



# Global Demand Assessment for Nepalese Skilled Workforce

*Report Based on Advertisement Analysis*

## **Global Demand Assessment for Nepalese Skilled Workforce**

(A report based on advertisement analysis)

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Labour migration occurs everywhere from developing to developed countries. In the present age of globalization, movement of people can't be restricted and also not desirable to do so. But various measures can be taken to get maximum benefit from it. Skilling individuals can augment his potentialities thereby helps in finding decent jobs. At the same time, increased share of skilled workforce in labour force can contribute for greater remittance to the country.

It is immense pleasure for CTEVT, Research and Information Division that it has completed the fourth successive edition of this advertisement analysis report. This edition has attempted to incorporate more information regarding the employment opportunities for Nepalese technical human resources in global labour market as well as adopt more statistical and scientific analytical techniques than used in earlier editions.

This research report is the outcome of synergic efforts of many individuals inside and outside the CTEVT system. It is beyond the imagination if those individuals didn't provide their valuable time and painstaking efforts to bring the report in this shape. I therefore take this opportunity to offer sincere thanks to all of those individuals and organizations who has direct or indirect contribution in this report. We gratefully acknowledge and owe our large debt to each of the following persons.

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Manoj Sharma Neupane  
Deputy-Director, R & I Division

## Acronyms and Abbreviation

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AC	Air Conditioning
ANOVA	Analysis of Variance
CBS	Central Bureau of Statistics
CCTV	Close Circuit Tele Vision
CDP	Chef De Partie
CTEVT	Council for Technical Education and Vocational Training
EPS	Employment Permission System
FGD	Focus Group Discussion
GCC	Gulf Cooperation Countries
GDP	Gross Domestic Product
HR	Human Resources
HVAC	Heavy Vehicle Air Conditioning
ICT	Information and Communication Technology
JCB	(Name of equipment named on its inventor Joseph Cyril Bamford)
MoF	Ministry of Finance
MoLTM	Ministry of Labour and Transport Management
NLSS	National Living Standard Survey
QAQC	Quality Assurance and Quality Control
SLC	School Leaving Certificate
SPSS	Statistical Program Social Science
SWATEE	South Asia Watch for Trade Economics and Environment
TITI	Training Institutes for Technical Instruction
TVET	Technical Education and Vocational Training
UAE	United Arab Emirates
WEF	World Economic Forum

### Executive Summary

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Since the time of liberalization of economy in 1985, the trend of out migration of Nepalese youth has been increasing year by year. In the last year (2013/14), both the volume of out migration of Nepalese Youths as well as the inflow of remittance reaches to its all-time highest points. According to the Economic Survey, the remittance inflow to the country in the first eight months of the fiscal year 2070/71 is NRs. 560.6 Billion which is counted as 29.1% of GDP. At the same time the number of out-migration from Nepal in the Fiscal Year 2070/71 reach to its all-time highest number 521,878. Although, foreign employment is playing pivotal role in the economy and remittance income stands as a backbone, the condition of Nepalese migrant workers is extremely vulnerable and per worker income is also significantly low. The undesirable situation faced by migrant workers can partly be attributed to their low level of skills or efficiency. This study therefore aimed to analyze the role of skills training among the migrant workers despite the limited information available to the research team. The major source of information for this analysis is the published advertisements regarding the foreign employment in Kantipur National Daily.

The objectives of the study were to identify the most demanded skills in foreign employment and speculate the tentative numbers of demand of such skilled workers; spell out the gap between demand and supply of Nepalese workforce in global labour market in terms of both the types of skills and number of workforces; and suggest the measures for improvement in the existing training programs to bridge this gap.

Almost six thousands advertisement cases were entered and analyzed by means of statistical program named SPSS. These advertisement cases were collected from Kantipur National Daily published between Shrawan to Paush, 2071. Besides the demand side information from the published advertisements, some representative foreign employment agencies were also visited and gathered supply side data and information with the help of semi-structured questionnaire. The supply side information includes the number of migrants, their occupation, destination country, sector of employment among others. Instead, interviewees were also requested for their perception on some vital aspects of skill mismatch and composition of workforce. The obtained information then entered in to SPSS program and analyzed it accordingly. In addition, desk analysis of adequate number of literatures, FGD and Key-informants' Interview was also carried out to substantiate as well as triangulate the findings of the primary survey.

Altogether 166,460 positions were demanded from 5862 advertisement cases. Among these demanded posts, about 95% demand were obtained from four major countries like Qatar, UAE, Malaysia, Saudi-Arabia and Kuwait, where the demand obtained from Qatar is 34.2%, followed by UAE (28.3%), Malaysia (15.9%) and so on. While categorizing the demand in terms of level of skills, unskilled category occupies greatest volume with 39.2% share in total demand followed by Skilled 34.5%, Semi-skilled (24.4%) and Professional (1.7%).

There is significant variation in the expected salary among the migrant workers. Individuals were found offered monthly salary from NRs. 18,200 to NRs. 42,704. Level of skill is justified as the main source of this variation. A semi-skilled worker can expect monthly salary higher by 40% than the expectation of unskilled worker, whereas the corresponding expectation of skilled and professional workers are higher by 58% and 182% respectively. Although level of skill is the major source for income variation among the migrant workers, this is not a single source that can be

responsible for such variation. Type of skill, economic and social status of destination countries, and educational qualification of migrant workers are the other factors that are also responsible for variation in income. There is not any significant relationship between expected salaries and costs of migration, however the variation of expected cost of migration is statistically significant among various group of skill categories.

Rapid change in skill composition can be observed among Nepalese migrant workers in recent years. The proportion of unskilled workers has decreased by 17 percentage point during 2004 to 2014, whereas the corresponding figures of skilled and Semi-skilled workers has increased by 13 and 5 percentage point with in the same period of time. Nepalese foreign employment professionals have received increasing demand of skilled workers in recent years. This is also creating pressure to increase the supply of workers accordingly however; the capacity of training institutes in Nepal is not in the position to satisfy the received demand.

There seems mismatch between demand and supply of skilled workforce in foreign employment sectors. Scarcity of skilled workforce is still the problem in some trades however some trades are found already saturated in terms of quantity of graduates if not in quality. Type and number of training therefore always be the matter of revision in every couple of years.

Safer migration is the function of education and training which includes both hard skills and soft skills. Both of these skills should be included in the training program and provided in a package. The orientation training provided by Foreign Employment Promotion Board should be linked up with the skills training provided by various training institutes.

Despite the major role of skills in safer migration, neither the Foreign Employment Act 2064 has incorporated strict provisions regarding necessity of skill certificate for skilled jobs, nor majority of foreign employment professionals are found honest to follow the sentiments of the act regarding this issue. Reform in Foreign Employment Act 2064 and other rules and regulations is therefore essential to guarantee the "Skill Certificate for Skill Job" and should be implemented accordingly.

Last but not least, skills trainings always augments the potentials and enhances productivity thus widens the economic horizons of not only individuals but nation in totality. But majority of graduates of presently available training programs neither get the employment opportunities in the country nor satisfy the needs of abroad demand. Reason is simple, quality facet of training and needs of labour market are not getting due emphasis in every phase of training from designing to implementation of these training programs.

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## 1. INTRODUCTORY

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### 1.1 Background

Presently, remittance is becoming as the backbone of Nepalese economy. According to the Economic Survey, the remittance inflow to the country in the first eight months of the fiscal year 2070/71 is NRs. 560.6 Billion which is counted as 29.1% of GDP. On one hand, out-migration of human resources in itself is not an encouraging sign for any economy, the further disappointing fact is that only lower proportion of migrants from Nepal are involved in skilled-job on the other. Presently, large number of institutions are imparting TVET Program throughout the country however, It is still believed that alarming number of migrant workers from Nepal are unskilled (69.1 percent) while corresponding figures of semiskilled, skilled, and highly skilled are only 27.1%, 3.4% and 0.4% respectively (Gurung, 2007). On the one hand, it has been reported that foreign employment professionals are facing scarcity of skilled workers to fulfill the demand of abroad. On the other hand, negligible numbers of migrant workers from Nepal are only found in skilled jobs.

Presently, substantial numbers of training institutions under both governmental and private sectors are providing vocational training programs related to different trades and sectors. In contrast, the graduates of these training are not getting satisfactory job as per the skills and their competency. Serious mismatch was found between the skill imparted during training and the actual need of job market. This type of skill-work mismatch is found further wider in foreign market than domestic own. Identifying such mismatch is the basic requirement to prepare demand based skilled human resources.

### 1.2 Significance of the study

As per the Foreign Employment Act 2064, manpower companies have to publish a notice with adequate information about the nature of the job and cost of migration before sending such workers to employment. These advertisements give great deal of information about foreign employments including the qualification of workers, working conditions, proposed incentive to workers and tentative cost of migration. On one hand, this information is vital to analyze the demand side aspect of foreign employment. On the other hand, the cost and duration of study can also significantly reduce by adopting this approach. Moreover, a longitudinal study is also possible.

Although, this study is being carried out as a part of the annual program of CTEVT, Research and Information Division, this gives vital information to both TVET institutions as well as Manpower Agencies for their better performance in future thereby contributes to increase income of individual workers and volume of remittance to the country.

### 1.3 The objectives of the study

The purpose of the study is to conduct advertisement assessment to get the required information regarding the employment opportunities from global market and to spell out the general mismatch with the domestic supply capacity. The specific objectives of the study are to:

- identify the presently available demand of Nepalese skilled human resources for foreign employment in term of both quality and quantity;
- spell out the general mismatch between HR demand received from abroad and domestic capacity for supply.
- identify the broader areas to improve the skills of existing human resources so as to better address the foreign employers' needs;

### 1.4 General approach and methodology

This study was based on Mixed Method. Both demand side and supply side information was collected, analyzed and compared to assess the exact mismatch between the demand and supply of HR and the skills they have. Demand side information was mainly collected from advertisement published for foreign employment in Kantipur National Daily. All the advertisements published in this newspaper between Shraban 1, 2071 to end of Paush 2071 was collected and entered in to the statistical program named SPSS. After the data entry, it was processed, cleaned and analyzed accordingly. The published advertisements give the demand side details including the cost for migration, incentive provided by employer companies, skills and education requirements for migrants among others.

Instead of advertisement analysis, some supply side information is also vital to know the market situation. For the supply side information, door to door visit of some representative foreign employment agencies was carried out. Forty such agencies were visited and gathered the supply side data and information with the help of semi-structured questionnaire. The supply side information includes the number of migrants, their occupation, destination country, sector of employment among others. Instead, interviewees were also requested for their perception on some vital aspects of skill mismatch and composition of workforce. The obtained information then entered in to SPSS program and analyzed it accordingly.

In addition, desk analysis of adequate number of literatures, FGD and Key-informants' Interview was also carried out to substantiate as well as triangulate the findings of the primary survey. The data that explores the relationship of skill to the income and decent jobs mainly focused in this study.

A broader interaction programme was also organized which was participated by the representatives of various agencies related with TVET and Foreign Employment. Prepared draft report was shared and discussed among them. Some important comments and suggestions were also obtained to refine and finalize the draft report.

### 1.5 Activities carried out during the study

As per the methodology briefed as above, the following activities were carried out for this study.

- Review sufficient relevant and reliable national and international literatures;
- Prepare inception report with the valid and reliable study design and methodology;
- Develop tools and instruments to collect both qualitative and quantitative data and information;
- Collect primary data of supply side information from HR supplier agencies from the determined sample size as well as gather relevant information from secondary sources;
- Conduct personal interview and focus group discussions with key informants and other stakeholder for qualitative information;
- Conduct interaction program with stakeholders in two stages;
- Develop data entry formats in any statistical package named SPSS.
- Process, enter, clean and analyze the data;
- Prepare draft report and present it in interaction programmes;
- Refine the draft report as per the obtained feedbacks

### 1.6 Limitations of the Study

As in other social science study, this study had also some limitations which are listed out as hereunder.

- Since, the study is about assessment of foreign labour demand; it would have therefore sufficiently benefited if at least a short term observation visit could have been managed in any of the major destination countries, which couldn't be done due to the resource constraints.
- Because of the limited budget for the field visit, small sample size was the compulsion which is also the major limitation of the study.
- Unavailability of disaggregated data as per the skill categories was another limitation.
- Various data are compared in this study about the composition of skill jobs among the migrant workers; however the basis of these jobs may not be same. The comparability of data therefore was not unquestionable.

## 2 OVERVIEW OF FOREIGN EMPLOYMENT

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### 2.1 Background

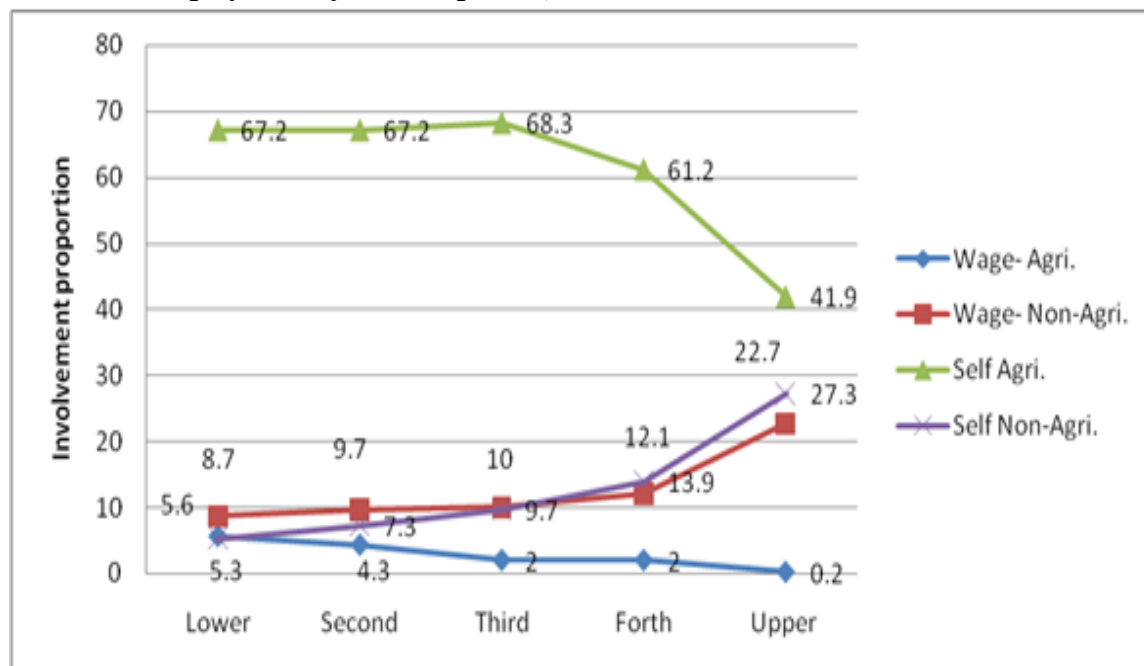
Nepal is still an agrarian economy. More than 74% of population are engaged in agriculture sector which contributes one third of GDP. Agricultural practice in Nepal is completely traditional and uses the labour intensive technologies thereby the productivity of this sector is extremely low. The structure of Nepalese economy has been changing gradually. Contribution of agriculture and industrial sectors to GDP showed a declining trend while that of services sector showed the opposite. In the FY, 2002/03, the contribution of primary, secondary and tertiary sector to nominal GDP was 38.59%, 17.80% and 46.52% respectively whereas the corresponding composition of FY 2013/14 are at 33.7 percent, 14.1 percent and 52.3 percent respectively (MoF, 2014). According to Nepal Living Standard Survey, only 46% of economically active population are fully employed (NLSS, 2010/11). On one hand, large majority of workforce are engaged in agricultural sector, which is comparatively less productive. On the other hand, the manufacturing sector which is comparatively productive sector, have been narrowing down during the last decade. In this scenario, priority should be given on raising productivity which can be translated to higher economic growth.

### 2.2 Composition and distribution of labour force

The report of Nepal Labour Force Survey 2008 had revealed that the labour force participation rate is decreased by 1.4 percentage point from 1998/99 to 2008. Considering the gender wise data, the economically active male population (87.5%) was significantly higher than economically active female population (80.1%). At the same time, economically active boys' population was slightly lower than that of the girls' which further suggests that the access to education to girls was lower than that to boys. On one hand labour force participation rate has been declined during the analyzed period. On the other hand, the employment rate during the same period had decreased by 2.6 percentage point, despite the rise of paid worker by 0.9 percentage point (CBS, 2008). The increase of paid worker reveals the fact that displacement of workforces from subsistence agricultural sector to other sectors has occurred; however the rate is far lower than it was desired. Out of the total economically active population of 11.8 million, only 2 million was wage employed rest 9.8 million were self-employed (CBS, 2008).

The line graph in chart 2.1 depicts the trend of employment as per the consumption quintiles. While analyzing the trends, we find that the proportion of employment in agriculture decreases moving from lower to upper quintile in both wage and self-employment. But the rate is higher in self-employment than in wage employment. Unlike the agriculture sector, the employment proportion in non-agriculture sectors increases while moving from lower consumption quintile to upper consumption quintile. This discrepancy on data suggests that productivity of workforce is lower in agriculture occupation since the impact of productivity can be observed in income and consumption.

**Chart 2.1: Employment by Consumption Quintile**



Source: Nepal Living Standard Survey 2010/11

### 2.3 Labour migration situation from Nepal

It is reported that 450,000 labour force are entering annually in the labour market, however the job creation capacity of an economy is very lower than that number (MoF, 2011). These entrants therefore have no choice than leaving to foreign employment for their ends meet regardless of the salary and nature of work. It is also widely reported that most of migrant workers are involved in menial and lower paid jobs. Moreover, the conditions of female workers are even critical who migrates for house maid jobs (MoLTM, 2010).

Table 2.1: Trends of Migrants and Inflow of Remittance

S.N.	Fiscal Year	Number of Migrants	Remittance ( NRs. Million)
1	2059/60	105,043	54.2
2	2060/61	106,610	58.6
3	2061/62	139,718	65.5
4	2062/63	165,252	97.7
5	2063/64	204,533	100.1
6	2064/65	249,051	142.7
7	2065/66	219,965	209.7
8	2066/67	294,094	231.7
9	2067/68	354,716	253.6

S.N.	Fiscal Year	Number of Migrants	Remittance ( NRs. Million)
10	2068/69	384,665	259.6
11	2069/70	450,834	434.6
12	2070/71	521,878	560.6

Sources: Department of Foreign Employment 2071

MoLTM, 2010. (Foreign Employment and Remittance and its Contribution to Economy of Nepal, MoF 2013, Economic Survey, 2012/013

After the liberalization of economy in 1985, the foreign employment opportunities for Nepalese started to emerge up. As a result, the unemployed youth began to migrate to countries with emerging economics like Malaysia and some gulf countries to seek employment. The figure depicted in Table 2.1 reflects that both the number of migrants and amount of remittance has been sky rocketing in present years. Moreover, it is reported that almost 1500 Nepalese youths are migrating daily to seek better employment opportunities.

### 2.3 Dynamics of labour market situation

It is mentioned earlier that large majority of Nepalese labour force are engaged in agricultural occupation. Slight shift of labour force from agricultural to non- agricultural occupation can be observed during the last two decades; however the rate is not in desired level. Large proportion of population is adopting subsistence agriculture as a major occupation, but the productivity of agriculture is very low because of the traditional agricultural practices and lack of year round irrigation. According to Nepal Living Standard Survey 1995/96, out of the total proportion engaged in agriculture, 12.5% were wage-employed and 70.7% were self-employed, whereas 2.3% and 61.3% are the corresponding figure revealed by NLSS 2010/11. In the same period, wage employment in non-agriculture sector increases by 5 percentage point (7.7% to 12.7%). Similarly the increment in wage employment is observed 3 percentage points (9.5% to 12.6%) during the same period of time. The Table 2.2 gives the detail information regarding the sector wise composition of labour force.

During the last two decades, Nepalese labour market sector witnessed positive symptoms including increase in labour force participation rate, employment proportion, incidence of child labour, displacement of worker form unproductive sector by productive sectors. The data in table 2.1, gives the comparative status of labour market indicators among three subsequent living standard surveys from 1995/96 to 2010/11. According to NLSS 2010/11, unemployment problem is not severe in Nepal, however underemployment seems more challenging. Only 46.2% of population are in full time employment (more than 40 hours in a week) however sizeable proportion (31.7%), works less than 20 hours a week. Similarly, 22.1% of population works between 20 to 39 hours. Considering them only  $\frac{1}{4}$  and  $\frac{3}{4}$  time employed, total unemployment rate becomes alarming (31.1%)<sup>1</sup>. But according to the survey, unemployment rate is decreased by 1.6 percentage point during the last one and half decade (3.4% to 1.8%). Detail information is presented in table 2.1.

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<sup>1</sup> Unemployment rate = unemployed proportion (1.8%) +  $\frac{1}{4}$  \* 31.7% (employed 1-19 hours per week) +  $\frac{3}{4}$  \* 22.1% (employed 20-39 hours per week) or unemployment rate = 1.8% + 23.7% + 5.5 = 31.1%

Table 2.2: Trend Analysis of Employment Status

Description	Nepal Living Standard Survey		
	1995/96	2003/04	2010/11
Employed Population (%)	67.2	74.3	78.3
Unemployment Population ( %)	3.4	2.9	1.8
Not in labour Force (%)	29.4	22.8	19.9
Labour Force Participation Rate	70.6	77.2	80.1
Unemployment Rate (age 10-14 years)	4.9	3.8	2.2
Unemployment Rate (age 15-24 years)	7.9	3.4	1.1
Employed by Number of Hours of Work			
1-19 Hours	21.5	24.4	31.7
20-39 Hours	25.6	23.4	22.1
40 Hours and Above	52.9	52.2	46.2
Share by Main Sector of Employment			
Share of Self Employment in Agriculture	12.2	6.8	2.8
Share of Wage Employment in Agriculture	70.7	64.3	61.3
Share of Self Employment in Non-Agriculture	9.5	10.2	12.6
Share of Wage Employment in Non-Agriculture	7.7	9.3	12.7
Share of Extended Economic Work		9.4	10.7
Incidence of Child Labour, Age 5-14 Years		31.4%	27.6%

Source: Nepal Living Standard Survey, 2010/11)

World Economic Forum has been publishing a Global Competitiveness Report since 2001. In the report, competitiveness of any country is measured on the basis of twelve different indicators mentioning them as pillars. Labour Market Efficiency is one of those pillars, which is further calculated on the basis of nine different aspects of labour market sector. The aggregate score of labour market efficiency index is 3.61 as per the report of 2007/08, whereas the respective score is decreased to 3.58 in 2011/12 which further depicts the ineffectiveness of present labour policies.

## 2.4 Migration status by major districts

In present years, foreign labour migration badly influenced the traditional socio-economic status of economy. Youths from all districts are migrated to foreign employment. Basically, those hilly and tarai districts are highly affected by this foreign employment which are relatively accessed with various means of transportation and information technology. Peoples from Karnali Region are found less motivated for foreign employment whereas peoples from Tarai Regions are highly motivated to it.

On one hand, large areas of agricultural land in the villages are barren because of outflow of of working age population in significant proportion. As a result, production of agricultural goods decreases which creates over dependency on imports. On the other hand, several studies revealed the positive impact of remittance in the poverty reduction in the country.

The report of National Planning Commission has concluded that poverty level of Nepalese population has reduced to 31% from 38% even during the situation of political conflict. Some economists argue that this reduction of poverty level is mainly attributed to remittance. But, the comparative analysis of migration and poverty level of districts suggests that pro-poor households are less likely to receive remittance. Direct benefit of remittances therefore can't be felt by these extremely poor however, indirect effect is affected by a country as a whole.

The districts in Table 2.3 are top ten districts with the highest share in migration as per the data of fiscal year 2070/71. The highest numbers of jobseekers were migrated from Dhanusa District



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which occupies 4.95% of total migrants in the corresponding year, followed by Jhapa (4.07%), Morang (4%), Siraha (3.99%) respectively. Detail figure is in the Table.

Table 2.3: Migration by Major Districts

SN	Name of District	Number of Migrant	% of Total Migrants
1	Dhanusa	23099	4.95
2	Jhapa	19004	4.07
3	Morang	18678	4.00
4	Siraha	18613	3.99
5	Mahottari	17056	3.66
6	Saptari	14696	3.15
7	Sarlahi	14437	3.10
8	Nawalparasi	13929	2.99
9	Sunsari	13408	2.87
10	Rupandehi	12725	2.73

Source: Department of Foreign Employment 2070

Similarly, the Table 2.4 depicts the bottom ten districts with least number of migrants. The number of migrants from Dolpa Districts (22, 0.01%) is lowest among the 75 districts followed by Mustang 50, Manang 72, Humla 92 and so on. The detail figure of migrants and their respective proportion to total migrants population is depicted in the Table.

Table 2.4: Bottom Ten Labour Sending Districts

SN	Name of Districts	Number of Migrants	Share in Total Migrants	Remarks
1	Dolpa	22	0.01	
2	Mustang	50	0.01	
3	Manang	72	0.02	
4	Humla	92	0.02	
5	Mugu	151	0.03	
6	Jumla	332	0.07	
7	Bajura	583	0.12	
8	Doti	699	0.15	
9	Kalikot	779	0.17	
10	Bajhang	781	0.17	

Source: Department of Foreign Employment Board 2071

### 2.5 Distribution of Migrants as per the development Region

The Table 2.6 depicts the number of migrants as per the development region. Central Development Region has the highest (34.44%) share of migrants in total number of migrants followed by Eastern Development Region (30.16%), Western Development Region (21.04%). The Far-western Development region has the least proportion (3.1%) in the migrants share. Detail distribution is depicted in the table.

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Table 2.6: Distribution of migrants by development region

S N	Name of Development Region	Number of Migrants	Percent	Remarks
1	Eastern Development Region	140,668	30.16	
2	Central Development Region	160,663	34.44	
3	Western Development Region	98,138	21.04	
4	Mid-Western Development Region	52,506	11.26	
5	Far Western Development Region	14,464	3.10	
6	Total	4,66,439	100.00	

Original Data Source: Department of Foreign Employment, 2071

If the districts are ranked as per the migrants' share in total population, the ranking order of top 10 migrating districts are quite different. In the share with the total population, Khotang District has the highest share of migrant in its total population where 41 in every one thousand population migrated for foreign employment. Similarly, Bhojpur, Tehrathum, Panchther, Rolpa, Dhanusha are the following districts with respectively highest share with total population in descending order. Dhanusa district which has the highest number of migrants ranked at 6<sup>th</sup> position as per the share with total population.

Table 2.7: Ranking As Per the Share of Total Population.

SN	Name of District	Number of Migrants	Share in total population (in 1000 Population)	Remarks
1	Khotang	7635.00	41.11	
2	Bhojpur	6251.00	37.97	
3	Tehrathum	3215.00	34.77	
4	Panchther	6065.00	34.74	
5	Rolpa	6674.00	34.06	
6	Dhanusa	23099.00	34.00	
7	Makwanpur	9628.00	33.80	
8	Myagdi	3417.00	33.57	
9	Siraha	18613.00	32.75	
10	Dhankuta	4746.00	31.87	

Original Data Source: Department of Foreign Employment, 2071

### 3. Analysis

This report is composed of two types of analysis or assessment- demand side and supply-side. The published advertisements were considered as major source for demand side assessment; however the supply side assessment was mainly relied upon the information provided by HR supplier agencies. Both of these analyses have crucial role to dig out the findings, draw the conclusion and suggest the recommendations.

#### 3.1 Demand Side Assessment

This part of report is mainly based on the information provided in the advertisements published by the foreign employment agencies to fulfill their obtained demand from abroad. In Foreign Employment Act 2064, there is a provision for compulsory advertisements of such positions in national daily newspaper incorporating the predetermined information regarding the working



conditions and offered facilities. This information must incorporate the proposed salary and other fringe benefits, tentative costs, minimum qualification, name of employers' company and country, working conditions among others.

This report is based on the advertisement published in Kantipur National Daily which has the largest coverage of such advertisements as per the similar studies in previous year. The advertisements published within 1<sup>st</sup> of Shrawan to end of Paush 2071 were covered. A format was developed in SPSS- a statistical program and 5862 data was entered and analyze them accordingly.

### 3.1.1 Country wise demand distribution

Although more than 109 countries are opened up for foreign employment to Nepalese Workforces, analysis in this report has explored notably fewer countries (16 countries) from which demand of workforces has been received. Among these sixteen countries, Qatar, UAE, Malaysia and Saudi Arabia are those countries from which remarkable demand of human resource has been receiving.

The share of Qatar in the total demand is the greatest (34.2%) among the sixteen countries followed by UAE 28.3%, Malaysia 15.9 % and Saudi Arabia (13.38%). Likewise, the received demand from Kuwait (4668), Bahrain (3878) and Oman (3366) are also in significant number. No notable figure of demand had been received from rest of the countries with in the analyzed period. The detail of the country wise distribution of workforce demand is presented in Table 3.2. Although, South Korea is also the major destination country for labour migration from Nepal, it was not found in regular advertisements since different procedure is adopted to select the workforce to South Korea<sup>2</sup>.

Table 3.2: Advertisements by Country

S N	Name of destination country	Number of Advertised Cases	Percent	Number of Demand	Percent
1	Qatar	2346	40.0	56996	34.2
2	UAE	1940	33.1	47029	28.3
3	Malaysia	317	5.4	26499	15.9
4	Saudi Arabia	423	7.2	22169	13.3
5	Kuwait	214	3.7	4668	2.8
6	Oman	268	4.6	3878	2.3
7	Bahrain	272	4.6	3366	2.0
8	Cyprus	30	0.5	493	0.3
9	Jordan	2	0.0	400	0.2
10	Europe	19	0.3	340	0.2
11	Macau	11	0.2	310	0.2
12	Lebanon	1	0.0	100	0.1
13	South Korea	5	0.1	67	0.0
14	Turkey	2	0.0	67	0.0
15	Japan	10	0.2	56	0.0
16	Hong Kong	2	0.0	22	0.0
17	Total	5862	100.0	166460	100.0

Source: Advertisement Analysis 2015

<sup>2</sup> EPS (Employment Permit System) was the process under which workers were selected for South Korea.

### 3.1.2 Advertisement by month

The advertisement published from Shrawan to Paush mainly in Kantipur National Daily is only the source of information for the analysis in this part. The table below depicts month wise distribution of both Advertised Cases and Advertised Number, however this figure does not reflect the general situation of advertisement. As it mentioned earlier, the number 5862 was neither the number of total advertisements published within the analyzed period nor it was sampled out following any of the random sampling procedures.

Table 3.1: Distribution of Advertisements by Month

SN	Months	Advertise Cases	Percent	Advertised Number	Percent
1	Shrawan	909	15.5	20429	12.27
2	Bhadra	1207	20.6	33398	20.06
3	Ashwin	597	10.2	17744	10.66
4	Kartik	476	8.1	14780	8.88
5	Mangsir	1651	28.2	40914	24.58
6	Paush	1022	17.4	39195	23.55
7	Total	5862	100.0	166460	100.00

Source: Advertisement Analysis, 2013/14

The two figures depicted in the Table 3.1 and after this, under the title of Advertised Cases and Advertised Number are different. Single advertisement used to publish for a same nature of job, however the demanded number had ranged from one to many. The figure in the third column indicates only the number of advertisements whereas the later data counted the demanded numbers as well. Altogether 5862 cases of advertisement were entered and analyzed in this study which had announced the demand of 166,460 numbers of workforces. Among the entered data, majority (27.72%) were advertised in Mangsir followed by Paush (17.21%) and Kartik (8.03%). Somehow the advertised numbers are also proportionately similar to the advertised cases. The detail of this distribution is depicted in Table 3.1.

### 3.1.3 Advertisement by occupational categories

During the analyzed period, demand for 166,460 workforce under various job titles were obtained, which is too long to present in the content and understand by the readers. The job titles and their distribution are therefore presented in the annex I. The Table 3.3 depicts eight major demanded skills jobs including Security Guard, Light Driver, Waiter, Mason, Electrician etc. In the advertisement, the demand of driver was also obtained in significant number, however it is disaggregated in various categories like heavy driver, valet driver, taxi driver, Larry driver etc. The analysis is also made accordingly. (See Annex I for detail breakdown).

Table 3.3: Ten Major Demanded Occupations

S N	Name of Demanded Jobs	Advertisement Cases	Advertisement Number
1	Security Guard	396	23936
2	Light Driver	129	4584
3	Waiter	169	4289
4	Mason	129	4203
5	Carpenter	136	4155
6	Salesman	108	3850
7	Heavy Driver	149	3498
8	Electrician	145	3371

Source: Advertisement Analysis 2015

### 3.1.4 Demand by skill category

These demanded jobs are further classified as per the level of working efficiency or competency such as Unskilled, Semi-skilled, Skilled and Professionals. Although universal or wide acceptable classification of these terms are difficult to find, attempt was made to define these terms based on international standard and national practice. Moreover, error-free classification of these jobs is more difficult without the knowledge of their duties and responsibilities which was not available in the advertisements. Attempt was made to classify the advertised posts as the under mentioned definition with the help of workshops having adequate participation of returnee workers (detail in Annex II).

**Unskilled jobs:** Those natures of jobs that can be performed without having prior experience or knowledge about the jobs and the offered remuneration is also relatively lower.

**Semi-Skilled jobs:** Those types of jobs that require some level of prior experience or knowledge but individuals are not capable enough to perform without the supervision or guidance of seniors. Moreover, the offered remuneration for such jobs is more than 20% than that received by average unskilled job holders.

**Skilled Jobs:** Those types of Jobs that need sufficient level of prior experience or knowledge and individuals are capable enough to independently perform without the guidance of seniors. Moreover, the offered remuneration is also more than 50% than that received by average unskilled job holders.

**Professional Jobs:** Those categories of knowledge-based jobs which require higher level of academic degree and prior knowledge to perform and the offered remuneration is also lucrative.

The titles of the jobs mentioned in the advertisements were classified based on the above mentioned definition. As per this classification, remarkable demand was obtained for skilled workers under various sectors from construction, service and agriculture sector. Among the total demanded numbers, 39.2% demands are of unskilled workers, followed by 34.5% of skilled workers, 24.4% are for semi-skilled and remaining 1.7% demanded numbers falls under professional category. The Table 3.4 depicts the detail of this classification

Table 3.4: Demand by Skill Category

SN	Name of country	Advertisement Cases	Percentage	Advertised Number	Percentage
1	Unskilled	1179	20.1	65405	39.2
2	Semi-skilled	1229	21.0	40628	24.4
3	Skilled	3116	53.2	57573	34.5
4	Professional	338	5.8	2854	1.7
5	Total	5862	100.0	166460	100

Source: Advertisement Analysis 2013/14

### 3.1.5 Variation in salary level

Exploration of information about the offered salary is also made mandatory in the advertisement by the Foreign Employment Act 2064. This information is intensively analyzed in the study. The salary offered for these advertised posts ranges between Rs. 18,200 to Rs. 367,500. The mean of that figure is Rs. 42,796 and standard deviation is 24,366.29. Normal distribution can't be observed

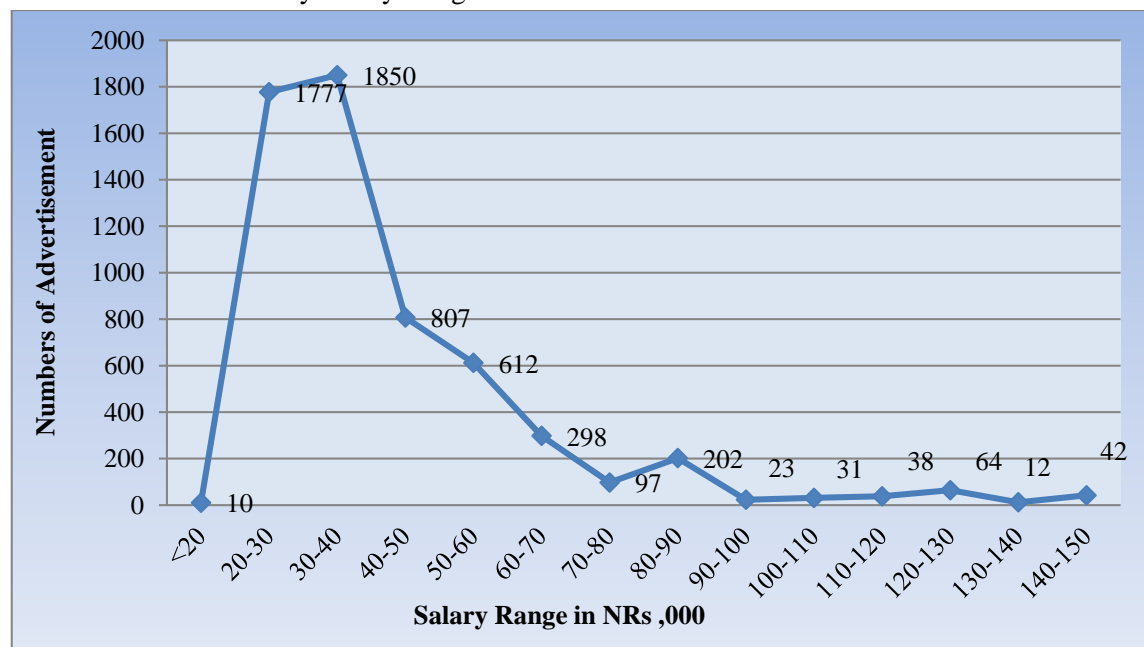
in the graph. Moreover it is positive skewed and mesokotic. The detail description of the figure is depicted in Table 3.5.

**Table 3.5: Descriptive Statistics**

	N	Minimum	Maximum	Mean	Std. Deviation	Skewness		Kurtosis	
	Statistic	Statistic	Statistic	Statistic	Statistic	Statistic	Std. Error	Statistic	Std. Error
Salary in terms of Nepali Currency	5862	18200	367500	42794.2	24359.7	3.8	.032	27.221	.064
Valid N (listwise)	5862								

Source: Statistical Analysis, 2015

**Chart 3.1: Distribution by Salary Range**



Source: Advertisement Analysis, 2015

The advertised cases were re-categorized as per the range of offered salary in the interval of every 10,000 beginning from below Rs. 20,000 to over Rs. 150,000/- . The Chart 3.1 in the coming pages reflects the detail of this distribution. The large majority of advertised cases (1850) falls between the interval of Rs. 25,000/- to Rs. 30,000/- . Almost equal number of cases (1777) also lies in the salary interval of 20,000- 30,000. Then after, the frequency decreases while moving towards higher interval of salary. As it mentioned earlier, the distribution is positively skewed i.e. large majority of advertised cases offered lower amount than the mean salary scales of the distribution. Although, this is the demand situation, the supply situation can also resemble the same trend since supply is the function of demand. It further justifies the lower income level of Nepalese migrant workers as a result of lower level of skills.

### 3.1.6 Sources of variation in salary

As it is explained in previous topic, large variation in salary is found among the migrant workers. This variation does not depend upon a single factor but on the numbers of factors such as level of

skill and education of individual workers, economic status of destination country and so on. The coming sub topics are devoted to analyze discuss on the role of these factors for variation in income level of individuals.

### 3.1.6.1 Salary level by destination country

Large variation in the salary level was found among the destination countries. An average (regardless of skills) individual who wants to migrate to Japan can expect to earn Rs. 127,030 per months whereas the corresponding figure for Malaysia is only Rs. 27,956. Similarly, the expected income of individual worker is different for different country. The expected salary of such type of migrant workers in Hong Kong is Rs. 101,500 whereas only Rs. 48,217 can be expected in Cyprus and so on. The value of standard deviation in the last column of Table 3.6 shows the in-country variation of salary level. The in-country variation of salary level is the highest in UAE (Rs. 27,885) and the lowest in Malaysia (Rs.3970). While conducting the one-way-ANOVA test of variation among destination countries, this variation is also found statistically significant<sup>3</sup>.

Table 3.6: Distribution of Salary by Destination Country

S N	Name of Destination country	N	Mean	Std. Deviation
1	Malaysia	317	27956.8	3970.0
2	Qatar	2346	44672.0	24138.4
3	Saudi Arabia	423	35117.8	18820.3
4	Kuwait	214	39047.9	11600.5
5	UAE	1940	45322.0	27879.5
6	Bahrain	272	39478.0	18627.8
7	Oman	268	37820.4	15279.2
8	Jordan	2	26163.0	0.0
9	Japan	10	127030.8	12947.3
10	Hong Kong	2	101500.0	0.0
11	Macau	11	83281.8	28032.2
12	Lebanon	1	22356.0	
13	South Korea	5	72800.0	54970.2
14	Cyprus	30	48217.7	21053.8
15	Europe	19	43458.2	4509.5
16	Turkey	2	43351.0	0.0
17	Total	5862	42794.2	24359.7

Source: Advertisement Analysis, 2013/14

### 3.1.6.2 Salary as per the skill category

As it is mentioned above, advertisements were classified based on the level of skills. As per this classification, the variation in salary level among various skills categories like Unskilled, Semi-skilled, Skilled and Professionals is also found statistically significant to each other while conducting one-way-ANOVA test of variation<sup>4</sup>.

<sup>3</sup> The F-value (26.13) obtained from one-way-ANOVA is significant at 0.00 confidence level.

<sup>4</sup> The F-value (380.10) obtained from one-way-ANOVA is significant at 0.00 confidence level.

The Table 3.6 shows the detail of the variation in salary as per the skill-wise classification. Large scale of variation in the salary level was found. An unskilled worker can expect to earn Rs. 28,529 from foreign employment whereas the corresponding expectation of semi-skilled, skilled and professional workers are Rs. 40,167, Rs. 45,129 and Rs. 80,570 respectively. The small difference between skilled and semi-skilled category may be due to the confusion in the classification between them, since detail job responsibilities were not available to classify. Even though, the salary level between skilled and semi-skilled categories is small it is statistically significant. The obtained F value (53.05) from the independent sample t-test is found significant more than 99% confidence level.

Table 3.7: Offered Salary by Skilled Category

S N	Categories of Skills	Number of Cases	of Advertised	Mean	Std. Deviation
1	Unskilled	1179		28529.83	11616.8
2	Semi-skilled	1229		40167.31	16374.8
3	Skilled	3116		45129.72	20012.1
4	Professional	338		80570.96	54320.9
5	Total	5862		42794.18	24359.6

Source: Advertisement Analysis, 2013/14

The standard deviation depicted in the last column measures the inter-categorical variation of salary. This variation is smallest (Rs. 9175) in unskilled category but largest (Rs. 43063) in professional category.

The demanded occupations were reclassified in to three categories merging semiskilled and skilled as a name of skilled. Among the unskilled categories, Japan seems as the highest salary offering country. An unskilled worker can expect to earn Rs. 119906/month migrating to Japan whereas the corresponding figure for Malaysia is Rs. 27,286. Although, countries like Japan and Europe are also offering notable amount of salary, however the demand in those countries are significantly lower. Similarly UAE emerged as the highest salary offering countries for skilled worker in notable number. The expected salary level for a skilled worker in UAE is Rs. 45,632. In the Professional category, only three countries found demanded workforces in notable number whose figure was reliable to mention. Significantly lower demand was obtained from rest of the countries. A person capable to perform professional jobs can expect to earn Rs. 84,812 from migrating to Qatar whereas s/he expect to earn only Rs. 40,139 from Kuwait. The Table 3.7 depicts the detail information in it.

Table 3.8: Salary by country and skilled category

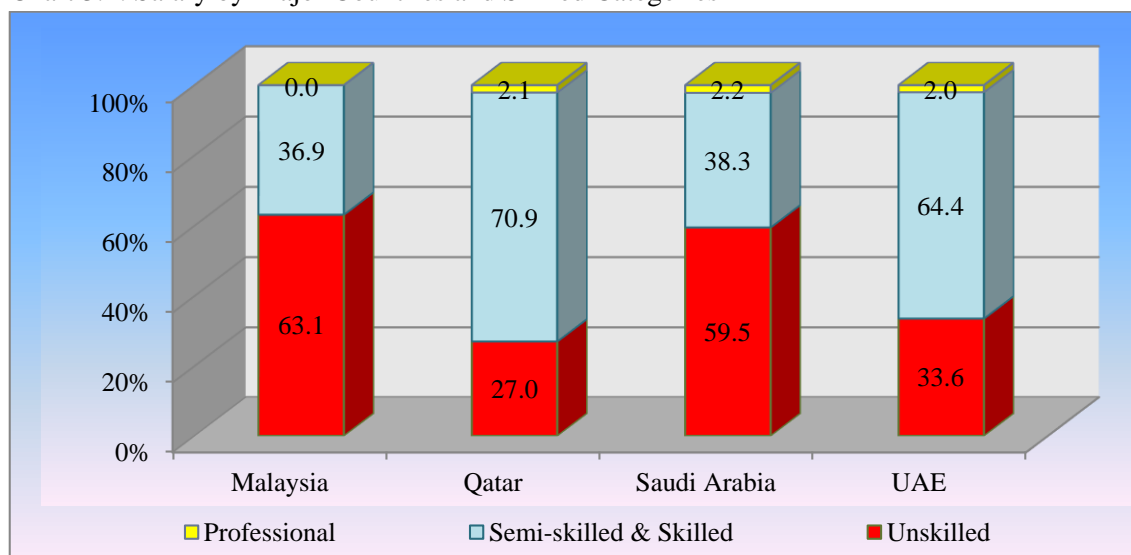
SN	Name of Destination Country	Unskilled		Semi-skilled and skilled		Professional	
		Number	Mean Salary	Number	Mean Salary	Number	Mean Salary
1	Malaysia	185	27264.86	132	28926.61		
2	Qatar	307	26975.66	1904	44679.27	135	84812.15
3	Saudi Arabia	164	25385.71	238	37711.61	21	81724.00
4	Kuwait	43	28946.65	166	41631.60	5	40139.00

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SN	Name of Destination Country	Unskilled		Semi-skilled and skilled		Professional	
		Number	Mean Salary	Number	Mean Salary	Number	Mean Salary
5	UAE	370	30107.43	1432	45632.98	138	82887.90
6	Bahrain	38	26218.45	222	40353.74	12	65266.42
7	Oman	27	26937.11	217	37331.04	24	54488.25
8	Jordan	-	-	2	26163.00	-	-
9	Japan	2	119906.00	8	128812.00	-	-
10	Hong Kong	-	-	2	101500.00	-	-
11	Macau	-	-	9	83122.22	2	84000.00
12	Lebanon	1	22356.00				
13	South Korea	-	-	4	48750.00	1	169000.00
14	Cyprus	24	41674.29	6	74391.50	-	-
15	Europe	17	43184.24	2	45787.00	-	-
16	Turkey	1	43351.00	1	43351.00	-	-
17	Total	1179	28529.83	4345	43726.08	338	80570.96

Source: Advertisement Analysis 2015

Chart 3.2: Salary by Major Countries and Skilled Categories



Source: Advertisement Analysis 2015

The Chart 3.2 reflects the composition of workforce as per the level of skill by major destination countries such as Malaysia, Qatar, Saudi Arabia and UAE. Among these four countries, Malaysia has the largest share of unskilled workers (63.1%) whereas Saudi Arabia has the highest share of skilled workers (59.5%). Malaysia don't has any demand of professional workers whereas almost equal proportion of demand of professional workers received from rest of the three countries. The chart depicts the detail if it.

### 3.1.6.3 Variation of salary by job category

As it mentioned earlier that long list of job titles were obtained from the analysis. These job titles are not only skill specific but also working country or working sector specific. The same type of job was called differently in different countries. These job titles were subsumed on the basis of type and nature of work they have to perform and given a common name. The numbers of demand



as per these job titles are mentioned in Annex I. The expected salary level for these job titles having significant demand in foreign employment are only mentioned and discussed here.

The various jobs under professional category were found offered lucrative salary. Doctors, Engineers, Managers, Chef (of various categories) are the occupations which are offered more than Rs.100,000 salary. Similarly, some occupations like foreman, security guard, plumber, electrician, carpenters are offered salary between 40-60 thousand in terms of Nepalese currency. Labour, agricultural worker, construction worker, factory worker, general cleaner are the representative unskilled jobs who only gets salary below Rs. 40000 in most of the cases.

### 3.1.7 Distribution by educational qualification

Although educational qualification is not taken as signal for the efficiency in case of foreign employment. Among the 5862 advertised cases, only 1219 cases were found mentioned the qualification column. Out of these 1219 cases, basic literacy was mentioned as minimum requirements for 777 advertisement cases. Similarly, 132 cases mentioned SLC as minimum qualification for workers. In 243, higher secondary was mentioned as minimum qualification. Only thirty two and four cases were found where bachelor degree and masters' degree respectively were indicated as minimum qualification. In large majority (4624) of cases, experience and efficiency in similar jobs are mentioned as a basic necessity however neither of the above mentioned educational qualification is mentioned as eligibility criteria.

The chart ## reflects the expected salary and migration cost as per the educational qualification. Both the expected salary and migration cost of individuals is depends upon their educational qualification. The upward moving salary curve clearly indicates that expected salary increases with increase in educational qualification however the relation is almost opposite with migration cost. An individual with master degree can expect highest salary (Rs. 146,040) in this distribution however their average probable cost is lowest (Rs.10,000).

### 3.1.8 Tentative expenditure

Since, mentioning tentative cost for migration was mandatory as per the foreign employment act 2064, more than 95% advertisement cases was found mentioning the tentative expenditure for migration. This analysis was carried out by selecting the cases in which such cost was mentioned. Out of 5862 advertised cases, 5644 cases were selected and included in the analysis. Turkey was found most expensive destination where migration cost was Rs. 85,000 followed by Cyprus Rs. 74,000 and Europe (Country not specified) Rs. 71,000.00. All of these countries have only small share in the foreign employment market. If we consider only those countries which occupies significant share, Malaysia was found as an expensive destination where the tentative cost of migration is Rs. 52,916.00 followed by UAE Rs. 43,902.00 and Kuwait Rs. 42,395. Qatar was found the cheapest destination among those countries which provides significant numbers of employment to Nepalese youths. The tentative cost for migrating to Qatar was Rs. 16,937. This variation of cost as per the country is statistically significant at 99.99% confidence level with F-value 165.15.

Table 3.9: Migration Cost by Country

SN	Name of destination country	N	Mean	Std. Deviation
1	Malaysia	312	52916.84	29526.8
2	Qatar	2252	16937.09	9097.3
3	Saudi Arabia	408	23032.44	25561.2
4	Kuwait	210	42395.25	19194.4
5	UAE	1848	43902.34	26497.9

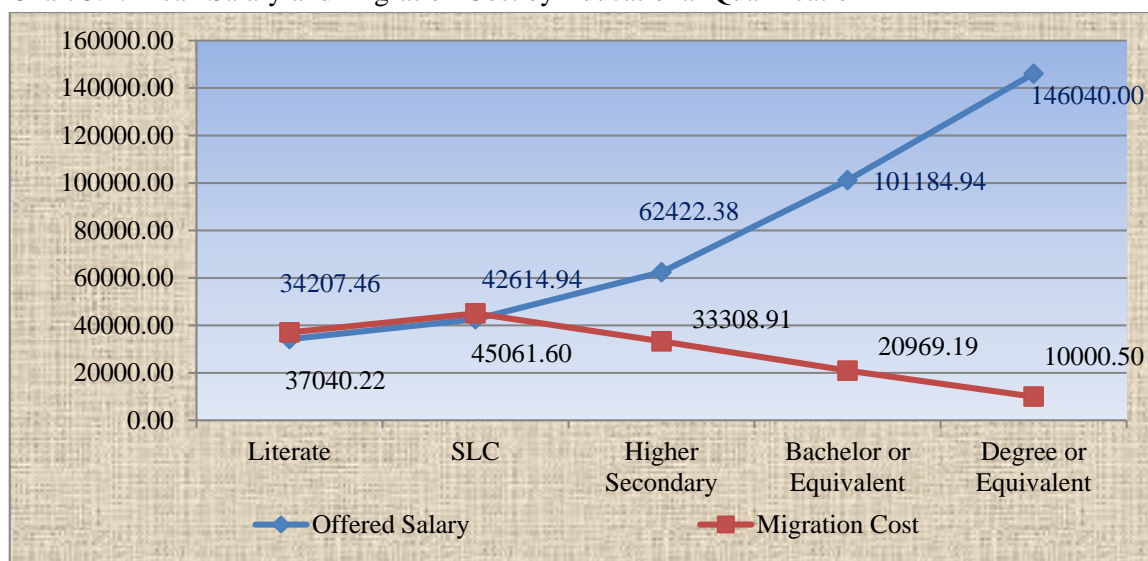


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6	Bahrain	272	33345.91	26669.3
7	Oman	262	33988.61	18993.4
8	Jordan	2	5000.00	.000
9	Japan	9	49444.44	1666.7
10	Hong Kong	2	25000.00	.000
11	Macau	11	66681.82	18631.0
12	Lebanon	1	70000.00	.
13	South Korea	5	10000.00	.000
14	Cyprus	30	74833.43	37998.964
15	Europe	18	71666.78	26121.563
16	Turkey	2	85000.00	.000
17	Total	5644	31382.48	24959.984

Source: Advertisement Analysis, 2013/14

Chart 3.1: Mean Salary and Migration Cost by Educational Qualification



Source: Advertisement Analysis 2015

Table 3.10: ANOVA test for salary variation among countries

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	1074512579041.105	15	71634171936.074	165.155	.000
Within Groups	2441080955848.494	5628	433738620.442		
Total	3515593534889.599	5643			

Source: Advertisement Analysis, 2013/14

### 3.1.9 Variation of migration cost by level of skill

There found large variation in migration cost as per the level of skills; however this variation was also found statistically significant. The obtained F-value in one-way-ANOVA test (2.558) is significant at only 99.9% confidence level.

Table: ANOVA table on cost by skills group

Expanses to be submitted					
	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	26927404193.644	13	2071338784.126	3.343	.000
Within Groups	3488666130695.952	5630	619656506.340		
Total	3515593534889.596	5643			

Source: Advertisement Analysis, 2015

The one-way-ANOVA test explores the variation of migration cost among the four categories of level of skills. If the difference is compared only between Unskilled and Professional categories by conducting the independent sample T-test the obtained F-Value is statistically significant at 99% confidence interval. If we observe directly the amount of cost among these three categories, the average cost of migration for unskilled worker is highest (Rs. 37,946), whereas the corresponding figures for Semi-skilled, Skilled and professional workers are Rs. 34,051, Rs. 28,146 and Rs. 28,606 respectively.

Table 3.11: Migration Cost by Level of Skills

SN	Skilled Categories	N	Mean	Std. Deviation
1	Unskilled	1135	37946.56	29636.885
2	Semi-skilled	1184	34051.00	24940.959
3	Skilled	3000	28146.65	22429.051
4	Professional	325	28606.35	23813.057
5	Total	5644	31382.48	24959.984

Source: Advertisement Analysis, 2013/14

### 3.1.10 Provisions of extra facilities

Workers are provided extra facilities like overtime, food facilities, and accommodation facilities. Accommodation facility was found mentioned almost in every advertisements, however food facility is not mentioned in that proportion. Additional analysis was no more required regarding the overtime facility since it is stated in almost every advertisement that it will be provided as per the company rule. Regarding the food facility, 87.8% of advertised posts were offered food facilities. Unlike the 87.8% in total figure, the corresponding figure of unskilled worker is only 81.3% where as that of Skilled and Professionals are 88.9% and 95.3% respectively. While conducting the Chi-square test of association, the calculated figure of Chi-square coefficient (22.888) is significant at almost 100% confidence level. This is the evident of strong association between provision of food facilities and level of skills.

Table : Provision of food facilities by skill categories

Provision of food facilities	Skill categories			Total
	Unskilled	Semi-skilled and Skilled	Professional	
yes	Count 959 (81.3%)	3864(88.9%)	322(95.3%)	5145(87.5%)
No	Count 220(18.7%)	481(11.1%)	16(4.7%)	717(12.2%)
Total	Count 1179(100%)	4345(100%)	338(100%)	5862(100%)

Table :Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	68.542 <sup>a</sup>	2	.000
Likelihood Ratio	67.977	2	.000
Linear-by-Linear Association	68.221	1	.000
N of Valid Cases	5862		

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 41.34.

Source: Statistical Analysis 2015

### 3.1.11 Comparison with previous studies

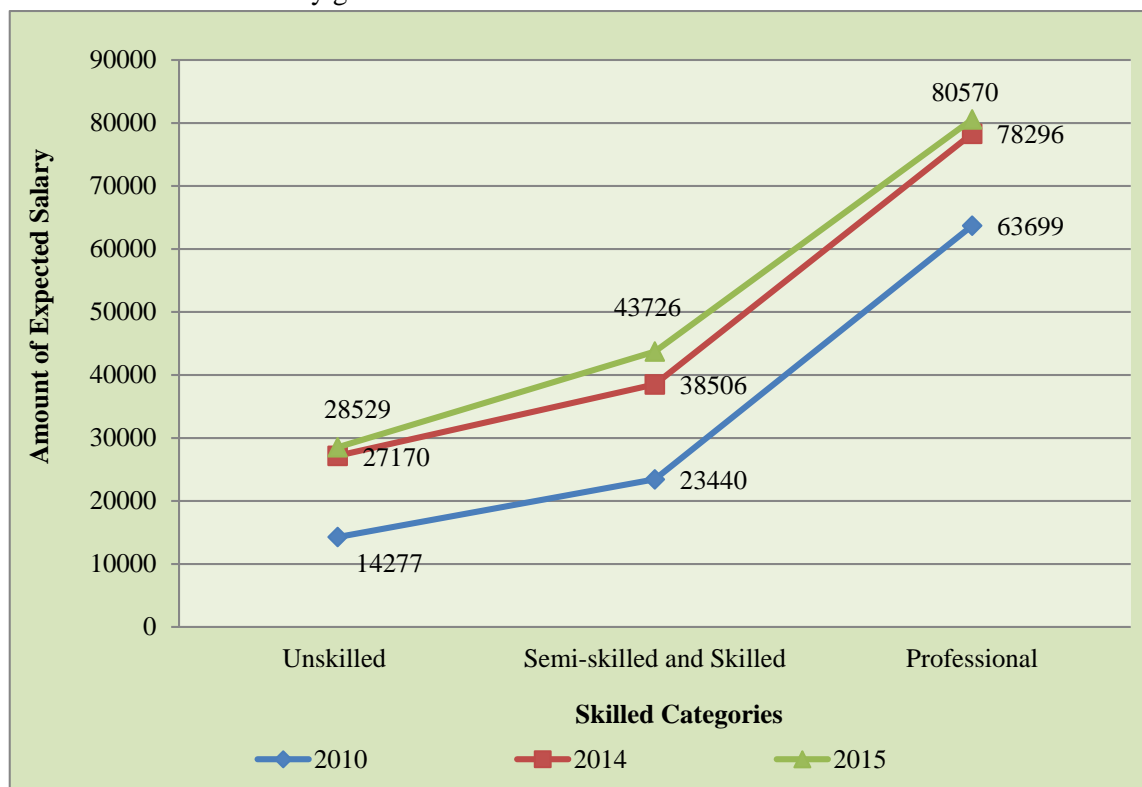
Two similar studies regarding advertisement analysis had already been conducted by CTEVT, Research and Information Division. One is in 2010 and another is in previous year (2014). Attempt was made to compare the some of the variables among the studies which may be a signal for long

term trend from 2010 onwards. This topic compares the salary and cost of migrant workers and their skill wise and country wise composition.

### 3.1.12 Trends of cost and salary

In all three studies consecutively conducted in 2010, 2014 and 2015, the identified job occupations are categorized in to three categories as per their skills level. They are unskilled, semi-skilled and skilled; and professional. Each and every year new and specified occupations were identified so categorization is not same in every year, however that was based on the common definitions as mentioned earlier. Presently (2015), an unskilled worker can expect to earn around NRs. 28,000 per months; whereas corresponding expectations in 2010 and 2014 were NRs. 14,277 and NRs. 28,529 respectively. This trend suggested that the average salary level of unskilled worker has increased by almost 100% in last five years. Similar trend can be found while analyzing the salary increment of semi-skilled and skilled; and professional workers during the analyzed years mentioned above. But, as per the analysis of growth rate, the rate is higher for unskilled worker and lower for semi-skilled and skilled and professional workers. The chart 4.1 visualized the growth trends of all of these three categories mentioned above.

Chart 4.1 : Trend on salary growth



Source: Advertisement analysis 2015, CTEVT 2010 and CTEVT 2014

### 3.1.13 Trend on demand

The Table 4.1 shows trend of demand of five major skilled occupations in foreign employment in the year 2010, 2014 and 2015 during the same period. These trades are Plumber, Welder, Electrician, Mason and Carpenter. The share of these five trades in total demand is only 6.8% in 2010, however this proportions has increased to almost 12% in 2014 and again decreased to 8% in 2015. The Table depicts the trends of individual trade in detail.

**Table 4.1: Trends of five major occupations**

S N	Occupations	Demanded Numbers in		
		2010	2014	2015
1	Plumber	353	1407	1876
2	Welder	322	645	1281
3	Electrician	526	2175	3371
4	Mason	2096	3502	4642
5	Carpenter	1158	3652	4180
6	Total of five occupations	4455	11381	15350
7	Total demand	65352	95144	166460
8	Share in total	6.8	11.96	9.22

**Source: Advertisement Analysis 2015**

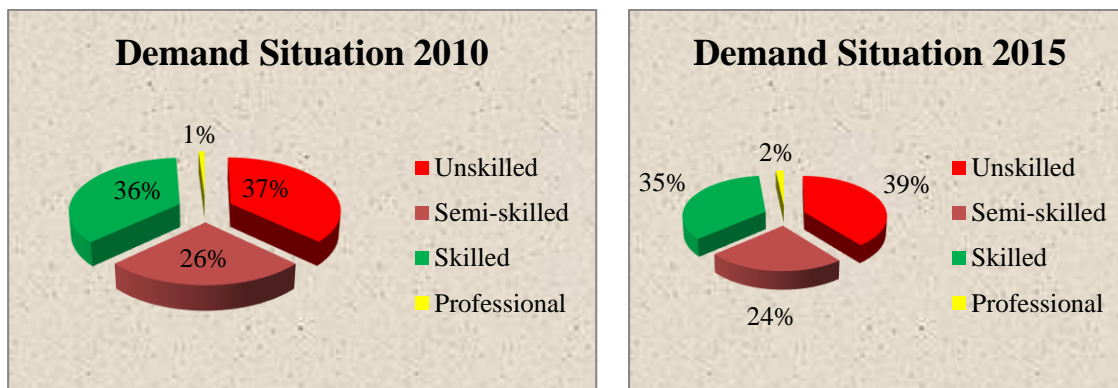
### 3.1.14 Dynamics of skill composition

Composition of human resources has the prominent role in economic development. The economic development is the function of productivity of resources which is further the function of composition of workforce. A country is said to be in favorable economic environment if the stock of human resource of any country has skilled and educated number in higher proportion. Opposite is the situation for otherwise cases. Economists have always been pointing out the lack of skilled human resources as a major problem of Nepal. The coming few paragraphs are devoted to explain the dynamics of skill composition.

In the last decade vocational training is getting due priority both from government and non-governmental sectors. Several bilateral and multilateral donor agencies are supporting these activities by investing substantial resources in it. Skill for Employment Project, Enhanced Vocational and Training (EVENT) Projects and presently Skill Development Projects are some notable endeavors for skilling Nepalese from government side. Likewise, Training for Employment Projects, F-Skills, Skill Nepal and Employment Fund were some notable efforts put from non-governmental sectors which have great contribution for imparting necessary skills in people. These collective efforts have largely contributed on the human resource development of the country. Because of these endeavor of skilling people, the share of skilled people in working population is increasing in present years. This increment of skills share is justified by comparing the skill composition of human resource in the country.

A study carried out by CTEVT Research and Information Division in 2010 have explored a skill composition of foreign demand. At that time total demand of foreign employment was composed of 37% unskilled, 26% semi-skilled, 36% skilled and 1% professional. Almost the same composition of demand was emerged also from this analysis which includes 39% unskilled, 24% semi-skilled, 35% skilled and 2 % professionals. This skill-composition of foreign demand in two different points in time is depicted in the Chart 3.3 (A and B). Unlike the previous, classification this time can be assumed closed to the reality because workshop was organized among returnee workers to classify the jobs.

Chart 3.3 Transformation of demand situation



Source: Advertisement Analysis 2010 and 2015

### 3.2 Supply Side Assessment

As mentioned earlier, supply side assessment was also carried out based on the information collected from foreign employment professionals/agents. There are 750 foreign employment agencies which are permitted to supply human resources from the country. Of the total, forty foreign employment agencies are purposively selected for such purpose.

A semi-structured interview format was developed for this purpose which was designed to collect various information regarding the demand and supply of Nepalese workforce for foreign employment. The agencies are requested to provide the data of number of migrants and the country they migrated in last 12 months via their agencies together with their respective occupation, sectors, and their efficiency level. Some opinion types of questions were also asked regarding the composition of skilled workforce within the migrated number as well as the share of demand of skilled jobs in the total abroad demand. Instead, the professionals associated with these agencies were also requested to share their knowledge about the demanded jobs and skill gaps in the Nepalese workers to the needs of foreign employers.

#### 3.2.1 Distribution by Occupation

In total, 21,689 migrant workers were reported migrated to foreign employment between Fagun 2070 to Magh 2071 via these forty manpower agencies. These migrant workers were migrated for 33 different occupations. Out of them, large proportions (31.03%) were found migrated as labour/helper, followed by Factor Workers (18.81%), both of these are unskilled jobs. Very few proportions of these migrants are skilled. Of the skilled migrants, Mason, Scaffolder, Electrician are in significant number. The analysis also shows that some Nepalese are also migrated for professional jobs like AC Technicians, Engineers, Nurse but their proportion is very negligible. The detail figure and its explanation is presented in the following topics.

#### 3.2.2 Engagement by Sector

The data in the Table 4.2 reflects that large numbers of migrant workers were migrated to work in the Construction or Engineering Sectors which covers 38% share in the pie followed by Manufacturing Sectors 36%. But only 5.33% share in the total were found involved in Tourism Sector. Similarly, very few proportions of migrant workers are found engaged in the Computer or ICT Sector (0.06) and Informal Sector. Significant numbers of migrant workers (15.87) are also engaged in the sectors other than the under mentioned six categories.

**Table 4.2: Number of Migrants by Sector**

S N	Sector for Employment	Number of Cases	Number of Migrants	Percentage
1	Construction & Engineering	110	8453	38.97
2	Manufacturing	25	8016	36.96
3	Tourism	21	1157	5.33
4	Agriculture	2	518	2.39
5	Housemaid or informal	3	90	0.41
6	Computer and ICT	2	12	0.06
7	Others	29	3443	15.87
8	Total	192	21689	100

Source: Advertisement Analysis 2015

### 3.2.3 Occupation by Skilled Level

The categories and figures in the Table 4.3, is about the efficiency level of migrants workers. This classification was based on the perceptions of the agency itself. No further classification exercise was carried out in this regard. The interviewees were asked to categorized the occupations under the given four options (Unskilled, Skilled, Semi-skilled and Highly Skilled or Professionals). As per their response, a complete majority (51.56%) of migrant workers are migrated as unskilled workers, followed by semi-skilled (31%) and skilled (16.33%). On the contrary, only negligible proportions of workers are migrated (0.39) in professional jobs.

**Table 4.3 Number of Migrants by Skills Level**

SN	Efficiency level of required Workforce	Number of Cases	Number of Migrants	Percentage
1	Unskilled	33	11167	51.56
2	Semi-skilled	88	6871	31.72
3	Skilled	65	3536	16.33
4	Highly Skilled	5	85	0.39
5	Total	191	21659	100.00

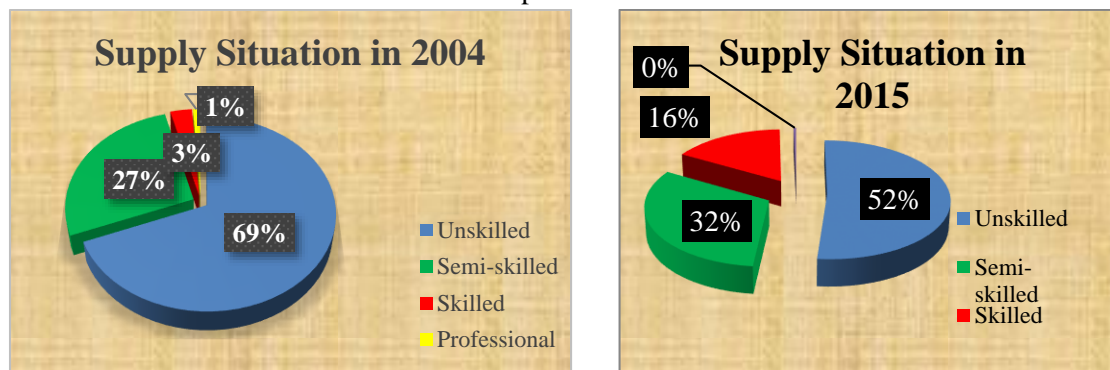
Source: Field Survey 2015

### 3.2.4 Transformation of supply composition

Neither a proper record system has been maintained nor a broader study has conducted which makes the classification of workers as per their efficiency level is possible. Exact status on the skill based composition of migrant workers is therefore difficult to figure out. A situation was floated by Dr. Ganesh Bahadur Gurung regarding the skill-composition of migrant workers which was largely referred in the professional literature since then. According to Gurung, (2004), the volume of migrant workers at that time was composed of 69% unskilled, 27% Semi-skilled, 3% Skilled and 1% professionals. The comparative situation between 2004 and 2015 as depicted in Chart 3.3, suggest that unskilled workforce has gradually been replacing by semi-skilled and skilled in recent years. During the last decade, the proportion of unskilled workers has declined by more than 25% in among the total labour migrants from Nepal.



Chart .3.3: Transformation of Demand Composition



Source: Gurung, 2007, Advertisement Analysis, 2015

### 3.2.5 Share of skills in demand

Instead of some status type of information, respondents are also asked their opinions regarding the demand and supply of Nepalese Workforce. The first question in this type is asked about the composition of skilled workforce (including semi-skilled and professionals) in the total foreign demand giving four options as mentioned in the Table 4.4. Large majorities of respondents (48.6%) are of the opinion that the demand proportion is between 25% and 50%. Likewise, 21.6% thinks that this proportion lies between 10-25%. Similarly, 16.2% thinks that this proportion lies below 10%. The detail figure is in the table below.

Table 4.4: Composition of Demand

S N	Involvement Proportion of Skilled and Semi-skilled Workers	Frequency	Percent	Remarks
1	More than 50%	5	13.5	
2	Between 25% to 50%	18	48.6	
3	Between 10% -25%	8	21.6	
4	Less than 10%	6	16.2	
5	Total	37	100.0	

Source: Field Survey 2015

### 3.2.8 Highly demanded occupations

Respondents were also asked about the mostly demanded jobs in the foreign labour market. All the 40 manpower agencies. The weightage depicted in the fourth column is the percentage of agencies among the total agencies who have mentioned that that particular skill as a demanded occupation. The top five demanded jobs obtained from the analysis are Plumber, Electrician, Welder, Carpenter and Driver.

Table 4.6 Demanded Occupations

S N	Name of Occupation	Demanded Level	Demanded weightage
1	Plumber	14	35.0
2	Electrician	13	32.5
3	Mason	9	22.5
4	Welder	9	22.5
5	Carpenter	8	20.0
6	Driver	7	17.5
7	AC Technician	6	15.0
8	Aluminum Fabricator	5	12.5
9	Cook	5	12.5

S N	Name of Occupation	Demanded Level	Demanded weightage
10	Foreman	5	12.5
11	Fabrication	4	10.0
12	Rigger	4	10.0
13	Scaffolder	4	10.0
14	Steel Fixture	4	10.0
15	Waiter	4	10.0
16	Automobile Engineer	3	7.5
17	Operators	3	7.5
18	AC Mechanic	2	5.0
19	Architecture Engineer	2	5.0
20	Baker	2	5.0
21	Cashier	2	5.0
22	Computer Operator	2	5.0
23	Crew Member	2	5.0
24	Mechanic	2	5.0
25	Mechanical Engineer	2	5.0
26	Painter	2	5.0
27	Security Guard	2	5.0

Source: Field Survey 2015

### 3.2.6 Share of skills in supply

Respondents are also asked about the proportion of skilled workforce in the total migrant workers from Nepal. Majority of respondents (38.9%), thinks that the supply proportion of skilled workforce (including semi-skilled and professionals) lies between 10-25 percent, however slightly lower proportion of respondents (33.3% ) also opined that the proportion is between 25-40 percent. Unlike this opinion, some 13.9% respondents are in each extreme group who thinks the proportion is below 10% and 40-50%. The detail figure is presented in Table 4.5.

Table 4.5: Composition of Supply

SN	Supply Proportions	Frequency	Percent	Remarks
1	40-50	5	13.9	
2	25-40	12	33.3	
3	10-25	14	38.9	
4	<10	5	13.9	
5	Total	36	100.0	

Source: Field Survey 2015

### 3.2.7 Skill mismatch in general

One question in the set of questionnaire is about the relevancy of training programs conducted in Nepal regarding the jobs abroad. In this respect, majority of respondents (87%) agree that the training programs conducted in Nepal are relevant with the international job market to some extents. Very few respondents have expressed that training program is completely irrelevant.

Table 4.5 Perception Regarding Mismatch

SN	Response Type	Frequency	Percent	Remarks
1	Not at all	4	10.5	
2	Little bit	23	60.52	
3	Little more	10	26.3	
4	Completely related	1	2.6	
5	Total	38	19.5	

Source: Field Survey 2015



## 4. Focus Group Discussion

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A workshop among the returnee workers was organized as a focus group discussion. The purpose of this workshop was to identify the major skills mismatch between the abroad needs and domestic training delivery. This program was organized on 7<sup>th</sup> Ashad 2072 in the TITI halls with the participation of more of twenty returnee workers from several skilled occupations (list of participants in included in Annex).

The forum was used to classify the identified jobs in to various skilled categories identified by the advertisement analysis and to figure out the broader areas of mismatch of skills between abroad needs and domestic training delivery. (The detail matrix of skill mismatch is depicted in Annex II)

## 5 Conclusion and Recommendations

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### 5.1 Findings

Presently foreign employment and remittance is justified as a central pillar of Nepalese Economy, however Nepal is not reaping the desired benefit from it. The main gap is the lack of appropriate and sufficient skills in Nepalese Youths. Unlike the demand of national job market, international job market demands workers with more specialized and a technology intensive skill where working environment is also different because of consideration of environmental issues and extensive use of safety measures.

There is significant variation in the expected salary among the migrant workers. A semi-skilled worker can expect monthly salary higher by 40% than the expectation of unskilled worker, whereas the corresponding expectation of skilled and professional worker are higher by 58% and 182% respectively.

Although level of skill is the foremost component of income variation among migrant workers, this is not a single factor for such variation. Type of skill, economic and social status of destination country, and educational qualification of migrant workers are the other factors that are responsible for income variation.

There is not any significant relationship between expected salary and cost of migration, however the average cost of migration of unskilled workers is found significantly higher than that of skilled and professional workers.

Rapid change can be observed in the skill composition of Nepalese migrant workers in recent years. The proportion of unskilled workers is decreased by more than 20 percentage points between 2004 to 2014, whereas corresponding figures of skilled and professional workers increased by almost equal size.

Nepalese foreign employment professionals have received increasing demand of skilled workers in recent years. This is also creating pressure to increase the supply of workers accordingly, however the capacity of training institutes in Nepal are not in the position to satisfy the received demand.

The relationship between the level of skills and their expected salary in abroad is directly proportional to each other whereas opposite is the relationship with migration cost. The differences

between both offered salary and migration cost among the various competency levels are found statistically significant.

Although, large numbers of training providers are being involved in conducting training programs, some skills are still in strong demand. The soft-skills like interpersonal skills and politeness are the additional requirements for skilled workers for higher employability.

### 5.2 Conclusion

There is a perfect interconnection among skills training, income level of migrants and remittance to the country. Although remittance is the bad choice to sustain the economy among the presently available worst choices, this can also be considered as a silver lining in the black cloud. We can make people skilled if or if not stop them from migration, in both case, skills training will be profitable for the nation.

All migrations are not bad but the culture of migration is always bad. If a person migrates either internally or externally, to capitalize his potentials this may be a welcome effort. But those types of migration must be discouraged who migrates to gulf to work in agriculture leaving his own land barren. The later type of migration culture which is proliferating in recent years is becoming huge economic as well as social challenge of the Nation.

Skills training always augments the potentials, enhances productivity thus widens the economic horizons of not only individuals but nation in totality. But majority of graduates of presently available training programs neither gets the employment opportunities in the country nor satisfy the needs of abroad demand. Reason is simple, the aspect of training quality and needs of labour market are not getting due emphasis in every phase from designing to implementation.

### 5.3 Recommendations

Based on the above conclusion and findings, some points are recommended regarding these issues and as per the objectives of the study. These points are listed out as hereunder.

- Clear mismatch can be observed between demand and supply of skilled workforce especially in foreign employment sectors. Such type of mismatch not only observed in quantity but also in quality. Some soft skills like politeness, interpersonal skills and communicative skills are the basic requires that lack in Nepalese.
- Safer migration is the function of education and training which includes both hard skills and soft skills. Both skills should be provided in a single package. The orientation training provided by Foreign Employment Promotion Board should be linked up with the skills training provided under vocational training packages.
- The skilled workers not only expect to earn higher income from foreign employment but also expect to migrate in low cost and enjoy secured jobs, but unskilled workers are hardly found motivated to take training before flying to abroad. There is a need of strong advocacy of vocational training as well as strict legal provision to stop mischievous activities in this sector.
- Tight provision should be incorporated in Foreign Employment Act 2064 regarding "Skill-Certificate for Skill-Job" and implemented this accordingly.
- The foreign employment professionals are encouraged to publish the detail information regarding the level of skills among other factors and make them fully responsible for compliance of those information.

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## Annexes

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**Annex I (A) List of Identified Jobs together with demanded numbers**

SN	Demanded Jobs	Advertisement Number	Percent	Demanded Number	Percent
1	Labour	396	6.8	25085	15.1
2	security guard	396	6.8	23936	14.4
3	cleaner	259	4.4	15148	9.1
4	Factory worker	57	1.0	6028	3.6
5	Light Driver	129	2.2	4584	2.8
6	Waiter	169	2.9	4289	2.6
7	Mason	129	2.2	4203	2.5
8	Carpenter	136	2.3	4155	2.5
9	Helper	87	1.5	4081	2.5
10	Salesman	108	1.8	3850	2.3
11	Heavy Driver	149	2.5	3498	2.1
12	Electrician	145	2.5	3371	2.0
13	Production Operator	45	0.8	2596	1.6
14	Restaurant Worker	34	0.6	2217	1.3
15	Driver	119	2.0	1980	1.2
16	Steel Fixture	73	1.2	1960	1.2
17	Plumber	124	2.1	1876	1.1
18	Scaffolding	36	0.6	1717	1.0
19	Supervisor	144	2.5	1683	1.0
20	Merchandiser	13	0.2	1673	1.0
21	Skilled Helper	55	0.9	1618	1.0
22	Cook	120	2.0	1548	0.9
23	Kitchen steward	21	0.4	1416	0.9
24	Welder	101	1.7	1281	0.8
25	Waitress	88	1.5	1275	0.8
26	Architectural Labour	13	0.2	1256	0.8
27	Kitchen Helper	38	0.6	1242	0.7
28	Housekeeping Staffs	63	1.1	1083	0.7
29	Taxi Driver	9	0.2	1000	0.6
30	Pipe fitter	56	1.0	968	0.6
31	Painter	69	1.2	814	0.5
32	assistant cook	52	0.9	792	0.5
33	Mechanics	50	0.9	789	0.5
34	Bakery Pastry Man	95	1.6	774	0.5
35	Sewing Operator	5	0.1	650	0.4
36	Cashier	47	0.8	641	0.4
37	Operator	13	0.2	634	0.4
38	Porter	10	0.2	626	0.4
39	Loading/Unloading Worker	13	0.2	625	0.4
40	Store Keeper	60	1.0	623	0.4
41	Room Boy	38	0.6	591	0.4
42	Domestic Worker	32	0.5	589	0.4
43	Chapatti and Paratha Maker	41	0.7	571	0.3

## Global Demand Assessment for Nepalese Skilled Workforce

SN	Demanded Jobs	Advertisement Number	Percent	Demanded Number	Percent
44	Technician	45	0.8	561	0.3
45	Rigger I	29	0.5	556	0.3
46	Forklift Driver	23	0.4	538	0.3
47	Office boy	31	0.5	502	0.3
48	Excavator Operator	25	0.4	498	0.3
49	Agriculture Worker	17	0.3	482	0.3
50	Construction labour	8	0.1	478	0.3
51	Shuttering Carpenter	18	0.3	458	0.3
52	Steward	36	0.6	451	0.3
53	Commis I	41	0.7	441	0.3
54	Plantation Workers	5	0.1	436	0.3
55	Foreman	46	0.8	429	0.3
56	Laundry Man	46	0.8	428	0.3
57	Brick Mason	17	0.3	414	0.2
58	Chamber Man	8	0.1	403	0.2
59	Foreman/Supervisor Rigger	13	0.2	397	0.2
60	Structure fixture	22	0.4	385	0.2
61	Light Driver	7	0.1	373	0.2
62	Sales Lady	26	0.4	364	0.2
63	Fabricator	22	0.4	360	0.2
64	Scaffolder Helper	12	0.2	347	0.2
65	GCC Driver	12	0.2	343	0.2
66	AC Technician	36	0.6	335	0.2
67	Sales Helper	5	0.1	335	0.2
68	Fitter Helper	13	0.2	325	0.2
69	Butcher	42	0.7	309	0.2
70	Continental Cook	24	0.4	301	0.2
71	Receptionist	33	0.6	295	0.2
72	Mechanic	35	0.6	293	0.2
73	Valet Driver	7	0.1	290	0.2
74	stocker	4	0.1	289	0.2
75	Aircraft Cleaner	6	0.1	275	0.2
76	Tile fixture	22	0.4	274	0.2
77	Ductman	16	0.3	258	0.2
78	Professional	5	0.1	252	0.2
79	Assist. Merchandiser	1	0.0	250	0.2
80	Picker	3	0.1	250	0.2
81	General Worker	3	0.1	245	0.1
82	Food Provider	9	0.2	245	0.1
83	Waiters	6	0.1	243	0.1
84	Tea Boy	6	0.1	242	0.1
85	Electrical Engineer	23	0.4	241	0.1
86	Dump Truck Driver	2	0.0	210	0.1
87	Maintenance Technician	2	0.0	207	0.1
88	Blacksmith	12	0.2	203	0.1

## Global Demand Assessment for Nepalese Skilled Workforce

SN	Demanded Jobs	Advertisement Number	Percent	Demanded Number	Percent
89	Reinforce Fitter	11	0.2	201	0.1
90	Car driver	19	0.3	198	0.1
91	Wheel Load Operator	11	0.2	196	0.1
92	Machine Operator	8	0.1	193	0.1
93	Clerk	17	0.3	182	0.1
94	Cook (Indian)	26	0.4	181	0.1
95	Washer	11	0.2	169	0.1
96	Chef the party	19	0.3	168	0.1
97	Insulator	10	0.2	165	0.1
98	Delivery Man	6	0.1	163	0.1
99	Truck Driver	14	0.2	160	0.1
100	Catering Supervisor	14	0.2	152	0.1
101	Aluminum Fabricator	9	0.2	151	0.1
102	Instrument fitter	18	0.3	149	0.1
103	Industrial electrician	11	0.2	146	0.1
104	House Maid	6	0.1	146	0.1
105	Trailer Driver	8	0.1	137	0.1
106	Dish Washer	10	0.2	135	0.1
107	Manager	30	0.5	135	0.1
108	Receiver	5	0.1	134	0.1
109	Sa Attendant	2	0.0	128	0.1
110	Welder Helper	7	0.1	125	0.1
111	Tailor	8	0.1	125	0.1
112	Commis II	17	0.3	123	0.1
113	Warehouse helper	6	0.1	122	0.1
114	Dozer Operator	8	0.1	122	0.1
115	Gypsum Technician	9	0.2	121	0.1
116	Foreman Mechanical	15	0.3	113	0.1
117	Grader Operator	13	0.2	112	0.1
118	A/C Mechanic	17	0.3	111	0.1
119	Commis III	15	0.3	110	0.1
120	General Electrician	10	0.2	105	0.1
121	Building Technician	4	0.1	104	0.1
122	Skilled Assistant	7	0.1	102	0.1
123	Farmer	1	0.0	100	0.1
124	Service Crew Male	1	0.0	100	0.1
125	Traffic Sign Controller	1	0.0	100	0.1
126	Civil engineer	7	0.1	100	0.1
127	Auto Electrician	18	0.3	97	0.1
128	Telephone Operator	17	0.3	96	0.1
129	Care Taker	3	0.1	96	0.1
130	Bartender	14	0.2	92	0.1
131	Care taker	3	0.1	92	0.1
132	Plaster	5	0.1	91	0.1
133	Demi chef	17	0.3	88	0.1

## Global Demand Assessment for Nepalese Skilled Workforce

SN	Demanded Jobs	Advertisement Number	Percent	Demanded Number	Percent
134	General Cook	16	0.3	88	0.1
135	Structural Fitter	4	0.1	85	0.1
136	Electrician General	4	0.1	82	0.0
137	General Machine Operator	3	0.1	79	0.0
138	Finishing Carpenter	6	0.1	77	0.0
139	Charge Hand Civil	4	0.1	76	0.0
140	Electrician Helper	12	0.2	75	0.0
141	Heavy Driver	3	0.1	75	0.0
142	HVAC Technician	16	0.3	74	0.0
143	Administrative	13	0.2	73	0.0
144	Life Guard	14	0.2	72	0.0
145	Mobile Crane Operator	7	0.1	72	0.0
146	Data Entry	6	0.1	71	0.0
147	Polisher	7	0.1	70	0.0
148	Equipment operator	5	0.1	69	0.0
149	Spray Painter	10	0.2	67	0.0
150	Security Officer	6	0.1	67	0.0
151	Maintenance Helper	6	0.1	67	0.0
152	Land surveyor	10	0.2	66	0.0
153	Safety Officer	7	0.1	65	0.0
154	Sales Man	3	0.1	65	0.0
155	Crane Operator	11	0.2	63	0.0
156	Engineer	15	0.3	63	0.0
157	C/H Structural	4	0.1	62	0.0
158	Heavy Duty Mechanics	7	0.1	60	0.0
159	Beautician	5	0.1	60	0.0
160	Auto Mechanics	10	0.2	60	0.0
161	Bell boy	11	0.2	57	0.0
162	Mechanical engineers	10	0.2	56	0.0
163	Officer	6	0.1	56	0.0
164	Trolley Boy	2	0.0	55	0.0
165	Pool Attendants	7	0.1	54	0.0
166	Duct Insulator	4	0.1	53	0.0
167	Bus Boy	2	0.0	52	0.0
168	Roller Operator	3	0.1	51	0.0
169	Bar Man	1	0.0	50	0.0
170	Retail Merchandiser	1	0.0	50	0.0
171	S/Fixer	1	0.0	50	0.0
172	Ward Attender	2	0.0	50	0.0
173	Assistant Administrator	3	0.1	50	0.0
174	Light Duty Driver (Female)	1	0.0	50	0.0
175	Senior Civil Engineer	1	0.0	50	0.0
176	Mixer Driver	1	0.0	50	0.0
177	Juice Maker	6	0.1	50	0.0
178	Head chef	13	0.2	48	0.0



## Global Demand Assessment for Nepalese Skilled Workforce

SN	Demanded Jobs	Advertisement Number	Percent	Demanded Number	Percent
179	HSE officer	6	0.1	47	0.0
180	Cycle counter	3	0.1	45	0.0
181	Steel fabricator	5	0.1	45	0.0
182	Health Club attendant	4	0.1	45	0.0
183	Checker Delivery	3	0.1	45	0.0
184	Steel Fabricator	5	0.1	44	0.0
185	Accountant	11	0.2	43	0.0
186	Chef	9	0.2	43	0.0
187	Salad Maker	15	0.3	41	0.0
188	Sauce chef	10	0.2	40	0.0
189	Sand Blaster	6	0.1	40	0.0
190	Hydraulic Mechanic	4	0.1	40	0.0
191	Pressman	1	0.0	40	0.0
192	Foreman Civil	6	0.1	39	0.0
193	Heavy Equipment Mechanics	4	0.1	37	0.0
194	Bulldozer Operator	7	0.1	37	0.0
195	Gardener	8	0.1	35	0.0
196	Sorter	2	0.0	35	0.0
197	Brick Mason	1	0.0	35	0.0
198	Secretary	8	0.1	33	0.0
199	Spa Therapist	6	0.1	32	0.0
200	Mechanic	2	0.0	32	0.0
201	Supervisor (Civil)	3	0.1	31	0.0
202	Staff Nurse	3	0.1	31	0.0
203	Messenger	2	0.0	30	0.0
204	Operator	1	0.0	30	0.0
205	Heavy Equipment Operator	1	0.0	30	0.0
206	Safety Assistant	3	0.1	30	0.0
207	Lady Taxi Driver	1	0.0	30	0.0
208	Hostess	9	0.2	29	0.0
209	Assistant Store Keeper	4	0.1	29	0.0
210	Plaster Worker	3	0.1	28	0.0
211	Lab Technician	5	0.1	26	0.0
212	Chef de Party	5	0.1	26	0.0
213	Block Mason	1	0.0	25	0.0
214	Loading & Unloading Worker	1	0.0	25	0.0
215	S. Carpenter	1	0.0	25	0.0
216	Mobile Technician	5	0.1	24	0.0
217	Indian Cook	3	0.1	23	0.0
218	Time Keeper	8	0.1	23	0.0
219	Purchase Clerk	6	0.1	23	0.0
220	C/H Industrial Electrician	4	0.1	22	0.0
221	Pest Control Technician	5	0.1	21	0.0
222	Auto Deter	10	0.2	21	0.0
223	Auto Painter	5	0.1	21	0.0

## Global Demand Assessment for Nepalese Skilled Workforce

SN	Demanded Jobs	Advertisement Number	Percent	Demanded Number	Percent
224	Cabling Technician	4	0.1	21	0.0
225	Mill Wrighter	4	0.1	20	0.0
226	Counter hands	2	0.0	20	0.0
227	Iron Worker	2	0.0	20	0.0
228	IT Support	2	0.0	20	0.0
229	Loader Operator	2	0.0	20	0.0
230	Cooker	1	0.0	20	0.0
231	Paver	1	0.0	20	0.0
232	Electric Arc Welder	2	0.0	20	0.0
233	Technician General	1	0.0	20	0.0
234	Client Representative Female	2	0.0	20	0.0
235	Spinner	2	0.0	20	0.0
236	Fuel Filling Attendant	1	0.0	18	0.0
237	Motor Bike Driver	4	0.1	17	0.0
238	Trainee/Inter Worker(Construction	2	0.0	17	0.0
239	Industrial Technician	2	0.0	16	0.0
240	Public Area attendant	2	0.0	16	0.0
241	Barista (coffee maker)	4	0.1	16	0.0
242	Foreman Piping	2	0.0	16	0.0
243	Shovel Operator	2	0.0	15	0.0
244	Sales Executive	1	0.0	15	0.0
245	Librarian	2	0.0	15	0.0
246	Printer(Speed Master)	1	0.0	15	0.0
247	Company Driver(Heavy)	2	0.0	15	0.0
248	Wiring Electrician Assistant	3	0.1	15	0.0
249	Trailer Service Mechanic	3	0.1	15	0.0
250	Duct Fabricator	1	0.0	15	0.0
251	Chat Maker	2	0.0	14	0.0
252	Foreman Electrical	4	0.1	14	0.0
253	Tyre Man	5	0.1	13	0.0
254	Auto Technician	2	0.0	13	0.0
255	Club Executive Language Receptionist Female	2	0.0	13	0.0
256	Maintenance Helper	2	0.0	12	0.0
257	Loader Operator	2	0.0	12	0.0
258	Chef De Party	1	0.0	12	0.0
259	Sweet Maker	2	0.0	11	0.0
260	Assistant Catering Camp Boss	3	0.1	11	0.0
261	Project Managers	4	0.1	10	0.0
262	Charge hand Electrical	1	0.0	10	0.0
263	Reach Truck Operator	1	0.0	10	0.0
264	Assistant Building Technician	2	0.0	10	0.0
265	Kitchen Technician	3	0.1	10	0.0
266	Maintenance Technician	2	0.0	10	0.0
267	Light Vehicle Driver	1	0.0	10	0.0

## Global Demand Assessment for Nepalese Skilled Workforce

SN	Demanded Jobs	Advertisement Number	Percent	Demanded Number	Percent
268	Quality Controller	2	0.0	10	0.0
269	CCTV Technician Programmer	1	0.0	10	0.0
270	Master Tailor	1	0.0	10	0.0
271	Asst. Teacher	1	0.0	10	0.0
272	Hostess/Host F	2	0.0	10	0.0
273	Dry-cleaner	1	0.0	10	0.0
274	Ride Operator	1	0.0	10	0.0
275	Ride Technician	1	0.0	10	0.0
276	Mechanical fitter	2	0.0	9	0.0
277	Marketing Specialist	3	0.1	9	0.0
278	JCB Operator	2	0.0	9	0.0
279	Electric Technician	1	0.0	9	0.0
280	Unit Manager	4	0.1	8	0.0
281	Rental Agent (Vehicle)	2	0.0	8	0.0
282	Server	1	0.0	8	0.0
283	Boom Truck Driver	2	0.0	8	0.0
284	Long Chassis Pick-Up Driver	2	0.0	8	0.0
285	Mechanics	2	0.0	7	0.0
286	Auto A/C Technician	3	0.1	7	0.0
287	Maintenance Technician (A/C Duct Related)	1	0.0	7	0.0
288	Painting Lead man( Civil)	1	0.0	7	0.0
289	Chef Steward	2	0.0	6	0.0
290	Auto Electrician	1	0.0	6	0.0
291	Generator Operator	2	0.0	6	0.0
292	Laundry Man/Iron Man	1	0.0	6	0.0
293	Water Treatment Technician	2	0.0	6	0.0
294	Embroider	2	0.0	6	0.0
295	Charge Hand Mechanical	1	0.0	5	0.0
296	Computer Operator	1	0.0	5	0.0
297	Kitchen Helper	1	0.0	5	0.0
298	Graphic Designer	1	0.0	5	0.0
299	Office Assistant	1	0.0	5	0.0
300	Service Advisor	1	0.0	5	0.0
301	Club Executive Language Receptionist Male	1	0.0	5	0.0
302	Falafel Maker	1	0.0	5	0.0
303	Restaurant Supervisor	1	0.0	5	0.0
304	Part Fun Female	1	0.0	5	0.0
305	Chart Maker	1	0.0	5	0.0
306	Bookkeeper	1	0.0	5	0.0
307	Restaurant Manager Female	1	0.0	5	0.0
308	Hotel Marketing Team Member Female	1	0.0	5	0.0
309	Sale Supervisor	1	0.0	5	0.0
310	Maintenance Assistant Mechanic	1	0.0	5	0.0

## Global Demand Assessment for Nepalese Skilled Workforce

SN	Demanded Jobs	Advertisement Number	Percent	Demanded Number	Percent
311	Dumper Operator	1	0.0	5	0.0
312	Civil Engineer	1	0.0	4	0.0
313	Maintenance Supervisor	2	0.0	4	0.0
314	Recreation attendant	1	0.0	4	0.0
315	Representative	2	0.0	4	0.0
316	Single Drum Roller 10 Ton Operator	2	0.0	4	0.0
317	Senior Electricians	2	0.0	4	0.0
318	Assistant Operator	2	0.0	4	0.0
319	Bussers	1	0.0	3	0.0
320	Store assistant	1	0.0	3	0.0
321	Site coordinator	1	0.0	3	0.0
322	Material Controller	3	0.1	3	0.0
323	Redemption Staff Female	1	0.0	3	0.0
324	Linen Runner/Chamber man	1	0.0	3	0.0
325	CDP Continental	1	0.0	3	0.0
326	Pump helper	1	0.0	3	0.0
327	Site engineering	1	0.0	2	0.0
328	Chef Continental	2	0.0	2	0.0
329	Assistant cook	1	0.0	2	0.0
330	Help Desk	1	0.0	2	0.0
331	Doctor (MBBS)	2	0.0	2	0.0
332	Safety Engineer	2	0.0	2	0.0
333	Store Supervisor	2	0.0	2	0.0
334	Delivery Coordinator	2	0.0	2	0.0
335	QC/QA Engineer	2	0.0	2	0.0
336	Assistant Baker	1	0.0	2	0.0
337	Vehicle Machine	1	0.0	2	0.0
338	Light Vehicle Mechanic	2	0.0	2	0.0
339	HR Officer	1	0.0	2	0.0
340	Personal Assistant of CEO	1	0.0	2	0.0
341	CDP Indian	1	0.0	2	0.0
342	Eraction Foreman	1	0.0	2	0.0
343	Rice Cook	1	0.0	1	0.0
344	Assistant Manager-Parts	1	0.0	1	0.0
345	Central Concrete Mixer Operator	1	0.0	1	0.0
346	Hostess/Host M	1	0.0	1	0.0
347	Vegetable Cutter	1	0.0	1	0.0
348	Total	5862	100	166460	100

**Annex I B. Analysis of Supply Side: Migrants' Number**

SN	Name of Position	Number of Agencies	Demanded Number
1	Helper	24	6730
2	Factory Worker	8	4080
3	Security Guard	14	1771
4	Mason	28	1049
5	General Worker	5	855
6	Scaffolder	6	780
7	Carpenter	15	756
8	Electrician	14	687
9	Farm Worker	3	680
10	Salesperson	4	623
11	Driver	16	605
12	Cook	8	530
13	Steel Fixture	9	465
14	Welder	3	362
15	Machine Operator	1	300
16	Plumber	9	262
17	Cleaner	5	238
18	Restaurant Worker	1	200
19	Foreman	2	130
20	House keeping	1	120
21	Nurse	1	100
22	Hotel Chef	1	100
23	Sluttering Carpenter	2	100
24	Construction Supervisor	3	37
25	Accountant	1	30
26	Engineer	1	30
27	Waiter	1	20
28	Officer Boy	2	17
29	AC Technician	1	10
30	Hotel Management	1	10
31	Front Office	1	7
32	Safety Officer	1	5
33	Total	192	21689

## Annex II: Situational and Skill Gap analysis in Particular Occupations

Occupations	Situational and Skill Gap Regarding			
	Workplace Environment	Applied Technology	Used Materials	Other Soft-skills
Civil Supervisor	<ul style="list-style-type: none"> <li>• Availability of wider space</li> <li>• No negligence on using safety equipment</li> <li>• Strict on quality issues no compromise</li> <li>• Proper attention is paid on waste management of harmful wastes for industries or working sites</li> </ul>	<ul style="list-style-type: none"> <li>• Advanced equipment are used</li> <li>• Physical and manual efforts are replaced machines</li> <li>• Modern technology "Boom" is used for concrete works</li> </ul>	<ul style="list-style-type: none"> <li>• Ready mix is widely used instead of manual mixing of construction materials</li> <li>• The proportion for mixing concrete is different</li> <li>• Original and durable tools are used</li> </ul>	<ul style="list-style-type: none"> <li>• Language of particular country is beneficial</li> <li>• Lower profile workers are not undermined but treated equally</li> </ul>
Food and Beverage	<ul style="list-style-type: none"> <li>• Properly designed and well managed working place</li> <li>• Workers are made responsible on duties</li> <li>• All necessary equipment are already installed in workplace</li> <li>• Proper management of tools and equipment</li> <li>• Division of work duties and cooperation in each other</li> </ul>	<ul style="list-style-type: none"> <li>• Guiding principles should be followed</li> <li>• Refreshment and orientation training to each staffs for each occupation</li> <li>• Specific equipment for each jobs</li> <li>• Manual works are too much limited</li> </ul>	<ul style="list-style-type: none"> <li>• Ready mix is widely used instead of manual mixing of construction materials</li> <li>• Proportion is different</li> <li>• Original and durable tools are used</li> <li>• Too much chemicals are used</li> <li>• Too much specified works</li> <li>• Wider knowledge about the specification and material</li> </ul>	<ul style="list-style-type: none"> <li>• Innocent and honorary behavior</li> <li>• Multi language skill</li> <li>• Too much sensitive on politeness</li> <li>• Discipline is must</li> <li>• Occupational ethics and morals</li> </ul>
Architectural Design	<ul style="list-style-type: none"> <li>• Designed based on soil structure, and temperature</li> <li>• Structure based on temperature</li> <li>• Defined working procedure</li> </ul>	<ul style="list-style-type: none"> <li>• New and advanced software</li> <li>• Autocad 2015</li> <li>• Skeakup 3D 2015</li> <li>• Landscaping and interior density</li> </ul>	<ul style="list-style-type: none"> <li>• Modern Structural</li> <li>• Modern equipment</li> <li>• Difference in academic curricula</li> <li>• Relevant techniques and knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• Not understanding the order or requirement properly</li> <li>• Some type of discrimination</li> <li>•</li> </ul>

## Global Demand Assessment for Nepalese Skilled Workforce

Occupations	Situational and Skill Gap Regarding			
	Workplace Environment	Applied Technology	Used Materials	Other Soft-skills
Construction Trades (Carpenter, Mason)	<ul style="list-style-type: none"> <li>• Availability of Wider Space</li> <li>• No negligence for using safety equipment</li> <li>• Proper attention is paid to manage the harmful wastes for industries or working sites</li> <li>• Different regulation for different countries</li> </ul>	<ul style="list-style-type: none"> <li>• A lots of equipment are available</li> <li>• Equipment are modern</li> <li>• Modern and new technologies</li> <li>• Fast and quality work due to the use of modern technology</li> </ul>	<ul style="list-style-type: none"> <li>• Proper knowledge on handling of equipment</li> <li>• Efficient and skilled worker are always appreciated and rewarded</li> </ul>	<ul style="list-style-type: none"> <li>• Language of destination country is must</li> </ul>
Civil Foreman	<ul style="list-style-type: none"> <li>• Geographical environment makes changes the working environment</li> <li>• Proper working ethics should be followed</li> <li>• Proper attention is paid on safety rules</li> </ul>	<ul style="list-style-type: none"> <li>• Lots of modern equipment are available</li> <li>• Chance of mishandlings due to lack of knowledge,</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Fast and quality work due to the use of modern technology</li> <li>• Proper attention should be paid on safety rules</li> </ul>	<ul style="list-style-type: none"> <li>• Hospitality is very crucial for workers</li> <li>• Politeness, innocence and devotion is required</li> <li>•</li> </ul>
Front Office ( Hotel)	<ul style="list-style-type: none"> <li>• Advance technologies</li> <li>• Communicative environment</li> <li>• Team work &amp; good interrelationship among workers</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge about advance technologies</li> <li>• Use of technologies makes work easier and faster</li> <li>• Latest software were used and online working system</li> <li>• Recording system is up to date</li> </ul>	<ul style="list-style-type: none"> <li>• Productivity due to extensive use of new technologies</li> <li>• Saves time</li> <li>• User friendly technologies</li> </ul>	<ul style="list-style-type: none"> <li>• Interpersonal skills and communicative skills</li> <li>• Oriented for working in team</li> <li>• Misunderstanding might leads to less productivity</li> </ul>



## Annex III List of Participants of Interaction Program

Workshop on Skill-Gap Analysis between Abroad Need and Domestic Training Delivery						
Date: 2072/3/7						
Venue:- TITI, Sonothimi, Bhaktapur						
Time: 8:30 am to 12:00 noon						
Organizer: CTEVT, Research and Information Division						
S. N	Name of Employee	Related Occupation	Working Experience in Years		Destination Country	Name of Employer Company
			Total Experiences	Abroad Experience		
List of Participants						
1	Anish Amatya	Foreman	10 Yrs.	2 Yrs.	Dubai	Obayashi
2	Bixal Lamichhane	Civil foreman	17 yrs.	4 yrs.	Dubai, Qatar	Obayashi / Talsal
3	Prakash Pokharel	Civil foreman	13 yrs.	3 yrs.	Dubai	Obayashi
4	Mukun Bdr. Tam	Drafting team	11 yrs	1 yrs	Qatar	Tejco or I.P.E
5	Raj Kumar Baniya	Foreman	15 years.	2 "	Dubai	Obayashi
6	Saurav Lamichhane	General foreman	7 yrs	4 yrs	Dubai + Qatar	Obayashi + China harbor
7	Saras Lamichhane	SSV KFC	8 yrs	6 yrs	Dubai	American camp dubai
8	Pran Karki	Team member	1 Yrs	2 Yrs	Dubai	" " "
9	Sudhan Pokharel	Hotelier	5 years	3 years	UAE, Dubai	JA resorts and Hotels

10	Rabin Tandukar	F&B (captain)	8 Yrs	6 Yrs	Oman	Shangri-la - Muscat
11	Pradip Lamichhane	Civil foreman	11 years	4 years	UAE, Qatar	JT metro, Post Project
12	Krishna. B. B.K	Carpenter	7. year	7. year	Qatar	A new prof. project.
13	Angshuman Path	CH - Nepal	18 Yrs.	18 Yr.	Nepal.	Shape Khali.
14	Manoj Lamichhane	Foreman	58 years.	5 year	(per Qatar) dubai	DUBAI BATAA.
15	Saroj Gisi	Foreman	5 years	4 1/2 year	dubai	Dubai metro project
16	Jug Gunning	CIVIL ENGINEER	14 years	14 year	QATAR	Gas plant
17	<del>Mageda Karki</del>	<del>Computer</del>				
18	Anil Chalise	Administer	4 Years	4 Years	UAE Qatar	Obayashi & L&T
19						
20						

## Annex IV Questionnaires

प्राविधिक शिक्षा तथा व्यावसायिक तालीम परिषद्  
अन्तराष्ट्रिय श्रमबजारको माग एवं उपलब्ध श्रमशक्ति बिच सिपको अन्तर विश्लेषण  
वैदेशिक रोजगार व्यावसाय संचालकहरुका लागि  
**प्रश्नावली**

१. उत्तरदाताको नाम : .....
२. कम्पनीको नाम र ठेगाना : .....
३. स्थापना वर्ष : .....

-----प्रश्नावली-----

१ यहाँको रोजगार कम्पनी बाट यस बर्षको हालसम्म वैदेशिक रोजगारमा पठाइएका कामदारहरुको तपसिलको तालिका बमोजिमको विवरण भरि सहयोग गरिदिनु होला ?

सि.नं	पेसाको नाम	दक्षताको तह ♥	रोजगारीको क्षेत्र #	गन्तव्य मुलुक	कुल संख्या	तालीमको अनिवार्यता	अनुभवको अनिवार्यता
१						थियो /थिएन्	थियो /थिएन्
२						थियो /थिएन्	थियो /थिएन्
३						थियो /थिएन्	थियो /थिएन्
४						थियो /थिएन्	थियो /थिएन्
५						थियो /थिएन्	थियो /थिएन्

#१ कृषि २. निर्माण एवं इन्जीनियरिङ्ग ३. स्वास्थ्य ४. कम्प्युटर र सूचना प्रविधि ५. पर्यटन ६. घरायसी एवं अनौपचारिक ७. अन्य

♥ १ अदक्ष २. अर्धदक्ष ३. दक्ष ४. उच्च दक्ष

२. यहाँको अनुभवमा माग उच्च रहेको तर नेपालमा उक्त सीपयुक्त जनशक्तिको अभाव भएका कम्तीमा पाँचबाट ब्यावसाय/पदको नाम प्राथमिकता क्रममा उल्लेख गरिदिनु होला । (सीपमुलक व्यावसाय मात्र)

१. .... २. ....
३. .... ४. ....
५. .... ६. ....

३. यहाँको अनुभवमा माग न्यून भएका तथा नेपालमा उक्त सीपको जनशक्ति पर्याप्त मात्रामा रहेका पाँचबाट व्यावसाय /पदको नाम प्राथमिकता क्रममा उल्लेख गरिदिनु होला । (सीपमुलक व्यावसाय मात्र)

१. .... २. ....  
३. .... ४. ....

४. नेपालमा लिएको तालीम अन्तराष्ट्रिय श्रमबजारमा सम्पादन गर्नुपर्ने कार्यसंग सामन्जस्यता भए नभएको बारेमा यहाँको कस्तो जानकारी रहेको छ ?

- क. सामन्जस्यता छैन । ख. केही मात्रामा भएपनि सामन्जस्यता रहेको छ ।  
घ. पूर्ण रूपमा सामन्जस्यता पाइन्छ ।

यदि सामन्जस्यता भए वा नभएको भए ?

सामन्जस्यता भए वा नभएका पेशाको नाम	सामन्जस्यता नभएको भए असामन्जस्यताका (Gap) मुख्य बुँदाहरु
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५. बैदेशिक रोजगारीको लागि सीपयुक्त जनशक्तिको मागको अवस्थाबारे तलको कुन भनाई बढि सान्दर्भिक पाउनुहुन्छ ?

- क. ५० प्रतिशत भन्दा बढि दक्ष र अर्धदक्ष जनशक्तिको माग भएको पाइन्छ ।  
ख. २५ देखि ५० प्रतिशत सम्म दक्ष र अर्धदक्ष जनशक्तिको माग भएको पाइन्छ ।  
ग. १० देखि २५ प्रतिशत सम्म दक्ष र अर्धदक्ष जनशक्तिको माग भएको पाइन्छ ।  
घ. १० प्रतिशत भन्दा कम मात्र दक्ष र अर्धदक्ष जनशक्तिको माग भएको पाइन्छ ।

६. बैदेशिक रोजगारीमा संलग्न कामदारमध्ये सिपयुक्त कामदारको संख्याको विषयमा तलको कुन भनाई यहाँको विचारमा बढि तथ्यमा आधारित छ ?

- क. दक्ष तथा अर्धदक्ष कामदारको संख्या ४० देखि ५० प्रतिशतको विचमा रहेको छ ।  
ख. दक्ष तथा अर्धदक्ष कामदारको संख्या २५ देखि ४० प्रतिशतको विचमा रहेको छ ।  
ग. दक्ष तथा अर्धदक्ष कामदारको संख्या १० देखि २५ प्रतिशतको विचमा रहेको छ ।  
घ. दक्ष तथा अर्धदक्ष कामदारको संख्या १० प्रतिशत भन्दा कम रहेको छ ।

७. यँहाको विचारमा वर्तमान अवस्थामा वैदेशिक रोजगारीको क्षेत्रमा सीप र तालीम संग सम्वन्धीत

मुख्य समस्याहरु र तिनका समाधानका उपायहरु के के होलान ?

समस्याहरु	समाधानका उपायहरु
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७. अन्त्यमा यस अध्ययन संग सम्वन्धित विषयमा केही सुझाव दिन चाहानुहुन्छ कि ?

यहाँहरुको समय तथा जानकारीका लागि परिषद्का तर्फबाट हार्दिक धन्यवाद ।

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## Annex V Photographs of Interaction Program



Deputy Director of R& I Presenting at the Workshop



Participants are Carrying Out Group Work