26.88 per cent of the total foreign students in India, states the survey report. During the review period, a total of 47,724 foreign students were enrolled in various educational institutions in India. Among them, there were around 13,000 students from Nepal.¹¹⁷

Taking into consideration five years of average study in higher level, it is estimated that there are around 65,000 Nepali students in India. Nepali students spend billions of rupees on tuition fees, admission, food and accommodation as well as transportation.

In an average, one Nepali student spends around INR 800,000 every year, according to the guardians who send their wards to India for higher education. Taking this into consideration, Nepali students spend around INR 52 billion for studying in India every year.

Large number of students from Nepal opt to study in Indian Universities for better opportunity in India, since cost of living and language barriers are minimal compared to western universities. Nepali students prefer STEM (Science, Technology, Engineering, and Math) majors by a disproportionately large margin, with math/computer science, physical/life sciences, and engineering being the most popular disciplines. This attraction towards STEM majors is likely owed to the fact that STEM education is still largely underdeveloped in Nepal and graduates in technical fields have better employment prospects when returning home.¹¹⁸ In recognition of the beneficial impact of financial remittances for economic growth, the governments of Bangladesh, India, Pakistan, and Sri Lanka allow non-resident citizens to maintain bank accounts in both foreign and local currencies without tax implications. This provision encourages non-resident citizens to transfer remittances and open accounts in their country of origin.

Easy financial flow - Nepal Investment Bank Ltd. (NIBL) has signed an agreement with BankOnUs, India in 2021 to offer 'Paisa Pathaune' app, a service for Nepali migrants and residents anywhere in India, to transfer funds from India to Nepal round the clock from their cell phones.

117. <https://www.newbusinessage.com/Articles/view/12475>

118. UNESCO Institute for Statistics (UIS)

Table 13- Emerging Sectors and Skills

Emerging Sectors	Emerging Skills in Demand
<ul style="list-style-type: none"> ■ Renewable energy jobs in solar sector ■ Li-ion Battery manufacturing plants set up ■ Semiconductor manufacturing plants to be set up ■ Mobile manufacturing companies entering market such as Apple 	<ul style="list-style-type: none"> ■ Construction Workers ■ Electrical and mechanical Worker ■ Technical Personnel ■ Supervisor and Foreman ■ Elementary Occupations ■ Service and Sales

4.11 Republic of Korea

4.11.1 Context

Korea says that the country's labour force is struggling to replace retiring workers in less skilled jobs. The number of youths aged 25-34 with less than tertiary education fell from 4 million to 1.4 million between 2005 and 2015 and will shrink below 1 million by 2025, even as many older workers retire. Vacancies for certain jobs have become difficult to fill.¹¹⁹

While the share of foreigners, about 3.7 per cent of the active population, is still low in international comparison, it has increased sharply over the past decade, partly due to one of the largest temporary labour migration programmes in the OECD. About 60 per cent of foreigners in Korea today come through a work-visit programme for ethnic Korean Chinese or as temporary labour migrants under a specific scheme, the Employment Permit System (EPS).¹²⁰ They contribute to an increase in the foreign population between 2005 and 2015 which was the steepest in the OECD.

Foreign workers are primarily employed by SMEs, especially in the manufacturing sector, where they comprise 10 per cent of employment, up from less than 2 per cent a decade earlier. About one in ten employers with more than five employees rely on filling at least some vacancies with foreign workers. Korean workers in these jobs tend to have high turnover, and the job quality is low, but foreign workers generally work maximum overtime at minimum wage and stay with these firms for longer periods.

- I. Employment Permit System (EPS)- Korea's flagship temporary labor migration program Employment Permit System (EPS) admits about 60,000 workers annually under a quota fixed by the government, strikes a balance between the employer and the worker.
- II. EPS contains a number of protections to prevent negative effects on local workers and to safeguard the rights of foreign workers. Bilateral agreements with partner countries and several steps of selection limit the possibility for rent-taking which plague such programmes in many other countries. More efforts are being made to provide foreign workers to those employers who improve conditions.
- III. Changes in the recruitment programme to select for and prioritise higher-skill workers, and to extend stay to up to 10 years for higher productivity workers, may turn the programme into more than just an unskilled labour migration scheme.

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

120. <https://www.oecd-ilibrary.org/sites/be5d6380-en/index.html?itemId=/content/component/be5d6380-en>.

- IV. Transparency in Recruitment and extensive preparation
- V. Full Protection for Migrants under the Korean Labour law
- VI. Complaints Mechanism and Support Service for Migrant Workers

4.11.2 Emerging Sectors and Jobs for Migrants

Technological advances are automating an increasing number of tasks traditionally performed by humans. Initially, automation focused primarily on routine tasks (e.g., clerical work, bookkeeping, basic paralegal work and reporting), but with the advent of Big Data, artificial intelligence (AI), the Internet of Things and ever increasing- computing power (i.e., the digital revolution), non-routine tasks are increasingly likely to become automated.

The diffusion of industrial robots perhaps best epitomises technological penetration and fears of job automation in the workplace. Robots have been used for decades, but their diffusion has recently accelerated and spread beyond the manufacturing sector. For example, supermarkets have started to employ robots as shop assistants, and Amazon and other retailers are piloting cashier-less stores. Data from the International Federation of Robotics show that orders of industrial robots increased threefold between 2003 and 2015, and the trend is projected to accelerate further

Further the focus is also shifting towards:

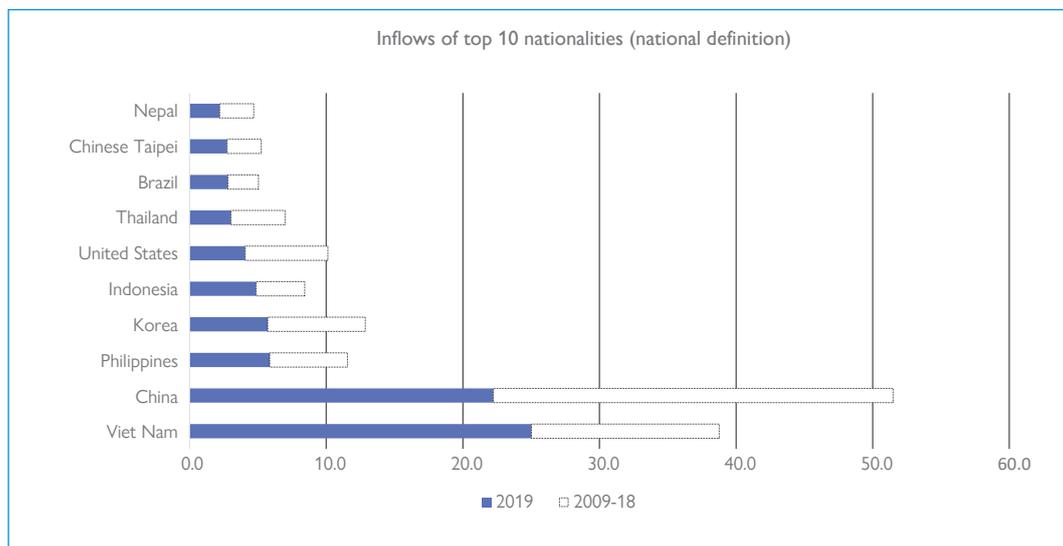
- i. Workers in the field of R&D and commercialisation of New and Renewable Technologies.
- ii. Labour for providing infrastructure building for private sectors working in New and Renewable technologies field.
- iii. Republic of Korea's SMEs mainly need workers in agriculture, fishing, manufacturing, and construction, among other blue-collar sectors.

4.12 Japan

Nepal and Japan have signed an agreement, for migration of Nepali workers to Japan, one of the most lucrative labour destinations for Nepali workers, under the government-to-government modality.

4.12.1. Opportunity Drivers for Migrants in Japan

Figure 63- Inflows of nationalities



- Labor market shortages due to rapidly aging population: Need for migrant workers.
- Migrants fill labour shortages in key sectors – such as manufacturing, domestic and care work, construction, services and agriculture.¹²¹
- New Focus on Medium-Skilled Employment Visas. Until now Japan has prioritized admissions for highly skilled and skilled occupations but has imposed firm limits on the stays of low-skilled workers. The new system provides for two new visa categories: Specified Skilled Worker 1 (SSW1) and Specified Skilled Worker 2 (SSW2.)
- Technical Intern Training Program (TITP)
- The Technical Intern Training Program was established in 1993 to enable foreign nationals to acquire skills etc. through on-the-job training while in employment, thereby contributing to effective technology transfer and human resources development as part of Japan's international contributions.

The number of newly entering foreign nationals with the status of residence of “Technical Intern Training (i)” was 76,456 in 2020, a decrease of 97,249 (56.0 per cent) compared to 2019. According to the statistics by nationality/region, the largest number of newly entering foreign nationals with the status of residence of “Technical Intern Training (i)” came from Viet Nam at 41,341 (54.1 per cent), followed by China at 11,049 (14.5 per cent), Indonesia at 8,261 (10.8 per cent), the Philippines at 5,119 (6.7 per cent) and Myanmar at 3,543 (4.6 per cent).¹²²

4.12.2 Occupational Sectors Approved for Specified Skilled Workers

Sector	Sector
Agriculture	Automobile maintenance
Aviation	Building cleaning
Construction*	Electric and electronic information
Fisheries	Food and beverage processing
Food service industry	Lodging
Industrial machinery manufacturing	Material processing
Nursing care	Shipbuilding and ship dash related sectors*

**Indicates sectors also approved for the SSW2 permit. Italics indicate sectors for which there is no existing stream from the Technical Intern Training Program (TITP) and for which exams are required for all applicants. Source: Japan International Training Cooperation Organization*

In 2019, Japan began to set aside the decades-old distinction in its migration regime between “un/low-skilled” work and highly skilled professional employment, hoping to bring in as many as 350,000 medium-skilled foreign workers over five years to fill labour market gaps in a rapidly aging society.

- The changes ushered in with legislation passed by Japan's Diet in December 2018 make possible labour migration for two categories of medium-skilled workers in 14 labour-shortage sectors.
- One category is for temporary workers who can remain a maximum of five years; the second allows unlimited visa renewals and accompaniment by family members, inherently opening a path to permanent settlement.
- The system is intended to flexibly adjust admissions in response to economic conditions, setting a maximum cap of 350,000 migrants over five years.
- The expansion of visa programmes and eased regulations have underlain the increased immigration.

121. https://www.ilo.org/wcmsp5/groups/public/---asia/---ro_bangkok/documents/briefingnote/wcms_766631.pdf

122. 001361699.pdf (moj.go.jp)

4.13 Portugal

4.13.1 Context

Figure 64- Top 10 EU Countries for Nepali Worker

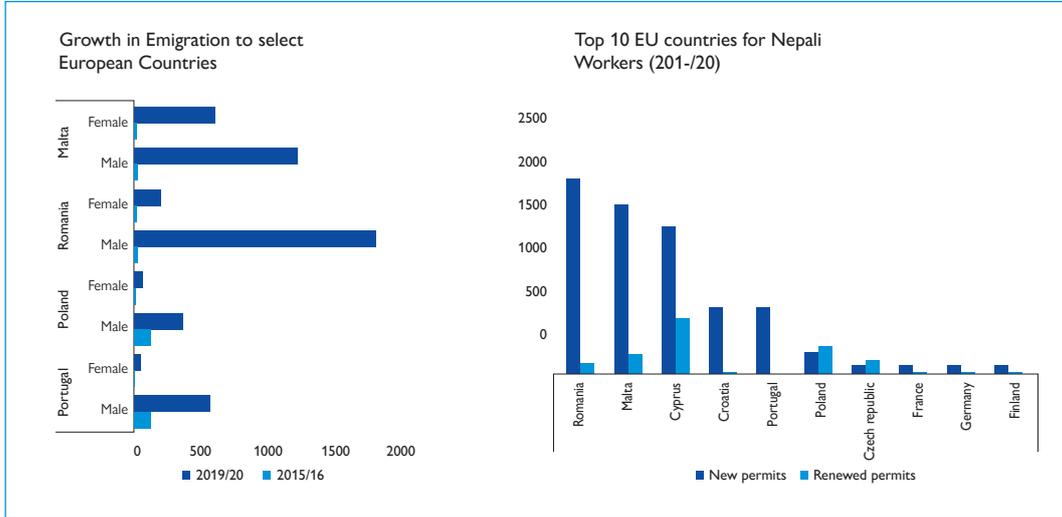
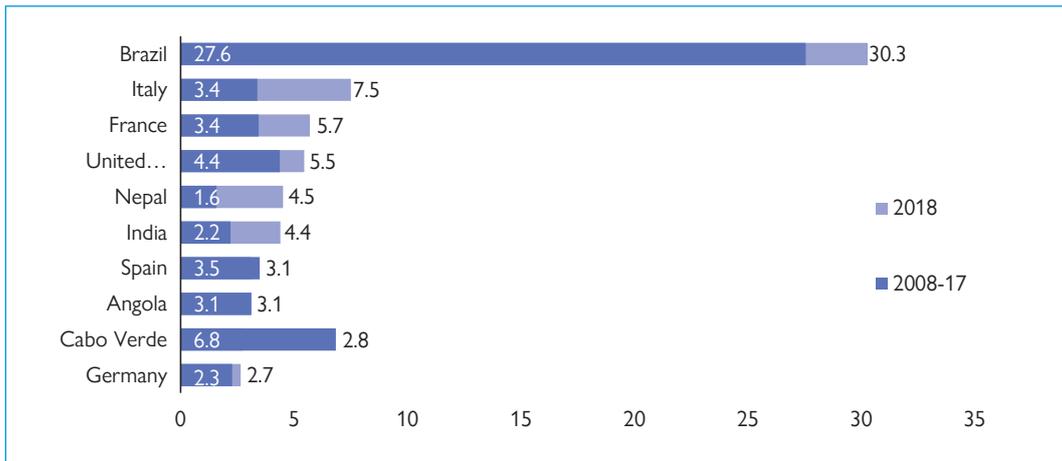
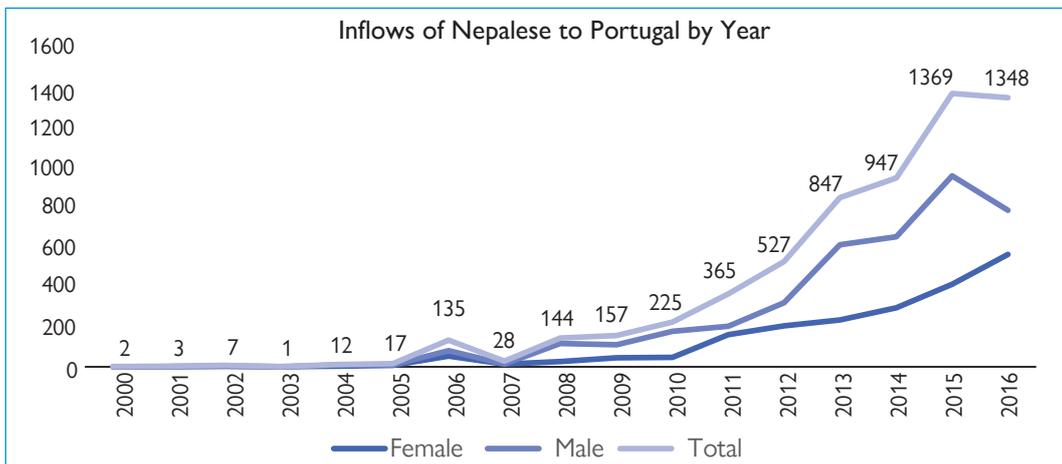


Figure 65- Inflows of Nepali in Portugal by Year



Source DOFE

Figure 66- Male and Female Inflow in Portugal



Source: SEF (by request 2000-2013; SEF-statistics 2014-2016)

In 2010, there were less than 800 Nepalis with resident status but in 2022, that number had swelled to 50,000.¹²³ The current sectors preferred by Migrants are Tourism industry, Hotels and catering, Call centre jobs (Call centre industry has recently flourished. Industry has been able to provide good opportunities for multilingual workers).

Manufacturing industry and its modernization is leading to job opportunities Realty sector as government at the time was also seeking funding in order to be able to build housing, where municipalities would also be able to contribute to housing support through Portugal's recovery plan and resilience. Agriculture - A major area is in Southern Portugal's farms and greenhouses. It is supported by the emergence of recruitment agents' networks.

4.13.2 Opportunity Drivers for Migrants in Portugal

- I. Labour force shortage especially in construction, hospitality, and tourism sector.
- II. High rank in Travel and Tourism Competitiveness Index (WEF, 2019).
- III. Authorities' ambitious investment plans under the Next Generation EU (NGEU, also called the European Union Recovery Instrument) is a European Union (EU) economic recovery package to support the EU member states to recover from the COVID-19 pandemic –including in skill building, digitalization and climate sustainability — are important elements to strengthen the resilience of the tourism sector and facilitate reallocation of resources in Portugal.
- IV. Green jobs due to “Portugal’s vision for low GHG emissions was formulated in the Roadmap for Carbon Neutrality 2050 (RCN) and set out in the National Energy and Climate Plan (NECP)”. Portugal’s Recovery and Resilience Plan (RRP) presents measures that will support decarbonization and energy objectives outlined in the NECP and RNC. Almost a fifth of Portugal’s RRP funds (€3.06 bn, 2 per cent of 2020 GDP under 16 components of the RRP) have been allocated to Climate Transition pillar.
- V. The Migration Policy 18 Index, which is an international standardized index for measuring integration policies, ranked Portugal as the second country in having the most desirable integration policy after Sweden for the year 2014 (MIPEX, 2015).

4.13.3 Policy Amendments to Attract Migrants

- Amended immigration law to tackle labour force shortage –
- Asylum, Migration and Integration Fund (AMIF) is set up for the period 2021-2027, with a total of EUR 9.9 billion. The Fund aims to further boost national capacities and improve procedures for migration management.
- Undocumented immigrants are free to apply for jobs and can request residency if they find one
- Easy path for a citizenship - Poland is a transit country for many Nepalis who are headed into western Europe – most of them to Portugal given foreign workers can get residence and citizenship after five years. In fact, all roads in Europe seem to lead to Portugal, where there are now 16,849 Nepalis residing legally. It also revised the nationality law in 2006 which widened the prospect for all immigrants to receive Portuguese citizenship which was previously only accessible to people coming from Portuguese speaking countries.

123. https://www.ilo.org/wcmsp5/groups/public/---asia/---ro_bangkok/documents/briefingnote/wcms_766631.pdf.

4.14 Malaysia

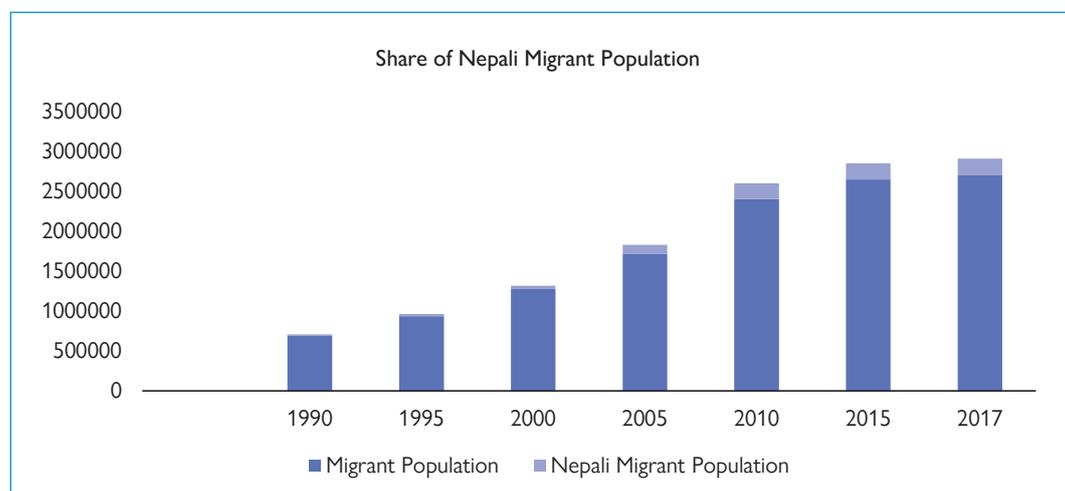
4.14.1 Context

For Nepali workers, Malaysia has been the top destination for labour migration since 2008 when the government started keeping records of labour migrants. In 2019, Nepali mission in Malaysia reported approximately 500,000 Nepalese living in Malaysia.

According to the World Bank, Nepali migrant workers in Malaysia sent home \$8.1 billion in 2018, making it the 19th largest beneficiary of funds sent by migrants around the world.

The Malaysian government aims to boost the growth of its green technology sector, with a targeted revenue of MYR 180 billion while creating more than 200,000 green jobs by 2030. Greening of the regional economy also demands that the people/ migrants in the region specialise in the right skills, adapt to changes and seize the new opportunity.

Figure 67- Share of Nepali Migrant Population



Malaysian Prime Minister Dr Mahathir Bin Mohammad, in the 25th ASEAN Labour Ministers Meeting held in November, 2018 had announced that Malaysia has put its focus on promoting green industries and jobs in the ASEAN countries. The south-east Asian country hopes to promote the identification of the potentials and prospects for green industries and jobs in the ASEAN member countries.¹²⁴

Boom in the employment rates of green industries is seen across ASEAN countries.

According to the 2017 Annual report by the Developmental Bank of Singapore, over the last two years, employment has grown by 3.2 per cent compared to the overall economic growth of five to six per cent, which is almost 1.4 million new green jobs created, as reported in the Development Bank of Singapore Annual Report 2017 on Green Job Opportunities in ASEAN.

In the same vein, Malaysia has seen strong growth, particularly in the renewable energy sector such as wind and solar power, as well as the production of equipment and installations for heating and energy saving that subsequently create jobs in the region, therefore for aspiring Nepali migrants this would be appropriate time to migrate to Malaysia.

124. <https://www.entrepreneur.com/en-au/news-and-trends/malaysia-hopes-to-create-200000-green-jobs-by-2023-in-asean/324085>

4.14.2 Emerging Jobs and Sectors

Figure 68- Green Technology Definition by Sectors



Image source: ILO's Green Jobs Programme for Asia and the Pacific (Green Jobs-AP)

The green jobs mapping study in Malaysia was conducted under ILO's Green Jobs Programme for Asia and the Pacific (Green Jobs-AP). The mapping study for Malaysia follows the working definition of green jobs as identified by ILO and United Nations Environmental Program (UNEP).¹²⁵

According to this definition, green jobs are “the direct employment in economic sectors and activities, which reduces their negative environmental impacts, ultimately resulting in levels that are sustainable”.

In addition, to be a green job, a job also has to meet the “decent work” criteria, which involves “adequate income from productive work with social security, respect for worker and social rights and the opportunity to voice and defend interests collectively”.

United Nations Framework Convention on Climate Change (UNFCCC) and the Kyoto Protocol. Actions taken by Malaysia are seen in the National Policy on Climate Change as well as a voluntary pledge of reducing of up to 40 per cent in terms of emission intensity relative to GDP by the year 2020 compared to 2005. At the national level, climate change related concerns are addressed through various sector such as energy; forestry and natural resource management; land-use planning; agriculture; solid waste; and drainage and irrigation.

Malaysia's Vision 2020 is to achieve high-income status through inclusive and sustainable growth. Ensuring inclusiveness and sustainability is anything but trivial. Malaysian policy-makers are faced with the challenge of moving the economy away from competing on costs

125. https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---gjp/documents/publication/wcms_461895.pdf

and natural resources to an economy that is driven by productivity, innovation and that can attract and retain capital, sustainable companies and the best human resource talent.

This transition to a green economy in Malaysia is progressing with the implementation of various environment and climate change related policies and measures to drive greater environmentally sustainable economic growth. This structural change towards a greener and more sustainable economic growth path will create demand for new green technologies, green skills and green jobs and will have implications on the employment and labour market dynamics in Malaysian economic sectors.

It is important to ensure that any new jobs created for workers in these environment-related sectors and green sub-sectors are decent and sustainable and that existing decent work deficits are addressed. The mapping study was conducted to estimate and identify green jobs in Malaysia and identified potential challenges to developing a greener economy with green jobs and decent work.

Table 14- Sector Wise Jobs

Green sector	Total jobs in the sector	Core environment jobs	Decent jobs	Green jobs
Agriculture	1400000	122745	390708	122253
Energy	NA	5510	35261	5510
Wastewater management	NA	9960	9960	9960
Solid waste	NA	15780	15780	15780
Transport	312962	46577	46577	46577
Construction	974488	10906-46155	552028	10906-46155



CHAPTER 5

NEPAL EXISTING SKILL TRAINING SYSTEM

This chapters covers the Skill Training System in Nepal, and the data has been sources via secondary research and primary research (survey)

Primary research (survey) data is gathered via interactions conducted in Nepal by EY-CESLAM team which includes interaction with 63 training institutions providing skill training programmes which are geographically located in Kathmandu (51), Bhaktapur (5) and Lalitpur (7).

5 Context

The Ministry of Education, Science and Technology (MOEST) is the lead ministry responsible for TVET sector policy making, planning, and setting TVET strategy in Nepal. Federal ministries are also involved in the delivery of TVET programmes together with numbers of non-government organizations, private firms and projects supported by different donor agencies. The Council for Technical Education and Vocational Training (CTEVT) under the Ministry of Education, Science and Technology (MOEST), Vocational and Skill Development Training Center (VSDTC) under the Ministry of Labour, Employment and Social Security (MOLESS) and Micro, Cottage and Small Industry Promotion Centre under the Ministry of Industry, Commerce and Supplies are some major agencies responsible for TVET delivery in Nepal.

Federal ministries are considered as line ministries regarding the implementation of TVET programmes delivery.

5.1 Ministries and their specialized entities associated in TVET

As 12 federal ministries are considered as line ministries regarding the implementation of TVET programmes delivery, some of them are highlighted in the below table.¹²⁶

Table 15- Federal ministries executing TVET and their entities associated

S. No.	Line Ministry for TVET Programmes	Entities executing TVET Programmes
1	Ministry of Education, Science and Technology (MOEST) - Lead ministry responsible for TVET sector	<ul style="list-style-type: none"> Council for Technical Education and Vocational Training (CTEVT) Center for Education and Human Resources Development (CEHRD) Enhanced Vocational Education and Training Project – Second (ENSURE II) Skills Development Project (SDP) National Vocational Qualification System (NVQS) Enhanced Vocational Education and Training Project (EVENT) TVET Practical Partnership Programme (SAKCHYAMTA)
2	Ministry of Labour, Employment and Social Security (MOLESS)	<ul style="list-style-type: none"> Vocational and Skills Development Training Center (VSDTC) Safer Migration (SaMi) Project

126. Comprehensive TVET Annual Report 2075 - Ministry of Education, Science and Technology.

S. No.	Line Ministry for TVET Programmes	Entities executing TVET Programmes
3	Ministry of Culture, Tourism and Civil Aviation	Nepal Academy of Tourism and Hotel Management Nepal Mountain Academy Nepal Cultural Corporation
4	Ministry of Industry, Commerce and Supplies (MOICS)	Department of Cottage and Small Industries Cottage & Small Industry Development Board
5	Ministry of Youth and Sports	National Youth Council
6	Ministry of Health and Population	National Health Training Center
7	Ministry of Forest and Environment	Forest Research and Training Center
8	Ministry of Agriculture and Livestock Development	No special entity
9	Ministry of Women, Children and Senior Citizens	No special entity
10	Ministry of Land Management, Cooperatives and Poverty Alleviation	No special entity

Source: Comprehensive TVET Annual report 2075 - Ministry of Education, Science and Technology 5.2 Council for Technical Education and Vocational Training (CTEVT)

5.2 Council for Technical Education and Vocational Training (CTEVT)

CTEVT under MoEST is a national autonomous apex body for TVET sub sector in Nepal. CTEVT is actively involved in conducting skills development training programmes and National Skills Testing Board (NSTB) which come under the umbrella of CTEVT is conducting skills testing. Different Types of TVET institutes under CTEVT are highlighted in the table below.¹²⁷

A huge number of technical training providers (TTPs) have not been registered or affiliated with the CTEVT. The expansion of TTPs is increasing in recent years and the short-term training TTPs totalled 1,131 in 2020 alone.¹²⁸ As CTEVT is an apex body for TVET in Nepal, survey data indicated that around 50 per cent of 63 training institutions are not affiliated/registered to CTEVT.¹²⁹

Table 16- Different Types of TVET institutes under CTEVT

Institution type	Number
Training Institute for Technical Instruction (TITI) - Staff-training institute under CTEVT	1
Constituent Institutes (operated by CTEVT own management)	63
Privately managed institutes – CTEVT Affiliated	429
Institutes managed in partnership modality under CTEVT	42
Technical Education in Community Schools (TECS) institutes under CTEVT	572
Institutions/ Training Centres offering vocational short courses affiliated to CTEVT	1370

Source: www.ctevt.org.np/ctevtmapping and Annual Report of CTEVT for 2077-78

127. CTEVT Mapping System.

128. TVET Journal Vol. 2 2022.pdf (ctevt.org.np).

129. Source – EY-CESLAM primary research.

5.3 Types of Skill development training programmes running in Nepal

Skilling people is channeled through formal, informal or non-formal education systems in Nepal. Formal education includes structured curriculum and mode of delivery.

Skills development in formal system includes four (4) different types of programmes in Nepal as mentioned below.¹³⁰

- Short-term training programme
- Professional training programme
- Secondary level education (including diploma level programme)
- Technical higher education level education programme

A summary of different levels and types of training programmes are highlighted in the table below.

Table 17- Different types of training programmes running in Nepal

Level	Programme	Offered By
Bachelor's and Master's level programmes - Technical higher education level	Bachelor's in Engineering, Agriculture, Medicine, Forestry and Hotel Management	Universities
Diploma and Proficiency Certificate Level (PCL) programmes (Secondary level)	Diploma/ PLC in Engineering, Health, Agriculture and Forestry Science, Hospitality and Others	CTEVT and affiliated institutions
Pre-diploma level/ TSLC programmes (Secondary level)	Pre-diploma in Engineering, Agriculture and Hospitality and Others	CTEVT and affiliated institutions
9-12 level TVET programmes (Secondary level)	Civil Engineering, Computer Engineering, Mechanical Engineering, Agriculture, and Veterinary Science.	Public secondary schools
Vocational Courses - Short term course	Different Occupations as demanded by labour market	CTEVT and affiliated institutions, Government Agencies and Donor Supported Projects
Professional Courses	13 professional courses offered by CTEVT, e.g., Professional Welder, Professional Vehicle Body Repair Technician, etc.	Mostly managed by the private sectors in Nepal and some professional courses under CTEVT

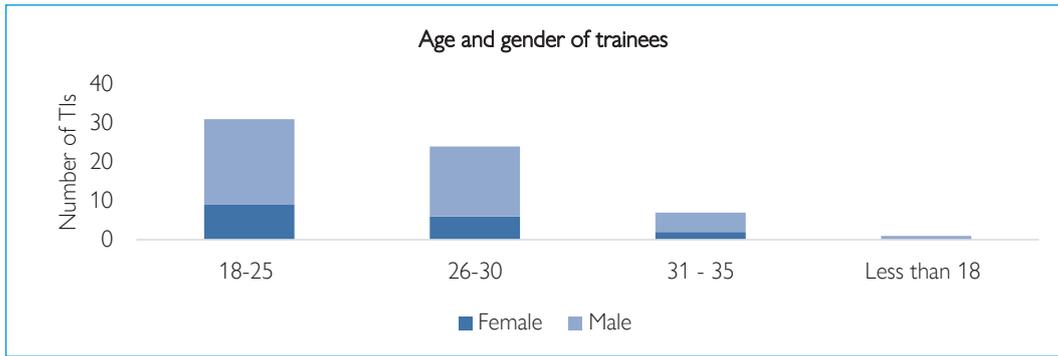
Source: Secondary Research and TVET Journal Vol. 2-2022(CTEVT)¹³¹

Survey data indicated that 18-25 years age group is most associated with training programmes followed by 26-30 years age group and very less proportion of Less than 18 years age group as highlighted below.

130. TVET Journal Vol. 2 2022.pdf (ctevt.org.np).

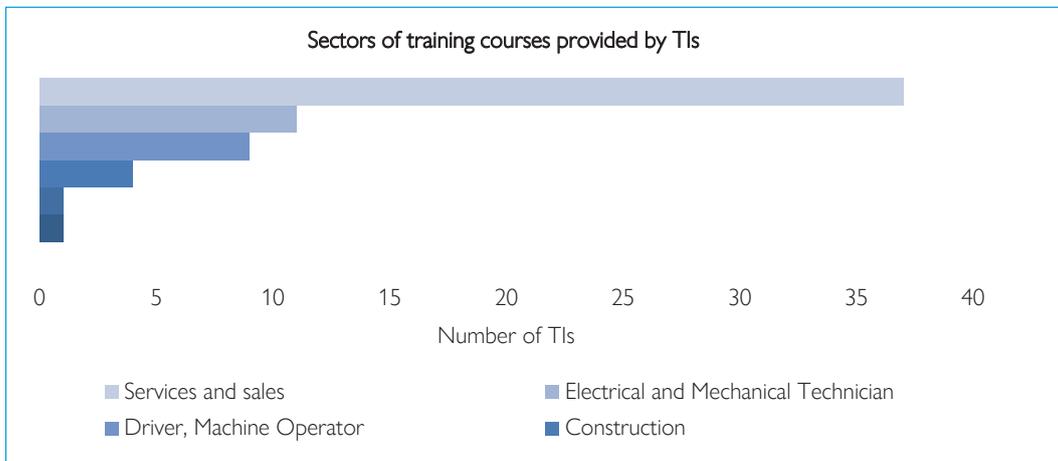
131. TVET Journal Vol. 2 2022.pdf (ctevt.org.np).

Figure 69- Age and Gender of trainees enrolled in Training Institutions (TIs) ¹³²



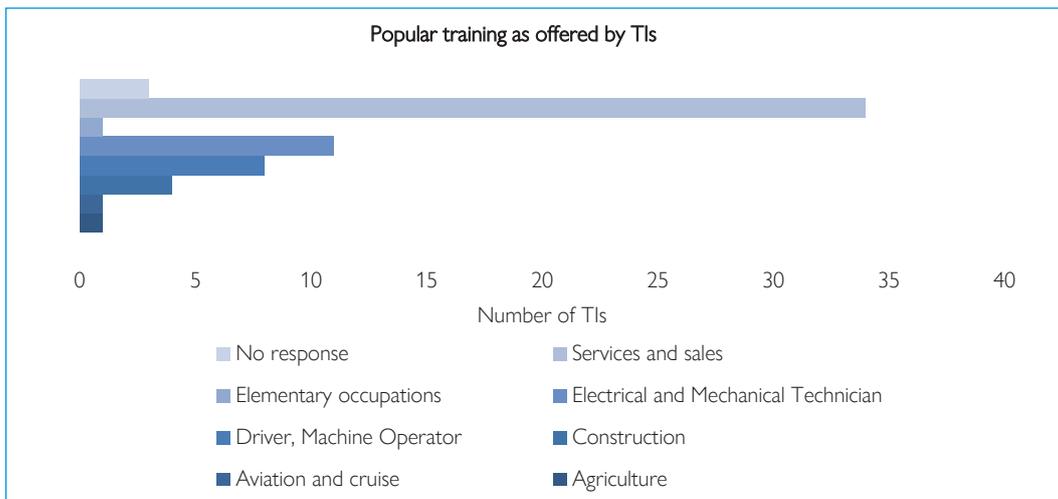
Survey data indicated that Services and Sales training courses are mostly provided by the training institutions followed by Driver, machine and Operator as highlighted below.

Figure 70- Sectors of Training Courses in Training Institutions (TIs)¹³³



Survey data indicated that Services and Sales training courses is most popular among trainees followed by Electrical and mechanical technician as highlighted below.

Figure 71- Popular training programmes offered by Popular training as offered by Training Institutions (TIs)¹³⁴



132. Source – EY-CESLAM primary research.
 133. Source – EY-CESLAM primary research.
 134. Source – EY-CESLAM primary research.

5.3.1 Short term training programme

Short term vocational training is the provision of providing need-based training in specific skills to the target population. Similarly, short term training is employment-based training to develop competencies in specific occupations.

These are implemented by several ministries and their constituent organizations. Likewise, non-governmental organizations are also involved. The short-term training in Nepal focuses the traditional based occupations, but lags in market demanded occupations like Informational Technology, Software Development, Artificial Intelligence driven occupations, etc. These short-term trainee's skill test is conducted by National Skill Testing Board (NSTB). A snapshot of short-term training programmes is highlighted in the table below.

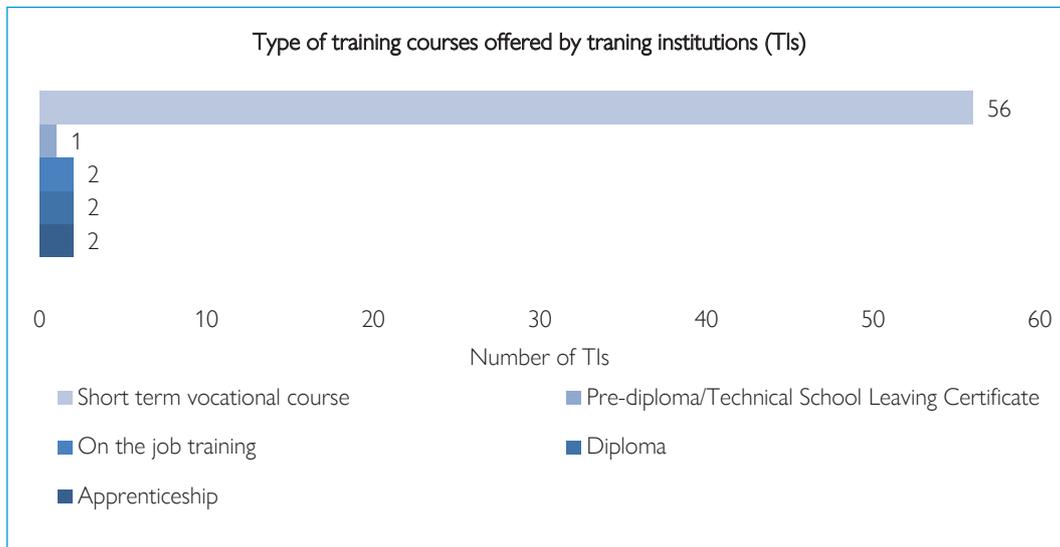
Table 18- Short term training programmes statistics - CTEVT

Particular	Number
Number of Short-Term Vocational Curriculum (Developed by CTEVT)	260
Number of Skill Standards (Developed by CTEVT)	304
Public Training Providers (CTEVT affiliation)	676
Private Training Providers (CTEVT affiliation)	1370

Source: TVET Journal Vol. 2-2022(CTEVT) ¹³⁵

Survey data indicated that 56 out of 63 training institutions are providing short term training courses. Types of training courses being provided by those 63 trainings institution are highlighted below.

Figure 72- Type of training courses offered by training institutions (TIs)¹³⁶



5.3.2 Professional courses

It is defined as the professional development as education and learning in a continuous manner in order to be updated in the latest knowledge and skills relevant to the professions or jobs.

135. TVET Journal Vol. 2 2022.pdf (ctevt.org.np).

136. Source – EY-CESLAM primary research.

At present, most of the professional programmes are managed by the private sectors in Nepal. CTEVT also conducts some professional programmes which are of 1,696 hours consisting of 164 hours of basic module, 956 hours of professional module and 576 hours of On-the-Job Training (OJT). It aims at developing skills for those who are already in jobs or searching for jobs.

There are 13 professional courses provided by CTEVT in 2022 which are Professional Welder, Professional Vehicle Body Repair Technician, Professional Plumber, Professional Motorcycle Mechanics, Professional Mason, Professional Light Vehicle Mechanic, Professional LCD, LED TV Repair Technician, Professional Cook, Professional Carpenter, Professional Building Electrician, Professional Aluminum Fabricator, Professional Telecom Technician and Professional Computer Hardware and Network Technician.¹³⁷

5.3.3 Secondary education (including Diploma Level Programme)

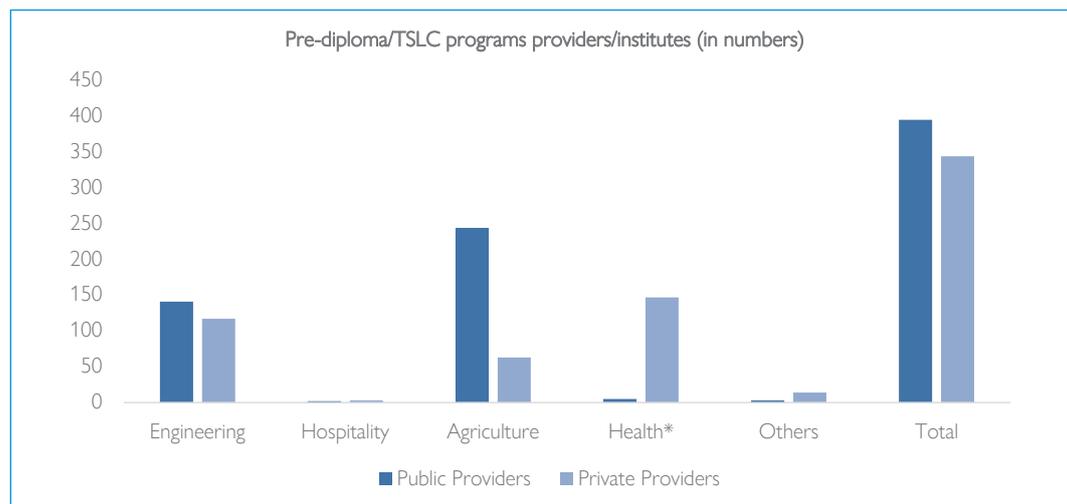
Secondary education has two purposes, first is preparing students for the higher education, and second is equipping graduates with the relevant skills and competencies to equip them to labour market. Technical secondary education consists of three (3) different programs highlighted below:

- Pre-Diploma/Technical School Leaving Certificate (TSLC) programme including apprenticeship
- Grade 9-12 programme
- Diploma Level Programme (after grade 10)

5.3.3.1 Pre-Diploma (TSLC Programme) including Apprenticeship

It aims to produce basic and middle level competent human resource and the target group are young people (after age of 13) who are not able to continue their education (especially secondary education). The present list of Pre-diploma/ TSLC programmes providers/ institutes (public and private) is highlighted below.¹³⁸

Figure 73- Pre-diploma/ TSLC programmes providers/institutes (in numbers)¹³⁹



*The health programme in pre diploma has been phased out

137. TVET Journal Vol. 2 2022.pdf (ctevt.org.np).

138. TVET Journal Vol. 2 2022.pdf (ctevt.org.np).

139. Source: TVET Journal Vol. 2-2022(CTEVT).

Majority of providers are private providers which charges fees from students. The program fees make difficult for the poor families and other logistics as indirect costs also became burden to such families.

5.3.3.2 Grade 9-12 Programme

This programme only includes five (6) different disciplines. Till now, 485 public secondary schools run these programmes and do not charge fees from the students. The total number of schools by discipline, enrolment capacity is highlighted below.¹⁴⁰

Table 19- Disciplines of training programmes offered under Grade 9-12 program

S. No.	Programmes	No. of Schools	Enrolment Capacity
1	Civil Engineering	129	24,768
2	Electrical Engineering	35	6,720
3	Computer Engineering	100	19,200
4	Plant Science	178	34,176
5	Animal Science	42	8,064
6	Music Education	1	192

Source: TVET Journal Vol. 2-2022 (CTEVT)

The objective of the programme is to expand the coverage of the programme in the remote parts of the country, thereby increasing accessibility of the targeted groups.

5.3.3.3 Diploma Level Programme

This program is secondary level equivalent programme governed by the CTEVT and is running in four (4) different types of institution. It aims to target students who are not able to continue their higher education. Four (4) different types of institutions which conduct Diploma level programmes are highlighted below.¹⁴¹

CTEVT's constituent technical institutes and polytechnic (public institutions)	Private institutions affiliated to CTEVT (Programmes are managed from the student fees) - Total share of enrolment In Diploma by the private institutions is 32.03 per cent of the total enrolment (CTEVT, 2022)
Public secondary schools (Technical Education Community Schools (TECS)) under CTEVT	Partnership modality providers under CTEVT

Source: TVET Journal Vol. 2-2022(CTEVT)

5.3.4 Technical Higher Education

It aims to produce graduates with higher level skills and competences in the areas of science and technology, information technology and technologies especially managed by the universities and academics.

140. TVET Journal Vol. 2 2022.pdf (ctevt.org.np).

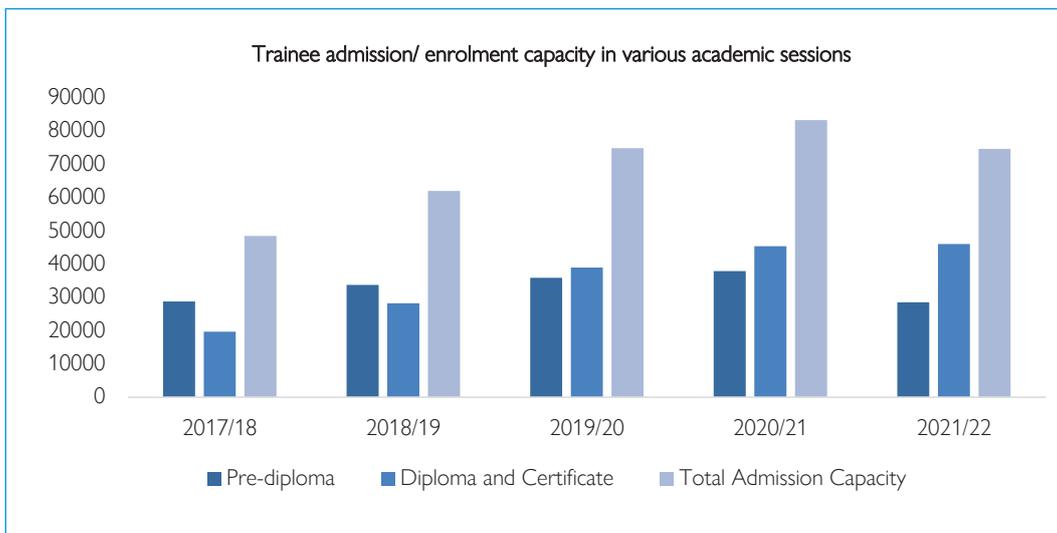
141. TVET Journal Vol. 2 2022.pdf (ctevt.org.np).

Currently, technical higher education includes the disciplines of engineering, medicine, agriculture, forestry, health profession, information technology etc. University Grants Commission (UGC, 2019/20) provides the composition of student enrolment in different disciplines of the higher education.

5.4 Enrollment Capacities in different training programmes

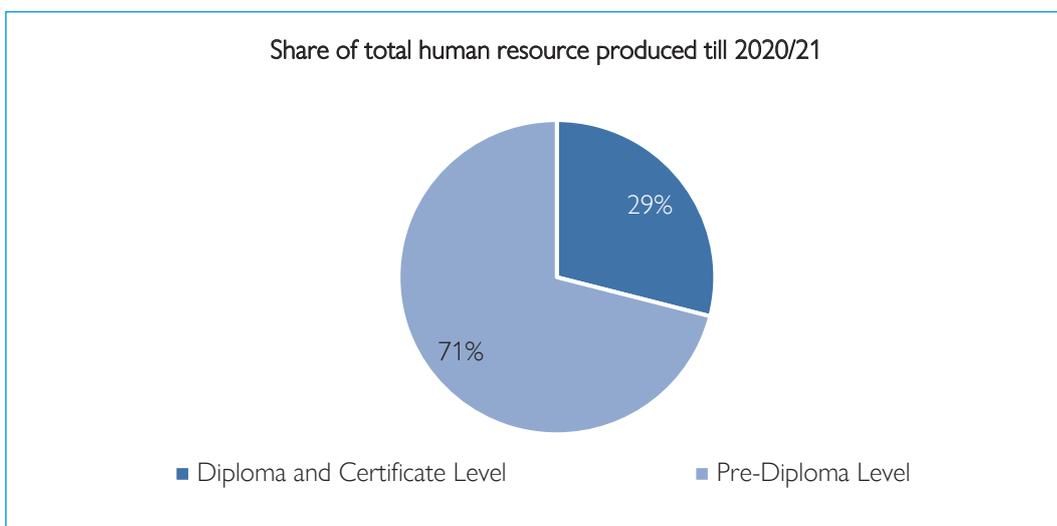
Trainee admission/enrolment capacity in past years has seen an increasing trend which shows that more people are joining training programmes for skill development. Trainee admission/enrolment capacity for the past five (5) years is highlighted below.¹⁴²

Figure 74- Trainee admission/ enrolment capacity in past academic sessions¹⁴³



While comparing enrolment of trainees in Diploma and Pre-Diploma Level, the figure below highlights the share of Diploma and Pre-Diploma Level in total human resources produced till 2020/21 in these two (2) trainings programmes.

Figure 75- Share of total human resource produced till 2020/21¹⁴⁴



142. Annual Report -20781.pdf (ctevt.org.np).

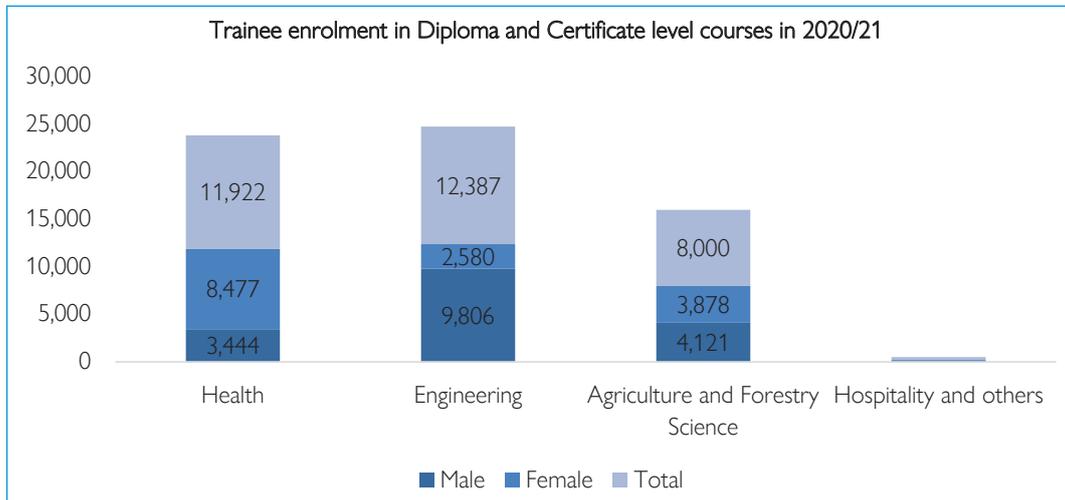
143. Source: Annual Report of CTEVT for 2077-78 – CTEVT.

144. Source: Annual Report of CTEVT for 2077-78 – CTEVT.

5.4.1 Trainee enrolment in Diploma and Certificate level courses in 2020/21

The trainees' enrolment in Engineering Diploma is the highest in 2020/21 followed by Health and Agriculture and Forestry Science with few enrolments in Hospitality and Others as highlighted below.

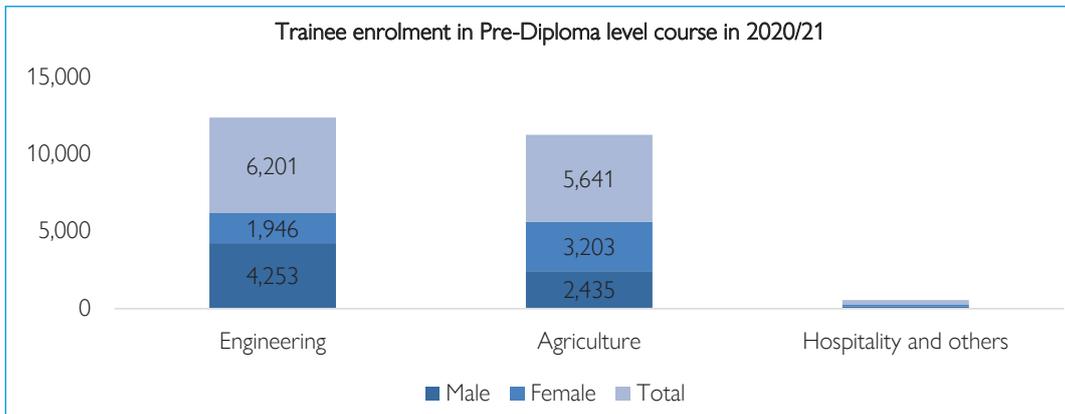
Figure 76- Trainee enrolment in Diploma and Certificate level courses in 2020/21¹⁴⁵



5.4.2 Trainee enrolment in Pre-Diploma level courses in 2020/21

The trainees' enrolment in Engineering Pre-Diploma is the highest in 2020/21 followed by Agriculture with few enrolments in Hospitality and Others as highlighted below.

Figure 77- Trainee enrolment in Pre-Diploma level course in 2020/21¹⁴⁶



5.5 Insights of survey with Training Institutions

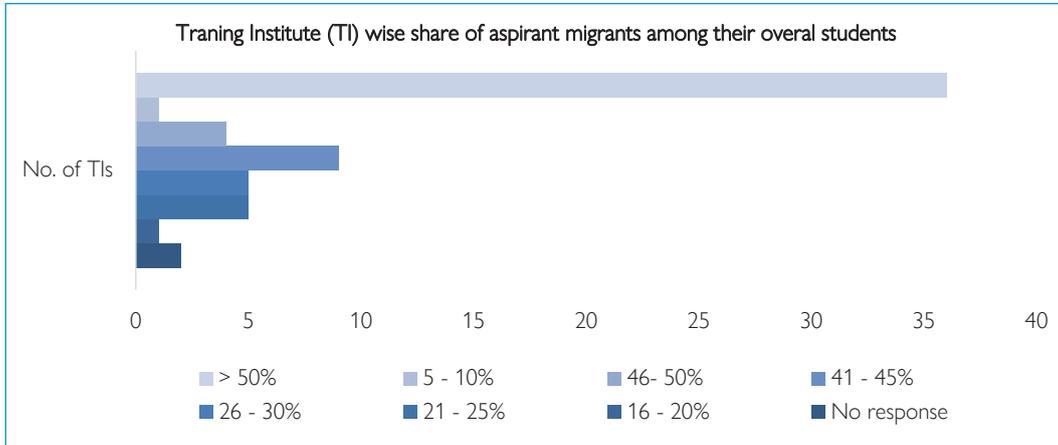
As mentioned in the starting of this chapter, primary research (survey) data is gathered via interactions conducted in Nepal by EY-CESLAM team which includes interaction with 63 training institutions providing skill training programmes.

145. Source: Annual Report of CTEVT for 2077-78 – CTEVT.

146. Source: Annual Report of CTEVT for 2077-78 – CTEVT.

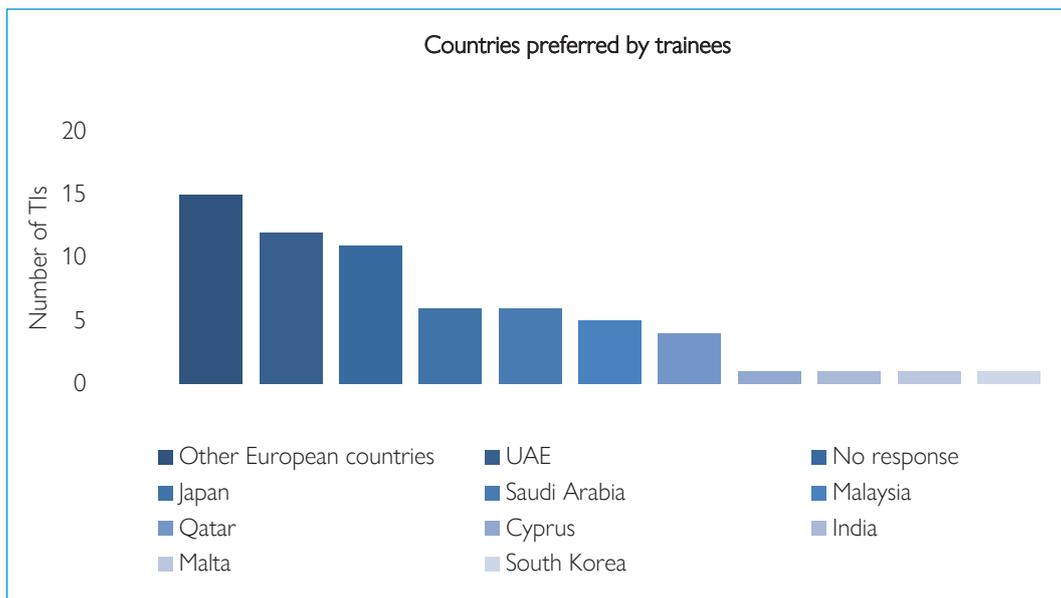
As per the survey data, training takers are mostly aspirant migrants who are ready to go to destination countries for job prospects. It is observed in maximum training institutions that the share of aspirant migrants in overall student is above 50 per cent.

Figure 78- Training Institute wise share of aspirant migrants among their overall students¹⁴⁷



As per the survey data, Aspirant migrants are eyeing for new destinations such as Japan, European countries including Cyprus, etc. as highlighted below.

Figure 79- Countries preferred by trainees as mentioned by Training Institutions (TIs)¹⁴⁸

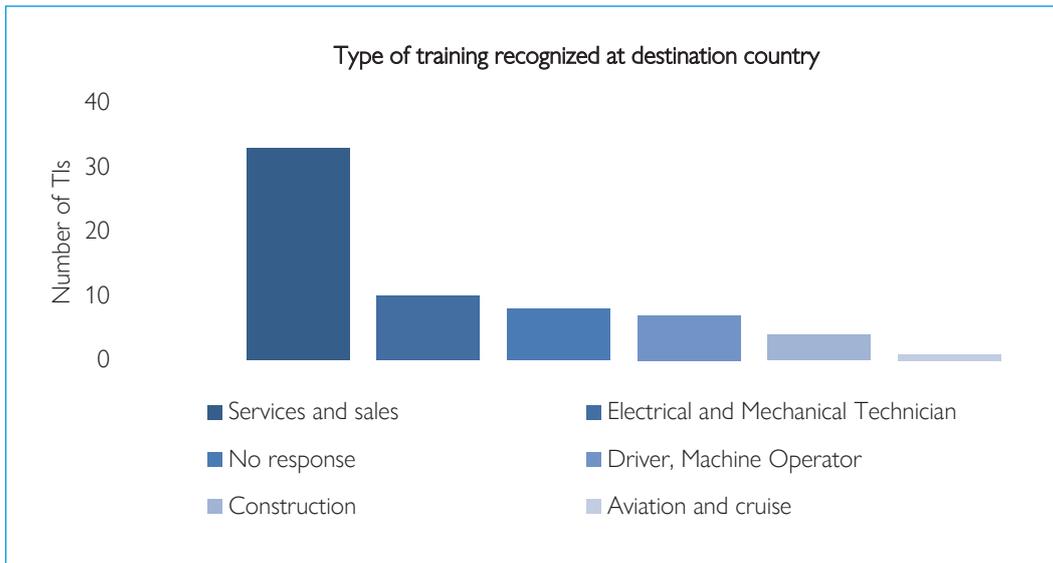


As per the survey data, training institutions based trainings are recognized by destination countries from employment perspective. Preferred trainings are in the field of services and sale, electrical and mechanical technician, and driver & machine operators as highlighted below.

147. Source – EY-CESLAM primary research.

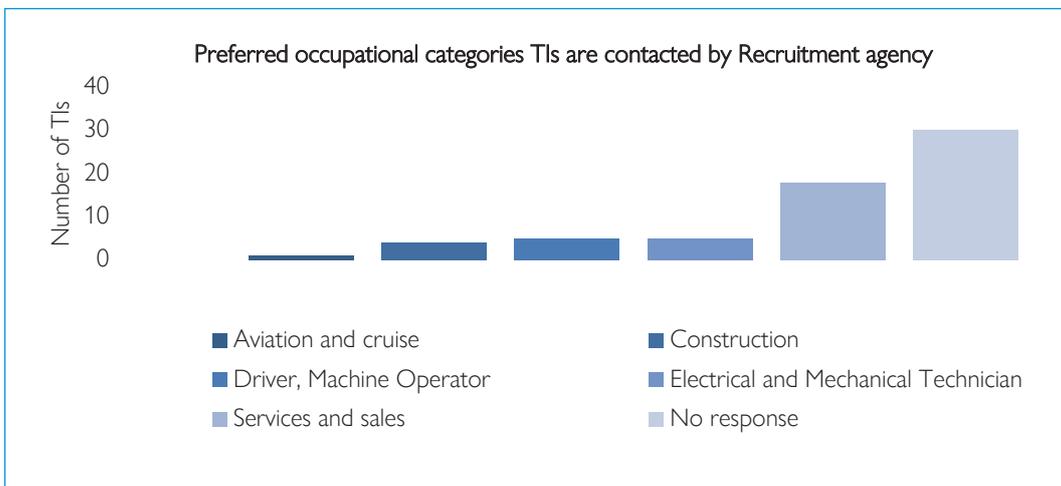
148. Source – EY-CESLAM primary research.

Figure 80- Type of training recognized at destination country as mentioned by training institutions (TIs)¹⁴⁹



Survey data indicated that occupations related to services and sales category tops the list in terms of recruitment agencies contacting training institutions as highlighted below.

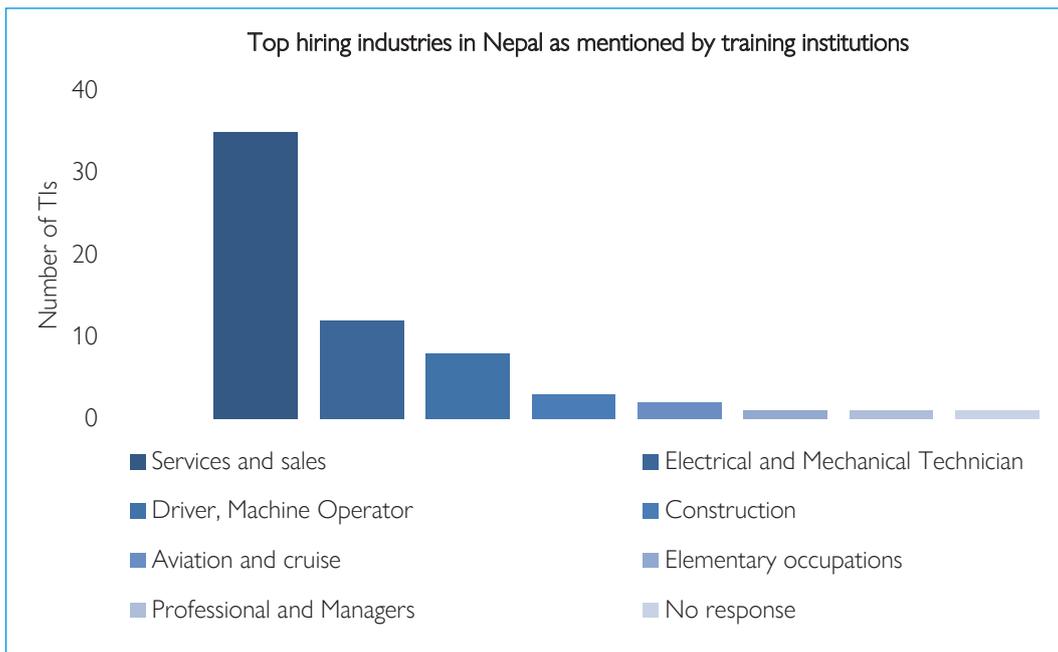
Figure 81- Preferred occupational categories TIs are contacted by Recruitment agency¹⁵⁰



As per the survey data, it is observed that training institutions (TIs) are catering to the skill needs for destination countries as well as domestic market. Around half of the TIs (i.e., 32 number of TIs out of 63) mentioned that they have tied with Nepal based employers. The top hiring industry emerged in domestic market is also service and sales followed by electrical and mechanical technician which is in line with the scenario of destination country as highlighted below.

149. Source – EY-CESLAM primary research.

150. Source – EY-CESLAM primary research.

Figure 82- Top hiring industries in Nepal as mentioned by training institutions (TIs)¹⁵¹

5.6 National Skill Testing Board (NSTB)

NSTB is an authorized institution responsible for national level skill testing and certification and works under the management of CTEVT. Some of the NSTB statistics are highlighted below.¹⁵²

Particular	Number
Accredited skill test centres	61
Skill test certification certified	4,39,744
Appeared for skill test certification	5,96,861
Applied for skill test certification	6,29,306

Source: National Skill Testing Board (NSTB), Nepal

5.6.1 Skill Test

A skill test is the corresponding performance test based on the occupational skill standard which should be demonstrated by an individual to obtain a “NATIONAL SKILL CERTIFICATE” indicating that the certificate holder meets the requirement. Skill testing offers candidates an assessment and official certification of competencies. There are four (4) levels of skill test being conducted in Nepal viz., Elementary, Level-1, Level-2, Level-3 and Level-4.¹⁵³

151. Source – EY-CESLAM primary research.

152. National Skill Testing Board/ Nepal Vocational Qualification System – Council of Technical and Vocational Studies National Skill Testing Board (nstb.org.np).

153. Skill Test – National Skill Testing Board/ Nepal Vocational Qualification System (nstb.org.np).

5.6.2 Skill Standard

A Skill Standard is a written specification of the practical skills, underlying knowledge, and experience demonstrated by an individual in a particular occupation. NSTB has prepared 311 Skill Standard which are of three categories viz., Occupational Profile (OP), Occupational Skill Standard (OSS) and National Occupational Skill Standard (NOSS) for multiple sectors as mentioned below.¹⁵⁴

Table 20- Skill Standards offered by NSTB in Nepal

Sector	Some of the Occupational Titles (out of 311 Skill Standards)
Agriculture	Agriculture Junior Technical Assistant, Coffee Plantation Worker, Community Agriculture Assistant, Dairy Technician, Fisheries Technician, Herbal Farm Worker, Junior Technical Assistant (Vegetable), Off Season Vegetable Producer, Post-Harvest Technician (Fruits and Vegetables), Tea Plantation Worker
Automobile	Heavy Vehicle Electrical Mechanic, Heavy Vehicle Mechanic, Light Vehicle Engine and Service Mechanic, Motorcycle Mechanic
Business	Receptionist, Enterprise Development Officer and Facilitator, Salesperson
Computer	Computer Operator and Programmer, Computer Hardware Technician, Computer Repair & Maintenance Technician, Computer Network Technician
Construction	Building Painter, Brick Layer Mason, Carpentry and Interior Decorator, Construction Carpenter, Drafting Technician, Furniture Maker, Plumber, Pipe Fitter, Stone Layer Mason
Construction Equipment	Bulldozer Operator, Crane Operator, Heavy Equipment Electrician and Mechanic, Road Roller Operator
Electrical	Building Electrician, Electrical Appliances Repairer Technician, Electrical Lineman, Electrical Motor Repairer, Energy Auditor, Industrial Electrician, Micro Hydro Assistant
Electronics	Cell/Mobile Phone Repair Technician, LCD/LED Television Repair Technician, Telecom Technician
Forestry	Community Forestry Facilitator, Wildlife Technician, Zookeeper
Handicraft	Bamboo Furniture Maker, Metal Sculpture, Repousse (Metal Sheet Embosser)
Health	Complementary Health Assistant, Eye Health worker, Lab Assistant, Physiotherapy, Model Health Worker
Hospitality Industry	Baker, Barista (Coffee Maker), Bartender, Commis-I, II and III, Continental Cook, Homestay Operator, Sweets & Snacks Maker, Waiter
Leather Goods & Industry	Shoemaker, Assistant Leather Goods Technician
Mechanical	Aluminium Fabricator, Boiler Operator, Lathe Setter Operator, Milling Machine Setter Operator, Production Foreman, Cement Plant, Refrigeration & Air-conditioning Technician, Structural Fabricator
Mountaineering	Aspirant Guide, Mountain Guide
Printing	Book Binding Technician, Printing Technician
Renewable Energy	Micro Hydro Operator, Biogas Technician, Micro Hydropower Installer (Civil and Electro-Mechanical), Solar Electric Technician, Repair and Maintenance
Tailoring/ Garment	Garment Fabricator, Hand Embroiderer, Tailor, Woollen Knitting Machine Operator
Textile	Carpet Weave, Pashmina Weaver, Thread Spinner
Yoga	Yogarthi
Others	Studio Photographer, Library Assistant, Security Guard, Security Head Guard

Source: National Skill Testing Board (NSTB), Nepal

Most of the Skill standards for the skill certification test are in lower skill category and conventional type occupations. There is a gap between new technological adoption in different occupational profiles and the skill standards of Nepal based on which Nepalese people are certified. Taking it to the next step, Nepal may think in the direction of establishing new training programmes and skill standards aligning with worldwide sector wise technological adoptions.

5.7 National Vocational Qualifications Framework (NVQF)

Nepal Vocational Qualifications System (NVQS) is envisioned a long-term project, focused on bringing about systemic changes in the Technical and Vocational Education and Training (TVET) system in Nepal.

Swiss Agency for Development and Cooperation (SDC) is supporting the MoEST to establish a National Vocational Qualifications Framework (NVQF) and a corresponding National Vocational Qualification Authority (NVQA) to manage it through NVQS Project. MoEST is the institutional partner and CTEVT/ NSTB is the direct implementation partner until it will be transformed into a NVQA under its own legal umbrella. Swiss Foundation for Technical Cooperation (Swisscontact) is providing Technical Assistance to the Project.¹⁵⁵

NVQS Phase II (2020-2024) is the continuum of the first phase (2015-2019) of the project which has made some achievements by supporting the government such as the refinement, wider consensus, and finally approval of the National Vocational Qualifications Framework (NVQF) from the Cabinet.¹⁵⁶

The below image is the latest version of NVQF integrated with General Education Qualifications Framework (GEQF) for Nepal. It presents the basis for a formalized structure of vocational and general education learning levels. Basically, NVQF is a fundamental subcomponent of the National Qualifications Framework (NQF) and it is an updated version of NQF. The implementation of the NQF in Nepal was approved by the Cabinet on 3 May 2020.

Implementation of the NVQF will help to organize and classify all technical and vocational qualifications according to predefined levels of knowledge, skill, and attitude and Nepal will move towards a formalized skills qualification system.¹⁵⁸

154. OP/OSS – National Skill Testing Board/ Nepal Vocational Qualification System (nstab.org.np).

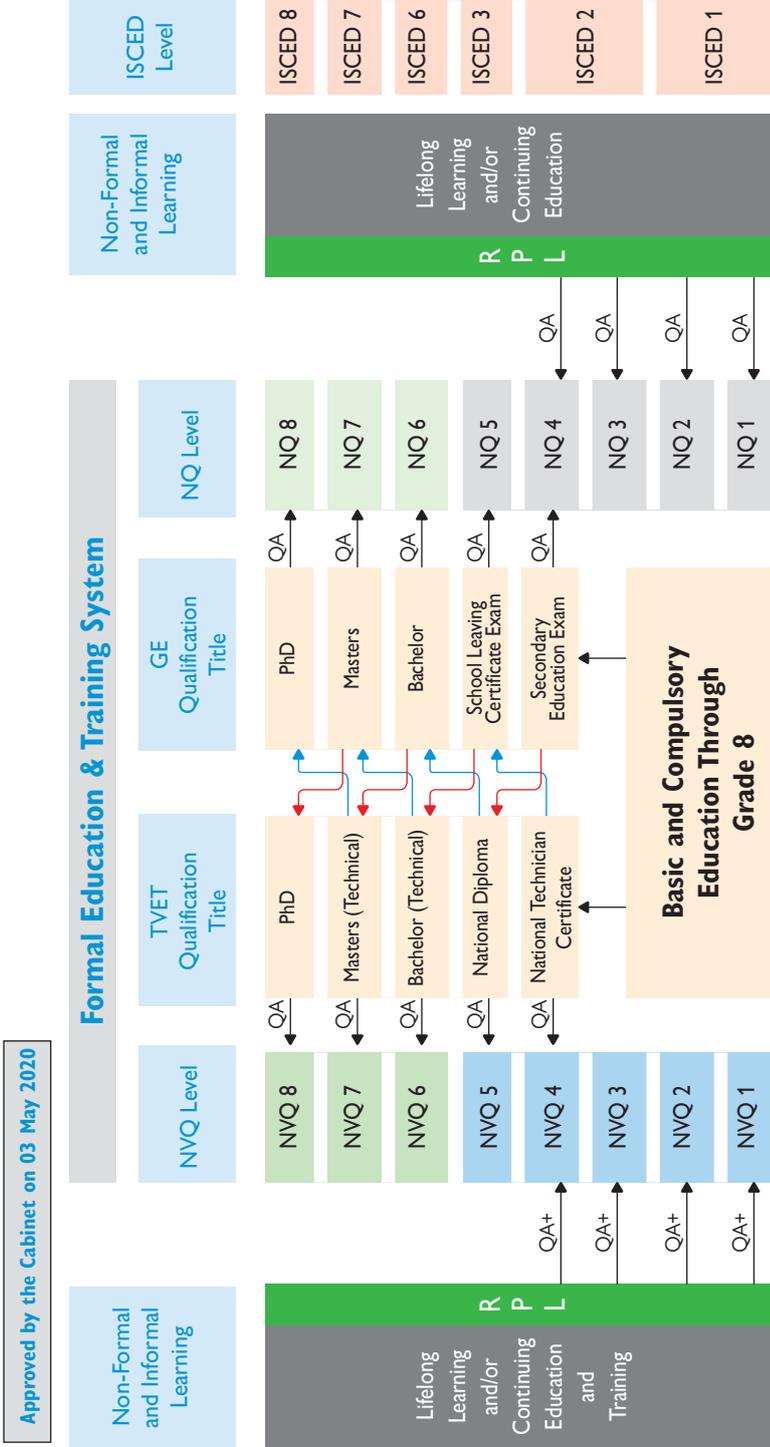
155. NVQS (ctevt.org.np).

156. NVQS – Projects – Site (swisscontact.org).

157. Image Source: Swisscontact Technical Assistance Provider to the Project.

158. Government of Nepal approves the implementation of the National Qualifications Framework - News - Site (swisscontact.org).

Figure 83- National Vocational Qualifications Framework (NVQF) approved by cabinet
National Qualifications Framework (NQF) Nepal – Main Frame



TVET: Technical and Vocational Education and Training

(+): Indicates additional technological and practical components as required for each level of NVQF
 QA: Qualification Assessed as per the set criteria by National Qualifications Authority (NQA)

GE: General Education

RPL: Recognition of Prior Learning

ISCED: International Standard Classification of Education



CHAPTER 6

NEPAL RECRUITMENT PROCESS

6 Context

India has a cross-border connection with Nepal and hence migration between these two countries is free and even tracing it is difficult. Except India, Nepali workers migrate to foreign countries through independently or through facilitation by **Private Recruitment Agencies (PRAs)**. Such PRAs are locally known as “manpower companies”.

Labour approvals can be processed through either of the below three mechanisms –

- Individual processing
- Through government agencies
- Through PRAs

In 2018/19, ~2,00,000 labour permits issued by DoFE were processed through PRAs which is equivalent to 9/10th of total new labour permits issued. PRAs provide extended support in terms of completing necessary paperwork and acquiring labour permits, visas, and air travel tickets.

But PRAs have negligible role in migration to countries like Republic of Korea and Israel which have government to government modality. Republic of Korea has a fixed workers entry system under Employment Permit System (EPS). Barring selected country, PRAs has a significant role in migration.

6.1 Policy framework

There are two primary laws to govern foreign labour migration - the Foreign Employment Act (FEA), 2007, and its subsequent rules, Foreign Employment Rules (FER), 2008. The overarching goals of foreign labour migration are contained in the Foreign Employment Policy, 2012.

The key legislations governing labour migration from Nepal are shown below.¹⁵⁹

Table 21- Legislation governing labour migration in Nepal

Primary legislation	<ul style="list-style-type: none"> a) Foreign Employment Act, 2007 b) Foreign Employment Rules, 2008 c) Foreign Employment Tribunal Rules, 2011 d) Foreign Employment Policy, 2012
Subordinate legislation	<ul style="list-style-type: none"> a) Legal representation for foreign employment, 2019 b) Directives for monitoring team, 2019 c) Skills training procedure, 2019 d) Guideline on Foreign Employment Demand Attestation, 2018 e) Procedure on the monitoring of recruitment agencies and training institution, 2017 f) Directive on Sending Domestic Workers for Foreign Employment, 2015 g) Manual on the Registration and Renewal of Orientation Training Institutions, 2014 h) Standard on the Enlisting Process of the Health Examination, 2013 i) Directive on the Procedure on Individual Labour Permits, 2013

¹⁵⁹. ILO report titled “Recruitment of migrant workers from Nepal: Country profile”.

6.2 Actors involved

There are many actors involved in the process of recruitment which is largely led by private players of destination countries.

- **Private Recruitment Agencies (PRAs)** or Recruitment Agencies (Ras) play an intermediary role between foreign employer and Nepalese workers. They facilitate in job search and documentation work.
- **Orientation centres** provide information on foreign employment process, legal provisions, travel information and other safety measures.
- **Medical centres** conduct medical tests and furnish health certificates.
- **Insurance companies** cater to mandatory term life insurance needs.
- **Banks and financial institutions (BFIs)** help in migration related cost and payment.
- **Skill development centres** help in skilling.

Table 22- Actors' statistics involved in migration recruitment process in Nepal

Actors	Numbers
Active RAs	864
Active Orientation centres	148
Medical centres	226
Insurance companies	14
Banks	23

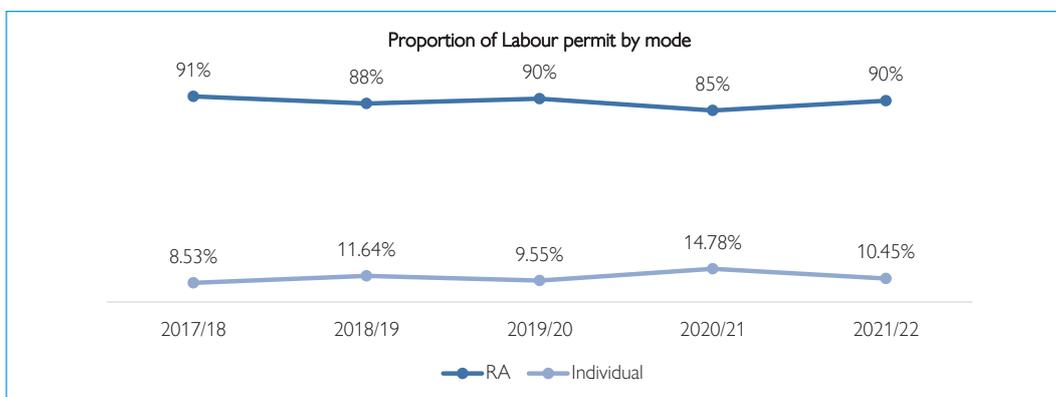
6.3 Role of PRAs

PRAs refers to institutions established under the prevailing **Company Act of Nepal** and have acquired a license to conduct a foreign employment business that recruits workers for advertised jobs in other countries (Ministry of Labour and Employment 2016).¹⁶⁰

Nepali PRAs are required to register at the Company Registrar's Office and obtain a licence from the DoFE to operate their business. Currently, there are **864 active PRAs** as per DoFE website.¹⁶¹ PRAs are mostly concentrated in big cities like Kathmandu and hence are dependent upon informal labour intermediaries.

PRAs provide extended support in terms of completing necessary paperwork and acquiring labour permits, visas, and air travel tickets. Hence, they are the preferred mode for labour migration as shown in the graph below.

Figure 84- Proportion of labour permit by mode (Through RA and individually)¹⁶²



160. IDS study titled "Assessment of Outreach and Engagement with Prospective Migrants by the Agencies Recruiting Labourers for Foreign Employment" (May 2022).

161. <https://dofe.gov.np/Recruiting-Agences.aspx>.

162. IOM report titled "Migration in Nepal: A country profile 2019".

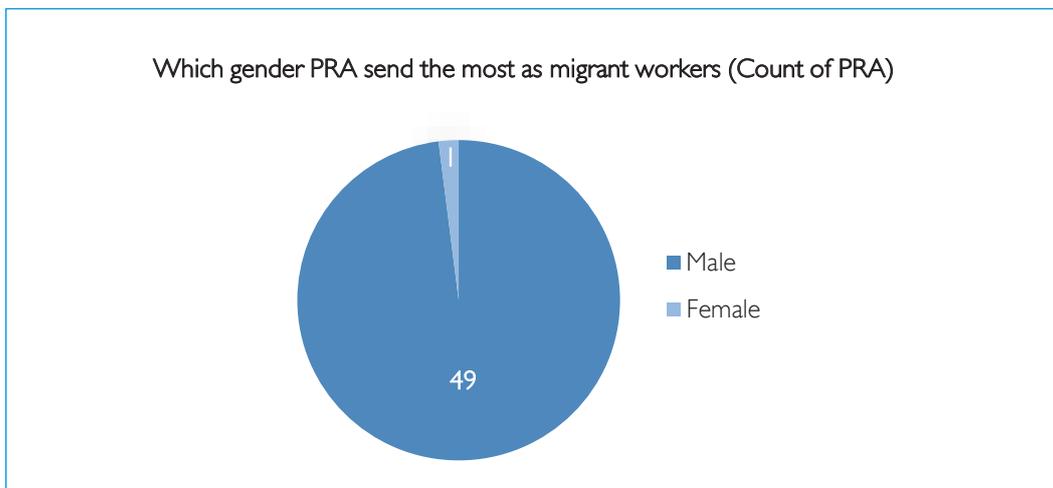
6.4 Current scenario of RAs in Nepal

To gauge the existing scenario of RAs in Nepal, we conducted primary research level interaction with 50 PRAs hailing from Bagmati province and Kathmandu area. The key insight emerging from it are detailed below.

6.4.1 Gender perspective

Out of 50, 49 PRAs shared that male migrant dominates in terms of migrating to destination countries.

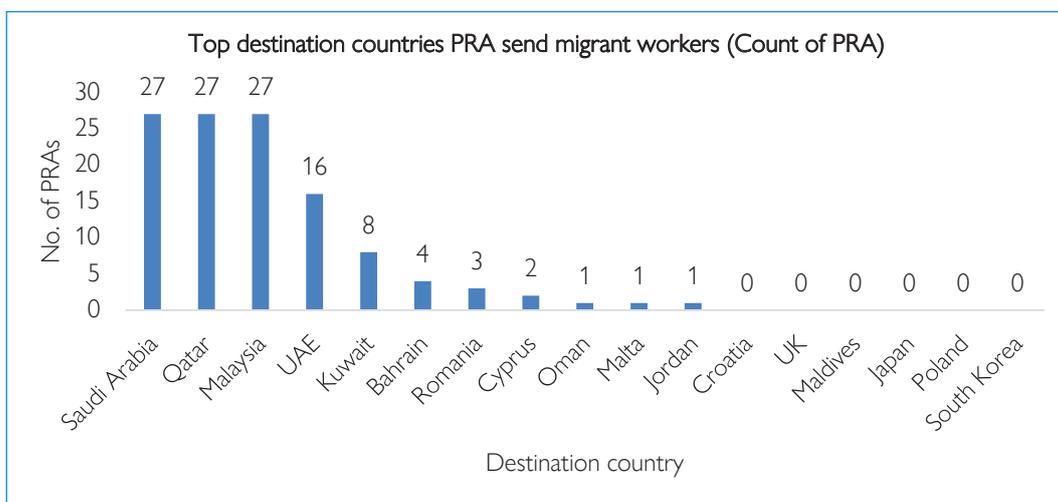
Figure 85- Gender-wise share in migrants going to destination countries by PRAs¹⁶³



6.4.2 Destination country perspective

The traditional countries like Saudi Arabia, Qatar, Malaysia, and UAE are still prevailing in terms of top three countries where PRAs send the migrants to. It also calls for diversification of destination country by PRAs. It can be seen from the graph below that around half of interviewed PRAs top countries were Saudi Arabia, Qatar and Malaysia.

Figure 86- Destination countries where PRAs send migrants¹⁶⁴



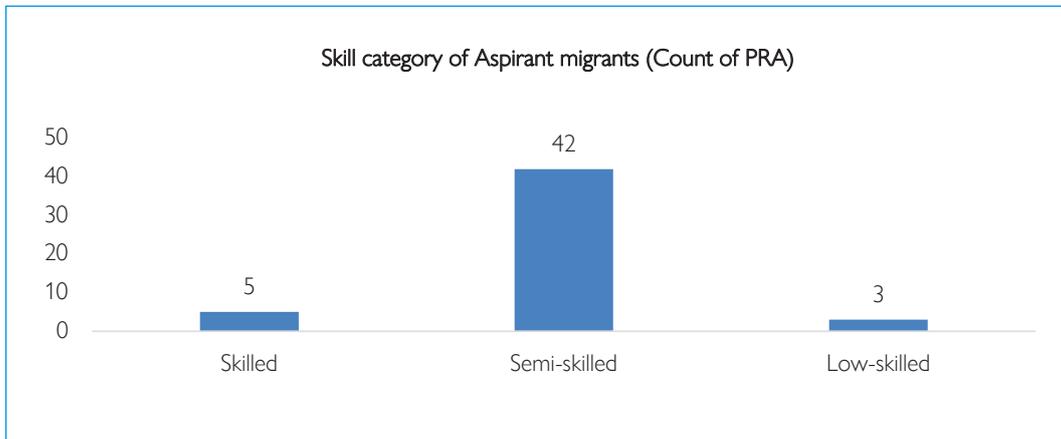
163. DOFE website (Total Labour approval without re-entry).

164. Source – EY-CESLAM primary research.

6.4.3 Skill level perspective

Semi-skilled category is the dominant type of migrants approaching PRAs and going to destination countries. There seems a shift from low skilled to semi-skilled.

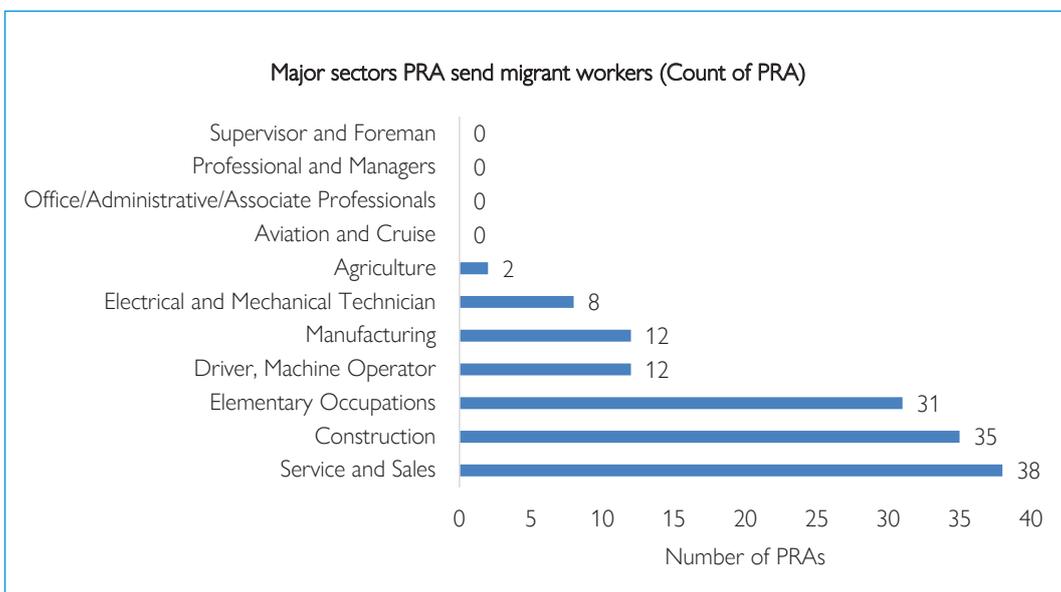
Figure 87- Skill category of aspirant migrants¹⁶⁵



6.4.4 Sector perspective

The trend in the below three figures shows that **Service and Sales, Elementary Occupations and Construction** are the top 3 sectors which PRAs receive most demand and send migrant workers to destination countries. It is followed by Manufacturing, and Driver and Machine Operator.

Figure 88- Sector preference of migrants¹⁶⁶



165. Source – EY-CESLAM primary research.

166. Source – EY-CESLAM primary research.

Figure 89- Sector preference of last year of migrants¹⁶⁷

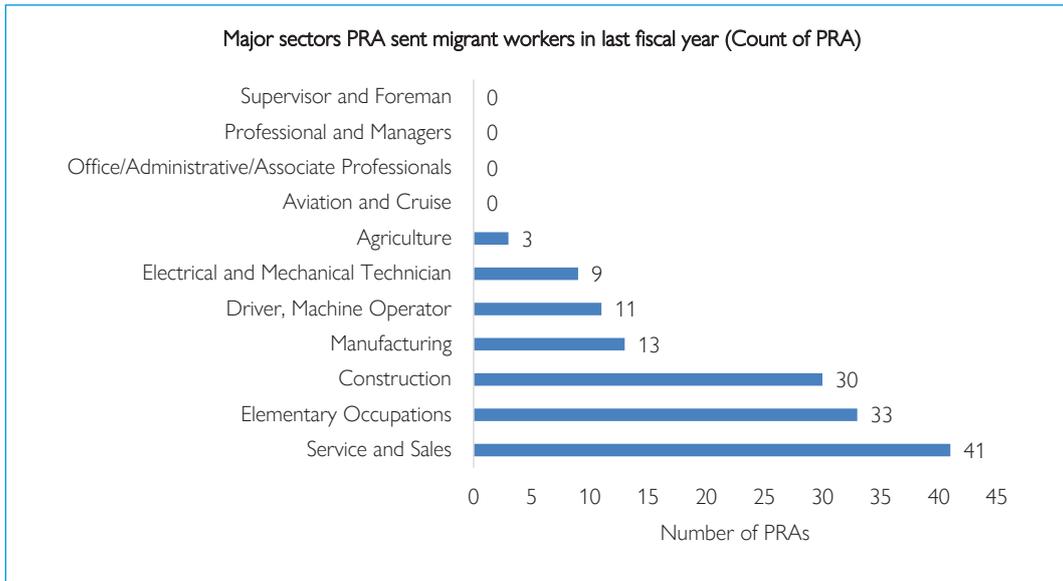
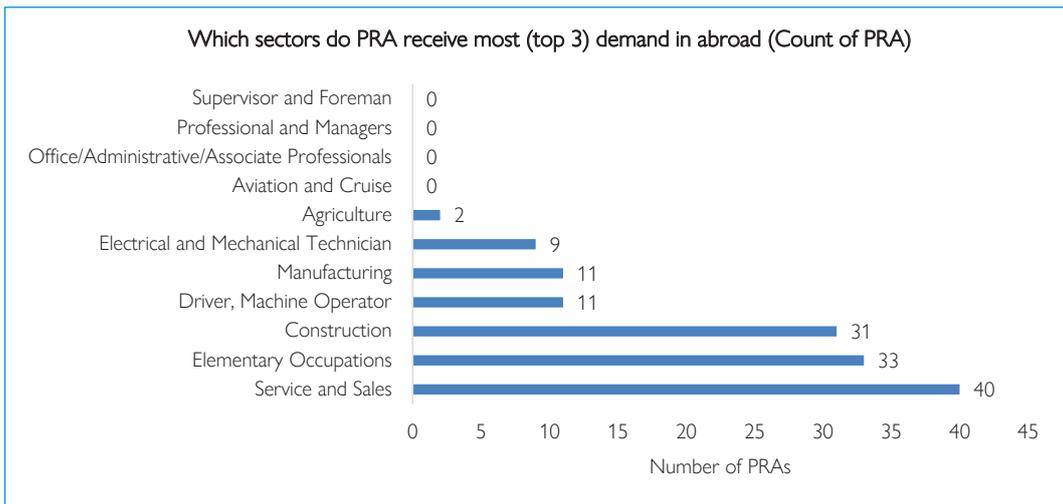


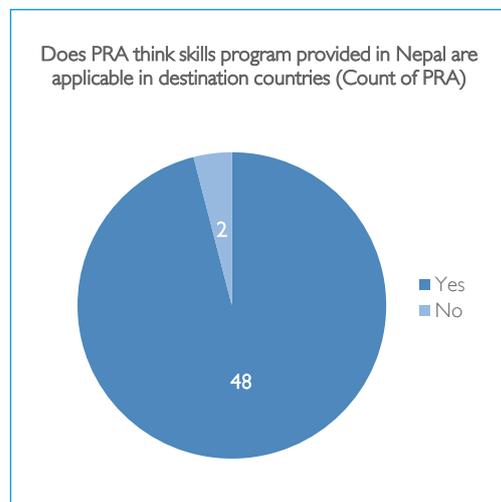
Figure 90- Demand sector from abroad¹⁶⁸



6.4.5 Skill certification perspective

It is reflected that skill programmes have a relevance. In interaction with PRAs, majority of them mentioned that Nepal skill programmes are applicable and considered in destination countries.

Figure 91- Skill programme applicability in destination country¹⁶⁹



167. Source – EY-CESLAM primary research.
 168. Source – EY-CESLAM primary research.
 169. Source – EY-CESLAM primary research.

The primary interaction shows that Service and Sales is the prevalent sector which requires skill training certification or skills training testing certificate followed by construction.

Figure 92- Sectors requiring skill training certificate by employers¹⁷⁰

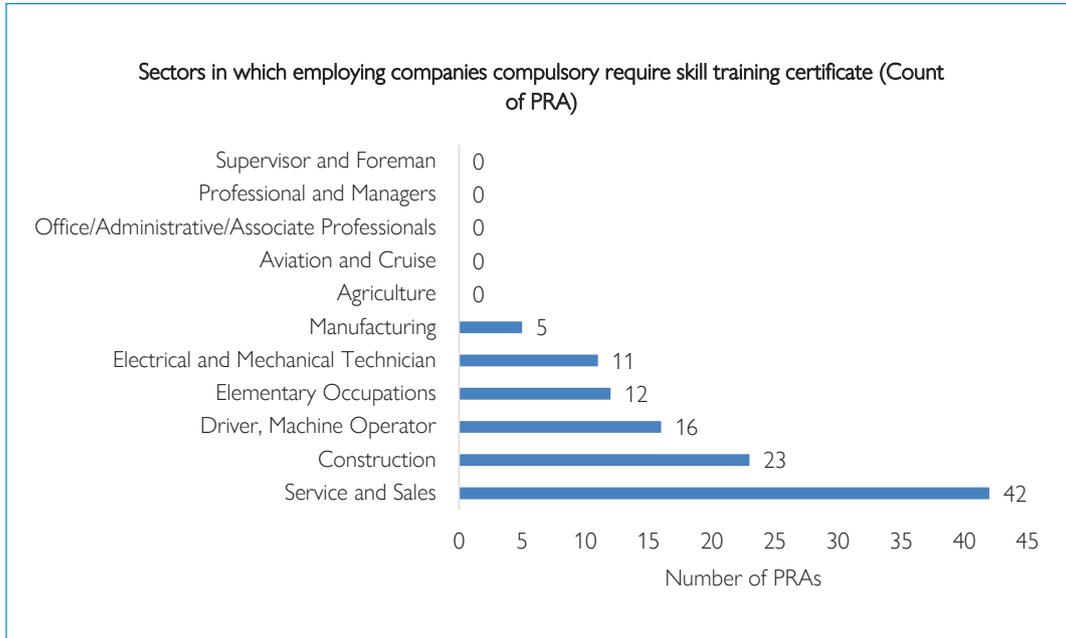
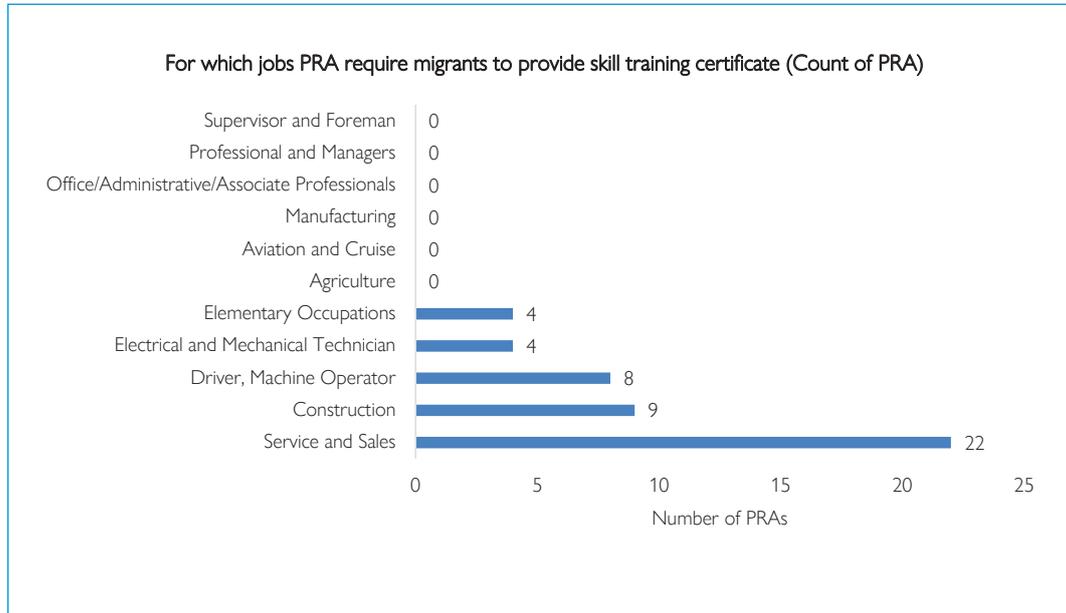


Figure 93- Sectors requiring skill training certificate by PRAs¹⁷¹



6.5 Recruitment process

There can be two branches for recruitment – domestic and foreign recruitment. These are detailed in the further section.

170. Source – EY-CESLAM primary research.

171. Source – EY-CESLAM primary research.

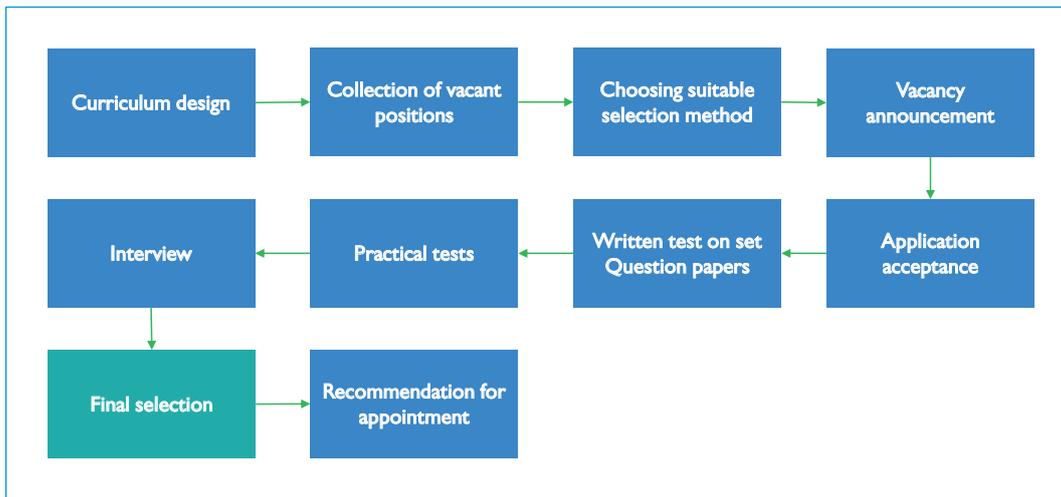
6.5.1 Domestic country recruitment

There is no distinct arrangement for this. It happens through direct and educational institutions-based mode only.

a) Public sector

In the public sector, following steps are followed for recruitment¹⁷²

Figure 94- Selection by public companies in Nepal¹⁷³



Public Service Commission (PSC) is the constitutional hiring agency. It recommends selection for government services. Its methodology is shown in the above figure. Even other mode like personal networks, advertisements and internal promotion is adopted from time to time.

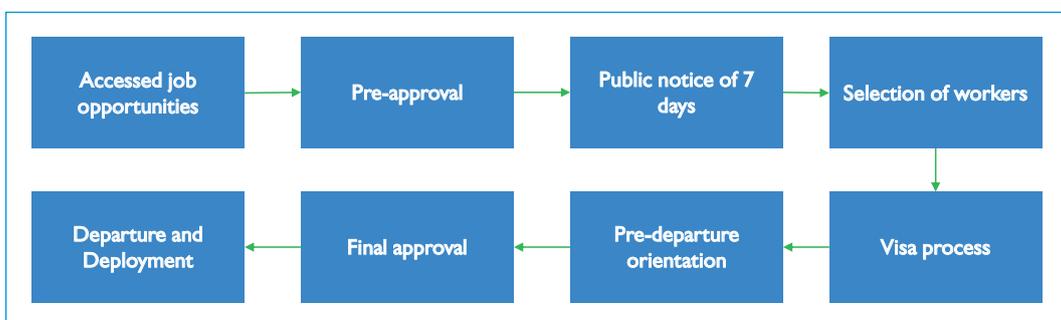
b) Private sector

There is not much research and information content available on this front.

6.5.2 Foreign (destination) country recruitment

The recruitment process is governed by the Foreign Employment Act (2007) and subsequent Foreign Employment Rules (2008). These have outlined the processes of labour recruitment for overseas employment. The brief and detailed process is outlined below.

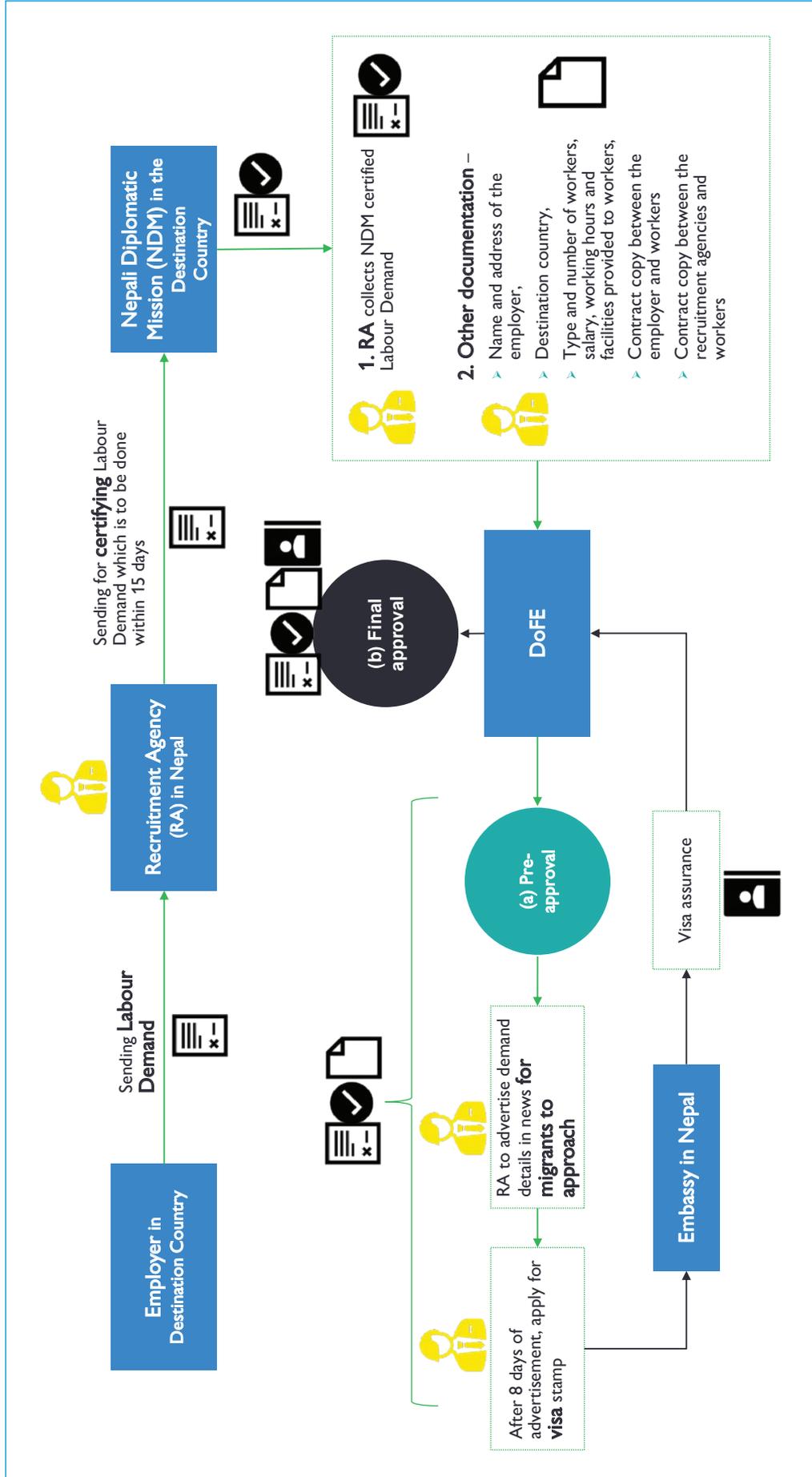
Figure 95- Foreign recruitment process in brief



172. https://www.researchgate.net/publication/350474038_Methods_of_Employee_Selection_in_Nepalese_Organizations_Based_on_Internet_Technology_A_Qualitative_Inquiry.

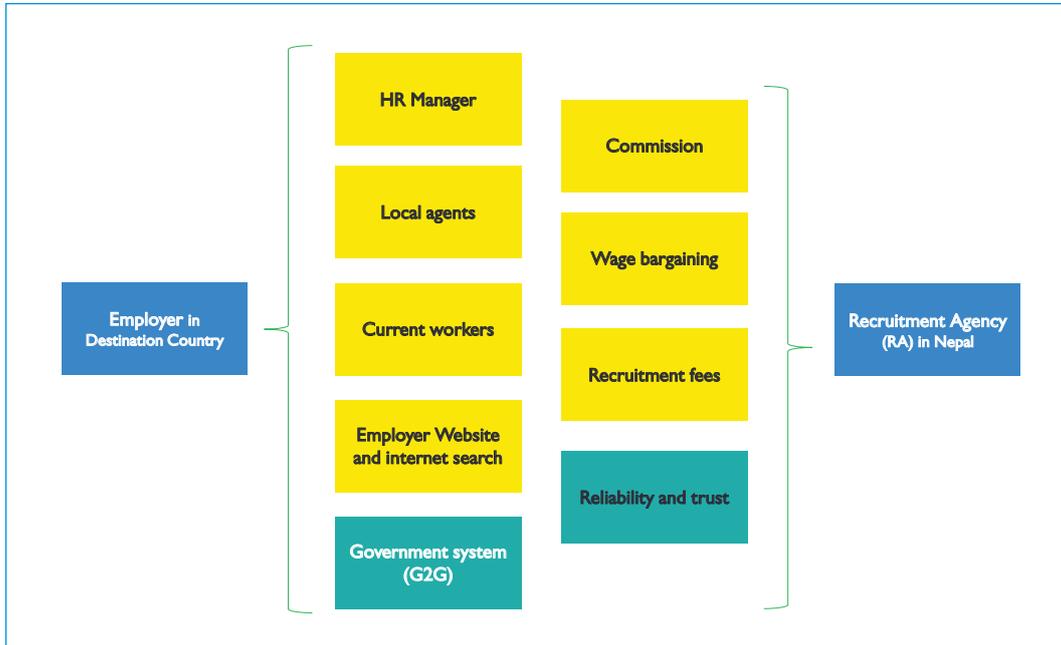
173. https://www.researchgate.net/publication/310951113_Study_Report_on_Migrant_Workers'_Recruitment.

Figure 96- Labour demand procurement, demand verification and pre-approval process



There are elements between the first step i.e., between employer and PRA as shown in above figure. It is shown below.

Figure 97- Elements between employer in destination and PRAs



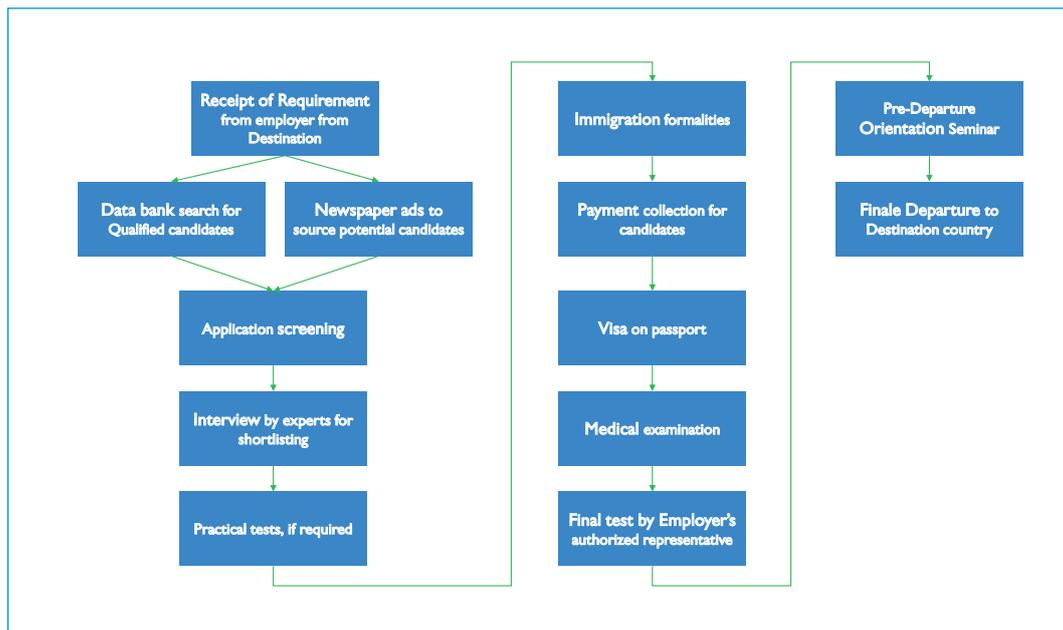
The above figure shows the first step as employer of destination country to approach PRAs but interview with PRAs shows that generally Nepali PRAs approach prospective employers with the help of other recruitment agencies or agents in the destination countries. It is a rare occurrence that employers themselves approach PRAs.

PRAs identify labour demand through channels like online vacancy announcements in the company's websites, personal visits to the employers, and recruitment agencies in the destination countries. PRAs directly approach through email writing to potential employers. They even pay frequent visit to destination country to build networks with employers.

Sometime employer also adopts **internal hiring** based on referral of existing staff members or they also **auction** contract to the recruitment agencies that can supply the cheapest labour.

As per law, it states that PRAs can advertise the labour demand in newspapers for aggregating interest from migrants. But this is not an effective mode. Consequently, recruitment agencies use multiple channels such as social media posts; FM/radio advertisements; group short message services (SMS text messages) to potential worker groups; PRA databases of prospective workers; use of outreach and marketing officers (separate staff members); walk-in clients; agents; campaigns in villages or places where potential workers can be brought in from; and referrals or recommendations from past workers.

For clarity, recruitment process as adopted by one of the PRAs "Naukri Nepal Private Ltd." is shown.

Figure 98- Recruitment steps of a typical PRA¹⁷⁴

6.6 Procedure for job matching

The job matching is done in the initial stages of recruitment steps as shown above. The steps followed are –

- Destination country employer send their requirement (or Labour Demand).
- RA tap their internal sources (data bank) for potential candidates.
- RA in parallel also post newspaper ads to source potential candidates.
- The various applications received (through internal data bank and through external ads) are then screened.
- An expert panel conduct interviews of the screened candidates to check for match between skills and job requirement.
- A practical test is being conducted in case required.

6.7 Impact of COVID-19 on RAs

As per IOM, there were three major challenges faced by RAs because of COVID-19 pandemic. These are –

6.7.1 Delays or postponement of recruitment and deployment processes

Due to physical restrictions, border closures, international travel restrictions or bans, it resulted into hampering of work of RAs such as handling workers' visa issuance and contracting processes, organizing pre-departure orientation, and obtaining medical clearances.

In Nepal, GoN ceased labour permit issuance. Even countries like Thailand ceased approval of applications from Thai employers to recruit migrant workers.

174. <http://www.naukrinepal.com/how-it-works/>.

6.7.2 Cancellation and decline in job orders from employers

COVID-19 pandemic resulted in mixed trend in the demand of products. The need of usual raw materials decreased but demand of rubber gloves manufactured in Malaysia, the healthcare sector in Gulf Cooperation Council (GCC) countries and for canned product manufacturers in Thailand increased. Still, some employers preferred to “wait and see” resulting in stagnation in job opportunities.

6.7.3 Increasing financial burden on the recruitment agencies

There is an increased cost burden on RAs due to the provisioning for support to stranded or returned migrant workers. For Nepal RAs, flights cancellation and non-refundable tickets were a concern.

RAs were not adequately prepared for a protracted global pandemic crisis. They were lacking emergency plans and strategies. Their communication link with migrants, employers and other business partners in destination countries was weak.

RAs tried to assist migrant workers in mitigating COVID-19 pandemic related challenges being faced. The disseminate information and negotiate with employers to respect employment conditions and labour rights during pandemic and to maintain the job as far as possible.¹⁷⁵

6.8 Gaps

There are various gaps in the whole system of recruitment, especially by PRAs.

6.8.1 Higher recruitment fees

Government of Nepal has formulated “free-visa, free ticket” policy for seven destination countries i.e., Saudi Arabia, Kuwait, UAE, Qatar, Oman, Bahrain, and Malaysia. It advocates for “no recruitment fee” principle. It aims to shift cost burden from workers to the employer.

The labour agreements signed by the GoN with Malaysia and the UAE included the provision to hold employers responsible for covering all recruitment costs and fees, to reduce migration cost. It is also stated in the few of MoUs signed with respective countries. For example, following is the relevant clause under **Article 5 clause 13 from MoU of Nepal with UAE** which states that –

“Within its jurisdictions, the second party will ensure that the Worker does not have to pay any recruitment related costs and fees. Employers will bear all the costs related to recruitment, employment and the residency of Nepali worker in the UAE including but limited to recruitment agency fees, air ticket costs, insurance fees, visa fees, medical examination fees and all other recruitment related costs and fees.”¹⁷⁶

There was no similar clause found in MoU signed with Bahrain.¹⁷⁷

175. IOM report titled “Labour Recruiter Rapid Assessment - Upholding the rights of migrant workers during COVID-19”.

176. MoU between GoN and Government of UAE in the recruitment, employment and repatriation of workers dated 14 June 2019.

177. <https://www.ceslam.org/governance/bilateral-arrangements>

It could not be implemented because of–

- Complex monitoring of the transaction value between the worker and the recruitment agency.
- Failure to maintain actual receipts showing the actual recruitment fees taken by PRAs from migrants and instead providing forged receipts with the authorized charge of NPR 10,000 (maximum allowed recruitment fees but put up incorrectly).
- PRAs using a chain of intermediaries in the destination country for labour demand procurement which increased the transaction cost of migration.

Hence, it can be seen that GoN has established Foreign Employment Welfare Fund as per The Foreign Employment Act (2007). The policy support is there but government monitoring of its implementation is weak. Hence, it requires an effective establishment of monitoring cell at central and provincial level.

6.8.2 Human rights violation

Workers face abuse in the form of low wages, unsafe working environments, a virtual absence of social protection, a denial of freedom of association - especially as it relates to the right to form trade unions and other workers' rights – discrimination, xenophobia and other indignities.

Even pre-departure exploitation exists through misrepresentation of the nature and terms of work available, excessive recruitment fees, the delay or cancellation of departures, and a failure to provide workers with the correct pre-departure documents, including receipts and contracts of employment and recruitment.

PRAs are involved hugely in the intermediary documentation stage, but inefficiencies are there.

6.8.3 Lack of protection in bilateral agreements

The Government of Nepal (GoN) has signed a number of Bilateral Labour Agreements (BLAs) and Memorandum of Understanding (MoUs) with destination countries. Regulation of FEA also provides for –

- the appointment of a labour attaché in a country with more than 5,000 workers in order to protect the labour and human rights of migrant workers in the destination countries (section 68).
- appointment of a woman labour attaché in a country where 1,000 or more women migrant workers have been sent for foreign employment (Rule 43(1))

But GoN has appointed attaché in 8 countries only.

6.8.4 Challenge from policy provisions

Under 'free visa, free ticket' policy, PRAs are allowed to charge each worker a recruitment fee up to a maximum of NPR 10,000 (US\$84) for certain destination countries. With amendments, GoN increased the amount of cash deposits and bank guarantees to be provided by PRAs to the DoFE. It was done to provide funds for the government to rescue and repatriate migrant workers, as well as to compensate workers stranded in foreign countries if the PRAs had deceptively recruited and deployed the workers.¹⁷⁸

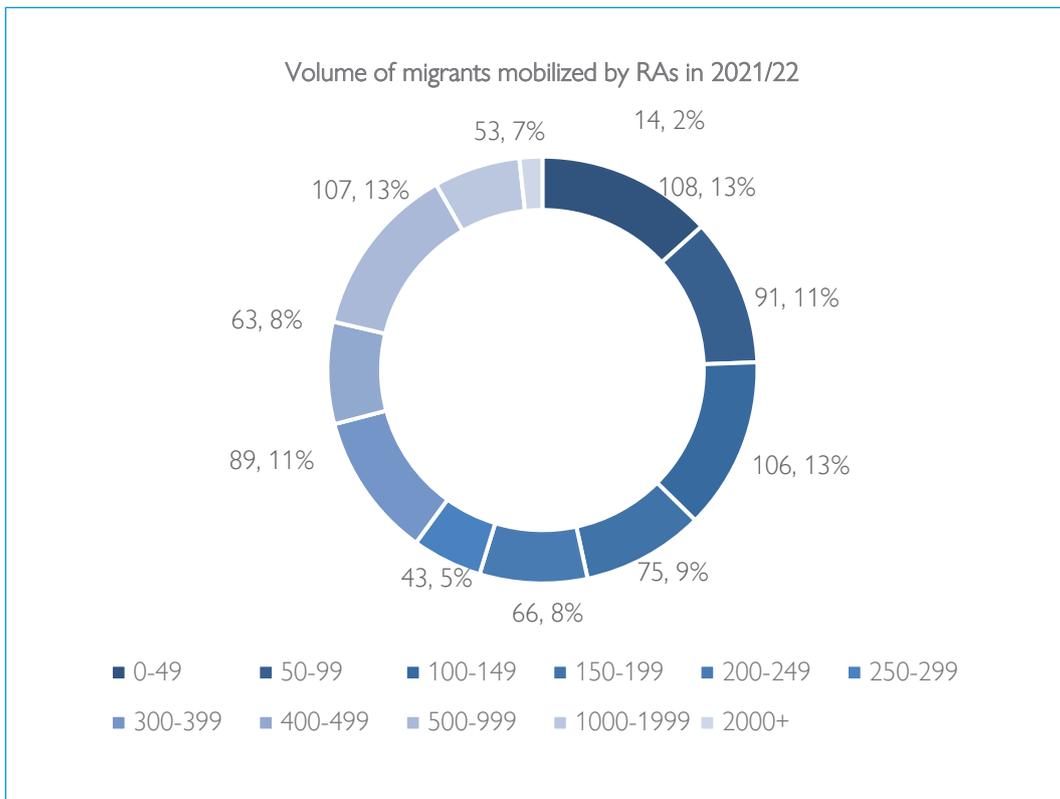
178. IDS report titled "Assessment of Outreach and Engagement with Prospective Migrants by The Agencies Recruiting Labourers for Foreign Employment".

But with capping of NPR 10,000 along with cash deposit and bank guarantee, managing expenses is cumbersome. Such expenses include frequent visits to the destination countries, a deposit of a large sum to run their business, payment to intermediaries involved in worker recruitment, and possible payments to recruitment agencies and human resource officials of employer companies while procuring labour demand from employers abroad.

6.8.5 Excessive number of PRAs distorting market growth

As per FEIMS database in 2018/19, ~52 per cent of PRAs deployed less than 100 workers whereas only 9 per cent deployed more than 500 workers. A snapshot is shown below.

Figure 99- Volume of migrants by RAs in 2021/22¹⁷⁹



Hence, there is a need of merger of smaller PRAs (who are even unable to mobilize 100 workers annually) to create competitive PRA entity.

6.8.6 Concentration of PRAs around traditional destination countries

It has been observed that number of destination countries where RAs sent migrants to are around than two in number. It shows that RAs mainly handle two or three countries only. Most of the RAs sent workers to two to three destination countries.

179. MoLESS, Nepal Labour Migration Report, 2022, forthcoming.

Figure 100- Number of destination countries with number of RAs working there¹⁸⁰

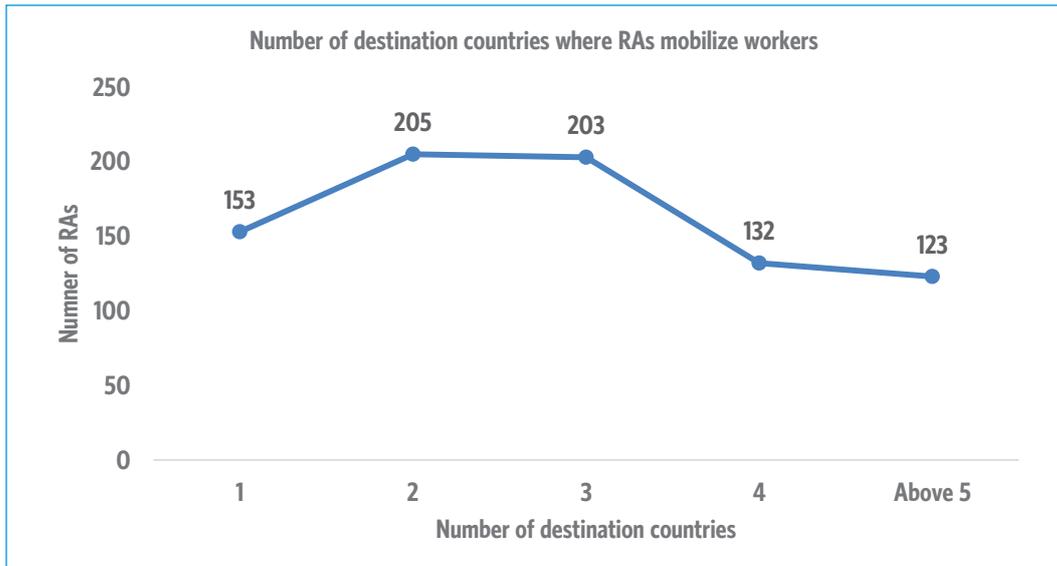
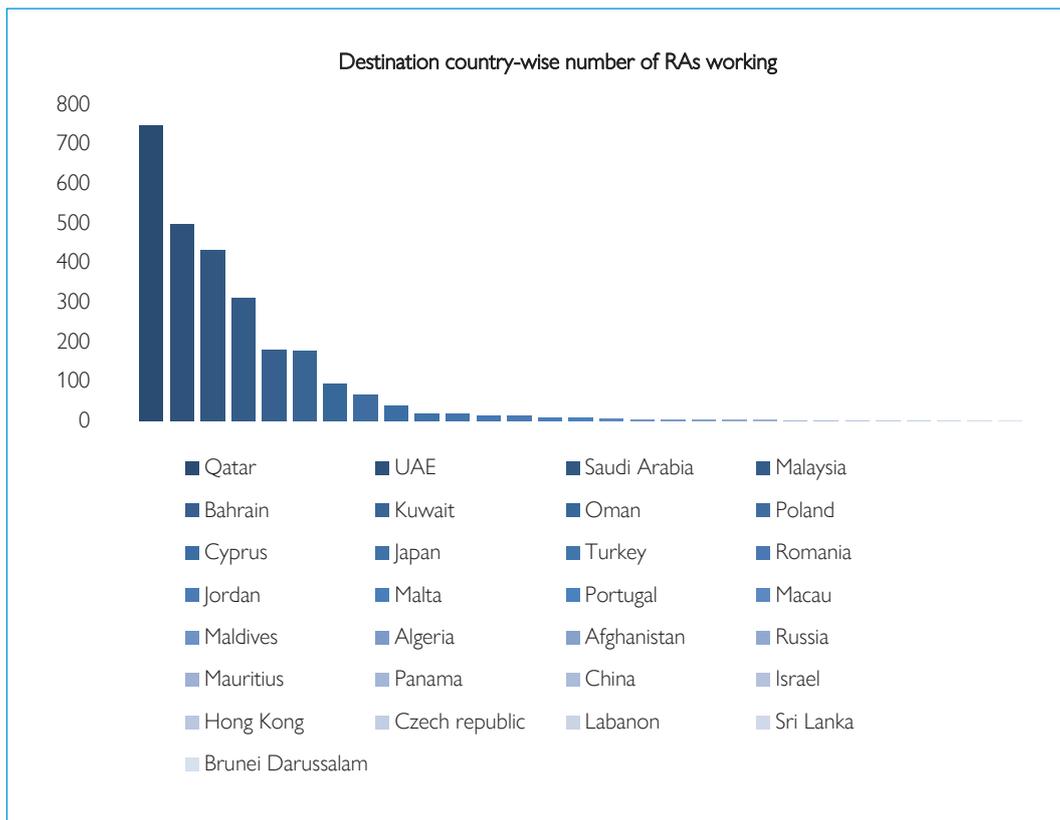


Figure 101- Destination country wise number of working RAs¹⁸¹



Hence, there is a need of diversification.

180. MoLESS, Nepal Labour Migration Report 2022 (Kathmandu: MoLESS, forthcoming)

181. Nepal Labour Migration report 2020.

6.9 Recommendations

To address abovementioned lacunas, some of the steps can be –

- There should be decentralization of migration governing laws at provincial and local levels.
- Strict monitoring cell for compliance check by PRAs, employer and workers should be set up. MOLESS has already issued a Guideline for the Mobilization of a Rapid Response Team to strengthen the monitoring of RAs to ensure effective control of fraudulent activities.
- Latest IT and online platforms should be harnessed for outreach programmes by PRAs.
- Merger of PRAs should be promoted through policy and regulatory interventions. FEA rule is amended already to facilitate mergers among PRAs to screen out which are unable to mobilize over 100 workers annually for two consecutive years. But it should be promoted and implemented upon.
- RAs should be incentivized by GoN to diversify their bucket of destination country.



CHAPTER 7

SKILLING OF NEPALI YOUTH

7 Context

Nepal is becoming one of the largest sending countries in Asia. A young person is six times more likely to be unemployed than an adult in Nepal (19 per cent and 3 per cent respectively). For young people who are working, informality is the norm. Over 90 per cent of young workers are in the informal economy. Young people facing bleak employment prospects are leaving the country in large numbers as temporary outmigration surges.¹⁸²

With these worrying trends, Nepal has an urgent need to develop effective policy responses to the grave problems facing young people. This section focusses on the policy environment surrounding youth employment, identifying gaps and proposing recommendations with the intention to assist

7.1 Challenges

Nepal to confront the challenges of poor youth transitions to the labour market.

7.1.1 Mainstreaming youth targets into national policy agendas

Immediate action on setting up a social dialogue platform on youth employment could provide a range of positive impacts. Among them are signalling that the Government places priority on finding solutions for the problems of young people in the country; enabling tripartite partners and other stakeholders to review existing policies and identify priorities for implementation; and in broad terms, supporting the democratization of the youth population by facilitating their organization, representation and voice and providing an outlet for a discussion of their challenges.

7.1.2 Shifting the focus to employment

Youth issues notwithstanding, there is scope to establish employment generation more firmly in general into economic policies. Analysis of this is still high as well as the growth of the services sector. The industrial sector, particularly manufacturing, remains weak, and has been declining in the recent period. GDP growth therefore has primarily been driven by exogenous factors – monsoon-based agriculture and high inflows of remittances to boost services. In effect, Nepal has bypassed the traditional development trajectory of shifting from agriculture to industrialization, instead leapfrogging to services where poor quality jobs are prevalent. *However, greater investment in its industrial policies, particularly manufacturing, energy, transportation and infrastructural development is likely to reap greater dividends in terms of higher value production and employment generation. Such a shift is also likely to not only support private sector growth both directly and indirectly but also absorb large numbers of highly educated youth into virtuous cycles of research and development and innovation. Nepal could therefore consider placing more resources and investment into its existing industrial policies, expanding its infrastructural development programmes and ensuring greater investment in energy development, which are currently having a generally restrictive effect on manufacturing and private-sector growth.*

182. ILO- https://www.ilo.org/wcmsp5/groups/public/---ed_emp/documents/publication/wcms_502340.pdf.

7.1.3 Revitalizing rural economies

While greater investment in the industrial sector as described above is necessary, this does not negate the need for greater intensification of agriculture. In fact, parallel strategies for increasing productivity in agriculture and supporting the growth of industry can reap significant employment dividends and push Nepal further along on the path of development. Nepal remains a primarily rural country, with agriculture absorbing the largest share of employment despite its share of GDP declining. These low levels of productivity in agriculture can be boosted by intensification and support for farm and off-farm activities, which can generate the types of quality jobs in rural areas that can alleviate poverty rates.

Youth from marginalized communities and castes are among the most vulnerable to poor transitions to the labour market. They are more likely to have less education and to find themselves among the working poor. Many young people are found on smallholder farms as both paid and unpaid family labour. In general, rural labour markets function poorly in Nepal: labour market governance systems are weak, infrastructure is poorly developed, and education and skills development institutions are poorly resourced.

As a consequence, many young people, particularly young men, migrate to urban areas or overseas, leaving land untilled or to be worked in a subsistence manner by the remaining women. *Providing these young people with access to quality education, land, finance, skills, market information, technology and opportunities for entrepreneurship, can significantly stimulate rural economies and provide much needed jobs in these areas. A proven mechanism for facilitating this is through the development of local development strategies.* A range of well-tested participatory methodologies for revitalizing local communities has been used around the world. Nepal already has experience with similar local development programmes such as the Sajhedari Bikaas activities funded by the United States Agency for International Development (USAID) and the Micro-Enterprise Development Programme (MEDEP) supported by the United Nations Development Programme (UNDP). Nepal could consider expanding these programmes into other regions with high levels of poverty and outmigration. Ensuring specific targeting of young people in terms of entrepreneurship support, microfinance access, training opportunities and market information could significantly improve the youth employment outcomes in these areas.

Furthermore, *Nepal can also consider capitalizing on its rich experience in public works programmes that use labour intensive methodologies by expanding those efforts into a national rural employment guarantee programme similar to the one currently being implemented in India. While there have been previous discussions on this, it has dropped off the national agenda while the problems surrounding the constitution are being resolved. Should the discussions resume, developing specific youth employment targets would be an important means of ensuring that young people have better opportunities to remain in their home communities with a stable income, and to become drivers of their community's development.*

7.1.4 Making migration a genuine choice

A number of studies and investigative reports have highlighted the poor working conditions of Nepalese workers abroad in recent years. The risks are high – situations of exploitation and abuse are commonplace, and tragically can even result in fatalities. According to Migrant Rights, 726 Nepalese workers died overseas in 2013. Yet many young people in Nepal take

this route because their employment prospects are so limited in their home communities.

Despite a number of policies being put in place in recent years, including the 2012 Foreign Employment Act, it is clear that enforcement and the regulatory environment for migration has not been able to keep pace with the sheer numbers of young Nepalese seeking work abroad. Nepal has become one of the largest sending countries in Asia.

There are a full range of measures that can be put in place to support the rights of migrant workers and ensure that migration pays dividends for sending and receiving countries, and for migrant workers themselves. ILO has developed a nonbinding Multilateral Framework on Labour Migration, which provides guidelines based on international best practice on how to better regulate migration flows.

For Nepal, this process should start from the pre-departure process, including the regulation of recruitment agencies that are often the starting point of the exploitation of young migrant workers. In 2014 a crackdown on private recruitment agencies revealed a number of illegal practices in their operations. Nepal could consider setting up mechanisms for continuing the monitoring of private recruitment agencies and ensuring their compliance with regulations. Such guidance is provided in ILO conventions such as the Private Employment Agencies Convention, 1997 (No.181).

Furthermore, proper pre-departure training, which can enhance potential migrants' awareness of their rights as well as their options in case of difficulties, is also essential. Even if scarce resources prevent the Department of Foreign Employment from being physically present in regions prone to high levels of migration, they will need to find outreach mechanisms to provide vital information and training to potential migrants. These could include radio programmes in different languages, mobile information units that can travel to remote regions, printed information in various languages, encouraging returnees to share experiences in community meetings and so forth. Streamlining and simplifying the procedures and reducing the costs of migration can also significantly reduce the scale of undocumented migration with its attendant risks and vulnerabilities.

Reintegration courses have also proven to be highly valuable for returnees in other countries such as the Philippines, where young workers can learn about opportunities to take advantage of the skills and experiences, they have garnered from their migration experience. Additionally, *Nepal could establish investment opportunities for remittances in these reintegration programmes. With remittances swelling the incomes of poor households throughout Nepal, there is the challenge of developing mechanisms for not exhausting the whole remittance on consumption but investing part of it in the productive sector and in entrepreneurship development. Such productive investment opportunities are likely to generate employment, which can in turn enable returnees not to have to endure continuous cycles of repeat migration to support their families. Nepal could therefore consider a range of packages to support the investment of remittances into local communities.*

A further area in which Nepal can take action is the removal of obstacles to women's access to overseas employment. Official figures show that only 3 per cent of migrants are women, though it is clear that the irregular migration of women is much higher. While restrictions are often seen by policymakers as a way of "protecting" women, in reality, given the strong demand for occupations such as domestic work in receiving countries, and the weak employment opportunities in the local labour market, such restrictions result in driving migration underground where exploitation and abuse are rife. Women with irregular migration status are much more vulnerable than those with rights protected by official

migration processes. Removing restrictions on women's migration, while also expanding bilateral agreements with receiving countries, simplifying migration procedures, expanding access to information and providing safe and transparent remittance opportunities can significantly reduce risks of exploitation.

Finally, with regard to migration, Nepal has a responsibility to its young people to generate jobs locally, which will make migration a genuine choice. Temporary migration should not be seen by policymakers as a solution to the lack of absorption capacity of the domestic labour market. Rather, sending countries such as Nepal have an obligation to pursue policy avenues that can generate greater amounts of employment in their own country.

7.1.5 Expanding educational access

Nepal has made tremendous strides in increasing educational access and attainment in the past few decades, with the current generation of young people far exceeding their parents' level of schooling. Nonetheless, many vulnerable groups are lagging in access, such as Dalit communities, some ethnic minorities, disadvantaged regions, and those in rural areas in general. Continuing to expand educational access can not only avoid early labour market entry and its trajectory of poor-quality employment and lifetime poverty, but also ensure that Nepal is able to fully capitalize on the energy and innovation of its human capital resources. Reintegration programmes for child labourers are also essential in this regard. Expanded interventions to engage child labourers into schooling or older youth into better work opportunities can halt intergenerational cycles of poverty and working children.

Not only will gaps in access for rural communities and vulnerable groups need to be overcome, but measures will also need to be put in place to improve the quality of education overall. Given the high rates of educated unemployed, measures will also need to be put in place to ensure that higher education can respond to labour market demand. Enabling educational institutions to forge stronger linkages with the private sector will be an important part of this process. The development of tripartite councils to oversee the content and curricula of higher education could also be a potential avenue to increase its relevance in the labour market.

7.1.6 Making vocational training an attractive option

The report shows that vocational training is undervalued by young people. Academic education is seen as more prestigious, yet employers are constantly seeking skilled technical workers. While CTEVT has been working to shift these perceptions with vocational training reform, there is still much that could be done in terms of providing incentives to young people in the form of scholarships and other financing opportunities. Greater investment in vocational training, including infrastructure, content, technology and equipment, as well as building the capacity of trainers will be needed. Establishing scholarships in courses with high labour-market demand will also make vocational training more attractive. As with higher education mentioned above, supply-side biases will also need to be removed. Vocational training authorities will need to be engaged in analysis of labour market demand, which can feed into curriculum content. The active engagement of the private sector through, for example, tripartite councils will also be key to turning around the weak position of vocational training institutions.

7.1.7 Building labour market information systems

Both the SWTS and LDES revealed the weaknesses of labour market information systems. The most widely used methods of finding jobs and recruitment were informal channels. Neither young people nor employers put much stock in public employment agencies. There is a great need therefore to strengthen the capacity of these institutions to better meet the needs of both supply and demand in the labour market. As a low-income country, Nepal has severely limited resources to invest in efficient labour market information. Nonetheless, the labour market cannot function effectively without systems to collect and analyse data on existing and future needs. Such information is crucial for policy formulation on human resources development and employment generation. Nepal could consider prioritizing the capacity-building of its public employment agencies to provide better information to job seekers on the one hand, and stronger linkages with employers on the other. Attracting donor attention to this vital area could help overcome existing resource constraints.

7.1.8 Addressing social and economic exclusion

Despite being illegal, discrimination continues to feature in the Nepali labour market. Caste groups such as Dalits and ethnic minorities are amongst those likely to have fewer educational opportunities or employment choices. They are also concentrated among the poorest segments of society. Nepal has put in place a number of initiatives to address caste discrimination but not yet on a scale that could overcome the serious exclusion faced by these communities. Nepal may wish to consider expanding interventions such as affirmative action policies in education, through scholarships and grants, as well as in hiring for public service. Public awareness raising is also warranted along with the development of democratic platforms through which these communities can be encouraged to organize and articulate their rights. A number of public works programmes are also oriented to vulnerable communities. Nepal may wish to upscale these programmes to expand their coverage to more regions and communities.

Again, in view of limited resources, this may be an area in which the donor community and the UN country team could provide additional support to Nepal. Ensuring more resources are directed to these communities is essential to enable them to enjoy the same rights as other citizens in the new nation.

Gender discrimination also appears to be prevalent in the labour market. As the report showed, women are often concentrated in certain poorly remunerated sectors and vulnerable employment categories. They are also likely to have had less educational attainment and weaker access to a range of resources including land, technology, finance and skills.

In concrete terms, for Nepal this will require analysing existing policies to see the extent to which women's constraints and needs are addressed, and the availability of resources directed towards vulnerable women (a mainstreaming approach). At the same time, gender-specific interventions may also be warranted. For example, increasing access to education through scholarships, conditional cash transfer programmes, as well as through in-kind incentives, have proven effective in other low-income countries in retaining girls in school. For young women in the labour market, opening up access to a range of productive resources including finance, information, land, business advisory services and skills upgrading could significantly expand their income opportunities, particularly in rural communities. Awareness-raising among employers may also be warranted given that the LDES showed that where a gender preference was expressed in recruitment.

7.2 Domestic Employment Landscape in Nepal

Agriculture, forestry and fishing is the highest employing industry with one in five people in Nepal was employed in it. Females were mostly employed in agriculture, forestry and fishing, wholesale and retail trade and education industries and males in construction, manufacturing and transport industries as highlighted in the table below.¹⁸³

Table 23-Industry wise profile of the employed (in thousand numbers)

Industry	Male	Female	Total
Agriculture, Forestry and Fishing	652	871	1523
Manufacturing	719	353	1072
Construction	867	111	978
Wholesale & retail trade, repair of motor vehicles & motorcycles	695	545	1240
Transportation and storage	315	7	322
Accommodation and food service activities	204	167	371
Education	304	254	558

Source: Report on the Nepal Labour Force Survey 2017/18

Mostly employed people (23.8 per cent) were employed in service and sales occupations, followed by elementary occupations (around 20 per cent) and Craft and related trade occupations (19.6 per cent). Managerial occupations accounted for only 1.2 per cent of total employment.

Table 24-Share of employment by occupation (in per cent)

Occupation	Share of employment (per cent)
Managers	1.2
Professionals	8.2
Technicians and Associate Professionals	4.4
Clerical support workers	3.1
Service and sales workers	23.8
Skilled agricultural, forestry and fishery workers	13.7
Craft and related trades workers	19.6
Plant and machine operators, and assemblers	5.4
Elementary occupations	20.3
Other	0.3

Source: Report on the Nepal Labour Force Survey 2017/18

183. Nepal-Labour-Force-Survey-2017_18-Report.pdf (cbs.gov.np)

Between 2008 and 2018, the share of wage work in Nepal increased from 17 per cent to 24 per cent of total employment. Four million jobs were added to the economy since 2008 till 2018, out of which nearly half were wage jobs. Despite significant increase in wage employment, there are not yet enough wage jobs to absorb all job seekers which leads many into self-employment or unpaid work and seek foreign employment. International migrants earn much higher wages than their counterparts at home despite the mostly unskilled nature of the work in foreign employment.

Sectoral share of employment is highlighted below which shows sectors with wage jobs like Industry and Services has an increasing trend and non-wage sector jobs like Agriculture has decreasing trend.¹⁸⁴

Table 25-Sectoral share of employment (in per cent)

Year	Agriculture	Industry	Services
1998	76	10	14
2008	74	11	15
2018	63	16	21

7.2.1 Wage and Non-Wage Jobs in Nepal

The construction, manufacturing and hotel and restaurant sectors increased their shares of total employment. The finance and real estate, and the transport and communications sectors, have the highest added jobs and average productivity levels. Wholesale and retail (employing low-skilled workers) and health and education (employing more educated workers), both increased their shares of total employment. Formal employment is rare and only concentrates in urban areas.

Sector wise most wage jobs added from 2008 to 2018 are highlighted below:

- Construction sector (over 640,000 temporary wage jobs)
- Health and education (350,000), mostly temporary wage jobs
- Manufacturing (216,000), mostly temporary wage jobs
- Financial and business services (160,000), mostly temporary wage jobs

A number of factors creates a barrier for the creation of more and better jobs and are not creating enough good-quality wage jobs to absorb available labour, especially women. Firms cite competition, tax regulations, high taxes, and bureaucratic inefficiencies as obstacles. Workers' skills are generally low: even among wage employees. Three-quarters have not completed secondary school and two-thirds are in relatively low-level occupations. Employers of small and medium enterprises (SMEs) report that they lack crucial skills such as marketing, management and technical know-how. Entrepreneurs also report a shortage of skilled labour needed to expand their operations.

7.2.2 Industries and Proposed Employment in Nepal

Altogether 8,454 number of industries with proposed capital of NPR 2283.53 billion contributing to generate total 2,68,759 employment up to at the end of the Fiscal Year 2020/21 are registered in Department of Industry (DOI) (Large, Medium and Small-scale

184. Nepal-Jobs-Diagnostic.pdf (World Bank – Jobs Diagnostic Nepal)

Industries only). 3,163 enterprises are in manufacturing sector, followed by 2,264 enterprises in service sector which clearly shows that manufacturing and service sectors are the largest employing sectors in domestic labour market of Nepal. This data does not cover Micro, Cottage and Small Industries registered throughout the country.

The province wise registration data of these 8,454 industries is highlighted below.¹⁸⁵

Table 26-Industries registered and proposed employment by province (up to 2020/21)

Province	Industry registered	Proposed employment (up to 2020/21)
Bagmati	5,628	3,76,906
Province No. 1	808	82,192
Province No. 2	572	58,451
Lumbini	579	58,216
Gandaki	705	39,955
Sudurpashchim	122	10,500
karnali	40	2,575
Total	8,454	6,28,795

Source: Industrial Statistics 2021/21 Department of Industry, Nepal

The data shown above clearly highlights that the highest number of industries and proposed employment belongs to Bagmati Province which is significantly higher than other provinces.

Sector wise data of these 8,454 industries is highlighted below.¹⁸⁶

Table 27- Sector wise Industries registered and proposed employment (up to 2020/21)

Sector	No. of Industry	Proposed Employment (up to 2020/21)
Manufacturing	3,163	3,33,837
Service	2,264	1,28,981
Tourism	1,864	74,340
Agro and Forestry	500	38,277
Energy	451	37,257
Mineral	70	7,296
Information Technology	82	4,961
Construction	60	3,846
Total	8,454	6,28,795

Source: Industrial Statistics 2021/21, Department of Industry, Nepal

The data shown above shows that the highest number of industries and proposed employment are in Manufacturing sector followed by Service and Tourism sector.

185. Notices-20211126104512930.pdf (doind.gov.np) - Industrial Statistics 2021/21 Department of Industry, Nepal

186. Notices-20211126104512930.pdf (doind.gov.np) - Industrial Statistics 2021/21 Department of Industry, Nepal

7.2.3 Trends of Foreign Investment and Employment generation in Nepal

As per the Department of Industry data, Large, Medium and Small-Scale Industries approved for Foreign Direct Investment (FDI) and proposed employment generated (up to 2020/21) are highlighted below.¹⁸⁷

Table 28- Sector wise FDI projects and proposed employment (up to 2020/21)

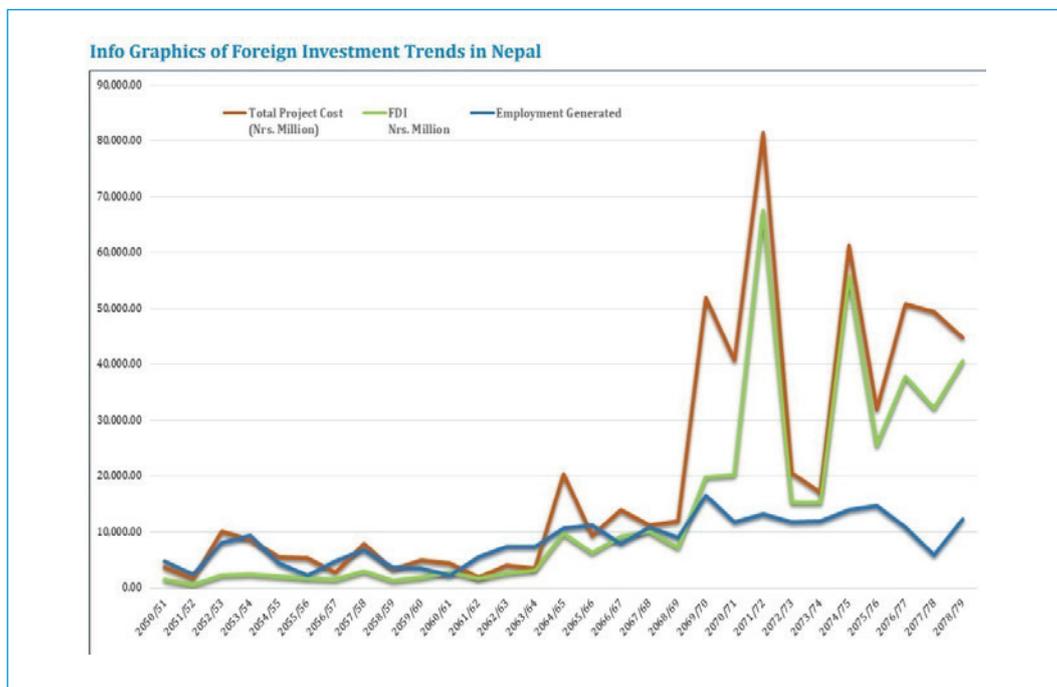
Sector	No. of FDI Projects (No. of Industries approved for Foreign Investment)	Proposed Employment (up to 2020/21)
Manufacturing	1,212	1,03,091
Service	1,722	73,162
Tourism	1,689	58,649
Agro and Forestry	291	10,524
Energy	90	11,837
Mineral	72	8,786
Information Technology	112	5,745
Infrastructure	46	3,226
Total	5,234	2,75,020

Source: Industrial Statistics 2021/21 Department of Industry, Nepal

The data shown above clearly shows that the highest number of FDI projects and proposed employment are in Manufacturing sector followed by Service and Tourism sector.

Employment generation and FDI are related to each other, a greater number of FDI projects means a greater number of employments generation, but Employment generation is not increased substantially as per FDI increment in Nepal as shown in the graph below.

Figure 102- Foreign Investment and employment generation trend in Nepal



*Image Source: Industrial Statistics 2021/21 Department of Industry, Nepal*¹⁸⁸

Most feasible project areas for foreign investment in Nepal as per the Department of Industry report are the following:¹⁸⁹

- Agriculture and Agro-based industry
- Tourism industry
- Service industry
- Energy industry
- Manufacturing industry
- Construction industry
- Mineral Resources and mineral-based industry
- Textile and apparel industry

187. Notices-20211126104512930.pdf (doind.gov.np) - Industrial Statistics 2021/21 Department of Industry, Nepal

188. Notices-20211126104512930.pdf (doind.gov.np) - Industrial Statistics 2021/21 Department of Industry, Nepal

189. Notices-20211126104512930.pdf (doind.gov.np) - Industrial Statistics 2021/21 Department of Industry, Nepal



CHAPTER 8

MAPPING OF REINTEGRATION SERVICES IN NEPAL

8 Background

In Nepal, there is no effective reintegration programme. The returnees, individually or in groups, have been operating various businesses like homestay and commercial farming to earn their living. In the last fiscal year, Nepal received Rs1 trillion in remittance from migrant workers. Remittance has become a lifeline for the country's economy, but the migrants who have spent their entire youth abroad and sent money back to the country have to struggle to reintegrate financially and socially when they return.¹⁹⁰

The existing laws and regulations on labour migration are remittance centric. There are no effective policies to reintegrate the workers when they decide to come home and live with their families. Though the government is trying to implement the reintegration policy, the implementation has been difficult so far in the absence of an integrated migration policy.

“Any programme which lacks a comprehensive policy to organise the labour migration sector will be ineffective.”

An integrated migration policy would mean foreign policy, economic policy, trafficking-related policy, foreign employment policy and immigration law all working together with the common goal of benefiting migrant workers.

COVID-19 pandemic has had a significant impact on Nepali migrant workers, who have been key contributors to the socioeconomic development of Nepal. During the migration cycle and upon return, migrant workers continue to face vulnerabilities and challenges to fully reintegrate back in their home communities due to their migration experiences.

The research has identified good practices, gaps, challenges and has recommended a way ahead that can be a departure point for addressing the gaps surfaced for a sustainable reintegration.

8.1 Institutional Frameworks

8.1.1 Government Sector

Government sector institutional framework is explained below.

190. publications.iom.int/books/mapping-reintegration-services-nepal.

Table 29- Ministries directly or indirectly related to reintegration

Institution	Responsibility
Ministry of Foreign Affairs	<ul style="list-style-type: none"> ■ Representation of Nepal abroad ■ Consular practice and services ■ Record of the Nepalese citizens abroad and rescue and protection of their rights
Ministry of Women, Children and Senior Citizens	<ul style="list-style-type: none"> ■ Prevention of the violence against women, human trafficking and transportation ■ Policy, law and standards related to children, child welfare, rescue, rehabilitation and old age care home
Ministry of Youths and Sports	<ul style="list-style-type: none"> ■ Youth self-employment fund
Ministry of Labour, Employment and Social Security	<ul style="list-style-type: none"> ■ Policy, law, standards, management and regulation related to foreign employment ■ Policy, law, standards and regulation related to labour and social security ■ Statistics, study and research related to the employment ■ Monitoring of the labour and occupational health and safety and Commission related to labour relations ■ Policy on employment-oriented skill and vocational training ■ Policy, law and standards related to occupational health and safety ■ Integrated data management, study and research related to unemployment

Ministry of Labour, Employment and Social Security is the concerned ministry to look at the issues of reintegration of returning migrant workers is. However, Ministry of Foreign Affairs, Ministry of Women, Children and Senior Citizens, and Ministry of Youth and Sports have the responsibilities that contribute directly to the reintegration and other ministries contribute within their own jurisdictions.

Foreign Employment Board, formed under the Foreign Employment Act 2007, is the responsible authority for the welfare and skill training for returnees and families of migrants. The Board functions under the Ministry of Labour, Employment and Social Security, the highest regulatory authority responsible for the governance of the labour, employment and social security sector in the country. The Board is also responsible for the awareness and information dissemination related to foreign employment.

Nepal Rastra Bank (NRB) is the responsible institution to formulate and manage the national monetary and foreign exchange policies. It is also responsible for the increase in the access of the financial service. In addition, NRB has also been supporting the implementation of the national programmes and various projects related to the financial sector development and governance. It formulates policies loans, interest, remittances and others.

National Skill Testing Board (NSTB) is responsible for the recognition and certification of the skills acquired traditionally or through work experience.

Council for Technical Education and Vocational Training (CTEVT) is responsible for the development of the curriculum and providing training through training institutions. It is also responsible for the monitoring and evaluation of the training providers and trainees. The Council conducts skill tests periodically and awards certificate upon passing.

Office of the Company Registrar is responsible for the registration of companies. The office issues the license and regulates operation of the company. Returnee migrants can register their companies here as enterprises for authenticity.

Non-government sector Various organizations under NNSM and the Alliance Against Trafficking in Women and Children in Nepal (AATWIN), like different non-government organizations including the returnee migrants' organizations like, and others have been providing wide range of services including the reintegration support through their representations at the province and local level. United Nations agencies like IOM, United Nations Development Programme, development partners like, USAID, UK Aid, SDC and others also provide different supports for the reintegration of returnee migrant workers through their partnership with CSOs. The International Organization (ILO) had carried out programmes for returnees in collaboration with KOICA.

8.1.2 Private sector

Different banks and financial institutions have developed financial products, including soft loans under the policy of Nepal Rastra Bank, that contribute to the reintegration of returnee migrant workers and other youth entrepreneurs. The remittance companies are channelling the capital into the country while the Federation of Nepalese Chambers of Commerce and Industry and other entities facilitate in addressing the issues in the sector through the formation of Foreign Employment Forum.

8.2 Gaps And Challenges

The federal, provincial, and local level governments and stakeholders have been knowingly or unknowingly conducting activities that are directly or indirectly supporting the sustainable reintegration of returnee migrant workers. However, through key informant interviews, some gaps and challenges have been identified in their efforts which are discussed below.

8.2.1 Structural level

The sustainable reintegration of returnee migrant workers has received little attention of all the three levels of governments. Budgets, annual plans and programmes of the governments reflect that the reintegration issue has inadequately been discussed as a government agenda. Very few programmes and activities are directly supporting migrant workers' sustainable reintegration. Increasing the number of programmes and activities that directly support the sustainable reintegration of migrant workers is a challenge for all the stakeholders. In the absence of the reintegration-specific policies and laws, the federal, provincial and local level governments and other actors have implemented the programmes contributing to reintegration of returnee migrants on an ad hoc basis.

The programmes and initiatives contributing directly or indirectly to the sustainable reintegration of returnee migrant workers are scattered and have been implemented independently in an individual organization level. MoLESS has been working on preparing the national reintegration guideline that provides the avenues for effective and sustainable reintegration initiatives. There are many opportunities to amplify the outcome of the resources available in contributing to the reintegration initiatives and services by creating the sharing and referral mechanism that can increase the access of such services to the reach of the returnee migrant workers.

8.2.2 Community level

Reintegration is a multidimensional process where migrant workers' direct participation in economic and social activities upon return is a continuation to the contribution made through the remittances sent home while working abroad. Available plans and programmes that have directly or indirectly supported the sustainable reintegration of returnee migrant workers at the community level are less meant for supporting collective groups of returnees. Instead, the returnees have been engaged in new community-based programmes or are integrated into the existing programmes. Consequently, there is a risk of limited impact on returnees who have limited involvement in or limited access to the programmes. There is a lack of information and awareness on the reintegration services available in the communities. For example, the interview respondents shared that most of the returnee migrant workers are unaware of the soft loan facility. Beneficiaries, including returnee migrant workers, have experienced complexities in receiving services available in their communities. The complexities are mainly on getting reliable information and the documentation process.

8.2.3 Individual level

The data of returnees are not readily available although the Department of Foreign Employment has started keeping the records. In addition, there are no data of the migrants returned from India. During the first wave of the COVID-19 pandemic, local levels had kept the records of the returned migrants. However, the effort did not continue, with the decreasing number of coronavirus positive cases. Since there is not a standard framework of keeping the records of the returnees, the data recorded by the local levels are inconsistent. As an individual, a returnee migrant worker's vulnerability assessment, background information collection, needs and skills assessment, counselling, referrals, follow-up and so on are hardly available, except some organizations' projects that have worked on psychosocial counselling. At a time when traditional agricultural and livestock farming has not helped people generate income enough to sustain and support the families, the reintegration supports mostly concentrated on the traditional agricultural and livestock farming may not prevent the returnee migrants from remigrating. Thousands of migrant workers have returned with injuries and illness until now.

In the FY 2020/21, the FEB has provided financial assistance of NPR 73 million to 143 migrant workers who returned due to injuries or ill conditions. However, it is a financial assistance, not a reintegration support. At present, the reintegration services available are inadequate and limited in scope and access. The reintegration services are looked at through the frame of start-up financial supports and skill development initiatives. While the sustainability of the reintegration largely depends on the long-term support and facilitation in creating the conducive environment of the returnee migrant workers by providing related information, infrastructural support, market linkage, forming the affirmative social perception. There is a lack of data of the returnees who have received services that directly or indirectly support their reintegration. In addition, there is a big challenge of finding details of programmes in the documents.

8.3 Key Recommendations and Way Forward

8.3.1 Structural level

- All levels of government should introduce policies and related laws that govern the reintegration of migrant workers and their family members, adopting whole-of-society and whole-of-government approaches and considering the needs, capacities, and interests of returnee migrant workers.

- Local governments should be capacitated and encouraged to manage reintegration, ensuring the participation of returnee migrants. The local governments should run activities to encourage returnee migrants and their families to utilize their remittances in productive sectors.
- The Federal Government should formulate a national policy and accompanying guidelines; the local government should work towards effective implementation of these; and the provincial government should play a coordinating and monitoring role.
- The Federal Government should develop a standard template for local governments for keeping disaggregated data of returnees, including returnees from India, for data consistency. The Government should consider including the components that can support reintegration of migrant workers in bilateral agreements and memorandums of understanding with destination countries.
- Reintegration services should be embedded in broader sustainable development priorities of the country, which require linking with labour gaps, education needs and so on.
- The Government and other actors working for migrant workers' welfare should increase the number of programmes directly supporting the reintegration of migrant workers.

8.3.2 Community level

- In addition to the economic dimension, the social and psychological dimensions of reintegration should also be considered in designing activities for sustainable reintegration. Also, services should be gender responsive.
- Support should not be limited to traditional agriculture and livestock farming; returnee migrant workers should be encouraged to bring new and innovative ideas.
- The Government and other actors working in reintegration should ensure that returnee migrant workers are well informed about available services, such as soft loans, that support their sustainable reintegration. Migrant resource centres and employment information centres at the local levels should play a major role in disseminating information.
- Reintegration programmes should target returnees collectively, as much as possible, to avoid the risk of limiting the coverage of returnees by the programmes.
- The impacts of available resources can be amplified through collaboration and cooperation between different institutions by forming a sharing and referral mechanism.
- The processes for availing the services should be easy and simple.

8.3.3 Individual level

- Returnee migrant workers should be provided with access to social protection and services, and increased access to justice, psychosocial assistance, vocational training, employment opportunities and decent work, recognition of skills acquired abroad and financial services to build upon their entrepreneurship, skills and human capital.
- Migrant workers should be provided with information on reintegration services in the pre-departure phase of migration, so that they can plan their reintegration well before going abroad for employment.
- Reintegration support should address the health issues of returnee migrants. Health check-ups upon return can be a base data-gathering point, and the return data kept by the Government should also include health indicators.
- The soft loan process should be easy and simple. Returnee migrant workers should be supported in developing business plans.
- Activities supporting the reintegration should be aligned more closely to the needs and preferences of returnees, and to local contexts, needs and priorities.
- The Government can make a returnee migrant worker's vulnerability assessment, background information collection, needs and skills assessment, counselling, referrals and follow-ups mandatory.

ANNEXURE

9 Checklists

9.1 Annexure 1: Interview checklist for government institutions

Interviews to be conducted with the representatives from Ministry of Labour, Employment and Social Security, Department of Foreign Employment, Foreign Employment Board, Ministry of Industry, Commerce and Supplies, Department of Industry, Department of Immigration, Ministry of Education, Science and Technology, Ministry of Communications and Information Technology, Ministry of Foreign Affairs, Special Economic Zone Authority, Ministry of Agriculture and Livestock Development, Ministry of Culture, Tourism and Civil Aviation, National Planning Commission, Nepal Rastra Bank, National Information Technology Center and provincial government (Ministry of Social Development, Ministry of Industries, Tourism, Forest and Environment, Provincial Planning Commission, Ministry of Economic Affairs & Planning) and representatives from select rural municipalities/municipalities.

Note: *The questions will be adapted based on the stakeholders' relevance and scope of work.*

Personal information: Name, Designation, Organization

Skill and training programmes for aspirant migrant workers

1. What is the government's present policy on skilling aspirant migrant workers? What are the specific objectives and targets laid out in the policy?
2. Are there skill training programmes specific to the aspirant migrant workers?
3. Do you have collaboration with other vocational/technical/skills providing agency such as CTEVT, VSTDA or other institutions? Could you elaborate?
4. Are there specific occupational categories prioritized by your agency for imparting skill training?

Coordination with other governmental and non-governmental/ international organizations

5. What kind of coordination activities do you undertake between other government and non-government agencies for labour migration?
6. Do you also coordinate with them for the rehabilitation and reintegration of migrants into the Nepali labour market?

Promotion of industries

7. What are the activities being undertaken for the promotion of industries?
8. What are some of the upcoming/emerging industries of Nepal? Can returnee migrant workers be integrated into these industries?
9. Which industries do you think have a potential to utilize the skills of migrant workers?
10. Are any industries in Nepal recruiting returnee migrant workers? Can you name a few? What are the obstacles for their employment in the industrial sector in Nepal?
11. Are there any activities being carried out for the promotion of industries at the province and local level?

Challenges and opportunities in reintegration of returnees into labour market

12. What are the problems/challenges faced by returnee migrant workers while reintegrating into the Nepali labour market?
13. What kind of opportunities are there for Nepali returnee migrant workers in the domestic labour market?

Activities/ Programmes targeted towards returnee migrants

14. Have you targeted any programmes and activities towards returnee migrant workers? If yes, what kinds of programmes? Are there any economic integration-related programs?
15. Provide the examples of reintegration programmes carried out in the past? How successful were such programmes? What were the challenges like?
16. What are the reintegration activities being carried out at the provincial and local levels?
17. Are there any non-government organizations/private sectors working for the reintegration of returnee migrants at federal, provincial and local levels? What kinds of activities are being conducted?

9.2 Annexure 2: Interview checklist for vocational schools/ training centres

Interviews to be conducted with representatives from vocational training institutes in Nepal, including Center for Technical Education and Vocational Training (CTEVT), Vocational and Skill Development Training Center, and Nepal Academy of Tourism and Hotel Management (NATHM) and other similar institutions.

Note: The questions will be adapted based on the stakeholders' relevance and scope of work.

Personal Details: Name, Designation, Institution

Information about the organization and vocational training/ education

1. When was this institution established? Where is it located?
2. How long have you been running vocational training programmes?
3. What type of courses do you offer? (Probe: Types of trainings provided, popularity of trainings, target groups, background of students, number of students, fees of training and time period)
4. Do prospective migrant workers attend the training? If yes, why do they take such training? Where do a majority of such people go after receiving the training?
5. What type of training programme is preferred by migrants for skill development? (Short term vocational courses, pre-diploma technical school leaving certificate (TSLC), diploma/proficiency certificate level, 9-12 level TVET programmes.)
6. Have you received accreditation from CTEVT / other government institutions to run vocational training?
7. In your experience, what percentage of your students have been successful in migrating to other countries? (Probe: overall trend, institutional success, gender)?

Matching market demand and migrant workers' skill

8. What are some of the upcoming industries of Nepal? Which industries have the potential to utilize the skills of migrant workers?
9. What are the opportunities and challenges to link the skills of returnee migrant workers and industries in Nepal? Are there any specific policies formulated? (Probe: government's plans and programmes for development of human resources, budget allocation and responsible ministries and line agencies)
10. Are you aware about any activities being carried out for the promotion of industries and development of industrial human resources at the province and local level? (Probe: What kinds of training are provided by CTEVT at the provincial level?)

Challenges and opportunities in reintegration of returnees into labour market

11. What are the problems/challenges that refrains Nepali returnees to use the skills that they learn from employment abroad?
12. Is there a potential for integrating Nepali returnee migrant workers into the Nepali industrial sector? What are the opportunities and challenges in doing so?
13. What are the problems/challenges faced by returnee migrant workers? Are there any differences due to the choice of their destination?
14. Do you know about any programme that link aspirant/ returnee migrant workers into the industries?

Activities targeted towards returnee migrants

15. Have you targeted any training/activities towards returnee migrant workers? If yes, what kinds of programmes? Are they specific to the skill level of the returnees or from where they returned? (Probe: skill certification of returnees by National Skill Testing Board/CTEVT at federal and provincial levels?)

Coordination with other governmental and non-governmental/ international organizations

16. Do you coordinate with the government and non-government organizations while conducting training/ programmes for the prospective and returnee migrants? If yes, with what kinds of organizations?

9.3 Annexure 3: Interview checklist for the private sector

Interviews to be conducted with representatives from Federation of Nepalese Chambers of Commerce & Industry (FNCCI), Nepal Chamber of Commerce (NCC), Confederation of Nepalese Industries (CNI), Federation of Nepali Cottage and Small Industries (FNCSI), Federation of Contractors Association of Nepal (FCAN), Hotel Association Nepal (HAN), and Trekking Agencies' Association of Nepal (TAAN), among others.

Note: *The questions will be adapted based on the stakeholders' relevance and scope of work.*

Personal information: Name, Designation, Institution

Observation on skill training

1. What is your observation on the skill development and training programmes currently conducted in Nepal?
2. Do you know about any training programme that are conducted in partnership between the vocational training institutions and the private sector? Do you also know if the government (federal / provincial / or local) is also involved in such programmes?
3. Do you know of any programmes that are specifically targeted to the aspirant or returnee migrants?

Impact of labour migration on industrial sectors in Nepal

4. Have you observed any impact of labour migration in the industrial sector in Nepal? What are they? Has it created any challenges or opportunities in your sector of work?
5. Are there any ways the labour migration could benefit the industrial sector in Nepal?
6. What are the opportunities and challenges to develop industrial human resources in Nepal? Are there any policies formulated? (Probe: government's plans and programmes for development of human resources, budget allocation and responsible ministries and line agencies)

Utilization of returnee migrants in the Nepal industrial sector

7. In your opinion, what are some of the upcoming industries of Nepal?
8. Which industries have potential to utilise the skills of migrant workers? What are the opportunities and challenges in doing so?
9. What are the problems/challenges that refrain the returnee migrants to utilise the skills acquired from foreign employment in the domestic labour market?

Role of government in reintegration of returnees

10. What roles should the government play to facilitate the reintegration of returning migrant workers in the industrial sector in Nepal?

(If the interviewee is a part of any companies in any sector, ask the following questions to get a basic understanding of the current human resources)

Information about the company and its human resources

11. When was your company established? Describe the nature of the work your company does.
12. What kind of workers are employed in your company? (Probe: number of employees, background of employees, types of work, skill level of workers)

13. Do you provide any training to your employees prior to or/and after appointment?
(Probe: duration and nature of training)

Presence of returnee migrants in the company

14. Are there any returnee migrants employed in your company? (Probe: kind of work they do, where did they return from, reasons for recruiting them, whether the skills they acquired abroad have been utilized in the company)

9.4 Annexure 4: Interview checklist for private recruitment agencies

Interviews to be conducted with representatives from Nepal Association of Foreign Employment Agencies (NAFEA), and representatives from selected private recruitment agencies.

About the recruitment agency

1. Are there specific occupational categories / employer organizations focused by your agency?
2. Which are the major countries and sectors where your agency sends workers to?
3. What categories of workers have you sent the most? (Probe: Skilled/ Unskilled/ Male / Female)
4. How important is skill development training for migrant workers to secure a decent job at the country of destination? Why?

Observation on existing skill training regime

5. What is your observation on the skill development and training programmes currently conducted in Nepal?
6. Do you know of any programmes that are specifically targeted to the aspirant or returnee migrants?

Utilization of skills of aspirant migrant workers during the recruitment phase

7. How are the skills of migrant workers linked with the recruitment process? What steps do you take to match the skills of aspirant migrant workers with the jobs for which you have received demand from the destination country?
8. Is it mandatory for aspirant migrant workers to show a skill certificate while processing their application?
9. Do employers in the various destination countries require skills certificate from migrant workers across various occupational categories?
10. Is it helpful in you when migrant workers furnish a skill training certificate while approaching your agency? How?
11. How often do you find aspirant migrant workers who have undertaken on-the-job and apprenticeship training?

Integration of returnee migrant workers into the Nepali domestic labour market

12. What opportunities do returnee migrant workers have in the domestic labour market?
13. Do you engage with returnee migrant workers after their arrival to facilitate them in securing a job?

9.6 Annexure 6: List of destination countries as approved for Nepalese migrants

S. No.	Country	S. No.	Country	S. No.	Country
1	Afghanistan	38	Guyana	75	Nigeria
2	Albania	39	Holy See	76	Norway
3	Algeria	40	HongKong	77	Oman
4	Argentina	41	Hungary	78	Pakistan
5	Armenia	42	Iceland	79	Panama
6	Australia	43	Indonesia	80	Peru
7	Austria	44	Iran	81	Poland
8	Azerbaijan	45	Iraq	82	Portugal
9	Bahrain	46	Ireland	83	South Korea
10	Bangladesh	47	Israel	84	Slovakia
11	Belarus	48	Italy	85	Qatar
12	Belgium	49	Japan	86	Romania
13	Bolivia	50	Jordan	87	Russia
14	Bosnia and Herzegovina	51	Kazakhstan	88	Saipan
15	Brazil	52	Kenya	89	Saudi Arabia
16	Brunei	53	Kosovo	90	Seychelles
17	Bulgaria	54	Kwuit	91	Singapore
18	Cambodia	55	Laos	92	Slovenia
19	Canada	56	Latvia	93	South Africa
20	Chile	57	Lebanon	94	Spain
21	China	58	Libya	95	Sri Lanka
22	Colombia	59	Luxembourg	96	Sweden
23	Congo (Congo-Brazzaville)	60	Malaysia	97	Switzerland
24	Costa Rica	61	Macau	98	Tanzania
25	Croatia	62	Maldives	99	Thailand
26	Cuba	63	Malta	100	The Philippines
27	Cyprus	64	Mauritius	101	Tunisia
28	Czechia (Czech Republic)	65	Mecedonia	102	Turkey
29	Denmark	66	Mexico	103	Uganda
30	Egypt	67	Moldova	104	Ukraine
31	Estonia	68	Mongolia	105	United Arab Emirates
32	Fiji	69	Morocco	106	United States of America
33	Finland	70	Mozambique	107	Uzbekistan
34	France	71	Myanmar (formerly Burma)	108	Venezuela
35	Germany	72	Netherlands	109	Vietnam
36	United Kingdom	73	New Zealand	110	Zambia
37	Greece	74	Nicaragua	111	Serbia

Source - Recognized Destination | Department of Foreign Employment (dofe.gov.np) (as accessed on 14th Nov 2022)

9.7 Annexure 7: Summary of primary research interaction for destination countries

- In **Jordan**, mostly jobs for migrant workers do not require specific qualification or certification, they are involved in work as per their physical capabilities. Main sectors and occupations for migrant workers in Jordan are:
 - Domestic workers (home workers)
 - Agriculture (Fruits and Vegetables harvest, fruits picking, packaging, loading and unloading, etc.)
 - Tourist restaurants (waiter/ waitresses, cleaning, etc.)
 - Manufacturing industries of all kinds
 - Services (cleaning services)
 - Construction sector (plumber, carpenters, basic building skills)
 - Transportation and storage & warehousing
- In **Cyprus**, migrant workers from Nepal are mostly hired as domestic workers and farm workers in agriculture and farming (low skilled workers). Emerging sector in Cyprus is IT sector which require highly skilled workforce.
- In **Poland**, work permits are issued according to nine (9) major groups of the Classification of Occupations and Specialties. Highest for industrial workers and craftsmen, workers performing simple work, operators and assemblers of machines and devices.
- In **Australia**, top occupations in demand based on a combination of skills shortages, current job vacancies and projected employment growth over the next five years as per internet vacancy index job ads (June to Aug 2022 monthly average) which are relevant to Nepal context are:¹⁹¹
 - Registered Nurses
 - Aged and Disabled Carers
 - Construction Managers
 - Child Carers
 - Motor Mechanics
 - Retail Managers
 - Chefs
 - Metal Fitters and Machinists
 - Cooks
 - Electricians
 - Civil Engineering Professionals
 - Physiotherapists
 - Gardeners
- In **Israel**, a lot of migrant workers are associated in home care for older citizens (it is common to see Indian and Philippine nationals and also Nepali nationals working in elderly people care area). Some migrants also work in the agriculture sector. Hi-tech industry is big in Israel like Information Technology but low skilled or medium skilled would not qualify for migrant visas in that sector.

191. 2022 Skills Priority List | National Skills Commission.

■ Turkey

- One of the informants mentioned that key focus areas are - construction and manufacturing, workman, technician, labour.
- Another person said manufacturing, construction and service, textile workers, workman and service employee and very low skills, most of the time non-qualified.
- In domestic and care services, construction, and leather and textile industry, usually Syrian, Kyrgyz, Turkmenistanian etc. migrants' workers are employed. However, especially low skilled workers usually do not have the right to work so they work illegally. Therefore, I am a bit confused and surprised that you were able to result with Turkey being preferred for employment. (I would expect for the illegal workers to not to appear in the statistics)
- I would proceed with the sectors below:
 1. Domestic and care services
 2. Leather and textile industry
 3. Manufacturing
 4. Construction
 5. Agriculture
 6. Trade and hospitality
- I think that the most important skill for work is Turkish language, which is a strong barrier for most migrants. Other skill requirements would include physical strength, house cleaning, cooking, painting, repairing, installation, maintenance, measuring, machinery usage, interpersonal skills, etc.

■ Portugal

The key sectors can be

- Agriculture (especially people from eastern countries and south Asia).
- Small and medium-sized factories in the field of tableware and textiles.
- Outside urban centers (especially people from eastern countries and south Asia).
- Restaurants and hotels (especially people from Brazil and Portuguese-speaking African countries).
- Uber taxi (especially people from south Asia).
- Small businesses and restaurants in their own name (especially people from eastern countries and south Asia).
- Civil construction (especially people from Brazil and Portuguese-speaking African countries, as well as Eastern Europe).
- Cleaning services (especially people from Brazil and Portuguese-speaking African countries, as well as Eastern Europe).



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