



حوار أبوظبي بين الدول الآسيوية المرسلية والمستقبلة للعمالة  
Abu Dhabi Dialogue among the Asian Labor-Sending and Receiving Countries

## Effective Matching Of The Demand For And Supply Of Migrant Workers Between Abu Dhabi Dialogue Countries Of Origin And Destination



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Labour  
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## I. Executive Summary

The Gulf Cooperation Council (GCC) countries have become the world's largest host of temporary migrant workers, with approximately 27 million foreign nationals (or 53 per cent of the total GCC population) sending more than USD 100 billion in remittances in 2022 (World Bank, 2022). Despite multiple crises in the past two decades, such as the COVID-19 pandemic and the 2008 financial crisis, GCC economies have become increasingly resilient, with a projected economic growth rate of 2.5 per cent in 2023 and 3.2 per cent in 2024. While economic growth and diversification investments in GCC countries are central to their long-term development visions,<sup>1</sup> they will also lead to high demand for migrant workers across various occupational sectors due to ongoing skill mismatches and shortages. Despite progress in this area, Abu Dhabi Dialogue (ADD) member states, specifically GCC host and Asian origin countries, have yet to move in this direction in a systematic manner to match labour demand and migrant worker supply. In addition, another important issue yet to be addressed is establishing effective mutual skills and qualification recognition and certification to facilitate the mobility, welfare, and opportunities of migrant workers across various economic sectors, such as the public sector, the private sector, and free zones. Pertinent questions in this area include: In what proportion does the expanding demand for migrant workers in GCC countries reflect the current labour market relevance of skills within the GCC and in Asian countries of origin? How does the lack of mutual recognition and certification of skills affect the Asia-Gulf labour migration corridor?

### a. Labour Demand and Supply of Migrant Workers

- In the post-COVID-19 pandemic context, the GCC economies, particularly the Kingdom of Saudi Arabia (KSA) and the United Arab Emirates (UAE), have maintained a **relatively growing labour demand for low-skilled, medium-skilled, and highly skilled migrant workers across various occupational categories**. In fact, the GCC's changing macroeconomic conditions (i.e., rising hydrocarbon prices, improved labour market regulations, high return on investments, taxation policy and mega infrastructure projects) combined with visa liberalization policies, the extensive transnational recruitment industry, and migrants' desire to return to work in GCC labour markets have significantly attracted domestic and foreign direct investments, resulting in a rise in the demand for migrant workers.
- The continuing **preference for migrant workers in the GCC private sector**, coupled with a **shortage of relatively skilled national workers, poor employment outcomes of vocational training programmes**, and the corresponding low employment benefits (i.e., wages, job security, and other benefits as compared with those in the public sector) to address these skill gaps, fuels the dependency on migrant workers within GCC labour markets.
- According to the GCC private sector, there is an **insufficiently skilled, trained, and certified workforce in the GCC labour market**, particularly in certain sectors, causing GCC employers to preferentially recruit migrant workers in South and Southeast Asian countries.
- Moreover, despite GCC and Asian country recruitment regulations (either prohibiting or limiting worker-paid recruitment costs), migrant workers from South and Southeast

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<sup>1</sup> E.g., Saudi Arabia's Vision 2030, UAE's Vision 2030.

Asia have continued to pay inordinate sums for recruitment, skills testing, training, and certification as part of their deployment process. These migration costs are especially high for low-skilled South Asian workers (World Bank, 2023: 98). In fact, many GCC private sector firms, recruitment agencies, and migrant workers prefer to use visit or tourist visas as an alternative to other forms of regular migration to enter the GCC labour market and to bypass country of origin regulations despite the risks of migrant workers falling into irregular status if a work permit is not sought by the employer.<sup>2</sup> This is also employed as a cost-cutting solution to the high cost of recruitment in the Asia-Gulf migration corridor.

- **GCC localization/nationalization initiatives** that aim to increase the number of nationals in private sector occupations, particularly in Saudi Arabia, UAE, and Oman, **have largely remained in medium-skilled** (i.e., hospitality, administrative) **and skilled** (i.e., finance, health) **occupations**, directly affecting skilled migrant workers employed in GCC labour markets. Yet, despite such GCC localization efforts, the rising turnover rates of skilled migrants migrating to higher-income destination countries reinforce the labour demand for skilled migrant workers across the GCC.
- These movements are tied to **changing migrant worker perceptions of GCC labour markets** due to perceived greater benefits in other high-income destination countries (e.g., pathways to permanent residency, more possibilities for family sponsorship, higher wages, better living and working conditions, etc.).
- While migrant workers have been able to benefit from opportunities in the GCC to upgrade their skills, the rise of East Asian and European-focused recruitment for Asian migrants, coupled with ‘third country’ GCC-based recruiting for other high-income destinations (i.e., Europe, Canada, Australia, New Zealand), presents significant challenges for GCC employers to retain such workers. Transnational recruitment actors, who operate across several countries, facilitate increasingly the mobility migrant workers into European labour markets, particularly the medium and high-skilled.
- These developments are also reflected in the **recent conclusion of bilateral labour migration and mobility agreements between Asian and European countries** (e.g., 2023 India-Italy Mobility and Migration Partnership Agreement and the 2022 German-Indian Migration and Mobility Agreement) focusing on the mobility of skilled workers, business persons, young professionals and students.
- So, while opportunities in GCC labour markets are increasing, the **growing competition for skilled** (i.e., nurses, engineers) **and medium-skilled** (i.e., construction workers, such as steel fixers, masons, and transport drivers) **migrant workers** from other high income destination countries could pose significant challenges for GCC countries in the future.

## **b. Skills Recognition**

- GCC countries have been increasingly establishing their **national qualification institutions and frameworks for both local and foreign workers** (i.e., via onsite licensing equivalency testing and attestations) **for various high-skilled occupations**

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<sup>2</sup> While there are no official GCC immigration data estimates, existing policy and academic reports extensively highlight the use of tourist visas as an alternative migration route for GCC-bound migrant workers (Fargues and Shah, 2017).

(e.g., nurses, engineers, architects, etc.) from Asian countries of origin. However, **low-skilled and medium-skilled occupations** (e.g., construction, care work, transportation, etc.) **are generally excluded**, thus making it difficult for workers in these sectors to transfer their skills and training certification into GCC labour markets.

- **Saudi Arabia applies the Skills Verification System** that assesses prospective migrant workers' knowledge and practical skills prior to migrating for employment. This system has unilaterally imposed a part of the Kingdom's new occupational skill frameworks through the testing of prospective migrants in collaboration, on the basis of bilateral agreements, with certain Asian countries of origin (i.e., Bangladesh, India, Pakistan, and Sri Lanka) prior to leaving for Saudi Arabia.
- There has been **increasing bilateral skills coordination between Asian and GCC countries, although with limited outcomes** due to partial or no implementation. While some GCC countries have managed to sign and facilitate bilateral skills cooperation arrangements to harmonize common occupational frameworks (see UAE-India and UAE-Philippines), these initiatives have not been fully implemented due in part to domestic sovereignty concerns. Nonetheless, they serve as emerging models of bilateral skills collaboration – with room for improvement, particularly in terms of effective enforcement. Bilateral skills recognition arrangements also often have varying policy implications and may result in higher recruitment costs, with the risk that workers will be required to pay these costs.
- In the Asia-GCC migration corridor, however, GCC destination countries and Asian countries of origin have not systematically developed interregional or bilateral labour matching and mutual skills recognition between the host country and countries of origin. While the **ADD has strategically facilitated interregional dialogues and experimented with bilateral pilot projects** between paired ADD host and origin countries in an effort to harmonize skills recognition and certification, these interregional initiatives have had limited success.<sup>3</sup>
- **Regional qualification frameworks are not yet operational to enable the comparison of skills and qualifications, and ultimately facilitate skills recognition** for high-skilled, medium-skilled, and low-skilled migrant workers in comparison to those in other subregions (such as the Association of Southeast Asian Nations - ASEAN and the European Union - EU).<sup>4</sup> The large majority of recognition frameworks are bilaterally determined in the Asia-GCC migration corridor. Despite their central significance, only a small number of bilateral skills recognition agreements have been partially implemented to focus on mandatory pre-departure skills testing for GCC-bound migrant workers.
- While there is a sufficient supply of (potential migrant) labour across various skill levels in most Asian countries of origin that could meet the current GCC labour

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<sup>3</sup> These early inter-regional skills programmes include the following: 'Pilot Project on Skill Development, Certification, Upgrading, and Recognition: United Arab Emirates and Kuwait', and 'UAE-India: Developing a Harmonized Framework for Skill Recognition and Certification'. See respectively [http://www.abudhabidialogue.org.ae/sites/default/files/document-library/Pilot%20Project%20on%20Skills\\_Project%20Document.pdf](http://www.abudhabidialogue.org.ae/sites/default/files/document-library/Pilot%20Project%20on%20Skills_Project%20Document.pdf) and [http://abudhabidialogue.org.ae/sites/default/files/document-library/ADD%20SOM%20India%20UAE%20Skills%20Harmonisation%20Presentation\\_0.pdf](http://abudhabidialogue.org.ae/sites/default/files/document-library/ADD%20SOM%20India%20UAE%20Skills%20Harmonisation%20Presentation_0.pdf). In the case of UAE-India, the ADD succeeded in enabling both countries to conduct joint mapping and harmonization of occupational standards, which are critically relevant for the 2.3 million Indian blue collar workers in the UAE (Khan and Sharma, 2021).

<sup>4</sup> As discussed in Section V below, the South Asia Qualification Referencing Framework (SAQRF) is currently undergoing endorsement. One of the objectives of the SAQRF is to support mobility of workers.

demand, the GCC private sector does not fully trust the process of training or skilling processes within either private or government-run facilities in countries of origin. As a result, **GCC private companies tend to independently conduct their own recruitment, training, and skilling operations** either in the GCC or country of origin. Moreover, due to the lack of regional skills recognition and certification in the GCC, **the private sector has become effectively the sole determinant of the process of skills certification and recognition**. GCC-based private-sector training and certification institutions have capitalized on the increasing certification demands of GCC employers, as well as other employers in high-income destination labour markets given that many GCC employers tend to question the veracity of migrant worker certifications issued by either origin country governments or training centres/companies. Hence, migrant workers end up paying for this service.

- At the same time, employers' refusal to accept certificates in countries of origin, and reluctance to pay additional wages for certification, and/or training costs, leads to **negative consequences for the welfare of migrant workers**.
- Despite these newly acquired certification processes, GCC employers do not guarantee clear financial rewards to foreign workers. This current reality directly empowers GCC employers to determine the material benefits of skills certification, thus making migrant workers vulnerable to financial exploitation.
- Due to the potential risks, i.e., the real or perceived costs of certification, **bilateral agreements involving skills recognition and certification face significant opposition from the private sector in the GCC and other 'powerful lobbying organizations'**, thereby undermining existing bilateral efforts on the intergovernmental level. Most GCC countries have not yet required GCC-based firms to employ a trained, verified, and certified expatriate workforce population (except in 19 occupations in Saudi Arabia's Takamol programme). Instead, GCC-based local and multinational private sector actors (employers and recruitment agencies) have either established their own 'one-stop processes' (i.e., training, testing, certification, etc.) in Asian countries of origin or brought newly recruited migrants 'with the strongest potential' to the GCC to conduct their training. The impact of these actions on education and training systems in ADD countries of origin deserves greater consideration. Therefore, bilateral skills cooperation initiatives and reforms associated with the GCC private sector have become more difficult for policymakers because of the resistance from the private sector and their lobbying power (Hertog, 2014; Malit and Naufal, 2016).

Based on these provisional observations, the ADD could consider taking forward the policy recommendations outlined in Section VII below, in partnership with relevant stakeholders, in particular policymakers in relevant government ministries and agencies and employers' and workers' organizations, as well as labour recruiters, academia, and interested civil society organizations.

## II. Methodology

To examine the complex policy dynamics of Asia-GCC interregional labour markets and skills recognition processes, the study utilized semi-structured interviews with government officials, employers, migration policy experts, representatives of private sector entities (training providers, assessment/testing, and certification), and migrant workers from June 2023 to September 2023, along with field observations and engagements with various actors based in

the UAE, Qatar, Saudi Arabia, Pakistan, India, and the Philippines. The latter three Asian origin countries were selected due to the large share of their migrant workers and existing bilateral skills cooperation with GCC host countries. The study analyzed available bilateral arrangements between ADD member states as well as conducted a desk review of documentation of government policy, independent think tanks, GCC industry reports, international organizations, and newspaper articles. Overall, these research techniques enabled a degree of triangulation of state and non-state policy publications and assessment of the efficacy, contributions, and limitations of existing bilateral skills cooperation and related initiatives in the Asia-GCC labour migration corridor.

### **III. Snapshot of Labour Market Trends in GCC Destination Countries**

Despite the COVID-19 pandemic's disruptive effects, the GCC countries have strategically managed to mitigate the virus's impact on their economies, which has enabled them to achieve a rapid economic recovery (World Bank, 2021; IMF, 2022). The rising prices of hydrocarbons (i.e., oil and gas), a large influx of foreign direct investments (FDIs), the construction of mega infrastructure projects, and the government economic stimulus interventions have directly triggered this economic growth in the GCC, inevitably fueling labour demand in various employment occupations. While GCC countries have systemically attempted to localize specific skilled and medium-skilled sectors, their results have been partial due to the ongoing structural dependence and cost-effective preference for migrant workers. Because of this long-term projected labour demand, many Asian countries of origin have strategically continued to increase economic investments in their national skilling infrastructures and initiatives, with a view to closing existing and imminent skill deficits in the GCC. Yet, despite such initiatives, the GCC private sector lacks trust in existing skills training processes, contending that Asian origin countries have yet to fully deliver 'efficient and effective skill delivery mechanisms, programmes, and partnerships that are responsive to the requirements of migrant workers or employers' (Rakkee, 2017). This section discusses significant demand and supply trends in the GCC labour market, focusing on migrant-dominated sectors in the GCC like construction, care work, logistics, and transportation.

#### **a. Construction**

Construction is one of the consistently migrant-dominated GCC employment sectors, which drives infrastructure projects (i.e., hospitality, transportation, electricity, water infrastructure, new residential and commercial construction) and other major industrial projects. Despite attempts by GCC countries to localize and develop vocational training courses for nationals in the construction sector (specifically in the skilled and medium-skilled occupations), the GCC construction sector has largely remained migrant labour intensive. This growing labour demand in the GCC construction industry was evident during 2017–2022, where the industry anticipated a robust GCC-construction industry recovery with 6.5 per cent growth. During the third quarter of 2021, the GCC sub-region accounted for at least USD 24.7 billion worth of mega-construction projects, accumulating USD 16.5 billion, with the UAE and Saudi Arabia registering the highest growth (see Mordor Intelligence Report, 2023). Saudi Arabia and the UAE account for more than 84 per cent of the GCC construction market. As the leading investor in the GCC construction industry, Saudi state-funded mega-development projects such as Neom and other mega-city projects such as the Prince Mohammed Bin Salman Nonprofit City have also been expanding and are expected to persistently generate a high demand for all

types of skilled (i.e., engineers, architects etc.), medium-skilled (i.e., carpenters, steel fixers, masons), and low skilled construction workers (i.e., labourers) over the coming years.

Similarly, the labour demand for the construction sector in the UAE has continuously grown in recent years due to the multiple mega infrastructure construction projects, such as the Etihad Rail projects and the Gasoline and Aromatics projects. These domestic infrastructure projects have continued to establish UAE as an influential player in the GCC construction industry (Statista, 2023). Due to significant construction advancements and a scarcity of construction migrant workers in the GCC, Saudi Arabia and the UAE have continuously triggered more recruitment for migrant construction workers, predominantly men, to address labour shortages at various skill levels, including skilled professionals, such as engineers, regional design experts, architects, and consultants, and medium-skilled workers, such as plumbers, steel fixers, and carpenters. While there is a local supply of migrant construction workers in GCC labour markets, UAE and other GCC employers prefer to recruit internationally from Asian source countries due to their low-cost nature (i.e., lower wages and benefits) relative to experienced migrant construction workers within the GCC. Regardless of the source of migrant construction workers, the labour demand is projected to increase, as these workers will be critically needed to develop the diverse infrastructural requirements in the GCC labour market.

In contrast, while there is a slowdown in labour demand for migrant workers in some GCC construction projects (e.g., Qatar 2022's recent World Cup mega infrastructure development), other emerging mega infrastructure projects are likely to demand more construction workers. For example, both Qatar and Oman have witnessed the emergence of new mega-infrastructure construction projects. As one GCC-based recruitment specialist highlights, “there are also some cracking [exciting] projects in planning for the UAE, Oman, and Qatar that should retain some of the region’s great talent and most likely attract some to come or return to the region” (Bhatia, 2023).<sup>5</sup> Ultimately, the GCC states’ growing economic diversification plans, combined with their long-term economic visions, directly fuel their consistent labour market demand for migrant construction workers across GCC labour markets.

## **b. Freight, Logistics and Transportation**

In the GCC economies, the freight, logistics, and transportation sector is a critical emergent sector that has become increasingly dominated by migrant workers, exhibiting a rising demand for migrant labour, including for technical and driver positions. The freight and logistics market is anticipated to reach USD 66.61 billion by 2023, expanding at a compound annual growth rate (CAGR) of 5.76 per cent during the forecast period. In 2023, the freight and logistics market will be valued at over USD 47.59 billion. Due to the growing mega infrastructure

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<sup>5</sup> For example, Oman has developed new infrastructure initiatives, such as the Sultan Haitham City, which will house 100,000 low-income Omani citizens. It has also signed major bilateral economic development projects with other GCC countries, such as the USD 3 billion railway network connecting Oman and the UAE and the USD 320 million infrastructure development project with the Saudi Fund for Development, specifically in the Al-Dhahirah Special Economic Zone. These bilateral economic cooperation agreements have the potential to improve Oman’s overall economic infrastructure and drive labour market demand in the Oman construction industries. However, many local Omanis either do not wish to work in the construction sector, or lack training and skills to operate in the construction sector. An ILO (2022) report acknowledges that ‘low-skilled (Omani) nationals tend to gravitate to specific white-collar support positions and may not be willing to work on more elementary occupations (including construction). This country will thus continue to rely on low-skilled foreign workers’ ILO (2022: 23).



initiatives and investments in infrastructure in GCC countries—led by Saudi Arabia—combined with rising oil production, the freight, logistics and transportation sector is expected to grow in the GCC, particularly in Saudi Arabia, where it is projected to account for 10 per cent of the country’s gross domestic product (GDP) by 2030, up from 5 per cent in 2021 (see Mordor Intelligence, 2023).

In addition, the growth rate of wholesale and retail trade and cold chain logistics initiatives are also significant determinants of the expansion of the freight, logistics, and transportation sector. Other social infrastructure projects totaling USD 50 billion are currently being implemented, including government initiatives related to Qatar’s expanding freight and logistics market (USD 2.17 billion in 2022, USD 11.49 billion in 2021, and USD 16.29 billion by 2029) (anticipated revenues) (see Mordor Intelligence, 2023). Because of such sectoral growth and expansion within the GCC, the demand for high-skilled migrant workers in this sector is anticipated to increase because of the GCC’s diversification strategies via logistics and freight through its economy. Despite efforts by GCC countries to localize various specialized sectors, the freight and logistics markets continue to be dominated by migrant workers from South Asian countries, such as Bangladesh, India, Nepal and Pakistan.

### **c. Hospitality and Other Service-Based Sectors**

In the GCC, particularly in the UAE and Saudi Arabia, the hospitality sector is one of the fastest growing sectors in terms of labour market demand, due to the increasing tourism industry and visa liberalization (i.e., umra/hajj visas, Golden visas, Green visas, freelance visas, etc.) for short and long-term residents and visitors in the GCC. Industry findings forecasted a post-pandemic expansion in 2022, with annual growth of 74.8 per cent and total revenues of USD 26.3 billion. Key growth factors, such as rising tourist arrivals in the UAE and Saudi Arabia and alleviation of visa regulations, have positively stimulated demand growth in the hospitality and service sectors (see Alpen Capital, 2022). At the same time, with the rise of short and long-term tourists and residents, there is a concurrent rise of the gig economy, including companies such as Talabat, Deliveroo, and Noon, which have hired increasing numbers of migrant workers, primarily from South Asia (i.e., India, Pakistan) and several African countries. These hospitality and service sector developments in the GCC have increased the demand for migrant workers to levels comparable to before the COVID-19 pandemic. In turn, the demand for low-skilled hospitality migrant workers (i.e., cleaners, room attendants, servers, and housekeeping) and medium- to high-skilled migrants (i.e., chefs, hospitality managers, marketing professionals, etc.) is expected to increase because of the return of high tourism and other long-term permanent settlement reform policies (i.e., golden visa, green visa, etc.) in the GCC. At the same time, the demand for other migrant workers, specifically in the transportation sector (see also above), will likely grow over the coming years due to the rising demand for transportation services within the GCC economy.

### **d. Care Work**

Care employment is an expanding sector of the GCC labour market that has grown steadily over the past decade despite the emergence of the COVID-19 pandemic. In fact, migrant care workers have continuously dominated domestic care work, notably in the domestic, caregiver, and healthcare sectors, due to the GCC’s severe care worker shortages. While some GCC countries, particularly Saudi Arabia, have attempted to localize high-skilled care work

professional categories related to health specialties by 60 per cent (i.e., related to the engineering and technical sectors) to increase local labour market participation, these efforts have mostly yielded marginal results, thereby maintaining the high demand for migrant workers in the GCC care work sector. Other GCC country initiatives have also focused on increasing local wages for their nationals to incentivize them to enter the national labour market. Yet, despite these growing localization efforts, migrant care workers have continued to dominate the GCC sector, given the strong preference for them by GCC employers and the paucity of available skills in the GCC labour market.

#### i. Domestic work

Despite several country of origin bans on women nationals (or women below a specified age) migrating for domestic work to certain ADD destination countries and the COVID-19 pandemic, the demand for migrant domestic workers has increased steadily throughout the GCC. This labour demand is largely linked to the rapid growth of the expatriate population.<sup>6</sup> More specifically, with the influx of high-income expatriate populations (often with extended families), the demand for domestic workers has been increasing, given how they enabled local men and women to enter the labour market, thereby directly contributing to the stabilization of their labor market participation and, more generally, society. The relatively high fertility rate among local and expatriate populations has also contributed to the continued increase in demand for migrant domestic workers. In particular, the reorganization of Gulf countries' family structures, combined with the growing accessibility of domestic work services via cleaning companies, free visas, and private recruitment actors (e.g., *Tad-beer* in the UAE, which is licensed and monitored by the government but operated independently by the private sector), has increased the reliance on migrant domestic workers (Sabban, 2020). Moreover, GCC countries have introduced long-term residency options for high-income expatriates through Golden Visa programmes, allowing them to remain for up to 10 years (renewable). This has increased the likelihood of migrant domestic worker demand as families hire more permanent, long-term domestic workers.

In contrast to the pre-COVID-19 pandemic scenario, the post-COVID pandemic scenario indicates a high demand for migrant domestic workers, including preferences for hiring domestic workers from particular countries.. As one *Tad-beer* agent in Dubai highlighted, 'there's a massive difference between the pre-pandemic and post-COVID-19 pandemic recruitment for domestic workers. Both locals and expatriate populations demand maids, especially those families with pregnancy status who prefer Filipina domestic workers due to their perceived excellent skills in childcare, language, and overall household cleaning performance.'<sup>7</sup> Ultimately, the demand for migrant domestic workers has been greatly augmented by two factors: the lifting of labour bans across the GCC, such as lifting of country of origins bans on Filipina nationals migrating for domestic work in Saudi Arabia and the UAE, and the increasing trend of family migration to the GCC. This demand for migrant domestic work is likely to rise in the long run. The demand for healthcare professionals and care givers in particular has also picked up considerably.

#### ii. Healthcare professionals

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<sup>6</sup> Estimated to have increased by 51 per cent or 18 million people in the last decade (Tayah and Assaf, 2018).

<sup>7</sup> Interview with *Tad-beer* agent (Dubai: July 2023).

In the GCC healthcare industry, the demand for physicians, nurses, laboratory technicians, and other healthcare professionals has continued to rise, even in a post COVID-19 pandemic era, which is in line with global trends. In fact, despite the strong efforts of GCC countries to increase localization initiatives, the lack of domestic high-skilled GCC labour in the healthcare profession has continued to exacerbate existing deficits in the GCC labour market, thereby generating a substantial demand for healthcare migrant workers. In Saudi Arabia, the UAE, and Qatar, the health care profession is experiencing a growing demand for expatriate healthcare professionals. According to industry forecasts, Saudi Arabia and the UAE will account for approximately 80 per cent of the total GCC healthcare expenditures in 2023. Currently, the UAE requires an additional 33,000 nurses by 2030, excluding other categories (nurse assistants, caregivers, etc.) (Abbas, 2023). The labour market demand for nurses, specifically from the Philippines and India, has continued to rise due to the expanding healthcare economy across the GCC region.

### iii. Caregivers

Caregiving has increasingly become a highly demanded profession across GCC countries, largely dominated by migrant workers from the Philippines, India, and other South Asian countries. The key drivers for GCC caregiving include the increasing aging population, shifting disease profiles across the GCC, technology supporting remote monitoring, convenience and comfort at home, and augmentation of bed density and efficiency (Middle East Business Intelligence, 2022). As GCC populations' life expectancy and noncommunicable diseases (i.e., high rates of obesity, heart disease, and diabetes) increase, the demand for cost-efficient migrant caregivers also increases, given the growing preference to provide homecare treatment for patients and sensitive treatment for aging populations with serious health risks (i.e., dementia, orthopedic conditions, and Alzheimer's disease). The rising technological advances (i.e., tele-health, wearables, remote monitoring services, and mobile health applications) have also triggered a growing demand for caregiving work. Given that the COVID-19 pandemic is still ongoing (although no longer considered as a global emergency), many GCC nationals have also increasingly preferred homecare over hospital care as a 'safer alternative' across the GCC healthcare profession (Middle East Business Intelligence, 2022).

Beyond these drivers of labour demand within the caregiving profession, GCC countries have also strategically invested in major infrastructure and social initiatives that have continued to propel the labor demand for migrant caregivers. To meet the increasing demand for home health caregivers, there has been a GCC-wide investment attempt to develop more infrastructure, which has subsequently given rise to a greater demand for migrant caregivers. One study highlights that the 'homecare segment is comparatively easy to enter, requires no capital cost, and mainly requires a workforce pool', thus producing a strategic business opportunity and labor market demands for migrant caregivers (Middle East Business Intelligence, 2022). In the UAE, the Ministry of Health and Prevention (MoHP) offers homecare services for elderly citizens to all UAE nationals, including in the Sheikh Khalifa Medical City in Abu Dhabi and Al Tawam Hospital in Al Ain. Others, like the Abu Dhabi Health Services Company (SEHA), provide a comprehensive package of diverse home care services for senior citizens who do not wish to visit health centres and hospitals. Private health

care providers have also added home healthcare services to their services as a ‘value-added’ service, while others have begun to digitize their homecare services by implementing digital applications like Manzil Home Healthcare, Ayadi Home Healthcare, and others (Middle East Business Intelligence, 2022). In Saudi Arabia, Air Liquide entered the Saudi home healthcare profession with the acquisition of the respiratory division of Thimar Al Jazira Company, which operates a home healthcare division specializing in the distribution of respiratory equipment and sleep disorder diagnostic services.

#### **IV. Matching the GCC Labour Demand? Skill Profiles of Selected Asian Origin Countries and their Labour Supply Dynamics**

Given the complex and shifting GCC labour market demands, the supply and skill levels of the migrant worker population—both those in Asian countries of origin and inside the GCC—are vital to meeting the GCC labour market requirements, as well as their future economic diversification plans. While the supply of migrant worker populations in the GCC exists, the growing skill requirements and competencies appear to be insufficient to close the existing skill gaps in GCC labour markets. However, due to factors such as limited pathways to permanent residence and citizenship, lower wages and weaker social protection mechanisms in the GCC,<sup>8</sup> the interviews carried out for this research indicate that Asian migrants are increasingly exploring other regional labour markets (i.e., East Asia and Europe), which is facilitated by the large recruitment processes operating in the GCC and bilateral agreements.<sup>9</sup> This section focuses on the skill profiles of three ADD origin countries, namely the Philippines (care work and skilled/medium-skilled construction), India (medium-skilled and low-skilled construction and digital IT), and Pakistan (construction and transportation), highlighting their potential to match the ongoing labour market demand in the GCC region and beyond.

##### **a. Philippines**

As one of the leading sources of migrant labour in the GCC, the Philippines has a highly demanded labour force across various occupations, specifically in the areas of care work, construction, and hospitality, with a strong capacity to match the labour demand in related GCC sectors of employment. In the diverse fields of care work, the Philippines employs highly developed occupation standards and frameworks for all prospective migrant workforces, both at the local and international labour markets. While most workers migrate to the GCC due to the low labour admission mobility requirements, a growing post-COVID-19 pandemic trend highlights an increasing migration than before the COVID-19 pandemic towards other high-income destination countries, including Southeast Asia, East Asia, and Europe for all migrant worker skill categories. The mutual skills recognition through bilateral agreements between the Philippines and those high-income destination countries (except the GCC) has enabled stronger labour mobility opportunities for all skill categories of Filipino migrant workers abroad.

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<sup>8</sup> In terms of wages, however, there can still be significant income gains for those migrating to the GCC. For example, low-skilled Indian workers had their incomes surge by 118 per cent in the India-GCC labour migration corridor and by 298 per cent in the India-UAE corridor (World Bank, 2023: 97).

<sup>9</sup> For example, see the 2023 India-Italy Mobility and Migration Partnership Agreement and the 2022 Germany-India Migration and Mobility Agreement (Prime Minister of India, 2023; Federal Ministry of the Interior and Community, 2022).

#### i. Care Sector: Domestic work, caregiving, and nursing

Given the increasing demand for care work in the GCC, the Philippines is in a strategic position to address the skill gaps in the Asia-Gulf migration corridor. In fact, the Philippines government, under the domestic work sector, has set a requirement, whereby Filipino domestic workers must take the Domestic Work National (NC) II Certification Course, unless they prove that they have the requisite years of experience, approved by the Technical Education Skills Development Authority (TESDA) at any of its accreditation centres. While these certificates are not formally recognized by GCC countries, GCC private sector employers fully recognizes these skills and qualification standards, thus allowing Filipino workers to gain an informal advantage in recruitment to and selection in the GCC given their long-standing presence in GCC labour markets. This certification process includes comprehensive skills training for domestic workers as well as information dissemination related to the host country's language, laws, and culture to equip domestic workers to adjust to the host country. Without passing the Domestic Work NC II Certification Course, Filipina domestic workers could not be deployed to destination countries in the GCC and beyond.

In addition, the Philippines government has adopted internationally accredited caregiving occupational standards to address the growing demand in the GCC caregiving sector. Filipina caregivers must pass the Caregiving National Certification (NC) II course, which provides comprehensive training and knowledge in extending quality care for infants, children, senior citizens, and people with disabilities. The qualification training includes fundamental knowledge on personal and hygiene-related needs like taking a bath, changing clothes, medical maintenance, and other related supporting tasks for the patients. Beyond this training approach, which takes up to 234 hours to complete, the Caregiving NC II provides training in proper physical, social, intellectual, and emotional approaches to patients.

Beyond the domestic and caregiving sectors, the Philippines has become a leading origin country that trains and facilitates the movement of high-skilled nurses globally, holding a strong potential to address the current nursing and other healthcare staff shortage in the GCC healthcare sector. Filipina nurses need to complete a four-year bachelor's degree in nursing, complete the related learning experience (RLE) that requires Filipino nursing students to undertake practical training in hospitals, and pass the nursing licensure exam (NLE) administered by the Professional Regulation Commission. Without passing this exam, Filipino nursing degree holders would not be able to become licensed registered nurses, thus impeding their capacity to work as international nurses in destination countries abroad.

Despite the high demand for Filipino nurses globally, specifically in Europe, there is a surplus of licensed Filipino nurses in the country who are unable to access employment. These licensed (and non-licensed) Filipino nurses often opt for the GCC countries as a 'steppingstone' training ground, often with strong economic intentions to migrate subsequently to Europe, North America, and other wealthy destination countries that offer citizenship pathways. While there is no official policy that encourages Filipina nurses to migrate via the GCC to Europe, many recruitment agencies and employers in Europe and North American tend to source from the GCC, given their similar and extensive training in and exposure to a Western-modeled/accredited healthcare system. The current supply of Filipino nurses being deployed to the GCC has the potential to meet the GCC nursing labour demand, given the

increasing high wages, modernized healthcare facilities, and facilitated immigration pathways to many Western developed countries, specifically Canada, the United States, and Australia, and European countries.

## ii. Construction

The construction labour supply in the Philippines also has a strong capacity to fill the ongoing GCC labour demand. Unlike other countries of South Asian origin, the Philippines mainly deploys high-skilled workers (including engineers and architects) and medium-skilled (masons, plumbers, carpenters, and steel fixers) across the GCC construction sector, but they do not deploy low-skilled workers, such as general labourers. Such low-skilled jobs are mainly occupied by migrant workers from South Asia (i.e., from Bangladesh, India, and Pakistan). Despite GCC countries' attempts to localize these construction professions, Filipino migrant workers have continued to dominate these occupations, along with migrant workers from South Asia. Indeed, in 2018, the UAE government signed a bilateral skills agreement with the Philippines, recognizing the Philippines' occupational standards and framework, but this agreement has yet to be fully implemented.

As a key supplier of high-skilled construction workers, the Philippines can therefore address existing skill gaps in the GCC. In terms of relevant qualifications for high-skilled construction occupations (i.e., engineering and architecture), the Philippines imposes a highly restrictive system mandating Filipinos to complete undergraduate degrees in engineering (five years, depending on the subject specialization) and architecture (five years, plus two years of apprenticeship), as well as passing the national licensing exam in their own respective fields. By completing these relevant qualification standards, Filipino engineers and architects would be able to acquire their professional license and meet GCC-based skills requirements for their respective professions. Since the 1970s, many Filipino engineers and architects have developed a long history of migration to the GCC, where they are largely employed and in demand in various construction positions.

Under the medium-skilled construction occupations (i.e., mason, plumber, carpenter, and steel fixer), Filipino workers must have a high school degree and have taken a vocational course in their chosen occupational fields (like carpentry) in either private technical schools or public training institutions. These standardized certification requirements are critical for securing employment abroad as well as meeting the qualification requirements set by GCC-based employers or recruiters.

## b. India

India is the largest migrant labour supplier to GCC labour markets. With an expected 1.5 billion population in 2030, India's working-age population (15–64 years) will comprise more than two-thirds of the total population over the next four decades, making it the 'largest workforce in the world' (UN DESA, 2017). An estimated 12 million young people join the Indian labour market annually, highlighting the huge policy challenge for the Indian government to provide education and training opportunities at home as well as for GCC labour markets. As a result, the Indian government has strategically invested in improving school education, VET, and higher education to 'reap the demographic dividend' linked with India's youthful workforce' (ILO, 2019). With significant shortages of good-quality employment,

many Indians, mainly low- and medium-skilled workers, have migrated to the GCC and other regions (i.e., Southeast Asia) in search of employment opportunities. Like the Philippines, India has deployed diverse migrant occupational categories in the GCC labour markets and has one of the strongest potentials to address ongoing labour market demands in the GCC.

#### i. Construction

Low- and medium-skilled construction workers from India dominate GCC labour markets. Despite GCC countries' attempts to diversify the construction sector, most of the migrant construction population comes from South Asia. The Indian Ministry of External Affairs highlights that an estimated 70 per cent of the Indian population abroad consists of medium-skilled and low-skilled workers, mainly in the construction sector (Mendosa, 2023). With the increasing labour demand in the GCC construction sector, Indian construction workers are highly sought after, and their deployment is facilitated by the robust recruitment industry operating in the India-Gulf corridor, despite the high cost of recruitment and substandard wages. India's construction sector is the second-largest employment source in the country, employing 71 million people in total, of whom 80 per cent are low-skilled workers. 19 per cent of skilled employees (engineers, technicians, clerical workers, etc.) in the construction sector are vocationally trained but are largely absorbed in the real estate sector (Jaswal, 2023). Both high-skilled and low-skilled construction sector workers represent 87 per cent of the workforce in real estate, while 13 per cent are absorbed by the infrastructure sector. India also has approximately 3,200 universities and colleges providing construction-related courses and training (The Economic Times, 2023).

In light of these GCC labour market demands, India is strategically positioned to fill the skill gaps in GCC countries, but Indian skills certificates have yet to be recognized across the GCC. While the presence of low-skilled worker categories will likely continue to dominate the GCC construction sector, GCC countries will likely face critical challenges in accessing high-skilled categories of construction workers (i.e., engineers, architects, etc.). The Indian Ministry of External Affairs has estimated that at least 20-30 per cent of the Indian expatriate population consists of Indian professionals and white-collar workers, including doctors, engineers, architects, bankers, etc. (Mendosa, 2023). With the growing demand in India's economy combined with high recruitment rates for Europe, GCC countries will likely face challenges in securing India's skilled construction workforce. While some of this workforce has moved to GCC countries, many such migrant workers often opt for further migration to Europe, the United States, and Canada due to the available pathways for citizenship and better working and living conditions (Sasikumar and Timothy, 2012). In Europe, the International Trade Union Confederation (ITUC) and European Federation of Building and Woodworkers (EFBWW) estimated that more than two million construction workers will be required by 2030, jobs which Indian migrant workers in India and from the GCC have already started to opt for (Mella and Werna, 2023). While GCC employers may be able to access such a skilled construction workforce to address their skill gaps in the short term, the long-term dynamics of human capital attraction and retention for a skilled Indian construction workforce may pose serious disadvantage for GCC states, since Indian migrant workers will continue to be aggressively sought out by labour markets in other regions.

#### ii. Digital IT sector

Over the past decades, India has dominated the logistics and IT sectors across GCC countries. With their longstanding demands in the GCC, employers have continued to rely on Indian migrant workers. Given the increasing demand for IT and logistics in the GCC, India is in a strategic position to address this demand, including from the existing Indian migrant workforce living and working in the GCC. Indeed, the India Skill Report 2023 suggests that the overall employability rate in these sectors among young working populations has increased from 46.2 per cent in 2022 to 50.3 per cent in 2023, while, more specifically, the employability rate for artificial intelligence and machine learning stands at 48 per cent. Other cutting-edge technology sectors, including backend development, data science, data analysis, and QA automation, note an employability rate of 39 per cent (India Skills Report, 2023). While this signals a vital supply for this demand in GCC labour markets, the thriving digital IT industry markets in India and other destination countries, specifically in the United States, Southeast Asia, and Europe, clearly pose a greater threat to the potential supply for GCC employers in the long run (India Skills Report, 2023).

### **c. Pakistan**

Pakistan is also one of the largest origin countries of migrant labour in the GCC. Of the estimated 8.4 million overseas Pakistanis in 2021, 53 per cent were living and working in GCC countries (Shah et al., 2022: 8). With more than 227 million people, Pakistan has a youthful population, of which 63 per cent are under the age of 30, thus acting as a demographic window of opportunity for the country. Unlike the diverse occupational skill categories in the Philippines and India, Pakistan's migrant skilled workforce profile is largely focused on medium- and low-skilled sectors, mainly in the fields of construction. In GCC labour markets for the years 2019–2021, Shah et al. (2022) found that Pakistani migrant workers were employed in five leading occupations, including labourer (40%), driver (31%), mason (20%), technician (4%), electrician (3%), and others (2%). However, while the Pakistani government has attempted to expand access to education and TVET programmes for the local population, less than six per cent of young people have acquired technical skills through the TVET system, and only 2.5 per cent have received any type of on-the-job training. Over 60 per cent of the country's labour force has a primary level of education or less, thus posing a significant disadvantage with low educational attainment and limited skill sets (ILO, 2020).

While the Pakistani government has developed various training provisions, including 3,740 training institutes with 18,2017 trained teachers in the formal TVET sector for 437,000 registered places available, there is still a huge shortage of educational training programmes within the TVET sector, placing Pakistani populations at a disadvantage, particularly women, with a literacy rate of only 49 per cent compared to 70 per cent for men (ILO, 2021a). To make Pakistani migrants competitive in GCC labour markets, the Pakistani government has developed the National Skills Strategy, the National Vocational Qualifications Framework, and the National TVET Policy to set qualification standards for current and aspiring migrant workers seeking to work locally and abroad. Yet, Shah et.al (2022: viii) found that 'Pakistan has made hardly any progress in improving the skill level of its migrant workers during the last five decades [...] If skills are not enhanced soon, Pakistan workers will lose to other South and Southeast Asian migrants competing for Gulf jobs.'

#### **i. Construction**



With the growing demand for construction workers in the GCC, Pakistan has the capacity to meet the demand for the low-skilled but not the high-skilled construction migrant workforce. A significant challenge faced by builders in Pakistan is the shortage of high-skilled labour. According to the Pakistan Labour Force Survey in 2021, there are 4.7 million workers employed in the local construction sector, the majority of whom are engaged in informal work. This sector is not only considered ‘insecure’, but also a vulnerable form of employment in Pakistan, given the lack of rigorous training, testing, and certification standards in the country.

As a result, Pakistan faces a skills shortage locally since it does not have a high-skilled workforce in the local labour market. Instead, the vast majority of Pakistan’s construction workforce is low-skilled, which is highly likely to be sufficient to address not only the quantity but also the quality of labour supply requirements in the GCC. Because of this skills crisis, many GCC employers travel to Pakistan and conduct their own recruitment and assessment, selecting those with ‘most potential’ to work in the GCC.<sup>10</sup> Others, however, recruit Pakistani construction workers with some prior construction work experience via tourist visas and then train them in their own existing facilities in the GCC in order to address upgrade their skills and competences.<sup>11</sup> This particular Pakistan-GCC recruitment dynamic became the foundation for the ADD UAE-Pakistan pilot project in 2014, which aimed to test the certification, skills testing, and qualification of UAE-bound migrant workers. However, the project does not appear to have been institutionalized and thus has yet to achieve its goal of mutually recognizing the Pakistani skills qualification and certification framework.<sup>12</sup> As a result, the lack of institutional trust in the skill quality of the Pakistani construction workforce—similar in the case of other South Asian countries (Bangladesh, India, Nepal, Sri Lanka)—has triggered GCC employers to strategically conduct the actual training, testing, and certification process in the GCC to avoid costly, repetitive recruitment processes.

## ii. Transportation

Pakistan’s skill supply has the potential to meet the growing labour demand in the freight and logistics sectors in the GCC. Currently, Pakistani migrant drivers dominate the transportation sector in the GCC, operating heavy transport (buses, trucks, trailers, cranes, etc.), light transport (commercial taxis, cars, jeeps, minibuses, etc.), and public service vehicles, among others. Despite the potential for Pakistani workers to meet these labour market demands; Pakistan’s driver qualification standards are not recognized in GCC countries. While Pakistani national are required to complete multilevel written and practical tests to assess their driving knowledge and ability in their own country, GCC countries do not recognize Pakistan’s and other ADD origin countries’ licensing qualification standards, forcing many Pakistani nationals to enter the GCC on visitors or tourist visas and take the licensing exam to become a driver in the category of vehicle in question. Frequently, they take out personal loans from family and friends to pay for the migration process and licensing exam to become drivers, including in the gig economy. Due to the high cost of recruitment, many Pakistani migrant drivers opt for tourist visas through social ties (i.e., acquaintances and family members) in order to facilitate

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<sup>10</sup> Interview (Zoom: July 2023).

<sup>11</sup> Interview (Islamabad, Pakistan: July 2023).

<sup>12</sup> ADD Pilot Project on Skills Development, Certification and Recognition (Skills Project Phase I: India; Skills Project Phase II: Pakistan).

[http://abudhabidialogue.org.ae/sites/default/files/document-library/2018\\_Sri%20Lanka\\_%20ADD%20SOM%20-%20India%20and%20Pakistan%20Skill%20Pilots.pdf](http://abudhabidialogue.org.ae/sites/default/files/document-library/2018_Sri%20Lanka_%20ADD%20SOM%20-%20India%20and%20Pakistan%20Skill%20Pilots.pdf)

their migration to GCC countries as drivers. While this migration practice is considered contrary to exit requirements in several ADD countries of origin, immigration systems internally allow tourist or visitor visa holders to convert their visa status to employment upon arrival in most GCC countries.

## **V. Processes of Matching the Supply and Demand, and Skills Recognition for Migrant Workers in the Asia-GCC Migration Corridor**

### **a. Key Actors and Institutions**

At the level of the ADD, the process of matching supply and demand and skills recognition for migrant workers has remained challenging for policymakers, given the lack of information in countries of origin on skills needs in GCC labour markets, competing occupational standards, frameworks, interests, preferences, and constraints. Multiple state and non-state actors and institutions play a central role in governing the process of matching supply and demand, as well as the skills recognition for migrant workers in the Asia-GCC labour migration corridor. At the GCC level, labour and education ministries, and their respective national and subnational labour institutions, such as Takamol (Saudi Arabia) and the National Qualifications Center/Abu Dhabi Quality Conformity Council (ADD-QCC) (UAE), play a vital role in issuing work permits, and setting national labour standards, skills, and qualification frameworks. At the level of ADD Asian countries of origin, labour and education ministries, and their respective subnational institutions, such as the Ministry of Skills Development and Entrepreneurship (India), the Technical Education and Skills Development Authority (TESDA) (Philippines), and the National Vocational and Technical Training Commission (NVTTC) (Pakistan), play a regulatory role in technical education, vocational training, and qualification frameworks.

Beyond ADD member state actors, private sector entities, specifically in the fields of recruitment, training, assessment/testing, and certification, in both ADD origin and destination countries and beyond, have played an important role in developing an effective matching process for supply and demand and skills recognition for migrant populations in the Asia-GCC labour migration corridor. At the GCC and Asian origin country level, major certification and assessment private sector actors, including City and Guilds, GIZ (Germany), Aspiring Minds, Takht, and others, have played a role in helping ADD member states define skills qualification frameworks and standards, specifically in the construction industry. Local and multinational GCC-based employers, who mostly employ migrant workers across various sectors, play vital roles. Other GCC-based for-profit training, assessment, testing, and certification companies have also emerged, providing short-term certificate or diploma programmes in various fields, including caregiving, hospitality, health and safety, and other service-based programmes, which are increasingly in demand in GCC labour markets. While some of these programs are partially accredited in origin countries, they have yet to be recognized by GCC governments within their national qualification frameworks. Ultimately, the lack of a centralized harmonization of mutual skills qualification and recognition frameworks between the Asian origin and GCC countries has led to the proliferation of multiple private enterprises. This also reinforces the urgency of effective matching and skills recognition for migrant workers at the interregional level.

In Asian countries of origin, government and private-sector-run entities involved in recruitment, training, assessment/testing, and certification also exist, often promising a highly trained, skilled workforce for international deployment. However, despite the extensive investments of Asian origin governments and private sector providers, GCC-based employers tend to continuously question the overall quality, performance capacity, and effectiveness of these origin-country-based training programmes. As a result, while some GCC employers directly recruit from Asian countries of origin (e.g., in Pakistan and India), others prefer to use available tourist migration channels to transfer recruited migrant workers to their GCC facilities for the purpose of extensive training. Such a practice is likely to have an important impact on recruitment costs, particularly if migrant workers are required to pay for the training. Overall, despite the extensive bilateral coordination between and among these ADD state and non-state actors, the interregional harmonization of skills and qualifications, and certification in the Asia-GCC corridor has yet to fully materialize.<sup>13</sup>

## **b. Bilateral Initiatives**

To systematically address the process of ‘effective’ matching of the supply and demand, as well as the skills recognition of migrant workers in the Asia-GCC labour migration corridor, multiple bilateral pilot initiatives have been launched. This paper specifically focusses on the UAE-India (2013-2018), UAE-Philippines (2014-2018), and Saudi Arabia – India initiatives (2023-present) to illustrate the ongoing progress and challenges faced by ADD member states in developing a harmonized framework for skills matching and recognition in the Asia-GCC corridor.

### **i. UAE-India**

Between 2013 and 2018, the UAE government initiated a bilateral pilot project to examine the prospects of harmonizing the existing framework for mutual skills recognition and certification between the UAE and India, specifically in the context of migrant workers in the construction industry. In April 2018, the UAE and Indian governments further announced a Skills Harmonization Partnership to systematically develop a ‘harmonized skills ecosystem’ (ADD, 2019). Under this bilateral initiative, the UAE and Indian governments’ respective agencies responsible for the bilateral project—namely the Abu Dhabi Quality and Conformity Council (ADQCC) and the National Skills Development Corporation (NSDC)—decided to conduct a Phase 1 ‘Joint-Mapping’ of UAE-Indian Qualifications Frameworks, resulting in 13 out of 16 ADD QCC Occupational Terms equivalently mapped to 15 NSDC Qualification Packs, including mostly in the field of construction (i.e., electricians, masons, painters, engineers, welders, repairers, technician, and among others) (ADD, 2023). To achieve this objective, the ADQCC and the NSDC benchmarked processes to review and align comparable occupational standards using three criteria, namely sector, knowledge skills, and performance. These selected mapping outcomes are publicly available on the ADD website and are expected to be rolled out in other sectors, including healthcare, tourism, hospitality, security, domestic work,

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<sup>13</sup> ‘The Pilot Project on Skill Development, Certification, Upgrading, and Recognition: United Arab Emirates & Kuwait’, [http://abudhabidialogue.org.ae/sites/default/files/document-library/Pilot%20Project%20on%20Skills\\_Project%20Document.pdf](http://abudhabidialogue.org.ae/sites/default/files/document-library/Pilot%20Project%20on%20Skills_Project%20Document.pdf).

retail, and future technologies; however, no further developments have been announced since 2019.<sup>14</sup>

The ADDQCC has yet to harmonize these selected and jointly mapped occupational standards and recognized Indian qualifications. Recently, however, the UAE-Indian government agreed to develop a ‘comprehensive institutional framework for engaging all relevant stakeholders to scale up skills-based cooperation between the two nations’ (The Economic Times, 2022). Indeed, the recent UAE-India bilateral skills dialogue highlighted the India-UAE ‘, specifically the recognition of certificates issued by Indian Skilling Centers in the UAE and renewal of government-to-government mechanisms between the Ministry of Skills Development and Entrepreneurship, India, and the National Qualifications Center, UAE, for ‘liberalizing the process of assessment and certification of the Indian workforce and [...] greater mobility for them’ (The Economic Times, 2022). While these initiatives have yet to be implemented in the India-UAE labour migration corridor, they have a strong potential to bolster labor mobility, productivity, and other economic benefits for the certified Indian migrant workforce in the UAE (The Economic Times, 2022).

While the UAE-India bilateral pilot initiative has successfully enabled both countries to develop a deeper understanding of their mutual skills qualification and recognition frameworks, they have yet to achieve official mutual skills recognition at either the bilateral or regional levels. The joint mapping of UAE and Indian qualifications is an important step in developing benchmarking exercises for occupational standards in both countries. However, the UAE and Indian bilateral pilot initiative has yet to systematically progress in developing common qualification standards for these selected occupations. In particular, the UAE government has yet to fully recognize existing Indian skills qualification frameworks, specifically in the construction industry and others, although ongoing bilateral talks have been discussing how to further harmonize existing assessment and recognition frameworks for Indian workers in the UAE. While the UAE-India bilateral pilot initiative has achieved several notable successes (i.e., joint mapping and the issuance of skills passports to selected Indian migrant participants in the ADD India-UAE pilot project), the issue of mutual skills recognition has yet to be fully addressed, and the overall impact of the UAE-India bilateral skills agreement has yet to impact these processes at the ADD interregional level.

## ii. UAE-Philippines

In 2015, the Philippines and UAE governments—represented by the Philippines TESDA and the UAE NQA authorities—jointly explored and, eventually signed in 2018, a bilateral cooperation memorandum of understanding (MOU) on technical, vocational, education, and training (TVET) between the two countries across various sectors, including construction, hospitality, and other service-related occupations (Bie, 2018). The main premise of the UAE-Philippines bilateral skills cooperation is that ‘certifications done by TESDA in the Philippines will be recognized here in the UAE’ including all occupational sectors under the Philippines TESDA system (Bie, 2018). As one Filipino official highlighted, ‘we can learn

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<sup>14</sup> ‘UAE-India: Developing a Harmonized Framework for Skill Recognition and Certification’, ADD Senior Officials’ Meeting, 30 April 2019: [http://abudhabidialogue.org.ae/sites/default/files/document-library/ADD%20SOM%20India%20UAE%20Skills%20Harmonisation%20Presentation\\_0.pdf](http://abudhabidialogue.org.ae/sites/default/files/document-library/ADD%20SOM%20India%20UAE%20Skills%20Harmonisation%20Presentation_0.pdf).

from them, and they can learn from us. The Philippines and the UAE can learn from each other with this agreement' (Bie, 2018). This MOU is significant because it allows both countries to mutually recognize their skills qualification and certification systems, and effectively match the supply and demand of migrants, potentially using their joint institutional frameworks to control the quality of the UAE's workforce. This bilateral skills cooperation has the potential to strengthen the internal labour market mobility, productivity, and wages of Filipino migrant workers of diverse skill levels, specifically in the fields of nursing, engineering, domestic work, and other service industries as well as meet the UAE labour market demands in the private sector.

However, despite the significant progress and promise, the UAE-Philippines mutual skills recognition has not yet been implemented by the respective authorities since it was officially announced in 2018. As one Filipino official noted, 'we have yet to hear from the UAE government authorities. We believe that this mutual skills recognition can greatly allow both countries to optimally benefit from the rigorous training and certification processes in the Philippines. It can also address the demand requirements in the UAE since most Filipinos across skill levels are demanded.'<sup>15</sup> Similarly, another GCC-based migration researcher highlights that even if the Philippines does not obtain mutual skills recognition in the UAE, employers still respect Philippine-trained certificates: 'Filipinos have worked here since the 1980s, and they know the quality and competency of Filipino migrant workers, so mutual skills recognition is important but not the determining factor for hiring our workers'.<sup>16</sup> While the UAE-Philippines mutual skills recognition initiative operated outside the official ADD pilot skills initiatives, it became an important bilateral milestone because it attempted to address bilateral skills cooperation between origin and host states within the ADD and succeeded through the conclusion of the MOU in 2018. However, further cost-benefit analysis studies are still needed to examine GCC countries' institutional resistance to the actual implementation of mutual skills recognition agreements and pilot initiatives within the Asia-GCC labour migration corridor.

iii. Saudi Arabia-India  
حوار أبوظبي بين الدول الآسيوية المرسلية و المستقبلة  
Abu Dhabi Dialogue among the Asian Labor-Sending and Receiving Countries  
The Saudi Arabia and Indian governments have also bilaterally attempted to recognize and regulate the skills of Indian migrant workers bound for Saudi Arabia. In 2022, Saudi Arabia and India signed a bilateral agreement to implement the Skills Verification Program (SVP), a Saudi-based initiative launched in March 2021, in cooperation with the Technical and Vocational Training Corporation (TVTC), to 'verify that all high-skilled workers in the Kingdom have the required skills to execute the requirements of the job that they were recruited for' (Arabian Business, 2022). The newly implemented SVP specifically mandates Indian nationals (as well as other South Asian migrant workers) seeking employment in Saudi Arabia to undergo a 'skills verification exam (practical and written) at a cost of USD 80 per test taker—paid by the migrant worker—prior to securing an employment visa for Saudi Arabia. This policy is currently targeted at 19 occupations, including plumbers, pipe fitters, welders, building electricians, automotive electricians, underwater welders, flame cutters, electrical transformer assemblers, electrical panel assemblers, and drilling ring electricians, among others (Khaleej Times, 2023). This initiative is particularly significant because it is the

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<sup>15</sup> Interview with Filipino official (Zoom: August 2023).

<sup>16</sup> Interview with Filipino official (Zoom: August 2023).

first multiple bilateral skills policy initiative in the Asia-GCC labour migration corridor that links certification through the passing of practical and written tests to an employment visa. While the UAE government initially envisioned such a bilateral policy process in previous ADD senior officials' and ministerial meetings, Saudi Arabia became the first GCC country to formally institutionalize such a concept as part of its broader regional and global attempts to innovate its domestic labor market system.

While Saudi Arabia's SVP attempts to control the quality and labour market relevance of skill supply via mandatory testing in India, field interviews suggest that some recruitment companies only test migrant workers in written exams but not in practical exams. This test is important to note because it is mandated by the SVP. As one private training and assessment company put it, 'there are many issues in the new [SVP] initiative, including the rigour of the testing. Many Indian construction workers only take the written theoretical tests, not the actual practical tests linked to their sector'. Fieldwork interviews with recruitment agencies, however, indicated that some migrant workers pay others to take the tests for them or the testing centres to help them pass the written theoretical tests for the construction sector: 'The worst part is that other Indian accredited testing companies do not practically test [migrant] skills, specifically in their fields like carpentry, plumbing, and electricians. You need to test these workers in an actual facility similar to the conditions in Saudi Arabia to make them competitive. Otherwise, you are not really controlling the quality of the prospective migrant workforce bound for Saudi Arabia'.<sup>17</sup> Other employers acknowledge that, despite the newly imposed mandatory testing, Saudi-based employers still do not trust the new process. As one employer acknowledged, 'yes, there is a new process for testing for Saudi-bound Indian workers, but we will rely on our own recruitment and testing processes to drive our own selection process. We have existing processes, and we know how to source our high-skilled workers. The training is also very poor in India, so we have to do it ourselves here'.<sup>18</sup> Thus, while the bilateral assessment infrastructure has been put in place, the ongoing lack of trust in the quality of training and testing implementation in India has continued to raise serious collaboration challenges, which could potentially also explain the ongoing limited bilateral skills cooperation in the India-GCC migration corridor.<sup>19</sup>

Abu Dhabi Dialogue among the Asian Labor-Sending and Receiving Countries  
While the new bilateral policy directly addresses the importance of effective matching in the Saudi Arabia-India corridor, others have raised concerns about the high cost of the mandatory tests imposed on prospective migrant workers in Saudi Arabia. As one respondent highlights, 'USD 80 is a significant amount of money, and this fee is often charged to workers either directly or indirectly by the recruitment agencies. This is a huge cost that is greatly added to the existing recruitment cost of migration. Migrant workers pay these testing costs, and it just makes migration more costly for them'.<sup>20</sup> More importantly, despite the official certification via the Saudi Takamol system, this initiative does not guarantee higher wages for Indian and other South Asian migrant workers. In this regard, it should also be noted that to date Saudi Arabia does not have a minimum wage policy in business sectors. While more studies are empirically needed to review the impact of the SVP to date, existing field interviews suggest that prospective migrant workers bear the mandatory testing costs, which raise critical issues related

<sup>17</sup> Interview with recruitment agency (Zoom: July 2023).

<sup>18</sup> Interview with Saudi-based employer (Zoom: July 2023).

<sup>19</sup> See also the State of Skills: India country brief (2020), which recognizes poor quality of training and low employability of graduates as one of the key challenges.

<sup>20</sup> Interview via Zoom: July 2023.

to effective monitoring and regulation over certain recruitment practices in the Saudi Arabia-India migration corridor, including compliance with international labour standards.<sup>21</sup> Ultimately, while Saudi Arabia's SVP highlights the growing bilateral cooperation between destination and origin countries within the ADD corridor, to date migrant workers appear to have received few benefits from the existing SVP arrangements.

### **c. Emerging Skilling Initiatives in the Asia-GCC Migration Corridor**

To address the limited bilateral and interregional skilling and certification standards, various government and private sector actors in the Asia-Gulf labour migration corridor have attempted to launch skilling initiatives (both for profit and non-profit) in order to increase the competitiveness of migrant workers and address the growing labour shortages in GCC labour markets. Several interesting initiatives governed by various state and non-state actors within the Asia-Gulf labour migration corridor are described below.

#### **i. Philippines TESDA-Department of Migrant Workers Skills Recognition and Certification Collaboration in the Middle East**

Due to the significant share of Filipino migrant workers residing in the Asia-GCC corridor, the Philippines government Technical Education and Skills Development Authority (TESDA) and the Department of Migrant Workers (DMW) took the initiative to establish an assessment and certification programme for Filipino migrant workers in the GCC and other Asian destination countries, such as Singapore, in 2014. Hosted within the Philippines diplomatic missions, the primary aim of this interagency collaboration is to evaluate and validate the abilities, skills, and knowledge of migrant workers, either previously acquired or currently possessed, with the purpose of enhancing their competitiveness, mobility, productivity, and well-being within the host country. While the initial aim of the programme was to upskill domestic workers, specifically those in irregular status, the Philippines TESDA/DMW quickly expanded the assessment and certification programme to all Filipino migrant workers abroad. Specific qualification assessments have been implemented in certain occupations, including caregiving, hospitality, culinary occupations, domestic work, electricians, photography, events management, computer administration, telecom OSP installation, barbering, physical therapy, architecture, and graphic design. Of the 5,976 Filipino migrant workers assessed between 2014 and 2023, 84.2 per cent became certified by TESDA in GCC and other host countries.<sup>22</sup> These figures mainly capture the certification rates of GCC-based Filipino migrant workers, who were not certified in the Philippines prior to migrating to the GCC.

According to officials and migrant workers interviewed for this research, these Philippines government agencies have been able to extraterritorially expand the Philippine certification process for non-certified Filipino migrant workers who have obtained better employment and mobility opportunities both in the GCC and elsewhere. While the GCC governments (except the UAE, which signed the bilateral skills MOU with the Philippines discussed) have not fully

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<sup>21</sup> Both the ILO Private Employment Agencies Convention, 1997 (No. 181) (Article 7(1)) and the ILO General Principles and Operational Guidelines for Fair Recruitment and Definition of Recruitment Fees and Related Costs (2019) (Principle 7) prohibit the charging of recruitment fees and related costs to workers. Costs for skills and qualification tests in the recruitment process are viewed as costs related to recruitment.

<sup>22</sup> Calculation based on data provided by a Philippines TESDA official during a Zoom interview on 20 August 2023.

recognized the TESDA certifications, GCC employers have tended to recognize the Philippine certificate due to the perceived skill and linguistic competence of Filipino migrant workers in the GCC. As one Filipino migrant worker highlights, ‘my friends and I enrolled in the caregiving assessment, and we now work in hospitals, making twice our salary as domestic workers. We need certificates to show our skills. Without certificates, it will be difficult for us to migrate to Canada from Dubai because they look for these requirements’.<sup>23</sup> According to the interviewees, the Philippines domestic upskilling assessment and certification in the host country have not only effectively enhanced the internal labour mobility of Filipino migrants but also provided opportunities to change employment, earn higher wages, and, more importantly, travel to other destination countries with pathways for citizenship.

## ii. *Tad-beer* Domestic Worker Skilling and Recognition

*Tad-beer* is a private sector organization in the UAE, closely monitored by the government through electronic systems, which facilitates the recruitment of and provides training, for migrant domestic workers from various areas of the globe, primarily the Philippines, Southeast Asia, and Africa. While *Tad-beer* centres are not mandated officially to offer skills certifications, due to a lack of confidence in Asian source training centres (i.e., cultural, language, and skills training), some *Tad-beer* institutions have strategically created their own upskilling centres in the UAE as part of their business development plans. For example, Housekeeping Co. in the UAE—an award-winning Emirates Labor Market Award in 2023—have independently developed multilevel training, assessment, and certification for domestic workers using the UK skills qualification standards for care work and certification by the Dubai-based Knowledge Human Development Authority (KHDA). This 12-week module training initiative has enabled Housekeeping Co. to impose UK occupational standards and expertise in the UAE labour market given the lack of an existing occupational qualification framework for caregivers or domestic workers.<sup>24</sup> *Tad-beer* training provides specific upskilling and certification for migrant domestic workers to satisfy the skill requirements of local employers. Additionally, workers from neighbouring Arab countries, such as Lebanon, are retrained to upgrade their skill levels. Due to this initiative, domestic workers are able to travel between ‘sister companies’ in the UAE and beyond, facilitating interregional mobility for migrant domestic workers using their digital online recruitment platform to place migrant domestic workers with various employers or companies operating in the UAE and other partner companies in the Asia-Gulf migration corridor.

## iii. Private Recruitment Training and Certification Centres

Diverse educational and training institutions are proliferating in the UAE to provide certification opportunities sought by both local employers and recruitment/placement agencies in higher-income destination countries. Key Filipino training institutes operating throughout the GCC include the Filipino Institute, FilBrit, and Power Training Courses, providing specialized training and certification for caregivers, bartenders, and other service-oriented occupations. Most migrant workers pay for these private specialized training and certification centres in the GCC, which have been accredited by the Philippine government’s TESDA. Other

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<sup>23</sup> Interview with migrant workers (Dubai: July 2023).

<sup>24</sup> Housekeeping Co, Training for Maids-Nannies-Housekeepers.

<https://www.housekeepingco.com/articles/7615/training-for-maids-nannies-housekeepers>.



migrant workers, primarily from Asia and Africa, are also obtaining these qualifications. Field observations revealed that domestic workers have transformed into caregivers and are now employed in local hospitals and homecare facilities, while others have successfully immigrated to Canada as caregivers. According to one training provider, ‘we send our trained and certified TESDA caregivers from the Philippines to Canada because the Canadian government recognizes our system. This is our asset and our ability to improve people’s lives’.<sup>25</sup> While there is evidence that such local training and certification initiatives have allowed migrant workers to achieve greater internal labour mobility, productivity, and higher earnings within the UAE and other GCC countries, additional research is required to determine the long-term effects of these corporatized certification processes on the future mobility of migrant workers in the GCC.

#### iv. Al Habtoor

Al Habtoor is one of the oldest and pioneering construction companies operating in the GCC. To maintain competitiveness and address skill gaps in the GCC labour market, Al Habtoor draws on both a local and international supply of migrant workers using its advanced skilling infrastructure in the GCC, specifically in the UAE. Indeed, when Al Habtoor facilitates recruitment of construction workers, the group travels to Asian origin countries, specifically to India, Pakistan, and the Philippines, led by the Al Habtoor Recruitment Team. This group facilitates their own independent recruitment, testing, assessment, certification, and deployment, selecting those migrants with ‘potential’. At the GCC level, Al Habtoor facilitates the training of migrant workers and addresses skill asymmetries to meet the skill requirements. Because of such longstanding industry practices, Al Habtoor has strategically managed to develop their own occupational standards and frameworks, which have been verified and reviewed by many international testing institutions, including City and Guilds. These industry standards have also been central in influencing GCC occupational labour standards in recent decades. Ultimately, the GCC-based establishment of skilling infrastructures at Al Habtoor and other GCC- companies (e.g., Multiplex) to address skill asymmetries in GCC labour markets have enabled them to capitalize on the ongoing training and skills recognition shortcomings in the Asia-Gulf labour migration corridor.

#### v. Innovations

Established more than 24 years ago, Innovations is a private, labour recruitment supply-based company in the UAE, which is pioneering multiple pilot initiatives with local Emirati institutions and companies to effectively facilitate the skilling, licensing, and certification of migrant workers from India, Nepal, Pakistan, and the Philippines across various occupations in the fields of transportation, construction, and hospitality. Currently, Innovation is piloting and financing a project with Dubai’s Road and Transport Authority and Belhasa, in cooperation with the Indian NRSDC, training Indian, Nepali, and Pakistani drivers at origin to enable them to quickly acquire UAE driving licenses prior to arrival. This programme was pioneered in 2021 and allows migrant workers to expedite certification processes, using both Emirati and Indian transportation occupational standards.

#### vi. South Asia Qualifications Reference Framework (SAQRF)

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<sup>25</sup> Field interview (Dubai: September 2023).

The development of the South Asia Qualifications Reference Framework (SAQRF) was supported by the ILO and began in mid to late 2020. Following the research and consultation phase, the development moved to drafting and seeking agreement across the South Asian Member States as to the purpose, design and governance of the SAQRF. This latter phase also included a trial referencing activity that included five Member States completing a partial referencing report. The SAQRF members include seven of the South Asian Association for Regional Cooperation (SAARC) Member States: Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, and Sri Lanka.

The SAQRF is in response to:

- The New Delhi Declaration on Education (31 October 2014), which resolved to foster quality education and expand the scope of cooperation;
- The Heads of State or Government 18th Meeting (Kathmandu, November 2014), at which leaders expressed their strong determination to deepen regional integration for peace, stability and prosperity in South Asia by intensifying cooperation;
- The SAARC Plan of Action for Cooperation on Matters Related to Migration, adopted in Kathmandu in May 2016, which endorsed the development of a South Asian Qualifications Reference Framework;
- The ADD, which identified skills recognition as one of four priority areas, in the proposed strategy for cooperation on skills certification in the Asia–GCC migration corridor (June 2017); and the
- The Global Compact for Safe, Orderly and Regular Migration (2018), which contains a dedicated section on investing in innovative solutions that facilitate recognition of skills, qualifications and competences of migrant workers at all skills level.

The main purpose of the SAQRF is to enable the referencing of national qualifications frameworks (NQFs), and therefore comparisons of all types and levels of qualifications within participating Member States' NQFs; focusing on referencing their qualification levels to the levels of the SAQRF and particularly to improve worker and student mobility within and beyond the sub-region. The ILO is the interim Secretariat for the SAQRF.

## VI. Conclusions

- An interregional mechanism for skills recognition between Asian and GCC countries has yet to be developed. However, recent bilateral skills cooperation (UAE-India, Saudi Arabia-India, Saudi Arabia-Pakistan, and others) shows promise for renewed cooperation and dialogue.
- Labour demand across various skill levels has intensified across the GCC, specifically in Saudi Arabia and the UAE, given their Vision 2030 diversification ambitions, rising foreign direct investment, and mega-infrastructure developments across sectors.
- While the high-skilled labour supply in Asian origin countries (i.e., India, the Philippines, and Pakistan) continues to grow, there is a growing trend towards other labour markets (i.e., Europe, Southeast Asian destination countries such as Malaysia and Singapore, and East Asia)—facilitated via bilateral labour agreements or privatized recruitment arrangements—to address increasing labour demands, thus posing direct challenges to GCC employers in the longer term.

- The ‘soft’ nature of some ‘regular’ GCC immigration channels (‘visitor visas’), combined with the lack of GCC or Asian origin country certification and recognition for prior learning skills, can undermine government attempts to manage the skill labour supply from Asian origin countries in terms of data collection and quality control. It also has the potential to negatively impact migrant worker welfare in the Asia-GCC corridor in those instances where visitor visas are not converted into work permits and the worker falls into irregular status.
- There is a strong resistance from GCC-based private sector actors and lobbying bodies to paying for the certification or other skilling infrastructure initiatives due to potential perceived labour market issues (i.e., high turnover rates, higher internal mobility costs).
- While Bilateral Labour Agreements (BLAs) and Memoranda of Understanding (MOUs) attempt to govern the recruitment costs and quality of labour supply, implementation of the existing BLAs and MOUs appears to have resulted in increased recruitment costs and processes for migrant workers in some instances, while not necessarily controlling the quality and labour market relevance of migrant skills via certification, testing, and training (Saudi Arabia-India and other South Asian’ Takamol engagements). Middle-layer recruitment agencies, the origin country’s quasi-government skills training offices, and GCC country institutions tend to shift the certification costs to migrant workers, thus producing more government and private sector revenues than skill supply.
- A more robust and evidence-based justification linked to the ‘business case’ for skilling and upskilling migrant workers across the GCC is necessary, while ensuring that this enhances workers’ rights’ protections and does not result in them paying for recruitment-related costs. However, there have yet to be efforts taken at the regional level to justify this to powerful GCC-based industry actors.
- While there are growing private-sector-led upskilling training and testing infrastructures in GCC labour markets, they are often not recognized by GCC government entities.

## VII. Policy Recommendations

Based on these provisional observations and findings, the ADD could consider taking forward the following recommendations, in partnership with relevant stakeholders, in particular policymakers in relevant government ministries and agencies, and employers’ and workers’ organizations, as well as labour recruiters, academia, and interested civil society organizations.

1. Conduct a comparative mapping of selected priority occupations and competencies in the GCC—both high-skilled, such as nursing and engineering, and medium-skilled and low-skilled, such as carpenters, masons, steel fixers, care workers and domestic workers, and general labour—and examine the different processes of recognition and certification in GCC countries.
2. Undertake a comprehensive analysis of existing migrant skilling programmes and infrastructures, including related recruitment pathways, operating in the Asia-GCC labour migration corridor, examining the diverse skilling types (state, employer, or private company-led), sectors (i.e., care work, construction, service-based), and structures (i.e., modules, length, cost, etc.), as well as their overall implications on migrant workers’ productivity, mobility, and welfare.
3. Conduct a feasibility study to assess different policy options, methodologies and tools (e.g., reference levels, recognition agreements, joint standards, quality assurance agreements) to facilitate comparison and recognition of skills and qualifications in the

Asia-GCC labour migration corridor, with a view also to moving towards harmonization of qualifications to ensure that each qualification reflects the occupational profile (i.e., what a worker should know, understand and be able to do) and the learning outcomes (i.e., what the holder of the certificate/diploma is expected to know, understand, and be able to do).

4. As part of this feasibility study, carry out a mapping and review of existing qualifications frameworks and systems, occupational and competency standards and competency levels in GCC countries and also those of major ADD countries of origin to identify skills and occupations relevant for developing regional standards in priority occupations for migrant workers from the region.
5. The ADD could consider undertaking further joint mapping and development of occupational standards of the priority sectors and occupations in demand in the GCC by pairing GCC and Asian origin countries, building on the existing Philippines-UAE, India-UAE, and South Asian-Saudi Arabia bilateral skills initiatives. The outcome of this exercise should be shared with skills authorities and other skills recognition agencies across the region to inform skilling, upskilling and skills recognition in both ADD countries of origin and destination.
6. Review and examine the existing diverse types of bilateral skill cooperation agreements (full, partial, and non-enforced) in the Asia-Gulf labour migration corridor and the impact of their implementation on prospective migrant workers' welfare and mobility outcomes.
7. Link GCC-based accredited private sector employers with accredited one-stop shop centres in Asian origin country locations (either government or private-sector run institutions) to guarantee skilled, certified, trained, and assessed migrant workers. This inter-regional initiative could be facilitated by the ADD Permanent Secretariat.
8. Work towards ensuring greater coherence between skilling and certification processes and immigration policies to streamline the admission of skilled workers into GCC countries.
9. Develop an annual skills matching and skills gaps report, to be prepared under the auspices of the ADD Permanent Secretariat, offering insights from multiple actors (i.e., GCC labour ministries, private sector actors, and GCC regional job site providers such as Bayt.Com and Gulf Talent) to systematically identify the skill requirements, as well as the actual GCC labour market demand and Asian origin country labour supply within the GCC.
10. Facilitate knowledge sharing between senior officials on skills matching and recognition for migrant workers between the ADD and other subregions (i.e., ASEAN, European Union) to identify existing and future challenges, modalities, and practices in the Asia-GCC labour migration corridor.
11. Develop guidelines for a cost-sharing policy at the ADD that would mandate employers to pay or share and explore innovative means to cover the cost of skills and training certification in the GCC.
12. Examine the utility and cost-effectiveness of developing an international skills passport, recognized by the competent authorities in GCC destination and Asian origin countries, to ensure that all migrant workers have their credentials, skills, and competencies verified by accredited third party agencies before documentation is submitted for visa processing.

13. Explore interregional labour mobility for skilled and medium-skilled sectors by systematically linking GCC regional employment sites (Bayt.com, Gulf Talent, Indeed.com, etc.) with accredited employment centres in Asian origin country locations.



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