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# ► Barriers to Effective Labour Mobility in the African Leather Industry



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# Barriers to Effective Labour Mobility in the African Leather Industry

*Responses, Challenges  
and Opportunities*

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# ► Preface and acknowledgements

The International Labour Organization (ILO) and its Joint Labour Migration Programme (JLMP) partners commissioned this research to investigate the potential role of skills recognition and, more particularly, the recognition of prior learning (RPL) in facilitating the access of migrant workers to employment opportunities, specifically in leather sector occupations. The research provides insights into the scope and characteristics of mobility and migration among migrants seeking work in the leather sector, as well as the circumstances relating to mobility and migration that would justify implementation of RPL projects.

Within this context, the three-year JLMP Priority Project (2018-2021) was developed with the overall objective of improving the governance of labour migration and so achieving safe, orderly and regular migration in Africa in accordance with the relevant frameworks of the African Union (AU) and Regional Economic Commissions (RECs), as well as relevant international human rights and labour standards and other cooperation processes.

Under the JLMP Priority Project, the International Labour Organization (ILO), together with the African Union Commission, appointed JET Education Services to conduct a “Study of current barriers to effective labour mobility in the African leather industry in eastern, northern and western Africa”.

The report was made possible by the generous sharing of knowledge and information by the governments of Côte d’Ivoire, Ethiopia, Ghana, Kenya, Rwanda and South Africa, and social partners in these States, and of migrant participants in Kenya and South Africa.

Special thanks go to Sylvia Cormaci, Natalia Popova, Mariette Sabbatier, Bethelhem Tesfaye Kassa, and Iskandar Kholov, from the ILO, for overall guidance, technical comments on drafts and oversight. Our thanks also to skills colleagues Paul Comyn and Christine Hofmann for their inputs and feedback. The contribution of project partners - Oumar Diop and Emily Molokwu of the African Union and Catherine Matasha and Edwin Righa of the International Organization for Migration (IOM) - are gratefully acknowledged. Thanks also to colleagues from the African Union, the IOM, the ILO and social partners who attended and contributed to the validation meeting in November 2021.

Collegial interactions took place with colleagues from the Africa Leather and Leather Products Institute (ALLPI), including Mekonnen Hailemariam, Preston Viswamo, Awlache Sintie, Harrison Mungai and Michael Kiraye. The ALLPI was concurrently conducting a survey of “Programs and Qualifications for Skills Recognition and Development in the Leather Sector in Africa”.

This report was commissioned by the International Labour Organization (ILO) and produced by JET Education Services researchers: Andrew Paterson, Hazel Mugo, Hoosen Rasool, Zaahedah Vally, Zahraa McDonald, Patrick Molokwane, Katherine Morris and James Keevy.

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Reviewer: Emmerentia Erasmus

Editing: Maureen Mosselson

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## Acronyms and abbreviations

<b>ACQF</b>	African Continental Qualifications Framework
<b>ALLPI</b>	Africa Leather and Leather Products Institute
<b>AMU</b>	Arab Maghreb Union
<b>AU</b>	African Union
<b>AUC</b>	African Union Commission
<b>CMP</b>	Common Market Protocol
<b>COMESA</b>	Common Market for Eastern and Southern Africa
<b>COTU-K</b>	Central Organization of Trade Unions (Kenya)
<b>EAC</b>	East African Community
<b>EAQFHE</b>	East African Qualifications Framework for Higher Education
<b>EATUC</b>	East African Trade Union Confederation
<b>ECOWAS</b>	Economic Community of West African States
<b>GDP</b>	Gross domestic product
<b>GIZ</b>	Deutsche Gesellschaft für Internationale Zusammenarbeit
<b>IGAD</b>	Intergovernmental Authority on Development
<b>ILO</b>	International Labour Organization
<b>IOM</b>	International Organization for Migration
<b>JLMP</b>	Joint Labour Migration Programme
<b>KAM</b>	Kenya Association of Manufacturers
<b>KITP</b>	Kenya Industrial Transformation Programme
<b>KLDC</b>	Kenya Leather Development Council
<b>KNQA</b>	Kenyan National Qualification Authority
<b>KSh</b>	Kenyan Shillings
<b>MGSoG</b>	Maastricht Graduate School of Governance
<b>MSMEs</b>	Micro, small and medium enterprises
<b>NBCLI</b>	National Bargaining Council of the Leather Industry
<b>NGO</b>	Non-governmental organization
<b>NQF</b>	National qualifications framework
<b>REC</b>	Regional economic community
<b>RPL</b>	Recognition of prior learning
<b>SADC</b>	Southern African Development Community
<b>RQF</b>	Regional qualifications framework



<b>SADCQF</b>	SADC Qualifications Framework
<b>SAQA</b>	South African Qualifications Authority
<b>SMEs</b>	Small and medium-sized enterprises
<b>TVET</b>	technical and vocational education and training
<b>UN</b>	United Nations
<b>UNCTAD</b>	United Nations Conference on Trade and Development
<b>UNDESA</b>	United Nations Department of Economic and Social Affairs
<b>UNHCR</b>	United Nations High Commission for Refugees
<b>UNIDO</b>	United Nations Industrial Development Organization
<b>USD</b>	United States Dollar





# ▶ Executive summary

## ▶ Background and approach

Leather-related occupations were selected for this research because the African leather sector has been identified as an important potential contributor to the future expansion of African manufacturing, given the sector's strategic advantages, such as local access to plentiful supplies of quality hides. Following a carefully planned stratified approach taking into account COVID-19 restrictions and the paucity of data available when the fieldwork was to be conducted, **Ghana, Côte d'Ivoire, Ethiopia, Rwanda, South Africa and Kenya were selected for the initial phase of the project, followed by more detailed case study analyses conducted in South Africa and Kenya.**

The **research design of this project consisted of three main phases.** Firstly, an online country preview was conducted remotely, by contacting and interviewing leather sector participants over the telephone in the public and private sectors of each of the six selected countries. This was followed by in-country *profiling* in the six countries, with the aim of generating a profile of the leather sector of each country in terms of its current growth and employment capacity, and also of identifying the numbers and significance of migrant workers in each country. The third phase involved in-country *case studies* in two countries: South Africa and Kenya.

A framework was developed to capture the occupational structures of the leather manufacturing sector, reflecting how the occupational roles and structure of this relatively labour-intensive sector have adapted under the influence of technology in developing contexts. This shows how **the leather manufacturing labour market generates conditions in which low-skilled, medium-skilled and high-skilled migrant workers are treated differently in terms of access and working conditions.** The research also investigated skills demand and skills recognition opportunities available in the countries concerned. The legislation governing access to a particular country, as well as the labour legislation that directly influences the quality of labour migration and access to decent work, is also mapped. This information provides a structure enabling us to compare aspects of governance that directly and indirectly impact labour migrant mobility into and within each of the six destination countries.

## ▶ Country profiles

The **country profiles** are based on 61 semi-structured interviews of stakeholders (e.g. manufacturing and tanning enterprises and associations, employers, training providers, government departments, producer cooperatives and international agencies). Subsequently, 30 **semi-structured migrant worker interviews** were conducted in South Africa (19) and Kenya (11).

**Ghana:** the country has a high presence of migrant workers, with most of them tending to originate from member countries of the Economic Community of West African States (ECOWAS), including Nigeria, Togo, Burkina Faso, Niger and Côte D'Ivoire. This is mainly because the ECOWAS Free Movement Protocol provides visa-free opportunities for citizens of West African countries to access opportunities in other member states. Some migrant workers originate from the Asian region, notably China. Migrant workers tend to possess varying levels of skills, from low to middle (technical) to high. Those engaged in the oil and gas, construction and health sectors tend to be highly skilled, in contrast to those in informal trading activities, characterized by greater numbers of

low-skilled migrants. Where the leather sector is concerned, it is evident that many migrant workers active in this sector originate from neighbouring West African countries, the majority being males. They tend to participate in the wholesaling and retailing of various leather products, processing and, to a lesser extent, manufacturing. They are mostly self-employed or owners of small leather enterprises. They tend to employ local workers. Most migrant leather sector workers are found in the city of Kumasi, considered to be the hub of the leather industry in Ghana. Others are found in Accra, Takoradi and the northern region of the country. Despite a lack of recognition, Ghana's leather sector offers considerable scope for employment and poverty reduction, not only for local workers but also for migrants. However, there is not much evidence-based research on the leather industry and its value chain, nor of the participation of migrant workers therein.

**Côte d'Ivoire:** The leather sector in Côte d'Ivoire operates mainly within the informal economy. Migrants in the sector originate primarily from Ghana and Senegal, and to a more limited extent from Niger, Mali and Burkina Faso. Ivorian leather artisans indicated that they had been trained either by a migrant worker or by an Ivorian leather worker who had himself been trained by a migrant. The number of Ivorian artisans working in the field is increasing. The cities and towns most closely associated with leather work in Côte d'Ivoire are Abidjan (especially Treichville, a commune of Abidjan), Daloa (a city in central-western Côte d'Ivoire, famous for its leather sandals) and Korogho (to a lesser extent).

**Ethiopia:** Ethiopian businesses work in partnership with Chinese migrants for technical support and to get information on the needs of their customers and so ensure that production is demand-driven. There are individuals from China working informally and producing leather products, which they sell in Merkato, the biggest market in Ethiopia. They support each other with technology transfer. There are indications that Chinese producers of high-quality work could exploit opportunities for exporting their products to neighbouring countries, such as Uganda and Eritrea. Individuals from Somalia and Kenya have attended short-term training at the Ethiopian Leather Development Institute and have been certified in leather technology.

**Rwanda:** Our field research indicated that the proportion of migrant workers employed in the leather sector in comparison with other economic sectors is not significant, because the leather industry is in its early stages. Four companies are involved in processing, but they employ few migrant workers. Abattoirs and tanneries are owned by locals. Migrant leather workers originate mainly from Kenya, China and India. They come from these countries in a large number because they are highly skilled: Chinese and Indians are the most highly skilled in processing and manufacturing, while Indians are believed to be the most skilled in green technologies and Kenyans in entrepreneurship. Migrant leather workers tend to occupy managerial and production manager positions or they are employed in middle-level technical jobs, especially those who come from Africa. The field research also revealed that companies employing migrant leather (processing) workers tend to be located in the Kigali Industrial Zone and the Bugesera Industrial Zone, and the workers are scattered among the local population; they do not form a specific community. Furthermore, migrant workers tend to enter the country for the general purpose of finding a job and a small number end up in the leather sector.

**South Africa:** At the present time, the leather industry in South Africa focuses mainly on local demand. In the footwear sub-sector, for example, the main product streams are industrial leather, school shoes and fashion footwear, with the fashion segment declining somewhat due to straightened financial circumstances as domestic consumers focus more on value than on choice of footwear. Local consumption accounts for 20 per cent of local production. The South African leather sector is "an old industry so higher-level jobs are sourced locally", but it was also observed that an "investor from China will bring their own high-level skilled nationality [sic] to occupy supervisory positions here in South Africa". Non-African migrants are permitted to be employed at higher skills levels under arrangements linked to foreign investment, but the numbers are smaller than in, for instance, Ethiopia. Transfer of skills is expected to take place through shadowing or mentoring. The South African leather industry, especially medium and large producers, has experienced various

stages of technology integration. The Fibre Processing and Manufacturing (FP&M) Sector Education and Training Authority (SETA) has made progress in introducing RPL. The SETA has established a Footwear Community of Expert Practitioners, inviting experts to participate in the RPL process. In the future, entry to a programme is likely to involve RPL in addressing generic leather skills requirements. The Quality Council for Trades and Occupations (QCTO) is taking ownership of occupationally driven qualifications and will be responsible for creating accreditation processes and establishing assessment centres for leather and other sectors.

**Kenya:** The Kenyan leather and footwear sector comprises three sub-sectors: tanneries, manufacturers of footwear and leather goods manufacturers (KAM 2020). The sector relies on the country's livestock population for its supply of leather industry inputs. Kenya is said to have the third highest livestock population in Africa, after Ethiopia and Botswana (Onyango et al., 2019), providing a wealth of raw materials for use in leather and leather goods manufacturing (KAM 2020). In the leather sector, highly skilled workers constitute the minority, whereas low-skilled workers form the majority in the informal sector. Participants stated that low-skilled workers tend to originate from East Africa, in particular Rwanda, Tanzania and Uganda. They also highlighted that Somali migrant workers come mainly as investors, setting up businesses in the leather sector, as well as in technology, electronics and the fashion industry. Significantly, the participants interviewed stated that only 2 per cent of migrant workers are employed in the leather sector. However, it is generally acknowledged that migrants can add value to the leather industry in Kenya, and that they require more opportunities for employment and upskilling so they can contribute constructively to the Kenyan economy. Further initiatives to create opportunities for migrants, women and youth are required to ensure greater equality in Kenya's labour market.

## ► Comparative analysis, drawing mainly on the South Africa and Kenya case studies

Before entering the leather sector in the country of destination, **very few migrants had received formal training** culminating in certification as proof of skills and qualifications.

Lack of economic opportunities or instability (**push factors**) in the country of origin leads migrant workers to South Africa or Kenya in search of jobs (**pull factors**).

The **role of family and kinship** as a vehicle of migration and circulation between countries is apparent in the experiences of participants in all geographical areas. Some participants have a family presence in both countries, into which new generations are introduced. Families and reciprocal kinship networks can provide initial and, at times, ongoing support to migrant workers. Notably though, some participants have migrated without any support.

The extent of **economic vulnerability** (and level of skills) impacts on willingness to accept any job. In other words, the greater the willingness of a migrant to accept any offer of employment, the more economically vulnerable and lacking in skills the migrant is likely to be. Certification could encourage migrants to try to find work with higher wages and better working conditions; however, the informality of enterprises offering them employment and their undocumented status could stand in the way of their intention to engage in work where their skills are optimally utilized.

**Migrants tended to work without employment contracts.** Most migrant workers interviewed were self-employed or worked in a family business without contracts. Half the migrants in Pietermaritzburg in South Africa who were employed by formal businesses worked without contracts.

**A minority of participants interviewed had a certificate in their possession** that provided formal recognition of their leather-working skills. A similar experience is recounted by female migrant respondents in South Africa (Ncube et al. (2020, 8)

Low-skilled migrant workers in South Africa and Kenya were mostly **willing to accept almost any precarious job** on first arrival. Migrant workers' preparedness to accept low-quality jobs (Eurofound and International Labour Organization, 2019) indicates limited resources to bear the opportunity cost of a longer search for better employment opportunities. It also demonstrates their being at a disadvantage when negotiating wage rates. (Todorova & Dzharova, 2010)

### Key findings

The structure of the leather sector labour market in terms of the skills profile of migrant leather workers is clearly segmented, **split between high-skilled and low-skilled migrants**. This segmentation generates quite different patterns of treatment and employment outcomes. Low-skilled international migrant workers tended to experience high barriers to entry, while high-skilled migrants experienced low entry barriers.

Skills level	Role	Qualifications and skills	Migrant origin	Sector	Contract	Access route	Barriers to entry
High skills	Manager	Formal occupational professional qualifications	Non-African or African	Formal	Fixed term	Employer negotiates visa and work permit pre-arrival	Low
	Supervisor						
	Tanning chemist						
	Production engineer						
Mid-to high level	Technician or Technologist that installs new machinery and trains local operators	Formal vocational qualifications	Non-African or African	Formal	Short term	Employer negotiates visa and work permit pre-arrival	Low
Mid to low level	Artisan medium-skilled	Formal, non-formal; informal	African	Informal/formal	Can vary	Regular or irregular	High
Low/basic skills	Production tasks: operate manual machines	Formal, non-formal; informal	African	Informal/formal	Monthly, weekly or daily	Regular or irregular	High

**Leather goods and footwear production straddles a diversity of production environments and skills configurations.** Enterprises configure the tools, resources, machinery, technologies and materials at their disposal to optimize their product outputs. Access to electricity, basic leather-working tools, powered stitching machines and, lastly, automated and digital machines is very unevenly distributed within African countries. How these factors are incorporated into a production scenario will determine what skills are required and how these skills are deployed across the leather-manufacturing activities.



**A marked proportion of migrant workers – that could not be quantified – find employment with informal-sector employers through existing family and kinship networks.** While these links open access to the initial prize of employment, they do not necessarily guarantee fair wages or working conditions. Migrants who work through networks are substituting networks for labour market information. This may offer a modicum of security, but with limited benefits.

Of the thirty low-skilled migrant workers in South Africa and Kenya who were employed as leather sector workers at the time of the interview, only **a small proportion had intended to or wanted to work in the sector on arrival.** A high proportion initially became leather workers as a matter of necessity, rather than choice. It is noteworthy, however, that substantial numbers had remained in the sector over periods of five years or more, although this finding is based on a small sample of interviews in the two countries. Comparison with technical and high-skilled workers employed in formal leather sector enterprises is likely to show that a much higher proportion had intended to work in the sector.

## ► Opportunities for RPL interventions in the context of low-skilled migration

Of the countries participating in this study, RPL for migrants currently working in the destination country was not in evidence.

Unlike other factors influencing a migrant to target a position, RPL can be thought of more as an opportunity that a migrant might take up. However, a migrant cannot make an assessment about whether RPL might be in her/his interests without the existence of RPL in the country, coupled with an understanding of what RPL consists of and the benefits it offers. Since RPL programmes in most African contexts target national populations, the participants interviewed **displayed no general awareness of RPL.**

A leather worker with an RPL certificate would expect to find employment, subject to going rates, in the formal labour market. In the informal labour market, formal qualifications, though they may be relevant, do not necessarily have the same kind of purchase. **Informal-sector employers are relatively indifferent to the value of qualifications, especially at low-skills levels, where scarcity is not a factor.** Conceivably, a migrant worker in the informal sector, having completed an RPL programme, might then seek employment in the formal sector. However, in the case of a migrant whose status is irregular due to their lacking a valid identification document and work permit, the possession of a qualification would not overcome this barrier.

From the participants interviewed in South Africa, it is apparent that most low-skilled migrant workers who ended up working in the leather industry had no specific intention or desire to take up work in the sector. Furthermore, a majority had no prior experience of working in leather and were prepared to take up any job to earn an income. This suggests that **offering RPL to migrant workers with only limited experience in the leather sector may not be effective as they lack occupational experience to build on.** The existence of labour migration policies and measures is highly relevant to the outcome of RPL initiatives, particularly those enabling migrants to achieve documented migrant status. Possibilities for implementing labour migration governance mechanisms, for instance bilateral agreements between origin and destination countries covering specific sectors, could be considered if there is an interest in doing so.

## ► Policy implications

A key factor with powerful implications is whether a migrant arrives on a documented or undocumented track. Providing more equitable and regular opportunities for migrants to be documented is therefore important. **Research comparing documented and undocumented tracks is needed.** Since undocumented status leads to a migrant taking up informal employment, the currency or value of RPL for mobility is reduced. It is therefore important to have the right migration and employment policies in place.

A diversity of production environments could potentially provide working opportunities for migrants. One challenge – relating to information and skills matching – would be to find ways of linking migrants having low-level skills with the appropriate production environment and opportunities for skilling, re-skilling and upskilling. **In such a complex environment, where enterprise production lines and the skills needs are diverse and unique, creating an RPL certificate might be difficult to achieve.** Two recommendations may be appropriate here: first, to explore how RPL could facilitate transition to formal employment for migrant workers; and second, to consider the role of public employment services in skills matching and implementing labour migration schemes.


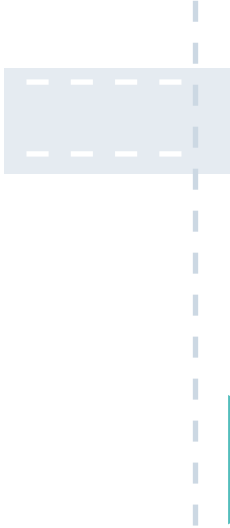
The fact that many leather workers retained their roles over substantial periods of five years or more implies either a commitment to having a secure income or a lack of incentive to seek alternative employment or alternative job opportunities. **This desire for stability of tenure could be built on by offering targeted access to a combination of RPL and skills development,** thus opening mobility options for work in more formal settings. This possibility could be investigated further.

Expanding this study to cover further sectors able to absorb numbers of migrant workers, and taking on board skills needs at all levels, may be useful for labour migration governance. **Establishing common conditions could support cross-sectoral interventions,** which, if scaled up, would be more cost-efficient and result in better skills matching, nationally and internationally. For example, a common core skill such as stitching, which is shared by occupations in more than one sector (garment manufacture, leather garment manufacture and furniture upholstery), might be selected for RPL and training as a cross-sectoral occupation, facilitating workers' access to employment opportunities in several sectors.

## ► Concluding comments

The findings of the study strongly suggest that at present **RPL can, at best, provide only a modest contribution in enabling migrant workers to access employment opportunities in the leather industry in the countries covered by this study.** The leather sector, as with many similar sectors on the continent, is strongly impacted by high levels of informality and segmentation, resulting in different patterns of treatment and employment outcomes. This situation is likely to improve in countries experiencing growth and demand for labour, especially in the formal leather sector.

The **enabling policy environment** currently being created by the Protocol on Free Movement of Persons (2018), the African Continental Free Trade Area (AfCFTA) (2018) and the African Continental Qualifications Framework (ACQF) (2021) should not be underestimated. These policy instruments provide important foundational elements for a more integrated system of skills recognition in Africa. It will take time to impact sectors with high levels of informality, such as the leather sector, but ultimately this will happen. We strongly recommend that the JLMP be more closely aligned with the ACQF process, which is currently managing a wide range of pilot projects in consultation with the African Union Commission (AUC), the JLMP and member states, in order to ensure coherence and sustainability.



# 1

## Chapter 1 Introduction

### ► Background

International migration “covers only migration between countries, that is, migrants are defined as those who cross international boundaries for the purposes of employment and does not include those workers who move within a country for the purposes of employment” (ILO 1999). The International Organization for Migration (IOM 2018) cites the three main drivers of migration: economic and demographic factors, such as poverty and food insecurity; environmental change, such as drought and flooding; and man-made crises, such as unrest due to war and political instability. Expert studies and available curated data strongly indicate that migration, in particular labour migration, is an important consequence of regional integration and African economic development, as well as a key enabler in this regard (ILO 2021). While migration which is well-managed can bring significant benefits for countries of origin and destination, and for migrant workers themselves, a lack of adequate governance can result in the foregoing of development benefits and violations of migrant workers’ rights (UNCTAD 2018).

Restricted mobility<sup>1</sup>, failure to apply Regional Economic Community (REC) free movement regimes and limited implementation of regional and national qualification frameworks all inhibit links between skills, labour markets and employers. Qualifications obtained in one country may not be accepted across the border in another country, which constrains the international portability of skills and labour mobility. However, the Protocol on Free Movement of Persons adopted by the African Union (AU) Heads of States and Government Summit in Addis Ababa in January 2018 makes provisions for labour migration through mobility and skills recognition. The African Continental Qualifications Framework (ACQF) currently being implemented is designed to enhance the comparability and transparency of qualifications across education and training systems and to facilitate recognition of diplomas and certificates, thereby advancing skills recognition and portability (AUC 2021). In addition, there are ongoing efforts to develop regional qualifications frameworks (RQFs).

The International Labour Organization (ILO) and its Joint Labour Migration Programme (JLMP) partners commissioned this research to investigate the potential contribution of skills recognition and, more particularly, recognition of prior learning (RPL) in facilitating the access of migrant workers to employment opportunities, specifically in leather sector occupations. These occupations were selected for this project because the African leather sector has been identified as an important contributor to the future expansion of African manufacturing, having strategic advantages such as local access to plentiful supplies of quality hides. In this context, RPL is considered to have value in ensuring adequate skills matching and skills portability for migrant leather workers.

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<sup>1</sup> International labour mobility is defined as “temporary or short-term movement of persons across countries for employment-related purposes in the context of the free movements of workers in regional economic communities” (ILO 2018, 2).

This research therefore has the following main objectives: first, it sheds light on the scope and characteristics of mobility and migration among migrant workers in the leather sector. The focus on the leather sector, which comprises a unique set of occupations, necessitated a design making it possible to identify and differentiate the migration pattern of leather workers from broader patterns of labour migration in terms of volumes, directions and destinations. In the request for proposals (RFP), it was observed that “whilst there is anecdotal evidence that labour mobility exists in the sector, particularly for tannery technicians and engineers, there has been no structured labour market analysis to determine the exact nature and scope of labour mobility” (ILO 2020c, 23).

The research also sheds light on circumstances relating to mobility and labour migration that would justify implementation of RPL projects, as well as identifying situations where RPL systems would be less effective. It therefore provides insight into the place of RPL in relation to the various factors that positively contribute to migrant workers’ mobility and those that have less powerful effects.

## ► The leather sector labour market context

The main aim of this introductory chapter is to present the key characteristics of the leather sector labour market as it has developed on the African continent. This is an important starting point, as migration on the part of leather workers takes place in the context of the leather sectors and labour markets of 54 sovereign states. The national labour markets between which migrant workers move, and more specifically the leather labour markets, present migrant workers with both challenges and assistance in their efforts to exploit the opportunities to acquire sustainable and decent employment in destination countries. At the centre of this research project is the need to understand destination countries’ environments in terms of the freedom they accord migrant workers to exploit their mobility options.


The options for migrant workers to access a destination country’s labour market, in this case its leather labour market, can be defined in terms of the characteristics of the migrant him or herself and the characteristics of the destination country’s labour market. It will be argued that a migrant worker’s mobility must be considered not only in the context of the labour market but also of other barriers to and benefits of living and working in the destination country: personal safety, employer fairness, access to labour market information, medical care and so on. This chapter describes how leather labour markets have evolved in terms of their demand for labour and specific types of skills. It draws attention to the diversity of enterprise environments, where demand for skills is heavily influenced by the use of technology in leather production. Such conditions vary between formal and informal sector enterprises and are central to an analysis of leather worker mobility in destination countries.

## ► Diversity of leather manufacturing and diversity of skills demand

The diversity of the skills demanded increases through the various segments of the leather sector value chain, from the limited skills required for harvesting hides and skins to those required for tanning, manufacturing leather goods and manufacturing footwear. The complexity of production requires a wide range of occupational skills. The most technically demanding and economically rewarding occupation is the manufacturing of footwear. The table below presents an overview of the skills demanded across the leather sector. Most jobs in tanning, processing and finishing call for low- and medium-skilled labour. Leather technicians and technologists involved in directing the physical and chemical processes of tanning are a relative minority, while production management and other professional skills (such as chemical engineering) account for only a small fraction of overall tanning skills demand. In this sphere of manufacture, there is comparatively less variation in the processes requiring specific skills.

Moving up the value chain towards leather goods manufacture, the unit of output is no longer a hide but may be as diverse as the different kinds of standard and non-standard leather products: belts, wallets, handbags, briefcases, luggage and so on. These items are produced in a wide range of environments, from urban workshops producing high-quality artisanal items to small, low-technology leather-goods makers producing serviceable items in rural settings, to mechanised production lines. Each of these production sites will exhibit different combinations of skills, machinery, resources and materials, and will operate according to multiple business models. These different production environments co-exist, operating concurrently in almost every developing country's leather sector. It is therefore important to recognise that, on the African continent, leather goods production can straddle a diversity of production environments, as well as skills configurations, and each country's leather goods sector will have a different mix of these types of production, generating an equally mixed demand for labour. It is therefore necessary to consider a leather labour market as geographically differentiated at the local level in its skills demand. This can be understood with reference to leather goods manufactured with or without access to electricity: the more mechanized skills practised in a workshop with electricity will be different from the more manual skills practised in the absence of powered machinery.

► Table 1: Diversity of skills demand across the leather value chain

Sub-sector	Stage in value chain	Activities	Aims	Skills and typical jobs	Diversity of skills demands
Agriculture	Animal husbandry	Treatment of animals to conserve quality of hide/skin	Limit skin and hide flaws on live animals	Managing animal behaviour	Low diversity  High diversity
	Abattoir	Removing (flaying) hide/skin intact and undamaged	Limit slaughter and post-slaughter defects on skins/hides	Hand fleshing; Fleshing machine operator	
Leather Processing	Tanning, post-tanning & finishing	Physical and chemical process applied to hide/skin producing leather	Converting skin/hide to leather. Enhance commercial properties and appearance	Production manager; Leather technician; Factory leather process workers	
Leather Manufacturing	Leather goods manufacture	Manufacturing leather goods	Produce: belt, wallet, handbag, briefcase, luggage	Artisanal to mechanised production - multiple business models	
	Leather footwear manufacture	Manufacturing footwear	Produce: school shoe, security force boot, ladies and men's fashion, sport shoe, sandal	Artisanal to mechanised production – multiple business models; Fit to form fabrication	

Source: Authors' elaboration.

In the following discussion, the diversity of production environments in footwear manufacture is considered further. This is because footwear manufacture, except perhaps in the production of some simple leather footwear lines such as flip-flops, involves the use of a three-dimensional form - or last - as the template for building a shoe. This is the key differentiator between leather goods production and leather shoe production, the latter being more complex. Separate analysis of the skills demanded for each of the processes of tanning, leather goods production and footwear production could not be accommodated in this report. However, anecdotal evidence indicates that the leather goods and footwear sub-sectors tend to attract a larger part of the leather workforce than does tanning, and are more important for migration. We therefore decided to focus on skills demand from the leather goods and, in particular, the footwear sub-sectors, which tend to absorb more labour and generate more added value than the tanning sector.

## ► Leather footwear manufacturing: diversity of skills demand

Since the mobility of migrant leather workers is of central concern to this research, understanding the nature of skills demand in the leather sector requires us to establish how the tasks and skills involved are allocated in the production process. This step is necessary to get a sense of how footwear workers acquire skills through performing certain tasks or are taught the skills required for such tasks. We then need to consider how these skills could contribute to occupational access and progression within an enterprise's shoe production line, and how the accumulation of leather-related skills and experience could be part of an external, independent skills recognition process or programme. These questions are given special attention in this report, where the focus is on migrant leather workers and their levels of mobility. The six activities commonly taken to represent the backbone of shoe manufacture are set out in Table 2. We have omitted activities "I" and "ii", since these are generic activities, undertaken without the need for dedicated leather shoe-manufacture equipment or skills.

► **Table 2: Outline of activity stages in shoe manufacture**

i	Delivering leather onto the cutter's table at the site of production
a.	Cutting
b.	Skiving
c.	Stitching
d.	Lasting
e.	Sole bonding
f.	Finishing
ii	Packaging and outward delivery into a distribution network

These six activities are fundamental to making shoes. In different production environments, these activities are carried out differently using different types of equipment and technologies, from hand tools to high technology robotics. In low-technology environments, traditional hand skills will be used, whereas in high-technology contexts, demand for skills will shift towards managing machinery and, more recently, robotic production. This is an important issue, given the wide range of circumstances in which enterprises allocate skills to different tasks, especially in footwear manufacture.

Table 3 below summarizes the three main footwear production arrangements, reflecting increasing use of technology:

### *Traditional manual tools - artisanal skills*

Traditional artisanal shoe-making skills are fundamental to the ability to make shoes with hand, mechanical and powered tools (1, 2 & 3). These skills are sufficient for an apprentice to be able to make a shoe, and improving these skills enables an artisan to make shoes of the quality required by the client. In these three environments, the six activities involved in manufacturing a shoe are conducted one after the other, in some cases by the same artisan, although the different activities might also be shared between two or more workers.

*Mechanized production - machine operator skills*

In mechanised factory production, demand shifts to incorporate medium-level operator skills involving the safe, uninterrupted and efficient production of shoe components (4 & 5). In these two environments, the focus of planned shoe manufacture is on the capabilities of the machines that replace human skills, depending on which machines are acquired to perform a particular task. Automation shifts the nature of occupational demand towards middle- and high-level technical skills.

*Advanced digital technologies - technician, technologist and engineering skills*

Cutting-edge shoe manufacturing technologies (Altenburg et al 2020; Cocuzza et al 2013) involve highly skilled personnel who can design and fabricate automated and robotic machines, as well as the technologists and technicians needed to manage them (6 & 7). A further innovation at this stage of technology application is the digitization of shoe design in the form of Computer Assisted Design, whereby almost all stages of shoe production are amenable to automation.

► **Table 3: Tools and machinery in footwear manufacture production and associated occupational categories**

Occupational categories		1	2	3	4	5	6	7
		Artisanal skills			Machine operator skills		Technician and engineer skills	
Tools and machinery		Hand tools	Mechanical tools	Powered electrical tools	Auto-mated machines	Conveyor belt production line	Automated Production and design configuration	Robotics integration of production and customisation
a	Cutting							
b	Skiving							
c	Stitching	Hand	Treadle sewing machine	Stitcher/ operator Electrical sewing machine	Stitcher/ operator Electrical sewing machine	Stitcher/ operator Electrical sewing machine	Limited to specified 2D-seams	
d	Lasting						Automated production stations	Robotic cells Robot-mounted sensor (eye-in-hand)
e	Sole bonding							
e	Finishing						Computer Assisted Design	CAD3D design
	Design							

Source: Developed by authors

It is important to recognise that access to electricity, basic leather tools, powered stitching machines, and automated and digital machines is unevenly distributed within African countries. Significant parts of the leather industry are still labour-intensive, whereas, depending on country context, other parts of the industry have become mechanized and automated. In some countries, such as in Ethiopia, the sector has introduced high-technology production systems. This observation also applies to tanning in countries where parts of the sub-sector have become very capital intensive and have consequently shed jobs.



An interesting occupational feature that will be further discussed in a later chapter is the status of leather stitchers, who operate sewing machines. Stitching is a skill that cannot easily be replicated by machines, except for certain straightforward tasks. Stitchers working in leather, and equally in the clothing industry, are more difficult to replace with machines (Tilman et al 2020; Oliver et al 2021). For this reason, stitching as an occupation is an obvious candidate for skills development, qualifications and RPL opportunities, since these skills not only seem to be durable in the context of automation, but also have application across the leather, garment and textile industries, as well as in furniture upholstery.

Table 4 below gives an overview of the occupational groups most strongly associated with each production environment. The bottom row indicates the skills or occupations required. The table makes clear how the balance of skills within footwear production has shifted towards medium and high skills as a result of developments in technology.

► **Table 4: Changing occupational demand depending on leather production technology implemented**

Tools and machines	Hand tools	Mechanical tools	Powered electrical tools	Auto-mated machines	Conveyor belt production line	Automated Production and design configuration	Robotics integration of production and customisation
Occupation	Artisan and apprentice			Machine operator		Technician and engineer	
Skills requirements	Hand skills	Manual skills	Machinery handling skills	Operators Technicians Mechanics	Operators Technicians Mechanics	Software Engineers Production Engineers Mechatronics Technicians	Robotics engineer Software Engineers Mechatronics Technicians

Source: Developed by authors

This analysis is presented to draw attention to the relative prevalence of different forms of leather goods production in different national leather industries. In high-income countries, the balance of leather footwear production is likely to fall between the centre and right-hand side of Table 4, with a limited number of artisanal and niche producers. In low-income countries, the balance of production activities will probably fall between the middle and left-hand side of the Table. This being the case, a national leather industry labour market could be described as differentiated according to the skill demands and technology levels of local leather manufacturers. Consequently, migrants entering a destination country with limited or artisanal leather-working skills might be able to set themselves up as own-account workers but would not be prepared for entry into a production line environment. In countries where the leather industry is differentiating, leather-working migrants possessing skills that do not match the requirements of local production would need to upskill, deskill or relocate. This highlights the importance of understanding migrant mobility as a mixed blessing or a double-edged sword, which might land migrant workers in circumstances they would not choose to be in.

The skills and occupational frameworks presented above should also factor in the balance between formal and informal economic activity in a country. This is because the manufacture of leather goods and shoes is a significant feature of the labour markets of many African countries, for instance as Kenya, where the informal sector is estimated to employ two thirds of all leather-sector workers as compared to the formal sector's one third. Low-skilled leather-working migrants find employment mainly in the informal sector. The Kariokor market in Nairobi has a vibrant, competitive informal section, with only restricted technology available. Informal leather-sector firms, in rural areas especially, struggle to access capital for investment. They also experience unreliable electricity supplies and limited technical support for the maintenance of machinery, which restricts their ability to increase production. In these conditions, migrant workers in Nairobi's markets have occupied a niche role in shoe repair and in the renovation of imported stocks of used footwear – known as Mitumba – for resale.

## ► Migrant workers' experience of labour markets and employment conditions

The following table focuses on the employment of leather-working migrants, with reference to those with formal skills ranging from technician level to high-level and management skills. This group is employed by formal-sector firms which grant fixed-term contracts, usually negotiated in advance, with visa and work-permit arrangements made by the employing firm. Migrants in this category might be recruited from an African, and Asian or a European country, depending on whether foreign investment is involved or whether the firm has purchased manufacturing equipment from a foreign supplier. In the latter case, skilled personnel would remain for a fixed period to train local personnel or to supervise operations. Migrants in this category are usually admitted to the country on the basis of concessions granted by governments to support sector growth. Migrants with high- or mid-level technical skills experience low barriers to entry. As one participant stated: "These are the migrants that arrive at the airport."

This kind of arrangement is found in countries with more technologically advanced leather industries, such as Ethiopia and South Africa, which have progressed towards higher technologies. Ethiopia has attracted substantial investment support, especially from China and India, while the South African leather industry benefits from strong government support, though this has declined since 2016. The Ethiopian government has entered into ring-fenced agreements to introduce highly developed and fully-fledged online production capabilities.

► **Table 5: Labour market experience and employment conditions of migrant workers**

Skills level	Role	Qualifications and skills	Migrant origin	Sector	Contract	Access route	Barriers to entry
High skills	Manager Supervisor Tanning chemist Production engineer	Formal occupational professional qualifications	Non-African or African	Formal	Fixed term	Employer negotiates visa and work permit pre-arrival	Low
Mid-to high level	Technician or Technologist that installs new machinery and trains local operators	Formal vocational qualifications	Non-African or African	Formal	Short term	Employer negotiates visa and work permit pre-arrival	Low
Mid to low level	Artisan Medium-skilled	Formal, non-formal; informal	African	Informal/formal	Can vary	Regular or irregular With/out work permit	High
Low/basic skills	Production tasks: operate manual machines	Formal, non-formal; informal	African	Informal/formal	Monthly, Weekly or daily	Regular or irregular With/out work permit	High

Source: Developed by authors

Table 5 shows low-skilled migrants as experiencing high barriers to entry, paid employment and access to other social conditions and rights (such as freedom from discrimination). These cohorts of workers, of whom the majority are African, enter the destination country by regular and irregular channels. They tend to be of artisanal, medium-skilled status, acquired through informal/non-formal training, work without a contract and are paid a daily, weekly or monthly wage. This research focuses mainly on this latter category of migrants and includes a chapter reflecting interviews with low-skilled and low-income migrants in South Africa and Kenya.

## ► Overview of the migration cycle

Determination to migrate and assert the right to mobility is driven by a combination of factors, in particular the migrant's resources and skills that she/he can offer, and the sustainability of the structure and income security of the household in the originating country. In addition, there are environmental push-and-pull factors. "Push" factors would include limited employment opportunities in the local labour market, unattractive local wage rates and inhospitable working conditions. On the "pull" side, The prospect of migrating would be perceived as attractive in opening up opportunities for more conducive working conditions, a comparatively higher income allowing for repatriation, and better prospects of job retention. The migration process is captured in the table below, which identifies key influences on migrant workers' mobility, beginning with the conditions experienced in the country of origin.

► Table 6: Overview of influences on migrant worker mobility

<b>Origin country</b>				<b>Destination country governance of immigration</b>		<b>Destination country governance of employment</b>		<b>Return</b>
		<b>Migration process</b>		<b>Institutional Barriers and facilitators</b>		<b>Employer's business and production model barriers and facilitators</b>		<b>Possible cycle</b>
Economic sector share	Labour market	Personal occupational status, skills experience, qualifications	Information costs, solo/group	Resources at arrival & migrant status –documented/ undocumented	Job search	Skills, occupational shortages & locations	Economic sector share	Return to same or different country and/or employer
	Formal – Informal				Referral Introduction Cold call Daily casual labour Formal application			
<b>Socio-political &amp; economic conditions</b>		<b>Migrant's household obligations</b>		<b>Job search strategy</b>		<b>Economic &amp; employment conditions</b>		

Source: Developed by authors

The interaction of migrant workers with the society and labour market of a destination country could be assumed to follow a particular path, from entering the country to taking up employment to returning to the country of origin. In the above table, destination country governance of immigration and employment is separated out for clarity of analysis. A migrant's "lifecycle" would require government services from different administrative functions and services in the destination country to facilitate the migrant's sojourn and work contract, in accordance with existing laws and regulations.

## ► Structure of this report

This report is structured as follows:

Chapter 2 presents a framework giving an expanded and inclusive view of what factors in the migrant environment that might act as barriers to mobility. This inclusive perspective takes into account the influence of social factors such as discrimination; safety and adequate policing; access to social safety nets and health care; and access to labour market information. These are considered in addition to critical visa and work permit requirements and the availability of decent.

Chapter 3 compares the legislation of six countries (Ghana, Côte d'Ivoire, Ethiopia, Rwanda, South Africa and Kenya), which were selected taking into account the available data on the export performance of their leather sectors and the percentage of migrant workers per total population in the country. The focus is on the legislative provisions for the treatment of migrant workers, primarily with respect to their entry into the country and their access to employment. The chapter concludes with discussion of a possible means of rating or ranking national environments in terms of their openness to and support for labour-migrant mobility, based on several criteria.

Chapter 4 presents an overview of the presence and involvement of migrant leather workers in each of the six countries concerned. Four of the six countries are described in detail, while South Africa (Chapter 5) and Kenya (Chapter 6) are described more fully in the subsequent chapters dedicated to them.

Finally, Chapter 7 presents the findings of the report, mainly concerning the general characteristics of leather sector labour markets and the production systems that largely determine these characteristics, which in turn impact on the mobility of migrant leather workers.





# 2

## Chapter 2 Governance and institutional influences on the mobility of migrant workers

### ► Introduction

There are many factors that influence the mobility of migrant workers in a destination country. It is important to place this research project in a mobility framework which takes into account the fact that migrants experience legislative and regulatory influences, and have to contend with aspects of soft power, including attitudes and values about who does what work and who may be accorded the privilege of working and residing in a country. We therefore need to consider the governance-related and institutional influences on the mobility of migrant workers. Making sense of how these factors impact on migrant mobility is necessary because these influences will impact on migrants' decision-making and actions in different ways.

This chapter examines the legislation governing access to a country and the labour legislation that directly influences the quality of migrants' physical mobility and access to decent work. Based on this legislation, government departments and agencies have established administrative structures and developed procedures to manage the presence and actions of migrants entering the country with the intention of finding employment. Our analysis is concerned with whether a country's legal enactments make provision for migrant workers to work openly and freely, and whether the country's administrative systems implement the legal provisions and regulations in practice, so that migrants receive the benefits of access to work and wages. Since the comparison of one country with another is based primarily on legislative enactments, there is opportunity to consider countries' difficulties in how they enact their policies and how this may inadvertently result in outcomes that the legislation itself does not necessarily anticipate.

Our comparison of the laws and regulation of the six countries concerned focuses on their provision for the treatment of migrant workers, primarily with respect to their entry into the country and their access to employment. The chapter then takes a more inclusive view of the factors in a destination country that are likely to impact on a migrant worker's mobility. We then draw attention to the salience of RPL opportunities, which, if implemented, could enhance occupational mobility of migrant workers. RPL confers a benefit on workers and places a market value on their skills because it leverages their experience, learning and skills by identifying, validating and packaging that learning as a qualification or part thereof.

## ► National legislation relating to labour market access and employment conditions

Legislation is a necessary building block structuring individual conduct in a country committed to the rule of law and having a constitution. However, as has been pointed out before, and as can be observed in all systems of governance, there is usually a gap between the *de jure* stipulations and *de facto* reality. We therefore decided to investigate legislation and regulations that specifically address: (a) immigration requirements, (b) work permits, (c) employment conditions, (d) wage determination, and (e) the existence of a National Qualifications Framework (NQF), as well as evidence of RPL regulations and of RPL practices. The outcome of this initial overview of legislation and regulation is presented below in tabular format for each country. All the tables were compiled with due caution, and a concerted effort was made to find the most recent updates to the legal texts concerned. Given the constraints involved in sourcing expertise in the languages in which the legislation was originally published, and reliance on translation into English or French, some country tables may need amending. Nevertheless, the tables provide a point of departure for making observations on aspects of the legislation.

*Appendix A* contains six tables, one for each participating country, describing the legislation that governs migrant entry, access to visa documentation, admittance to the labour market, and opportunities for taking advantage of RPL and skills recognition.

Firstly, the tables reveal that legislation is in place in all the countries concerned governing immigration (entry/access to sovereign territory), work permits (access to legal employment), basic employment conditions and wage determination. There appear to be some differences between countries in terms of which categories of migrant workers may experience difficulties in obtaining documentation, such as work permits. These conditions may change over time, so the table will need to be adjusted to reflect future circumstances.

Secondly, the tables reveal limitations in legislation and regulations relating to national qualification frameworks (NQF). This legislation is relevant because it lays the foundation for the evolution of qualification systems that support innovation in domestic education and extend access to learning and skills opportunities horizontally and vertically (i.e. nationally and regionally). This is an important legislative step as it enables migrant workers to have their skills recognised and to enhance their skills by taking up educational opportunities in the destination country. Since RPL legislation exists, there need to be regulations and structures that enable RPL activities to take place, as well as the funding, expertise and resources required for the actual practice of RPL. Since RPL holds out the promise of facilitating migrant learning and skills development, we decided to explore how much progress had been made in actual implementation.

Thirdly, the tables indicate only limited evidence of implementation of RPL projects or programmes that would ensure migrant worker mobility and access to labour markets at a local level.

Fourthly, the tables focus particularly on national legislation and regulation. The importance of free movement of migrant workers within economic communities in Africa is acknowledged as a critical factor in promoting their mobility. The extent to which the ECOWAS Free Movement Protocol and the East African Community (EAC) Common Market Protocol (CMP) facilitate labour mobility in their Partner States is also relevant. For instance, the CMP Schedule for the Free Movement of Workers (Annex II) refers to types of skilled worker that may have access to Partner States, but seems to exclude the low-skilled.

The following discussion makes certain observations regarding the relevant legislation as background to the main research topic, but is not intended to provide a comprehensive overview.



## Movement of migrant workers

Since Kenya is part of the EAC, its citizens benefit from access to EAC member states' labour markets through visa-free entry (ILO 2020b). Rwanda is also a member of this economic block and enjoys the same benefits as Kenya.

Some trade unions and RECs in the case-study countries articulate the importance of free movement of workers. For example, the Central Organization of Trade Unions of Kenya (COTU-K) is an umbrella organization of 44 trade unions representing workers in the formal and informal sectors. The COTU-K is a member of the East African Trade Union Confederation (EATUC), a regional workers' body that promotes the interests of workers in the EAC and advocates for the free movement of persons. According to the EATUC, most migrant workers are in the informal sector and do not belong to trade unions (ILO 2020b). Similarly, employer organizations collaborate with partners to facilitate worker mobility. For example, member companies of the Federation of Kenya Employers (FKE) liaise with companies in other countries to obtain work permits for their migrant workers (ILO 2020b). In the case of Ghana, being a member of ECOWAS has enabled the Government to sign treaties with other member states that allow for free movement of people within the region (Republic of Ghana 2016). In 2019, the country had registered 466,800 international migrants, accounting for about 1.5 per cent of the country's population (Le Coz & Hooper 2021). In Ethiopia, migrant workers remain in a precarious position. Ethiopia has a number of laws relating to workers, but that do not specifically address migrants. However, certain national institutions, such as the Ministry of Foreign Affairs and the Ministry of Labour and Social Affairs, have powers and responsibilities to protect migrant workers (Ashine 2017). Rwanda is also a party to UN Conventions on the protection of migrants but has not fully adopted them through ratification (Republic of Rwanda 2016).

## Work permits

There are differences between countries in how migrants can obtain work permits. Limitations in access to visas and work permits compromise migrant worker access to formal employment opportunities. Where migrant workers are expected to rely on the same services and channels as nationals, who may receive priority attention, migrants may struggle to access the necessary documentation. And where migrant workers seek redress, again they may have to use the same channels as local workers, for instance the labour courts (ILO 2020b). In most of the case-study countries, workers who have permits and are in the formal sector enjoy all the protections that local workers enjoy, such the right to annual leave and pension benefits. However, there is limited information relating to the treatment of workers in the informal sector.

## Qualifications frameworks

Kenya has an NQF and subscribes to the regional East African Qualifications Framework for Higher Education (EAQFHE). When it comes to recognition of foreign qualifications, the Kenyan National Qualification Authority (KNQA), working with foreign accreditation bodies both on the continent and globally, is responsible for the process (Overeem, 2020). There is no explicit and clear policy on RPL as it relates to migrants, though it should be pointed out that the legislation is new and subject to modification (Brankamp & Daley 2020). Ethiopia has been developing a NQF for several years; the provisions for recognition of foreign qualifications need to be clarified (Keevy 2020). Ethiopia also participates, although to a limited extent, in the EAC. Rwanda belongs to the EAC and subscribes to the EAQFHE alongside Kenya. Ghana, on the other hand, is a member of the ECOWAS REC and subscribes to the RQF for the region. The negotiation of qualification frameworks may become easier with the evolution of the ACQF.

## Recognition of prior learning

With the move towards a fully implemented NQF, it is envisaged by the Commission for University Education in Kenya that “the KNQA should provide migrant workers with certificates equating their qualifications, which would facilitate their ability to work in Kenya” (ILO 2020a, 43). Ghana has a qualifications sub-framework that covers technical and vocational education and training (TVET) (Tuck 2007) and emphasizes the importance of RPL for including people who have gained skills in the informal sector. Countries that have an NQF are more likely to make explicit reference to RPL, but there is a lack of evidence as to whether measures are being implemented. In conclusion, there is a lack of information on the implementation of RPL for national citizens, and even less on whether migrant workers have access to such services.

## Factors impacting access to decent work and living conditions for low-skilled migrant workers

Migrant leather-sector workers’ efforts to secure employment are impacted by an array of factors, in addition to the legislative provisions of destination countries and the need for skills recognition.

Firstly, contact with or failure to contact the government departments and agencies of a destination country critically shapes an incoming migrant’s future employment experiences. If a migrant bypasses a government border crossing office or crosses where there are no officials, a chain of consequences is set off that will negatively impact on her/his employment opportunities. In the case of irregular migration, an undocumented migrant searching for employment often ends up working in the informal economy. By bypassing this step in the destination country’s legislative framework, migrant workers will probably limit their labour market mobility for the duration of their stay. However, it is important to recognise that “bypassing this step” is often not a choice, but a simple reality.

► **Table 7: Factors impacting migrant workers' access to decent working and living conditions**

Legal access to a country leading to documented migrant status	
1	Passport and visa
2	Work permit
Active labour market structures can broaden a migrant's access to information and advice	
3	Private information about employment opportunities
4	Public employment services, including vacancy information
Employer treatment of migrant workers in selection, contracting and employment	
5	Fair work contract
6	Minimum wage offered
7	Working conditions guaranteed
8	Work safety ensured
9	Decent working conditions
10	Equitable treatment by gender, ethnicity
11	Receptiveness to qualifications and/or RPL of job applicants
Equitable access and inclusion of migrant workers in society	
12	Social attitudes to migrants
13	Employed/unemployed citizen attitudes to migrants employed locally
Extension of safety and policing services to migrant workers and families	
14	Protection: protection of migrant workers' rights
15	Access to Justice: Availability of channels for legal redress in the event of complaints from migrants
Access to social services for migrant workers	
16	Public health services
17	Social security
18	Public education access
19	Access to housing
RPL implemented with open access for migrant workers	
20	RPL implemented (level, occupation)

Secondly, there are incentives to continue to work in a destination country, such as access to health and social security benefits or access to education for children. However, these benefits may not be equally accessible for undocumented migrant workers. A further incentive for migrant workers would be their capacity to support their families in the country of origin. Unfortunately, low-skilled, low-wage migrants active in the informal sector report difficulties in remitting funds without bank accounts and the fact that their wages are eaten up by living expenses.

Thirdly, the legislation of the destination country may prescribe desirable conditions in the workplace, such as fair negotiation of wages with a minimum wage floor, or habitable working conditions. However, in the informal sector, where most low-skilled migrant workers find work opportunities, such benefits are determined by the goodwill of individual employers. Governments

may be working towards improving compliance, but this applies mainly to the formal sector. Uncertainty over working conditions and the likelihood of low wages are inherent risks.

Fourthly, migrants are a vulnerable social group and may be exposed to discrimination. The financial and social resource base of migrants is restricted, which makes them more vulnerable to risk. The fear of psychological, emotional and physical threats from others affects their quality of life. They cannot necessarily count on the responsiveness of local law enforcement and implementation of the relevant policies and measures. Migrants may even suffer abuse in the form of police harassment or corruption. Information regarding these conditions is shared informally through migrant networks and does seem to inform decision-making to some degree. This information would be considered as part of the overall process of deciding what country, city or neighbourhood that would choose as their destination.

Within this framework, RPL could be conceived as conferring a benefit on a worker because it leverages the worker's experience, learning and skills by identifying, validating, and formally packaging that learning as a qualification. An RPL certificate then commodifies or confers market value on a migrant's skills, knowledge and experience.

A migrant worker in the informal sector who has completed an RPL programme might then seek employment in the formal sector. However, in the case of a migrant whose status is irregular due to lacking documentation, the possession of a qualification would not overcome this barrier. Moreover, informal sector employers may be relatively indifferent to the value of qualifications in taking decisions about employing low-skilled workers.

## ► Opportunities for RPL interventions in the context of low-skilled migration on the continent

The most cited RPL programmes in developing countries have been implemented between a developing country and a more developed partner country. Most are concerned with occupations employing large numbers of migrants, for instance domestic workers moving from Ethiopia to the Gulf States or between Bangladesh and various destination countries (Awel, n.d.; Barkat & Ahmed, 2014: 20,45,49,52-53,66; Nakata, et al., 2021; Parreñas, 2021). It has taken time for bilateral relations between the respective country partners to strengthen and for their mutual migration systems to evolve. The main objectives of government involvement in developing migration systems are to secure the safety and wellbeing of the migrants themselves, to introduce RPL programmes as a way of improving the status of migrants in the destination country's labour market, and to add value to and improve their skills and quality of service in the occupations in question.

Migration partners and employers have implemented RPL for migrants at three different stages of the migration process: (a) RPL in combination with training before migrants leave to become employed, though RPL is not often a concern in countries of origin; (b) RPL for experienced migrants while they are currently serving in the destination country; and (c) RPL for migrants on their return from work at the end of a contract. The practicability of implementing such RPL opportunities is being tested in various places, but their feasibility depends on there being an existing RPL system that migrant workers can access. Recent innovations include use of online modalities to bring together RPL candidates and assessors during the RPL process, thus extending greater RPL opportunities to migrants while they are working on site in their destination country.

The success of these programmes depends on countries of origin selecting occupational "niches" for introducing RPL taking into account the kinds of occupations that are open to migrants in the destination country. Selected occupations that involve large numbers of migrants generate economies of scale and so make RPL more viable, for instance in the case of workers in the Asia region originating from Bangladesh and the Philippines (Etzold & Mallick 2016, ILO 2021).

## The Role RPL in the context of African labour migration

A migrant cannot make a reasoned assessment as to whether RPL would be in her/his interests without understanding what RPL is about and the benefits it offers. Since RPL programmes in most African contexts target national populations, the participants interviewed displayed no general awareness of RPL. The point is that until RPL is practised more widely with a footprint at country or sector level, it is essential to involve large numbers of beneficiaries so that programme becomes familiar. This gap could be closed when migrants have experienced the benefits of RPL and begin to share their positive experience through their various networks.

### Low-skilled workers and RPL

A relevant question, therefore, would be when to offer an RPL programme to a cohort of migrant workers in the leather sector. From the participants interviewed in South Africa, it is apparent that most migrant workers who ended up working in leather had no initial intention or desire to take up work in the sector. Furthermore, a majority had not had any prior work experience of leather-working but were prepared to take up any job to earn an income.

Offering RPL to a migrant worker who has limited occupational experience of the leather sector may not prove to be the optimal use of resources. This further implies that attempting RPL in the first or early phase of a low-skilled migrant worker's lifecycle may be inadvisable. Interviews with low-skilled informal migrant leather workers revealed that they prefer to keep their jobs over several years. This suggests that the security of having a steady job is very important and that undertaking RPL to re-enter the labour market, with the attendant risks, may not appeal to them.

### Coordination of migration, employment, RPL and other domains

Regularizing and institutionalizing migration is highly relevant to the outcome of RPL initiatives. It is important to consider how labour migration is governed and to what extent policies relating to migration, employment and other policy domains, including RPL, are coordinated. An inclusive approach must consider how, by virtue of their circumstances, documented and undocumented migrant workers face different challenges and needs where RPL is concerned. In a study of leather-sector education and training in post-school institutions in Africa, the ALLPI observes that there is limited awareness of the overarching concept of NQFs among leather-sector stakeholders in both the public and private sectors (ALLPI 2021). This suggests that the awareness and buy-in of policy participants needs to be taken into account.

The policy domains involved in supporting migrant worker mobility are complex. As a core element supporting the mobility of migrant workers, RPL is not a simple process, presenting as it does challenges for implementation and for harmonization between countries. Taking into account the complexity of a migrant worker's access to a destination country and to its labour market, there is a need for sound policy-driven collaboration between the various government ministries responsible for the governance of migration, RPL, decent work, workforce skills development and social cohesion.

## Cost and benefits of institutionalizing RPL

RPL programmes are designed and developed through collaboration between employers, RPL practitioners, union/worker representatives, the local/national skills authority and migrant worker beneficiaries. Developing RPL capacity can be resource-intensive work. The benefits of RPL are that it increases worker employability and mobility, bridges the informal and formal economies and opens access to formal training. However, even though migrants would benefit from the social inclusion associated with RPL, they may not be able to afford the costs if charged on a cost-sharing basis (Aggarwal 2015, 23). The investment required to develop and implement RPL systems will inevitably deplete available resources and jeopardise sustainability. It is therefore important to clearly define the scope of RPL programmes and conduct a cost-benefit analysis that takes into account destination country resources and capabilities, and migrant needs.



# 3

## Chapter 3 Methodology

### ► Introduction

This project was conducted in three main phases. Firstly, we undertook an online preview of six countries. This involved researchers based in Johannesburg (South Africa) in contacting and interviewing leather-sector participants in the public and private sectors of each of the six selected countries by telephone. One or two interviews were conducted for each country, and notes taken to capture the interaction. Due to difficulties in identifying participants and obtaining agreement to conduct interviews online with only a small number of participants, this approach yielded only limited results. The per-country interviews were thus of limited value in identifying and contacting stakeholders and were not sufficiently data-grounded to inform a choice of countries for case studies. The exercise was, nevertheless, useful as it showed that having researchers working online to identify and select participants and conduct interviews is an inefficient, hit-or-miss approach. It was realised that an in-country researcher presence was essential to target participants and carry out interviews.

This was followed by in-country profiling of the six countries. The aim was to generate a profile of the leather sector of each country in terms of its current growth and employment capacity and, at the same time, to identify the numbers of migrant workers employed there. This task was to be performed by an in-country researcher, with eight days allocated to conducting interviews and gathering other data. A structured report on each country was produced. The reports provided the basis for comparing the six countries and choosing two to be investigated in greater depth in the form of case studies. The third phase involved in-country case studies in two countries, the two which provided the best opportunity for studying the incorporation of migrant workers into the domestic leather industry: South Africa and Kenya. These two studies examined the extent of migrant mobility in each country taking into account enabling and restraining factors, including labour market conditions and the propensity to employ migrant leather workers. Each of the above phases is described in more detail below.

► **Table 8: Phases of the research**

Phase	Phase 1: Preview	Phase 2: Profiling	Phase 3: Case studies and migrant interviews
Countries involved	6	6	2
Main focus per phase	Online pilot interviews	Migrant presence and sector shape	Migrant worker experience of job seeking and employment
Fieldwork mode	Online	In-country presence	In-country presence

## Phase 1: Preview

This first phase involved online identification of participants via a search engine (mainly Google), followed by interviews with participants via online conferencing/meeting applications. Two main problems emerged. Firstly, it was very difficult to find appropriate participants and viable telephone numbers on which to contact them and make appointments. The participants interviewed across the six countries included a leather manufacturer, a leather exporter, a leather industry development agency, a government economic development department, a training service provider to the leather industry, a tannery association representative and a leather manufacturing enterprise owner. Secondly, the interviews revealed that the participants who did make themselves available could only speak about their part of the leather industry value chain, and their accounts were based on their areas of expertise and occupational roles. None of the participants could point us to available empirical materials related to the industry or parts of the industry in the form of studies or databases, whether research-related or administrative. The observations made by the participants from the respective countries could not be triangulated. Consequently, the exercise did not garner sufficient valid and verifiable observations to assist us in deciding which countries should be selected for case studies. Having completed Phase 1, the preview phase, which did not lead to a choice of countries, a decision was taken to restructure the fieldwork in accordance with the phases shown in Table 8.

## Phase 2: Profiling

The aim of Phase 2 was (a) to develop a profile of migrant leather workers in their country context and (b) to generate sufficient information on the presence of migrant leather workers in each country to enable two countries to be selected for Phase 3, the case study phase. Phase 3 was to focus on migrant leather workers' experiences in their destination countries. To avoid the weaknesses of the preview phase and counteract the limited success in identifying participants and securing their participation, it was decided to recruit in-country researchers to profile each of the six countries. It was also decided to give the in-country researchers more time for their fieldwork: eight days. This would enable them to secure a larger number of interviews and gather more detailed data, on the basis of which the two countries could be selected for the in-depth case studies.

The role of the in-country researchers/consultants was very important during this phase of the project. Their presence was a considerable advantage, and their in-country positioning added substantial value to the fieldwork and data gathering. It was important that the in-country researchers were citizens of their own countries and had personal experience and contextual knowledge. This familiarity enabled them to understand the environment and interpret the evidence more faithfully than would a non-national researcher. The researchers were also mindful of the fact that being an insider could, in its own way, be a source of bias. They were therefore full members of the team, and their contribution to the fieldwork and analysis was essential in making this phase of the project a success. Sought-after informants are strongly networked by virtue of their connectedness in a community of interest (e.g. owners of leather businesses) or tend to have longstanding and varied experience in the leather industry, or particular skills in the leather value chain. A summary of the interviews undertaken for the purposes of country profiling is given below.



► Table 9: Summary of interviews held with participants in the six participating countries

Country	ILO field office	UNIDO field office	State organs	Training providers	NPO/ NGOs that support entrepreneurship	Leather producers' co-operative	Leather manufacturers' association/ manufacturers	Tanneries association	Employer associations	TOTALS
Ghana	1	0	2	3	0	0	2	0	1	9
Côte d'Ivoire	1	0	1	1	3	0	4	0	0	10
Ethiopia	1	1	3	3	1	2	1	1	0	13
Rwanda	0	0	2	0	1	1	5	0	1	10
South Africa	1	0	2	2	0	0	4	1	0	10
Kenya	0	0	2	0	0	0	4	2	1	9
TOTALS	4	1	12	9	5	3	20	4	3	61

This work provided the background and a basis of knowledge for selecting two countries for case studies: South Africa and Kenya.

### Phase 3: Case studies and interviews with migrants

The decision to select South Africa and Kenya for case studies meant that the initial country profiles had to be followed up with further research into the structure of each country's leather sector to discover the circumstances in which migrant workers were employed. These case studies provided a platform for further fieldwork to explore migrant experiences and how they had managed to find employment or insert themselves into the leather sector as own-account workers or, in a small number of cases, as small and micro-business owners.

Conducting the interviews was a challenging task. Firstly, the migrant workers had to be "discovered" by walking about in precincts known to have a migrant worker presence. Some migrants were identified by referral. However, migrant participants were reticent about referring the fieldworkers to other migrants; this might be interpreted by the person to whom the researcher was referred as having been done in bad faith. Secondly, migrants were suspicious of being approached by fieldwork researchers and were reluctant to disclose information. Some regarded their legal status, whether documented or undocumented, as off limits. This reticence was respected by the fieldworkers, who were in any case able to deduce a participant's legal status from his or her other responses. In all cases, in the preamble to each interview, the researcher gave assurance of anonymity and confidentiality and confirmed with the participant the right to terminate the interview at any stage. Two migrants in the South African group discontinued their interviews because they felt discomfort. On the other hand, there were participants who responded with equanimity or bravado. It is relevant to note that in both countries, the police had been ordered to carry out spot checks on people suspected of being migrants.

► **Table 10: Migrant leather worker interviews in Kenya and South Africa**

Localities	City	Country	Interviews
Greater Cape Town	Cape Town	South Africa	5
Pietermaritzburg leather cluster	KwaZulu-Natal	South Africa	8
Thembisa Township	Gauteng	South Africa	6
Various markets in the city	Nairobi	Kenya	11
			30

## Selection of countries for inclusion in this study

Ghana, Côte d'Ivoire, Rwanda, Ethiopia, South Africa and Kenya were selected on the basis of data on (1) the export performance of their leather sectors and (2) the percentage of migrants per total population of the country. As part of the selection process, and before any fieldwork was undertaken, it was necessary to establish a ranking of leather-industry activity in terms of export performance. It was also necessary to identify countries with more developed leather sectors, so that migrant leather-worker presence could be surveyed across the sector's whole value chain. Data on migrant numbers and migrants as a percentage of a country's total population was also introduced as a criterion for selection, as it was decided that the fieldwork should be done in countries where migrants comprise a higher percentage of the population, assuming that a higher total concentration of migrants in a country would include a proportionately higher population of migrant leather workers. The following table captures the estimated migrant population and the percentage of migrants in the population.

► **Table 11: Leather industry size, migrant population and resident population per country**

Country	Leather industry ranking	Migrant population (million)	Migrants as % of population
Nigeria	2	0.60	1
South Africa	3	4.10	7
Egypt	4	0.25	<1
Kenya	5	0.50	2.5
Ethiopia	6	0.65	1
Côte d'Ivoire	6	2.50	10
Mauritius	7	nd	nd
Namibia	8	nd	nd
Ghana	11	0.25	2
Madagascar	12	nd	nd
Rwanda	12	0.25	4
Mali	15	0.25	2
Malawi	19	nd	nd

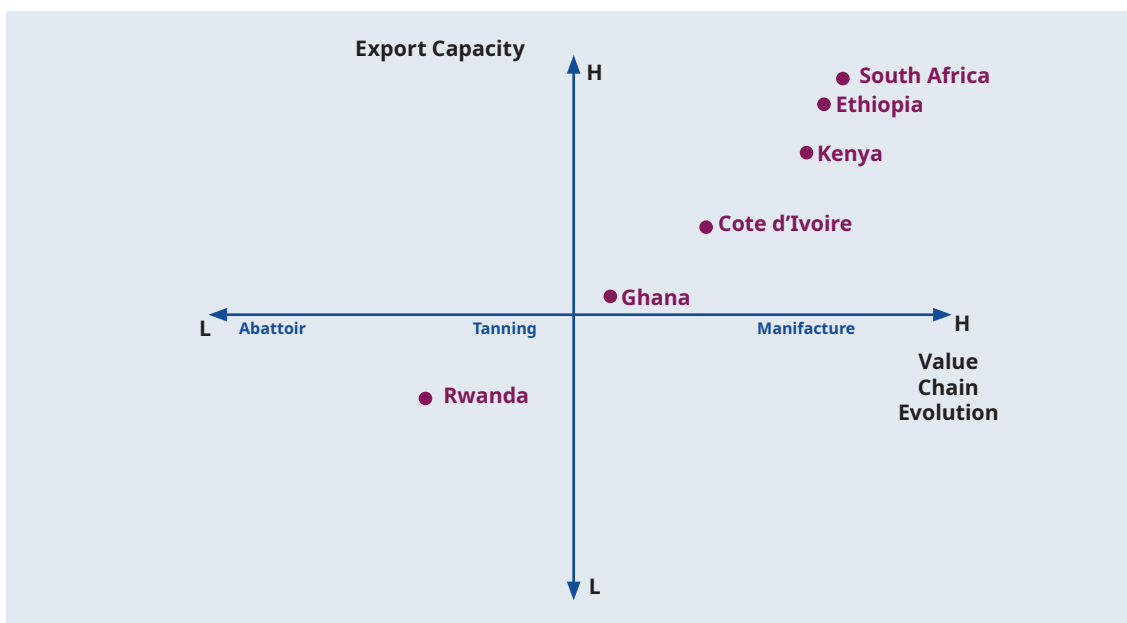
Source: IOM (2019)

The intention was to select countries from the above table with a high leather-industry ranking (as a proxy for relatively higher employment) and migrant groups representing a large percentage of the total resident population. The selection included the following countries, presented alphabetically, with total population numbers (World Bank 2020):

- ▶ Ethiopia, (112.1 million, 2019)
- ▶ Ghana (30,4 million, 2019)
- ▶ South Africa (58.6 million, 2019)
- ▶ Kenya (52.6 million, 2019)
- ▶ Côte d'Ivoire (25.7 million, 2019)
- ▶ Rwanda (12.6 million, 2019)

The above method, based on the export performance of the leather sector and the size of the migrant population in each country, was limited by a lack of data concerning the actual volume of employment in the leather sector, the actual numbers of migrant leather workers and their likely locations. Certain assumptions had to be made because standardized, sector-specific data on employment in the leather sector across African economies was not available. Furthermore, the export performance of a leather sector is not necessarily related to the volume of employment. High leather export performance may, for instance, be achieved through increased mechanization and reduced employment. Indeed, why, when and how migrant workers are incorporated into the leather industry workforce - and with what effect and what support, if any - are questions that this study will investigate. The available data confirmed that the leather value chains in Ethiopia, South Africa and Kenya are relatively well-developed, while those of Ghana, Cote d'Ivoire and Rwanda are relatively less developed. This observation is confirmed in the figure below. The implication was that the numbers engaged in the leather industry would be higher in Ethiopia, South Africa and Kenya.

▶ **Figure 1: Country value chain evolution and leather sector export capacity**



Source: Authors' elaboration.

## Selection of two countries for participation in the case study phase and for interviews with migrant leather workers

In Phase 3, the focus was on interviewing international migrant workers. It was therefore important to consider the density and the relative presence and accessibility of migrant leather workers in each country, which was likely to determine the difficulty or ease with which the fieldworkers would find migrant worker participants. Table 12 below shows that Ethiopia had the lowest proportion of international migrants in relation to the total population. In relative terms, the proportions of migrants in Kenya and South Africa were respectively twice and four times larger than in Ethiopia.

► **Table 12: International migrant stock, including refugees, asylum seekers and migrants for Ethiopia, Kenya and South Africa**

	Ethiopia	Kenya	South Africa
Country total population	114 964 000	53 771 000	59 309 000
International migrant stock including migrants, refugees and asylum seekers	1 085 517	1 050 147	2 860 495
International migrant stock including migrants, refugees and asylum seekers as a percentage of the total population	0.9%	2.0%	4.8%

Source: UNDESA (2020, Table 1 and 6)

Table 13 below shows that Ethiopia was the destination country with the highest proportion of refugees and asylum seekers (67.7%) among the total international migrant stock, in comparison with South Africa (46.6%) and Kenya (9.7%). Ethiopia also had the lowest proportion (32.3%) and lowest absolute number of international migrants (excluding refugees and asylum seekers) of the three countries. Furthermore, the international migrant stock (excluding refugees and asylum seekers) as a percentage of the total population was much lower in Ethiopia than in Kenya and South Africa.

► **Table 13: International migrant stock, with refugees and asylum seekers separated out, for Ethiopia, Kenya and South Africa**

	Ethiopia	Kenya	South Africa
Refugee and asylum seekers as a percentage of the international migrant stock	67.7	46.6	9.7
Migrants (excluding refugees and asylum seekers) as a percentage of the international migrant stock	32.3	53.4	90.3
Total migrant stock per country (excluding refugees and asylum seekers)	350 621	560 778	2 583 026
Migrant stock (excluding refugees and asylum seekers) as a percentage of the country's total population	0.30	1.04	4.36

UNDESA (2020, Table 1 and 6)

Fieldwork experience in Ethiopia suggests that interviewees were not clear on the differences in status between migrants, refugees and asylum seekers. In some instances, when participants

referred to “migrants” attending post-school or TVET institutions in Ethiopia, it is likely they were in fact referring to refugees, who are entitled to be admitted. Some participants indicated that, in their experience, they had not come across migrants. It seems that migration governance in Ethiopia is focused more on refugees and highly skilled non-African migrants, for instance from China, than on continental migrants. Awareness of migrants (other than refugees and asylum seekers) seeking work was more evident in the observations and statements of participants in Kenya and, even more so, among participants in South Africa. South Africa and Kenya were selected for participation in Phase 3.

## ► Data and information-related challenges for research strategy and methodology

Research methods must take into account the data and information available to support efforts to address research question(s). No information environment is perfect where the availability and quality of data is concerned, and the difficulties involved in accessing data relating to migration and labour markets are well documented. This fact has been acknowledged in discussions between the ILO, the AU and the IOM team and JET, and ways of dealing with the limitations in the data have been jointly addressed in meetings and communications, including a Technical Note from the ILO (2021). The research team was concerned that sector- or occupation-level data linked to migrants might not be available, and that a due diligence exercise should be undertaken when preparing the Inception Report. The results of this investigation reveal that there was insufficient data and REC sources to make it possible to differentiate leather-sector migrants from other migrants. The implication was that information on the occupational status of migrants would have to be collected during the survey component of the research.

We had to consider the limited availability and quality of data relating to migrant workers seeking work in the African leather sector who have qualifications, specifically those who have skills or experience of work with leather. There is acknowledged to be a “deficit in official and reliable migration data” (ILO 2017). The African Union Commission (AUC) and the ILO are jointly working on the shortfall, producing a *Report on Labour Migration Statistics in Africa in 2015* (AUC 2017). One area of concern is the “scarcity of disaggregated data on characteristics and conditions of labour migrants”, such as “stock and flow data, and possession of qualifications” (AUC 2017, iii). The gaps are reportedly large, in particular “inability to obtain valid and reliable data describing labour migration and its outcomes, such as stock and net flow data, longitudinal surveys, assessments of impact on destination and origin countries, and intra-regional remittances and their usage” (AUC 2017, iii). Furthermore, the aim of the AUC and the ILO is to “obtain gender and age-disaggregated data on labour migration and migrant workers, including economic activity, employment, working conditions, skills and educational characteristics, social protection, social security coverage, as well as on country of origin, migration status, family status, and earnings” (AUC 2017, iii). An inclusive exercise of this kind requires substantial amounts of data.

Similar challenges in data availability were encountered in work recently completed by JET research teams and published in an ILO report entitled “The potential of skills development and recognition for regulated labour mobility in the IGAD Region” (Keevy et al 2020). The research project “Free movement of persons and transhumance in the IGAD Region: Improving opportunities for regular labour mobility” focused on how to improve opportunities for decent work within the Intergovernmental Authority on Development (IGAD) region through regulated labour mobility (ILO, 2018). Gaps in data availability and accessibility were considered using qualitative methodologies and by making enquiries at government departmental level as to the availability of project-based data. Additionally, some databases created by non-governmental agencies, though not representative,

offered limited insights. However, the IGAD study addressed general mobility and did not focus on a particular economic sector or sectors, which introduces a higher level of research difficulty.

The information on country-level migration stocks tends not to include variables related to the occupational identity of migrants. In the preparation of this report, a limited review conducted on literature relating to corridor migration revealed that the migration corridor as a construct is applied as a broad concept and had very limited value for this study, since the proportion of migrants with an interest in finding jobs in the leather sector is a “fine-grained” statistic, and administrative data on migrants is rarely recorded at this level. No. does the occupational level seem to be examined in migration research in such detail as that would be useful for this study. Qualitative methods were employed in this study to shed some light on the migration directions of migrants looking for employment in particular occupations.

## Investigation of the current literature for data on migration

Labour market research and analysis, such as the envisaged study, requires various kinds of data and information. As previously mentioned, no information environment is perfect as regards quality and availability of data, and the research methods adopted must consider the data and information available to support efforts to address the given research question(s). In this regard, we observe that the availability and quality of data on migrant workers seeking a livelihood in the African leather sector, and who have qualifications, skills or experience of leather working, is very limited. Considering the current stage in the development of data systems on migration on the African continent, this observation naturally raised doubts as to whether the available data would be able to support the recent suggestion articulated at the joint ILO and JET meeting that this project might adopt a migration corridor approach. Such an approach, it was suggested, would involve “covering both origin and destination countries, which also implies assessing the return migration and the skills recognition for the returnees”. It was further suggested that the project might generate “specific recommendations (that) will be provided for the selected migration corridors, which then could be generalized, to the extent possible, for the AUC” (ILO 2021). From the analysis of data availability below, this valuable outcome may not yet be possible.

Assessment of the likelihood of finding the data required for the envisaged study, i.e. to make possible the identification of migration routes used by people with particular skill sets related to the leather industry, mainly in terms of tanning and manufacturing, led to the conclusion that this task could not be undertaken with confidence. To establish the availability of data on migration related to the topics of this prospective study, the research team conducted a count of the occurrence of key concepts and relevant terms in selected documents. A frequency count of a key term serves as an indicator of the relative emphasis given to a selected term or topic in a document. The frequency of occurrence of the following terms (corridor, education, skills, vocational, TVET, leather, occupation, sector and industry) in selected documents is indicated in the table below.

► Table 14: Summary of frequency of key terms in selected documents

Article/resource name	Corridor	Education	Skills	Skilled	vocational	T/ET	Gender	Leather	Occupation	Sector	Industry
Labour Migration Statistics Report: 2nd edition 2017 (Executive summary) 2020		1					1		1	1	
Labour Migration Statistics Report: 2nd edition 2017 (Chapter on: Africa's population and migratory trends) published 2019							2				
Eight regional profiles: AMU, COMESA, EAC, ECCAS, ECOWAS, IGAD, SADC, CEN-SAD		16					27	0	15		1
Report on Labour Migration Statistics 2015 1st edition published 2017	2	20	8	9			10		9	22	1
Economic Development in Africa Report 2018: Migration for Structural Transformation (UNCTAD)	9	13	73	182	5	0	22	2	12	85	9
Sum of occurrences	11	50	81	191	5	0	62	2	27	108	11

The keyword search was conducted on information sourced and published by the following institutions:

- AUC Report on Labour Migration Statistics in Africa (1st edition), based on 2015 data published in 2017 (AUC 2017).
- AUC Report on Labour Migration Statistics in Africa (2nd edition), based on 2017 data and compiled in 2019 (AUC 2020).
- In addition, regional migration profiles linked to the above report were also mined for the keywords. These regional profiles included the Arab Maghreb Union (AMU), the Common Market for Eastern and Southern Africa (COMESA), the EAC, the Economic Community of Central African States (ECCAS), ECOWAS, IGAD, the Southern African Development Community (SADC) and the Community of Sahel-Saharan States (CEN-SAD).
- United Nations Conference on Trade and Development (UNCTAD) Report on Economic Development in Africa, Migration for Structural Transformation (UNCTAD 2018).

The results of the keyword search of the above documents suggest the following:

- The variables relevant to this study that are available in the above resources are limited. References to the leather sector are sparse.
- While the sources are a textual representation of various databases, it is envisaged that not much more will be found in the actual databases (raw data) on migration corridors.
- Therefore, the challenge for this study was limited empirical data on migration corridors, as was evident in the keyword search in the above reports on labour migration statistics.

- ▶ Further to this, no significant data could be sourced on occupations. As with migration corridors, only limited empirical data was found on occupations in the leather industry in accessible and quality-assured databases such as those of the ILO.
- ▶ It was therefore unlikely that there would be an easily accessible list of data sources to be consulted for the mapping of labour migration in the leather sector. A next step may be to explore the existence of area-level and small-scale studies on migration patterns and attempt to integrate this data, but that task is beyond the mandate of this project.





# 4

## Chapter 4 Leather sector characteristics and migrant worker participation: country profiles

### ► Introduction

This chapter comprises a set of country profiles intended to provide an overview of each country's leather sector and the presence and involvement of migrant leather workers. As a point of departure, the table below gives a birds-eye view of the overall demographic characteristics of migration across the six countries, demonstrating quite substantial variations where the presence of migrants, refugees and asylum seekers is concerned. Though this study focuses on migration and migrants, it is probable that the cumulative exposure of a country's population to the overall quantum of mixed migration will influence social sentiment as to the overall presence of migrants in their country, irrespective of their status. This sentiment is also likely to differ depending on whether or not migrants/refugees are visible to local communities, bearing in mind that "visibility" is not necessarily a question of numbers, but a product of identity consciousness, which may be more prevalent in some places than elsewhere. Differences in national policies applying to refugees and asylum seekers may favour encampment or freedom of movement, with a more or less fluid accommodation of refugees and asylum accommodation and their diffusion into local communities. These arrangements are also likely to affect employers' and indigenous workers' attitudes to migrant employment.

► **Table 15: Migrant stock, including refugees, asylum seekers and migrants, for Ghana, Côte d'Ivoire, Ethiopia, Rwanda South Africa and Kenya**

	Ghana	Côte d'Ivoire	Ethiopia	Rwanda	South Africa	Kenya
Country total population	31 072 000	26 378 000	114 964 000	12 952 000	59 309 000	53 771 000
Migrant stock including migrants, refugees and asylum seekers	476 412	2 564 857	1 085 517	513 907	2 860 495	1 050 147
Migrant stock including migrants, refugees and asylum seekers as a percentage of the total population	1.5%	9.7%	0.9%	3.9%	4.8%	2,0%

Source: UNDESA (2020, Table 1 and 6); World Bank (2020)

The country profiles of Ghana, Côte d'Ivoire, Ethiopia and Rwanda (Phase 2) are presented in this chapter. The profiles of South Africa and Kenya (Phases 2 and 3) are presented in separate chapters.

## ► Ghana country profile

### Introduction

Ghana Statistical Service reports on flows of migrant workers accurately reflect the two main geographical regions that most migrant workers come from: i) neighbouring (West) African countries and ii) Asia. While the participants in our survey, including the immigration official interviewed, could not provide any statistics, there was a general consensus that the countries in (West) Africa from which most migrant workers originate are Nigeria, Togo, Liberia, Niger, Mali, Burkina Faso and Côte d'Ivoire. The considerable presence of migrant workers from these countries was attributed to the ECOWAS Free Movement Protocol, which allows ECOWAS citizens to travel to other member states in search of socio-economic opportunities. For the Asia region, the most reported countries were China, Syria, Turkey and Lebanon. The presence of many migrant workers from these Asian countries was attributed to business and investment opportunities and, for the Chinese in particular, the opportunity to engage in small-scale mining.

The migrant worker population in Ghana has grown in recent years. However, there was no consensus among the interviewees as to the three countries from which most migrant workers originate. Some participants suggested China, while others were of the view that Nigeria, Togo and Côte d'Ivoire were the main sources of immigrants. Although the participants had no statistics or data to back their claims, there was general agreement that Ghana's migrant worker population has increased in the past five years. Interviewees from the small-scale leather segment and the shoemakers' association indicated that they had come to know migrant workers in the areas where they lived or worked.

### Sectors and occupations in Ghana in which migrant workers engage

Most migrant workers in Ghana aim to find employment or engage in business. They find employment in a wide-range of sectors, in particular the construction industry, mining, trade (both wholesale and retail) in all kinds of goods, phone accessories, agriculture, the leather sector, garment-making, food processing, metal work, vehicle repairs, the sale of spare parts, and the health sector. Oil and gas has become a key sector since the discovery and production of oil in commercial quantities in 2010 and migrant workers find employment in this sector because certification is less of an issue.

A common theme running through the interviews was that construction, small-scale mining and trade (wholesale and retail) are the sectors in which most migrant workers find employment. Which sector they work in tends to depend on their country of origin. It emerged that Chinese migrants are more likely to be engaged in small-scale mining and, to a lesser extent, construction, while ECOWAS migrant workers (from Nigeria, Togo, Burkina Faso, Mali and Niger) tend to find employment in trade, construction, spare parts and, to some extent, the leather sector. Moreover, many migrant workers, particularly those coming to work for the first time, rely on established networks and this has implications for the sector in which they find employment. For example, Nigerian migrants tend to rely on their networks to find employment in informal trading activities, whereas Nigerians are noted to dominate in the informal economy of Ghana.

In terms of skills, interview data shows that migrant workers possess skills across all skills levels, low, middle (i.e. technical) and high, and workers with different levels of skills may be found even within the same sector. In contrast, those who find employment in the informal sector, including those who work in trade (retail and wholesale), spare parts, leather, food and the beverage sector, tend to have relatively low-level skills. It was also observed that migrant workers, mainly those from ECOWAS countries, who find employment in the agricultural sector tend to have low-level skills.

One interviewee from an association of leather enterprises stated that some migrant workers in the leather sector possess middle (technical) to high levels of skills. In the same vein, the key informant interviews with personnel from the Ministry of Food and Agriculture indicated that the migrant workers who process leather into other finished products tend to possess higher levels of skills. However, the leather labour market also comprises workers with informal apprenticeship skills, artisan skills and skills in traditional leather work.

## Working conditions of migrant workers in Ghana

It is difficult to generalize as to whether migrant workers enter and exit Ghana through regular or irregular channels. A consistent theme of the interviews was that most of those who enter irregularly tend to be relatively low-skilled migrants from neighbouring West African countries such as Togo, Nigeria, Côte d'Ivoire and Burkina Faso. Despite the fact the ECOWAS Free Movement Protocol provides visa-free opportunities for ECOWAS citizens to travel to member countries to take advantage of opportunities in other member states, not all ECOWAS migrants enter or exit Ghana through regular channels. Participants affirmed that, in principle, arriving through irregular channels can present difficulties for migrant workers. Nevertheless, it seems that most migrant workers rely on their networks for support and survival. As observed by one participant: "Those who come into the country through irregular means do not find much difficulty since most of them have contact with some Ghanaians."

All the participants affirmed that migrant workers, including ECOWAS citizens, are by law required to have permits to qualify for employment. Nonetheless, there are many who do not have permits but are engaged in economic activities in the country. Interviewees noted that most migrant workers who lack permits tend to be engaged in informal jobs in, for instance, trade, wholesale, production and leather processing. The reason they can work, despite not having permits, is that most of them are self-employed in the informal economy and therefore are not subject to a rigorous recruitment processes requiring employers to check for documentation, which would include a passport or work permit. Our interview data suggests that migrant workers, particularly those with high levels of skills, who tend to find employment with companies and organizations in the formal sector, are likely to have short or long-term written contracts. On the other hand, migrant workers with low skills tend not to have formal contracts but enter into informal verbal agreements with their clients or employers, which sometimes causes difficulties for them.

## Migrant workers in the leather industry in Ghana

In this section, we analyse the data collected on migrants who work or find employment in the leather industry in Ghana. It should be noted that a few of the participants could not provide any information because of their limited knowledge of migrants' engagement in the leather industry. However, of those who could comment or provide insights, some suggested that, in comparison with other sectors (for example, trade and construction), the proportion of migrant workers seems to be small. On the other hand, others, particularly the key informants from the Ministry of Agriculture, were of the view that the leather sector employs a fairly large number of migrant workers, mostly in the northern region of Ghana. It should be stated that these contrasting perspectives were based

on the interviewees' own perceptions and encounters, rather than on the limited official data. According to the participants, accurate information of this kind is generally lacking.

It was reported that migrant workers in the leather sector come mostly from neighbouring West Africa countries, notably Nigeria, Burkina Faso, Mali, and Niger and, to a lesser degree, from Italy. Generally, the reason given for the significant presence of West Africans (from Nigeria, Burkina Faso, Mali and Niger), apart from the ECOWAS Free Movement Protocol, which provides visa-free opportunities for ECOWAS citizens, was that the native population has not yet considered the leather industry as a sector that can provide satisfying employment. In other words, Ghana is failing to exploit its potential in that there is a perception that most locally made products (particularly leather goods) are of low quality, in contrast to foreign products. This has resulted in a predilection among the Ghanaian populace for foreign leather products. Migrant workers from neighbouring countries seem to have capitalized on this sentiment to exploit business opportunities in the leather sector.

The occupations performed by migrant workers in the leather sector include manufacturing, processing, importing and exporting, as well as the retailing and wholesaling of leather products, particularly bags, shoes, sandals and other artefacts.

The vast majority of migrant workers in the leather sector are male. This is unsurprising, given that migration in the African context has over the years been highly gendered. According to the interviewees, in addition to the physically demanding nature of work in the leather sector, traditional gender roles have limited the migration of women. In the leather sector, men would seem to have better access to resources and the wherewithal to participate in mobility. This is not to say that females never engage in mobility to find employment in the leather sector. Indeed, the interviewee from the shoemakers' association suggested that the proportions of migrant workers in the leather sector are likely to be 30 per cent female and 70 per cent male. Nevertheless, this confirms the view that, in general, migration in search of employment is a traditionally male-dominated phenomenon in Africa.

In terms of skills, a consistent theme of the interviews was that most migrant leather workers tend to possess low-level skills, albeit higher than those of locals. The reason for this is that many are engaged in the wholesaling and retailing of leather, which, according to the participants, does not require high-level skills. However, some participants were of the opinion that the tasks involved in leather processing and manufacturing require high levels of skill. Moreover, they noted that migrant workers in the leather sector who are engaged in manufacturing and processing tend to be highly skilled.

Further analysis of the qualitative interviews shows that, in most cases, migrant leather workers tend to find employment in small enterprises (up to 10 employees) in the informal sector. One participant, however, noted that most migrant workers tend to work in very small micro-enterprises (one to five employees, based on the classification provided by the Ghana Investment Promotion Centre). Rather than finding work with owners of small enterprises, most migrant leather workers are self-employed or own their own businesses, and they tend to employ a few Ghanaians. That said, the Ghanaian leather industry has been slow in formalizing and is seen as a micro-enterprise-dominated domain.

The factors that emerged as to why most migrant workers tend to find employment in the informal leather sector were that established migrant networks facilitate their employment, and the fact that the leather sector itself is very much characterized by informality.

## ► Côte d'Ivoire country profile

### Introduction

The Côte d'Ivoire economy grew strongly between 2013 and 2020. Most growth was in resources, in particular oil and gas and the agro-industry, followed by telecommunications, logistics and banking services, then the retail, food and beverages and manufacturing sectors, while renewable energy and construction were also part of the mix.

Manufacturing is largely concentrated on the refining and processing of agricultural produce and commodities, such as rubber and fuels, whereas demand for manufactured goods has been largely met through imports. During the last decade, roughly two thirds of the Ivorian people were employed formally or informally in agricultural activities. Manufacturing accounted for only around 6 per cent of employment, consequently that poor domestic manufacturing capacity makes Ivory Coast very reliant on imports of consumer goods.

In terms of added value, some growth is likely in food processing and textiles, but not specifically in leather. There is only limited development of formal manufacturing in general, and this applies to leather goods and footwear manufacture. An additional problem is that, in general, hides have to be imported from other countries as local quality needs to be improved. Also, plans for local processing of hides have not come to fruition due to environmental concerns related to the treatment and tanning of hides, and their potential impacts on important water sources. However, in spite of these constraints, evidence from interviews suggests that the informal leather sector has seen growth and diversification in the recent past.

### Awareness of migrant workers in the leather industry in Côte d'Ivoire

Participants indicated that migrant communities were behind the development of leather working in Côte d'Ivoire, and all the Ivorian artisans interviewed indicated that they had either been trained by a migrant worker or had been trained by an Ivorian leather worker who had himself been trained by a migrant. The very first leather artisans (all in the informal sector) were primarily Ghanaian and Senegalese. They occupied the space with virtually no competition from Ivorians and tended to work as shoemakers and repairers. The sector has grown, though there are no official figures available, with increasing numbers of people interested in making accessories (African print and leather bags, belts, home décor items, shoes, etc.). The ratio of Ivorians to non-Ivorians in the leather sector seems to have become more evenly balanced. Even so, there are still significant numbers of migrants in the sector, primarily from Ghana, Senegal, Niger, Mali and (to a more limited extent) Burkina Faso.

### Leather-related occupations performed by migrant workers in Côte d'Ivoire

The leather sector in Côte d'Ivoire is primarily informal, so that even formalized enterprises assume informal characteristics. Most of those working at different stages of the value are men, though the participants indicated that women tend to be more visible in retail and in manufacturing accessorized bags, shoes and clothes. These women tend to be Ivorian. Migrant workers tend to be involved mainly in sales of both leather (the skins, which are mostly imported) and leather products.

The areas most closely associated with leather work in Côte d'Ivoire include Treichville, a part of Abidjan, where most skins/leather businesses are Senegalese or Lebanese-owned. In Daloa City, the traders selling skins and leather shoemaking items are primarily Nigerian. Korogho also hosts leather-working activities, but to a lesser extent. The communities most clearly associated with leather working previously, namely the Ghanaians, Senegalese and Nigerians, brought their expertise from their respective countries and were known for the quality of the sandals they produced and the fact that they dominated the space, facing no competition from local Ivorians. Now, even though an increasing number of Ivorian artisans have entered the field, migrant workers continue to be dominant.

## Working conditions of migrant leather workers in Côte d'Ivoire

Migrant workers have, in many cases, benefitted from social mobility, such that they now own shops and outsource the manufacture of shoes and other leather products to leather artisans, who may often be Ivorian nationals. Some migrant workers also have their own workshops, where they manufacture the leather goods for sale in their shops. Many migrants have entered the field, either by being asked to join a family member in Côte d'Ivoire to learn the trade or through friendship, whereby a parent requests that one of their children (usually one who has dropped out of school) learns the trade through an informal apprenticeship. Yet another way in which migrant workers become leather workers is through sheer personal interest.

The leather artisans/traders we interviewed were all self-employed and had a small number of apprentices or collaborators with whom they worked. About half were Ivorian and the other half migrant workers, one being a descendant of an international migrant. The interviewees all indicated that there are no administrative barriers to the informal sector in Côte d'Ivoire. The *Chambre des Métiers* also indicated that they work with Ivorian and non-Ivorian artisans indiscriminately, and that their services are available to all artisans who want to be registered with the Chamber. While work permits are not required for work in the sector, there are no safety nets, whether for Ivorians or non-Ivorians.

## ► Ethiopia case study

### Introduction

The leather sector in Ethiopia is expanding rapidly, driven by the strategic interests of the Government and international investors. It provides considerable opportunities to create employment for youths and adults, nationals and migrants, at different levels of the workforce, in large international factories as well as in small and medium-sized enterprises.

### Awareness of migrant workers in the leather industry in Ethiopia

The interview results indicated that there was minimal awareness and a lack of data on migrant leather workers in Ethiopia due to a general lack of information on migration. There is more information on refugees from Eritrea and Sudan who are working in the textile sector. While the data on migrant workers is scarce, there is more information on internal migration. It was however mentioned that, in earlier times, the Government had brought in experts from the Indian Leather Development Institute and assigned them to different leather factories for the purpose of skills transfer. International companies have brought high-level leather experts from Asia and Europe into the country, including experts from China, India and Italy. A few Africans from Eritrea, Somalia and Sudan are also present.

### Sectors and occupations in Ethiopia in which migrant workers engage

The major sectors in which migrants engage, other than the leather sector, include textiles and garment-making, construction, metalwork, agro-processing, chemicals, mining and the making of ornaments. Most of these workers are sponsored by their employer companies. Refugees are enabled to participate in the workforce by attending short-term training facilitated by international organizations such as the *Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH* (GIZ), the ILO, and the UNIDO.

Polytechnic colleges provide integrated training in services, garment-making, construction and metalwork for both Ethiopians and refugees, but not for migrant workers in those sectors. There is no data on the numbers and skills levels of these migrants. More attention is given to internal migrants and returnees.

There are many companies owned by Indians, Israelis and Turks producing various products, for instance safety clothing and t-shirts in the Bole Lemi Industrial Park. Most of these factories have migrant workers participating as high- and middle-level management trainers. The factories provide on-the-job training for their workers to increase their skills and improve productivity, especially for those from rural areas.

The leather sector in Ethiopia is booming, and its products are in great demand among Ethiopian and foreign investors; in fact several international companies are involved in the leather industry. Training in leather-goods manufacture is in high demand among Ethiopian youth and women as a way into self-employment. The informal production of leather goods is also favoured in households due to its cost-effectiveness, as having a sewing machine and a little space is sufficient to start production. There are many people, both nationals and migrants, who work in leather informally, making such items as wallets, belts and bags and selling them to big companies. The sector relies very much on family businesses. Some leather workers make leather goods informally in their homes in their free time and



sell them to shop owners. It is also the case that migrants are working informally in leather-goods and shoe production, though the numbers involved are unclear.

Despite Ethiopia being a leader in the production of hides and skins, one problem is the lack of a skilled workforce. The participation of skilled individuals from other countries is therefore required. These migrant workers are brought in by national and international companies that then export their leather and leather goods. The number of foreign experts who work at technical and supervisory levels is low – not more than 10 per cent of the total workforce in the leather sector. On the whole, companies recruit Ethiopians for their production lines and provide them with job training.

## Working conditions of migrant leather workers in Ethiopia

The leather sector is the Government's priority sector for foreign investment. The Ministry of Labour and Social Affairs and its regional bureaus are responsible for organizing, coordinating and following up employment services and employment exchange. From this point of view, interviewees were adamant that, provided they respect Ethiopia's legal requirements, migrant workers have full rights to participate in the labour market.

However, there are some challenges, in particular barriers in communicating with subordinates and cultural differences. Experts introduced by international companies can speak English, so they can communicate easily, but other migrants speak only their own languages, which creates difficulties. Moreover, gaining access to finance and procuring production machinery is also a big challenge.

There are wage gaps between national and migrant workers across all regions and most sectors, and this warrants specific attention. These gaps can be only partly explained by objective differences in experience, education, occupational skills and other labour market characteristics. However, the leather sector, like the textile and garment sectors, is much better organized in offering formal employment contracts, in contrast with the metal and construction sectors, where it is not very common to offer formal contracts unless people are hired permanently.

Regular labour migration to Ethiopia is largely limited to the highly skilled: senior management staff, often from Asian countries, brought in by foreign companies or expatriates working in the aid sector. Work permits are required for regular employment in Ethiopia and are generally not issued for other skills levels, so as not to disadvantage Ethiopian nationals searching for jobs. Foreigners are allowed to reside and work in Ethiopia for four years and their employment contracts must be renewed annually. However, there are limitations on the assignment of certain positions, and the permitted number of foreign employees in a company depends on the company's size. The main purpose of having migrant workers is for skills transfer. This is required by the procedures of the Ethiopian Investment Commission. There are safety measures in force and a minimum wage.

## Migrant workers in the leather industry in Ethiopia

Ethiopian businesses work in partnership with foreigners to get technical support and information on the needs of their business customers. Through these networks, Ethiopian businesses are able to source specialized machinery, such as tools for cutting leather. These interactions have enabled formal and informal Chinese producers based in Ethiopia to make leather products and sell them in the country. Markets such as Merkato provide Chinese business owners with access to distribution networks in other African countries, such as Uganda, Eritrea, Somalia and Kenya, which are open to sourcing good-quality leather products from Ethiopia. Individuals from Somalia and Kenya have attended short-term training at the Ethiopian Leather Development Institute and have been certified in leather technology. International organizations such as GIZ, the ILO and the UNIDO are working on capacity building for migrants and cooperatives, including in the leather sector.



## ► Rwanda case study

### Introduction

There are plans to achieve higher productivity and greater added value in Rwanda's leather industry by increasing the level of industrialization. This is being driven by the Ministry of Trade and Industry and the National Industrial Research and Development Agency.

### Migrant workers in the leather industry in Rwanda

In general, migrant workers in Rwanda originate from African countries such as Kenya, Tanzania, Burundi and the Congo, as well as from China, India and Europe. They tend to find employment in the construction, manufacturing, processing, cosmetics, textiles, business and services sectors. African migrant workers, especially from East Africa, possess low to mid-level skills,

There is an awareness that the number of migrant workers has increased in the past five years as the country has developed and promoted its industrial sector. The proportion of migrant workers employed in leather, as compared with other economic sectors, is reportedly low because the leather industry is in the early stages of development and the main focus is on tanning.

### Migrant workers in Rwanda

Four abattoirs and tanneries owned by Rwandans are involved in processing leather and hides. According to interviewees, there are companies that employ migrant workers in the Kigali and Bugesera Industrial Zones. They employ some migrant workers, mostly from Kenya, China and India, because they are more highly skilled. Chinese and Indian personnel are seen as the most highly skilled in processing and manufacturing, Indians are viewed as most skilled in green technologies, while Kenyans have expertise in entrepreneurship. Most African migrant leather workers occupy production-manager positions requiring middle-level skills.

### Working conditions of migrant leather workers in Rwanda

When migrant workers enter the country, they tend to pass through regular channels because it can be very difficult to live in Rwanda as an irregular migrant. Migrant workers are required to have a work permit, which is said to be easy to obtain. One reason for this is that there is free movement in East Africa and borders are not closed. However, some people may be employed informally, especially in the cities. This may facilitate irregular migration into the country, but only a few choose this path.

Migrant workers may be offered short or long-term contracts. With regard to wages, it was observed that migrant workers are paid according to their skills and the jobs they were hired to do and so earn relatively high salaries compared to local workers.

It was further observed that migrant leather workers are predominantly male and work especially in processing and manufacturing. However, the number of local females in the footwear sector is said to be increasing. Most migrant leather workers are employed in medium and large-sized formal-sector companies; only a few work in small and informal-sector businesses.





# 5

## Chapter 5 Migrant workers in the leather industry in South Africa

### ► The South African context

Migrant workers are present in rural and urban areas in every province, with main concentrations in densely populated, urban formal and informal settlements. The view that South Africa's borders are easy to cross and that migration volumes have been increasing is widespread, but difficult to verify with accuracy. Several countries and regions were mentioned as points of origin. The countries with most mentions, in descending order, were Zimbabwe, Lesotho, Swaziland, Mozambique, Malawi, Ethiopia, Kenya, Zambia and Somalia. Non-African countries mentioned were Italy, the United Kingdom, China, Brazil, India, Pakistan and Bangladesh.

Considering how migrants might select an intended country of destination, we can also pose the following question: In the case of a migrant who has leather-working skills and experience, how important are general perceptions of a destination country, for instance South Africa, with perceived low barriers to entry and a relatively large economy, as opposed to better employment prospects in a smaller country known to have a sizeable leather sector? This question is posed to bring into focus the relevant strength of the different factors that may contribute to the decision of a migrant with occupational and or sectoral experience and skills to select a destination country. The question is relevant since it probes whether migrants with skills, for instance in leather-working, would tend to converge on certain countries, resulting in higher numbers of leather workers migrating to a particular country.

Participants observed that migrants tend to find work in sectors such as construction, agriculture and domestic work, but also as teachers and truck drivers. Mention was also made of migrants in informal "sidewalk" trading, "tuckshops" and more substantial family-owned retail shops selling consumables, mainly in urban townships, but also in smaller, intermediate towns. Other migrants were observed to work in the hospitality industry, as waiters in restaurants, as labourers doing landscape gardening, and as informal security guards for parked cars in entertainment precincts.

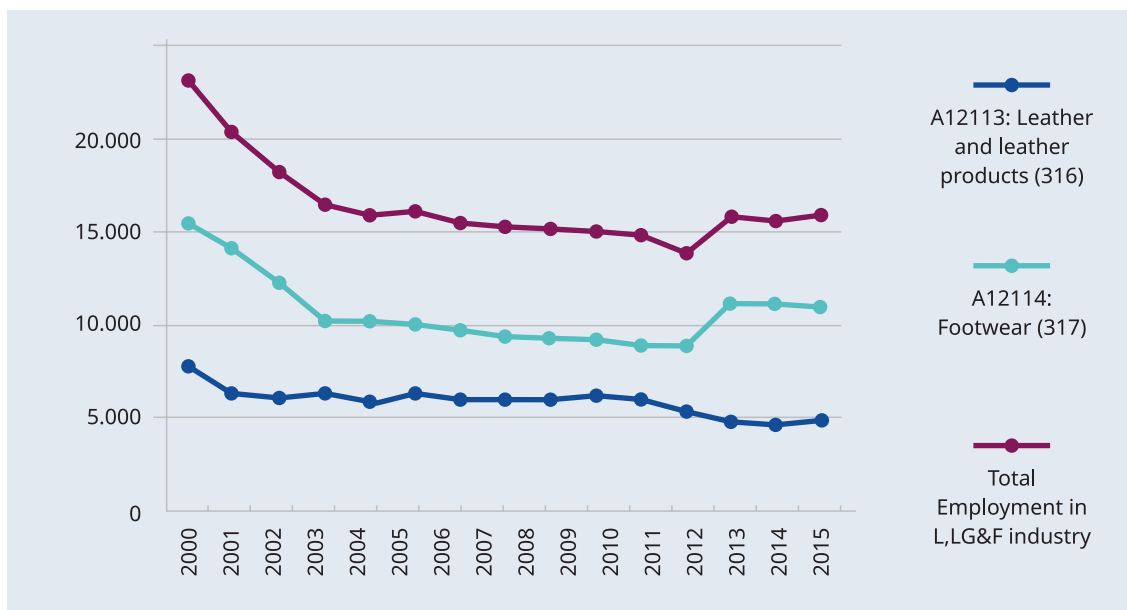
It is perhaps axiomatic to state that the leather sector, i.e. the occupation of working with leather as a productive activity, exists in every national economy in some form, since leather and its substitutes constitute a range of products and goods, especially footwear, that are basic, essential items of human clothing and accoutrements. This being the case, might the flows of leather migrants be bi-directional? This would depend on whether people who have leather-working skills and experience in their country of origin are motivated to migrate to a destination country which they know to have an equally strong or stronger leather sector. This is very likely in the case of Lesotho, for instance, which has strong ties economically and culturally with its immediate neighbours. The leather sector

in that country has benefited from advantageous trade subsidies, such as the African Growth and Opportunity Act (AGOA).

## Migrant employment in the South African leather industry

To get a sense of migrant workers' participation in the leather sector of a destination country, an overview of the formal leather industry is necessary. In South Africa, the formal-sector labour force is relatively well served in terms of a governance framework, adherence to sector regulations and the involvement of organized labour. In addition, South Africa can provide sound data on the formal employment of nationals and migrant leather workers, which is a key asset when undertaking a labour market analysis. The South African industry is segmented into three sub-sectors: tanning, footwear manufacture and leather goods manufacture. This reflects differences in the types of item produced and in the activities, processes and resources employed, in particular the relevant skills and technologies. The profile of occupations and skills needed for tanning differs markedly from those required in footwear and in leather goods manufacturing, whereas, the latter two sub-sectors being more easily comparable. Footwear and leather goods manufacturing are in fact the biggest employers of leather-sector workers. Proportionately more attention will therefore be paid to analysis of these two sub-sectors.

► **Figure 2: Employment trends in the leather, leather goods and footwear industry of South Africa (2001- 2015)**



Source: Institute of Creative Leather Technologies (2016,83)

In the last three years, the sector has not grown due to an economic recession, and recently the COVID-19 pandemic has affected performance. This is reflected in flat employment numbers. In total, the sector, including tanning, general leather goods and handbags and footwear, employs about 15,000 workers (Institute of Creative Leather Technologies (2016,83) ). The profile of skills demand and supply in the leather sector is shaped by growth sentiment among enterprises, the capacity of enterprises to invest in production technology and the relative competitiveness of

domestic leather products in local and export markets. Employment demand in the South African leather sector has held steady over the past five years.

Where the spatial footprint of the leather industry in South Africa's cities is concerned, the biggest concentrations are in the KwaZulu-Natal province, between the "hubs" of Durban and contiguous areas of Chatsworth, which is surrounded by informal residential areas, and in Pietermaritzburg-Pinetown. There is a secondary concentration in Greater Cape Town, with a smaller cluster of firms in the area of Port Elizabeth and nearby Great Brak. Concentrations of smaller producers occur in Cape Town, the Eastern Cape, Durban and particularly in Gauteng. As the most concentrated and populous province, Gauteng is host to businesses across all three sectors, especially tanning. These urban locations are likely to be points of destination for migrant leather workers, especially those who aspire to be employed in the formal sector.

According to the National Bargaining Council of the Leather Industry (NBCLI), in 2021 there were 669 migrant workers<sup>2</sup> in the formal leather sector (Leather: Footwear, General goods and handbags, and Tanning) who constituted 5.07 per cent of the leather-sector labour force registered with the NBCLI. In contrast, the number of migrants working in the wider leather sector is difficult to assess or estimate.

In South African formal leather businesses, lower-skilled positions tend to be occupied by females. Women by and large tend to work in the production process and in administrative roles.

## ► Profile of the leather industry in South Africa

### Leather tanning sub-sector

In 2020, there were 27 tanneries operating in South Africa, with half of the firms located in the densely populated Gauteng province. The tanning workforce has been in long term decline: from 9,242 workers in 2005 to 4,806 in 2015 and 3,063 in 2020 (Venter 2015). This brings raises the question of whether companies operating in a sector with a declining workforce would tend to increase or decrease migrant worker hires. There is some variety in this sub-sector in terms of size and market focus. The two largest tanneries specialize in automotive leather and have contracts with big car manufacturers. Most of their products are exported. Tanning for vehicle leather upholstery has declined substantially over the past decade and this has occasioned a corresponding decline in the South African Export Automotive Leather Sewing Industry (SAAELI). Activities related to automotive leather are noted here, though they come under an automotive manufacturing Standard Industrial Classification (SIC).

The next type of mid-sized South African firms (small from an international perspective) are tanneries supplying the footwear and furniture value chains. Other specialized tanners focus on taxidermy and are dependent on the hunting-tourism market; they specialize in the tanning of crocodile skin and exotic game hides. The tanning sector is not viewed as a significant draw for migrant workers. Compared with leather manufacturing, a higher proportion of the tanning workforce comprises elementary workers. Another important difference between tanneries and manufacturing businesses is that the former work throughout the year as they keep receiving hides from abattoirs, whereas the leather goods and footwear industry, have a low season from January to May. During this period, the seasonal nature of the work encourages manufacturers to employ informal and migrant workers.

<sup>2</sup> This is based on workers with a foreign passport registered on the NBCLI list.

## Changes in the structure of the leather manufacturing industry and related employment patterns

The historical evolution of leather manufacturing has been shaped by how formal enterprises have responded to difficult operating conditions to maintain profitability. The formal leather sector originally consisted of several large companies that produced branded footwear. Senior management was from the United Kingdom and Europe, but this changed as the Government was intent on developing local citizens' skills, and skills transfer took place with the training of supervisors, managers, directors and business owners. Skills gaps were slowly reduced, and industry skills were benchmarked internationally. Even so, there is still considerable demand for highly qualified personnel such as technologists and senior technical managers.

Things changed due to the consolidation that took place as South African firms were exposed to international markets and global competition, the result of liberalizing the South African leather sector in the 1990s. Opening the leather trade to global markets released imports onto the local market. This disrupted local production and, as a result, uncompetitive firms closed. In this phase, management buy-outs and unbundling took place. Over time, as employment in the leather industry declined, people with experience and skills left the larger companies, sourced finance and began to set up small businesses, even in homes. The larger firms could then outsource parts of the production process, which could be done more cheaply by small firms than in house.

Companies adapted by decomposing production into an "outwork" system, whereby smaller units of production were distributed to subordinate enterprises. In footwear, the senior companies determined the price they would pay to cut-trim-make (CTM) enterprises, and this resulted in lower wage rates in the CTM enterprises concerned. The end result of this process was that work involving hand skills that could be done in workers' homes, paid on a piece-rate basis, was taken up by small and micro-enterprises (SMEs). The transformation is clearly visible in the KwaZulu-Natal footwear sub-sector of formal, larger-sized firms and semi-formal micro, small and medium-sized enterprises (MSMEs). As a result of this transition, the average size of companies decreased to their present size, so that the industry now consists mostly of MSMEs.

In view of these factors, in 2009 South Africa's Department of Trade and Industry instituted the Clothing and Textiles Competitiveness Programme (CTCP) to build capacity in the apparel and leather value chains and make them more globally competitive. The provisions included a 100 per cent local content requirement and the reintroduction of products (e.g. technical fabrics and protective footwear) that had been dropped by manufacturers. Since the Government wanted to achieve faster growth, over a billion rand was invested in revitalizing the industry, including the introduction of more sophisticated technology and machinery. This upgrading seems to have contributed to a mismatch between the available skills and skills demand.

A measure was put in place to protect employees in the small firms, whereby the large client firms are required to comply with Labour Bargaining Council rules. If a formal producer has a contract with its employees, then the large client must comply with the said rules. Most employers in the manufacturing sub-sectors tend to adopt fixed-term contracting. In response to wages in leather being higher than in clothing and textiles, the number of smaller, informal firms rose.

Over time, the leather industry evolved a three-tier structure:

- a. *Formal established firms* – either large or medium-sized
- b. *Semi-formal enterprises* – reflecting the declining number and size of formal firms, and
- c. *Informal leather enterprises*

The three types of enterprise differ in terms of the difficulty in accessing them experienced by migrant workers, from the most difficult to enter (formal firms) to the least difficult (informal firms). One of several barriers to entry for migrant workers is the need to have the required qualifications,

skills and experience. An aspect which the three-tier framework does not make clear is the informalization of the leather workforce as a result of seasonality, whereby migrant workers, and some nationals, are employed on a casual basis.

Currently, the industry focuses mainly on local demand. In the footwear sub-sector, the main product lines are industrial leather, school shoes and fashion footwear. The fashion segment has declined somewhat due to people's tight financial circumstances, with domestic consumers focusing more on value than on choice. Consumer buying patterns have shifted towards seeking value for money, rather than up-market products.

## ► Informal-sector employment of leather workers in South Africa

The informal employment of leather workers is quite differentiated in terms of the circumstances in which they work. This is fairly typical of the informal sector as a whole, but this variety makes for difficulty in regulating the leather sector. The implementation of RPL systems will have to take this into account. Interviewees referred to the existence of informal-sector leather businesses performing a wide range of activities, from shoe-repair and cobbler services on the pavement to hand-crafted leather goods sold direct to the customer or through market vendors or small shops. In South Africa, leather work in the informal sector is very varied and includes:

- Leather handicrafts, hand-made belts, wallets etc.
- Shoe repairs
- Making traditional leather items, in some cases from wild antelope (e.g. duiker) skins, for instance leather shawls, sandals (*rampechana*), grain bags and quivers for arrows
- Small-scale tanning of skins
- Artisanal footwear and leather goods
- Leather hunting accoutrements (belts, gun covers, knife scabbards, etc.)

Workers engaged in these activities often develop multiple production skills. They may sell their products directly or feed them into the businesses of informal traders.

It was observed that there are many informal, small and micro footwear manufacturing units in the main centres of the leather industry. However, the number of informal leather and craft-related workers in South Africa is difficult to estimate, as is the proportion accounted for by the informal-sector labour force.

Although migrant leather workers are employed in the informal sector, the size of this group is unknown and difficult to estimate with any reliability. This raises question as to how much the migrant workforce would benefit from the deployment of skills recognition systems. On the other hand, it is clear that skills recognition would equally benefit the South Africans who are unemployed or who work in the informal sector. It would be difficult, if not counterproductive, to implement such systems if, as a matter of policy, they made distinctions between the national identities of workers wanting to take advantage of the opportunity.

In South Africa, undocumented migrants cannot always be sure when their presence and identity will not be raised as an issue, either privately or publicly, by South African nationals. Consequently, migrants who work in the leather industry are not necessarily "visible" in everyday city and township life, except for shoe repairers or cobblers. Shoe repairers can be quite commonly seen on pavements and street corners with the tools of their trade around them. Their services are much more affordable than those offered in formal footwear specialist stores.

## From production to distribution and sales of leather goods and services

Though this study is primarily focused on skills related to the production of leather items, we need to refer to the participation of migrant workers in the leather industry who intermediate between production and the market by supplying hawkers and by retailing through their own shops and those of others in their networks. In the cities, especially the inner cities, informal sales of leather products take place in thoroughfares. The point needs to be made that these intermediaries, who bring informal goods to customers, are necessary in getting products into the market. Migrant leather workers may want to avoid selling their own goods in public, preferring to sell through intermediaries. This means that intermediaries are a key element in the success of the informal leather trade.

## Employment of leather workers in unregistered manufacturing companies

So far, we have analysed how a large proportion of migrant workers in leather-sector jobs work without having obtained regular/documented status and, as a result, end up working in the informal sector, with only limited protection. Far less attention has been given to undocumented or illegal factories in South Africa that operate without the oversight of agencies such as the Department of Labour. These factories, being clandestine operations, tend to place severe restrictions on the freedom of their workers so as to remain under the official radar. Conditions in these factories may involve human rights abuses and exploitation. To remain undetected, the factory owners prefer to employ irregular migrants, who are vulnerable and unprotected. Some of the operations that have been shut down were manufacturing clothing, textiles and synthetic leather products.

### ► Policy implementation in South Africa

Problems are evident in the policies and Government services concerned with migrant workers. Even though “people with high skills typically fly into the country”, there are bureaucratic hurdles. Businesses looking to bring in skilled migrants have encountered difficulties with applying for permits for workers from abroad, partly due to complex and time-consuming processes. Better coordination between the immigration authorities is needed, so that different departments can jointly facilitate the immigration of people with the skills in high demand. The prevailing conditions make it difficult for the transfer of skills from foreign experts to nationals working in the leather industry.

For migrants from developing countries, it is claimed that recognition of certificates is a bottleneck. The problem lies with the accreditation of certificates issued by foreign technical and higher-education institutions. Interviewees observed that migrants from Pakistan or Bangladesh possess qualifications that “are not supported in our (SAQA) environment, and that is why they go to the informal sector where they are underpaid”. People applying for citizenship experience difficulties and delays, which further contributes to irregular entry to the country on the part of migrants. This, in turn, leads migrant workers to have recourse to the informal sector.



## ► Skills demand and recognition in the leather sector in South Africa

### Skills demand

Understanding the distribution of skills among migrant workers in relation to demand is important for this study, be they formally recognised through qualifications or acquired through informal learning and experience. This information is necessary in assessing the potential value of skills recognition as a way of making best use of the skills that migrant workers bring to the destination country's labour market.

Most migrant workers coming to South Africa with high-level skills in the leather industry, for instance in chemistry, production engineering and management, are supported through the immigration process by their current employer, in the case of an international company, or by their South-Africa-based employer. There are obvious advantages to the migrant if she/he can demonstrate that she/he has an employment offer or contract. The employer would have to negotiate the contract with reference to South African legislation that ensures citizens' rights to employment in general and the rights of historically disadvantaged groups. For this reason, in certain categories of job, migrant workers will need a "special skills visa". Negotiation of this dispensation is informed by the South African Department of Higher Education and Training's "National List of Occupations in High Demand" (see DHET, 2020 for the current list).

There would seem to be a demand for particular functions and levels of skill. To some extent, the industry itself generates people with the skills and experience needed to take on senior management roles, and non-African migrants tend to be employed at higher skill levels under arrangements linked to foreign investment. There are expectations that skills transfer will take place through shadowing or mentoring. At very high skills levels, this is not a practicable mode of transfer. When it comes to the introduction of new technology, such as digitization, transfer is of course possible. Or take the case of an Italian equipment supplier who sends a technician to teach people to operate equipment in a particular area of production.

But for high-level skills, the Government has had to bring in trainers from the Central Leather Institute (CLI), who were based in South Africa for one year to provide training, rather than importing skills, and there has been a similar arrangement with the United Kingdom (Northampton University). The South African Department of Trade and Industry (DTI) also has a joint programme with a company in Italy, which sends an expert once or twice each year. Selection of these migrant skills is determined by future design trends and fashions.

According to South African footwear employers, migrant leather workers coming to South Africa from other parts of the continent are mostly low-to-medium-skilled. This is premised on the observation that in Africa the leather industry remains largely a craft occupation, with a great deal of work performed by hand or with only limited mechanization. In the main, these labour-intensive forms of production depend on table handiwork and hand-stitching, rather than machines. Consequently, employers tend to presume that if a migrant comes from a country that is not technologically advanced, they will probably lack machine-operating skills. The first hurdle would therefore be the gap between hand- and machine-related experience and skills.

The South African leather industry, especially the medium and large firms, has experienced different stages of technology integration. Over time, companies having migrated to more advanced systems and machines and would prefer operators to have relevant experience under their belts. Companies are sceptical of the benefits of recruiting migrant workers not having the same sort of background: "For jobs on the bigger machines, they would require some level of training if they don't have it already".

In big companies, workers can be selected from the internal labour market for upgrading to new production positions with less disruption or effort. This strategy also demonstrates an employer's commitment to promoting current members of the workforce. On the other hand, small to medium-sized enterprises with smaller staff numbers may well need to fill gaps by appointing new staff and be more flexible in their hiring strategies. In contrast, interviewees from larger companies were keen to emphasize their commitment to local employment and were also more inclined to operate fully in line with Government policy.

A further hurdle for migrant workers in accessing jobs in the formal leather and footwear manufacturing sector derives from the way in which skills development and training is structured. The South African national skills development and training model is funded through a skills levy grant scheme, whereby firms are expected to provide training by collaborating with SETAs. Firms earn rebates against their levy for providing SETA-approved training delivered by accredited industry providers. This skills development is industry-specific and depends on agreements between companies and training service providers, funded by the relevant SETA. Programmes of this kind arranged among the three parties are not necessarily open for public consumption. For this reason, migrant workers - and for that matter citizens not employed in the sector - do not enjoy access to such programmes. Also, many training courses and programmes are offered by individual firms and are tied to specific innovations in production and the acquisition of new machinery, with access only for the workers directly involved.

Even if a migrant worker were employed in a footwear manufacturing environment as a relatively inexperienced recruit, he or she would have much to learn, not only in terms of skills, but in general familiarity with the environment. According to employers, migrant workers seeking jobs in the leather sector tend to possess elementary-to-intermediate skills. They would need training to induct them into the practices, routines and roles of their new workplace, and then to fulfil particular roles. Many migrants are said to be employed as general workers.

Then, for employers, there is the need to assess a migrant's skills. A migrant looking for work with a manufacturer might be given an employment opportunity if he could demonstrate certain skills. This is where giving a worker a trial period comes in, and here employers differentiate between having skills and having a qualification, arguing that the latter is not necessary, especially if training is mostly given in house.

The discussion thus far has identified factors that could help or hinder the employment of migrant leather workers. The following section focuses on skills recognition as a strategic option. What emerges is that there are several policy issues to be resolved if skills recognition is to have the desired impact. Skills recognition is, to a greater or lesser extent, dependent on other factors, such as the cost of providing it and the cost of other policy interventions required if skills recognition is to take effect.

The former Leather Industries Research Institute, based at Rhodes University, offered training in footwear manufacture and tanning, but closed in about 2000. Currently, there are no training programmes available for footwear. However, for tanning an Advanced Certificate in Leather Technology in Tanning is offered at the International School of Tanning Technology (ISTT) in Grahamstown, Eastern Cape. The qualification is rated at the South African Qualifications Authority NQF 4 level. Short courses and intermediate courses are also offered at the ISTT.

The imparting of skills in the leather sector is currently the responsibility of enterprises and the relevant SETA, as opportunities to prepare for a career in the sector through study at a post-school TVET college or higher education and training institution are very limited.

Currently, there has been some progress in using RPL to facilitate skills development in the leather workforce. The practise is for leather enterprises and enterprise associations to work with the SETA to formulate curricula and programmes, and implement these without a formal recognition process.

This can be seen as a gap in facilitating skills acquisition, not only for migrant workers, but also for South Africans leather workers who may have accumulated decades of experience but have no

formal qualification to show for their pains. Given this gap, employers may well be slow to adopt RPL for migrant workers if they do not see the value for their own workforce. It may therefore be good strategy to adopt a national RPL system that targets both migrant and national workers.

## Skills recognition

In South Africa, the concept of skills recognition is embedded in all recently developed occupation-related curricula under the direction of the South African Qualifications Authority (SAQA) and the QCTO. Although skills recognition and RPL are widely accepted in South Africa, some practitioners in the leather industry see them as a requirement only when an intermediately skilled worker envisages pursuing an academic qualification. In other words, RPL is viewed as a means by which leather workers with experience can bridge the gap between their vocational and technical training and higher education.

Interviewees observed that migrant leather workers arrive in the country mostly as unskilled or medium-skilled workers. However, there has been no progress in applying skills recognition to facilitate the transition between the low-skilled and medium-skilled levels. This is because the South African leather sector has evolved its own system of service certificates. An employer issues service certificates to all employees who are made redundant or leave service. Work experience, length of service and job responsibilities are all recorded on a service card, which a worker can produce when applying for a job, and which provides a traceable reference that can be verified. The work experience that an employee has on her/his card is recorded on a database held by the Bargaining Council and constitutes a source of validation.

This system of verification based on logging the acquired skills and experience of a leather worker obviates the need for RPL if it provides sufficiently reliable evidence for employers to make hiring decisions. This card-based system is functional in the South African leather sector, where most skills development and training are undertaken, either by employers themselves or through programmes facilitated by the SETA responsible for training and skills development in the leather industry. This is the FP&M SETA. All registered companies in South Africa are required to contribute to a skills levy to incentivize workforce training. Skills levy funds are used by the SETAs to coordinate the efforts of skills-training service providers and employers and provide a range of services for enhancing the skills and quality of the workforce.

The card-based system recording workers' experience is effective because it is supported by the Leather Industry Bargaining Council, a statutory body responsible for co-regulation of employment relations and conciliation in the sector by facilitating collective agreements on conditions of employment. The system works because the parties involved cooperate under the overarching authority of the Bargaining Council. The rules are clear: they require a worker to be a member of the participating workers' union and to be hired by an employer, who is a signatory to the collective bargaining agreements. Consequently, these cards have operational validity, as compared with a certificate or a digital badge attesting to the possession of theoretical skills that may not necessarily be related to particular machinery or what transpires on a leather manufacturer's shop floor. The cards, though not attesting that the holder has a qualification, will indicate which production machinery the holder has operated and so will give the employer clear evidence that the holder is probably competent to operate or manage a specific machine or process. This would also depend on such considerations as how recently the relevant work experience was acquired.

Without reference to a widely known and trusted system for verifying skills and qualifications as envisaged by RPL-driven programmes, trust is likely to determine the willingness of employers and migrant workers to engage, and the propensity of employers to find ways of assessing the skills and employability of migrant workers.

The FP&M SETA has made progress in bringing RPL into effect. It established a Footwear Community of Expert Practitioners and invited them to participate in the RPL process. In the future, RPL will

most likely be applied to address generic requirements for entry to a programme. The QCTO is taking ownership of occupationally driven qualifications and will be responsible for devising accreditation processes and establishing assessment centres for the sectors and disciplines for which qualifications are becoming available.

Finally, migrant workers who have skills that South African job seekers lack might be more sought after. Should they receive formal recognition for these skills, it would further improve their chances of finding employment. Nevertheless, skills recognition for migrant workers should not be pursued to the exclusion of facilitating the occupational and job mobility of national workers.



# 6

## Chapter 6 Migrant workers in the leather industry of Kenya

### ► Introduction: the Kenyan economy

Kenya is a coastal country in East Africa that has played a significant role in global migration and trade. There are several routes used by migrants in the East African region to travel from one country to another. The most popular routes, in descending order, are: South Sudan-Sudan, Sudan-South Sudan, Somalia-Ethiopia, South Sudan-Ethiopia, Somalia-Kenya – with just under 0.5 million migrants taking the Somalia-Kenya route (IOM 2018).

The Kenyan economy is diversified and attracts labour from other regions (UNCTAD 2018b). There is a high volume of migrants entering Kenya, over and above the refugee and asylum-seeker populations. The Kenyan population was expected to rise to 50.8 million by 2022, according to the Republic of Kenya's *Medium Term Plan 2018-2022* (Republic of Kenya, 2018). The capital city, Nairobi, is the most favoured in-migration city for people seeking labour-related and educational institutions, while the next most-favoured area is the Rift Valley, owing to the availability of work and the vast space for agricultural development and settlement (IOM 2018). Except for Nairobi, Mombasa and Machakos, the remaining Kenyan counties are largely rural (Diener et al 2014).

Kenya is ranked the eighth-largest economy in Africa by gross domestic product (GDP), while the country serves as the financial, economic and transport hub of the East African region (ILO 2020a). In 2019, national unemployment levels fluctuated at around 2.6 per cent, with youth unemployment standing at 7.3 per cent, three times the national figure (Capazario et al 2020). Kenya is working to achieve a robust manufacturing sector, with economic growth propelled mainly by agriculture and services (SYSPRO & Strathmore University, 2019). In 2019, the country experienced growth in real GDP of about 5.5 per cent and employment growth of approximately 4 per cent. However, due to the impact of COVID-19, economic recovery to 2019 levels will be achieved until after 2023, while employment will recover to pre-pandemic levels more slowly.

### ► Profile of the leather industry in Kenya

The leather industry is growing steadily due to a growing population, increasing urbanisation and greater awareness of leather as a natural, eco-friendly and durable material for a multitude of uses (KAM 2020). Kenya's leather value chain constitutes livestock farmers and traders, butcheries, abattoir owners, traders and exporters of hides and skins, tanners and manufacturers of artisanal and leather footwear, as well as leather-goods manufacturers (Tchakounte & Mudungwe 2018).

The Kenyan Leather & Footwear manufacturing sector comprises three sub-sectors: tanneries, footwear and leather goods (KAM 2020). The sector relies on the country's livestock population for its supply of inputs. Kenya is said to have the third highest livestock population in Africa (Onyango et

al 2019), which provides the raw materials for leather and leather-goods manufacturing (KAM 2020). The production and trade of hides and skins is classified under the agriculture sector, while the production of leather from tanning is classified under manufacturing (Wiklund & Shepherd 2003). The Kenyan tanning industry is well-developed, with 14 operational tanneries countrywide (KAM 2020). Despite the large livestock base, this asset is not being efficiently transformed into a strong leather industry, owing largely to issues with leather quality and smuggling (KAM 2020).

The Kariokor Market in Nairobi is home to a vibrant and competitive informal sector responsible for producing low-cost leather footwear and other leather goods for the region and country (World Bank 2015). Micro, small and medium-sized enterprises (MSMEs) are heavily represented in footwear and leather-goods manufacturing. There are approximately 1,786 MSMEs operating in the leather value chain in Kenya (Krishnan et al 2019). Most producers of leather goods are micro and small enterprises, which prefer to remain in the informal sector to maintain competitiveness (World Bank 2015).

## Imports and exports

In 2015, Kenya's leather exports comprised 89 per cent semi-processed (*wet blue*) leather; 5 per cent raw H&S; 2 per cent finished leather; and 4 per cent leather products, including footwear, bags and travelware (World Bank 2015). In 2009, the Government imposed an 80 per cent export tariff on raw hides and skins in an attempt to reduce the export of raw H&S and increase local supply for the benefit of domestic value-adding (Onyango et al 2019). Of the 15.2 million pairs of leather shoes purchased in Kenya each year, only 3.3 million are locally produced (2.6 million low-priced and 0.7 million middle-priced pairs), the rest being imported (World Bank 2015). The shortfall in local supply is offset by rising imports of leather footwear, which increased by a factor of five between 2001 and 2017 (Tchakounte & Mudungwe 2018). Kenya imports much of its footwear and exports declined between 2015 and 2020, although there were attempts to reverse this trend with assistance from the government (KAM 2020). According to Mesa et al (2019), the Kenyan leather footwear industry is still young and developing, and comprises both the informal and formal sectors.

## The Mitumba market

The leather industry has experienced a decline in the production of manufactured leather goods because of global competition and pressures from the influx of cheap second-hand imports and non-leather substitute goods, primarily from more efficient producers in India and China (Hansen et al 2015), all of which render local producers less competitive. The quality and design differentiation of leather produced in Kenya is also limited.

According to the World Bank (2015), the *Mitumba* market handles around 57 per cent of the leather shoes purchased in the country. Low-cost, new leather footwear accounts for around 32 per cent and locally produced, low-cost leather shoes account for only 17 per cent. According to the Kenya Association of Manufacturers (KAM 2020) representing local producers, the import value of *Mitumba* items, consisting of "worn clothing and clothing accessories, blankets and travelling rugs, household linen and articles", increased from US\$ 102,637,000 in 2015 to US\$ 173,948,000 in 2019. However, from a consumer perspective, the *Mitumba* market provides Kenyans with an extensive range of both high- and low-quality leather and non-leather footwear at bargain prices.

## Government initiatives in support of the leather industry in Kenya

There are several factors which impede the growth of the Kenyan leather industry, as outlined by the World Bank (2015), including a lack of competitiveness, the high cost of leather and leather inputs sold locally, high labour costs and high electricity costs. Other challenges experienced by the leather industry include regulatory labour frameworks that do not attract foreign investment and migrant workers to the leather sector; the low skills level of local workers; and the gap between post-school training outcomes and industry skills requirements.

The Government response was to declare the leather industry a priority manufacturing sub-sector until 2022 under Kenya's *Big 4 Agenda* (Tchakounte & Mudungwe, 2018). The industry was highlighted by The Kenya Industrial Transformation Program (KITP) as a key driver of industrialization for the country (KAM 2020). The manufacturing industry target was to raise the leather and footwear sector's contribution to GDP from less than 9 per cent to 15 per cent by 2022 (Tchakounte & Mudungwe, 2018).

In its efforts to provide support to the local leather value chain and take advantage of this opportunity, the Government of Kenya has established a Kenya Leather Development Council (KLDC), which is essentially a support institution for both public and private entities within the leather sector, the aim being to transform the Kenyan leather value chain into a "vibrant value-adding and export-oriented one" (Tchakounte & Mudungwe 2018, 21). The Kenyan Government introduced plans to construct a special economic zone around the Athi River dedicated to the leather industry (Hall 2016). Tanning is also receiving attention from Government to enable both large and small producers to add value to their products. Studies show that there is major capacity underutilization in Kenya. Due to the poor supply of hides and skins, on average approximately 25 per cent of tanneries' capacity lies idle throughout the year (KAM 2020; Onyango et al 2019).

## The informal economy and informal SMEs' leather goods production

Efforts by local authorities supporting the development of the leather industry include the upgrading of the Kariokor informal manufacturing and market precinct (Tchakounte & Mudungwe 2018). The KLDC decided to launch the Kariokor Market Upgrade project in order to strengthen this market in the heart of Nairobi as a communal manufacturing growth platform for quality footwear and leather-goods production. Thousands of informal MSMEs specializing in the production of footwear of all kinds, as well as other items made from leather and other materials, are sold at more than 200 stalls in the market.

Nationally, the leather goods and articles sector is driven mainly by the vast informal sector, involving artisanal production in Kariokor, Kisumu, Thika and other creative hubs countrywide (KAM 2020). Informal footwear manufacturers and small and medium-sized enterprises (SMEs) are responsible for 55 to 60 per cent of local Kenyan footwear production.

Mesa et al (2019) investigated the quality of footwear produced by SMEs in Kenya, with the informal footwear industry in Kariokor market, Nairobi, forming the basis for the study. Twenty (20) SMEs were drawn at random, the participants being footwear artisans: footwear production unit owners, as well as the producers of footwear. The study, though limited, suggests that a very high proportion of the workforce has only limited or no leather-specific training, as indicated in the table below:



► **Table 16: Training in leather-related courses in Kenya**

Training in leather-related course	Frequency	Percentage
Degree in leather-related course	0	0
Diploma in leather-related course	1	5
Craft in leather-related course	2	10
No training in leather-related course	17	85
Total	20	100

Source: Mesa et al 2019

In 2015 the sector employed roughly 14,000 workers at different stages of the value chain (i.e. at tanneries and in the manufacture of leather goods and footwear) (KAM 2020). This excludes those employed in the harvesting of hides and skins in the agricultural sector (Capazario et al 2020). The leather industry labour market is characterized by high levels of informal employment and self-employment, the informal leather sector being the greater employer, accounting for 10,000 of the 14,000 workers employed (World Bank (2015).

## ► Migrant employment in the Kenyan leather industry

There is also evidence that Kenya is experiencing an influx of migrant workers from Bangladesh, China, India and Pakistan (Cook et al, 2016; MGSOG, 2017). Although the Kenyan Department of Immigration Services (DIS) records data on regular labour migrants who have been issued work permits, this data is not made publicly available, and therefore the number of migrant workers in Kenya remains unknown (ILO 2020a).

One of the greatest challenges in compiling the 2017 edition of the Report on Labour Migration Statistics in Africa was ascertaining the number of employed migrant workers (AUC 2020). It was found that around 62.9 per cent of migrant workers obtain employment in low-skilled occupations, in particular in agriculture, forestry and fishing, plant and machinery operation, clerical support work, and sales and service work. The situation is much the same with respect to migrants in Kenya (AUC 2020).

Businesses in the Kenyan leather industry appear to be dominated by Indians and Indian families, especially in the case of tanneries, where there is a requirement for well-developed technical skills. As a result, managerial positions tend to be awarded to migrant workers from India, who are given extended work permits, as compared to African migrants, who are mostly granted short-term work permits and contracts.

It was also noted that the leather sector is male-dominated. This was attributed to the fact that the leather sector is labour-intensive, which deters women's participation. Another reason cited was that women do not participate as much as men in the sector for cultural reasons, especially in the Somali community.

It was established that migrant leather workers operate at all skills levels. There are highly-skilled migrants who hold positions as managers and technicians, while medium- and low-skilled migrants are often found employed in craft and more basic occupations. Typically, migrant leather workers are either highly-skilled Indian migrants or medium- to low-skilled Africans. Highly skilled migrants



tend to work in footwear factories, while low-skilled workers are usually found in the informal leather sub-sector and in general goods manufacture.

Kenya is in the process of developing a leather industry policy in conjunction with the Ministry of Agriculture, the KLDC and the Kenya Institute of Public Policy Research and Analysis (KIPPRA). The policy does not address migrant workers in the leather sector explicitly, except as regards work permits for migrant workers and labour law regulations, to which migrant workers are required to adhere. Another point which surfaced frequently was that Kenyan universities are now offering training in leather studies. This recent development is seen as innovative in the East African context, where otherwise only Ethiopia offers leather-value-chain learning opportunities.





# 7

## Chapter 7 Policy implications

### ► Introduction

This research focused on the leather sector, selected because in many African countries the leather sector is an appropriate focus of efforts to expand industrial development. Indeed, African societies collectively own a substantial proportion of the global livestock that is the primary source of hides and skins in the tanning, leather goods and leather footwear industries. The competitive advantage arising from this readily available resource should be exploited by encouraging the growth of the African leather industry. Skills are of primary importance in the leather industry, which is labour intensive, therefore encouraging growth in the sector could increase labour absorption in the many African countries that already have to contend with high unemployment and the concerning prospect of its increasing as young people come onto the labour market.

Furthermore, the present historical period has seen substantial increases in internal and international migration, and higher numbers of refugees and asylum seekers in various parts of the globe. There is growing consensus that migration offers a potential demographic “dividend” and is not necessarily a drain on destination countries’ resources. As yet, the skills and experience of migrants are not adequately exploited at the point of destination. It is therefore vital to create appropriate and effective ways of identifying and recruiting migrant workers for employment in occupations commensurate with their skills and in which their skills can be most productively utilised. At the same time, these initiatives should also be coupled with efforts to ensure that regular channels are open for labour migration. As this is achieved, two key benefits will flow: firstly, migrants who are productively employed in decent jobs will contribute to the productivity of their industry, which in turn will contribute to overall productivity and boost economic growth in the destination country; secondly, migrant workers in sustainable and fairly remunerated jobs can repatriate funds (remit savings) to their countries of origin, thereby stimulating demand and economic growth there.

This being the case, the mobility of low-skilled leather workers is crucial if they are to find formal employment opportunities. This project is therefore focused on investigating, understanding and analysing the labour market conditions and other factors that act as barriers to or facilitators of migrant leather workers’ efforts to find productive employment in the formal leather sector.

## ► Findings and policy implications

The following findings reflect the general characteristics of leather-sector labour markets, and the production systems that largely determine these characteristics, which in turn impact on the mobility of migrant leather workers.

### Segmentation of the migrant leather labour market

Where the skills profile of migrant leather workers is concerned, the structure of the leather sector labour market is segmented, comprising both high-skilled and low-skilled migrants. In terms of working conditions and employment outcomes, this segmentation results in quite different patterns. Low-skilled workers tend to experience high barriers to accessing the formal economy, while high-skilled migrants experience low barriers to entry into formal employment. Leather workers with formal technical or management skills tend to be employed by formal-sector firms, with negotiated fixed-term contracts and visa and work permit arrangements made by the employing firm. This type of migrant worker in the leather sector might be recruited from an African, Asian or European country, usually depending on whether foreign investment is involved or whether the firm has purchased manufacturing equipment from a foreign supplier. In the latter case, skilled personnel usually remain to train local personnel or to supervise operations for a fixed period. Private-sector employers of skilled migrants in this category can facilitate entry to the country, though this is conditional on quotas limiting migrant numbers, time limits to migrant contracts, mentoring nationals to take over, and the absence of nationals with the required occupational skills. In Ethiopia, agreements covering some industrial sectors are reached on a case-by-case basis. These migrants with high, technical or mid-level technician skills generally experience low barriers to entry into formal employment and go through regular migration channels.

Other migrants encounter high barriers to entry, to both the country itself and to employment, as well as to social benefits and labour rights. These workers, of whom the majority are African, arrive and enter the destination country by both regular and irregular channels. They tend to have artisanal, medium-skilled status as a result of informal/non-formal training. They do not have formal contracts and are paid a daily, weekly or monthly wage.

A key differentiator between high- and low-skilled leather workers is that the latter are largely consigned to the informal sector, having by necessity entered the destination country with undocumented status. This is the key point at which the opportunities and conditions experienced by low-skilled and high-skilled workers diverge. There are limited channels for regular migration on the part of low-skilled workers, despite demand for their labour in destination countries.

**Policy implication:** A key factor, with powerful implications, is whether a worker migrates on a documented or undocumented track. It will be important to provide migrants, especially the low-skilled, with more equitable opportunities where documentation is concerned. Since being undocumented directs a migrant towards informal employment, the value of RPL for mobility, and indeed for any skills and qualification recognition process, is reduced.

## Employer demand for skills and leather worker mobility

An important question to consider is how African leather-sector employers meet their need for medium and high-level skills. In a study based on focus group discussions, the ALLPI states that “international labour migration [is] more experienced at skilled and professional manpower level” (ALLPI 2021, 52). How extensive this movement has become is difficult to estimate, though ALLPI focus-group participants observed that international labour migration is a factor in the leather sector in almost all countries, but not in high volumes (ALLPI 2021, 52). The indications of this research are that, in Africa, the main channel whereby high-skilled migrants enter a destination country is through the global recruitment practices of international leather corporations. A typical example would be an equipment manufacturer and supplier appointing existing staff to oversee the installation of machinery, supervise production and mentor an employee in the destination country to take over the role.

The recruitment of high-skill workers from abroad creates a need to have their qualifications recognised. The South African Qualifications Authority has established a unit to evaluate foreign qualifications (South African Qualifications Authority, 2021). The evaluation process involves comparing a foreign qualification with South African qualifications and, taking into consideration the competencies guaranteed by the foreign qualification, placing it within the South African National Qualifications Framework (NQF). Similarly, the Kenya National Qualifications Authority (KNQA) undertakes “equation of qualifications” awarded by foreign universities or other bodies that award qualifications (KNQA 2021).

**Policy implication:** Since the number of high-skilled workers in Africa’s formal leather sector is relatively small, the track record of most high-skilled individuals could probably be verified through trusted networks. However, as the leather labour market grows and companies employ more African leather experts, the need to validate the qualifications of intermediate-to-high-skilled workers is likely to increase.

## Structural characteristics of leather goods and footwear production in highly diverse national environments

Leather goods and footwear production straddles a diversity of production environments and skills configurations. Enterprises configure the tools, resources, machinery, technologies and materials at their disposal to optimize their footwear outputs. Access to electricity, basic leather-working tools, powered stitching machines and automated/digitized equipment is unevenly distributed within African countries. How these factors are incorporated into a production scenario will determine what skills are required and how these skills are deployed. These different production environments co-exist, so each country’s leather manufacturing sector will generate mixed demand for labour. Consequently, migrant workers entering a destination country with artisanal leather skills might well have the skills to set themselves up as own-account workers, but their ability to find work in mechanised production would depend on the level of technological development of the specific destination country. In countries where the leather industry is evolving and becoming more complex, migrants with skills that do not match the requirements of local production would need to upskill, deskill or relocate.

In considering the occupational context presented above, we should also take into account the levels of formal and informal economic activity in a country. This is because informal leather goods and shoe manufacture is a significant feature of the labour markets of many African countries. For instance, in Kenya the informal sector is estimated to employ two thirds of all leather sector workers,

as compared to the formal sector's one third. Most migrants finding employment in the informal sector possess limited skills and are probably undocumented.

**Policy implication:** This diversity of production environments could provide working opportunities for migrants, precisely because it is so varied. One challenge – a question of information and matching – would be to find ways of linking migrants with low-level skills with the appropriate production environment. In such a complex environment, where enterprise production lines and the related skills needs are diverse and unique, creating an RPL certificate for use in an informal setting would be difficult to achieve. There is a need to link opportunities for skills recognition and upskilling with formal employment.

## Many low-skilled migrant workers in the leather sector are engaged in informal employment

Many low-skilled migrant workers in the leather sector are engaged in informal employment. The legislation of the destination country may prescribe desired conditions in the workplace, such as fair negotiation of wages and a minimum wage floor or habitable working conditions. However, in the informal sector where most low-skilled migrants find job opportunities, the legislation is applied on only a limited basis. There is a lack of up-to-date statistical information to quantify the phenomenon, which presents a significant challenge when it comes to policy design.

**Policy implication:** This complex challenge requires reflection on the kind of policies and measures that could be implemented in the short, medium and long run to facilitate documented migration for low-skilled workers, and on how skills could assist in the transition to formality. A pilot study on the potential of RPL for migrants, possibly as part of the ACQF process and linked to labour migration governance arrangements, is recommended.

## Proportion of migrant workers who find employment through social networks

A marked proportion of migrant workers, albeit unquantified, find employment - usually with informal-sector employers - through existing family and kinship networks. While these links give access to the initial prize of employment, they do not guarantee fair wages or working conditions. Migrants who find work in this way are substituting networks for labour market information. This route may offer a modicum of security, but with the limited benefits associated with informality.

**Policy implication:** This challenge may be addressed by providing alternative ways of communicating information to migrant job seekers. Since the essential link between employer and job seeker is a social network connection, an RPL certificate is unlikely to have much currency. In these circumstances, making public employment services available to migrants and employers should be considered as a way of providing information and encouraging migrants and employers to engage and overcome possible reluctance. It might be useful to place employment services flexibly in locations, where migrant workers of particular trades tend to cluster.

## Initial low motivation of migrant workers to take up leather sector employment

Migrants find work in a range of economic sectors, but the largest concentrations accumulate in construction, domestic work, hospitality (waitering) and security (such as being car-guards). All of these are low-skilled occupations. Our fieldwork interviews with migrant workers employed in leather-related occupations revealed that very few in this group had, as job seekers, actually intended or expressed any desire to work in the sector. It emerged that a high proportion had become leather workers as a matter of necessity rather than of choice. This suggests that newly arrived low-skilled migrants would not necessarily be the best target for occupation-specific training. On the other hand, the research indicates that leather workers tend to retain their roles over substantial periods of time, which may be explained either by their having the security of a steady income or by a lack of motivation to pursue alternative employment.

**Policy implication:** This stability of tenure could be built on by offering targeted access to further skills development and RPL. The options for further skills development and RPL could be best anchored in particular occupational roles, such as shoe-repair worker or shoe-making artisan. This might involve learning or improving the occupation-specific skills of cutting and skiving, leather upper assembly and stitching, and lasting and finishing, in discrete modules. This possibility could be investigated further.

## Data availability on migration

Given the complexity of migration in its social and economic manifestations, there is a need to collect data to gain a better understanding of migrant worker characteristics and the nature of migration for access to employment, down to the sector and occupational levels.

**Policy implication:** The primary value of data is to support evidence-based migration policies. It is important to improve the validity and reliability of survey and administrative data, and conduct empirically grounded research on how migrant workers' mobility may be enhanced.

## ► Concluding comments

This chapter concludes our research into the potential role of skills recognition and, as part of that, the contribution RPL could make to facilitating the access of migrant workers to employment, specifically in leather-sector occupations. The research was conducted place during the COVID-19 pandemic, which placed some limitations on the fieldwork. More significantly, the paucity of data on the movement of migrants in the leather sector in Africa compelled the research team to carefully consider the most appropriate research design. We trust that the phased approach ultimately developed for this study will be of value for future continental studies, which that will undoubtedly face similar constraints. It is also the case that the COVID-19 pandemic is likely to have long-term impacts on migrant workers, and is likely to affect the current and future sustainability of migrant workers' employment and households.

The findings of the study strongly suggest that RPL can at best provide only a modest contribution to enabling access to employment opportunities in the leather industry in Africa. The leather sector, as with many other similar sectors, is strongly impacted by high levels of informality and segmentation. On the one hand, informal-sector employers remain relatively indifferent to the value of qualifications, especially at low skills levels, where scarcity is not a consideration. On the other, low-skilled workers tend to experience high barriers to entry, unlike highly skilled migrants. The extent to which RPL could address these inequalities is untested. Meanwhile, family connections and kinship networks remain the most reliable routes into employment.

The potential of an enabling policy environment emerging from triangulation between the Protocol on Free Movement of Persons (2018), the AfCFTA (2018), and the African ACQF (2018), currently in implementation, should not be underestimated. These policy instruments lay the foundation for a more seamless system of skills recognition for Africa. It will take time to reach sectors with high levels of informality such as the leather industry. It might be valuable to consider more coherent policy solutions, looking not only at training but also at employment, labour migration, trade and economic development policies. Closer alignment of the JLMP, which is currently managing a wide range of pilot projects in consultation with the AUC and member states, in particular with the ACQF process, is strongly recommended.



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## ► Appendices

### ► Appendix A: Overview of relevant legislation

#### Ghana

► Table 17: Ghanaian legislation

Theme	Acts, Policies and Legislation	Description
Citizenship	1992 Constitution of Ghana	"Grants citizenship by birth, marriage; amended in 1996 to grant dual citizenship" (Republic of Ghana 2016, 24).
	Citizenship Act, 2000 (Act 591)	The Act aims "to state in respect of citizenship by birth the legal conditions applicable at the given points in time; to bring the law in conformity with the Constitution as amended and to provide for related matters" (Ghana Immigration Service 2016, 34).
	Citizenship Regulations, 2001 (L.I 1690)	Along with the Citizenship Act (2000), this Act "grants citizenship by birth, naturalization and registration" (Republic of Ghana 2016, 24).
Immigration requirements	The Immigration Act, 2000 (Act 573).	An Act to re-enact with amendments the law relating to immigration; to provide for the admission, residence, employment, and removal of foreign nationals and to provide for related matters (Republic of Ghana 2000).
	Immigration Regulations, 2001 (L.I 1691)	The regulation makes provision for the granting of a residence permit, and for application for indefinite residence status, under which a foreign national is not required to hold a work permit to work (See Devillard et al 2015, 168).
	Immigration Amendment Act (848) of 2012	Along with the Immigration Act (2000) and Immigration Regulations (2001), this Act "provides admission/entry, employment and removal of foreigners; recognizes diaspora for citizenship" (Republic of Ghana 2016, 24).

Theme	Acts, Policies and Legislation	Description
Residence	L.I. 856 Aliens (registration) Regulations, 1974	The regulation states that “any alien of not less than sixteen years of age who intends to reside in Ghana shall, within fourteen days after he has been granted a permit under the Aliens Act, 1963 (Act 160) to remain in Ghana, apply to the District Immigration Officer in the district where he intends to reside to be registered” (Ghana Immigration Service 2016, 23).
Work permits	Ghana Free Zone Act, 1995 (Act 504)	Establishes free zones for development; grants residence permits to foreign workers who wish to work in designated free zones (Ghana Immigration Service 2016, 267).
Employment conditions	Labour Act, 2003 (Act No. 651)	The Act applies to all employers and workers and serves to “consolidate the laws relating to labour, employers, trade unions and industrial relations; to establish a National Labour Commission and to provide for matters related to these” (Republic of Ghana 2003).
	Labour Regulations, 2007 (L.I. 1833).	“Contains regulations concerning employment agencies, conditions of employment, organised labour, employment of persons with disability, health and employment, restriction on recruitment including prohibition of human trafficking” (ILO, 2014) and “grants permission for immigrant labour and other legally relevant industrial legal provisions” (Republic of Ghana 2016, 24).
Wage determination	Labour Act, 2003 (Act No. 651)	The Act applies to all employers and all workers and provides for Protection of Remuneration in Part IX of the Act (Republic of Ghana 2003).
Existence of a NQF Framework	Law LI 2195 under the Council for Technical and Vocational Education and Training (COTVET) Act, 2012.	Ghana currently implements an 8-level TVET qualifications framework (NTVETQF), while a comprehensive national framework is still in development (CEDEFOP et al 2017).
Existence of RPL regulations	No evidence found	National regulations on the Recognition of Prior Learning (RPL) have been developed by the Commission for Technical and Vocational Education and Training.
Existence of RPL practice	No evidence found	Applications and guidelines for RPL are available through the Council for TVET (CTVET).



## Côte d'Ivoire

► Table 18: Côte d'Ivoire legislation

Theme	Acts, Policies and Legislation	Description
Citizenship	Law No. 61-415 Of 14 December 1961 on The Code of Ivorian Nationality (Nationality Code) as amended by Act No. 1972-852 of 21 December 1972.	The law details who may hold Ivorian nationality and how nationality is gained and lost, including through birth, marriage, and naturalisation (Adjami 2016, 14-19).
Immigration requirements	Law No. 90-437 of 13 May 1990 regarding Entry and Stay of Foreigners in Côte d'Ivoire	"Art. 4 distinguishes between nationals from countries subject to visa obligations and those who are simply requested to hold a valid passport" (Devillard et al 2016, 137).
	Regulations and circulars of 1993 and 1995 regarding conditions of entry of foreigners for a stay of less than 90 days in Côte d'Ivoire.	"A distinction is made between countries for which the visa is directly delivered by the competent consular post and those for which consular posts are requested to consult the Ministry of Interior" (Devillard et al 2016, 137).
	Identification of persons and the stay of foreigners in Côte d'Ivoire; Law No. 2004-303 of 2004, amending Law No. 2002-03 2002.	Details the requirements for the entry and stay of foreigners in Côte d'Ivoire and subsequent regulations and confirms the use of national identity cards for Ivorians and residency cards for foreign nationals, including ECOWAS citizens (Adjami 2016).  "Art. 8: In absence of a passport, a Permit of Free Circulation can be delivered to ECOWAS Member States nationals. In practice, however, this mechanism has never been implemented" (Devillard et al 2016, 137).
	National Population Policy (Politique Nationale de Population, PNP) 2015-2025.	The PNP 2015–2025 takes into account migration policy (Republique de Côte d'Ivoire 2015).
Work permits	Identification of persons and the stay of foreigners in Côte d'Ivoire; Law No. 2004-303 of 2004, amending Law No. 2002-03 2002.	"Art. 11 sets the principle that a stay permit is required for the exercise of a salaried activity, as well as a visa of the work contract granted by the "authority in charge of controlling the stay of foreigners" (in other words, the Ministry of Interior) (Devillard et al 2016, 140).
	Regulation No. 64-21 of 15 June 2004 modifying Regulation No. 1437 of 19 February 2004 relating to the Regulation of Recruitment and Visa Fees for Work Contracts of No. Nationals	"Art. 2 requires the employer to make a preliminary declaration to the public employment services (AGEPE) and to publish the job offer in question in a national newspaper for a duration of one month before starting the recruitment process. Art. 3: The work contract – or letter of employment – must be approved by the AGEPE. Art. 4: The decision must be taken within eight days and is based about the labour market. Art. 3: Within the first three months of his/her employment, the worker must request a work card" (Devillard et al 2016, 141).



Theme	Acts, Policies and Legislation	Description
Employment conditions	Law no. 2015-532 of July 20, 2015, on the Labor Code Repealing Law No. 95-15 of January 12, 1995, on the Labor Code.	Relates to the general provisions of employment, working conditions, salary, workplace health and safety, unions, collective labour agreements, labor disputes, and control of work and employment (République de Côte d'Ivoire, 2019) and "provides for equal treatment with nationals. As a principle, foreigners, regardless of their legal status, benefit from all obligations and rights from the labour legislation", including the right to join a trade union (Devillard et al 2016, 142).
	Decree No. 96-287 of April 3, 1996, relating to the Labor Law Employment Contract.	Specifies the particulars that must be included in the employment contract. For foreign workers, the employment contract must be subject to the visa of the minister responsible for employment (Republique de Côte d'Ivoire 1996).
Wage determination	Minimum inter-professional wage (SMIG) Decree no. 2013-791 of 20 November 2013 revaluing the guaranteed minimum inter-professional wage.	Guarantees a minimum wage. According to the Labor Code (2017), "there are two minimum wages in Côte d'Ivoire: the SMIG (minimum guaranteed inter-professional wage) and the SMAG (agriculture)" (République du Côte d'Ivoire 2017).
Existence of a NQF Framework	No evidence found	There is currently no formal national certification framework (Merawa 2020).
Existence of RPL regulations	No evidence found	According to the ILO State of Skills: Côte d'Ivoire (2020, 34) "there is no generalized system of recognition of prior learning (RPL), although the social partners are in favour of its introduction."
Existence of RPL practice	No evidence found	No mechanism for RPL (validation des acquis de l'expérience) currently exists beyond the conceptual phase (Merawa 2020, 36).

## Ethiopia

► Table 19: Ethiopian legislation

Theme	Acts, Policies & Legislation	Description
Citizenship	Constitution of the Federal Democratic Republic of Ethiopia	Guarantees freedom of movement, including for foreign nationals lawfully occupying the country, and provides for rights to Ethiopian nationality (Ashine 2017:29).
	Proclamation No. 378/2003 on Ethiopian Nationality.	"It establishes a descent-based regime for attribution of citizenship at birth, removing gender discrimination in relation to transmission of citizenship to children and spouses" and allows for "naturalisation... based on four years' residence and fulfilment of other conditions" (Citizenship Rights in Africa Initiative 2003).
Immigration requirements	Council Of Ministers Regulations No. 114/2004 On Immigration.	Makes provision for acquiring travel documents, residence permits, and the registration of foreign nationals (Federal Democratic Republic of Ethiopia 2004).
	Immigration Proclamation No. 354/2003.	This Proclamation details the requirements for travel documents for the entry and exit of foreign nationals (Federal Democratic Republic of Ethiopia 2003a).
	Authentication and Registration of Documents Proclamation No. 334/2003.	This Proclamation details the requirements for the authentication and registration of documents (Federal Democratic Republic of Ethiopia 2003b).
Employment conditions	Labour Proclamation No. 1156/2019	While the Proclamation addresses several gaps in earlier legislation including employee benefits, overtime, minimum wage, liability, workplace sexual harassment, termination of contracts and redundancy, "a large majority of the provisions of the Proclamation 377/2003 were directly transplanted to the new law verbatim" (Africa Legal Network 2019).
	Employment Exchange Services Proclamation no 632/2009	"This proclamation, which repealed the Private Employment Agency Proclamation No. 104/1998, contains the major legal regimes of Ethiopia that protects migrant works" (sic) (Ashine 2017, 30).

Theme	Acts, Policies & Legislation	Description
Work permits	Providing Foreign Nationals of Ethiopian Origin with certain Rights to be Exercised in their Country of Origin, Proclamation No. 270/2002.	Entitles foreign nationals of Ethiopian origin to various rights and privileges, including the right to residency and a work permit (Federal Democratic Republic of Ethiopia 2002).
	Labour Proclamation No. 377/2003 (repealed).	"In order to access the labour market, foreign nationals must be granted a work permit by the Ministry of Labour and Social Affairs. Employers wishing to hire a foreign national must prove that no Ethiopian is qualified for the position, pursuant to Section 174 of the Labour Proclamation No. 377/2003" (IOM 2019, 13).
Wage determination	No evidence found	"In Ethiopia, there is no legally set minimum wage except for public servants (the minimum wage for public servants is ETB 1500 Birr (USD 46) per month)" (ILO n.d).
Existence of a NQF Framework	No evidence found	"The ENQF was formally proclaimed in 2010 but it is not clear if legislation has been enacted beyond the proclamation" (Keevy 2020, 7).
Existence of RPL regulations	No evidence found	The National TVET Qualifications Framework (NTQF), a sub-framework of the ENQF, provides for recognition of prior learning, including foreign and historical qualifications (Keevy 2020).
Existence of RPL practice	No evidence found	N/A

## South Africa

► Table 20: South African legislation

Theme	Acts, Policies and Legislation	Description
Immigration requirements	Immigration Act 13 of 2002.	To provide for the regulation of admission of persons to, their residence in, and their departure from the Republic; and for matters connected therewith (Republic of South Africa, 2002).
Work permits	The Employment Services Act 4 of 2014.	"The purpose of ESA is to establish productivity within South Africa, decrease levels of unemployment, and provide for the training of unskilled workers" (Salt, cited in Polity 2015).
Employment conditions	The Labour Relations Act 66 of 1995	The Act regulates and governs labour relations (Republic of South Africa 1995).
	Basic Conditions of Employment Act 75 of 1997	Establishes and makes provision for the regulation of basic conditions of employment (Republic of South Africa 1997).
Wage determination	National Minimum Wage Act 9 of 2018	The Act establishes the national minimum wage (Republic of South Africa 2018).
Existence of a NQF Framework	National Qualification Framework The NQF Act 67 of 2008 with Amendments to the NQF Act of 2008 signed into law in August 2019	NQF consists of three NQF sub-frameworks, (the general and further education and training qualifications sub-framework (GFETQSF), the higher education qualifications sub-framework (HEQSF), and the occupational qualifications sub-framework (OQSF), which allow vertical, horizontal/ lateral and diagonal movement of learners through the formal education and training system (Republic of South Africa 2008).
Existence of RPL regulations	National policy for the Implementation of Recognition of Prior Learning (2013, amended 2019).	"The key intention of the amended Policy and Criteria is to facilitate change in the lives of RPL candidates, including workers and learners of all ages (both employed and unemployed), and other marginalised groups" (SAQA 2019).
Existence of RPL practice	Recognition of Prior Learning	Provides information on the responsibilities of the various categories of NQF partners and stakeholders regarding the implementation of RPL.

## Kenya

► Table 21: Kenyan legislation

Theme	Acts, Policies and Legislation	Description
Immigration Requirements	The Immigration Act No.25 of 1967.	Certain non-citizens of Kenya are required to apply for entry permits and dependents' passes (Republic of Kenya 1967).
	Kenya Citizenship and Immigration Act (Act No. 12 of 2011) (Cap. 172).	Provides for those "matters relating to citizenship; issuance of travel documents; immigration and for connected purposes" (Republic of Kenya, 2011a).
	Kenya Citizens and Foreign Nationals Management Service Act (No. 31 of 2011).	Establishes "the Kenya Citizens and Foreign Nationals Management Service; to provide for the creation and maintenance of a national population register and the administration of the laws relating to births and deaths, identification and registration of citizens, immigration and refugees; administration of the laws relating to marriages and for connected purposes" (Republic of Kenya, 2011b).
	Labour Institutions Act, 2007	Under the Act, the Minister responsible for labour will, in consultation with the Board, advise the Government on the issuance of work permits to non-citizens (Republic of Kenya 2007).
Work permits (access to legal employment)	Section 40 of the Kenya Citizenship and Immigration Act, 2011	N/A
Employment conditions	Employment Act, 2007, Chapter 226.	"Declare[s] and define[s] the fundamental rights of employees, to provide basic conditions of employment of employees, to regulate employment of children, and to provide for matters connected with the foregoing" (Republic of Kenya 2007).
	Employment (Amendment) Act, 2021	Amends the 2007 Act to provide for pre-adoption leave (Republic of Kenya 2021).
Wage determination	Regulation of Wages (General) (Amendment) Order, 2018.	Establishes basic minimum monthly wages.
Existence of a NQF Framework	Kenya National Qualifications Framework Act No. 22 of 2014	Act establishing the KNQF and "to provide for the development of a Kenya Qualifications Framework and for connected purposes" (Republic of Kenya 2014).

Theme	Acts, Policies and Legislation	Description
	Kenya National Qualifications Framework Regulations (2018)	The activities of the Kenya National Qualifications Authority (KNQA) are guided by the KNQF Regulations of 2018 (Kenya National Qualifications Authority 2018).
Existence of RPL regulations	Recognition of Prior Learning (RPL) Policy Framework in Kenya (2020)	“The policy aims to recognize all persons who have acquired competency through informal and non-formal settings... regardless of one’s educational background, age, status in society, disability, race, religion or nationality” (Kenya National Qualifications Authority 2020).
Existence of RPL practice	Recognition of Prior Learning (RPL) Policy Framework in Kenya (2020)	N/A



