

PROFESSIONAL QUALIFICATIONS – OPPORTUNITIES FOR GROWTH IN PAKISTAN

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EXECUTIVE SUMMARY

The British Council's exams business in Pakistan is one of the largest operations across the network. This paper explores options for UK professional qualifications providers to build a portfolio in Pakistan and a mix of above the line and below the line campaigns to achieve this goal.

A review of country demographics shows that Pakistan is undergoing a youth bulge with nearly six per cent of the population enrolled in tertiary education. However, the unemployment rate amongst those who have attended 14 or more years of education remains stubbornly high. This has led to a trend of educated young people seeking better opportunities abroad.

Pakistan is one of the biggest suppliers of labour force at all levels i.e. skilled, semi-skilled and unskilled. The vast majority of the labour force comes from just 20 districts of Pakistan. Skilled labour comprises only two per cent of total labour export and mainly consists of engineers, doctors, accountants and business managers.

THIS HAS LED TO A TREND OF EDUCATED YOUNG PEOPLE SEEKING BETTER OPPORTUNITIES ABROAD.

Demand for this labour comes from the Middle East and North Africa (MENA) (due to a number of big infrastructure projects) and Australia and Canada (attributable to skill shortages and immigration schemes).

This paper argues that the British Council in Pakistan should collaborate with UK exam boards to offer qualifications which are relevant to the skills demanded by key emigration destinations. This will add to the skill-sets of people looking to emigrate and improve their employability prospects, opening up opportunities in key emigration markets.

In conclusion, the paper recommends strategic marketing strands to promote professional qualifications providers in Pakistan that are a balanced mix of above the line (online/print campaigns), below the line (campus activations) and institutional partnerships. However, this plan will be most successful if implemented in agreement with UK exam boards. A number of UK exams boards and their qualifications that could potentially add value to the profile of emigration aspirants in Pakistan are listed in this report. However, this is by no means an exhaustive list and other UK examining boards not listed within this report may also benefit from the findings.

It is also noted that to drive value for money and enhanced reach and impact for the UK, stakeholders will need to undergo joint marketing and financial planning.

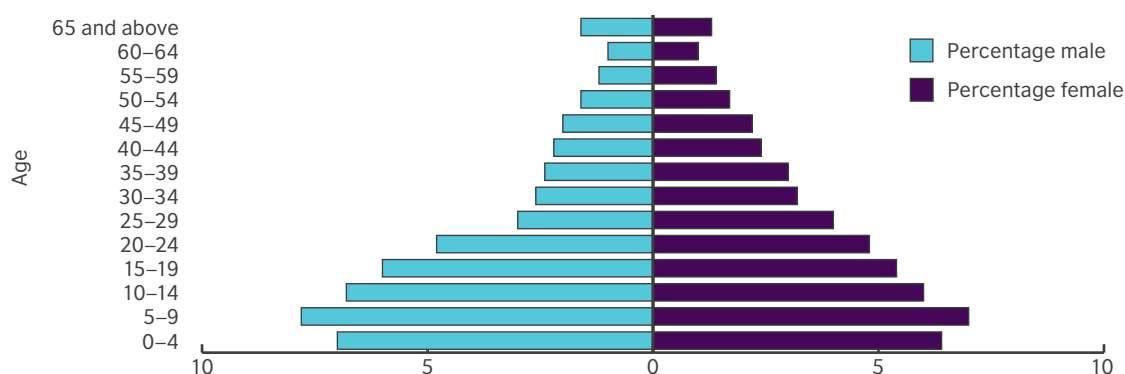
COUNTRY OVERVIEW

Population

Kugelman and Hathaway (2014) argue that Pakistan is currently undergoing a youth bulge with nearly two-thirds of the population aged under 30 – and a median age of 21. They also argue that the population is projected to reach 300 million as early as 2030.

In the next decade, the 15–24 age bracket is expected to swell by 20 per cent and as late as 2050, the median age is expected to be at only 33. The graph below shows the impact of this phenomenon.

Figure 1: Population pyramid of Pakistan 2012–13



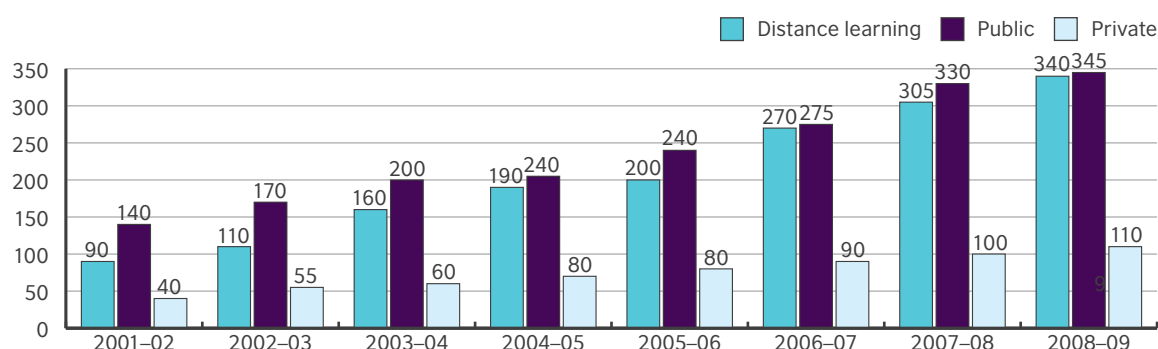
Source: Pakistan Finance Survey, 2014.

Education sector

Tertiary enrolment data for Pakistan varies from six per cent of the total population (ICEF, 2014) to ten per cent of the total population (World Bank, 2015). Latest official figures date back to 2008 when it was estimated that around five per cent of the Pakistani population was enrolled in tertiary education (Higher Education Commission Pakistan, 2008). Interestingly though, Higher Education Commission figures show that distance learning programmes have kept pace with face-to-face tertiary programmes and enrolment is almost equally divided into both segments of tertiary education.

The British Council's report on the higher education sector in India (British Council, 2014, Appendix A) agrees with ICEF Monitor and shows that six per cent of the Pakistani population was enrolled in nearly 160 universities. Official statistics (Pakistan Bureau of Statistics, 2013–14) show that those who have been in education for 14 years or more still face the prospect of unemployment with only 2.87 per cent of this population forming part of the civilian labour force (of the six per cent reported by ICEF Monitor and the British Council report).

Figure 2: Enrolment at universities and constituent colleges (students 000s)



Source: Higher Education Commission Pakistan, 2008.

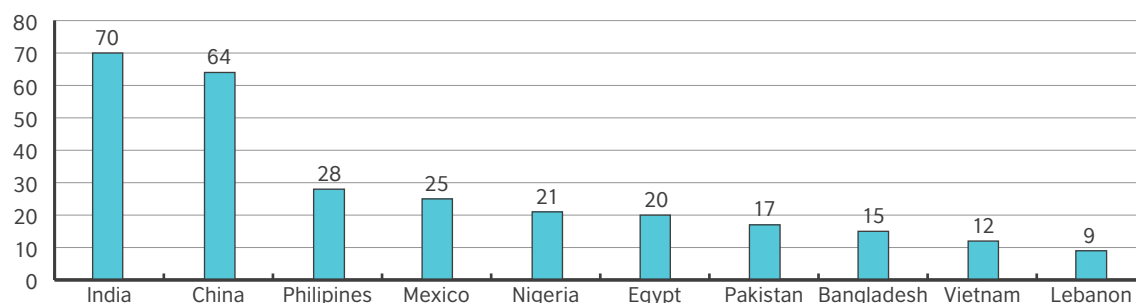
Emigration from Pakistan

The Migration and Development Brief (World Bank, 2015) places Pakistan as one of the top ten countries whose expatriate diaspora send funds back to their home country (US\$17 billion in 2013). The importance

of this figure is underpinned by the fact that the annual remittances figure for Pakistan makes up around six per cent of GDP and is around 190 per cent of foreign-exchange reserves.

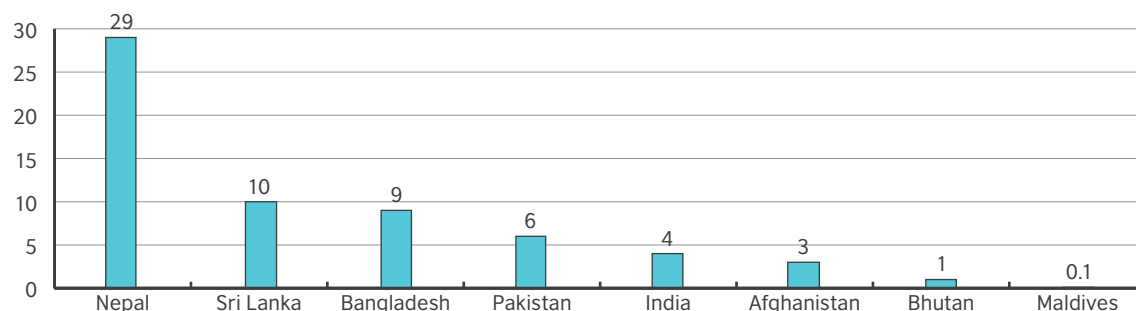
Remittances to South Asia region countries are large relative to GDP and international reserves

Figure 3: \$ billion, 2014e



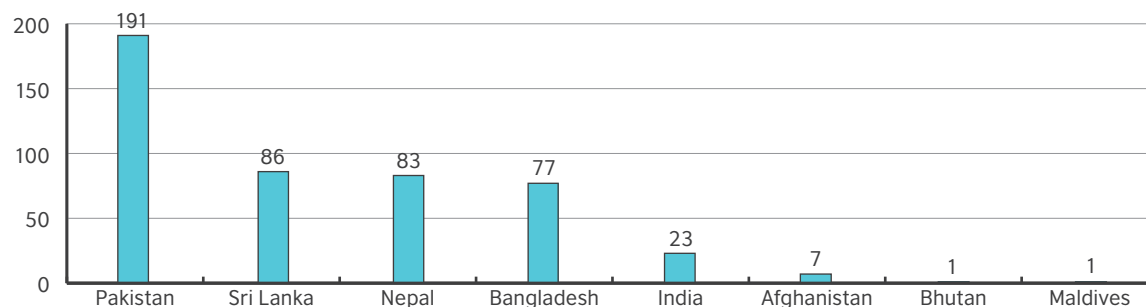
Source: World Bank, 2015.

Figure 4 : Percentage of GDP, 2013



Source: IMF, World Bank Development Indicators and staff estimates.

Figure 5: Percentage of reserves, 2013

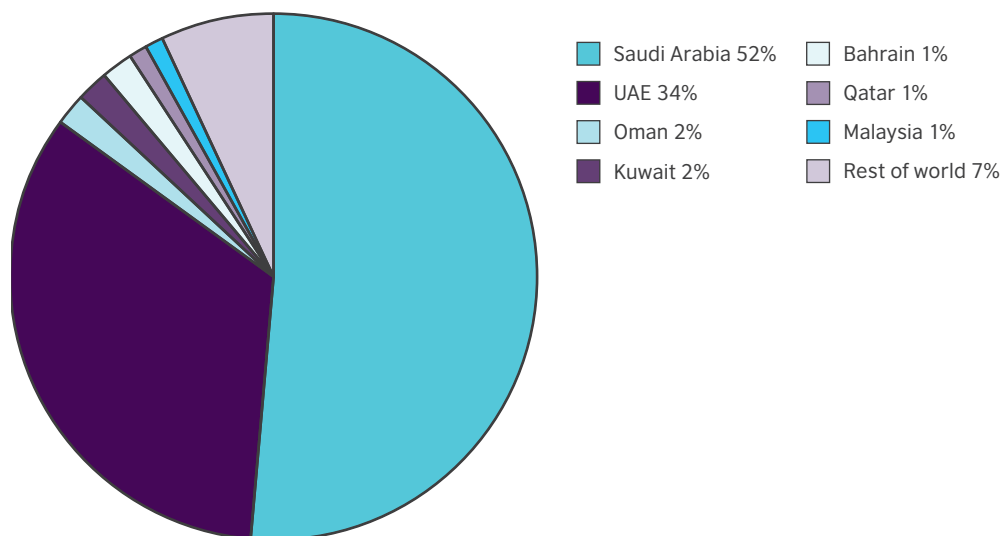


Source: IMF, World Bank Development Indicators and staff estimates.

These figures are also substantiated by official figures from the government of Pakistan (Bureau of Emigration and Overseas Employment, 2015) which show that over 86 per cent of Pakistanis who send money back home

are based in just two MENA countries (Saudi Arabia and UAE). The table in Appendix B shows actual numbers from Pakistan living in different countries abroad, together with the limitations of this data.

Figure 6: Location of expatriates who send money back to Pakistan



Source: Bureau of Emigration and Overseas Employment Pakistan, 2015.

Country analysis

With a huge 75 per cent of the Pakistani population under the age of 35 (Ministry of Finance, Pakistan – Statistics Division, 2013–14) facing high unemployment rates (Economywatch, 2015), the rising cost of living (Pakistan Bureau of Statistics, 2013), lack of political will and direction for structured reforms (Haider, 2012) and dynamic security environment (South Asia Terrorism Portal, 2015), there is a trend among young people to go abroad not only for safer or better futures but also to support their families back home (World Bank, 2015).

Also, Pakistan has been chosen as one of the top ten emerging economies by the World Economic Forum in its recent publication which states that ‘Pakistan will develop as a manufacturing hub over the coming years, with the textile and automotive sectors posting the fastest growth at the beginning of our forecast period. Domestic manufacturing investment will be boosted by the windfall from lower energy prices compared to the last decade, and improved domestic energy supply.’

STRATEGIC AUDIT

Macro environment

OPPORTUNITIES AND THREATS MATRIX

		Probable	Possible
Impact on British Council	Very significant	<p>Threat: Security situations and political instability (Institute of Economics and Peace, 2014; South Asia Terrorism Portal, 2015)</p> <p>Opportunity: Online distance learning courses requiring exams (Open University, 2016; University of Oxford, 2016)</p> <p>Opportunity: Trend of moving abroad for employment and stability (Sajjad, 2011; Journal of Asian Business Strategy, 2012; Dawn, 2004)</p>	<p>Threat: Low per household spend on higher education (Pakistan Bureau of Statistics, 2013)</p>
	Significant	<p>Threat: Low internet penetration rate (Internet World Stats, 2015; PTA, 2015)</p>	<p>Threat: Legal issues in acceptance of foreign qualifications by higher education authorities and professional bodies seeing these as competition for their offerings, for example ACCA, dual degree programmes</p> <p>Opportunity: Perception of foreign qualifications as better quality than local qualifications</p>

Technological

The internet has opened opportunities for professionals to expand their skills and gain quality education online (Economist, 2015) to increase their competitive advantage in the employment market. These opportunities include free online courses without any formal exam as well as online courses with a formal exam taken online or with pen and paper or as part of dual degree programmes in collaboration with local

universities. According to Internet World Stats (2015), internet penetration in Pakistan is 14.6 per cent, making it the lowest in South Asia, and means that a large proportion of the population are not be able to take advantage of these opportunities. However, the Pakistan Telecommunication Authority (PTA) reports mobile density at 65 per cent (2015) and following the introduction of 3G services the number of mobile broadband users is on the rise meaning that internet penetration is likely to increase in the future.

Legal

Higher education qualifications and certifications require local acceptance by higher education authorities as well as professional bodies to attract equivalency and/or acceptance in the relevant

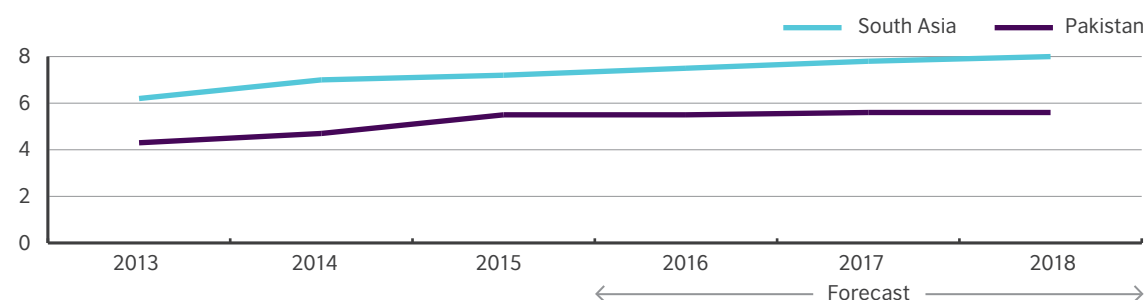
professional field. For example, a law professional would require a licence from the Pakistan Bar Council to practise law in the country. Similarly, ACCA has recently had problems with ICAP which has had a negative effect on ACCA business.

Economic

The World Bank (2014) reports positive growth in GDP from 3.5 per cent in 2012 to 4.7 per cent in 2014. Spend on education (HIES, 2011) reveals that families are spending less than 3.5 per cent on education. On

the other hand, a trend of moving abroad for better career opportunities is observed in highly qualified professionals which suggests that qualified professionals are willing to invest in education perceived to bring higher returns (Journal of Pakistan Medical Association, 2014; Tribune, 2013).

Figure 7: Real GDP growth (%)



Source: The World Bank (2014).

Political

Political uncertainty, terror threats and the fast-changing security environment (Institute of Economics and Peace, 2014; South Asia Terrorism Portal, 2015) have an impact on people's careers and family life. Security and economic crises can cause concerns which lead to qualified professionals seeking a more

secure and stable environment (Sajjad, 2011; Journal of Asian Business Strategy, 2012). An academically progressive environment with better financial reward and stable socio-economic conditions is an attraction for these professionals. The political and security conditions drive the demand for better qualifications to compete in a global market but could also be a challenge in delivery of exams locally.

Social

The job market gives preference or in some cases makes it a mandatory requirement for an individual to obtain internationally recognised professional

certifications. An example of this is the requirement of PMP or PRINCE2 certified professionals for project management jobs and NEBOSH certification being preferred for HSE jobs (Appendix D).

Micro environment

Prospective candidates have a wide array of competing certifications/qualifications and test providers available in the market to choose from. The competition is largely classified into local and international.

Local competition

Higher education (HE) institutions: local HE institutions are establishing international links with universities in the UK, USA, Germany, Malaysia, Turkey, Singapore and China to name a few (SZABIST, 2016; PU, 2015; IBA, 2016). In addition, some HE institutions offer internationally accepted certifications through collaborations with organisations like Microsoft, Cisco, SAP, etc. These links are established to compete in the local as well as global market for recruiting students (IBA, 2016). The Higher Education Commission allows local institutions to offer courses in collaboration with universities abroad (HEC, 2016).

These collaborations are currently for exchange programmes and research, but could lead to dual degree programmes in addition to certifications. HE institutions with established links with international universities are set out below.

- **SZABIST** is offering a dual degree programme in Law in collaboration with the University of London.
- **Punjab University** directorate of international links has formed a partnership with St Andrews in the UK to offer a joint degree and split PhD programme.
- **IBA** Karachi has established links with a number of US and Australian universities for teacher and student exchange programmes. It has also established links with organisations offering certifications like SAP, ORACLE, Microsoft, etc.
- **IoBM** in Karachi has signed academic co-operation agreements with a number of universities in US, Singapore, China, Germany, Turkey etc. for student exchange programmes, research and PhD programmes.
- **Management Development Institute (MDI)**, based in Islamabad, offers business degrees offered by University of Southern Queensland Australia and offers dual degree programmes.
- **Roots College International (RCI)** runs BSc (Hons) and LLB in collaboration with the University of London, UK.

- **Namal College** Minawali offers two degree programmes BSc (Hons) in Computer Science and BEng (Hons) in Electrical and Electronic Engineering in affiliation with the University of Bradford, UK.
- **Hajvery University** in Lahore offers dual degree programmes for business degrees at graduate and postgraduate levels in collaboration with universities in Germany, Turkey, Netherlands, Belgium, Spain and Cyprus, etc.
- **Bahria University** has established partnerships with universities from UK, Turkey, Malaysia and China. The areas of collaboration include faculty and student exchange and joint research (Bahria University, 2016).

Professional bodies

The professional bodies have responsibility for granting licences and are authorised by government. Some of these offer professional development programmes developed locally or in collaboration with an international partner for their members. Some prominent names are listed below:

- Institute of Bankers Pakistan
- The Institute of Forensic Accountants of Pakistan
- Institute of Chartered Accountants of Pakistan
- College of Physicians and Surgeons Pakistan
- Pakistan Medical and Dental Council
- Institute of Cost and Management Accountants of Pakistan
- Pakistan Nursing Council
- Pakistan Bar Council
- Pakistan Engineering Council
- Pakistan Pharmacy Council.

International competition

A number of professional certifications are currently offered in Pakistan. A large majority of these are offered by US boards or organisations. Some of the popular certifications include PMI (USA) and SHRM (USA). IT certifications are offered by a number of US organisations including Microsoft, Cisco and SUN. These have a strong presence and are widely accepted in both local and global markets. A number are listed below.

- **Project Management Institute (PMI)** USA offers project management certifications. PMI has a strong presence in Pakistan and is a requirement for project management roles.
- **Society for Human Resource Management (SHRM)** USA is the world's largest HR membership organisation. It offers certifications for human resources professionals and has a strong presence in Pakistan with regular events for members.
- **ETS** offers TEFT and TKT courses in affiliation with local institutions. With their partnership with NTS they have a wide geographic reach to promote these courses to local schools and teachers.
- **National Council Licensing Examination – Registered Nurse (NCLEX – RN)** is a nursing qualification required for nurses in USA. Currently offered by very few institutions in Pakistan.
- **Board of Pharmacy Specialties (BPS)** is a US board offering certifications for various disciplines for pharmacists and is accredited by the National Commission for Certifying Agencies. Currently not offered in Pakistan but could be potential competition.

Customers

Target customers are classified based on needs and demographics as listed below.

- A.** Highly qualified individuals with a professional graduate or postgraduate qualification with eight to ten years of experience, age range 33–38 years, aspiring to move abroad for stability, security and better prospects for family and career. These are more likely to fulfil the immigration criteria of chosen destinations.
- B.** Professional degree holders at bachelors' level with three to five years of experience, age range 27–32 years, seeking foreign qualification to distinguish themselves either in local or external markets.
- C.** Social sciences and other degree holders (BA, BCom, BEd etc.) with seven to eight years' experience, age range 25–35 years, seeking a career transition through adding new skills, qualifications or certifications.
- D.** Fresh graduates and individuals with one to two years' experience, holding bachelor's or master's degrees, age range 23–26 years, seeking to add further relevant certifications to gain competitive advantage in the job market.
- E.** Employed individuals with secondary level of education, working at junior to mid management level, seeking to add on qualifications/certifications to advance in career.

Targeting strategy

The GE matrix (Porter, 1982) has been used to assess the attractiveness of the market segments described above relative to the UK professional qualifications providers as well as the British Council's competitive advantage.

The GE matrix clearly shows that the UK education sector should reinforce its competitive advantage by focusing on segments A, B, and C where we have a high competitive edge with required differentiators.

		SEGMENT ATTRACTIVENESS			
		High	Medium	Low	
COMPETITIVENESS ADVANTAGE	High	Segment A: Highly qualified individuals with a professional graduate or postgraduate qualification with eight to ten years of experience, age 33–38, aspiring to move abroad for stability, security and better prospects for family and career, more likely to fulfil the immigration criteria.	Segment B: Professional degree holders at bachelors' level with three to five years of experience, age range 27–32 years, seeking foreign qualification to distinguish themselves either in local or external markets.		DOES THE CUSTOMER WANT TO BUY?
	Medium		Segment C: Social sciences and other degree holders (BA, B.Com, B.Ed etc.) with experience of seven to eight years, age ranging >25 and <35 years, seeking a career transition through adding new skills, qualifications or certifications.	Segment D: Fresh graduates and individuals with one to two years' experience, holding bachelors or master's degrees, age ranging 23–26 years, seeking to add further relevant certifications to have competitive advantage in the job market.	
	Low			Segment E: Employed individuals having secondary level of education, working at junior to mid management level, seeking to add on qualifications/ certifications to advance in career.	
		DOES THE COMPANY WANT TO SELL?			

ANALYSIS OF SUPPLY SIDE

SUPPLY OF LABOUR FORCE FROM PAKISTAN

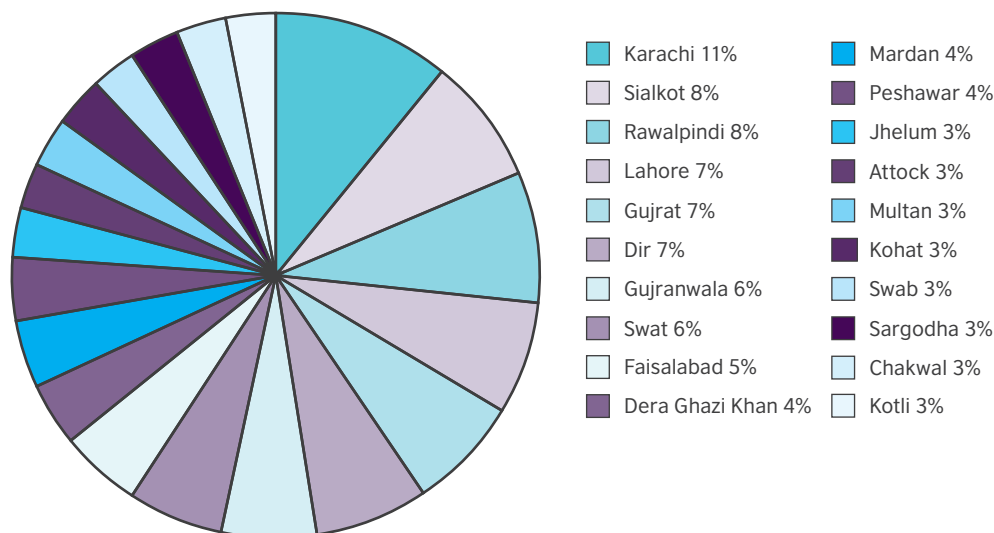
The PILDAT report 2008 suggests that the vocationally trained and semi-unskilled workforce constitute just over 60 per cent of the total Pakistani migrant workers including drivers, labourers, masons, carpenters etc. This compares to just two per cent of the total workforce who can be classified as white collar workers, including doctors, engineers, accountants, managers and teachers. The remaining 35 per cent plus of the migrant workforce has been attributed to unskilled labour.

The report also suggests that Punjab and Khyber Pakhtun Khwa (KPK) provide the majority of the migrant workforce, with 77 per cent coming from these two provinces alone (PILDAT, 2008). The same report also suggests that the Middle East is a preferred destination for the vocationally trained and semi-skilled workforce, whereas highly qualified and highly skilled workers prefer MENA, Europe and

North America. Interestingly, PILDAT argues that nearly 85 per cent of emigrants do not take their families with them to overseas destination – a point also supported by the World Bank (2015) report on migration and remittances flow described above.

Bureau of Emigration and Overseas Employment (2015) data backs up the PILDAT report findings and suggests that the top 20 districts account for over 56 per cent of the total migrant force of Pakistan and mostly belong to Punjab (11 districts) and KPK (five districts) provinces. The only notable exception is Karachi, which also supplies the biggest labour force from Pakistan. Another key insight that can be derived from this data is that Eastern Punjab districts (Sialkot, Gujranwala, Gujrat, Lahore) and Northern Punjab districts (Rawalpindi and Jehlum) are key supplier markets.

Figure 8: Top 20 districts suppliers of labour force in Pakistan

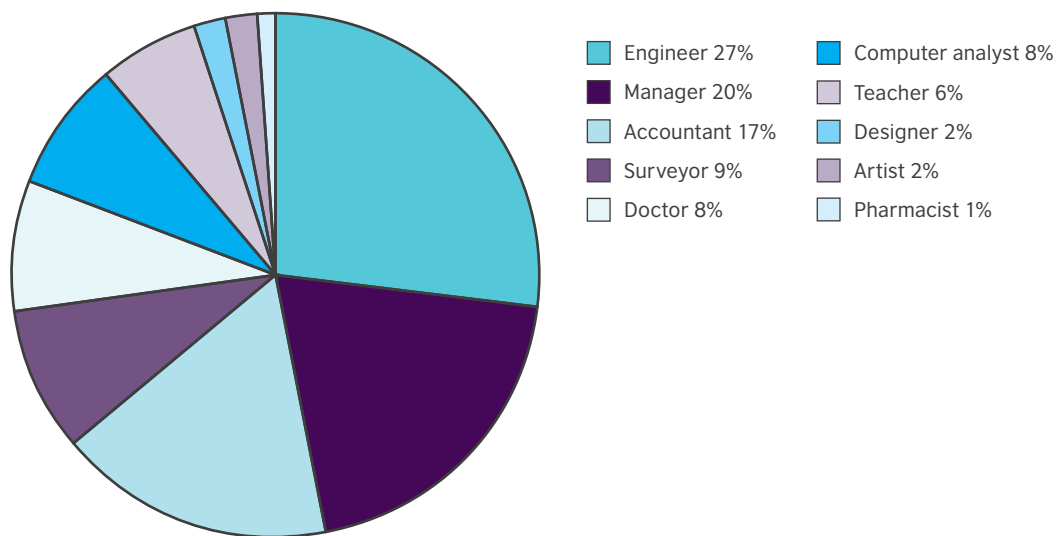


Source: PILDAT, 2008.

Bureau of Emigration and Overseas Employment data also suggests that engineers, managers, accountants, surveyors, doctors, computer analysts, teachers and pharmacists are the most in-demand white collar

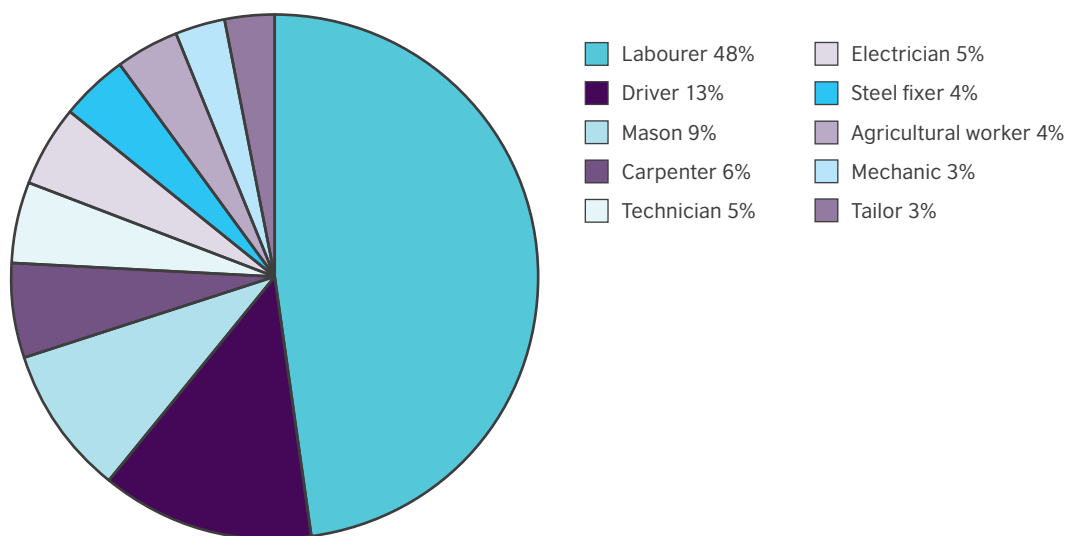
professions from Pakistan. In terms of top blue collar categories, drivers, masons, carpenters, technicians and electricians top the charts.

Figure 9: Top ten white collar jobs for Pakistan labour



Source: Bureau of Emigration and Overseas Employment, Pakistan.

Figure 10: Top ten blue collar jobs for Pakistan labour



Source: Bureau of Emigration and Overseas Employment, Pakistan.

SKILLED LABOUR EMIGRATION IN PAKISTAN

Bureau of Emigration and Overseas Employment
2015 data suggests that around two per cent of
total tertiary enrolment in Pakistan opts for skilled

emigration abroad. Information about these
professionals is set out below.

PROFESSION	NUMBERS
Doctors	According to the Pakistan Medical and Dental Council the number of registered medical practitioners in Pakistan is 202,135 as of October 2015.
Engineers	Pakistan Engineering Council (PEC), the official statutory body of engineers in the country, has 170,992 registered members as of June 2014. It is estimated that approximately half of the engineers do not register with PEC as it is not a regulatory requirement. This gives an estimated total of around 256,500 engineers.
Accountants	The number of qualified accountants according to the Institute of Chartered Accountants of Pakistan is 6,718 and the Institute of Cost and Management Accountants has over 5,000 members. Taking into account other accounting qualifications that include bachelors of commerce, CIMA and ACCA it is estimated that the total number of qualified accountants is around 51,700 .
Teachers	The Pakistan Education Statistics report by Academy of Educational Planning and Management Ministry of Federal Education report 251,452 qualified teachers (AEPAM, 2014). These are teachers who hold MPhil and PhDs.
Pharmacists	The World Health Organization's report on pharmaceutical country profiles estimates that the registered pharmacists population is 36,518 (World Health Organization, 2010).
Business managers	The number of business managers is estimated at 150,000 based on the number of business schools and approximate number of graduates.
Surveyors	No data is available for surveyors but these are roughly estimated at 50,000 .
Computer analysts	The number of computer analysts is estimated at 100,000 based on the number of engineering universities and approximate number of graduates.

In total there are just above one million professionals who would be the potential target audience for UK qualifications to improve career prospects.

As reported above, PILDAT (2008) argues that a minimum of two per cent of skilled labour exports comes from this population. Calculating the figures below:

- Labour exports per year are **602,200** calculated as an average of five years' data by Bureau of Emigration and Overseas Employment, 2015.

- Skilled labour moving abroad – **two per cent** (PILDAT, 2008).
- Skilled labour moving abroad per year: **12,044**.

This means that around 12,000 out of one million moves abroad are part of a skilled migration programme. However, anecdotal evidence from the higher education sector suggests that the actual number of students studying foreign qualifications in Pakistan may be much higher than those who opt for emigration after these studies.

ANALYSIS OF DEMAND SIDE

In this section, four major markets/emigration destinations that are actively seeking skilled, vocationally trained as well as semi-skilled labour from across the world, including Pakistan, have been examined. Analysis includes the reasons for demand as well as insights into the kind of skills being demanded by these destinations – again divided between blue and white collar jobs.

The analysis of in-demand professions at these destinations represents the skill gaps that these countries have. The analysis will cover following destinations choices:

- Australia
- Canada
- MENA
 - UAE
 - Saudi Arabia
 - Oman.

AUSTRALIA

Official statistics (Australian Bureau of Statistics, 2015) puts the population of Australia at 23.5 million, of which 28 per cent comprises people who were born overseas, i.e. immigrants.

According to the Australian Department of Immigration and Border Protection's report (2015), Australia has an immigration system that identifies the skills gaps quantitatively and for every profession there is a ceiling identified by Department of Immigration and Border Protection Australia. A list of top in-demand occupations is available in Appendix C. Engineers and computer/IT professionals form the majority of applicants from Pakistan for Australian immigration.

Top in-demand occupations in Australia include secondary school teachers, construction managers, engineers and healthcare professionals in the white collar category and nurses, technicians, plumbers, electricians in the blue collar category.

CANADA

As per the 2011 census the population is 33.5 million, of which 20.6 per cent are immigrants. According to official statistics (2011) the largest source of immigrants were countries in Asia and the Middle East.

In January 2015 Canada introduced changes to its immigration policy that required submission of an expression of interest by the applicant to Citizenship and Immigration Canada (CIC).

The official CIC newsletter (CIC News, 2015) suggests that the new system, called Express Entry, is based on points called through a Comprehensive Ranking System (CRS) where applicants scoring high points are issued an 'Invitation to Apply' (ITA). This slowed down the immigration process for applicants worldwide. However, with the changes in policies the barriers are being lifted and as the CRS is lowered, more candidates from Pakistan with skilled migration profiles become eligible to apply for this immigration scheme.

Canada has a list of in-demand occupations under the Federal Skilled Worker Programme that works along with the Express Entry programme. A list of in-demand professions is provided in Appendix C. The majority of applicants from Pakistan for Canadian immigration include doctors, engineers, managers, and human resources professionals in the white collar category and engineering technicians, chefs, plumbers, carpenters and electricians in the blue collar category.

MIDDLE EAST

The countries of the Middle East attract a Pakistani workforce for economic reasons as well as geographic proximity. Following the oil boom and demand for foreign workers in the region this is by far the largest market for a Pakistani workforce. An analysis of some of the key destination countries and the in-demand occupations in these destinations is given below:

United Arab Emirates

CIA World Factbook (2015) estimates the country's total population to be 9.4 million as of mid-year 2014. According to UN data (UN Economic and Social Commission for Western Asia, 2010) immigrants make up more than 80 per cent of the total population. Pakistan's Ministry of Overseas Pakistanis and Human Resources Development's literature (2015) suggests that the demand for occupations/skills of foreign workers in UAE is driven by the upcoming large projects. Some of the major projects expected to create demand for workforce to be imported are listed as below:

- Dubai World Expo 2020
- Dubai Exhibition City
- Arabian Canal
- Business Bay Dubai
- Jumeirah Garden City.

Taking these projects into account, the in-demand occupations in the mid-term are shown in Appendix C.

Saudi Arabia

The population of Saudi Arabia is 27.7 million, of which immigrants account for more than 30 per cent, according to UN data and the CIA World Factbook (2015).

Saudi Arabia has an oil-based economy with strong government controls over major economic activities. It possesses about 16 per cent of the world's proven petroleum reserves, ranks as the largest exporter of petroleum, and plays a leading role in OPEC. The CIA World Factbook (2015) suggests that the petroleum sector accounts for roughly 80 per cent of budget revenues, 45 per cent of GDP and 90 per cent of export earnings. Economy diversification efforts are focusing on power generation, telecommunications, natural gas exploration and petrochemical sectors. Over six million foreign workers play an important role in the Saudi economy, particularly in the oil

and service sectors. Pakistan's Ministry of Human Resources Development (2015) suggests that the demand for occupations/skills of foreign workers in Saudi is driven by large upcoming projects. Some of the major projects expected to create demand for an imported workforce are listed below:

- Riyadh Metro Project
- construction of 34 airports across Saudi Arabia
- healthcare-related projects
- shifting of communications to the latest IT systems will increase IT expenditure and demand for IT professionals
- housing projects in Madina, Jeddah, Dammam, Qatif and Kharj.

Taking these projects into account, the in-demand occupations in the mid-term are shown in Appendix C.

Oman

The CIA World Fact book (2015) puts the country's population at 3.3 million, of which immigrants account for just 30 per cent. The CIA World Factbook also suggests that Oman is heavily dependent on dwindling oil resources, which generates 77 per cent of government revenue. It is using enhanced oil recovery techniques to boost production. Muscat has actively pursued a development plan that focuses on diversification, industrialisation and privatisation, with the objective of reducing the oil sector's contribution to GDP from between 46 per cent and 49 per cent by 2020. Tourism and gas-based industries are key components of the government's diversification strategy. Major industries include crude oil production and refining, natural and liquefied natural gas (LNG) production, construction, cement, copper, steel, chemicals and optical fibre. Pakistan's Ministry of Human Resources Development (2015) suggests that the demand for occupations/skills of foreign workers in Oman is driven by large upcoming projects. Some of the major projects expected to create demand for an imported workforce are shown below:

- Salalah International Airport Expansion Project
- Oman National Railway Project
- Sultan Qaboos Medical City Complex
- International Medical City.

Taking these projects into account, the in-demand occupations in the mid-term are shown in Appendix C.

ANALYSIS – SKILLS MOST NEEDED

In this section, the in-demand professions and skills in all destinations analysed above (details also given in Appendix C) have been collated to identify skills needed in the short to medium term in top emigration destinations.

Top in-demand professions by destinations of choice for Pakistani workforce are as given below:

White collar occupations

OCCUPATION	COUNTRIES
Accountant	Oman, Saudi Arabia, UAE, Canada, Australia
Civil engineer	Oman, Saudi Arabia, UAE, Canada, Australia
Mechanical engineer	Oman, Saudi Arabia, UAE, Canada
Doctor (GP)	Oman, Saudi Arabia, UAE, Australia
Electrical engineer	Oman, Saudi Arabia, UAE, Canada, Australia
Computer engineer/IT professional	Oman, Saudi Arabia, UAE, Canada, Australia

Blue collar occupations

OCCUPATION	COUNTRIES
Nurse	Oman, Saudi Arabia, Australia
Pharmacist	Oman, Saudi Arabia
Radiologist	Oman, Saudi Arabia
Rigger	Oman, Saudi Arabia, UAE
Accounting technician	Saudi Arabia, UAE, Oman, Canada
Plumber, carpenter, mason, electrician	Oman, Saudi Arabia, UAE, Canada, Australia





POTENTIAL UK BOARDS

We have reviewed the in-demand professions in various immigration destinations to identify the areas where there is scope to introduce new UK professional qualifications in Pakistan.

OCCUPATION	EXAM	BOARD	COMPETITION
Engineers, project Management	PRINCE2	AXELOS Limited	UKPMI (USA)
Engineers	<ul style="list-style-type: none"> Multiple 	ABC Awards, Awarding Body for the Built Environment, British Safety Council, Cskills Awards, ECITB, ETC Awards Ltd., ProQual Awarding Body, International Well Control Foundation (IWCF), PAA\WQ-SET	Local qualifications
Computer engineer/ IT professionals	<ul style="list-style-type: none"> Diploma of Higher Education in Computing and IT Multiple 	Open University (UK), BCS, The Chartered Institute of IT, NCC Education, The Learning Machine, Institute of Management Information Systems (IMIS)	Local qualifications
Nurses	<ul style="list-style-type: none"> Certificate in Health and Social Care Multiple 	Open University (UK), ATHE, Council for Awards in Care, Health and Education, ProQual Awarding Body, Training Qualifications UK	NCLEX-RN, USA Local qualifications

OCCUPATION	EXAM	BOARD	COMPETITION
Pharmacists	<ul style="list-style-type: none"> Overseas pharmacists' assessment programme (OSPAP) (Pre-requisite: IELTS) 	General Pharmaceutical Council delivers OSPAP, UK through following providers; <ul style="list-style-type: none"> Aston University (Birmingham) University of Brighton Kingston University University of Sunderland University of Hertfordshire 	BPS, USA
Accounting technician	<ul style="list-style-type: none"> Entry Certificate in Accounting Introductory Certificate in Accounting Advanced Certificate in Taxation and Ethics Advanced Certificate in Bookkeeping and Ethics 	Association of Accounting Technicians (AAT), UK	Local qualifications Bachelor of Commerce, Diploma courses. No global certification at this level currently available
Business managers/ bankers	<ol style="list-style-type: none"> Professional Banker Certificate Certificate in Complaint Handling 	Chartered Banker Institute, UK	No competitive certifications in this area identified
Teachers	TKT (Teaching Knowledge Test)	Cambridge English Language Assessment (CELA), UK	TEFT – Test of English-for-Teaching and; TPK – Test of Professional Knowledge for ELT (ELTeach, 2015) Both are US-based

OCCUPATION	EXAM	BOARD	COMPETITION
Business managers/HR professionals	CIPD Certification	CIPD (Chartered Institute of Personnel and Development), UK	Society of Human Resource Management (SHRM, 2015)
Business managers/HR professionals	1. Level 3 Certificate 2. Level 5 Diploma 3. Level 6 Diploma	Association of Business Executives, UK	Local business degrees and certification programmes
Travel, tourism and hospitality management	1. Level 3 Certificate 2. Level 5 Diploma 3. Level 6 Diploma	Association of Business Executives, UK	Local qualifications in collaboration with international bodies (COTHM)
Entrepreneurs/start-ups	Level 3 Certificate in Business Start-up (New Exam)	Association of Business Executives, UK	Local business degrees and certification programmes

MARKET INSIGHTS – OTHER POTENTIAL AREAS OF GROWTH

Discussions with leaders of HE institutions highlighted a few more areas of growth for UK professional qualifications in Pakistan, as listed below.

- **Healthcare management** – there is room for growth within the healthcare industry as the existing infrastructure does not meet demand. As this expands there will be a demand for professionals to manage the healthcare-providing institutions. These professionals are not available locally and there is a demand from the industry who have approached universities and higher education institutions to cater for this demand through professional training, courses and qualifications
- **Supply chain** – with rapid development in the region and projects under way in the China–Pakistan Economic Corridor, it is anticipated that there will be a big demand for professionals in this segment and this is another area that the HE institutions are keen to tap into. Internationally recognised UK qualifications would be an attractive offering.
- **Schools and education management** – Primary and secondary education is another segment receiving investment and growing rapidly. The expansion of school systems reflects the growth potential. The need for professionals and reformers to administer and manage these entities is expected to continue to increase and the existing qualifications do not meet this demand, and this could be one of the areas for offering UK qualifications.

- **Teacher certifications and professional development qualifications** – linked to the above, there is a need for professional development qualifications for primary and secondary level teachers both at institutional as well as individual level. UK qualifications and/or certifications in this area would be a valuable addition for this segment.
- **Petroleum industry/rigging certifications** – a sizeable number of Pakistani professionals move to the MENA region and work in this industry. Holding a UK qualification in this area would provide a competitive edge for these professionals.

One key aspect highlighted by the professional exams operations team from the queries received and discussion with candidates was the availability of preparation support for the qualification offered. A list of course providers for various qualifications is provided in Appendix E.

RECOMMENDATIONS

It is envisaged that market development for UK professional qualifications in Pakistan will need a three-pronged strategic marketing plan to raise the profile of UK professional qualifications in Pakistan as well as to engage stakeholders at all levels, i.e. candidates, influencers and thought-leaders.

It is important to note, however, that this paper looks at market development and communication strategies from the British Council's perspective in Pakistan. In order to maximise the synergies and to identify/mitigate any potential risks, the Exams British Council team will need to work with the potential/selected exam boards.

Further work should be undertaken to look at existing data (provided by UK exam boards) to develop a more thorough understanding of consumer behaviour, market seasonality and market segments prior to targeting lucrative segments and developing positioning strategies to develop a local market for UK professional exams.

Messaging:

The message will be composed of three components:

1. Information about UK qualifications.
2. Value proposition to candidates.
3. Call to action on the customer journey – to drive traffic to a dedicated landing page on the British Council website.

The three-pronged strategy for stakeholder engagement is set out below.

1. ABOVE THE LINE COMMUNICATION STRATEGY

An above the line campaign to raise awareness of UK professional exams will need to be undertaken. Experience suggests the following channels for this strategy strand:

Candidates:

- i. Radio (morning and evening drive-time shows – catering to office-bound or returning-home segments).

Candidates/influencers/thought-leaders:

- ii. Print (Business Recorder/Express Tribune/industry journals – catering to highly skilled segments).

Candidates/influencers/thought-leaders:

- iii. Digital (websites of English dailies – catering to highly skilled segments).

Candidates/influencers/thought-leaders:

- iv. Digital (social media channels i.e. Facebook and Twitter paid media – catering to highly skilled segments)

2. CAMPUS ACTIVITIES

The British Council will also need to take the information about UK examination boards and their qualifications directly to final-year students at selected engineering/medical and business schools across Pakistan.

The proposition for students is added value to their profiles in the face of intense competition in the local job market and/or better job prospects abroad.

These activities should take place in co-ordination with university leaders and will focus on candidates (T1 audience), teachers (T2 audience) and university leaders (T3 audience).

An interesting avenue to pursue in this regard will be alignment of local curricula to UK examination boards' qualifications in order to create sustainable business growth.

The frequency and the timing of these activations will need to be agreed with UK and Pakistani stakeholders.

3. INSTITUTIONAL PARTNERSHIPS

There are a number of professional bodies operating in Pakistan ranging from engineering (PEC and IoEP) to medical (PMDC) to banking (IoBP). It is recognised that the endorsement of these professional bodies will be an important landmark in the process of establishing a local market for UK professional qualifications. Levers of brand association as well as benefits to members of these bodies will need to be clearly identified through stakeholders' discussion between the British Council and UK professional qualification providers.

In addition, institutional employers of skilled labour may also be interested in up-skilling the employee base through UK professional education and qualifications. The bulk of business growth will come from these employers.

These partnerships will need careful deliberations at all levels to ensure we get our positioning strategy right for all targeted segments. This paper is the first step in the journey.

APPENDIX A

COUNTRY OVERVIEW – KEY STATISTICS

Demographics

- Population: 189 million (Rana, 2015)
- Gender distribution 52 per cent male 48 per cent female (Pakistan Bureau of Statistics, May 2015)
- 39 per cent of the population lives in urban areas (CIA, 2015)
- 21 per cent of population is in the age group 15–24 years (CIA, 2015)
- 36 per cent of population is in the age group 25–54 years (CIA, 2015)

Economy

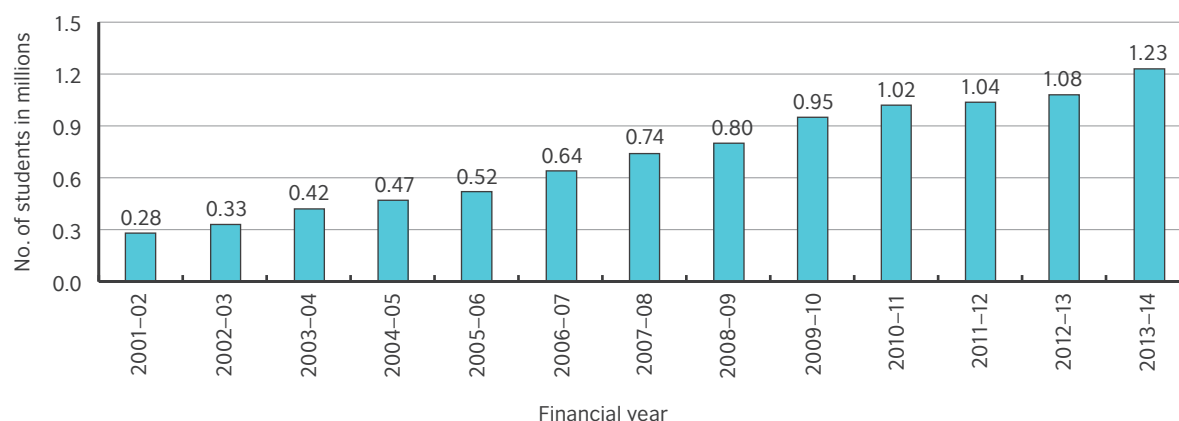
- GDP growth rate 3.71 (2014) (World Bank, 2015)
- Per capita income: US\$1,513 (Rana, 2015)

Education

- Literacy rate 56 per cent (AEPAM, 2014)
- An estimated 0.6–0.8 per cent of population enrolled in universities for higher education (AEPAM, 2014)

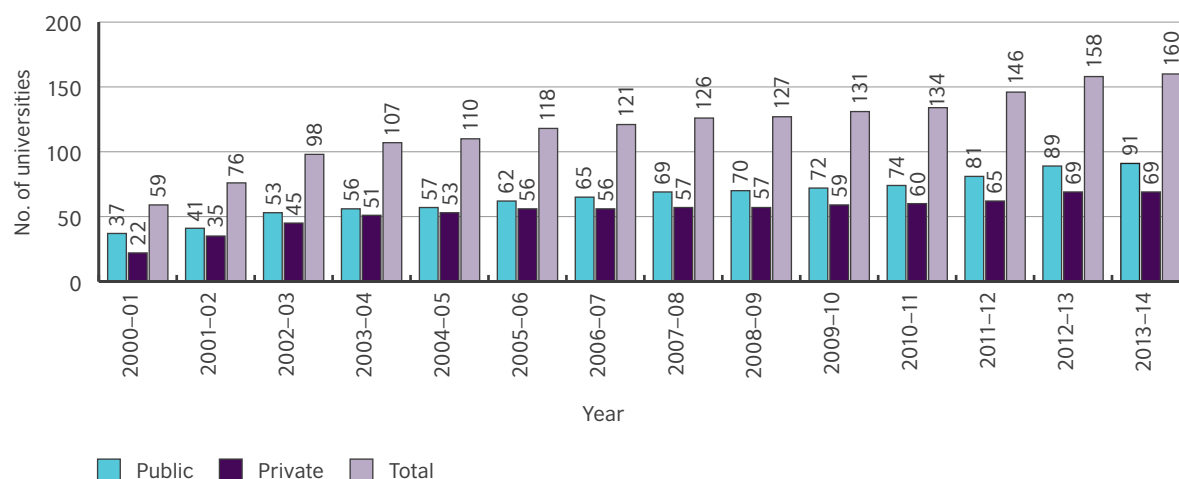
A trend of enrolment and universities is as below;

Figure 11: Higher Education Enrolments (2001–14)



Source: British Council India, 2014.

Figure 12: Recognised universities in Pakistan (2000–14) (British Council India, 2014)



Source: British Council India, 2014.

APPENDIX B

Number of Pakistanis overseas by country 1971–2015
(Bureau of Emigration and Overseas Employment, 2015)

COUNTRY	TOTAL EMIGRANT WORKFORCE 1971–2015	COUNTRY TOTAL AS A PERCENTAGE OF TOTAL
Saudi Arabia	4,190,282	50.09%
UAE	2,757,436	32.96%
Oman	631,921	7.55%
Kuwait	181,383	2.17%
Bahrain	140,421	1.68%
Qatar	119,845	1.43%
Malaysia	62,987	0.75%
Italy	27,883	0.33%
UK	12,063	0.14%
USA	4,649	0.06%
Others	237,580	2.84%

Limitations of data

It should be noted here that the Bureau of Emigration and Overseas Employment mostly registers those Pakistanis who obtain a work permit before their departure from Pakistan. The system is very effective for most work categories, but it does tend to miss out on workers of higher skills or those who fall in the professional category and those who migrate on immigration visas. Another limitation of this data is that it records the outflow but does not record the return flow of workers back in the country or to other regions or countries.

In regard to the Gulf region, many high-skilled workers may seek a job without registering with the Bureau of Emigration and Overseas Employment. But since their share of the labour force is under five per cent, any gaps in registration might not significantly alter estimates of the total size of the Pakistani labour force in the Gulf as listed by Bureau of Emigration and Overseas Employment records (Gilani, 2008).

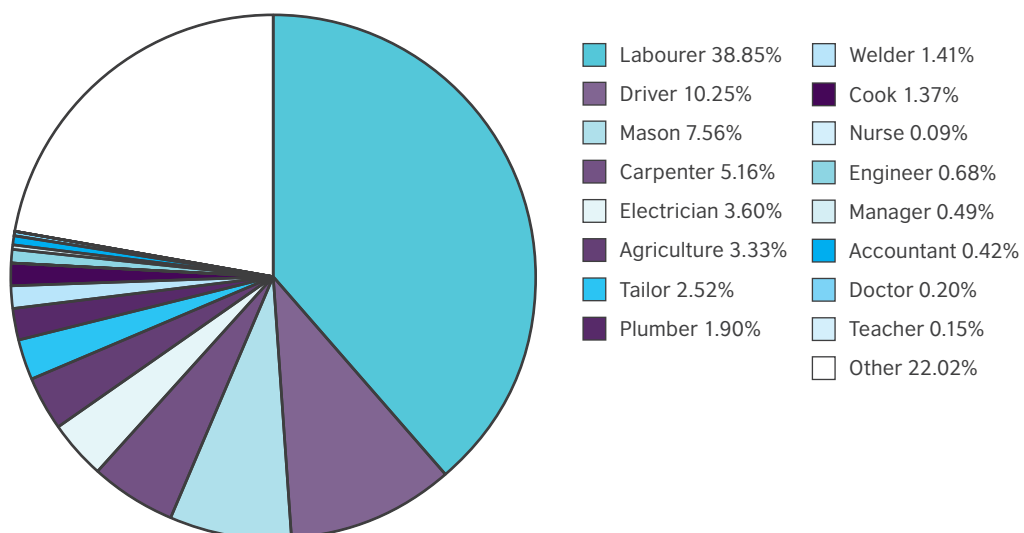
**Number of Pakistanis overseas by blue collar category during 1971–2015
(Bureau of Emigration and Overseas Employment, 2015)**

CATEGORY	TOTAL EMIGRANT WORKFORCE 1971–2015	BLUE COLLAR WORKER AS A PERCENTAGE OF TOTAL EMIGRANTS INCLUDING ALL WORK CATEGORIES
Labourer	3,250,207	38.85%
Driver	857,803	10.25%
Mason	632,071	7.56%
Carpenter	431,555	5.16%
Electrician	301,306	3.60%
Agricultural worker	278,175	3.33%
Tailor	210,888	2.52%
Plumber	158,677	1.90%
Welder	118,055	1.41%
Cook	114,442	1.37%
Nurse	7,686	0.09%

Number of Pakistanis overseas by white collar category 1971–2015
(Bureau of Emigration and Overseas Employment, 2015)

CATEGORY	TOTAL EMIGRANT WORKFORCE 1971–2015	WHITE COLLAR WORKERS AS A PERCENTAGE OF TOTAL EMIGRANTS INCLUDING ALL WORK CATEGORIES
Engineer	57,137	0.68%
Manager	40,847	0.49%
Accountant	35,135	0.42%
Doctor	17,029	0.20%
Teacher	12,269	0.15%

Figure 13: Number of Pakistanis overseas by category 1971–2015
(Bureau of Emigration and Overseas Employment, 2015)



Source: Bureau of Emigration and Overseas Employment, 2015.

APPENDIX C

Occupations with ceilings for Australia (Australian Government, 2015)

WHITE COLLAR	CEILING 2015–16	BLUE COLLAR	CEILING 2015–16
Secondary school teachers	8,352	Registered nurses	13,872
Construction managers	5,640	Electricians	8,772
Software and applications programmers	5,364	Metal fitters and machinists	8,070
General practitioners and resident medical officers	3,558	Carpenters and joiners	7,290
Solicitors	3,252	Motor mechanics	6,108
Civil engineering professionals	2,970	Plumbers	5,130
Computer network professionals	1,986	Structural steel and welding trades workers	4,416
Electrical engineers	1,230	Chefs	2,475
Medical imaging professionals	1,092	Air-conditioning and refrigeration mechanics	1,038
Electronics engineers	1,000	Civil engineering draughtspersons and technicians	1,000
Telecommunications engineering professionals	1,000	Electrical engineering draughtspersons and technicians	1,000

Occupations in demand in Canada
WHITE COLLAR

Human resources managers
 Telecommunication carriers managers
 Engineering managers
 Computer and information systems managers
 Managers in healthcare
 Corporate sales managers
 Financial auditors and accountants
 Civil and mechanical engineers
 Computer engineers (except software engineers and designers)
 Electrical and electronics engineers

BLUE COLLAR

Civil engineering technologists and technicians
 Mechanical engineering technologists and technicians
 Electrical and electronics engineering technologists and technicians
 Electrical power line and cable workers
 Chefs
 Structural metal and platework fabricators and fitters
 Electricians (except industrial and power system)
 Telecommunications line and cable workers
 Plumbers
 Carpenters

Occupations in demand in UAE
WHITE COLLAR

Accountants
 IT professionals
 Programmers
 Web designers
 Health sector professionals
 Engineers
 Banking and finance sector professionals

BLUE COLLAR

Hospitality industry, hotel staff
 Construction industry staff: masons, plumbers, electricians etc.
 Crane operators, welders, fabricators
 IT technicians
 Accounting bookkeepers/accounting technicians
 Agricultural workers
 Riggers

Occupations in demand in Saudi Arabia

WHITE COLLAR

Chartered accountants
Architects
Professors, lecturers
Civil and mechanical engineers
Doctors
Electrical, petrochemical and computer engineers
Banking and finance sector managers

BLUE COLLAR

Accountants/accounting technicians
Oil industry staff: riggers etc.
Fabricators
Accounting technicians
Paramedical staff
Hospitality industry hotel staff
Labourers, construction industry staff, masons, plumbers, electricians etc.

Occupations in demand in Oman

WHITE COLLAR

Accountants
HR professionals
Professors, lecturers
Civil, structural and mechanical engineers
Doctors
Electrical and computer engineers
IT professionals

BLUE COLLAR

Accounting technicians
Machinery mechanics, operators
Fabricators
Draftsman, surveyors
Paramedical staff
Riggers
Construction industry staff, masons, plumbers, electricians, carpenters, painters etc.

APPENDIX D

Job Search.com Ltd [GB] <https://www.oilandgasjobsearch.com/Oil-and-Gas-Jobs/Cost-Manager-Jobs/DEPUTY-HSE-MANAGER-KUWAIT/Details/1144313>

ouncil IELT... Suggested Sites

DEPUTY HSE MANAGER KUWAIT job in Kuwait

f t w e +

Apply

natural resources

View all jobs by Natural Resources

Rate

Type Permanent

Location Kuwait

Region

Town

Required Residency

Posted By Natural Resources

Date Posted 02 Feb 2016

Expiry Date 31 Mar 2016

Job Reference

Job Description **Natural Resources are seeking to recruit for their client (an international construction company) an Deputy HSE Manager for a Clean Fuel Project based in Kuwait on a long term contracts – please note client will only accept candidates who have the following experience/qualifications:-**

1. *Education Qualifications: Four year full time Degree in Bachelor of Science in Engineering from recognized and reputed University.*
2. *Minimum 15 years' experience in the field of HSE in any core industries like refineries, Petrochemicals, fertilizers, EPC Projects or heavy chemicals.*
3. *Engineers with the following additional qualifications/Certifications will be preferred:*
 - NEBOSH Diploma / NEBOSH Certificates
 - Industrial Safety Diploma
 - Professional qualification like CSP/CMIOSH


Source: Oil and Gas Job Search

<https://www.oilandgasjobsearch.com/Oil-and-Gas-Jobs/Cost-Manager-Jobs/DEPUTY-HSE-MANAGER-KUWAIT/Details/1144313>

HSE Manager

Manpower Middle East - Dubai, UAE

Date Posted: 2015/12/29



ManpowerGroup™

[Email to Friend](#) [Send Me Similar Jobs](#) [Apply Now](#) [Report Abuse](#)

Job Description

Our client, one of the world's leading construction contractors company is seeking to recruit an HSE Manager for the Doha project.

Duties will include:

- Oversee and enforce the implementation of Contractor's Safety Program and manage all safety engineers and officers, including Sub-Contractor's HSE staff.
- Set safety goals, such as man hours worked without a lost time accident, and implement a safety incentive program to motivate safe behavior.
- Inspect the Project daily, and record all visible safety hazards, including identification of violators.
- Check all areas at least once a day for housekeeping and cleanup. Take immediate action to ensure compliance with requirements.
- Ensure training is carried out for specific tasks, especially work of a "non standard" nature.

Skills

Minimum 7 years of experience as HSE Manager AND certified in any of the following:

- Ideally Diploma holder, Western Expat.
- Must be able to tackle TIME Qatar

(Turner International).

MANDATORY: Any of the certificates - CSP (Certified Safety Professional), NEBOSH Level 8, NVQ Level 4, MIOSH (Member of IOSH), CRSP (Canadian Registered Safety Professional) etc

Source: www.bayt.com/en/job/hse-manager-in-uae-3434980/

URGENTLY REQUIRED FOR QATAR

Applications are invited for working on infrastructure projects in Qatar. Gulf experience for all categories preferred.

S.#	Designation	Position	Experience & Qualification
1.	Project Manager Earthwork	01	B.Sc. / B.E Engineer with 15 years extensive experience in Earthwork projects.
2.	HSE Manager	01	B.Sc./B.E Engineer with International qualifications like CSP (Certified Safety Professional), NEBOSH Level 6, NVQ Level 4, MIOSH (Member of IOSH), CRSP (Canadian Registered Safety Professional) etc. 15 Years of experience required.
3.	QA/QC Manager	01	B.Sc. B.E with additional qualifications and training pertaining to Quality Management. 15 Years of experience required.
4.	HSE Engineer	01	B.Sc. / Diploma in Engineering with advanced safety Management Diploma / International qualifications like NEBOSH Level 3, OSHA #500, etc. 10 Years of experience required.
5.	HSE officers	04	Degree in Science / Diploma in Engineering with safety diplomas / certificate courses / International qualifications like IOSH Managing Safety, OSHA 30 hrs etc. 5 Years of experience required.

PE(R) 15295
Date: 8/10/2014



Kindly send your CV's with recent photo at:
hr@redcointl.com, redcopakistan@gmail.com
Tel: +974 44415426, Fax: +974 4441 3786

Source: Local Newspaper

HEAD OF SAFETY AND SECURITY / HSE Manager

A highly reputed local group in Qatar is looking for a "Head of Safety and Security / HSE Manager" for their property management division. The applicant should be Bilingual with minimum Engineering graduation and NEBOSH certification and with minimum 15 years experience in the property management industry.

Send in CV with copies of certificates to
abdjaleels@gmail.com

Source: www.thegulfrecruitmentgroup.com



Pakistan Petroleum Limited

Career Opportunity

Pakistan Petroleum Limited, a frontline Exploration and Production company for over six decades, is looking for suitable persons for the following positions:

HSE ADVISOR FOR DRILLING (ON CONTRACT AT LAKKI MARWAT)

Qualification & Experience
Master's degree in Environmental Science, with 2 years of relevant experience with E&P companies.

Job Profile / Specifications

- Able to implement company's HSE policy / standards and guidelines on Drilling Rig.
- Capable of assisting Drilling Operations in meeting HSE objectives and HSEMS matters.
- Local of Lakki Marwat possessing NEBOSH International General Certification and ISO 14001/ QHSAS 18001 Lead Auditor certificates will be preferred.

ADMINISTRATIVE SUPPORT ASSISTANT (ON CONTRACT AT ISLAMABAD OFFICE)

Qualification & Experience
Bachelor's degree in any discipline with minimum 5 years of relevant experience.

Job Profile / Specifications

- Proficient in using computer, particularly MS office.
- Able to provide support in general administration.
- Able to provide Secretarial Assistance to the Senior Management and perform reception duties.
- Women will be given preference.

Interested individuals may apply through PPL website at:
<http://www.ppl.com.pk/content/management-jobs>
latest by **December 17, 2015**.

Source: Local Newspaper

APPENDIX E

Course providers for UK exams in Pakistan

REGION	EXAM BODY	AREA
Lahore	ACCA	Finance and accounting
Islamabad	ACCA	Finance and accounting
Karachi	ACCA	Finance and accounting
Lahore	BPP	Law
Islamabad	BPP	Law
Karachi	BPP	Law
Lahore	CIPS	Supply chain and procurement
Islamabad	CIPS	Supply chain and procurement
Karachi	CIPS	Supply chain and procurement
Lahore	GMC, MRCS, FRCS	Medicine
Islamabad	GMC, MRCS, FRCS	Medicine
Karachi	GMC, MRCS, FRCS	Medicine
Lahore	ICAEW	Finance and accounting
Islamabad	ICAEW	Finance and accounting
Karachi	ICAEW	Finance and accounting
Lahore	Institute of Commercial Management	Commercial management

PROFESSIONAL QUALIFICATIONS – OPPORTUNITIES FOR GROWTH IN PAKISTAN

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REGION	EXAM BODY	AREA
Islamabad	Institute of Commercial Management	Commercial management
Karachi	Institute of Commercial Management	Commercial management
Lahore	IWCF	Petroleum/drilling
Islamabad	IWCF	Petroleum/drilling
Karachi	IWCF	Petroleum/drilling
Lahore	LEEA	Lifting equipment
Islamabad	LEEA	Lifting equipment
Karachi	LEEA	Lifting equipment
Lahore	NEBOSH	Health and safety
Islamabad	NEBOSH	Health and safety
Karachi	NEBOSH	Health and safety
Lahore	UOL	Law
Lahore	UOL	Finance and accounting
Lahore	UOL	MIS
Lahore	UOL	Business and management
Lahore	UOL	Economics and management
Lahore	UOL	IR
Islamabad	UOL	Law

PROFESSIONAL QUALIFICATIONS – OPPORTUNITIES FOR GROWTH IN PAKISTAN

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REGION	EXAM BODY	AREA
Islamabad	UOL	Finance and accounting
Islamabad	UOL	MIS
Islamabad	UOL	Business and management
Islamabad	UOL	Economics and management
Islamabad	UOL	IR
Karachi	UOL	Law
Karachi	UOL	Finance and accounting
Karachi	UOL	MIS
Karachi	UOL	Business and management
Karachi	UOL	Economics and management
Karachi	UOL	IR

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