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GLOBAL MOBILITY OF INDIAN WORKFORCE

A Comprehensive Report on Trends and Status in European Union, Australia, the UK and the GCC

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ABBREVIATION

S No.	Abbreviation	Full Form
1	AI	Artificial Intelligence
2	AMEP	Adult Migrant English Program
3	AML	Anti-Money Laundering
4	ASQA	Australian Skills Quality Authority
5	BA	Bundesagentur für Arbeit (Federal Employment Agency of Germany)
6	BIM	Building Information Modeling
7	BIPPA	Bilateral Investment Promotion and Protection Agreement
8	CECA	Comprehensive Economic Cooperation Agreement
9	CEDA	Committee for Economic Development of Australia
10	CEPA	Comprehensive Economic Partnership Agreement
11	DHA	Dubai Health Authority
12	EFTA	European Free Trade Association
13	EMN	European Migration Network
14	EMR	Electronics Medical Records
15	ESDE	Employment and Social Development in Europe
16	ESG	Environmental, Social and Governance
17	EU	European Union
18	FICCI	Federation of Indian Chambers of Commerce & Industry
19	FTA	Free Trade Agreement
20	G2G	Government to Government
21	GCC	Gulf Cooperation Council
22	GDP	Gross Domestic Product
23	GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
24	GSM	General Skilled Migration
25	GTV	Global Talent Visa
26	HAAD	Abu Dhabi Health Authority
27	HSE	Health, Safety and Environment
28	ILO	International Labour Organization
29	IOM	International Organization for Migration
30	IT	Information Technology
31	KNOMAD	Global Knowledge Partnership on Migration and Development
32	KSA	Kingdom of Saudi Arabia
33	LMP	Labour Mobility Partnership
34	MATES	Mobility Arrangement for Trained Early-professionals Scheme
35	MEA	Ministry of External Affairs
36	MMPA	Migration and Mobility Partnership Arrangement
37	MoLE	Ministry of Labour and Employment
38	MoU	Memorandum of Understanding
39	MSDE	Ministry of Skill Development and Entrepreneurship
40	NSDC	National Skill Development Corporation
41	OECD	Organisation for Economic Co-operation and Development

S No.	Abbreviation	Full Form
42	PBBY	Pravasi Bhartiya Bima Yojana
43	PKVY	Pravasi Kaushal Vikas Yojana
44	PMKVY	Pradhan Mantri Kaushal Vikas Yojana
45	SHEV	Safe Haven Enterprise Visa
46	SOC	Standard Occupational Classification
47	SOL	Skilled Occupation List
48	TEPA	Trade and Economic Partnership Agreement
49	TGV	Temporary Graduate Visa
50	TITP	Technical Intern Training Program
51	TPV	Temporary Protection Visa
52	TSS	Temporary Skill Shortage
53	UAE	United Arab Emirates
54	UKIERI	UK-India Education and Research Initiative
55	USA	United States of America
56	VET	Vocational Education and Training
57	WB	World Bank

FOREWORD by FICCI

In an increasingly interconnected world, the mobility of the workforce has emerged as one of the most defining factors shaping global economies. As businesses expand across borders and talent pools grow more diverse, the ability of workers to move freely and contribute to economies outside their home countries has become crucial. This trend is especially significant for India, where a burgeoning workforce, characterized by its skill and adaptability, plays an important role in the global labor market.

India's labour migration is characterized by two distinct trends: low-skilled workers migrating primarily to the GCC and Southeast Asia and high-skilled professionals moving to the US, Europe, and Australia. As per the Ministry of External Affairs (MEA), around 3,54,21,987 Indians are living and working abroad, with the highest concentration in the USA (15%), the UAE (10%), Malaysia (8.2%), Canada (8.1%) and Saudi Arabia (6.9%).

India, with its dynamic and young workforce, has witnessed significant migration patterns over the last few decades. Indian professionals and skilled workers are increasingly sought after in countries with strong economic growth and labor shortages. As a result, there is a need for strategic frameworks that enable seamless mobility, ensuring that workers are equipped with the right skills, knowledge, and support systems to succeed abroad.

The FICCI - KPMG report on Global Mobility of Indian Workforce: A Comprehensive report on trends and status in European Union, Australia, the UK and the GSS delves into the current state of Indian workers in these regions, examining trends, challenges, and opportunities that influence their mobility.

This report aims to provide valuable insights into the trends shaping the global mobility of the Indian workforce and how Indian workers are navigating the opportunities and challenges in foreign labor markets. By analyzing data from key destination regions and examining policy frameworks, regulatory landscapes, and labor market dynamics, the report seeks to provide a clearer understanding of the current state and prospects of Indian workers globally.

As India continues to strengthen its position in the global economy, it is essential for stakeholders—governments, businesses, educational institutions, and policy-makers—to collaborate to harness the full potential of Indian talent abroad. The report has highlighted Bilateral & Multilateral Agreements, Skill Recognition Agreements, Targeted Training for Global Standards as some of the key areas of focus for the stakeholders to consider.

This report, we hope, will serve as a useful resource for informed policy decisions, guide businesses in strategic workforce planning, and offer practical insights for workers seeking opportunities outside India. I extend my gratitude to all contributors of this report and to those who continue to work towards enhancing the global mobility of the Indian workforce.

Dr Anish Shah

President

FICCI

FOREWORD by KPMG in India

By 2030, it is estimated[1] that there will be a shortage of 85 million for skilled workforce across the globe. What is interesting is, the skills that are required for these jobs are significantly different from what we train today. This pressing need for talent presents India with a unique opportunity to play a pivotal role in the global workforce, given its young, skilled, and adaptable labor pool. As one of the world's fastest-growing economies, India also a big needs a fair share of this talented workforce. Having said that, with its burgeoning young, educated and ambitious population, India is best positioned to address this globe talent gap through a careful, well-managed strategy for global placement of our talent pool.

This report delves into India's potential as a strategic supplier of skilled labor across key global regions: the Gulf Cooperation Council (GCC), Europe including the United Kingdom, and Australia. By examining current migration trends, evolving labor demands, and the socio-economic contributions of the Indian diaspora, this report provides a roadmap for India to capitalize on its demographic dividend. We explore the essential role of government initiatives, bilateral and multilateral agreements, and public-private partnerships in enabling safer, efficient, and mutually beneficial migration pathways.

Our findings in this report reinforce India's commitment to development of the nations it collaborates with for migration as well as the welfare of its migrant workforce. Towards the end of this report, we have recommendations for sector-specific skill development, regulatory reforms, and enhanced international collaboration, that are intended to support policymakers, industry leaders, and educational institutions in building India's global workforce footprint. By addressing existing challenges such as skill mismatches, exploitation, and evolving labor market needs, India can further cement its position as a preferred source of skilled talent on the international stage.

We hope this document will serve as a foundational guide for stakeholders seeking to harness the transformative power of India's global workforce for shared prosperity in the years ahead.

Narayanan Ramaswamy

Partner and Head of Education and Skill Development

KPMG in India

EXECUTIVE Summary

The global talent shortage is accelerating at an unprecedented rate, with a projected shortage of over 85 million skilled workers by 2030[2], driven largely by demographic shifts, technological advancements, and economic restructuring in many regions. India, with its abundant young and skilled workforce, has the potential to fill significant portions of these labor gaps, especially in high-demand areas, such as healthcare, technology, engineering, and green energy. This report explores India's expanding role in the global workforce across critical migration corridors, particularly to the Gulf Cooperation Council (GCC) countries, Europe including the United Kingdom, and Australia. It outlines emerging skill requirements, sector-specific demands, and the key government and industry initiatives shaping India's labor migration landscape.

Global Migration Corridors and Sector-Specific Demand for Indian Talent

i. GCC Region: Saudi Arabia, UAE, Qatar, Oman

The GCC nations have long relied on Indian labor for their infrastructure, healthcare, and domestic sectors. Over the years, the GCC has fostered strong diplomatic and economic ties with India, characterized by historical trade relationships and cultural exchanges. The Indian diaspora in the GCC, which is estimated to be 8,879,111 (as per the Minister of External Affairs) is one of the largest expatriate communities that significantly contributes to the region's socio-economic growth[3]. With ongoing economic diversification under initiatives like Saudi Vision 2030 and UAE Vision 2021, demand is shifting towards knowledge-intensive roles in sectors like IT, renewable energy, construction, and healthcare. Hence, the success for Indian immigrants in the GCC depends on possessing the right skills keeping with the change in the economy and demography. Some of the key emerging sector in GCC countries are:

- **Emerging Skill Requirements:** Smart city planning, IoT integration, and cybersecurity are in creasingly essential as GCC cities like Dubai and Riyadh integrate advanced technologies into urban planning.
- **Healthcare:** India has become a primary source of healthcare professionals, with doctors and nurses in high demand across GCC countries. However, there is growing demand for spe cialized skills in telemedicine and digital health services, as the region expands its healthcare offerings to meet the needs of a diversifying economy.
- **Renewable Energy:** The GCC's focus on transitioning from oil to renewable energy sources is creating opportunities for Indian engineers and technicians skilled in solar and wind energy systems.

ii. Europe and United Kingdom

Europe is facing severe skill shortages due to an aging population and increasing demand in high-tech and healthcare sectors. Within Europe, European Union plays an important role in providing a host of opportunities for skilled migrant workers. The EU has implemented various initiatives aimed at addressing skill shortages and attracting global talent, including from India. The introduction of frameworks, such as the Blue Card Directive, which facilitates the migration of highly-skilled workers, has made the region more accessible for qualified professionals European nations like Germany have eased immigration policies and introduced initiatives, such as the Skilled Immigration Act, to attract non-EU professionals, especially from India. Some of the key emerging sector in Europe is listed below:

- **Information Technology:** Germany and the Netherlands are prioritizing skills in software development, data science, and AI, with many job openings for Indian IT professionals.
- **Healthcare:** Countries like Germany, facing a significant shortfall in healthcare professionals, are attracting Indian nurses and medical technicians. Indian professionals with expertise in telemedicine, elderly care, and medical informatics are especially valuable due to the aging European population.
- **Renewable Energy and Engineering:** Europe's transition towards a green economy, under initiatives like the EU Green Deal, has opened doors for Indian engineers specializing in renewable energy technologies and sustainable infrastructure. Indian professionals with experience in green construction and carbon capture are increasingly sought after as Europe aims to reduce emissions.
- **Engineering and Construction:** Europe's shift toward sustainable infrastructure is creating a demand for civil engineers, mechanical engineers, and electricians. The European Construction Industry Federation (2023) forecasts a 10% annual growth in demand for skilled construction workers by 2025, particularly in sectors like renewable energy and sustainable building.

a. United Kingdom

Indian immigration to the UK has evolved significantly over the decades, reflecting broader global migration trends and socio-economic shifts. According to the International Organization for Migration (IOM) and the UN Migration Report 2023, India remains one of the top countries of origin for migrants due to its demographic dividend and economic opportunities provided by the UK, contributing to the UK's diverse and dynamic demographic landscape. As per the data reported by the Ministry of External Affairs (MEA)[4], government of India, there are approximately 18.6 lakh overseas Indians in the UK, with 14.9 lakh being persons of Indian origin and the remaining classified as NRIs.

The UK's post-Brexit immigration policy shift has made it easier for non-EU professionals to work in the country, especially under the Skilled Worker Visa and Health and Care Worker Visa programs. In 2023, an additional 2.5 lakh Indian immigrants moved to the UK driven by factors, such as employment opportunities, education, and personal reasons. Among them 127,000 Indians came on work visas, including 39,100 issues for Health & care roles, 115,000 for study and 9,000 for other reasons[5]. Indian nationals now represent a significant portion of skilled visas issued. Key emerging sectors with skilled workers requirement in UK is given below:

- **Healthcare:** The NHS is actively recruiting Indian healthcare workers, particularly in shortage areas, such as nursing and general practice. Additionally, there is a demand for skills in telehealth and mental health support as the UK addresses post-pandemic healthcare challenges.
- **Financial Services and IT:** With London being a global financial hub, there is an increased demand for Indian professionals in fintech, cybersecurity, and AI-driven financial services. Skills in blockchain technology and digital banking are particularly valuable as the UK strengthens its position in digital finance.
- **Construction and Infrastructure:** The UK's infrastructure projects have created job opportunities for skilled workers in engineering, project management, and construction technologies, including Building Information Modeling (BIM) and sustainable building practices.

GCC	Europe (Including the United Kingdom)	Australia
Emerging Sectors – Across all these sectors, there is growing demand towards skills pertaining to automation, AI, big data, predictive analytics, IoT, blockchain, management, resource efficiency and sustainability. *Identified list of emerging, required skill sector industry and country wise given in Annexure- 1*		
Construction and Infrastructure	Information Technology	Healthcare and Social Assistance
Oil and Gas	Healthcare	Education and Training
Hospitality and Service Industry	Engineering	Construction
Healthcare	Information Technology	Manufacturing (Engineering) sector
Retail and Trade	Healthcare	Profession, Scientific and Technical Services
Banking and Finance	Engineering	
Manufacturing and Industry	Financial services	
Information Technology	Education and research	
	Creative industries	

Table 1: Emerging Sectors across GCC, Europe (including the UK) and Australia

iii. Australia

There is a rapidly growing Indian community in Australia. According to the 2021 census, about 9,76,000 in Australia trace Indian ancestry. The Indian diaspora is the second largest and fastest growing diaspora in Australia. Indian students numbering 1,22,391 (September 2023) form the second largest cohort of foreign-born students in Australia[6]. Migration from India to Australia increased dramatically between 2006 and 2016, more than doubling the numbers of the India-born population. This surge in education-related and skilled migration coincided with a period of significant labour shortages across the economy during Australia's mining boom. Australia has also introduced new pathways for skilled migration, including the Global Talent Visa and the Skills in Demand visa, which prioritize professionals in critical areas, such as IT, engineering, and biotechnology. Key emerging sector in Australia are listed below:

- **Information Technology and Cybersecurity:** Australia is rapidly growing as a tech hub, with a focus on cybersecurity, AI, and data science. Indian professionals skilled in cloud computing, AI, and cybersecurity are well-positioned to meet Australia's demands.
- **Healthcare:** With a shortage in healthcare professionals, Australia is actively recruiting Indian doctors, nurses, and allied health professionals, especially in rural and remote areas. Skills in geriatric care and community health are increasingly in demand to support Australia's aging population.
- **Renewable Energy:** Australia's focus on clean energy initiatives, particularly in solar and wind, has increased demand for Indian engineers and technicians with expertise in renewable energy installation, maintenance, and grid management.

Challenges Hindering Workforce Mobility

Despite the opportunities, Indian workers face several challenges in the migration process especially in the context of migration to countries like Europe, Australia, the UK and GCC nation. Some of the key challenges are:

- **Regulatory and Immigration Barriers:** Indian workers often face complex immigration policies and visa restriction across all the destination countries. Each region has its unique via requirements, quotas and timelines which can be daunting and adds to the delay in the movement of the talent. Additionally work visa pathways may be limited or rigid, particularly in skilled categories, affecting skilled workers ability to enter these markets easily.
- **Recruitment Malpractices:** High recruitment fees and exploitative practices by agents remain significant challenges, particularly for workers migrating to the GCC. India's eMigrate system has provided safer channels, but challenges persist.
- **Policy Barriers and Skill Mismatches:** Policies like GCC nationalization efforts (e.g., Saudization, Emiratization) and evolving EU standards for qualification recognition limit opportunities for Indian migrants. For example, Indian medical degrees are not always recognized in Europe, making it difficult for Indian healthcare professionals to practice without additional certifications.
- **Wage Disparity and Rising Living Costs:** The increasing cost of living in GCC countries, coupled with stagnant wages, reduces economic incentives for Indian workers in low-skilled roles. Ensuring better wage structures and protections can enhance workforce sustainability.
- **Language and Cultural Barriers:** Language proficiency especially in regions, where English is not the primary language limits the employability of Indian workers. Cultural adaptation can also impact integration and productivity particularly in customer-facing roles or position requiring collaboration. Language is a must especially for the sectors like health and even in construction.

Strategic Initiatives and Government Interventions

India has undertaken various initiatives to support its workforce abroad and address the challenges as mentioned above. Some the key action taken include but not limited to:

- **Bilateral Agreements and FTAs:** India has signed several labor and trade agreements, such as the India-EFTA Trade and Economic Partnership Agreement (TEPA) and ongoing negotiations with the EU, aimed at easing labor mobility, recognizing qualifications, and establishing fair recruitment practices.
- **Skill Development Programs:** Programs like the Pravasi Kaushal Vikas Yojana (PKVY) and collaborations through the National Skill Development Corporation (NSDC) focus on aligning skill development with international requirements in sectors like IT, engineering, and healthcare.
- **Support through Digital Platforms:** The eMigrate system streamlines the migration process, ensuring legal protections and addressing recruitment fraud, particularly in GCC countries, where risks are higher.

Key Recommendations for Optimizing Workforce Mobility

- **Sector-Specific Skill Training:** Focus on developing skills for high-demand sectors, such as IT, healthcare, green energy, and engineering, tailored to meet the specific needs of GCC, European, UK, and Australian markets.
- **Regulation of Recruitment Practices:** Strengthen regulation of recruitment agencies, particularly for low-skilled workers, to prevent exploitation. Expanding the reach of eMigrate to cover more destination countries can help mitigate risks.
- **Recognition of Qualifications:** Negotiate mutual recognition of qualifications, especially in healthcare and engineering, with European and GCC countries to ensure Indian professionals can meet foreign standards without redundant certification processes.
- **Incentivize Public-Private Partnerships:** Encourage partnerships between Indian institutions and international employers to offer training programs that meet global standards, enhancing employability for Indian workers in specialized fields.
- **Promoting circular migration and mobility:** Involves encouraging temporary migration programs that allow workers to gain skills abroad and return to India, benefiting both the home and host countries. These programs could particularly benefit industries like agriculture and construction in host countries, where there is often a high-demand for skilled labor.

Conclusion

India has the potential to be a significant supplier of skilled labor, especially considering the growing global skill gap. Strategic initiatives to address recruitment malpractices, align skill development with global standards, and secure mutual recognition of qualifications will enable India to better support its migrant workforce and solidify its standing in the global labor market. Through a well-coordinated effort among government, private sector, and international stakeholders, India can ensure that its talent pipeline remains strong and competitive, while contributing to global economic growth.



INTRODUCTION

The world is in a race for high-skilled workers, and countries are tweaking immigration policies to attract the best and brightest to their shores. It is estimated that by 2030, demand for skilled workers will outstrip supply, resulting in a global talent shortage of more than 85.2 million people[7]. This global skills shortage could result in estimated $8.452 trillion in unrealized annual revenue by 2030—equivalent to the combined GDPs of Germany and Japan.

Global Talent Shortage: A 2030 Outlook



By 2030, the demand for skilled workers will outstrip the supply

85.2 Million

Projected Global Talent Shortage



$8.452 trillion to be lost in annual revenue



This loss is equivalent to the GDPs of Germany and Japan



The world is coming together to address the skill gaps and secure and Japan economic growth

In 2023, several countries that were previously hesitant about accepting migrants eased restrictions to address critical labour shortages. Meanwhile, the Gulf Cooperation Council (GCC) countries, major destinations for labour migrants from Asia, are implementing policies to reshape their labour force and redefine the role of migrant workers in the private sector.

In the coming decade, labour migration will be influenced by a growing demand for skills, demographic changes in destination economies, and policy shifts in traditional labour migration destinations. The year 2023 saw many countries, previously migrant-shy, ease restrictions to fill in critical labour shortages. In a significant policy shift aimed at addressing the increasing demand for skilled labour, Germany relaxed entry requirements for non-European Union (EU) nationals, particularly those with essential skills that are in high-demand in the job market. This initiative includes the modernization of the visa issuance process and the relaxation of other regulations to make Germany a more attractive destination for skilled Indian IT professionals. Similarly, Australia has introduced a new “Skills in Demand” visa as part of its strategy to address skill shortages and enhance worker mobility within the labour market. This visa is intended to replace the Temporary Skills Shortage (Subclass 482) visa and offers three distinct pathways: specialist skills, core skills, and essential skills. Additionally, the visa’s four-year validity period provides clear pathways to permanent residency[8]. Meanwhile, the Gulf Cooperation Council (GCC) countries, which are major recipients of labour migrants from Asia, are implementing policies to alter their labour force composition and redefine the role of migrant workers in the private sector.

In 2023, India had a net migration rate of approximately -0.329 per 1,000 population[9]. This means more people emigrated from India than immigrated to it. In comparison to other countries, India had one of the higher emigration rates globally. Over time, changes have come about not only in the nature of demand for labour across countries, but also in the talent pool available with India and the varied nature of mobility

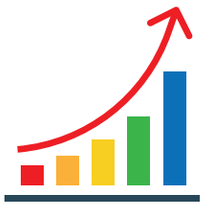
that is now needed to be addressed. Previously, migration from India predominantly involved low-skilled labor. However, there has been a notable shift towards migration for high-skilled employment, particularly to countries, such as the United States of America. At present, 65% of Indians are under 35 years old and are in the working age group.

This paper highlights emerging sectors, challenges and policy considerations which could strengthen India's mobility and migration across the globe, specifically to Europe, Australia, GCC countries (Qatar/Saudi Arabia/UAE and Kuwait) and United Kingdom. As India targets skilled migration to meet global labour demands with its growing young population, the government might prioritize, over time, mobility over migration. India's future strategy may include expanding migrant welfare policies abroad and emphasizing skill development through comprehensive policies, which is already being demonstrated through various G2G initiatives. This paper has been compiled based on secondary data analysis, trends, and patterns.

Unlocking Potential: How Skilled and Low-Skilled Migrants Transform Global Economy

Skilled migrants increase the income of the destination country. On average migrants tend to be younger than their adopted country's native-born population, they help increase the share of working age population. **A 1 percentage point increase in the share of migrants in the adult population increases GDP per person in advanced economies by up to 2 percent in the longer term. This increase comes primarily from an increase in labour productivity, instead of an increase in the workforce-to-population ratio[10].**

The Economic Impact of Migration



A 1% point rise in migrants in the adult population can boost GDP per capita by up to 2% in long run



Growt primarily results from increased labour productivity rather than a higher workforce-to-population ratio.



Countries experiencing low unemployment and strong manufacturing growth have rising labour shortages, accelerating automation and robotics usage.



India

is positioned to help address this labour supply gap, as it is projected to have a surplus of around

45.3 million skilled workers by 2030.

Along with highly-skilled migrants, low-skilled migrants also significantly boost overall productivity by complementing the existing skill set of the population, such as:

- They fill essential roles that are in short supply among the native-born population, enhancing economic efficiency.
- By taking on manual routine tasks, they enable the native-born population to shift to more complex jobs requiring language and communication skills, where they have a comparative advantage.
- A key example of this complementarity is the "nanny effect," where low-skilled migrants provide housekeeping and childcare services, allowing native-born women to return to work or extend their working hours. This results in higher participation of high-skilled females in the labour force.

In countries with low unemployment and booming manufacturing production, including the Czech Republic, Poland, Hungary and Slovakia, a labour shortage has already accelerated automation and increased use of robotics—not to replace people, but because there aren't enough of them to fill the factories[11]. India can help fill the labour supply as it is projected to have a skilled-labour surplus of around 245.3 million workers by 2030.[12]



2.1 Navigating Global Corridors: Middle East (GCC), UK, Europe, and Australia: Long-term data shows that international migration is not uniform across the world but is shaped by economic, geographic,

India's Global Impact



GCC coutries are the second- largest contributors to India's remittances. The UAE contributes

18%

making it the second-largest source after the U.S.A.



Southeast Asia and Japan are popular for Indian professionals

IT
Engineering
Healthcare



UK (2023), Indian nationals made up

31%

Work Visa issued, **highest for any nationality**

Germany issued

17,379

Work Visas to Indians in 2022.



Australia granted

45,820

skilled visas to Indians in 2023-24,

33.4%

of total skilled visas. Migration from India to Australia has increased by

48.3%

since 2018-19

demographic, and other factors, resulting in distinct migration patterns, such as migration "corridors" developed over many years[13]. Indian labour migration is concentrated along key global corridors, with the Gulf Cooperation Council (GCC) countries being the largest recipient of Indian workers. Data from the Ministry of External Affairs (MEA) show that an estimated 9 million Indian expats live and work in GCC countries, including 3.41 million NRIS living in the UAE, 2.59 million in Saudi Arabia, 1.02 million in Kuwait, 740,000 in Qatar, 7,00,000 in Oman and 3,20,000 in Bahrain[14]. Most of the Indian immigrants work in construction, manufacturing and service sectors in the region[15]. The GCC countries are the second most prominent contributors to India's remittance inflow, with the UAE alone contributing 18% to the total inflow. In fact, the UAE is the second-largest contributing country to India's remittances after the United States[16].

Southeast Asia[17], and Japan[18] are growing destinations for skilled Indian professionals, particularly in sectors like IT, engineering, and healthcare. The demand for Indian IT professionals has been notably high in Japan[19] and Singapore[20]. Additionally, countries like the UK[21], Germany[22], and the US[23] continue to attract Indian professionals, particularly in high-tech and healthcare industries. As per the migration statistics released by the Government of the UK for the year ending in June 2023, Indian nationals were the top nationality for visas in the 'Worker' category, representing almost one-third (31%) of grants, and were by far the top nationality for both the 'Skilled Worker' and 'Skilled Worker - Health and Care' visas[24]. Germany, too, issued a total of 17,379 work visas to Indians in 2022, reflecting the greatest number of work visas granted by the nation to nationals of any country in 2022.[25]

Australia's migration corridors, through programs like the Global Talent Visa, have also increasingly targeted highly skilled Indian workers in areas such as finance, IT, and academia. In 2023-24, around 45,820 skilled visas were granted to Indians, which represents 33.4% of the total skilled visas granted by the nation. The migration from India to Australia has shown a significant growth of 48.3% from 2018-19 to 2023-24.[26] These statistics reflect the growing role of Indian workers in global migration patterns.

2.2 G2G connect initiatives: Facilitating Skilled Migration:

India has implemented several Government-to-Government (G2G) agreements to streamline labour migration and protect its workers. For example, the Electronic Migrant Management System (eMigrate) ensures that recruitment for Indian workers abroad, specifically in 18 countries, including GCC nations[27], providing them safe and legal channels to protect their rights and dignity abroad.[28] This system has facilitated emigration clearance of 3,944,820 Indians till date.[29]

To further facilitate the emigration of skilled labour force, India has recently signed a Free Trade Agreement (FTA) with the European Free Trade Association (EFTA), which includes Switzerland, Iceland, Norway, and Liechtenstein. Trade and Economic Partnership agreement (TEPA) would accelerate creation of large number of direct jobs for India's young aspirational workforce in next 15 years in India, including better facilities for vocational and technical training. TEPA would accelerate creation of many direct jobs for India's young aspirational workforce in the next 15 years in India, including better facilities for vocational and technical training. TEPA also facilitates technology collaboration and access to world leading technologies in precision engineering, health sciences, renewable energy, Innovation and R&D.

Additionally, India is negotiating FTAs with other countries, such as the United Kingdom, which also focus on greater mobility for skilled professionals in sectors like IT and healthcare.[30] These agreements are part of India's broader strategy to boost exports and ensure greater market access for its goods and services, while also facilitating the movement of skilled labour to meet global demand. In regions dependent on a limited number of industries, skill development can support economic diversification by preparing workers for roles in emerging sectors.[31]

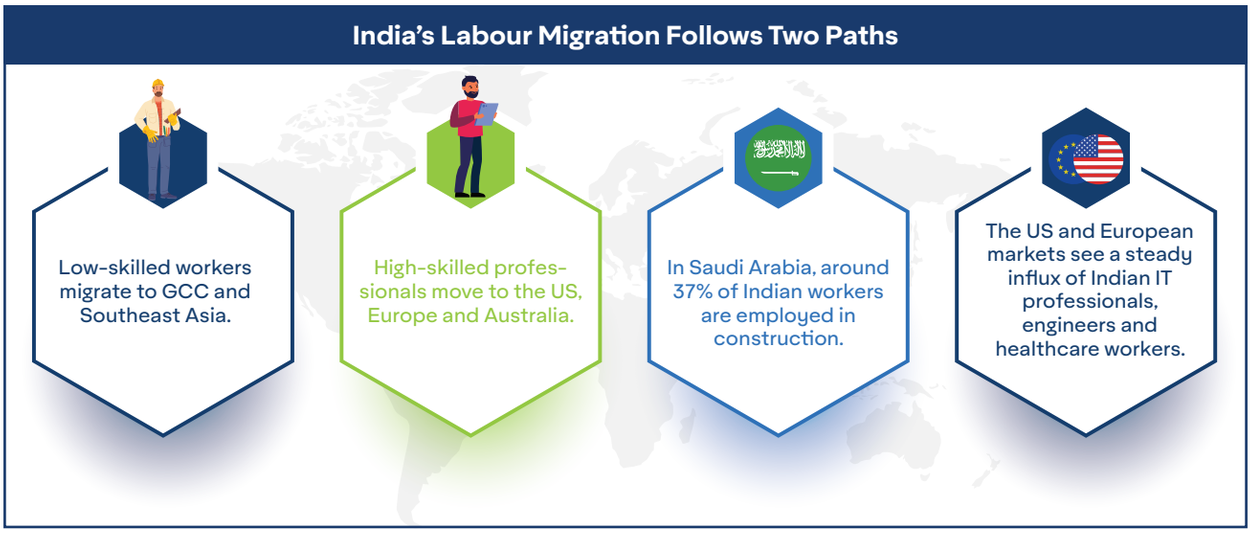
The global demand for skilled workers with specialized knowledge in areas like plumbing, nursing, driving, research and innovation, IT and care work is rapidly increasing. This surge in need for expertise is reflected in the accelerated pace of India's migration and mobility negotiations with numerous countries since 2015.

With the rise of the fourth industrial revolution, India's focus on skilling, re-skilling, and up-skilling its workforce in areas like IT, AI, and other advanced technologies positions it as a leader in providing skilled labour.

These agreements reflect the new realities and transformations in global migration dynamics. Globalization, technological advancements, and improved communication have created an interconnected world with transnational worker mobility. There is a growing global demand for workers with specific domain knowledge in fields such as plumbing, nursing, driving, research and innovation, IT, and care work. This need for specialized workers is expected to increase, as evidenced by the accelerated pace of India's negotiations on migration and mobility with many countries since 2015.

India has signed bilateral agreements with countries like Saudi Arabia, Qatar, the UAE, and Kuwait to regulate employment terms and protect migrant workers' rights.[32] These agreements not only provide a framework for fair treatment but also include provisions for social security benefits and grievance redressal mechanisms. Similarly, India's Technical Intern Training Program (TITP) with Japan aims to provide skill enhancement opportunities for Indian workers in sectors like healthcare and elder care, which are critical to Japan's aging population. As of March 2024, around 1340 interns from India have been sent to Japan to avail internship in sectors like healthcare, manufacturing, construction, etc.[33] This collaboration enhances skill development, while addressing the demographic challenges in Japan, thereby benefiting both the nations.

These agreements reflect the new realities and transformations in global migration dynamics. Globalization, technological advancements, and improved communication have created an interconnected world with transnational worker mobility. India has a large skill pool and demographic dividend, which it can reap in coming times. It is a significant contributor to the global workforce. With the rise of the fourth industrial revolution, India's focus on skilling, re-skilling, and up-skilling its workforce in areas like IT, AI, and other advanced technologies positions it as a leader in providing skilled labour.



2.3 Trends in Indian Labour Migration – Countries, Sectors, and Opportunities:

India's labour migration is characterized by two distinct trends: low-skilled workers migrating primarily to the GCC and Southeast Asia and high-skilled professionals moving to the US, Europe, and Australia. As per the Ministry of External Affairs (MEA), around 3,54,21,987 Indians are living and working abroad, with thehighest concentration in the USA (54,09,062), the UAE (35,68,848), Malaysia (29,14,127), Canada (28,75,954) and Saudi Arabia (24,63,509).[34]

The construction and infrastructure sectors in the Middle East absorb a significant number of Indian workers. For example, in Saudi Arabia, around 37% of Indian workers are employed in construction.[35] In contrast, the US and European markets see a steady influx of Indian IT professionals, engineers and healthcare workers. The demand for healthcare professionals in countries like the UK and Germany has particularly surged post-pandemic. As per the data released by the House of Commons, UK, there are around 60,533 Indian healthcare professionals in the region, which is second to that of British healthcare professionals. [36]

Aging Populations and the Care Economy



Asia and Europe are home to some of the world's oldest populations, driving the demand for care workers.

The growing care economy presents global opportunities for the Indian workforce.

According to the International Labour Organisation, doubling investment from 2015 levels would result in

117 Million

additional jobs opportunities by 2030

The growing aging populations in Asia and Europe, which are home to some of the world's oldest populations, have led to the rise of the care economy, requiring a skilled workforce. Japan leads with 28% of its population aged 65 and above, followed by Italy at 23%. Finland, Portugal, and Greece complete the top five, each with just under 22%. This presents another opportunity for the Indian workforce with employment opportunities globally. Experts believe that increased funding in the care economy should be considered essential, as, according to the ILO, doubling investment from 2015 levels would result in 117 million additional jobs opportunities by 2030.[37]

These migration trends highlight India's role as a key contributor to global labour markets, particularly in sectors like construction and manufacturing, IT, and healthcare, which are vital for both economic development of destination countries and remittance inflows to India.

2.3.1 Indian Migration Patterns: Skills, States and Global Opportunities. Key States Involved in Global Export of Manpower:

Indian labour migration is concentrated in a few key states, with Uttar Pradesh, Bihar, Tamil Nadu, and Kerala leading the way.[38] Migration from the densely populated northern states of Uttar Pradesh and Bihar primarily consists of semi-skilled and unskilled workers, while migrants from the southern states of Kerala and Tamil Nadu generally possess higher educational qualifications. According to a report by the Kerala Migration Survey, Kerala has over 2 million emigrants, the highest among Indian states, primarily heading to the Middle East.[39] Uttar Pradesh and Bihar have seen a significant increase in migration, particularly for low-skilled jobs in the Gulf. In fact, Uttar Pradesh, Bihar, Rajasthan, and Tamil Nadu are the highest contributors to the migration of construction workers from India to the GCC countries.

Key Indian States Leading Labour Migration

Indian labour migration is concentrated in a few key states with Uttar Pradesh, Bihar, Tamil Nadu and Kerala leading the way.

Kerala has
2 million +
emigrants, the highest among Indian states,* most migrating to the Middle East.

*Kerala Migration Survey



2.4 India's Gains from Migration Corridors: Remittances, Job Opportunities and Skill Enhancement:

One of the most significant benefits of labour migration for India is the remittance flow. As per the Migration and Development Brief by the World Bank, the inward remittances to India in 2023 rose by 12.3 per cent to $125 billion, accounting for 3.4 percent of its gross domestic product (GDP). In 2022, India's inward remittances stood at $111.22 billion.

The main contributing factor to rising remittances to India was declining inflation and strong labour markets in high-income source countries, which boosted remittances from skilled Indians in the United States, United Kingdom, and Singapore. These three countries account for 36 per cent of total remittance flows to India.[40] Between 2016–17 and 2020–21, the share of remittances from the US, the UK, and Singapore increased from 26 percent to over 36 percent, while the share from the five GCC countries (Saudi Arabia, United Arab Emirates, Kuwait, Oman, and Qatar) dropped from 54 to 28 percent, according to an RBI survey.[41] This shows there has been steady increase in skilled workforce movement leading to an increase in overall remittance.

These funds not only play a critical role in sustaining families in migrant-sending states but also contribute to national economic growth. Labour migration also creates employment opportunities for millions of Indians and contributes to skill development. Migrants often return with enhanced skills and experiences, especially from high-tech sectors, which benefit India's economy and workforce development. Furthermore, global mobility increases the adaptability of Indian workers to new markets and technologies, enhancing their career mobility. In future, there is a need for working on both migration and mobility of labour in the evolving global economy.

India's Rising Remittances

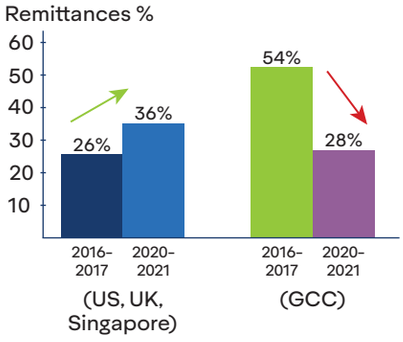
In 2023*, Inward remittances to India rose by **12.3%** to **$ 125 billion** counting **3.4% of GDP**

*Migration and Development Brief by the World Bank

The US, UK and Singapore together account for

36% of total remittances flow to India.

Remittances from these countries increased due to strong labour markets and declining inflation.



Between 2016-17 and 2020-21* remittances from the US, UK and Singapore rose from **26%** to **36%**

In the same period, Remittances from the GCC countries dropped from **54%** to **28%**

This shift highlights the increasing movement of India's skilled workforce.

*RBI survey

3.1 Introduction Middle East-Gulf Cooperation Council (GCC) Corridor and Indian Relations:

The Gulf Cooperation Council (GCC), comprising Saudi Arabia, Kuwait, the United Arab Emirates (UAE), Qatar, Bahrain, and Oman, was established in 1981 to promote regional cooperation and security amidst geopolitical tensions in the Middle East. Over the years, the GCC has fostered strong diplomatic and economic ties with India, characterized by historical trade relationships and cultural exchanges. The Indian diaspora in the GCC, which is estimated to be 8,879,111 (as per the Minister of External Affairs) is one of the largest expatriate communities that significantly contributes to the region's socio-economic growth.[42] India also has a strong trade tie with GCC countries which has grown remarkably in recent years, with a total value of approximately USD 184 billion in FY 2022-23, representing a 20 percent increase from the previous year.[43] Historically, Indian immigration to the GCC has been driven by labour demand, particularly in sectors like construction, healthcare, and information technology.

> The GCC countries are expanding their economies beyond oil and gas, with a growing emphasis on technology, finance, and tourism. As a result, there is a high demand for skilled workers in both traditional fields and emerging industries.

However, the future success for Indian immigrants in the GCC depends on possessing the right skills keeping with the change in the economy and demography. GCC countries are diversifying their economies beyond oil and gas, focusing on sectors like technology, finance, and tourism. Hence, skill proficiency in traditional and emerging job sectors is highly sought after. Developing vocational and English language skills, along with cultural adaptability, is essential to navigate local customs and workplace norms effectively.

Investing in skill development and education initiatives is crucial for Indian immigrants to take advantage of the numerous opportunities that the GCC presents. India's historic ties and cultural exchanges with the GCC have resulted in remarkable growth in bilateral trade and the presence of a significant Indian diaspora. Therefore, both India and the GCC must focus on nurturing and improving their relationship while creating a more sustainable and mutually beneficial partnership. For this report, we would be focusing only on skilled workforce mobility to UAE, Qatar, Kuwait, and Saudi Arabia.

3.1 Migration/Employment Numbers:

Indian immigrants constitute a significant portion of the expatriate workforce in the Gulf Cooperation Council (GCC) countries, particularly in Saudi Arabia, Kuwait, Qatar, and the United Arab Emirates (UAE). The Indian community constitutes the largest expatriate group in the UAE, representing almost 30 percent of the total population.[44] Most migrants are between 20 and 40 years of age. The Indian community in the region also runs schools, restaurants, clubs, and other organizations. The Kingdom of Saudi Arabia (KSA) and the United Arab Emirates (UAE) are the most popular destinations, hosting over 60% of Indian workers. According to data from the Indian Ministry of External Affairs,[45] the total number of Indian immigrants is 2,460,603 in Saudi Arabia, 993,284 in Kuwait, 835,175 in Qatar, and 3,554,274 in the UAE.

Indian Expatriates in the UAE



The Indian community is the **largest expatriate group** in the UAE, making up almost **30%** of the total population



Most Indian migrants in the UAE are aged between **20–40 years**

There is evidence of regional shifts in Indian migration, with Saudi Arabia experiencing a gradual decline in its share, as more Indian migrants head to other GCC countries like Oman and the UAE. Oman, has shown consistent growth, solidifying its status as a key destination for Indian labour, while Qatar has seen steady growth driven by infrastructure projects and economic diversification.

Indian migration to GCC countries has shown an overall increase in recent years. However, there is also evidence of regional dispersion wherein Saudi Arabia has seen a gradual decline in the number of Indian migrants losing its share to other GCC countries like Oman and the UAE. Meanwhile, Oman has shown consistent growth, indicating its increased importance as an attractive destination for Indian labour, and Qatar has seen steady growth due to ongoing infrastructure and economic diversification initiatives.[46&47]

3.2 Key Trends and Factors Driving Growth and Change:

3.2.1 Economic Opportunities:

- **Demand for Labour:** Traditionally GCC countries have high demand for skilled and semi-skilled labour, particularly in sectors like construction, oil and gas, healthcare, and services.[48] In recent time, GCC countries are also seeing increasing demand for skilled workforce in sectors related to digital transformation, renewable energy, and biotechnology. The region is heavily investing in digital transformation across industries. Programs like Saudi Vision 2030 and UAE Vision 2021 are central to these efforts. There is rising demand for workers skilled in information technology, cybersecurity and digital services. By 2025 an estimated 1.3 million new digital jobs could be created, with Saudi Arabia expected to contribute 700,000 of those. In addition, as part of the transitioning away from oil, there is a growing focus on clean energy solutions like solar and wind power. There has also been significant investment in healthcare, biotechnology and nanotechnology creating a need for professionals in medical technology, pharmaceuticals, and healthcare management. The emphasis on technology-driven sectors and diversification means that GCC countries will continue to rely heavily on foreign expertise to fill gaps in their local labour force particularly in high-tech and knowledge-intensive fields.

The GCC is experiencing a rising demand for skilled workers in



Digital Transformation

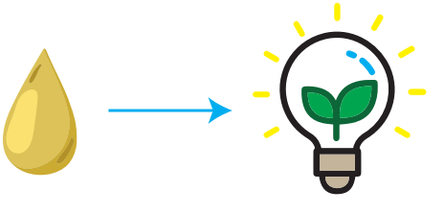


Renewable Energy



Biotechnology

The region is heavily investing in digital transformation, driven by initiatives like Saudi Vision 2030 and UAE Vision 2021.



As the GCC transitions away from oil, there is a growing emphasis on clean energy solutions, particularly solar and wind power.

By 2025, an estimated **1.3 million new digital jobs** are expected to be created in the GCC, out of which **7,00,000** will be created in Saudi Arabia.

- **Higher Wages:** The opportunity to earn higher wages compared to India is a major pull factor. Wage levels for Indian migrants in the Gulf vary significantly based on the sector and skill level. The average wage in Gulf countries is at least 10 times higher than India's average wages as of 2023 (OECD).[49] For unskilled workers, especially in the construction and mining industries, minimum or public wages are key indicators driving Indian migration to the Gulf region. As per KNOMAD[50] Survey on Migration Cost in India – Saudi Arabia Migration Corridor, earnings in India prior to migration for a person average is

> In 2023, average wages in Gulf countries are at least 10 times higher than in India (OECD). According to the KNOMAD Survey on India-Saudi Arabia migration corridor, the average pre-migration income in India is $162.44, while the first month gross earnings in Saudi Arabia rise to $325.20, highlighting the significant wage increase for migrants.

$162.44, while first-month gross earning in Saudi Arabia is $325.20. While Kuwait and Bahrain do not have official minimum wages, the figures provided represent state wages paid to unskilled workers. Similarly, although Saudi Arabia's minimum wage applies exclusively to nationals, even after adjustments, Indian labourers still find significant advantages in migrating to Gulf countries. (OECD)[51]

- **Tax-Free Income:** Many GCC countries like UAE offer tax-free or tax-friendly income, making it more attractive for Indians seeking to save money.

3.2.2 Established Migration Networks:

Long-established migration routes and the presence of large Indian communities in GCC countries make the migration process easier and more attractive. In addition to this, formal and informal recruitment agencies have helped facilitate this migration, offering connections between Indian workers and GCC employers.

3.2.3 Government Policies and Bilateral Agreements:

India has established several agreements with GCC nations to protect the rights of Indian workers and enable them to move to the region without much hustle. For instance, the Joint India-UAE Vision recognizes the importance of skill cooperation between the two nations and values the contribution of the skilled workforce from India in various economic sectors in the UAE.[52] The MoU signed between these two nations focusing on 'cooperation in the field of manpower,' also ensures the deployment of manpower in accordance with the principles of transparency, ethical recruitment and fairness.[53] Bilateral Labour Agreements like Establishment of Indian Community Welfare Fund, Overseas Workers Resource Centre, Bilateral Social Security Agreements and Indian Workers Resource Centre, provide safety and security to Indian migrant workers in GCC countries like Bahrain, Kuwait, Oman, Qatar, and UAE.[54] India has been working continuously in establishing safe corridors for Indian workers in GCC countries. In this regard some notable bilateral agreements between India and Gulf States are given below:[55]

- **India-UAE Comprehensive Economic Partnership Agreement (CEPA):** Signed in 2022, this agreement aims to enhance trade and economic cooperation between India and the UAE.
- **India-Saudi Arabia Strategic Partnership Council Agreement:** This agreement, signed in 2019, focuses on strengthening strategic ties, including economic, security, and cultural cooperation.
- **India-Qatar Bilateral Investment Promotion and Protection Agreement (BIPPA):** Signed in 1999, this agreement aims to promote and protect investments between the two countries.
- **India-Oman Agreement on Defense Cooperation:** Signed in 2005, this agreement enhances defense cooperation, including joint exercises and training.
- **India-Kuwait Agreement on Labour and Employment:** Signed in 2007, this agreement focuses on the welfare and protection of Indian workers in Kuwait.
- **India-Bahrain Memorandum of Understanding (MoU) on Labour and Employment:** Signed in 2014, this MoU aims to enhance cooperation in labour and employment, including the protection of workers' rights.

In addition to the above, creating streamlined visa and work permit processes by GCC nations has also encouraged migration by making it easier to obtain entry.[56] Several GCC countries including UAE, Qatar, Kuwait, and Saudi Arabia have recently introduced significant changes to streamline their visa and work permit processes, making migration easier than ever before. These changes have been introduced to facilitate hassle-free immigration for international candidates who are seeking work and investment opportunities in the region.

Recent Visa and Employment Initiatives in the GCC



UAE - Remote Work Visa

Designed to attract remote workers seeking short-term stays.



Qatar - Wage Protection System

Enhances transparency and regulates the number of expatriates in specific industries.



Saudi Arabia - E-Visas

Offered to travellers from 49 countries via online portal.



Kuwait- Partnership Visa

Aims to attract international entrepreneurs.

Among the changes, UAE has introduced a new remote work visa, which is aimed at attracting remote workers who are looking for a short-term stay. Qatar has implemented a new wage protection system, which enhances transparency and limits the number of expatriates in certain industries. Saudi Arabia is offering e-visas to travelers from 49 countries under its new online visa portal. While Kuwait has rolled out a new partnership visa to attract international entrepreneurs.

The introduction of these streamlined visa and work permit processes is expected to attract highly skilled migrants and investments to the region and foster cultural exchange. This is poised to create economic growth in the region and further strengthen the existing economic stability.

3.3 Key Sectors and Job Roles:

At present, Indian migrants in the Gulf region are predominantly employed in a variety of sectors, including construction, domestic work, healthcare, and engineering. However, the construction sector remains the largest employer, absorbing a significant portion of low-skilled and semi-skilled workers. In contrast, the healthcare and engineering sectors attract skilled professionals, such as doctors, nurses, and engineers.

Indian migrants to the Gulf can be categorized into four main types:[57]

- **Business Migrants:** Individuals moving for business opportunities.
- **Professional Migrants:** Skilled professionals in education, medicine, and engineering.
- **Technical Workers:** Those employed in technical roles within the GCC.
- **Unskilled/Semi-Skilled Workers:** Workers in construction, domestic work, transportation, etc.

The GCC countries-United Arab Emirates (UAE), Saudi Arabia, Kuwait, and Qatar – classify jobs based on experience or education into the following three categories. These categories help define roles within the labour market.[58] They are:

- **High-skilled:** Jobs requiring specialised education, training, and experience. Sectors, such as technology, finance, healthcare and engineering fall under this category. In UAE, the recent years have seen a boom in high-skilled jobs. For example, in 2023, jobs in information and communication (Including IT) sector of the country have seen a growth of 77%, whereas professional, scientific and technical jobs have seen a growth of 30%.[59]

Employment Trends and Job Growth in GCC



Significant growth in High Skilled Job Sectors in the UAE (2023)

77% growth
in Information and Communication Sector (Including IT)

30% growth
in Professional, Scientific and Technical Jobs

Middle-Skilled Roles in Saudi Arabia

Commonly found in Logistics and Administrative Support.





Low-Skilled Workforce in the UAE

Approximately 5 million low-skilled workers from India, Pakistan, Bangladesh and the Philippines work in the country.

- **Middle-skilled:** These jobs require moderate training and education and are found in administrative, sales, and financial roles, especially in the service sector. In Saudi Arabia, middle skilled roles are often found in logistics and administrative support.
- **Low-skilled:** These jobs require minimal training and education typically in sectors like construction and hospitality. Most low-skilled jobs include manual labour and housekeeping. In the UAE, there are about 5 million 'low-skilled' workers from India, Pakistan, Bangladesh, and the Philippines, making up the largest segment of population. Additionally, the nature of work helps to categories jobs into occupational classification.[60]

The employment landscape in the GCC is widely seen based on sector distribution with a larger domination of service sector, followed with industrial sector, which includes manufacturing and construction and finally the agriculture sector.

Initially driven by the oil boom in the 1970s, migration has transitioned from predominantly low-skilled labour to a substantial influx of skilled professionals.

Expatriates dominate the labour market in Kuwait, where the main high-skill sectors include healthcare, engineering, and finance. The UAE is also working on developing an occupational classification scheme to classify over 700 job titles across nine professional levels and five skill levels, with Level One representing highly-skilled specialists and Level Five lower skilled employees.[61]

In Qatar, high-skilled jobs are prevalent in construction management, engineering, and IT. The service sector employs 47.6% of the country's workforce, while industry sector-driven by construction projects accounts for 51.8% of total employment.

Moreover, the pattern of Indian migration to the Gulf has evolved significantly over the decades. Initially driven by the oil boom in the 1970s, migration has transitioned from predominantly low-skilled labour to a substantial influx of skilled professionals. According to the Skill Gap Study conducted by NSDC,[62] below are the sectors and job role that are emerging in GCC countries:

Sector	Potential Replacement and New Jobs for Indians, GCC (3 Countries) ('000)	In % Terms
Construction	1170	44.4%
Wholesale and Retail Trade, Repair of Motor Vehicles and Motorcycles	423	16%
Real Estate and Business Services	283	11%
Transport Storage and Communication	274	10%
Financial and Insurance Activities	87	3.3%
Manufacturing	250	9.5%
Community, Social and Personal Services	140	5.3%
Total	2634	100%

Figure 1: Sectors and Job Role that are Emerging in GCC Countries

To conclude, sectors like construction and infrastructure, oil and gas, hospitality and service industry, healthcare, retail and trade, banking and finance, manufacturing and IT are the sectors, where Indian migrants are majorly employed.

3.3.1 Future Trend of Key Jobs and Sectors:

Key Trends and Insights

- **Market Growth:** The GCC labour market is expected to grow at a CAGR of 2.60%[63] between 2024 and 2032. This expansion will be driven by factors, such as economic diversification, demand for skilled labour, and industrial development across sectors like technology, healthcare, and renewable energy.
- **Economic Development:** The demand for labour is driven by the need to boost economic and industrial development in the region.

- **Favorable Labour Laws:** The region's favorable labour laws, including tax relief, better access to health services, paid leave, and prevention of discrimination, are attracting both domestic and foreign workers.
- **Industrial Automation:** There is a growing emphasis on industrial automation and upgrading services, which is generating a high demand for skilled labour.
- **Sectoral Demand:** Rapid industrialization and commercialization are increasing labour demand across various sectors, such as food service, oil and gas, manufacturing, healthcare, and hospitality. Based on the GCC Labour Market report by Expert Market Research[64], here are the detailed data points for each skill and the requirement of workers:

Sector	Estimated Workforce Needs	In % Terms
Oil and Gas	200,000 New Jobs by 2030	80%
Construction and Infrastructure	>1 Million Workers by 2025	90%
Health	~500,000 by 2030	70%
Information Technology	~300,000 by 2030	75%
Renewable Energy	150,000 New Jobs by 2030	80%
Tourism and Hospitality	Over 400,000 Jobs by 2025	85%
Education and Training	Around 250,000 Educators by 2030	50%
Manufacturing	~350,000 Workers by 2030	85%
Financial Services	100,000 New Jobs by 2030	60%
Logistics and Supply Chain	Over 200,000 Jobs by 2025	80%

Figure 2: Sector Wise Requirement of Workforce in GCC Countries

3.4 Top Skills Required in these Job Roles and Emerging Skills:

3.4.1 Construction and Infrastructure:

Top Skills:

- **Technical and Engineering Expertise:** Skills in civil structural, and mechanical engineering are crucial, as large-scale infrastructure projects like NEOM in Saudi Arabia, Expo projects in Dubai dominate the region.
- **Project Management:** The ability to manage large, multi-phase construction projects efficiently and within international safety standards.
- **Health, Safety and Environment (HSE) Compliance:** A deep understanding of GCC-specific labour and safety regulations.

Emerging Skills:

- **Smart Cities Development:** With mega projects like Qatar's Lusail City and Saudi Arabia's NEOM, skills in smart city planning and IoT integration are highly sought after.
- **Green Construction:** Knowledge of sustainable construction techniques, LEED certification, and renewable energy solutions for buildings is becoming essential.
- **Digital Construction Technologies:** Expertise in Building Information Modeling (BIM) and the use of drones and AI for site management and inspection.

3.4.2 Oil and Gas:

Top Skills:

- **Technical and Expertise in Drilling, Refining and Petrochemical Processes:** The GCC countries are renowned for their advanced technical expertise in drilling, refining, and petrochemical processes, necessitating a highly-skilled workforce to maintain and enhance their industry-leading operations especially in Saudi Arabia and UAE.
- **Project Management:** Handling large oil and gas projects and complying with strict timelines and budgets.
- **Health, Safety and Environment (HSE) Knowledge:** Given the hazardous nature of oil and gas, professionals must be well-versed in safety protocols and risk management.

Emerging Skills:

- **Renewable Energy Integration:** As GCC countries invest in solar and other renewable sources, skills in hybrid energy solutions and clean energy management are gaining importance.
- **Digital Transformation:** Skills in automating oil and gas operations using AI, predictive analytics, and digital twins are emerging as the sector modernizes.
- **Carbon Capture and Sustainability:** With global environmental pressures, expertise in carbon management and sustainable extraction practices is growing.

3.4.3 Hospitality and Service Industry:

Top Skills:

- **Multilingual and Multicultural Skills:** The diverse population and tourist influx in cities like Dubai and Doha demand strong communication skills in English, Arabic and other languages.

- **Customer Service Excellence:** High standards of customer service are expected, especially in the luxury and high-end segments.
- **Hotel and Event Management:** Strong organizational skills managing international events and hospitality services.

Emerging Skills:

- **Sustainability in Tourism:** GCC countries are focusing on eco-friendly tourism, requiring skills in green hotel management and sustainable tourism operations.
- **Cultural Tourism Management:** Expertise in promoting local heritage and cultural tourism aligned with visions like Saudi Arabia's Vision 2030.

3.4.4 Healthcare:

Top Skills:

- **Clinical Expertise and Patient Care:** Highly-skilled doctors, nurses, and healthcare workers are in demand in this region, especially in specialized fields like cardiology, oncology and neurosurgery.
- **Healthcare IT Systems:** Proficiency in using electronic medical records (EMR) and other digital tools.
- **Compliance with GCC Health Regulations:** Knowledge of local healthcare standards and regulatory bodies like HAAD (Abu Dhabi Health Authority) and DHA (Dubai Health Authority).

Emerging Skills:

- **Telemedicine and Digital Healthcare:** As the region is moving towards digital healthcare, professionals skilled in telemedicine platforms and remote diagnosis are in demand.
- **AI in Diagnostics:** Expertise in using AI-driven diagnostic tools, robotic surgeries and smart healthcare systems.
- **Health Data Analytics:** Skills in managing and interpreting big data for healthcare optimization are crucial in driving digital transformation of healthcare in the region.

3.4.5 Retail and Trade:

Top Skills:

- **Sales and Marketing:** Understanding of both traditional and modern sales techniques, especially in sectors like luxury goods and electronics.
- **Inventory and Supply Chain Management:** Efficiency in managing global supply chain and logistics, especially with the rapid growth of e-commerce in the GCC.

Emerging Skills:

- **E-commerce and Digital Marketing:** With the rise of online retail, skills in e-commerce platforms, digital payment solutions, and SEO are critical in the region.
- **Omni-Channel Retail:** Expertise in integrating in-store and online shopping experience with a focus on data-driven customer insights.
- **Sustainable Retailing:** Skills in sustainable retail practices, such as eco-friendly packaging and ethical sourcing are increasingly important in the region.

3.4.6 Banking and Finance:

Top Skills:

- **Financial Analysis and Management:** Strong analytical and accounting skills for corporate finance, wealth management and retail banking.
- **Regulatory Compliance:** Knowledge of AML (Anti-Money Laundering) laws and other GCC specific financial regulations.
- **Customer Service and Relationship Management:** Expertise in handling VIP and high-net-worth clients is highly valued.

Emerging Skills:

- **Fintech and Digital Banking:** As GCC countries modernize their banking systems, skills in blockchain, cryptocurrency and mobile banking technologies are in demand.
- **Cybersecurity in Finance:** Protecting against cyber threats is crucial, requiring skills in cybersecurity frameworks and fraud prevention.
- **Green Finance:** Knowledge of ESG (Environmental, Social and Governance) investment strategies is growing, as sustainable investments gain traction.

3.4.7 Manufacturing and Industry:

Top Skills:

- **Production Management and Quality Control:** Ensuring efficiency and high-standards in factories and production.
- **Engineering and Mechanical Skills:** Expertise in operating and maintaining industrial machinery.
- **Supply Chain Optimization:** Ensuring smooth logistics and raw material management.

Emerging Skills:

- **Industry 4.0 Technologies:** Skills in automation, AI-driven production, robotics, and smart factories are becoming crucial in this region.
- **Additive Manufacturing (3D Printing):** As GCC countries diversify, expertise in advanced manufacturing techniques like 3D printing is becoming relevant.
- **Sustainability in Manufacturing:** With a growing focus of GCC countries on reducing environmental impact, skills in sustainable manufacturing and resource efficiency are increasingly valuable.

3.4.8 Information Technology:

Top Skills:

- **Software Development and Coding:** Expertise in programming languages, cloud computing, and network administration.
- Cybersecurity

Emerging Skills:

- **AI and Machine Learning:** The GCC is investing heavily in AI-drive tech solutions for sectors like healthcare, retail and smart cities. Hence, AI and ML are emerging as crucial skills for immigrants to possess.

3.5 Existing Challenges and Forthcoming Challenges to be Addressed:

Workforce mobility from India to GCC countries has facilitated the large-scale migration of workers, particularly in sectors, such as construction, domestic work, and healthcare. However, Indian immigration in GCC countries faces numerous challenges, including exploitation, high recruitment fees, contract substitutions, legal and visa issues, limited support services, poor living conditions, language barriers, and discrimination. Between 2019 and June 2023, the Ministry of External Affairs, India registered 48,095 complaints of abuse with Kuwait leading at 23,020 complaints, followed by Saudi Arabia with 9,346[65]. To address the issue of Indian immigrants it is important to understand several existing and forthcoming challenges that need to be addressed to ensure smoother migration, fair labour practices, and workforce protection. These challenges span economic, regulatory, and social issues.

A. Existing Challenges:

1. Worker Exploitation and Rights Violations:

- A major issue for Indian migrants in GCC countries is the exploitation of low-skilled workers, especially under the kafala (sponsorship)[66] system, which binds workers to their employers, limiting mobility and making them vulnerable to abuse. Instances of with held passports, delayed wages, and unsafe working conditions are common concerns. This system is specifically detrimental to women, who are employed as domestic help as women domestic workers in Gulf countries are not covered under the labour laws.

2. High Recruitment Fees and Exploitation by Agents:

- Recruitment agencies often charge exorbitant fees, leaving workers in debt even before they migrate. Although both Indian and GCC governments have taken steps to regulate recruitment processes, illegal practices continue. This creates significant financial burdens for low-income workers.

3. Health and Safety Concerns:

- Migrant workers, particularly in construction, face poor working conditions with inadequate safety measures, long working hours, and exposure to extreme heat. Many are not provided proper healthcare, and deaths from occupational hazards are reported, especially in Qatar and Saudi Arabia.

4. Limited Access to Legal Recourse:

- Workers have limited access to justice in the GCC, due to both language barriers and the slow legal processes for lodging complaints. Many Indian workers do not pursue their cases.

B. Forthcoming Challenges:

1. Nationalization Policies (e.g., Saudization, Emiratization):

- As part of their economic diversification efforts, GCC countries are increasingly promoting employment for their own nationals, especially in the private sector. These policies, like Saudi Arabia's Saudization and the UAE's Emiratization, aim to reduce reliance on foreign workers, which could limit job opportunities for Indian migrants in the future.

2. **Skills Mismatch:**

- The GCC's shift toward knowledge-based economies is creating a growing demand for skilled labour in sectors like information technology, healthcare, and renewable energy. However, many Indian migrants are unskilled or semi-skilled, which may not match the evolving labour market needs. As the region continues to prioritize diversification, the competition for skilled labour will increase, requiring India to focus more on upskilling and reskilling its workers.

3. **Wage Disparity and Inflation:**

- The cost of living in GCC countries has risen significantly, yet many migrant workers continue to face stagnant wages. With inflation, the disparity between wages and living expenses could worsen, impacting the economic benefits of migrating for low-income workers.

4. **Health and Well-being Post-Pandemic:**

- The COVID-19 pandemic revealed vulnerabilities in the treatment of migrant workers, many of whom were left stranded or without employment during the lockdowns. Moving forward, ensuring health security, pandemic preparedness, and access to social protection will be crucial in preventing similar challenges in the future.

5. **Environmental and Climate Risks:**

- GCC countries face rising temperatures and extreme weather conditions due to climate change, which could impact sectors like construction that are reliant on migrant labour. Protecting workers from environmental risks and improving workplace conditions will be essential as these risks increase.

3.6 Interventions Required to Enhance Global Skills for Indians[67]

- **Skill Development and Certification:** Establishing more comprehensive skill development programs aligned with the current demands of Gulf employers. This includes vocational training in sectors like healthcare, construction, and IT, and ensuring certifications meet international standards. The Indian government has already initiated programs like the Pradhan Mantri Kaushal Vikas Yojana (PMKVY) to enhance skill development. Additionally, NSDC has been actively promoting international mobility by engaging with the GCC countries, including the UAE and the Kingdom of Saudi Arabia, through Government to Government (G2G) and Business to Business (B2B) workforce mobility collaborations. The following G2G and B2B collaborations highlight the types of opportunities available:
- India – UAE Skill Harmonization Program
- Kingdom of Saudi Arabia Skill Harmonization Program
- Establishment of Driving Training Institutes in collaboration with Emirates Driving Institute, UAE
- **Sector-Oriented and Job-Driven** approach is essential to acquire the necessary skills required for employment, particularly for immigrants. The Government of India and other key non-governmental stakeholders should focus on nurturing and developing skills among those who aspire to migrate for an effective and competent workforce. This initiative, conceptualized under the Pravasi Kaushal Vikas Yojana, has yet to undergo an implementation audit. This workforce can then migrate and work in these nations, contributing to India's return on investment.

- **Language and Cultural Training:** Expanding language training programs to include Arabic and enhancing cultural orientation sessions to help migrants adapt better to the Gulf environment. The Ministry of External Affairs (MEA) has been working on pre-departure orientation programs that include cultural training.
- **Health and Welfare Services:** Ensuring access to health and welfare services for migrants, both in the Gulf and upon their return, such as health insurance schemes for overseas workers, such as the Pravasi Bhartiya Bima Yojana (PBBY).
- **Digital Platforms for Migration Management:** Developing and enhancing digital platforms to manage migration processes, provide information, and offer support services.

Case Study: Kerala's Migration to the Gulf

Background:

Kerala has a long history of migration to GCC countries, starting in the 1970s. In 2023, nearly 80% of Kerala's 2.1 million emigrants resided in the Gulf, contributing significantly to the state's prosperity through remittances.

Demography:

As per the 2023 Kerala Migration Survey (KMS), 41.4% of emigrants held degrees, with a sharp contrast between genders: 71.5% of female emigrants had degrees, compared to 34.7% of males. Common occupations included sales and driving for men, while over half of female emigrants worked as nurses.

Key Success Factors:

- Government Support: Kerala's NORKA Department and NORKA-ROOTS help with skills training, certifications, and emergency repatriation.
- Diaspora Networks: Strong community support helps new migrants integrate and find jobs.
- Education: A well-educated workforce allows emigrants to secure higher-paying jobs, especially in healthcare.
- Remittance Infrastructure: Over 80% of remittances come through formal banking channels, boosting Kerala's economy.

Economic and Social Impact:

Remittances account for 23.2% of Kerala's Net State Domestic Product (NSDP) and have improved living standards by funding education, healthcare, and local investments. Migration has also enriched Kerala's cultural landscape, reflected in films and music.

This successful model, bolstered by government initiatives and community support, has significantly transformed Kerala's economy and society.

EUROPE and United Kingdom Europe

Europe and the United Kingdom: A Key Region for Indian Workforce Mobility:

As global mobility trends evolve, Europe has become an increasingly important destination for Indian professionals. With a rich history of economic development, cultural diversity, and robust labour markets, Europe offers a unique blend of opportunities for skilled workers from India. The region's focus on fostering innovation, sustainability, and cutting-edge technologies has enhanced its appeal, making it a natural destination for talent migration. Indian professionals are drawn to Europe not just for its economic opportunities, but also for its quality of life, educational systems, and professional growth prospects. For this report projection in Europe has been taken in consideration with focus on European Union. Separate section has been presented for the United Kingdom owing to large number of immigrations from India.

4.1.1 European Union (EU) and Workforce Mobility:

The European Union (EU) plays a crucial role in shaping the dynamics of workforce mobility within Europe. The EU's collective labour market, which spans 27 member states, provides a wide range of opportunities for skilled migrants, though navigating its complexities can be challenging. The EU has implemented various initiatives aimed at addressing skill shortages and attracting global talent, including from India. The introduction of frameworks, such as the Blue Card Directive, which facilitates the migration of highly-skilled workers, has made the region more accessible for qualified professionals.



In 2020, out of the total migration of **281 million** workers, **30.96% (87 million)** workers migrated to Europe.*

*World Migration Report 2024

The Appeal of Europe for Indian Professionals: Europe's allure for Indian professionals goes beyond mere employment opportunities. The region's strong emphasis on work-life balance, diverse cultural experiences, and advanced infrastructure makes it a favorable destination for long-term migration. Indian migrants in Europe are also supported by vibrant diaspora communities, which facilitate integration and provide a network of professional and social support.

Overall, Europe continues to be a pivotal region in the global mobility landscape, and its importance is expected to grow as demand for skilled talent increases across the continent. Out of the total migration of 281 million workers in 2020, Europe comprised of 30.96% (87 Mn) as per the World Migration Report 2024 issued by UN Migration.

4.1.2 Economic Profile:

The European Union (EU) had a collective GDP of approximately $18.34[68] trillion in 2023. Including non-EU countries like Russia and Turkey (except UK), Europe's GDP was around $23.45[1] trillion.

Europe's economic landscape is characterised by a diverse network of economic corridors and clusters, which enhance trade, innovation, and industrial cooperation across the continent. These corridors, formed through geographic proximity and shared economic goals, play a pivotal role in shaping the economic growth and integration of various European regions. Some of the economic corridors are:

I. Economic Union (Belgium, Netherlands, Luxembourg):

The Benelux region is one of Europe's most integrated economic zones, known for its advanced industries and strong logistical networks.[69] The region serves as a gateway for European trade, with Rotterdam in the Netherlands being one of the largest ports in the world. The economies of Belgium, the Netherlands, and Luxembourg are highly-developed, with strong sectors in finance, logistics, manufacturing, and chemicals. The region benefits from shared policies, open borders, and harmonized regulatory frameworks, which enhance trade and mobility across these countries.

II. Iberian Peninsula (Spain, Portugal):

The Iberian economic corridor is marked by the close cooperation between Spain and Portugal, which benefit from geographic proximity and cultural ties. Both countries have emerged as important players in the renewable energy sector, particularly in solar and wind power. Spain is also an industrial powerhouse, known for its automotive and aerospace[70] industries. The agricultural and tourism sectors remain critical to both economies. Moreover, Portugal's strategic location makes it a growing hub for technology start-ups, particularly in Lisbon.

III. Eastern European Corridor (Poland, Czech Republic, Hungary, Slovakia):

Eastern Europe, particularly the Visegrád Group (Poland, Czech Republic, Slovakia, and Hungary), has seen rapid economic growth over the past two decades. These countries have positioned themselves as manufacturing hubs, particularly for automotive and electronics industries, attracting significant foreign direct investment (FDI) from Western European companies. Poland stands out as the largest economy in this corridor, experiencing growth in sectors like IT, software development, and manufacturing. Additionally, the labour costs in these countries are relatively lower, making them competitive production locations.

IV. Soviet Bloc Economies (Baltic States, Ukraine, Balkans):

Countries in the former Soviet bloc (e.g., Estonia, Latvia, Lithuania, and Ukraine) have transitioned from centrally planned economies to market-oriented systems. The Baltic states—Estonia, Latvia, and Lithuania—have integrated well into the European economy, with Estonia being recognised for its digital economy and innovations in e-governance. Ukraine is an important agricultural producer,[71] particularly for grain and sunflower oil. The Balkans (Serbia, North Macedonia, and others) are emerging as low-cost manufacturing hubs and are seeing increased foreign investments as they work toward greater EU integration.

V. Turkey as a Bridge between Europe and Asia:

Turkey holds a strategic position, acting as a bridge between Europe and Asia. It plays a vital role in connecting European markets with those in the Middle East, Central Asia, and Africa. Turkey's economy is diverse, with strengths in automotive, textiles, electronics, and agriculture.[72] Its Istanbul region serves as a major financial and logistical hub. Turkey has also become a key player in the construction, with many Turkish companies involved in large infrastructure projects in the Middle East and Africa.[73]

VI. Northern Europe (Scandinavia, Baltic Sea Region):

The Nordic countries (Sweden, Norway, Denmark, Finland, and Iceland) are known for their high-levels of social welfare, strong governance, and advanced technology sectors. The region is also a global leader in sustainable energy, with Denmark[74] and Sweden[75] pioneering advancements in wind power and green technologies. Furthermore, the Baltic Sea corridor facilitates trade and energy cooperation between these countries and their Baltic neighbors.

VII. Central and Eastern European Industrial Clusters:

Countries like Romania, Bulgaria, and Croatia have become manufacturing hubs for Western European companies, focusing on industries, such as automotive, aerospace, and IT outsourcing. These countries benefit from competitive labour costs and proximity to major markets in Germany, Austria, and Italy. In recent years, the IT and software development sectors have grown in prominence, with cities like Cluj-Napoca (Romania) and Sofia (Bulgaria) emerging as tech hubs.

VIII. The Alpine Economic Corridor (Austria, Switzerland, Northern Italy):

This region, known for its strong industrial base and high-levels of innovation, is a key contributor to Europe's economic output. Switzerland leads in finance, pharmaceuticals, and precision engineering, while Austria and Northern Italy are hubs for manufacturing and engineering, particularly in automotive, machinery, and luxury goods.[76] The Alpine region also has a strong focus on sustainable development and high-value-added industries, such as biotechnology and advanced materials.

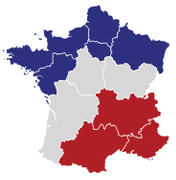
4.1.3 Major Economies basis GDP:

I. **Germany:** Germany is the largest economy in Europe with a GDP of $4.46 trillion.[77] It is a global leader in industrial and technological sectors, with key economic centers in Berlin, Munich, and Frankfurt. Manufacturing contributes to 26.6 per cent of the overall economy with four sectors dominating the economy - the automotive, mechanical engineering, chemical and electrical industry[78] The country has a presence of a diaspora of more than 5.21 lakh[79] Indians, which is second highest in Europe after United Kingdom.

Indian Diaspora in Prominent European Countries



Germany has diaspora of **5.21 lakh+ Indians**
Second highest in Europe, after the UK



France has diaspora of **2.4 lakh+ Indians**



Italy has diaspora of **4.13 lakh+ Indians**



Russia has diaspora of **1.25 lakh Indians**



Spain has diaspora of **1.35 lakh Indians**



Netherlands has diaspora of **4.57 lakh Indians**

II. France: France's economy, with a GDP of $3.03[1] trillion, is driven by the services sector[80] which contributes to two-thirds of the economy followed by manufacturing (Aerospace, Automobiles and Pharmaceuticals) and agriculture. Retail and tourism sectors also contribute to the economy of the country. The country currently has a presence of a diaspora of more than 2.4 lakh[12] Indians.

III. Italy: Italy has a GDP of $2.25[1] trillion, with significant contributions from manufacturing, fashion, and automotive industries. Milan is a notable economic center. Packaged Medicaments, Refined Petroleum, Automobile and equipment and tourism are amongst the largest sectors contributing to the nation's economy. The country has a presence of a diaspora of more than 4.13[12] lakh Indians.

IV. Russia: with a GDP of approximately $2.02[2] trillion is a major player in global energy markets, being one of the largest producers and exporters of oil and natural gas. Key economic centers include Moscow, Saint Petersburg, and Novosibirsk. The industrial sector is a significant part of the economy, with manufacturing contributing around 20% to the GDP. The economy is dominated by the energy sector, heavy machinery, defense, and chemical industries.[81] The country has a presence of 1.25[12] Lakh Indians.

V. Spain: Spain's GDP stands at $1.58[1] trillion, with strong sectors in tourism, manufacturing, and agriculture. Tourism, Manufacturing (Automobile and Pharmaceuticals), Agriculture and Energy sectors are the major contributors[82] to the GDP of the country. The country boasts of a presence of 1.35[12] lakh Indian diaspora.

VI. Netherlands: The Dutch economy, with a GDP of $1.12[1] trillion, is known for its advanced technology, trade, and logistics sectors. Amsterdam and Rotterdam are major economic centers with services sector (80%) being the major contributor to GDP followed by manufacturing (11%), other industrial activity (7%), and agriculture (2%).[83] The country has a presence of 4.57[12] Lakh Indian diaspora, the third highest in Europe. The country-wise GDP and Indian diaspora numbers are enclosed as Annexure 2.

4.2 Migration/Employment Numbers:

The migration of skilled Indian workers to Europe has seen significant growth over the past decade. The International Organization for Migration (IOM) and the UN Migration Report (2023) indicate that Europe is increasingly becoming a destination of choice for skilled Indian migrants.

The Ministry of External Affairs (MEA) reported that over 3.02[12] million Indians reside in continental Europe, with a substantial percentage working in professional and technical sectors. Over 1.83[84] lakh Indians were issued with first residence permits issued in EU Member States in 2022 making it the third highest nationality after Ukraine and Belarus. This was also an increase of 69.4% against the number reported in 2021 (1.08 lakh).

Indian Migration Trends in Europe



3.02 million Indians
reside in continental Europe, primarily working in professional and technical sectors.

1.83 Lakh
first residence permits granted to Indians in EU member states in 2022, making it the third highest nationality after Ukraine and Belarus, showing an increase of 69.4% compared to 2021.

Increase of 69.4%
compared to 2021

Netherlands
France
Germany

Most attractive destinations due to favourable immigration policies and demand for skilled labour

Germany has seen a **20% increase** in Indian migration between 2022 and and 2023, particularly in sectors like IT, engineering, and healthcare.*

*Federal Employment Agency of Germany (BA)

As of 2023, Indian nationals accounted for 23.8% of all EU Blue Cards issued in Europe, highest amongst all nationalities.

Germany, the Netherlands, and France have become some of the most attractive destinations due to favorable immigration policies and a demand for skilled labour. Germany has been a prominent destination, especially after the implementation of its Skilled Immigration Act (2019), which has streamlined immigration for non-EU skilled workers.

Germany has also seen a 20%[85] increase in Indian migration between 2022 and 2023, particularly in sectors like IT, engineering, and healthcare, according to the Federal Employment Agency of Germany (BA). The European Commission's Employment and Social Development in Europe (ESDE) Report 2023 further highlights the increasing demand for Indian professionals, especially in high-tech and healthcare roles.

4.2.1 Free Trade Agreements (FTAs):

The ongoing negotiations between India and the European Union over a Free Trade Agreement (FTA) hold significant potential to enhance skilled migration. These agreements often include provisions on labour mobility, facilitating easier movement of professionals between signatory countries. FTAs can streamline processes related to work permits, recognition of qualifications, and mutual access to job markets. As India continues to engage with the EU on FTA discussions, the inclusion of labour mobility could open new avenues for skilled workers, particularly in high-demand sectors like IT, engineering, and renewable energy, thereby contributing to Europe's economic growth while boosting India's outbound skilled workforce. Some of the key FTA agreements that have been signed with European countries in the last five year with a focus on mobility and migration are as below:

- **India-EU Trade Agreement:**[86] Negotiations between India and the European Union resumed in 2022 after a nearly decade-long pause. The discussions focus on services, including skilled labour mobility, investment protection, and geographical indications. The EU is a key destination for Indian professionals in sectors, such as IT and business services.
- **India-EFTA Trade and Economic Partnership Agreement (TEPA):** Signed in March 2024 with the European Free Trade Association (Iceland, Liechtenstein, Norway, and Switzerland), this agreement seeks to ease labour mobility, especially in services, such as healthcare and engineering, where Indian professionals are in high-demand. This is significant as Switzerland and Norway already host many skilled Indian workers.

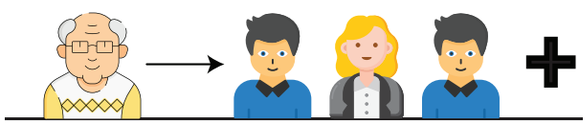
4.3 Key Trends and Factors Driving Growth and Change:

European countries like Switzerland, the Netherlands, and Germany rank highly on INSEAD's 2023 Global Competitiveness Index owing to strong educational systems, robust economies, and innovation-driven policies. Apart from being a favored destination there are several factors that are driving the growth of skilled Indian migration to Europe:

Ageing Workforce: Europe is grappling with a rapidly aging population and a demographic decline. In 2021, the fertility rate across the EU averaged just 1.5[87] births per woman, far below the 2.1 needed to maintain a stable population. This low birth rate, coupled with rising life expectancy, has resulted in an aging population and a shrinking labour force. The European Commission's "The Impact of Demographic Change in a Changing Environment" report stated that as of 2021, there were more than three Europeans of working age for every European aged 65 or over, representing an old age dependency ratio of 32.5%. The report expects that by 2050, about 30% of the European population will be over 65, estimating the old age dependency ratio to be 56.7%.

Europe's Aging Population and Dependency Ratios

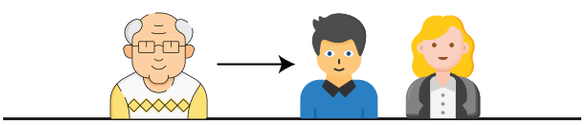
2021 Old Age Dependency



For every European aged 65 or over, there are more than 3 Europeans of working age. The Old Age Dependency Ratio is

32.5%

Projected Old Age Dependency (2050)



By 2050, 30% of Europe's population will be 65 or above. The Old Age Dependency Ratio is expected to be

56.7%

- **Post-COVID Economic Recovery:** The pandemic exposed critical skill shortages in healthcare, logistics, and digital infrastructure. This has prompted many European countries, including Germany and the Netherlands, to relax their visa policies for skilled workers in these sectors.
- **Shifts in Immigration Policies:** The Skilled Immigration Act in Germany and the expansion of the EU Blue Card Scheme have made Europe more accessible to skilled Indian workers. The EU Blue Card is a work and residence permit created to attract highly-skilled non-EU professionals to the European Union. Launched in 2009, it is part of the EU's effort to fill skill shortages in sectors, such as technology, engineering, and healthcare. As of 2023, Indian nationals accounted for 23.8%[88] of all EU Blue Cards issued in Europe, which was the highest amongst all nationalities. The country-wise split of the EU Blue Cards issued is depicted below:

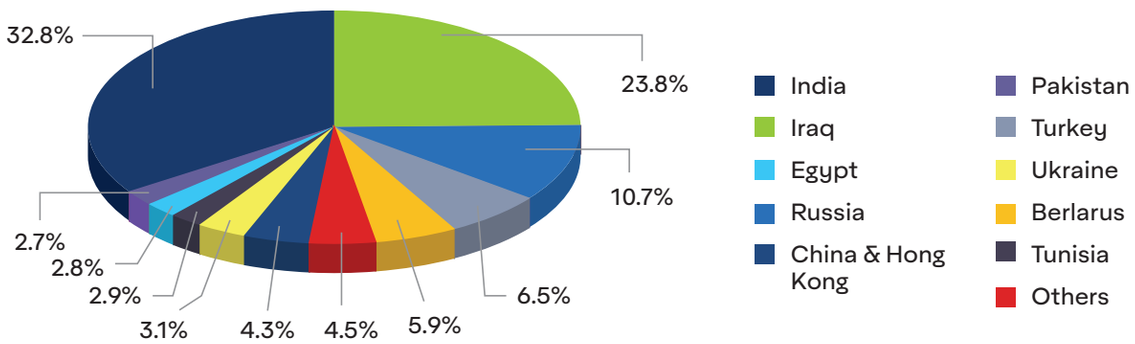


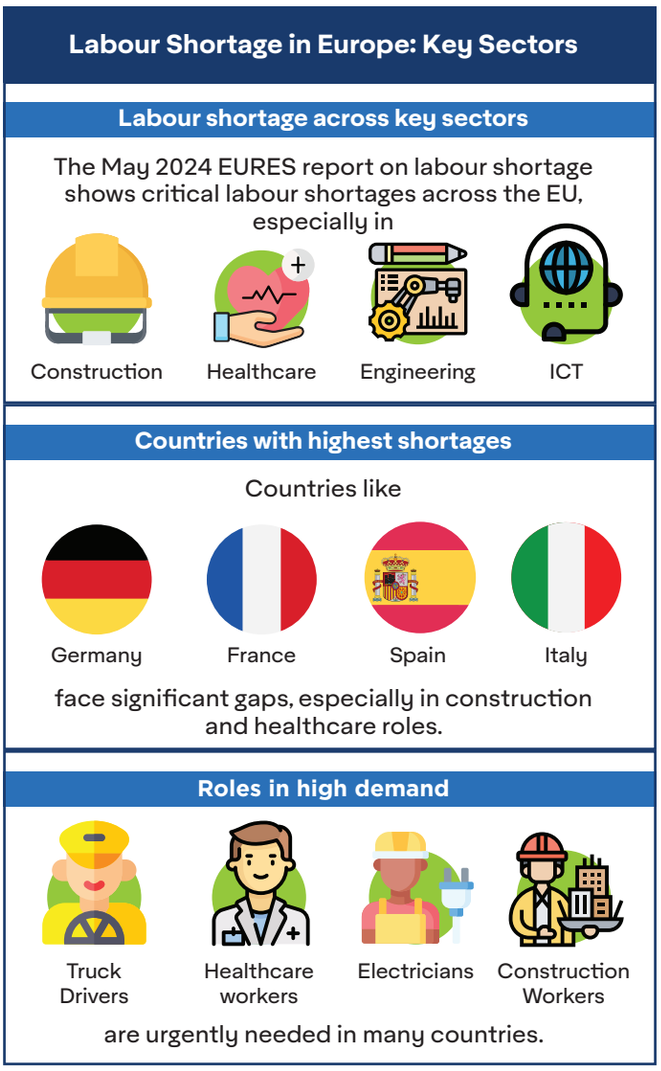
Figure 3: Data on Blue Card Issued by EU Country Wise

- **Emerging Sectors:** Europe's shift toward renewable energy and digital transformation is creating new opportunities. The EU Green Deal and the Digital Decade Strategy aim to boost the labour market, particularly in IT, engineering, and green technologies. These sectors are set to generate millions of new jobs, opening doors for skilled Indian professionals.

4.3.1 Areas of Skill Shortages in Europe:

The latest EURES report on labour shortages in Europe dated May 2024, highlights significant gaps in various sectors across the EU, particularly in construction, healthcare, engineering, and ICT. Several EU countries face acute labour shortages in key roles, such as truck drivers, healthcare professionals (including nurses and doctors), electricians, and construction workers. These shortages are driven by structural shifts in the economy, demographic changes, and the evolving demands of digitalisation and sustainable practices.

Countries, such as Germany, France, Spain, and Italy are among those most affected by these gaps. Labour market shortages are especially notable in the construction and healthcare sectors, where employers are struggling to find skilled workers. For instance, truck drivers and construction workers are in particularly high-demand across multiple countries, with some experiencing severe shortages due to aging workforces and difficulties in attracting new talent. These shortfalls are also exacerbated by mismatches between job seeker preferences and job offers in various locations.



This labour shortfall is affecting economic recovery and competitiveness, with many industries unable to meet current demands for skilled workers. The competition for talent is further intensified by the need to transition toward more sustainable, climate-neutral practices.

The European Labour Authority report identified the following classification of workforce currently in shortfall in the 2023 Report on Labour Shortages and Surplus:

Job Role Name	No. of Countries Facing Shortage in the Job Role
Welders and flame cutters	21
Heavy truck drivers*	19
Motor mechanics	17
Waiters*	17
Cooks	16
Systems analysts	16
Civil engineers	15
Carpenters and joiners	14
Bus and tram divers	13
Butchers, fishmongers, and related food preparers	13
Chefs	13
Roofers*	12
Agricultural mechanics	12
Plumbers, pipefitters	20
Specialist doctors	18
Nursing professionals*	17
Metal, machine setters	17
Electricians*	16
Doctors*	16
Healthcare assistants	15
Software developers	13
Electrical mechanics and fitters*	13
Bricklayers and masons	13
Software workers	12
Early childhood educators	12
Sheet metal workers	12
Application programmers	12
Concrete placers, finishers	12
Air conditioning and refrigeration mechanics*	11
Security guards	11
Plasterers	11
Floor layers, tile setters*	11
Construction*	12
Structural metal preparers	11
Special needs teachers*	11
Spray painters, varnishers	11
Earth moving plant operators	11
Painters and related workers	11

Blue Collar Jobs Technical Jobs Specialised White-Collar Jobs

Table 1: Shortage of Workforce in Sectors Across EU

**Job roles with severe shortfall in the European Countries*

4.4 Key Sectors and Job Roles:

Indian professionals in Europe are primarily employed in the following sectors:

Information Technology: Europe's IT sector is rapidly expanding, with a high-demand for software engineers, data scientists, and AI/machine learning specialists. The European Commission's Digital Economy and Society Index (2023) targets 20 million ICT professionals in Europe by 2030. Indian IT professionals are critical to filling this gap, particularly in Germany and the Netherlands.

Healthcare: Europe's healthcare sector faces significant staff shortages, exacerbated by the pandemic. The World Health Organization (WHO) European Region Report (2023) **projects a shortfall of 4 million healthcare workers by 2030**. Indian doctors, nurses, and medical technicians are in high-demand in countries like Germany and Ireland.

Engineering and Construction: Europe's shift toward sustainable infrastructure is creating a demand for civil engineers, mechanical engineers, and electricians. **The European Construction Industry Federation (2023) forecasts a 10% annual growth in demand for skilled construction workers by 2025,** particularly in sectors like renewable energy and sustainable building.

Renewable Energy: The EU Green Deal is projected to generate 1 million new jobs in the renewable energy sector by 2027. Indian professionals specialising in solar, wind, and energy efficiency technologies are increasingly sought after in countries like Germany, Denmark, and Sweden.

Key Sectors Employing Indian Professionals in Europe

Information Technology

Europe aims for
20 million ICT Professionals
by 2030.



Indian softwares engineers, data scientists and AI, specialists are critical to closing the gap.

Healthcare Sector

WHO projects a shortfall of
4 million healthcare workers
by 2030 in Europe



increasing the demand for Indian doctors, nurses and technicians, especially in countries like Germany and Ireland.

Engineering and Construction

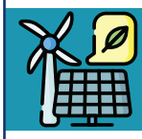
The European Construction Federation forecasts a
10% annual growth
in demand for skilled construction workers by 2025



European countries are looking towards Indian migrants to help meet their green infrastructure demands.

Renewable Energy

The EU Green Deal is expected to create
1 million new jobs
by 2027 in renewable energy sector



Indian professionals are in high demand in Germany, Denmark and Sweden.

Top Skills Required



Eurostat (2022) forecasted a
25%
rise in demand of
data scientists and cybersecurity experts



Global Skills Gap Report (2021) states that
communication and adaptability skills
are crucial for migrants to have



The ILO Future of Work Report (2023) highlights that
green economy roles
are among the fastest-growing in Europe

4.4.1 Top Skills Required in These Job Roles and Emerging Skills:

The key skills in demand for Indian professionals across Europe include:

Technical Skills:

- **IT Sector:** Proficiency in AI/ML, cloud computing, cybersecurity, and data analytics are in high-demand. Eurostat (2022) highlighted the urgent need for data scientists and cybersecurity professionals, forecasting a 25% rise in demand by 2025.
- **Healthcare:** Skills in advanced medical technologies, telemedicine, and elderly care are crucial, especially considering Europe's aging population.
- **Engineering:** Expertise in automation, robotics, and sustainable engineering is becoming essential, especially in renewable energy and green infrastructure projects.

Soft Skills:

- **Cross-Cultural Competence:** Europe's multicultural work environments require strong intercultural communication and adaptability skills. The Global Skills Gap in Europe Report (2021) found that these soft skills are critical for migrant professionals to succeed.
- **Language Skills:** While English is a primary business language in many sectors, knowledge of local languages such as German, Dutch, and French is increasingly important, particularly in healthcare and engineering.

Emerging Skills:

- **Green Skills:** The transition to a green economy is creating demand for skills in sustainability, energy management, and environmental engineering. The ILO Future of Work Report (2023) highlights that green economy roles are among the fastest growing in Europe.
- **Digital Skills:** Skills in AI-powered automation, IoT, and blockchain technologies are critical in IT and engineering roles, driven by Europe's digital transformation strategy.

4.5 Existing Challenges and Forthcoming Challenges to be Addressed:

Despite the favorable migration landscape, several challenges persist:

Language Barriers: Non-English-speaking countries like Germany and the Netherlands require proficiency in their national languages. **The ILO Global Skills Report (2023) emphasizes that language remains a significant barrier for Indian healthcare workers and engineers seeking employment in Europe.**

Recognition of Qualifications: A major challenge is the non-recognition of Indian degrees and certifications. According to the European Migration Network (EMN) Report (2022), many Indian professionals face delays in employment due to the lengthy qualification recognition process, especially in healthcare and technical professions.

Integration and Social Challenges: Cultural adaptation and social integration remain key challenges for Indian migrants. The OECD's Integration of Migrants Report (2021) found that Indian professionals often experience difficulties adjusting to European work cultures, leading to lower job satisfaction and retention.

Public Perception and Political Landscape: Despite the economic necessity of migration, the political climate across many EU member states is increasingly hostile. Rising nationalism and populist movements have framed migration as a threat to national identity and security. Countries like Italy and Greece, which are frontline states for asylum seekers, face disproportionate burdens, leading to calls for reforming the EU's Common Asylum System. Public opposition to migration has also complicated efforts to integrate migrants into the labour market, despite the demand for their skills.

Regulatory Hurdles: While immigration policies have become more favorable, navigating visa and work permit processes can still be complex and time-consuming. The European Parliament's Migration and Mobility Report (2022) calls for further reforms to streamline these processes.

Future challenges could include increased competition from other source countries and evolving labour regulations in Europe that may affect Indian migrants.

Challenges		
 The ILO Global Skills Report (2023) highlights that **language barrier** is significant for Indian job seekers in healthcare and engineering sectors	 The European Migration Network Report (2022) notes employment delays for Indian healthcare and technical professionals due to **lengthy qualification process**	 The OECD's Integration of Migrants Report (2021) states that Indian professionals face difficulty adjusting to **European work cultures**

The European ICT Skills Strategy (2023) underscores the growing importance of AI, cybersecurity and green energy technologies. Hence, Indian institutions need to prioritize advanced training in these skills to meet Europe's rising demand in these sectors.

4.6 Interventions Required to Enhance Global Skills for Indians:

To enhance the employability of Indian professionals in Europe, several interventions are necessary:

Language Training: Collaborations between the Indian Ministry of Skill Development and European institutions could focus on providing language training in German, French, and Dutch, essential for improving employability in non-English-speaking European markets.

Qualification Recognition: Establishing mutual recognition agreements between India and European countries, particularly in sectors like healthcare and engineering, would speed up employment processes. The World Bank's Mutual Recognition Agreement Report (2022) suggests expanding recognition protocols to reduce the burden on professionals migrating to Europe.

Cross-Cultural Training: Training programs that focus on cultural competence and workplace adaptability can help Indian workers integrate more effectively into European workplaces.

Upskilling in Emerging Technologies: Indian institutions should focus on advanced training in AI, cybersecurity, and green energy technologies to align with Europe's growing demand for such skills. The European ICT Skills Strategy (2023) highlights the increasing importance of these skills.

Simplifying Visa Processes: Expanding the scope of the EU Blue Card Scheme and establishing bilateral agreements between India and EU member states could simplify visa processes, making it easier for skilled workers to migrate.

Case Study:

Triple Win Program by GIZ

The Triple Win Program by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and the Federal Employment Agency (BA) exemplifies a successful model for recruiting Indian healthcare professionals to Germany.

Objective: The program addresses Germany's shortage of healthcare professionals by recruiting nurses from India and other countries.

Implementation: Indian nurses undergo B2 level language training, cultural orientation, and skill certification to meet the standards required for German healthcare institutions. The program provides comprehensive support, including visa assistance and job placement.

Impact: As of 2023, the Triple Win Program has placed over 500 Indian nurses in German healthcare facilities. According to GIZ Reports (2023), the program has significantly alleviated staffing shortages, while ensuring ethical recruitment practices.

MOBILITY to United Kingdom

Introduction:

The United Kingdom includes four nations, England, Wales, Scotland, and Northern Ireland. Each nation has its own major cities that contribute to the population and demographics of the United Kingdom. The UK has a high literacy rate of over 99% among residents aged 15 and older. This is attributed to the universal public education provided to UK residents, both in primary and secondary schools.

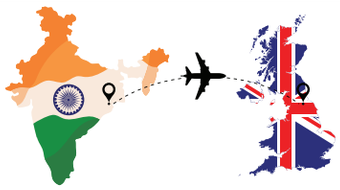
The current population of the United Kingdom is 69,263,077 based on projections of the latest United Nations data. In terms of density, based on the Office of National Statistics findings in 2010, there were 255 people living in every square kilometer of land (660 per square mile), which ranks the territory twelfth in the world overall[89] . In the year leading up to 2024, the median age of the population was 40.6 years, up from 39.7 years in 2010.[90] The population density for the UK in mid-2024 was 285.78 people per square kilometer.[91]

From May 2024–July 2024, the employment rate for those aged 16-64 was 74.8%, while unemployment for those aged 16 and over was 4.1%, indicating a stable job market.[92] This stability drives the need for upskilling and reskilling initiatives to maintain workforce competitiveness, alongside the easing of immigration restrictions to attract skilled workers from various countries for economic stability and social cohesion. Recent economic growth in the UK, marked by a 0.5% increase in GDP and a 1.3% rise in household income in the second quarter of 2024, provides a strong foundation for ongoing Free Trade Agreement (FTA) negotiations with India.[93] A stable and growing economy enhances the UK's bargaining power, allowing it to negotiate more favorable terms in areas like market access and skilled worker mobility. This economic stability also signals to India that the UK is a reliable trade partner, potentially accelerating the finalisation of the FTA and fostering deeper economic ties between the two nations, including migration from India to the UK, particularly in skilled sectors, which would further strengthen both economies through workforce diversification and innovation.

Migration/Employment numbers:

Indian immigration to the UK has evolved significantly over the decades, reflecting broader global migration trends and socio-economic shifts. According to the International Organisation for Migration (IOM) and the UN Migration Report 2023, India remains one of the top countries of origin for migrants due to its demographic dividend and economic opportunities provided by the UK, contributing to the UK's diverse and dynamic demographic landscape.[94]

India: A Leading Source of Migrants to the UK



India remains a top country of origin for migrants, contributing significantly to the UK's diverse demographic landscape.*

*International Organization for Migration (IOM) and the UN Migration Report 2023

As of 2021-22, there are

9,65,000 Indian migrants

in the UK, making up

9%

of the total

As per the data reported by the Ministry of External Affairs (MEA),[95] Government of India, there are approximately 18.6 lakh overseas Indians in the UK, with 14.9 lakh being persons of Indian origin and the remaining classified as NRIs. Furthermore, according to the 2021/22 migration census of the UK, the country saw a significant number of immigrants from India, totaling 965,000, which accounts for 9% of the total immigrant population.[96] In 2023, an additional 2.5 lakh Indian immigrants moved to the UK driven by factors, such as employment opportunities, education, and personal reasons. Among them 127,000 Indians came on work visas, including 39,100 issues for Health & care roles, 115,000 for study and 9,000 for other reasons.[97] This trend highlights the UK's demand for skilled labour, particularly in sectors, such as healthcare, information technology and engineering. It also underscores the importance of FTA negotiations, especially concerning skilled workers' mobility. The UK remains a popular destination for Indian students due to its prestigious universities and diverse academic programs.

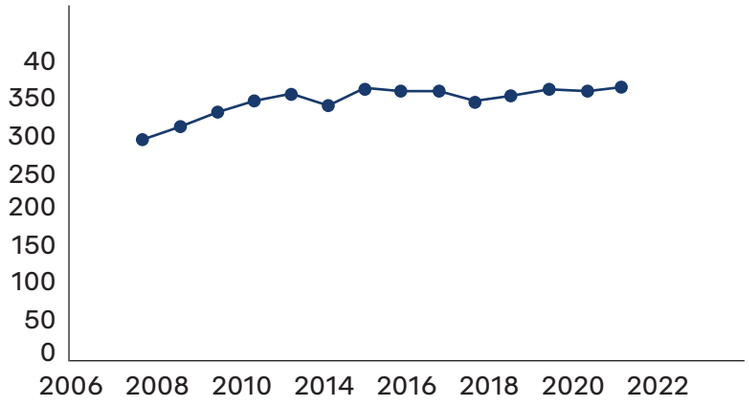


Figure 4: Number of Indian Nationals' Resident in the United Kingdom from 2008 to 2021[98]

5.3 Key Trends and Factors Driving the Growth and Change:

Indian immigration to the UK has been influenced by a variety of trends and factors over the years. Here are some key drivers:

Economic Opportunities: The UK continues to be a major destination for Indian professionals seeking better career prospects. The demand for skilled workers in sectors, such as healthcare, information technology and engineering has been a significant pull factor. The demand for healthcare professionals, including doctors, nurses, and allied health workers, is projected to grow by 18% from 2022-2032.[99] Similarly, engineering remains a critical area with the UK needing to produce 1.8 million more engineers and technicians by 2025 to meet industry demands.[100]

Rising Demands for Skilled Professionals in the UK



The demand for healthcare professionals-including doctors, nurses and allied health workers- is projected to grow by **18%** from 2022-2032.



The UK will need **1.8 million** more engineers and technicians by 2025 to meet industry demands.

Education Aspirations: The UK is home to some of the world's most prestigious universities, making it a popular destination for Indian students.

Post-Brexit Immigration Policies: The UK's immigration policies have undergone significant changes post-Brexit. The introduction of a points-based immigration system has made it easier for skilled workers from non-EU countries, including India, to migrate to the UK. Following are some policies for skilled workers that are designed to attract individuals, who can contribute to the UK's economy by filling skills gaps, particularly in sectors like healthcare, engineering, IT and more.

- **Memorandum of Understanding:** The UK and India signed a Memorandum of Understanding (MoU) on July 21, 2022, to mutually recognize each other's academic qualifications. This system prioritizes skills and qualifications, benefiting many Indian professionals.
- **Skilled Worker Visa:** This visa allows foreign nationals to come to the UK to take up an eligible job offer with an approved UK employer. The visa allows an applicant to stay in the UK for up to 5 years (subject to various terms and conditions placed by the government).[101]

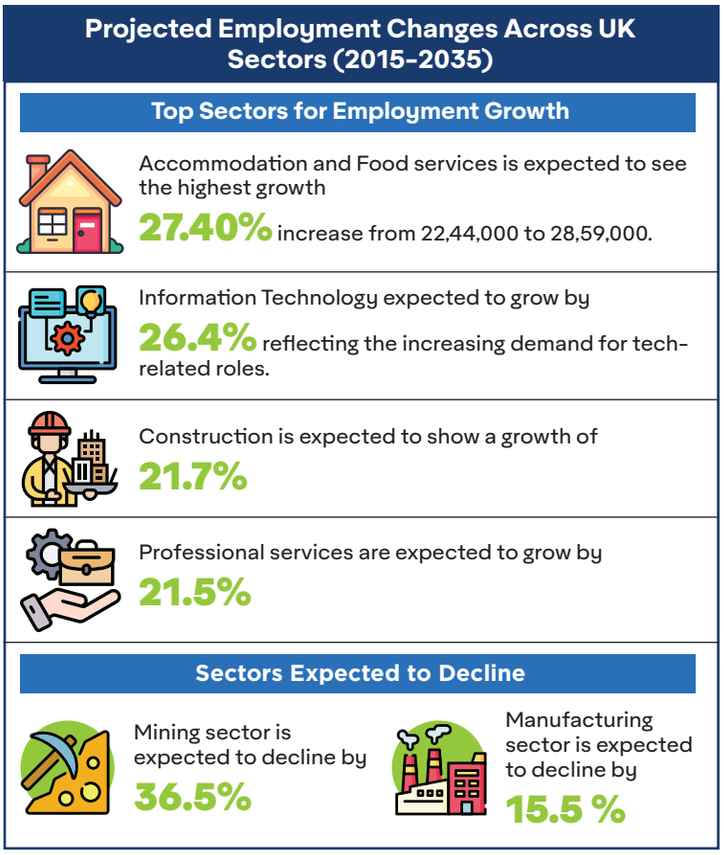
- **Health and Care Worker Visa:** This visa allows medical professionals like doctors, nurses and allied health workers to come to or stay in the UK to do an eligible job with the National Health Service, UK. The visa allows an applicant to stay in the UK for up to 5 years (subject to various terms and conditions placed by the government).[102]
- **Global Talent Visa:** For exceptionally talented individuals in specific fields (e.g., academia or research, digital technology, arts and culture), the Global Talent Visa allows for more flexible working rights. The visa does not require a job offer and allows one to switch jobs or be self-employed.[103]
- **Shortage Occupation List:** Jobs on the UK's shortage occupation list receive priority for visas as they address critical skill shortages.
- **Points-Based Immigration System:** Post-Brexit, the UK has introduced a points-based immigration system that applies equally to European Union (EU) and non-EU citizens. Skilled workers can qualify by meeting salary thresholds and demonstrating English language proficiency. This system simplifies the application process by focusing on skill sets and qualifications rather than nationality.[104]

Cultural and Historical Ties: The longstanding historical and cultural ties between India and the UK also play a role in migration trends. The Indian diaspora in the UK is well-established, providing a supportive community for new immigrants. This sense of familiarity and community can ease the transition for many Indians.

Global Mobility and Connectivity: Advancements in global mobility and connectivity have made it easier for people to move across borders. Improved transportation links and communication technologies have facilitated the movement of Indian talent to the UK, making it more accessible than ever before.[105]

5.4 Key Sectors and Job Roles:

The employment projections for the UK from 2015 to 2035 reveal significant trends across various industry groups. The **Accommodation and Food** sector is expected to see the highest growth, with a 27.4% increase in employment levels, rising from 2,244,000 in 2015 to 2,859,000 in 2035. Similarly, **Information Technology** is projected to grow by 26.4%, reflecting the increasing demand for tech-related roles. The **Construction and Professional Services** sectors also show substantial growth, with increases of 21.7% and 21.5%, respectively. On the other hand, industries like **Mining and Quarrying** and **Rest of Manufacturing** are expected to decline significantly, with decreases of 36.5% and 15.0%, respectively. These trends highlight a shift towards service-oriented and technology-driven industries, while traditional manufacturing and extractive industries are projected to contract.



Levels (000s)	2015	2019	2020	2025	2035
Agriculture	387	396	372	381	385
Mining and quarrying	74	61	62	54	47
Food drink and tobacco	427	453	452	459	449
Engineering	395	403	384	393	349
Rest of manufacturing	1,816	1,831	1,791	1,688	1,543
Electricity and gas	133	144	146	140	139
Water and sewerage	200	223	210	221	237
Construction	2,122	2,334	2,319	2,419	2,583
Wholesale and retail trade	4,971	4,992	4,980	5,007	5,059
Transport and storage	1,609	1,812	1,788	1,904	1,941
Accommodation and food	2,244	2,525	2,416	2,514	2,859
Media	365	380	378	381	386
Information technology	1,025	1,117	1,114	1,198	1,296
Finance and insurance	1,113	1,135	1,150	1,157	1,136
Real estate	568	590	643	619	672
Professional services	2,906	3,212	3,152	3,312	3,532
Support services	2,846	3,012	2,837	3,005	3,214
Public admin. and defense	1,331	1,359	1,403	1,426	1,451
Education	2,956	2,946	2,956	2,997	3,100
Health and social work	4,226	4,410	4,422	4,729	5,078
Arts and entertainment	982	1,029	1,000	1,031	1,119
Other services	962	1,005	1,000	987	992

Table 2: Employment Projection by Industry Group (2015-2035)[106]

Based on the above projection, below are the sectors, which would potentially grow and sectors which are on decline.

Growing Sectors	Declining Sectors
• Health and Social Work: This sector shows significant growth, increasing from 4,226,000 jobs in 2015 to a projected 5,078,000 jobs in 2035. This reflects an aging population and increased demand for healthcare services. • Construction: Jobs in construction are expected to rise from 2,122,000 in 2015 to 2,583,000 in 2035, indicating ongoing infrastructure development and housing projects. • Accommodation and Food Services: This sector is projected to grow from 2,244,000 jobs in 2015 to 2,859,000 jobs in 2035, likely due to increased tourism and hospitality services.	• Mining and Quarrying: Jobs in this sector are expected to decline from 74,000 in 2015 to 47,000 in 2035, reflecting a shift away from traditional energy sources. • Engineering: Employment in engineering is projected to decrease from 395,000 in 2015 to 349,000 in 2035, possibly due to automation and technological advancements. • Manufacturing: This sector shows a decline from 1,816,000 jobs in 2015 to 1,543,000 jobs in 2035, indicating a move towards more automated and efficient manufacturing processes.
Stable or Slightly Growing Sectors	**Skills in Demand**
• Information Technology: Jobs in IT are expected to grow from 1,025,000 in 2015 to 1,296,000 in 2035, highlighting the increasing importance of technology in all aspects of business and daily life. • Professional Services: This sector is projected to grow from 2,906,000 jobs in 2015 to 3,532,000 jobs in 2035, reflecting the demand for specialised skills and expertise. • Education: Employment in education is expected to increase slightly from 2,956,000 in 2015 to 3,100,000 in 2035, indicating steady demand for educational services.	• Digital Literacy: As technology becomes more integrated into various sectors, digital skills will be crucial. • Healthcare Expertise: With the growth in health and social work, skills in medical and caregiving professions will be in high-demand. • Construction and Engineering Skills: Despite some decline in engineering, specialised skills in construction and infrastructure development will be valuable. • Professional and Analytical Skills: The rise in professional services indicates a need for analytical, management, and specialised professional skills.

5.5 Top Skills Required in these Job Roles and Emerging Skills:

As per Standard Occupational Classification (SOC) 2020, the occupation classification has nine major groups, 26 sub-major groups, 104 minor groups and 412-unit groups. Within the broad structure of the classification (major groups and sub-major groups), skills have been categorised into four groups based on qualification, experience and competence required. The summary of each skill level is mentioned below:

- The first skill level equates with the competence associated with a general education, usually acquired by the time a person completes his/her compulsory education and signaled via a satisfactory set of school-leaving examination grades. Competent performance of jobs classified at this level will also involve knowledge of appropriate health and safety regulations and may require short periods of work-related training. Examples of occupations defined at this skill level within the SOC 2020 include postal workers, hotel porters, cleaners, and catering assistants.

- The second skill level covers a large group of occupations, all of which require the knowledge provided via a good general education as for occupations at the first skill level, but which typically have a longer period of work-related training or work experience. Occupations classified at this level include machine operation, driving, caring occupations, retailing, and clerical and secretarial occupations.
- The third skill level applies to occupations that normally require a body of knowledge associated with a period of post-compulsory education but not normally to degree level. Several technical occupations fall into this category, as do a variety of trades occupations and proprietors of small businesses. In the latter case, educational qualifications at sub-degree level or a lengthy period of vocational training may not be a prerequisite for competent performance of tasks, but a significant period of work experience is typical.
- The fourth skill level relates to what are termed "professional" occupations and high-level managerial positions in corporate enterprises, as well as in national or local government. Occupations at this level normally require a degree or equivalent period of relevant work experience.

5.5.1 Key Skills Under Some Important Sectors are Mentioned Below:

Information Technology (IT) and Digital:

- **Programming and Software Development:** Proficiency in languages like Python, Java, and C++.
- **Cybersecurity:** Skills in network security, ethical hacking, and risk management.
- **Data Analysis and Data Science:** Expertise in data interpretation, machine learning, and AI.[107]

Healthcare:

- **Clinical Skills:** Proficiency in patient care, diagnostics, and medical procedures.
- **Healthcare Management:** Skills in healthcare administration, policy, and management.
- **Medical Technology:** Knowledge of medical devices and health informatics.[108]

Engineering:

- **Mechanical and Electrical Engineering:** Skills in design, maintenance, and troubleshooting of mechanical and electrical systems.
- **Civil Engineering:** Expertise in construction, project management, and sustainable practices.
- **Advanced Manufacturing:** Skills in automation, robotics, and precision engineering.[109]

Financial Services:

- **Financial Analysis:** Proficiency in financial modeling, risk management, and investment analysis.
- **Accounting and Auditing:** Skills in financial reporting, compliance, and auditing standards.
- **Fintech:** Knowledge of digital banking, blockchain, and financial technologies.[110]

Education and Research:

- **Teaching and Curriculum Development:** Skills in educational pedagogy, curriculum design, and classroom management.
- **Research and Development:** Expertise in scientific research, data analysis, and academic writing.

  Higher Education Administration: Skills in university administration, policy, and student services.[111]

Creative Industries

- **Digital Content Creation:** Proficiency in graphic design, video production, and multimedia.
- **Marketing and Advertising:** Skills in digital marketing, SEO, and brand management.
- **Arts and Design:** Expertise in visual arts, fashion design, and creative direction.[112]

5.6 Emerging Skill Requirements in the UK:[113]

Technology and IT Skills: Key emerging skills are cloud computing, cybersecurity, and AI. In view of the UK's focus on technology, skills in IT, software development, and data science are essential.

Healthcare: There is a significant demand for healthcare professionals, including doctors, nurses, and allied health workers. Skills in patient care, medical technology, and healthcare management are essential.

Engineering: Skills in various engineering fields, such as civil, mechanical, and electrical engineering, are in demand. Knowledge of sustainable practices and advanced manufacturing techniques are important for the above skills.

Financial Services: Expertise in finance, accounting, and banking is valuable, especially in cities like London. Skills in financial analysis, risk management, and fintech are increasingly important.

Education and Research: There are opportunities in academia and research institutions for those with advanced degrees. Skills in scientific research, academic writing, and teaching are in demand.

Creative Industries: Skills in digital content creation, graphic design, and multimedia are increasingly sought after. Proficiency in software like Adobe Creative Suite and experience in digital marketing are important for the above skills.

Hospitality and Tourism: With the UK's vibrant tourism industry, skills in hospitality management are beneficial. This includes customer service, event planning, and hotel management.

The above sectors not only enhance employability but also help in adapting to the evolving job market in the UK. As per UK labour market survey, current distribution of Indian workers across industries (2022) is depicted below.[114]

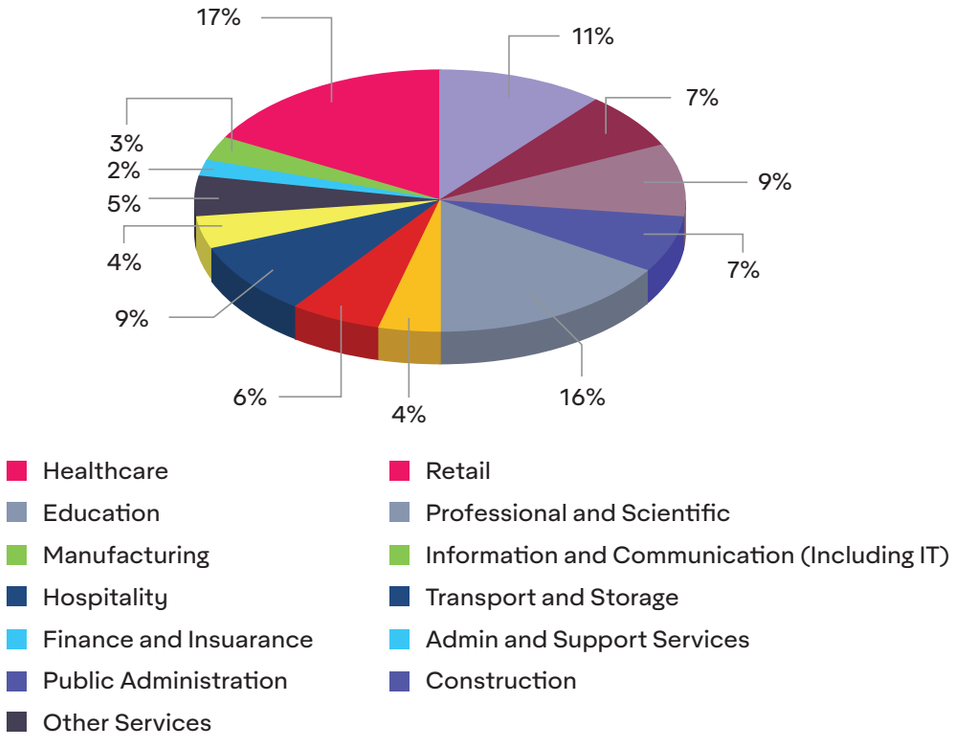


Figure 5: Distribution of Indian Workers Across Industries

As evident by the statistics, majority of the Indian migrants work in healthcare, information, and communication (including IT), and retail industry.

5.7 Existing Challenges and Forthcoming Challenges to be Addressed:

Indian immigration to the UK has been a significant trend, but it comes with its own set of challenges:

5.7.1 Existing Challenges:

Pertaining to Students:

- Recent policy changes have limited the ability of postgraduate students to bring dependents with them. This can create significant emotional and financial strains, especially for those with families.
- The Immigration Health Surcharge has increased from £624 to £1,035 annually.[115] This additional cost can be a substantial financial burden for students.
- While the UK has reintroduced the Graduate Route, which allows students to stay and work for up to two years after graduation, finding a job that meets the visa requirements can still be challenging. The job market is competitive and securing a position that offers the necessary salary and sponsorship can be difficult.

Visa and Immigration Policies:

- The minimum salary requirement for the Skilled Worker visa has increased from £26,200 to £38,700 per annum.[116] This makes it difficult for recent graduates and entry-level professionals to qualify, especially in fields, where starting salaries are lower. Despite the UK's robust job market, meeting the new salary thresholds and securing a job that qualifies for a visa can be challenging. The competition for positions that meet the visa requirements is high.
- The immigration health surcharge, as mentioned earlier, has risen. The additional cost can be a significant financial burden for migrant workers and their families.
- New immigration rules limit the ability of certain visa holders, such as care workers, to bring dependents with them. This can create financial and emotional strains for those with families.[117]

Employment Barriers:

- Many non-EU migrants have lower employment rates than non-migrants, regardless of their qualification level. This scenario is due to the lack of recognition that often prevents these migrants from accessing jobs that utilize their skills effectively.[118]
- Discrimination based on ethnicity and nationality can hinder Indian migrants' employment prospects. Research indicates that ethnic minorities are often less likely to receive positive response from employers compared to their white British counterparts. This disparity reflects systematic biases in hiring practices.[119]

High Cost of Living:

- The cost of living in the UK has risen since 2022. Food and energy prices rose markedly, particularly gas prices, partly in response to the conflict in Ukraine. Global recovery from the coronavirus pandemic put further pressure on prices. In the UK, prices of consumer goods and services rose by 9.6% in the year to October 2022 – the fastest rate in four decades. The housing rental prices also continue to grow at a record high-rate in the UK, rising by 6.2% from January 2023-January 2024.[120] This inflation can affect the quality of life for an average migrant in the UK.

5.7.2 Forthcoming Challenges:

- Increased minimum salary requirement for the Skilled Worker visa will continue to be a significant barrier, especially for recent graduates and entry-level professionals. This could limit opportunities for those in fields with lower starting salaries.
- The limitations on bringing dependents will likely cause ongoing financial and emotional strains for families. This could deter skilled workers and students from choosing the UK as their destination.
- The rising cost of the Immigration Health Surcharge will remain a financial burden, particularly for students and low-income workers. This could make the UK less attractive compared to other countries with lower healthcare costs.
- The UK is transitioning to a fully digital immigration system, replacing physical documents with eVisas by the end of 2024. While this aims to streamline processes, it may pose challenges for those unfamiliar with digital systems or lacking access to necessary technology.

5.8 Interventions Required to Enhance Global Skills for Indians:

To effectively address migration, employability, and mobility for Indian immigration to the UK, several strategic interventions can be taken to equip Indian professionals with the skills and qualifications needed to thrive in the global job market.

Market-Relevant Technical Training and Soft Skills: Implementing training programs that focus on skills in high demand in the UK, such as healthcare, IT, engineering, artificial intelligence, machine learning, and cybersecurity, which are increasingly important in the global job market and finance, in collaboration with Industry experts to meet the current market need.[121]

Recognition of Qualifications: Facilitation of the recognition of each other's higher education qualifications, making it easier for students to pursue further studies or employment in either country in continuation to the Memorandum of Understanding (MoU) between India and the UK on mutual recognition of academic qualifications that was signed on July 21, 2022

Digital and Technological Skills: Before immigration, the government should ensure the assessment of Immigrants for digital literacy to check proficiency on modern technologies and digital tools based on the interest of candidates for which they are applying for immigration.

Partnerships with UK Institutions and Industry with Government Policy Support and Advocacy: Initiatives like the UK-India Education and Research Initiative (UKIERI), the Memorandum of Understanding (MoU) on Mutual Recognition of Qualifications and FTA provisions to encourage joint programs; facilitating research collaborations and boosting Student Mobility to study and gain practical experience in both countries.

These partnerships will create new job opportunities, particularly in sectors like technology, healthcare, and engineering. Additionally, collaborative efforts between education institutions and industries will help in bridging the skill gaps. Programs that align vocational training with industry needs can help Indian migrants acquire the qualifications and skills that are relevant in the UK job market, thereby improving their chances of employment.

Case Study:

of Successful Migration model

The UK has long been a favored destination for Indian immigrants, particularly in the healthcare sector. Indian professionals have been effectively integrated to address skill shortages and improve healthcare services.

Background: The UK's National Health Service (NHS) has faced chronic staff shortages, especially in nursing and specialized medical roles. To address this, the UK government implemented targeted immigration policies to attract skilled healthcare professionals from abroad, including India.

Key Components of the Model		
Targeted Visa Programs	**Health and Care Visa:** Introduced to streamline the process for healthcare professionals to work in the UK. This visa offers reduced fees, faster processing times, and dedicated support.	**Mutual Recognition of Qualifications:** Agreements between the UK and India to recognize medical qualifications, reducing the need for requalification and enabling quicker integration into the workforce.
Partnerships and Recruitment Drives	**Partnerships and Recruitment Drives NHS Recruitment Campaigns:** The NHS has conducted recruitment drives in India, partnering with Indian medical institutions to attract qualified professionals.	**Collaborative Training Programs:** Joint training initiatives between UK and Indian healthcare institutions to ensure that Indian professionals meet UK standards and are well-prepared for their roles.

Outcomes:

Improved Healthcare Services: The influx of skilled Indian healthcare professionals has significantly alleviated staff shortages in the NHS, leading to better patient care and reduced waiting times.

Enhanced Bilateral Relations: The successful integration of Indian professionals has strengthened the bilateral relationship between India and the UK, fostering further collaboration in various sectors.

Economic Benefits: Indian immigrants contribute to the UK economy through their professional work and by filling critical skill gaps, which in turn supports economic growth.

6.2 Background

There is a rapidly growing Indian community in Australia. According to the 2021 census, about 9,76,000 in Australia trace Indian ancestry. The Indian diaspora is the second largest and fastest growing diaspora in Australia. Indian students numbering 1,22,391 (September 2023) form the second largest cohort of foreign-born students in Australia.[122] Migration from India to Australia increased dramatically between 2006 and 2016, more than doubling the numbers of the India-born population. This surge in education-related and skilled migration coincided with a period of significant labour shortages across the economy during Australia's mining boom.[123]

Australia's Rising Demand for Skilled Migration and Economic Growth



Population of India-born migrants in Australia has

Doubled

between 2006 to 2016, driven by education and skilled labour needs during Australia's mining boom.



Australia's economy in 2024, valued at

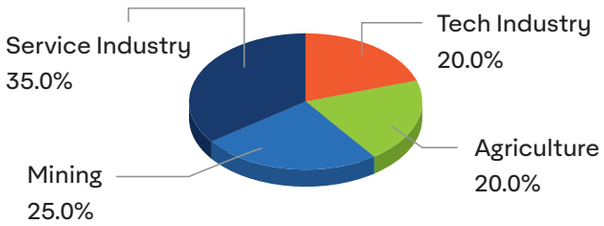
$1.7 trillion +

driven by

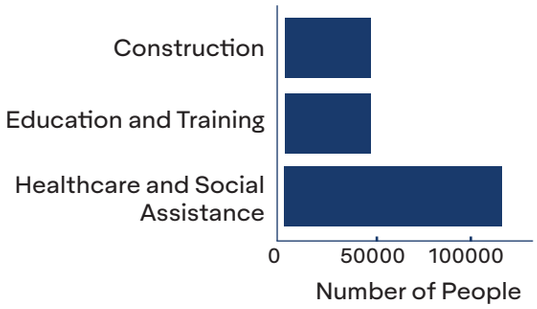


Australia's economy in 2024, valued at over USD 1.7 trillion,[124] continues to thrive, driven by key sectors such as mining, the service industry, agriculture, and the growing tech industry. However, the country faces a significant skill gap, particularly in professional groups like healthcare, construction, engineering and education and training.[125] Victoria University employment projections indicate that national employment will grow by 910,400 people (or 6.5%) from May 2023 to May 2028.

Sector Contribution to Economy in 2024



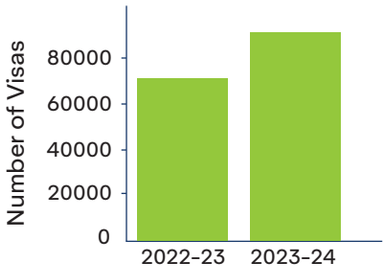
Employment Growth by Industry (May 2023-May 2024)



Employment Growth by Profession (May 2023-May 2024)

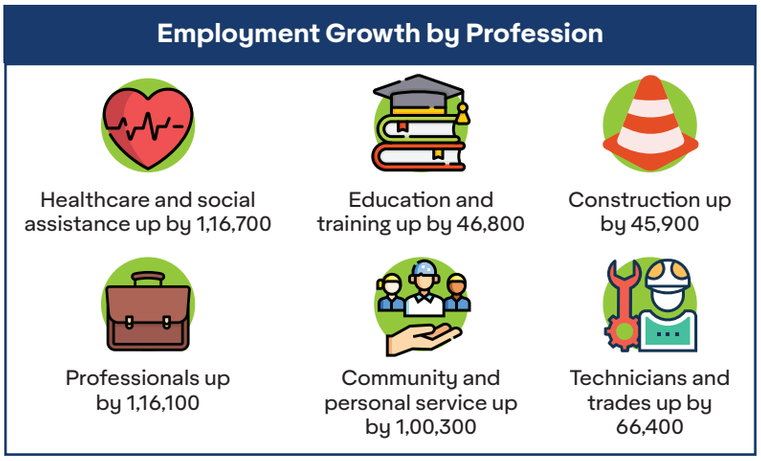


Skilled-in-Demand Visas Granted



Over the 10 years from May 2023 to May 2033, national employment is expected to increase by 1,973,900 people (or 14.2%). In the 12 months leading up to May 2024, employment opportunities and growth varied significantly across industries. The largest increases in trend employment were observed in Healthcare and Social Assistance (up by 116,700), Education and Training (up by 46,800), and Construction (up by 45,900).

Additionally, the most substantial employment growth in trend data occurred among Professionals (up by 116,100), Community and Personal Service Workers (up by 100,300), and Technicians and Trades Workers (up by 66,400).[126] To address labour shortages and fill critical roles, Australia has launched a four-year temporary 'skill-in-demand visa' as a part of the nation's migration strategy.[127] The country has increased its skilled migration intake, granting 91,300 skilled-in-demand visas in 2023-24, showing an increase of 29.7% from 2022-23.[128] Despite these efforts, many sectors still face challenges in finding workers with the right expertise, highlighting the country as an attractive destination for Indian emigrants.



Australia has emerged as a key destination for Indian migrants due to its strong economy, diverse job opportunities, and quality education system. The country offers attractive pathways for skilled workers, students, and families, making it a preferred choice for Indians seeking better living standards and career prospects. Australia's multicultural society also provides a welcoming environment for migrants, allowing them to integrate into its urban hubs, particularly in states like New South Wales and Victoria.

At the end of June 2022, 753,520 Indian-born people were living in Australia, more than twice the number (355,380) at 30 June 2012. After the United Kingdom, the Indian-born population is the second largest migrant community in Australia, equivalent to 9.8% of Australia's overseas-born population and 2.9% of Australia's total population.[129] This marks a significant increase from earlier years, demonstrating the growing migration trend from India to Australia. The steady rise in Indian-born residents highlights the close ties between the two countries, driven by educational migration and skilled labour opportunities in sectors, such as healthcare, construction, education and training and engineering.

6.3 Migration Pattern:

Australia's immigration framework is globally renowned for its emphasis on skilled migration, particularly in addressing labour market shortages. The country attracts talent through various visa programs, with India standing out as a key source of skilled migrants. The migration program is central to Australia's population growth and economic strategy, and its structured visa system continues to support the country's demographic and economic objectives.

In 2022-23, the number of migrant arrivals increased to 737,000, up from 427,000 the year before. This equates to an annual increase of 73 percent. In 2020-21, there was an annual decrease of 71 percent, due to the travel restrictions during the pandemic. With the travel restrictions now lifted, the number of migrant arrivals has surpassed annual numbers recorded pre-pandemic. In the five years prior to the pandemic, the average number of migrant arrivals was 515,000 per year with the majority arriving on temporary visas (307,000). For those who arrived with a permanent visa, the average was 92,000.[130] As of 2023-24, Australia's migration programme allocated 190,000 permanent migration places, out of which 137,100 places were delivered in the skill stream.[131]

India has consistently ranked among the top source countries for permanent migrants in Australia, with over 33% of skilled migration visas in 2023-24 granted to Indian nationals. This trend reflects the strong alignment between Australia's demand for skilled labour and India's vast pool of education and English-speaking professions.

As of 2024, Indians form one of Australia's largest migrant communities, contributing significantly across various sectors. According to the Australian Bureau of Statistics, the Indian-born population in Australia grew from 3,78,480 in 2013 to 8,45,800 in 2023. This represents a growth-rate of nearly 123%, largely driven by skill migration and student visa pathways.[132] This makes India the second-largest source of immigrants after the United Kingdom.

The top three sponsor industries accounted for almost half (46.2 percent) of primary Temporary Resident (Skilled Employment) visas granted in 2022–23. These were Other Services—8830 grants (17.1 percent) followed by Professional Scientific and Technical Services—8552 grants (16.6 percent) and Healthcare and Social Assistance—6466 grants (12.5 percent).[133] Moreover, Indian IT professionals constitute a significant portion of the workforce in Australia's burgeoning tech sector. Roles such as software engineers, cybersecurity specialists, and data scientists are particularly in demand. They have leveraged Australia's Global Talent Visa and Employer-Sponsored Visa programs to meet the demand in these sectors. Furthermore, with Australia facing acute shortages in healthcare professionals, Indian doctors, nurses, and allied health professionals are increasingly migrating to fill critical gaps. The Healthcare and Social Assistance sector, Australia's largest employing industry, continues to absorb a substantial number of Indian professionals.

In the post-pandemic era, Australia's immigration policies have evolved to address economic recovery. The Federal Budget 2024 has set the permanent migration intake to 185,000 places with an approximate 70:30 split between the Skill and Family streams. The 132,000 (70%) places allocated to the skilled stream are intended to address Australia's long-term skill needs.[134] Skilled migration has been prioritised, with an emphasis on sectors that can contribute to technological innovation, infrastructure development, and healthcare – sectors where Indian migrants are well-positioned to play a significant role.

Indian Migration to Australia: A Growing Trend



In 2023-24, over
33%
of skilled visas
were granted to Indians



The Indian-born population in Australia grew from 3,78,480 in 2013 to
8,45,800
in 2013. This is a growth of nearly
123%

46.2%
of primary temporary resident (skilled employment) visa were granted in 3 key industries.



Healthcare and social assistance:
6,466 grants (12.5%)



Professional, Scientific and Technical services:
8,552 grants (16.6%)



Other Services:
8,830 grants (17.1%)

Skilled migration has been prioritised, with an emphasis on sectors that can contribute to technological innovation, infrastructure development, and healthcare–sectors where Indian migrants are well-positioned to play a significant role.

6.3.1 Australia's Immigration Process:

Australia's immigration system is complex, offering multiple pathways for entry based on professional skills, family connections, and humanitarian grounds. Following are the prominent types of visas relevant to Indian migrants:

General Skilled Migration (GSM): This points-based system assesses applicants based on their skills, work experience, English proficiency, and age. GSM visas are ideal for highly skilled individuals who can contribute to sectors, where Australia faces shortages, such as IT, healthcare, and engineering. Indian nationals are particularly successful under the GSM scheme due to their educational qualifications and proficiency in English.

Employer-Sponsored Visas: This visa category allows Australian employers to sponsor skilled workers when local talent is unavailable. The Temporary Skill Shortage (TSS) visa, introduced in 2018, replaced the earlier 457 visa. The TSS visa has two streams: short-term (up to two years) and medium-term (up to four years), with the latter offering a pathway to permanent residency. Indians form a prominent group in this category, filling vital roles in sectors like IT, construction, and healthcare.

Global Talent Visa: Another noteworthy option for high-skilled professionals is the Global Talent Visa program, aimed at attracting the "best and brightest" to fill senior roles in priority sectors such as fintech, MedTech, and renewable energy. In recent years, Indians have been significant applicants under this scheme, particularly in tech-focused industries.

6.3.2 Visa Policy Changes and Their Impact on Immigration:

Australia's visa policies have evolved over time to address labour market needs, economic conditions, and changing migration trends. These policies significantly influence the migration flow between India and Australia, as Indian nationals form one of the largest groups of skilled migrants to Australia. Visa policy adjustments—whether in the form of tightening or relaxation—can have profound effects on the number and type of migrants from India.

Australia's immigration system has always been designed to address its labour market needs, and skilled migration has consistently been a priority. Since the introduction of the General Skilled Migration (GSM) program in the 1990s, Australia has relied on attracting skilled workers to fill shortages in key sectors like technology, healthcare, and construction. Indian professionals, given their educational background and proficiency in English, have historically been well-positioned to take advantage of Australia's skilled migration programs. However, visa policies have shifted significantly in response to global economic conditions and domestic labour market demands. The introduction of the Temporary Skill Shortage (TSS) visa in 2018, replacing the earlier 457 visa, marked one of the most significant changes. The new visa structure focused on ensuring that migrant workers filled only genuine skill gaps in the economy, requiring more rigorous labour market testing and narrowing the list of eligible occupations.

6.3.3 Key Visa Policy Change and Impact:

Recent visa policy changes have significantly impacted Indian migration to Australia, focusing on attracting highly-skilled professionals and addressing post-pandemic economic recovery.

Key Changes:

- **Permanent Migration Cap Increase:** The 2022 Federal Budget raised the cap from 160,000 to 195,000 places, prioritising skilled migration to fill shortages in healthcare, technology, and construction. This has benefited Indian professionals in fields like software engineering, nursing, and medical research.
- **Global Talent Visa (GTV) Expansion:** Designed to attract top talent in digital technologies, advanced manufacturing, and medical sciences, the GTV program has become popular among Indian IT and tech professionals. However, it remains highly competitive.

- **International Education Pathway:** Indian students, a significant group among international students in Australia, benefit from exemptions in the new migration rules due to a trade agreement. The Temporary Graduate Visa (TGV) duration remains longer for Indians compared to other nationals, enhancing their pathway from education to employment and permanent residency.

Skilled Occupation List (SOL): Regularly updated to reflect labour market needs, the SOL ensures that only the most in-demand occupations are filled by migrants. The TSS visa requires employers to prove local unavailability before sponsoring foreign workers, adding complexity but ensuring critical roles are filled. These policy changes have made Australia an attractive destination for Indian migrants, particularly in high-demand sectors.

6.4 Skilled Labour Requirement:

Australia's demand for skilled labour has been a driving force behind its immigration policies, and Indian professionals have become a crucial component of its workforce. With Australia facing shortages in several critical sectors, the country has increasingly turned to skilled migrants, particularly from India, to fill these gaps.

In 2023, 36% of assessed occupations in Australia were in national shortage, up 5 percentage points from 2022. Technicians and Trades Workers faced the highest shortages, with 50% of roles in shortage, especially in Construction and Food Trades. Health Professionals also saw significant shortages, with 48% of roles affected. Community and Personal Service Workers' shortages rose to 24%. High-skilled roles like Sales and Marketing Manager, Taxation Accountant, Biomedical Engineer, and Solicitor were newly in shortage. Gender imbalance exacerbates shortages, particularly in male-dominated and female-dominated occupations.[135]

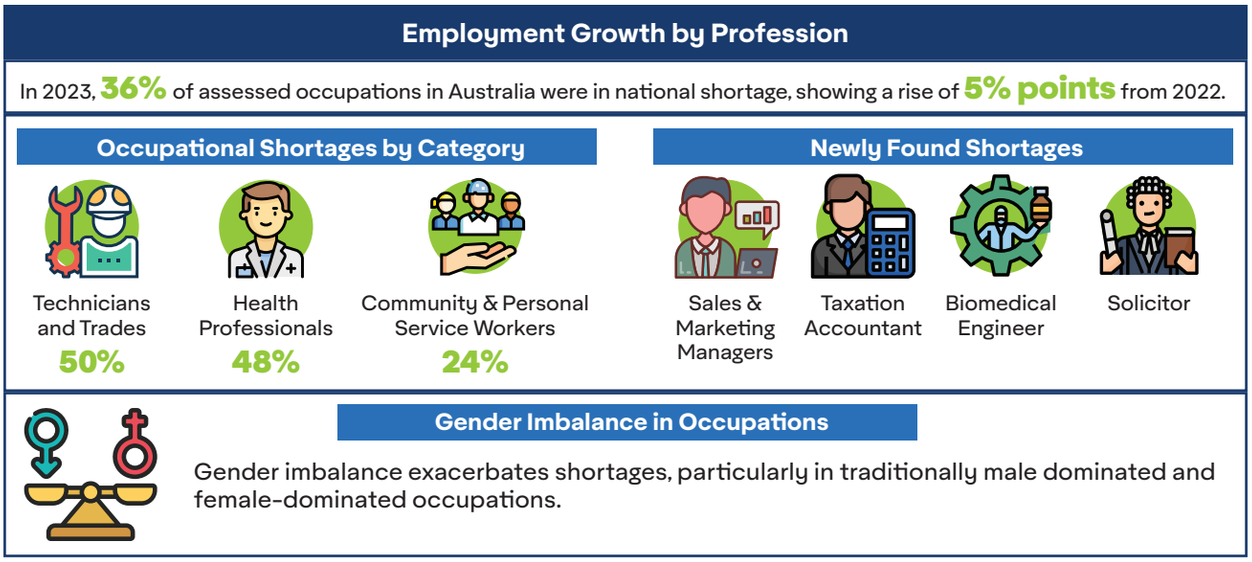
Employment in Australia is projected to grow by 6.5% over the next five years, reaching 14.8 million, and by 14.2% over the next ten years, reaching 15.9 million. The Health Care and Social Assistance sector is expected to see the most significant growth, increasing its share of total employment from 15.2% in 2023 to 16.7% in 2033. Other sectors with substantial growth include Professional, Scientific and Technical Services, and Education and Training. The Manufacturing and Mining sectors are also projected to grow over the next decade.

Classification of Skills Shortage	Top 20 Occupations in Demand
Longer Training Gap Few qualified applicants per vacancy, bachelor degree, Certificate IV or apprenticeship required	• Early Childhood (Pre-primary School) Teachers • Occupational Therapists • Physiotherapists • Registered Nurses • Solicitors • Social Workers • Metal Fitters and Machinists • Electricians
Shorter Training Gap Few qualified applicants per vacancy, Certificate I to III or less required	• Retail Managers
Suitability Gap Many qualified applicants per vacancy, but few suitable applicants per qualified applicant	• Advertising, Public Relations and Sales Managers • Construction Managers • Advertising and Marketing Professionals • Civil Engineering Professionals
Retention Gap Above average job mobility (below average rates of retention), potentially reinforced by low number of total new applicants per vacancy	• Human Resource Professionals • Chefs • Child Carers • Aged and Disabled Carers

Table 2: Top 20 Occupations in Demand by Shortage Type, 2023

Source: Jobs and Skills Australia, Skills Priority List, 2023

Note: There are 3 occupations in the top 20 occupations in demand - General Practitioners and Resident Medical Officers, Software and Applications Programmers, and Motor Mechanics - which are yet to be categorised. Additional analysis required as they may fall in more than one skills shortage category.



6.5 Key Trends and Factors Driving Growth and Change:

The migration of Indian professionals to Australia has evolved significantly over the past few decades, shaped by various factors and trends.

6.5.1 Economic Factors:

Job Availability: Reports from the Department of Home Affairs indicate that skilled migration has been essential in filling gaps in the labour market, particularly in sectors like IT, healthcare, and engineering. The National Skills Commission regularly updates its findings, which show a persistent shortage in key occupations, further incentivizing skilled migration.

Higher Salary Prospects: Indian professionals are attracted to Australia due to the potential for higher salaries and better living standards. Research conducted by The Australian Industry Group reveals that skilled professionals in Australia earn significantly more than their counterparts in India, making the migration decision economically viable for many families.

6.5.2 Educational Aspirations:

International Students: India is the largest source of international students in Australia. According to the Department of Education, nearly 30% of international students in Australia are Indian nationals. Many students choose to study in Australia with the intention of transitioning into the workforce through post-study work visas, as the education system is perceived to provide a strong foundation for career advancement.

Skill Development: The MoU on skills development between India and Australia emphasizes the importance of vocational education and training (VET), which aligns with the increasing demand for skilled labour in Australia. This collaboration facilitates skill development and enhances employability, making Australia an attractive destination for Indian students.

6.5.3 Policy Changes:

Skilled Migration Policies: Australia has tailored its immigration policies to attract skilled workers, with the General Skilled Migration (GSM) program being a significant pathway for Indian professionals. The annual cap on skilled visas has been adjusted to reflect labour market needs, with a specific focus on high-demand occupations.

Comprehensive Economic Cooperation Agreement (CECA): The CECA include provisions to enhance labour mobility, making it easier for Indian professionals to migrate to Australia. The agreement streamlines visa processes and establishes a framework for mutual recognition of qualifications, thereby fostering a more favorable environment for skilled migration.

Mobility Arrangement for Trained Early-professionals Scheme (MATES): On 23rd May 2023, Australia and India entered a Migration and Mobility Partnership Arrangement (MMPA). This bilateral framework supports and promotes two-way migration and mobility between the two nations. Accordingly MATES a novel scheme was launched under this agreement to enable the temporary mobility of Indian university graduates and early career professionals. This scheme facilitates migration for Indian nationals who are younger than or of 30 years of age, have graduated within 2 years from an eligible educational institution at the time of application and holds a bachelor's or higher degree in renewable energy, mining, engineering, ICT, AI, FinTech or AgriTech. The scheme will commence in late 2024 as a pilot program with 3,000 places for primary applicants per program year. The visa allows the participant to spend 24 months in Australia after their entry into the country and can extend their visa by applying under other categories of visas offered by the country.[136]

6.5.4 Free Trade Agreement and its Impact on Immigration:

The Australia-India Comprehensive Economic Cooperation Agreement (CECA) is a pivotal development in the bilateral relationship between the two countries, encompassing trade, investment, and labour mobility. This agreement aims to enhance economic ties, facilitate the flow of goods and services, and promote the movement of skilled labour between India and Australia.
By enhancing labour mobility and simplifying visa processes, the agreement is expected to attract more Indian professionals to Australia, particularly in high-demand sectors. Key implications include:

Easier Access to Work Visas: The agreement is designed to streamline the visa application process for skilled workers, reducing bureaucratic hurdles and wait times. This is especially beneficial for Indian professionals in sectors, where labour shortages are acute.

Increased Job Opportunities: With a mutual recognition framework in place, Indian professionals can expect more job opportunities in Australia, particularly in fields, such as IT, healthcare, engineering, and education. This framework is anticipated to reduce the time and effort required to obtain necessary qualifications and licenses, enabling faster integration into the workforce.

Strengthening Bilateral Ties: Enhanced labour mobility fosters stronger ties between India and Australia, creating a more interconnected relationship. As Indian professionals contribute to Australia's economy, cultural exchange and collaboration between the two nations are likely to deepen, benefiting both societies.

6.5.5 Social and Cultural Factors:

Established Diaspora: With a large and growing Indian community, many migrants find it easier to settle in Australia due to existing social networks. According to the Australian Bureau of Statistics, Indian-born Australians are among the fastest-growing migrant groups in the country.[137] The presence of established communities provides newcomers with social support, making the transition smoother.

Cultural Familiarity: Indian migrants often feel a sense of cultural familiarity in Australia due to the country's multicultural ethos. The celebration of Indian festivals, the availability of Indian cuisine, and the presence of cultural organizations create an inclusive environment that appeals to prospective migrants.

6.6 Key Sectors and Job Roles:

The employment of Indian migrants in Australia is concentrated in several key sectors, reflecting the skills and qualifications they bring with them. The most notable fields include:

Information Technology (IT): A significant proportion of Indian migrants work in IT and related fields, where their expertise in software development, cybersecurity, and data analysis is highly valued. Indian technology giants such as TCS, Infosys, HCL, Wipro, and Tech Mahindra have extensive operations in Australia, employing many members of the Indian diaspora. These companies are pivotal in maintaining IT infrastructure and spearheading digital transformation for major Australian organizations. They are recognized as leaders in technology, leveraging their global expertise to boost productivity. With the growing demand for local tech talent, there is increasing recognition of the Indian diaspora's significant contribution to the Australian economy and its future competitiveness, in addition to the talent pools provided by Indian tech companies.[138] According to the Department of Home Affairs, IT professionals represent one of the highest-demand occupations in Australia, driven by the rapid digital transformation of various industries. As per research conducted by the Australian Computer Society, 90% of all skilled migrants end up finding some form of employment in Australia, out of which 80% take up work in the IT sector.[139]

Healthcare: Healthcare is a critical sector for Indian professionals, especially with the growing ageing population in Australia, as of June 2020, there were approximately 4.2 million Australians aged 65 and over, making up 16% of the total population.[140] This has led to a surge in demand for healthcare workers, including nurses, general practitioners, specialists in geriatrics and mental health. Indian-trained doctors and other healthcare professionals are playing a substantial role in bridging the workforce gap, particularly in metropolitan areas like Sydney and Melbourne. A report from the Australian Health Workforce Ministerial Council highlights the significant contributions of overseas trained professionals, including those from India, in alleviating shortages across various medical fields.[141]

Growing Demand for Healthcare Professionals in Australia



As of June 2020, Australia had **~4.2 million elderly people** (age: 65 or above), making up to **16%** of the total population.

With increase in elderly population, the demands for healthcare services continues to rise in the country.

Indian healthcare Professionals can play a crucial role in supporting Australia's healthcare system.



Opportunities for Indian Engineers in Australia's Infrastructure Boom



Government-funded infrastructure projects are driving engineering construction activity in Australia.

Occupational Shortages by Category

18.8% increase in publicly funded transportation construction work

Record spending of **$30.1 billion** in the twelve months to June 2023.

Forecast peak of **$34.8 billion** in the government-funded transportation work by FY25.

With this surge in investment, Indian engineers have abundant job opportunities in Australia's thriving construction and engineering industries.



Engineering and Construction: Indian engineers have established a strong presence in Australia's engineering and construction sectors, particularly in civil, mechanical, and electrical engineering. Major infrastructure projects, including transportation and renewable energy initiatives, have created a high-demand for skilled engineers. According to the Engineers Australia Report, Indian professionals are increasingly sought after for their project management skills and technical expertise.[142] This demand is driven by Australia's ambitious infrastructure goals, which prioritise innovation and efficiency. Government-funded infrastructure projects

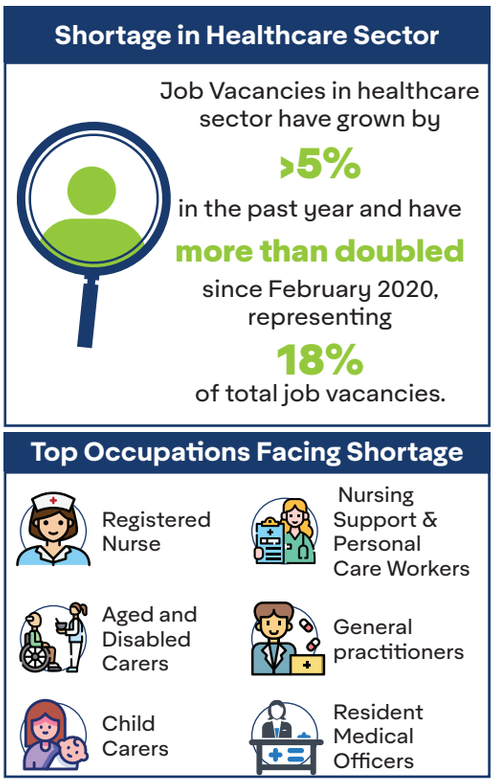
are propelling engineering construction activity, with a substantial 18.8% increase in publicly funded transportation construction work, reaching a record $30.1 billion in the twelve months to June 2023. Forecasts predict a peak of $34.8 billion in government-funded transportation work by FY25.[143] As a result, Indian engineers with expertise in these areas have abundant opportunities for employment and growth in Australia's thriving construction and engineering industries.

6.6.1 Demand for Skill and Job Roles in Australia:

In Australia, the demand for both core and emerging skills is rapidly evolving across key industries:

Health Care and Social Assistance Sector: This is Australia's largest and fastest-growing industry. It encompasses a wide range of services, including medical and care services provided by aged and disabled carers, childcare workers, doctors, nurses, and allied health professionals. Employment in this sector can be community or home-based and spans various locations such as childcare centers, aged care facilities, hospitals, medical centers, pharmacies, and laboratories.

- Over the past year, employment in the Healthcare and Social Assistance has seen significant growth, increasing by 5.9%. This sector now accounts for approximately 15% of total employment, continuing a long-term trend of robust expansion, with employment rising by over 50% in the last decade.
- According to the ABS Job Vacancy Survey, job vacancies in this industry have grown by more than 5% in the past year and have more than doubled since February 2020, representing around 18% of total job vacancies. There are notable skills shortages in several key occupations, including Registered Nurses, Aged and Disabled Carers, Child Carers, Nursing Support and Personal Care Workers, General Practitioners, and Resident Medical Officers.[144]



Education and Training sector: This encompasses teaching and training across all levels, from pre-school to secondary school, higher education, vocational education and training, adult and community education, and private tutoring. Most professionals in this sector are teachers, lecturers, trainers, or instructors, while a smaller group provides educational support services, such as education aides, career counselors, and laboratory technicians.Over the past year, employment in the Education and Training sector has increased by 4.9%, now representing over 8% of total employment. This growth aligns with a long-term trend, with employment in this sector rising by more than 30% over the past decade.

According to the ABS Job Vacancy Survey, job vacancies in this industry have surged by more than 25% in the past year and have more than doubled since February 2020, accounting for around 4% of total job vacancies. There are significant skills shortages in several key occupations, including Early Childhood (Pre-primary School) Teachers, Primary School Teachers, Secondary School Teachers, and Vocational Education Teachers.[145]

Construction sector: This is also one of Australia's largest industries, encompassing the planning and building of various structures, from homes and hospitals to office buildings, roads, bridges, and renewable energy infrastructure. It also includes demolition and earthworks. Most workers in this industry are engaged in building or transport infrastructure projects.
Employment growth in the Construction sector is cyclical, characterised by periods of significant growth followed by declines. Over the past year, employment in this industry has increased by 9.3%, now accounting for more than 9% of total employment. Over the past decade, the sector has experienced substantial growth, with employment rising by over 30%.
According to the ABS Job Vacancy Survey, job vacancies in this industry have decreased by 17% over the past year but remain nearly double their level from February 2020, representing around 8% of total job vacancies. There are notable skills shortages in several key occupations, including Carpenters and Joiners, Electricians, Construction Managers, Plumbers, and Painting Trades Workers.

Manufacturing (Engineering) sector: The sector employs a significant number of individuals and encompasses the production of various goods, including food and beverages, clean energy, clothing and footwear, medicine, minerals and metals, and machinery and equipment. The industry is advancing towards a digital future, creating new career opportunities in specialised processes and involving the latest technologies and manufacturing techniques.

- Over the past year, employment in the Manufacturing sector has increased by 5.6%, now representing around 6% of total employment. However, this sector has generally experienced a long-term decline in employment. Despite recent growth, current employment levels remain below those of a decade ago.
- According to the ABS Job Vacancy Survey, job vacancies in this industry have decreased by just over 20% in the past year but are still more than 80% higher than their level in February 2020. This sector accounts for around 5% of total job vacancies. There are significant skills shortages in key occupations, including Structural Steel and Welding Trades Workers and Metal Fitters and Machinists.

Professional, Scientific and Technical Services: The primary service offered by this industry is specialized professional, scientific, and technical expertise, which adds value to other businesses and individuals outside the sector. Employment in this industry includes roles in scientific research, architecture, engineering, computer systems design, law, accountancy, advertising, market research, management consultancy, veterinary science, and professional photography.

Over the past year, employment in this sector has grown by 4.9%, now accounting for more than 9% of total employment. This growth is part of a long-term trend, with employment increasing by over 40% in the past decade. According to the ABS Job Vacancy Survey, job vacancies in this industry have risen by around 4% in the past year and by nearly 70% since February 2020. This sector now represents approximately 11% of total job vacancies. There are significant skills shortages in key occupations, including Software and Applications Programmers, Advertising and Marketing Professionals, and Solicitors.

6.7 Existing and Forthcoming Challenges to be Addressed:

Despite the growing contributions of Indian migrants to Australia, several significant challenges impede their integration and professional success. These challenges arise from systemic, social, and economic factors and require targeted interventions to enhance the migration experience.

Recognition of Qualifications and Skills: One of the most pressing challenges for Indian migrants is the recognition of their educational qualifications and professional skills.

- **Credential Assessment Barriers:** Many Indian professionals encounter difficulties in having their qualifications recognised by Australian authorities, leading to underemployment or unemployment. The Department of Home Affairs outlines that various professions require specific qualifications to be acknowledged by relevant professional bodies, and inconsistencies in the assessment processes can hinder employment opportunities.

- **Economic Impact:** A report by the Committee for Economic Development of Australia (CEDA) found that nearly a quarter of permanent skilled migrants work in jobs beneath their skill level.[146] This misalignment not only affects the migrants' economic status but also results in a loss of potential productivity for the Australian economy, creating inefficiencies.

Cultural Integration and Social Acceptance: Cultural integration poses significant challenges for many Indian migrants, particularly those who are new to Australia.

- **Cultural Differences:** Indian migrants may struggle to adapt to Australian workplace culture, which often emphasizes direct communication and collaboration.

- **Social Isolation:** Despite a sizable Indian community in Australia, newcomers may feel isolated if they do not have existing social networks. Strengthening community support systems and encouraging engagement in local activities can help migrants build connections and foster a sense of belonging.

Visa Regulations and Immigration Policies: The complexity and unpredictability of visa regulations significantly impact Indian migrants.

- **Frequent Policy Changes:** Changes in immigration policies can create uncertainty for prospective migrants. The Migration Institute of Australia notes that frequent adjustments to visa categories and quotas may discourage skilled professionals from pursuing opportunities in Australia. Below are examples of a few:

  Migration Program Changes (July 2024): Starting from July 1, 2024, Australia implemented significant changes to its migration program. These include adjustments to employer-sponsored and skilled visa categories, increased visa application charges, and stricter compliance requirements for employers.[147]

  New Bilateral Migration Deal: Australia and India signed a new migration deal aimed at boosting labour mobility. This includes a pilot scheme offering 3,000 places annually for early-career professionals from India to work in Australia on a two-year visa without sponsorship.[148]

  Tighter Student Visa Rules: The Australian government has tightened visa rules for international students, including higher financial requirements and restrictions on applying for subsequent student visas while onshore.[149]

- **Long Processing Times:** Prolonged processing times for visa applications can deter skilled professionals, especially those in high-demand occupations. The Department of Home Affairs has acknowledged that these delays can create barriers for migrants who wish to settle and contribute to the economy.

Evolving Labour Market Needs: The rapid evolution of the Australian labour market poses ongoing challenges for Indian migrants seeking to remain competitive.

- **Skills Obsolescence:** As industries undergo technological transformations, some skills may become outdated, while new ones emerge. Continuous professional development and upskilling are essential for Indian migrants to adapt to these changes. The Australian National Skills Commission emphasizes the need for ongoing training programs to keep pace with industry demands. For instance, the 2021 State of Australia's Skills report discusses the need for resilience in the education and skills system to adapt to future economic needs.[150] Additionally, the 2022 report on Australia's current, emerging, and future workforce skills needs also emphasizes the necessity of continuous training to address skill shortages and evolving industry requirements.[151]

- **Demand for Soft Skills:** Employers increasingly value soft skills, including communication and teamwork, in addition to technical expertise. Indian migrants may need to focus on developing these competencies to enhance their employability.
- **Ageing Population:** Demographic change is a key driver of labour supply and can greatly affect the size and shape of the workforce. Population ageing, through a long-term decline in fertility rates and rising longevity, is a global trend amongst most of the advanced economies, including Australia, and will place downward pressure on labour supply as older workers retire.15 That said, a relatively high net migration rate and increasing participation by females and older cohorts have helped mitigate the impact of ageing on the labour market, to a certain extent in Australia. Nevertheless, Australia's population is expected to continue to age over the next 40 years, while the share of the working age population is projected to fall. Treasury's 2023 Intergenerational Report estimates that the proportion of the population aged 65 and over will rise from 17% in 2022-23 to 23% by 2062-63. Concurrently, the share of the working-age population is projected to decline from 65% to 61% over the same period.[152]

6.8 Interventions Required to Enhance Global Skills for Indians:

To maximize the potential of Indian migrants in the Australian workforce and ensure their successful integration, a range of targeted interventions is essential. These interventions must focus on enhancing skills development, improving employability, facilitating cultural integration, and addressing systemic barriers. This section outlines key strategies that stakeholders can adopt to create a more conducive environment for Indian professionals in Australia.

Comprehensive Skills Development Programs: A robust skills development framework tailored for Indian migrants is crucial for enhancing employability and aligning skills with market demands.

- **Vocational Education and Training:** Strengthening collaborations between Indian and Australian vocational education institutions can create programs that specifically address skill gaps in critical sectors. The Australian Skills Quality Authority (ASQA) highlights the importance of VET in meeting national workforce needs, and tailored training can enhance the employability of Indian migrants in high-demand occupations like IT, healthcare, and engineering.

Language and Communication Skills Enhancement: Effective communication is a vital component of workplace success, necessitating targeted interventions to improve language proficiency among Indian migrants.

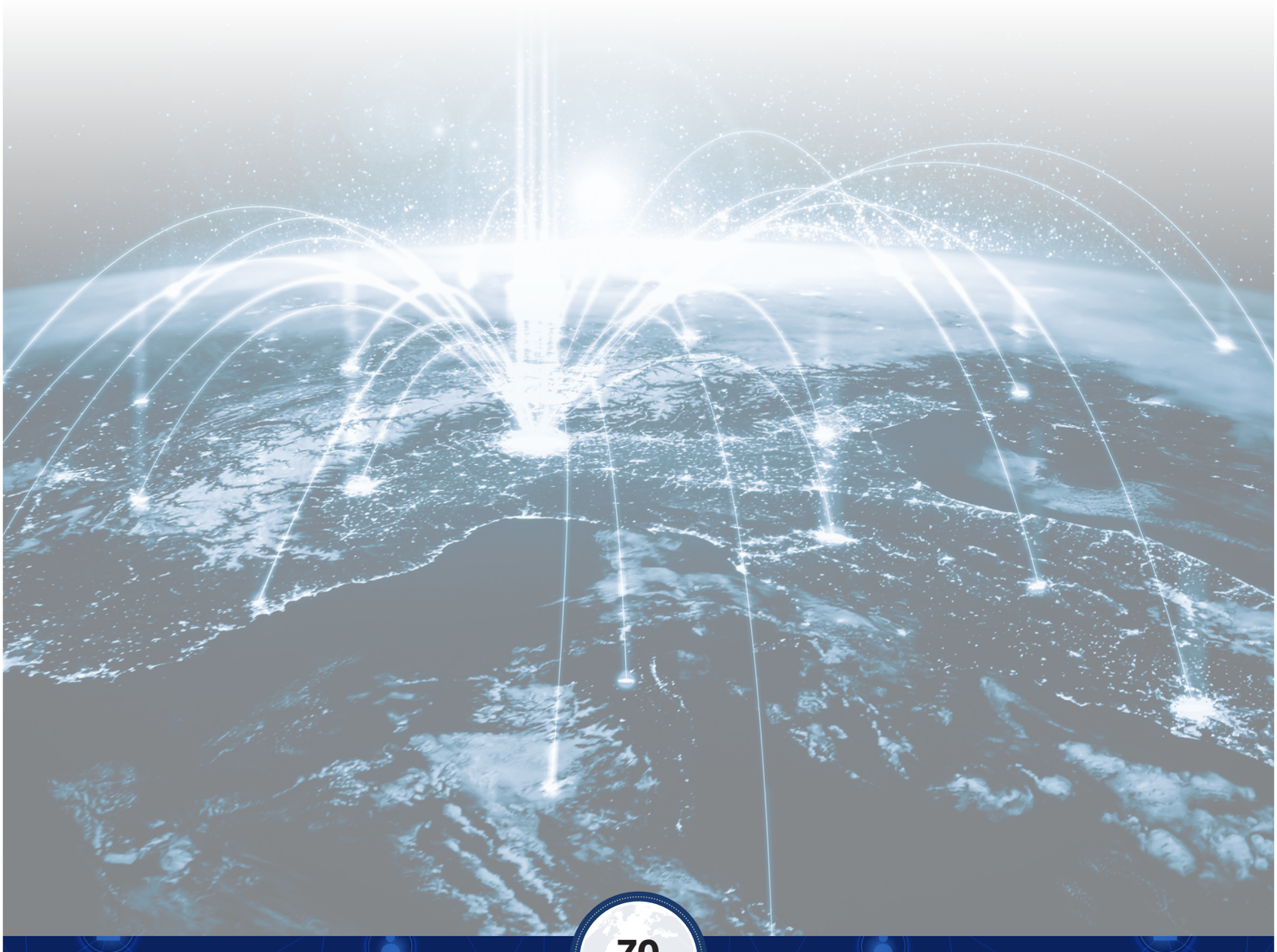
- **Language Training Programs:** Expanding programs like the Adult Migrant English Program (AMEP) can help new migrants enhance their English language skills. Providing additional resources focused on business communication and workplace language can empower migrants to integrate more effectively into the workforce.
- **Cultural Competency Workshops:** Integrating cultural competency training within language programs can help migrants understand Australian workplace culture, including communication styles and professional etiquette. Such training can also foster better interactions between migrants and their colleagues.

Supportive Community Networks: Building strong community networks can significantly ease the transition for Indian migrants and provide ongoing support.

- **Mentorship Programs:** Establishing mentorship initiatives that connect Indian migrants with established professionals in their fields can provide invaluable guidance and support. Organizations like SBS and various Indian community groups can facilitate these connections, helping migrants navigate the job market and workplace culture.
- **Community Engagement Activities:** Encouraging participation in local community events can help migrants build social networks, fostering a sense of belonging. Community organizations should be empowered to create and promote such events, enhancing cultural exchange and integration.

Policy Advocacy and Stability: Advocating for stable and transparent immigration policies is essential to create a favorable environment for skilled migrants.

- **Clear Immigration Pathways:** Stable and clearly communicated immigration policies help prospective migrants navigate the system. Multicultural Australia advocates for transparent and timely pathways to permanent residency and citizenship, emphasizing the need to prevent migrants from remaining in a 'permanently temporary' status. Visa uncertainty negatively impacts refugees on Temporary Protection Visas (TPVs) and Safe Haven Enterprise Visas (SHEVs), who cannot safely return home. Clear pathways to permanent residency are crucial for building social connections and fostering a sense of belonging. Australia's migration program should prioritize humanitarian obligations, offering permanent protection and citizenship to genuine refugees and supporting their right to family formation.[153]
- **Collaboration with Industry:** Establishing partnerships between government agencies, educational institutions, and industry stakeholders can help identify skills in demand and create training programs aligned with those needs. Collaborative efforts can lead to the development of targeted training initiatives that prepare migrants for specific roles.



RECOMMENDATION and Way Forward

India's unique position in terms of its demographic dividend and young population enables it to significantly contribute to the global community's efforts in developing an effective world migration strategy. As an influential emerging economy, it is crucial for India to articulate a comprehensive worldview on migration, preparing for the future and enhancing its role on the international stage.

In recent times, India has urged acknowledging the historical roots of underdevelopment, advocating for collaboration in line with SDG 17 on Global Partnership for Sustainable Development. Focus is being drawn towards the multi-directional nature of migration, challenging the oversimplified view of migration as merely flowing from developing to developed countries and showcasing its complexity influenced by globalization. India is dedicated to establishing regular migration and mobility channels while advocating for improved social security benefits for its diaspora which is also reflected in multiple bi-lateral and FTA agreements. India has been expanding the scope of its migrant welfare policies in destination countries and emphasizing on comprehensive skills development. As India aims to meet global labour demands with its growing young population, the government may look at prioritizing policies that enhance mobility over traditional migration. Expanding legal channels for labour mobility could potentially increase the incomes of citizens from developing countries as well as those of the host country. These gains highlight labour mobility as one of the most effective tools for poverty alleviation on the current development agenda.

The ageing demography of the developed world has created a great opportunity for India to eliminate its poverty and enhance the quality of life for a vast number of Indians in a single generation. The developed world's deficit of physical skills - from healthcare workers and coders to infrastructure builders - can be filled in the next 50 years by India. Circular migration, with government-to-government agreements to safeguard wages and social security of migrant workers in destination countries, is a win-win option.[154]

In the context of the countries analysed in this paper below are the specific recommendations to push for greater migration and mobility across the globe for both skilled and semi-skilled workers, India could focus on several key strategies:

Bilateral and Multilateral Agreements:

Labour Mobility Partnerships (LMPs): India can engage in bilateral agreements with countries that face labour shortages, particularly in sectors like healthcare, IT, construction, and manufacturing. Countries such as the UAE, UK, Germany, and Australia already have a demand for both skilled and semi-skilled workers.

Skill Recognition Agreements: Aligning Indian certifications and vocational training standards with international norms can ease the migration of semi-skilled workers. This can involve mutual recognition of qualifications through agreements with foreign governments.

Skilling and Upskilling Programs:

Targeted Training for Global Standards: Skill development initiatives need to align with the specific needs of destination countries. India can enhance skilling initiatives to meet the requirements of countries with labour shortages, like the construction industry in GCC countries or healthcare in Europe.

Language and Cultural Training: Programs should include language skills and cultural training to help migrants adapt better to foreign environments, making Indian workers more attractive to global employers.

Building a Stronger Migration Framework:

Improving Migration Governance: India can strengthen institutions like the Ministry of External Affairs and the Ministry of Skill Development to streamline migration processes and ensure better protection of migrant rights abroad.

Digital Platforms for Global Job Matching: Develop government-backed platforms that connect Indian workers with global employers, providing end-to-end support in job matching, visa processes, and skills assessments. This would also remove the possibility of fake recruitment.

Focus on Emerging Sectors:

Green Energy and Technology: India can build expertise in emerging fields like renewable energy, AI, cybersecurity, and digital technologies. Given India's renewable energy initiatives, this sector can become a focus for both skilled and semi-skilled workforce exports to countries like Germany, Australia and GCC countries.

Healthcare and Caregiving: With an aging population in many developed countries, India could focus on skilling semi-skilled workers for healthcare, caregiving, and support roles, which are in high-demand in Europe and the UK.

Creating Safe Migration Pathways:

Protection Mechanisms: Strengthening migrant welfare programs and offering pre-departure orientation and support systems to ensure migrant safety and reduce exploitation abroad.

Portable Benefits Schemes: India can collaborate with host countries to ensure social security benefits are portable, allowing Indian workers to transfer pensions or benefits earned abroad back to India.

Leveraging Diaspora Networks:

Engaging Indian Diaspora: The Indian diaspora, especially in tech and healthcare, can be a valuable resource in mentoring new migrants, advocating for immigration reforms, and creating employment opportunities for skilled and semi-skilled workers.

Soft Diplomacy: Mobilising Indian business leaders and diaspora influencers can help advocate for smoother migration policies and foster goodwill in host countries.

Policy Advocacy and Diplomatic Engagement:

Advocating for Greater Mobility with International Organizations: India can work with international organizations like the ILO, IOM, and WTO to push for frameworks that promote skill mobility and fair migration practices.

Targeted Diplomacy: Using strategic diplomacy to lobby for easier visa regimes and work permits in key markets like Europe, Australia, and the GCC.

Promoting Circular Migration and Mobility:

Temporary and Circular Migration Programs: Encourage temporary migration programs that allow workers to gain skills abroad and return to India, benefiting both the home and host countries. This could particularly benefit industries like agriculture and construction in host countries.

Below is a matrix giving an overview of Stakeholders, their roles and responsibility and action which can be taken by them to promote skilled workforce migration and mobility.

Stakeholder	Role/ Responsibility	Specific Actions
Ministry of External Affairs (MEA)	Oversee international cooperation, labour mobility policies, and bilateral agreements	• Negotiate bilateral labour agreements (e.g., India-EU, India-GCC) to ease skilled worker migration • Manage G2G agreements ensuring fair treatment and worker protections
Ministry of Skill Development and Entrepreneurship (MSDE)	Develop and implement skill development initiatives to meet global standards	• Create vocational and language training programs aligned with global demand in sectors like IT, healthcare, and construction • Expand certification programs to match international requirements, e.g., EU Blue Card criteria
National Skill Development Corporation (NSDC)	Lead in delivering vocational training, skilling initiatives, and upskilling programs	• Develop sector-specific training in high-demand areas (e.g., AI, green energy, healthcare) • Collaborate with international institutions to provide certifications recognized globally
State Governments (e.g., Uttar Pradesh, Bihar, Kerala, Tamil Nadu)	Enhance migration facilitation for low-skilled and semi-skilled labour	• Strengthen regulation of recruitment agencies to prevent exploitation of workers • Implement skill training programs aligned with GCC demands, focusing on construction and infrastructure
Ministry of Labour and Employment (MoLE)	Regulate employment terms, protect workers' rights, and ensure labour welfare	• Monitor recruitment practices and implement mechanisms to protect migrant workers in coordination with GCC countries • Address complaints and ensure justice for workers experiencing exploitation

Stakeholder	Role/ Responsibility	Specific Actions
Indian Embassies and Consulates	Provide on-ground support to Indian migrants abroad	• Assist in visa processing, legal aid, and addressing workers' grievances abroad • Facilitate safe repatriation in case of disputes or emergencies
Ministry of Education	Lead efforts in mutual recognition of qualifications and enhancing educational exchange	• Negotiate agreements with European countries for mutual recognition of educational and professional qualifications • Promote international collaborations in higher education to strengthen global workforce readiness
Industry Associations (e.g., FICCI)	Collaborate with government to ensure industry needs align with skilled migration policies	• Identify current and future skill demands, especially in IT, renewable energy, and healthcare • Advocate for streamlined migration and mobility pathways
Private Sector (Corporate Employers)	Recruit and support skilled Indian professionals in global markets	• Partner with skilling institutions for customized training programs • Ensure transparent recruitment processes and offer competitive benefits to attract talent
International Organizations (e.g., IOM, ILO)	Provide guidance and ensure compliance with international labour standards	• Facilitate discussions on international labour rights, mobility, and ensure protections for migrant workers • Provide technical assistance to enhance labour migration systems

Table 3: Responsibility Matrix

ANNEXURE 1 Country Wise Emerging Skills

GCC Countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates)

Industry	Required Skills	Emerging Skills
Construction and Infrastructure	• Civil structural engineering • Mechanical engineering • Project management • Health, Safety and Environment (HSE) Knowledge	• Smart City Planning • IoT Integration • Sustainable construction techniques • LEED certification • Renewable energy solutions for buildings • Digital construction technologies like Building Information Modeling, use of drones and AI for site management and inspection
Oil and Gas	• Technical expertise in drilling, refining and petrochemical processes • Project Management • Health, Safety and Environment (HSE) Knowledge	• Renewable Energy Integration like Hybrid energy solutions and clean energy management • AI • Predictive analytics • Digital twins technology • Carbon management practices • Sustainable extraction practices
Hospitality and Service Industry	• Multilingual and multicultural skills • Strong communication skills in English, Arabic and other languages • Customer service excellence • Hotel Management • Event management • Organizational skills	• Eco-friendly tourism • Green hotel management • Sustainable tourism operations • Cultural tourism Management
Healthcare	• Cardiology • Oncology • Neurosurgery • Proficiency in using Electronic Medical Records (EMR) and other digital tools • Knowledge of GCC health regulations and healthcare standards	• Telemedicine and digital healthcare • Remote diagnosis • AI-driven diagnostic tools • Robotic surgeries • Smart healthcare systems • Health data analytics
Retail and Trade	• Sales and marketing techniques • Global supply chain and logistics	• Online retail • E-commerce management • Digital payment solutions • SEO • Expertise in integrating in-store and online shopping experience • Integrating data-driven customer insights in the industry • Sustainable retailing practices like eco-friendly packaging, ethical sourcing, etc.

Industry	Required Skills	Emerging Skills
Banking and Finance	• Analytical and accounting skills for corporate finance, wealth management and retail banking • Anti-Money Laundering Laws and other GCC-specific financial regulations • Customer service and relationship management, focusing especially on VIP and high-net-worth clients	• Blockchain • Cryptocurrency • Mobile banking technologies • Cybersecurity frameworks and fraud prevention • Sustainable investment strategies
Manufacturing and Industry	• Production management • Quality control • Engineering skills • Mechanical skills • Supply chain optimization	• Automation • AI-drive production • Robotics • Smart factories • 3D printing • Sustainable manufacturing • Resource efficiency
Information Technology	• Programming languages • Cloud computing • Network Administration • Cybersecurity	• AI • Machine Learning • Data analytics • Big data • Predictive analytics • Business Intelligence • IoT • Cloud-native development

European Union:

Industry	Required Skills	Emerging Skills
Information Technology	• AI • Machine Learning • Cloud computing • Cybersecurity • Data analytics • Intercultural communication • Adaptability skills	• IoT • Blockchain
Healthcare	• Advanced medical technologies • Telemedicine • Elderly care • Intercultural communication • Adaptability skills • Knowledge of local languages such as German, Dutch and French	
Engineering	• Sustainable engineering • Intercultural communication • Adaptability skills • Knowledge of local languages, such as German, Dutch and French	• Energy Management • Environmental Engineering • IoT • Blockchain

United Kingdom:

Industry	Required Skills	Emerging Skills
Information Technology	• Programming languages like Python, Java and C++ • Software Development • Cybersecurity focusing on network security, ethical hacking and risk management • Data analytics and data science involving data interpretation, Machine Learning and AI	• Cloud computing • Cybersecurity • AI • Software development • Data science
Healthcare	• Patient care • Diagnostics • Medical procedures • Healthcare administration • Healthcare policies • Healthcare management • Knowledge of medical devices and health informatics	• Patient care • Medical technology • Healthcare management
Engineering	• Skills in design, maintenance and troubleshooting of mechanical and electrical systems • Construction • Project management • Sustainable practices • Automation • Robotics • Precision engineering	• Sustainable practices • Advanced manufacturing techniques
Financial Services	• Financial modeling • Risk management • Investment analysis • Financial reporting • Compliance • Auditing standards • Digital banking • Blockchain • Financial technologies	• Financial analysis • Risk management • Fintech
Education and Research	• Educational pedagogy • Curriculum design • Classroom management • Scientific research • Data analysis • Academic writing • University administration • Policy • Student Services	• Scientific research • Academic writing • Teaching

Industry	Required Skills	Emerging Skills
Creative Industries	• Graphic design • Video Production • Multimedia • Digital marketing • SEO • Brand management • Visual arts • Fashion design • Creative direction	• Content creation • Graphic design • Multimedia • Adobe creative suite • Digital marketing

Australia:

Industry	Required Skills	Emerging Skills
Healthcare and Social Assistance	• Childcare givers • Aged and disabled carer givers • Nurses • Doctors	• Registered nurses • Aged and disabled care givers • Childcare givers • Personal care givers • General practitioners • Resident medical officers
Education and Training	• Teachers • Lecturer • Trainers • Instructors • Education aides • Career counselors • Laboratory technicians	• Early childhood teachers • Primary teachers • Secondary school teachers • Vocational education teachers
Construction		• Carpenters • Electricians • Construction managers • Plumbers • Painting trade workers
Manufacturing (Engineering) Sector		• Structural steel and welding workers • Metal fitters • Machinists
Profession, Scientific and Technical Services	• Scientific and technical expertise • Scientific research • Architecture • Engineering • Computer system design • Aw • Accountancy • Advertising • Market Research • Management consultancy • Veterinary Science • Professional photography	• Software and applications programmers • Advertising and marketing professionals • Solicitors

ANNEXURE 2

Country Wise GDP and Indian Diaspora Numbers in European Countries

Country Name	GDP in USD Billions	Indian Diaspora Numbers
Albania	22.98	914
Andorra	3.73	500
Armenia	24.21	9,040
Austria	516.03	65,000
Azerbaijan	72.36	2,166
Belarus	71.85	2,148
Belgium	632.22	57,668
Bosnia and Herzegovina	27.05	44
Bulgaria	101.58	1,606
Croatia	82.69	24,022
Cyprus	32.22	29,958
Czechia	330.85	18,996
Denmark	404.19	41,294
Estonia	40.74	4,656
Finland	300.18	42,718
France	3,030.00	238,000
Georgia	30.53	11,534
Germany	4,460.00	521,728
Greece	238.20	70,000
Hungary	212.39	17,468
Ireland	545.63	122,772
Italy	2,250.00	413,006
Kazakhstan	261.42	20,470
Kosovo	10.43	NA
Latvia	43.62	6,000

Country Name	GDP in USD Billions	Indian Diaspora Numbers
Liechtenstein	7.36	70
Lithuania	77.83	9,140
Luxembourg	85.75	10,642
Malta	20.95	36,500
Moldova	16.53	1,918
Monaco	8.78	106
Montenegro	7.40	NA
Netherlands	1,118.12	457,574
North Macedonia	14.76	74
Norway	485.51	55,690
Poland	811.23	48,400
Portugal	287.08	207,364
Romania	351.00	12,054
Russia	2,021.42	125,650
San Marino	1.85	0
Serbia	75.18	5,642
Slovakia	132.79	6,000
Slovenia	68.21	1,816
Spain	1,580.00	135,184
Sweden	593.27	120,000
Switzerland	884.94	52,110
Turkey	1,108.02	6,612
Ukraine	178.75	6,672

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We hope this report serves as a valuable resource for policymakers, industry stakeholders, and researchers, aiding informed decision-making and promoting the growth of Indian skilled labor in global markets.

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