



This Project is led by
Government of the
People's Republic of Bangladesh



Funded by
the European Union



Implemented by
IOM

Labour Market Research for International Migration

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Human Development Research Centre

humane development through research and action

www.hdrc-bd.com

Dhaka February 2021

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Dedication

To all people of the world
experiencing the most challenging time in history
caused by COVID-19 Pandemic

Acknowledgements

From a very forward-looking approach, the Government of Bangladesh (GoB)—particularly the Ministry of Expatriates' Welfare and Overseas Employment (MoEWOE)—initiated this ambitious study to explore new destinations for Bangladeshi workers. Without the keen interest and generous support from this esteemed Ministry's concerned officials, the successful visit and primary data collection would not have been possible in the three prioritised countries: The Co-operative Republic of Guyana, The Republic of Kenya, and The Republic of Tajikistan.

First of all, we express our indebtedness to Mr Imran Ahmad, MP, Honorable Minister of MoEWOE, for his kind cooperation towards this study.

We are indebted to the Honorable Secretary of MoEWOE— Dr Ahmed Munirus Saleheen, for his proactive support. We thank Mr Salim Reza, Dr Nomita Halder and Ms Rownaq Jahan, all former Secretaries to this Ministry, for their cooperation at different stages of this study.

Among many others in the Ministry, our sincere gratitude to Mr Md Nazibul Islam, Mr Md Shahidul Alam, Ms Khadiza Begum, and Ms Shabiha Parvin, Additional Secretaries of the MoEWOE, for their kind cooperation at different stages of this study. We are grateful to Ms Nasreen Jahan and Mr Md Fazlul Karim—Joint Secretary of the Ministry—for their valuable guidance towards the research work. We express our gratitude to Dr Nurul Islam, Director of BMET, for his valuable inputs.

We gratefully acknowledge the all-out cooperation extended by Prof Dr Mohammad Anwar Hossain, Mr Shaikh Muhammad Refat Ali, and Mr Md Aminur Rahaman, Deputy Secretaries of the MoEWOE. We thank Mr Md Jahirul Islam, Director of Wage Earners' Welfare Board and Mr Ariful Haque, Deputy General Manager-BOESL, to contribute to the data collection phase's successful conduct.

We thank Mr Mohammad Shaheen, Mr Md Samsul Islam, and Mr Abed Ali – Deputy Secretaries. We also thank Ms Naima Afrose Ema, Senior Assistant Secretary of MoEWOE.

We are grateful to Mr Arif Ahmed, who served as the Deputy Secretary in this Ministry and Focal Point to this study, for his continuous support in all the research stages.

International Organization for Migration (IOM) Bangladesh—under the project "Bangladesh: Sustainable Reintegration and Improved Migration Governance" funded by the European Union (EU)—has been generously supporting GoB in facilitating this study. In this regard, we are grateful to Mr Giorgi Gigauri, Chief of Mission, IOM Bangladesh, for his keen interest in this work. We are particularly thankful to Ms Shahreen Munir, Head-Migration Governance Unit, IOM Bangladesh, for her invaluable inputs from the very inception of the study. We thank Mr Md. Mazharul Islam of IOM Bangladesh for his cooperation-in-continuity towards this work.

We thank Mr Shameem Ahmed Chowdhury Noman, Secretary-General of BAIRA for his valuable contributions in understanding the potentials of public-private partnership in labour migration.

We thank the GoB and IOM colleagues for their valuable feedback on the draft report, which helped us immensely in finalising this study report. We thank all the Validation Workshop participants in the MoEWOE on 18 October 2020 for their essential discussion and valuable opinion.

We express our deep sense of gratitude to the IOM Missions in Kenya, Tajikistan, and Guyana to extend their unstinted support during the country-level data/information collection and develop the very tight but efficient schedule for the interviews and meetings in those countries. From IOM Kenya, the research team is particularly indebted to Ms Dimanche Sharon, Chief of Mission; Mr John K. Njoroge, National External Relations Officer; and Ms Soila Kaanto, Administrative Assistant-External Relations; Ms Tatiana Hadjiemmanuel, Senior Regional Specialist-Labour Migration and Development; Ms Romina Sta. Clara, Project Development and Liaison Officer for their support. From IOM Tajikistan, we are grateful to Mr Michael Hewitt, Project Manager and Ms Gulnora Kamolova, Project Assistant. From IOM Guyana, we are thankful to Mr Robert Natiello, Regional Coordination Officer for the Caribbean and Chief of Mission, IOM Guyana; Ms Eraina Yaw, Project Coordinator; Mr Brendan Tarnay, Program Support Officer; and Ms Briana Mawby, Lead Researcher in IOM's Regional Office for Central America, North America and the Caribbean.

We are indebted to all the kind souls that we met in Tajikistan, Kenya and Guyana for their kind cooperation. From Tajikistan, we are immensely grateful to Mr Emin Sanginzoda, the First Deputy Minister, Ministry of Labour, Migration, and Employment of Population; Mr Kamoliddinzoda, the Deputy Minister, Ministry of Economic Development and Trade; and Dr Sharipov Azizbek, Chairman of the Union of Employers. We thank Ms Marina Kadyrova, who worked as the interpreter in Tajikistan. We would remain grateful to our fellow Bangladeshi, Mr Matiar R. Khan—for his valuable time and hospitality during our stay in Tajikistan.

From Kenya, we are grateful to Mr Alexander Muteshilmbenzi, Director General, Directorate of Immigration, State Department of Interior and Citizen Services; Ms Edith Okoki, Acting Director General and William Ongeri Abuta, Acting Director of National Employment Authority; Mr Noah Chune, Director of Education and Economist of Central Organisation of Trade Unions; Mr Paolo Razzini, Junior Programme Officer, Office of the Representative to Kenya, Eritrea, Comoros, Seychelles and South Sudan, UNIDA Kenya. We are thankful to Square Pharmaceutical Limited of Bangladesh's young and enthusiastic team working in Kenya: Mr Rinton Chowdhury, Mr Mohammad Shahjahan and Mr Javed Hossain. We are grateful to the Honorable High Commissioner of Bangladesh in Nairobi, Kenya H.E. Maj Gen Md. Jahangir Kabir Talukder, for his very kind hospitality and invaluable insights.

From Guyana, for precious time and unstinted support we gratefully acknowledge Mr Michael E. Brotherson, Principal Foreign Service Officer, Director, Bilateral Affairs Department, Ministry of Foreign Affairs; Mr Jermaine Grant, Chief Technical Officer and Ms Carol Lewis-Primo, Chief Immigration Officer, Department of Citizenship, Ministry of Presidency; Ms Vanesso Profit, Head, Department of Demography, Vital and Social Statistics, Bureau of Statistics; Mr Nicholas Deygoo, President and Mr Richard Rambarran, Executive Director, Georgetown Chamber of Commerce and Industry; Sydney Armstrong, Head of Department, Department of Economics, University of Guyana; Mr Joel Bhagwandin, Economic Analyst/Manager, Private Sector Commission of Guyana Ltd; and Mr Owen Verwey, Chief Executive Officer, Guyana Office for Investment. We are thankful to the Bangladeshi Diaspora family of Mr Md Mizanur Rahman and Ms Selina to share an outsider's view from the inside and their hospitality at their home, serving delicious dishes prepared for us.

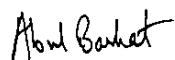
We are truly grateful to all the participants in the consultations held in Tajikistan and Guyana. The discussions in those events gave us valuable insights and helped us validate our preliminary research findings.

We thank the authority of Hotel Vatan, Dushanbe, Tajikistan; PridelInn Hotel Raphta, Nairobi, Kenya; and Duke Lodge, Georgetown, Guyana—where we stayed comfortably and could carry out our works smoothly. We also thank the authority of Hilton Hotel, Dushanbe, Tajikistan, and Marriott Hotel, Georgetown, Guyana—where we organised the consultations successfully in a congenial environment. We should not forget the drivers who took us to all the places timely, worked over the hours without any complaints.

The journey to these three countries—located in three parts of the world—was hectic. However, at every airport, we had the opportunity to meet Bangladeshi migrant workers and Diasporas. It was our pleasure to meet and talk with fellow Bangladeshis in foreign lands, a thousand miles away from our beloved motherland. The warm greetings from them and smile on the faces did not give us any scope to be tired during our long journeys. We salute them all for their valuable contribution—in many forms—to the development of Bangladesh.

Finally, we would like to thank all the untiring souls of HDRC involved in the process.

Thank you all again!



Prof Abul Barkat, *PhD*
Study Team Leader; and
Chief Advisor (Hon), Human Development Research Centre (HDRC)

February 2021

Abbreviations

ADB	Asian Development Bank
ADBG	African Development Bank Group
AfCFAA	African Continental Free Trade Area Agreement
ARIMA	Auto-Regressive Integrated Moving Average
ASMAK	Association of Skilled Migrant Agencies of Kenya
AT	Artuch Travel
AU	African Union
AWC	African Workers' Congress
BA	Bilateral Agreement
BAIRA	Bangladesh Association of International Recruiting Agencies
BB	Bangladesh Bank
BBC	British Broadcasting Corporation
BBS	Bangladesh Bureau of Statistics
BCLK	Bangladeshi Community Living in Kenya
BIT	Board of Industrial Training
BLS	Bureau of Labor Statistics
BMET	Bureau of Manpower, Employment and Training
BOESL	Bangladesh Overseas Employment and Services Limited
BTEB	Bangladesh Technical Education Board
CABAR	Central Asian Bureau for Analytical Reporting
CANTA	Caribbean Association of National Training Agencies
CARICOM	Caribbean Community and Common Market
CBET	Competency-Based Education and Training
CBT&A	Competency-based Training and Assessment
CDACC	Curriculum Development and Assessment and Certification Council
CGWR	Centre for Global Worker's Rights
CHPA	Central Housing and Planning Authority
CIA	Central Intelligence Agency
CoD	Countries of Destination
CoT	Climate to Travel
COTU	Central Organization of Trade Unions
COVID	Coronavirus Disease
CSME	CARICOM Single Market and Economy
CVQF	Caribbean Vocational Qualifications Framework
DC	Diaspora Community
DCI	Data Collection Instrument
DIS	Department of Immigration Services
DPs	Development Partners
EB	Encyclopaedia Britannica
EPZ	Export Processing Zone
EPZA	Export Processing Zone Authority Kenya
ERKJ	Embassy of the Republic of Kenya in Japan
EU	European Union
FBCCI	Federation of Bangladesh Chambers of Commerce and Industries
FBOs	Faith-Based Organisations
FDI	Foreign Direct Investment
FEZs	Free Economic Zones
FKE	Federation of Kenya Employers
FY	Financial Year
G2G	Government-to-Government
GCCI	Georgetown Chamber of Commerce and Industry
GCM	Global Compact for Safe, Orderly and Regular Migration
GDP	Gross Domestic Product
GEMS	General Executive Management Services Inc.

GMT	Greenwich Mean Time
GNI	Gross National Income
GoB	Government of Bangladesh
GoG	Government of Guyana
GoK	Government of Kenya
GoT	Government of Tajikistan
GPD	Google Public Data
GRA	Guyana Revenue Authority
GTI	Government Technical Institute
GTT	Government Trade Test
GYP	Guyanese Dollar
HDI	Human Development Index
HDRC	Human Development Research Centre
HIV	Human Immunodeficiency Virus
IDB	InterAmerican Development Bank
IDI	In-depth Interview
ILO	International Labour Organization
IMF	International Monetary Fund
IOM	International Organization for Migration
IPA	Investment Promotion Agency
ISCED	International Standard Classification of Education
ISCs	Industry Skills Councils
ISIC	International Standard Industrial Classification of All Economic Activities
ITUC	International Trade Union Confederation
KAM	Kenya Association of Manufacturers
KEPSA	Kenya Private Sector Alliance
KES	Kenya Shilling
KFL	Kenya Federation of Labor
KHCO	Kenya High Commission in Ottawa
KIA	Kenya Investment Authority
KII	Key Informant Interview
KNBS	Kenya National Bureau of Statistics
KNCCI	Kenyan National Chamber of Commerce and Industry
KNQA	Kenya National Qualifications Authority
KNQF	Kenya National Qualification Framework
KNUT	Kenya National Union of Teachers
KSA	Kingdom of Saudi Arabia
KUSU	Kenya Universities Staff Union
LAPSSET	Lamu Port-South Sudan-Ethiopia Transport
LCDS	Low Carbon Development Strategy
LLC	Limited Liability Company
LoC	Library of Congress
M&E	Monitoring and Evaluation
MLSP	Ministry of Labour and Social Protection
MoC	Ministry of Commerce
MoE	Ministry of Education
MoEDT	Ministry of Economic Development and Trade
MoEWOE	Ministry of Expatriates' Welfare and Overseas Employment
MoFA	Ministry of Foreign Affairs
MoLMEP	Ministry of Labour, Migration, and Employment of Population
MoU	Memorandum of Understanding
MSEA	Micro and Small Enterprises Authority
MSG	Management Study Guide
NAC	National Accreditation Council
NCLR	National Council for Law Reporting
NCM	National Coordination Mechanism for Migration
NGO	Non-Government Organisation

NIS	National Insurance Scheme
NITA	National Industrial Training Authority
NQF	National Qualifications Framework
NSC	National Skills Certificate
NSCM	National Steering Committee on Migration
NVC	National Vocational Certificate
NVTC	National Craft Certificate/National Vocational Certificate
PAHO	Pan American Health Organization
PD	People Daily
PI	People International
PLAR	Prior Learning Assessment and Recognition
PNCR	People's National Congress – Reform
PPP	People's Progressive Party
PPP	Public-Private Partnership
RECs	Regional Economic Communities
RO	Research Organisation
RPL	Recognition of Prior Learning
RTO	Registered Training Organisation
SA	Siyabona Africa
SDBE	State Department of Basic Education
SDG	Sustainable Development Goal
SEZ	Special Economic Zones
SME	Small and Medium-sized Enterprises
SMEs	Small and Medium Enterprises
TDF	Tourism Development Fund
TI	Transparency International
TIN	Taxpayer Identification Number
TTLAC	TRALAC Trade Law Centre
TUC	Trade Union Congress of Kenya
TVET	Technical and Vocational Education and Training
TVETA	Technical and Vocational Education and Training Authority
UAE	United Arab Emirates
UASU	Universities Academic Staff Union
UGC	University Grants Commission
UKCS	Union of Kenya Civil Servants
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDESA	United Nations Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNEVOC	International Centre for Technical and Vocational Education
USD	United States Dollar
VAT	Value Added Tax
WB	World Bank
WH	The White House
WHO	World Health Organization

Contents

Acknowledgements	
Abbreviations	
Executive Summary	i-iv
CHAPTER 1: INTRODUCTION	1
1.1 Background	1
1.1.1 Research Aim	2
1.1.2 Research Objectives	2
1.1.3 Countries Selected	2
1.2 Methodology	3
1.2.1 Study Topics	4
1.2.2 Primary Data Collection Schema	5
1.2.3 Stakeholder Consulted during the Primary Data Collection	6
1.2.4 Projection Techniques Used	8
1.2.5 Study Limitations	10
CHAPTER 2: INTERNATIONAL MIGRATION POTENTIALS TO GUYANA	11
2.1 Basic Information about Guyana	11
2.2 Economy of Guyana	17
2.2.1 Economic Status of Guyana	17
2.2.2 Economic Prospects of Guyana	21
2.3 Technical and Vocational Education and Training System in Guyana	24
2.4 Employment and Labour Market in Guyana	27
2.4.1 Employment and Labour Market Status in Guyana	27
2.4.1.1 Employment by Sector	27
2.4.1.2 Skills Status	28
2.4.1.3 Labour Rights Scenario	29
2.4.2 Projected Scenario of Employment and Labour Market in Guyana	29
2.4.3 Potentials for Migrant Workers in the Labour Market of Guyana	32
2.4.3.1 Need for Migrant Workers	32
2.4.3.2 Scopes for Migrant Workers	38
2.5 Potentials for Bangladesh in Guyana	39
2.5.1 Labour Market Potentials	39
2.5.2 Investment Potentials	48
2.6 Conclusion and Recommendations	52
2.6.1 Conclusion	52
2.6.2 Recommendations	53

CHAPTER 3: INTERNATIONAL MIGRATION POTENTIALS TO KENYA.....	55
3.1	Basic Information about Kenya 55
3.2	Economy of Kenya..... 61
3.2.1	Economic Status of Kenya 61
3.2.2	Economic Prospects of Kenya..... 64
3.3	Technical and Vocational Education and Training System in Kenya 67
3.4	Employment and Labour Market in Kenya 70
3.4.1	Employment and Labour Market Status in Kenya 70
3.4.1.1	Employment by Sector 70
3.4.1.2	Skills Status 71
3.4.1.3	Labour Rights Scenario 73
3.4.2	Projected Scenario of Employment and Labour Market in Kenya 74
3.4.3	Potentials for Migrant Workers in the Labour Market of Kenya 77
3.4.3.1	Need for Migrant Workers 77
3.4.3.2	Scopes for Migrant Workers 83
3.5	Potentials for Bangladesh in Kenya 86
3.5.1	Labour Market Potentials..... 86
3.5.2	Investment Potentials 93
3.6	Conclusion and Recommendations 96
3.6.1	Conclusion..... 96
3.6.2	Recommendations 97
CHAPTER 4: INTERNATIONAL MIGRATION POTENTIALS TO TAJIKISTAN.....	99
4.1	Basic Information about Tajikistan..... 99
4.2	Economy of Tajikistan 107
4.2.1	Economic Status of Tajikistan..... 107
4.2.2	Economic Prospects of Tajikistan 111
4.3	Technical and Vocational Education and Training System in Tajikistan..... 112
4.4	Employment and Labour Market in Tajikistan 114
4.4.1	Employment and Labour Market Status in Tajikistan..... 114
4.4.1.1	Employment by Sector 114
4.4.1.2	Skills Status 115
4.4.1.3	Labour Rights Scenario 116
4.4.2	Projected Scenario of Employment and Labour Market in Tajikistan..... 117
4.4.3	Potentials for Migrant Workers in the Labour Market of Tajikistan 118
4.4.3.1	Need for Migrant Workers 118
4.4.3.2	Scopes for Migrant Workers 123
4.5	Potentials for Bangladesh in Tajikistan 125
4.5.1	Labour Market Potentials..... 125
4.5.2	Investment Potentials 131

4.6	Conclusion and Recommendations	134
4.6.1	Conclusion	134
4.6.2	Recommendations	136

CHAPTER 5: CONCLUSION..... 137

REFERENCES 140

List of Diagrams

Diagram 1.1:	Broad steps of the study	3
Diagram 2.1:	Dynamics of GDP Size of Guyana	18
Diagram 2.2:	GDP Composition of Guyana (in %)	18
Diagram 2.3:	Possible impacts of the development of oil and gas across the sectors in Guyana	23
Diagram 2.4:	The employment projections for Guyana using different techniques.....	31
Diagram 2.5:	Comparison of Population pyramids, Guyana: 1960-2012.....	34
Diagram 2.6:	Historical trend of labour force participation rates, Guyana: 1960-2018 (in %).....	35
Diagram 2.7:	Potential Investors' roadmap for investing in Guyana	50
Diagram 3.1:	Dynamics of GDP Size of Kenya	61
Diagram 3.2:	GDP composition of Kenya (%).....	62
Diagram 3.3:	The employment projections using different techniques	77
Diagram 3.4:	Comparison of Population pyramids, Kenya: 1989-2019	79
Diagram 3.5:	Historical trend of Kenya Labour Force Participation Rate, 2009-2019.....	80
Diagram 3.6:	Kenya Labour Force Participation Rate, 2019 (Quarter 1- Quarter 4)	80
Diagram 3.7:	Historical data of employment, 2015-2019.....	81
Diagram 4.1:	Dynamics of GDP Size of Tajikistan	108
Diagram 4.2:	GDP Composition of Tajikistan (in %)	108
Diagram 4.3:	The employment projections for Tajikistan using different techniques.....	118
Diagram 4.4:	Comparison of Population pyramids, Tajikistan: 1960–2012	120
Diagram 4.5:	Historical trend of labour force participation rates, Tajikistan: 1991-2018 (in %)...	121
Diagram 4.6:	Investment architecture in Tajikistan.....	133

List of Tables

Table 1.1:	Issues in the study.....	4
Table 1.2:	List of the stakeholders consulted during the primary data collection in the destination countries	7
Table 1.3:	Distribution of respondents/participants by the destination countries	8
Table 2.1:	Per capita GDP scenario of Guyana and Bangladesh, 2018	19
Table 2.2:	Average monthly earning of an employee by sector, 2018.....	20
Table 2.3:	National Qualifications Framework (NQF) of Guyana	24
Table 2.4:	Employment status of the Guyana labour force, 2018.....	28
Table 2.5:	Skills Status Estimations by ILO, 2014—2022 (in %).....	28
Table 2.6:	Employment scenario of Guyana in 2018 and projection for 2030	30
Table 2.7:	Number of additional workers required by sector for the year 2030	32
Table 2.8:	Population distribution of Guyana according to age groups for selected years (in numbers and percentages)	35

Table 2.9:	Projected employment growth and unmet demand of migrant workers in Guyana by 2030.....	37
Table 2.10:	Scopes for the potential migrants from Bangladesh to Guyana.....	40
Table 2.11:	Availability of appropriate training in Bangladesh to utilise labour market potentials in Guyana.....	44
Table 2.12:	Economic sectors encouraged by the Government of Guyana.....	48
Table 2.13:	The potential areas for investment in Guyana from Bangladesh.....	51
Table 2.14:	Recommendations to utilise the potentials in Guyana.....	54
Table 3.1:	Per capita GDP scenario of Kenya and Bangladesh, 2018.....	62
Table 3.2:	Average monthly earning of an employee by sector, 2019.....	63
Table 3.3:	Monthly salary level in Kenya in different positions and occupation.....	63
Table 3.4:	Potential economic areas in Kenya.....	66
Table 3.5:	Level of Qualification, Skill and Competence.....	68
Table 3.6:	Employment scenario in Kenya, 2015 – 2019.....	70
Table 3.7:	Wage employment status of the Kenya labour force, 2019.....	71
Table 3.8:	Skills status estimations by ILO, 2014—2022 (in %).....	72
Table 3.9:	Most demanded training courses.....	72
Table 3.10:	Areas where there is a lack of proper training in Kenya.....	73
Table 3.11:	Employment scenario of Kenya in 2019 and projection for 2030.....	75
Table 3.12:	Population distribution of Kenya according to age groups for selected years (in numbers and percentages).....	79
Table 3.13:	Projected employment growth and unmet demand of migrant workers in the wage employment in Kenya by 2030.....	82
Table 3.14:	Scopes for the potential migrants from Bangladesh to Kenya.....	86
Table 3.15:	Availability of appropriate training in Bangladesh to utilise labour market potentials in Kenya.....	89
Table 3.16:	Recommendations to utilise the potentials in Kenya.....	98
Table 4.1:	Per capita GDP scenario of Tajikistan and Bangladesh, 2018.....	109
Table 4.2:	Average monthly earning of an employee by sector, 2018 (in Tajik Somoni).....	110
Table 4.3:	Employment status of the Tajikistan labour force, 2018.....	115
Table 4.4:	Skills Status Estimations by ILO, 2014–2022 (in %).....	115
Table 4.5:	Employment scenario of Tajikistan in 2018 and projection for 2030.....	117
Table 4.6:	Population distribution of Tajikistan according to age groups for selected years (in numbers and percentages).....	120
Table 4.7:	Projected employment growth and unmet demand of migrant workers in Tajikistan by 2030.....	122
Table 4.8:	Scopes for the potential migrants from Bangladesh to Tajikistan.....	126
Table 4.9:	Availability of appropriate training in Bangladesh to utilise labour market potentials in Tajikistan.....	129
Table 4.10:	Recommendations to utilise the potentials in Tajikistan.....	136

List of Boxes

Box 2.1:	Organisations representing the private sector of Guyana.....	21
Box 2.2:	Glimpses on the Government Technical Institute.....	25
Box 2.3:	General-education system in Guyana.....	26
Box 2.4:	Migration profile of Guyana.....	36
Box 2.5:	A case story of a Bangladeshi diaspora family in Guyana.....	43
Box 3.1:	The Massai.....	57
Box 3.2:	Major organisations representing the private sector of Kenya.....	64
Box 3.3:	The African Continental Free Trade Area Agreement.....	65

Box 3.4:	Kenya's long-term development planning	65
Box 3.5:	The National Industrial Training Authority, Kenya	69
Box 3.6:	Migration profile of Kenya	81
Box 3.7:	Types of permits.....	84
Box 3.8:	Prospective sectors for investment and joint ventures.....	95
Box 3.9:	Bangladeshi pharmaceutical industry invests in Kenya	95
Box 4.1:	National Development Strategy of the Republic of Tajikistan	111
Box 4.2:	The vacuum in the higher education system in Tajikistan.....	114
Box 4.3:	Migration profile of Tajikistan	122
Box 4.4:	A case story of a Bangladeshi professional working in Tajikistan for two decades	128

List of Matrixes

Matrix 2.1:	The state of Bangladesh regarding utilisation of the possibilities of Guyana	53
Matrix 3.1:	The state of Bangladesh regarding utilisation of the possibilities of Kenya	97
Matrix 4.1:	The state of Bangladesh regarding utilisation of the possibilities of Tajikistan	135
Matrix 5.1:	The state of Bangladesh regarding utilisation of the possibilities in the selected destinations – Guyana, Kenya, and Tajikistan	137

List of Maps

Map 1.1:	Countries selected for the labour market research	2
Map 2.1:	Guyana	11
Map 3.1:	Kenya	56
Map 4.1:	Tajikistan	99

ANNEXES

Annexe 1:	The Data Collection Instruments	160-187
Annexe 2:	HDRC Study Team	188-189
Annexe 3:	GoB Officials and Other Stakeholder Involved	190-191

Executive Summary

Background

Bangladesh is one of the major labour sending countries with around 12 million Bangladeshis over the world. Considering the changing nature of the global economies, the Government of Bangladesh (GoB) feels the need for rigorous labour market research for exploring new destinations having the opportunities for safe and decent labour markets. In this regard, under a European Union (EU)-funded project, titled "*Bangladesh: Sustainable Reintegration and Improved Migration Governance (Prottasha)*", the International Organization for Migration (IOM) is supporting the GoB. IOM Bangladesh commissioned Human Development Research Centre (HDRC) – one of the leading research organisations of Bangladesh – to support the GoB to conduct the accompanying research in three select countries: "The Co-operative Republic of Guyana", "The Republic of Kenya", and "The Republic of Tajikistan".

The research findings intend to support the Government – particularly the Ministry of Expatriates' Welfare and Overseas Employment (MoEWOE) – to make informed policy decisions and design effective overseas employment programmes. Furthermore, the likelihood is high that the whole research process would help establish and strengthen partnerships between Bangladesh's relevant stakeholders and those in destination countries. The accompanying research also envisages identifying the prospective areas for Government-to-Government (G2G) engagements.

Research Objectives

- To assess the labour market needs across the sectors of the destination countries and identify required skills;
- To assess the labour market demand including projections, trade qualifications, existing migration scenario of the destination countries and assessing supply-side capabilities of Bangladesh; and
- To propose key recommendations to fill in Bangladesh's identified gaps to enter the destination countries' labour market, respectfully.

Methodology

The study used quantitative and qualitative methods to produce informed analytical-outputs at a macro level on international labour market demand analysis. The study, primarily, relied on secondary data and information. However, in the later phase, the study used primary information – mostly qualitative, collected from the Key Informants in the destinations – Guyana, Kenya, and Tajikistan. The study used several projection techniques to forecast the future demand for labour by sectors. The study followed the basic principle of a mutually respectful collaboration of MoEWOE, IOM, and HDRC.

The concerned delegations comprising the researchers, GoB-nominated officials, and the Bangladesh Association of International Recruiting Agencies (BAIRA) visited the selected countries. They collected the primary data and information from various relevant stakeholders. The stakeholders include appropriate Government agencies, business leaders, technical and vocational training centres, trade unions, academicians, development partners, Bangladeshi workers, and the Diaspora community. The study team met and discussed a total of one hundred respondents from fifty-six different entities in the three countries. A total of seven semi-structured data collection instruments were used in the process of data collection. The in-country data collection was

done during the time between October 2019 and February 2020. The research team also organised "Consultation Workshops" in *Tajikistan* and *Guyana* with the key stakeholders' proactive participation.

As the data collection took place before the mass outbreak of COVID-19, the analysis portrays the without-pandemic scenario. However, given the unprecedented global catastrophic situation attributable to the COVID-19 and the emerging economic crisis, it would be necessary to re-study the external labour market situation.

Guyana foresees a formidable jump and take-off in its economy attributable to the recent oil and gas exploration. As a result, it is most likely that all relevant backward and forward linkages industries, including the infrastructure and service industries, would get an impetus. Therefore, sectors and subsectors like transportation, roads and highways, communication, and financial services may experience high growth. All these would pose a high demand for workers at all levels in the next ten years. However, the country is not in a position to supply the required labour-power from within. Policymakers of Guyana informs that they would require skilled foreign workers across sectors. Our projection shows that by 2030 Guyana's demand for skilled migrant workers may range between 48,506 and 55,436. The potential workforce of Bangladesh with relevant skills is suitable to meet Guyana's unmet demand. Besides, Bangladeshis can communicate in English, which is the official language of Guyana.

Among other sectors, the suitable critical areas for the potential Bangladeshi skilled migrants in Guyana are: "Agriculture, forestry and fishing", "Manufacturing", and "Construction". Also, there are good scopes for Bangladeshis to work independently and earn a fair amount of money as "Cell phone mechanic", "Electrician (including repair of electric appliances)", "Refrigerator and Air conditioner mechanic", and "Automobile mechanic".

In the next ten years or so, it is most likely that the investment demand would rise at a fast rate. The positive side includes liberalised status with no policy restriction on a specific proportion of migrants to local workers in any country's sector or industry. The potential areas for investment from Bangladesh could be "Agriculture and agro-food processing"; "Manufacturing", "Construction", "Transport, storage and communication", "Tourism and hospitality management", "Energy" and "Financial activities".

Kenya poses a relatively low scope for the less-skilled foreign workers. Besides, the process and costly work-permits make it more unfavourable for the less-skilled workers to plan for migrating to Kenya. However, there is a skills gap. Employers look forward to engaging professionals and skilled foreign workers in particular sectors and occupations. Our projection shows that by 2030, Kenya would require skilled migrant workers in a range between 56,841 and 102,736. Bangladeshi labour force fitted-to-Kenyan economy has the potentials to work as a migrant worker. An additional advantage is that English is the official language of Kenya.

Among other sectors, some suitable areas for the potential Bangladeshi skilled workers in Kenya are: "Manufacturing (Textile and garments; Pharmaceuticals; Building and construction material)" and "Construction (Engineers, Electrician, Plumbing, Sanitary work, and Drainage system)". Also, there is a high demand for skilled professional such as "Computer systems analysts", "Networking

Key Research Findings: GUYANA

Key Research Findings: KENYA

specialist", "Financial analysts", and "Financial activity-related IT manager" in various sectors. Besides, there exists a high demand for "High skilled auto mechanics", "Skilled and semi-skills workers for maintenance and repair of various electrical and mechanical equipment.

Kenya is a country having high potentials for investments from Bangladesh in many sectors. These include "Textile and readymade garment", "Pharmaceuticals", "Cotton farming", "Wood processing and furniture making", "Leather processing and product manufacturing", "Value-adding agricultural products", "Jute products and packaging", "Financial Institutions", "Energy" and "ICT (in particular, cell phone-based technologies)".

The concerned authorities emphasised on "*Look Africa*" policy and related to that economic diplomacy. The Bangladesh High Commission's capacity in Nairobi needs improvement in human resources and priority to reap the potentials.

Tajikistan, as it stands now, possesses not much-pronounced scope for the less-skilled foreign workers. However, Tajikistan lacks the availability of skilled workers. The employers and the policymakers have expressed a need for skilled workers and professionals in selected sectors and occupations. Our projection depicts that by 2030, Tajikistan would require many skilled migrant workers ranging between 52,280 and 94,100. It will be an added advantage for a potential migrant if s/he has the essential communication skills using Tajik or Russian language.

Among other sectors, the key potential areas of gainful employment of Bangladeshi workers to Tajikistan could be "Agriculture (particularly, mechanised-agriculture)", "Industry (particularly, supervisor and quality controller level at the textile and readymade garment industries)", and "Construction (Engineers; Skilled Electrician, Plumber, Welder, Mason)". There is also demand for "High skilled auto mechanics", "Skilled and semi-skills workers for maintenance and repair of various electrical and mechanical equipment. The country looks for trained teachers for "English language" and "Science". Health professionals have some scope too.

There are ample scopes for joint ventures between Tajikistan and Bangladesh. Bangladesh can initiate joint ventures in textile and readymade garment sector. Other potential areas of investments are: "Hydropower industry", "Agriculture and processing of agricultural products", "Mining and chemical industry", "Light industry", "Transport", "Financial sector" and "Tourism". The "Free Economic Zones" of the country has the right incentives for the investors.

Recently, in June 2019, Mr Md. Abdul Hamid, Honorable President of Bangladesh, as State guest, visited Tajikistan. His meeting with Mr Emamoli Rahmanov, Honorable President of Tajikistan, opens some avenues to explore further.

Key Research Findings: TAJIKISTAN

Conclusion and Way Forward

In all three countries – Guyana, Kenya, and Tajikistan – the room for less-skilled workers, is meagre or almost non-existent. However, there are skills-gaps across the nations, and skilled Bangladeshis can fill in the unmet demand for skilled workers in particular sectors and occupations. Bangladesh has a good number of skilled workforce, who can join in these countries' required trades. It is good to know that there is no discrimination regarding wage between the local workers and the migrant workers in these countries. Nonetheless, appropriate

accreditation of the Bangladeshi certificates in the destinations remains an issue to be resolved.

There are good opportunities for investment and ample scopes for initiating joint ventures with the destination countries. The modes could be G2G or Public-Private Partnership (PPP). Business Forum and Chambers can also undertake the "Business-to-Business (B2B)" endeavours. However, to start the process efficiently with full transparency, it is highly suggested to initiate G2G interactions and interventions engaging the government's relevant top-level officials. Facilitating joint ventures and businesses in the destinations would not only open new economic window for Bangladesh, but it also would open the avenue of sending a skilled workforce from the country to work in those business entities.

Nonetheless, utilising the opportunities would undoubtedly be difficult without strengthening diplomatic relations between the countries. Above all, it requires to initiate a timely and effective plan or Strategy, if Bangladesh wants to reap the opportunities.

Considering the unprecedented uncertainties and global economic depression coupled with possible-unpredictable political changes attributable to the COVID-19 Pandemic, it is obvious that some "new-need-based studies" shall have to be launched to accommodate the exogenous changing scenario of each country and region. However, the labour market research-based analysis and informed recommendations forwarded in this study would remain in-principle-valid to a large extent because countries have to progress fast based on some equilibrium of demand and supply of labour in the economy and society.