The Canadian Labour Market:
Exploring Employment Opportunities for Tunisians

By Tomas Ernst
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April 2013
ABOUT THE AUTHOR

Tomas Ernst is a Canadian national who has worked for the federal government in Ottawa and the United Nations in Nairobi. From 2007-2011 he worked with the World Bank in the Oceania region on temporary labour mobility programs, reducing remittance transaction costs and providing financial education programmes. In early 2012, Tomas moved to Marseille to be closer to the Maghreb region where he has provided technical assistance to the Tunisian government on regulating the recruitment industry and identifying new opportunities for Tunisian labour in foreign markets. Tomas is particularly interested in how to leverage migration for development purposes.
The MDG Achievement Fund (MDG-F)  
Youth, Employment and Migration

The MDG Achievement Fund (MDG-F) is committed to eradicating poverty and inequality and changing people’s lives around the world. Set up in 2007 with a generous contribution from the Government of Spain to the United Nations System, works together with and in support of citizens and their organizations as well as governments to implement programmes that help advance the Millennium Development Goals (MDGs) worldwide. The MDG-F is managed jointly by UN teams in each country. The collaboration between different UN agencies is meant to strengthen the system’s ability to deliver developmental results efficiently. The MDG-Fund has financed 130 programmes in 50 countries around the world, piloting examples and supporting national programmes that can be scaled up into national policy frameworks.

The joint programme, Engaging Tunisian Youth to Achieve the MDGs, began in Tunisia in October 2009. The program aims globally to achieve MDG 1, reducing extreme poverty and hunger, targeting full productive employment and decent work for everyone, including women and youth. Three regions were targeted: the governorates of el Kef, Gafsa and Greater Tunis. The objective was to support the effort to develop regional capacities in migration-prone areas through the sustainable creation of decent jobs and the promotion of local competencies. Five United Nations agencies (FAO, ILO, IOM, UNDP, UNIDO) and the Ministry of Vocational Training and Employment coordinated to support the objectives of the government, the private sector and civil society to work on youth employment and migration in the regions.

The programme proposes interventions adapted to the varying needs of the target populations. The expected results are as follows:
1. For 2013, public and private partners put into place new employment strategies and job-creation schemes adapted to the specific needs of unemployed low skilled youth and unemployed university graduates in Tunis, Le Kef and Gafsa.
2. The unemployed low skilled youth and unemployed university graduates in the three regions will have better access to decent employment in Tunisia and abroad.
3. Starting in 2013, a proportion of unemployed low skilled youth and unemployed university graduates created their own projects.

The joint programme was conceptualized to respond to the swelling problem of unemployed youth and migration particularly in urban and rural areas of Tunisia with the objective to support efforts to help them find productive employment and minimize the risk that they will attempt to migrate illegally. The priority of this joint programme is to support the poorest youth whose employment opportunities are the weakest with particular attention to young women who face discrimination based on sex.

This study is an activity undertaken by IOM upon request of the Tunisian authorities and closely coordinated with the Embassy of Canada in Tunisia. It is a pilot study that could be conducted, with other potential countries of destination, thus exploring employment opportunities for Tunisians abroad and providing the Tunisian Government with short-, mid- and long-term actions to undertake.

The present study was conducted in February and March 2013, and finalized in April 2013, with the support of public and private stakeholders in Canada. It is however important to note, that on the 29th of April 2013, the Canadian Government announced reforms to the Temporary Foreign Worker Programme (TFW). Considering the timeframe of this study and the evolving nature of the TFW programme in Canada, ongoing changes to the programme are a reality.
Acknowledgments

The author wishes to sincerely thank the IOM Tunis office represented by Ms. Lorena Lando for the strong support and feedback, particularly Ms. Shiraz Jerbi and Mr. Francesco Carella. Thanks must also be extended to the IOM Regional Office in Cairo and in particular Mr. Michael Newson. In Canada, the author received especially strong support from Ms. Richelle Bourgoin and Ms. Gisele McCarthy of the Saskatchewan Government; Tienne Chenier from Immigration Canada; Louis Allain from the Economic Development Council for Manitoba Bilingual Municipalities; Ambassador Mr. Riadh Essid, from the Tunisian embassy in Ottawa. Finally, the author would like to thank Bill Butlin (Jacobs Canada) and Shabbir Hakim of ACTIMS for sharing insights from their vast experience on the labour market needs of Alberta's petroleum industry.
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<th>Full Form</th>
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<tbody>
<tr>
<td>ACTIMS</td>
<td>Alberta Council of Turnaround Industry Maintenance Stakeholders</td>
</tr>
<tr>
<td>ACF</td>
<td>Assemblée communautaire frankosaskoise</td>
</tr>
<tr>
<td>ACFA</td>
<td>Association Canadienne-Française de l'Alberta</td>
</tr>
<tr>
<td>AHLA</td>
<td>Alberta Hotel and Lodging Association</td>
</tr>
<tr>
<td>AINP</td>
<td>Alberta Immigrant Nominee Program</td>
</tr>
<tr>
<td>AIT</td>
<td>Alberta Apprenticeship and Industry Training agency</td>
</tr>
<tr>
<td>ANETI</td>
<td>National Agency for Employment and Independent Work</td>
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<td>ATCT</td>
<td>Tunisian Agency for Technical Cooperation</td>
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<td>CEC</td>
<td>Canadian Experience Class</td>
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<td>CIC</td>
<td>Citizenship and Immigration Canada</td>
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<td>CISAA</td>
<td>Construction Industrial Stakeholders Association of Alberta</td>
</tr>
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<td>CME</td>
<td>Canadian Manufacturer's and Exporters</td>
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<td>Destination Canada</td>
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<tr>
<td>FMCs</td>
<td>Francophone Minority Communities</td>
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<td>FN</td>
<td>First Nations</td>
</tr>
<tr>
<td>FTE</td>
<td>Full-Time Equivalent</td>
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<tr>
<td>GDP</td>
<td>Gross Domestic Product</td>
</tr>
<tr>
<td>GoC</td>
<td>Government of Canada</td>
</tr>
<tr>
<td>GoT</td>
<td>Government of Tunisia</td>
</tr>
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<td>G7</td>
<td>Group of Seven (countries)</td>
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<tr>
<td>HR</td>
<td>Human Resources</td>
</tr>
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<td>Human Resources and Skills Development Canada</td>
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<td>ICT</td>
<td>Information Communication Technologies</td>
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<td>International Organization for Migration</td>
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<td>Immigration and Refugee Protection Act</td>
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<td>Just-In-Time</td>
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<td>Labour Market Opinion</td>
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<tr>
<td>MENA</td>
<td>Middle East and North Africa</td>
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<td>Manitoba Immigrant Nominee Program</td>
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<td>Memorandum of Understanding</td>
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<td>NOC</td>
<td>National Occupation Classification system</td>
</tr>
<tr>
<td>OTE</td>
<td>Office for Tunisians Abroad</td>
</tr>
<tr>
<td>PR</td>
<td>Permanent Resident</td>
</tr>
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<td>PNP</td>
<td>Provincial Nominee Program</td>
</tr>
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<td>RDEE</td>
<td>Réseau de développement économique d'employabilité de la francophonie</td>
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<tr>
<td>SATCC</td>
<td>Saskatchewan Apprenticeship and Trade Certification Commission</td>
</tr>
<tr>
<td>SCA</td>
<td>Saskatchewan Construction Association</td>
</tr>
<tr>
<td>SIAT</td>
<td>Saskatchewan Institute of Applied Science and Technology</td>
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<td>SINP</td>
<td>Saskatchewan Immigrant Nominee Program</td>
</tr>
<tr>
<td>SME</td>
<td>Small to Medium-sized Enterprise</td>
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<tr>
<td>TFW</td>
<td>Temporary Foreign Worker</td>
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Executive Summary

The government of Tunisia (GoT) hosted a National Congress on Employment in Tunis in June 2012. In addition to addressing domestic employment challenges, the Congress included a number of workshops dedicated to labour migration including exploring international employment opportunities for Tunisians. The International Organization for Migration (IOM), a key stakeholder at the Congress, highlighted Canada's proactive approach to immigration policy and the Canadian labour market's growing demand for foreign workers.

Following the Congress, the Tunisian government approached the IOM to deepen its knowledge of labour migration opportunities in Canada. Until recently, Tunisia traditionally focused on identifying international placement opportunities in geographically proximate locations or in those countries where the main working language is French. However, employment in more distant countries such as Canada and Australia, where the working language is predominantly English, are becoming viable alternatives. Despite the geographic distance, Tunisia and Canada have shared over fifty years of positive bilateral relations. The Tunisian diaspora in Canada is numbered around 20,000 and the two countries share a common language in French.

IOM agreed to conduct a two-month research study in January 2013 to closely examine the provinces of Alberta, Manitoba, and Saskatchewan to identify new opportunities and importantly, to assess where Tunisian labour has a comparative advantage in order to define and recommend the next steps for Tunisia to fully exploit these opportunities. A total of thirty-eight interviews with governments, employers, industry associations and Francophone Minority Communities (FMCs) across western Canada were conducted. The IOM proposes to use the study to working partnership with the GoT to develop an effective engagement strategy to follow-up on the strategic opportunities identified in Canada.

The Canadian economy is one of the strongest performers of the G7, and economic forecasts indicate a GDP growth rate of 2.5 per cent in 2014 (Wright, 2013). Employment levels are predicted to increase by 200,000 to 250,000 in 2013 and 2014, with the unemployment rate falling below seven per cent at the end of 2013. The Canadian labour force needs immigrants: low fertility rates and a large percentage of retiring older workers are eroding the supply of labour. Immigration is seen as the solution to these demographic constraints and analysis suggests future immigration intake levels must continue increasing on an annual basis through at least 2016. Given the demographic challenges observed across Canada, it is important to remember that for many Canadian stakeholders, the immigration preference is towards permanent residency.

Canada is a bilingual country, with the majority of francophones living in Quebec. However, there are 1.3 million francophones living in small communities outside Quebec (see Annex I) who struggle to attract and retain francophone immigrants. The government of Canada created Destination Canada (DC) to support the attraction and retention of francophone immigrants destined to communities outside Quebec (Francophone Minority Communities - FMCs). Tunisia is a participating country in this program and since 2009, a number of Canadian companies have travelled to Tunisia to prospect and recruit workers. DC offers special "fast-tracked" immigration processing and provides FMCs with substantial federal funding to support newcomers.

Alberta's working population is approximately 2.1 million. Since 2001, Alberta has grown on average by 46,350 new jobs per year, a growth rate of 2.5 per cent per annum. Alberta's unemployment rate is the second lowest in Canada, falling to 4.3 per cent in 2012. The Province's workforce is projected to be 77,000 workers short between 2009 and 2019, with overall demand for workers substantially outpacing supply by 2015. The projected increase will come from domestic sources of labour and new immigrants. The Albertan government takes a "hands off" approach to immigration; yet the Province attracts the greatest number of TFWs in Canada (60,000), many of which are drawn by the robust oil and gas industry.
The Manitoban workforce includes a total employed population of 633,000. The unemployment rate was 5.2 per cent in December 2012, which is the third lowest in Canada. Manitoba's economy is diverse with GDP derived from industries including manufacturing, aerospace, trade, agriculture and transportation. The Province forecasts a total population of 1.5 million by 2022, which is an increase of almost 300,000 people in the next 10 years. The projected increase will come from domestic sources of labour and new immigrants. Manitoba has a dedicated Immigration department that prioritizes the attraction and settlement of foreign workers. The Province connects eligible TFWs to permanent immigration routes to address its demographic challenges.

The Saskatchewan workforce includes over 545,300 employed with 25,000 new jobs added to the economy since January 2012. The unemployment rate fell to 4.1 per cent in January 2013. Saskatchewan has a substantial and diverse resource base: potash, uranium, oil, gas, diamonds, forests and agriculture. The labour-force will require an additional 120,000 workers by 2020, or an average of 10,000 new workers per year. This increase will come from domestic sources of labour and new immigrants. The Province has dedicated a department to Immigration. It prioritizes the attraction and settlement of newcomers to address their demographic constraints. Saskatchewan also facilitates overseas recruitment missions for its SMEs and has visited Tunisia twice in the last six months (November 2012 and March 2013).

The study identified a number of near, medium and long-term opportunities for the GoT and its representatives in Canada to explore:

In Alberta, the GoT should follow-up on the invite from the Alberta Hotel and Lodging Association (AHLA) to familiarize its Board and its numerous industry members with the Tunisian labour market. The AHLA recently signed a recruitment agreement with the Jamaican Ministry of Labour. Despite the geographic distance, the strength of Tunisia's domestic tourism industry and the role that could be played by ATCT and ANETI and support from francophone associations in Alberta are viewed positively by the AHLA.

Medium to longer-term opportunities for Tunisian labour in Alberta's oil and gas industry are possible. Meetings with two influential industry associations dedicated to supporting the labour requirements of the oil and gas industry and its many employer stakeholders revealed interest in learning more about Tunisian competencies. However, given the volume of opportunities available and the constraints to recruiting in Tunisia as outlined by Jacobs Engineering, the IOM in partnership with the GoT, should strategize about how best to develop in-roads to the Albertan oil and gas industry.

In Manitoba, the GoT should connect with representatives of the Manitoba Trucking Association and Manitoba Heavy Construction Association, who have invited Tunisia to make presentations to their Boards of Directors with a view to familiarizing and highlighting the strengths of Tunisian labour. However, this will first require the development of a "Brand Tunisia" labour strategy for the Canadian market. The feedback collected in this study will help inform this strategy. On a medium to long-term basis, the GoT should initiate discussions with Provincial government officials who signaled an interest in beginning discussions towards a recruitment type agreement with Tunisia. Tunisia's participation in the DC program and the strong support offered by the local francophone community are very encouraging incentives for the Province.

In Saskatchewan, the GoT should contact the Provincial representatives who facilitated the March 2013 recruitment mission to Tunisia, and hold follow-up meetings with the Saskatchewan SMEs who were invited. ANETI and ATCT have key roles to play here too; working with proactive FMCs to harmonize English language training pre-departure and leveraging market intelligence gained from SMEs to implement Brand Tunisia. On a medium to longer-term basis, given the close working dynamic between Saskatchewan industry and Provincial government agencies, discussions should be initiated on how best to establish a JIT (Just-In-Time) supply of labour between Tunisia and Saskatchewan. One company, Brandt Industries, has already set-up overseas training partnerships and signaled its interest in working on a feasibility study for Tunisia.
Introduction
Introduction

1. Purpose/Objectives of the Study
The government of Tunisia (GoT) hosted a National Congress on Employment in Tunis in June 2012. In addition to addressing domestic employment challenges, the Congress included a number of workshops dedicated to labour migration including exploring international employment opportunities for Tunisians. The International Organization for Migration (IOM), a key stakeholder at the Congress, highlighted Canada's proactive approach to immigration policy and the Canadian labour market's growing demand for foreign workers.

Following the Congress, the Tunisian Ministry of Foreign Affairs approached the IOM to deepen the government's knowledge of labour migration opportunities in Canada. Until recently, Tunisia had traditionally focused on identifying international placement opportunities in geographically proximate locations or in those countries where the main working language is French. However, employment in more distant countries such as Canada and Australia, where the working language is predominantly English, are becoming viable alternatives.

The GoT views international recruitment to labour markets such as Canada as complementary to its current domestic employment generation programs. However, Tunisian authorities have limited information on the Canadian labour market and particularly those industries and employers with occupations in demand; including limited awareness of Canadian industry and those companies that could serve as a starting point to create new opportunities for Tunisian job seekers.  

The IOM agreed to conduct a two-month research study to examine the provinces of Alberta, Manitoba and Saskatchewan to identify new opportunities and importantly, to assess where Tunisian labour has a comparative advantage in order to define and recommend the next steps for Tunisia to fully exploit these opportunities. A total of thirty-eight interviews with government, employers, industry associations and FMC representatives across western Canada were conducted (see Map in Annex I). The final study includes a list of key industry and government contacts who were interviewed based on the study's research methodology (Annex II).

The IOM proposes to use the study to work in partnership with the GoT to develop an effective engagement strategy to follow-up on the strategic opportunities identified in Canada. IOM has a strong history of experience facilitating the recruitment and employment of over 10,000 temporary migrant workers around the globe, and has served as a key partner to the private sector when it has sought foreign workers to address labour shortages.

2. The Link between Migration and Development
There is growing awareness of how migration can improve the welfare of migrants who depart and their dependents (through the receipt of remittances) as well as to the economies of labour sending and receiving countries. At the UN General Assembly Dialogue on International Migration and Development in 2006 and the Global Forum on Migration and Development in 2007 the majority of participants agreed migration holds considerable potential for economic and social development (IOM, 2008).

IOM views migration and development as interdependent and seeks to contribute to a better understanding of theses links to harness the development potential of migration for the benefit of both communities and migrants and to contribute to sustainable development and poverty reduction (IOM, 2012). While migration was not

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1The GoT's labour market knowledge of Canada has increased since its selection into the DC program in 2009.
2Limitations of the research study included i) limited budget and timeframe (only a short amount of time could be allocated to each province) and ii) first-time prospecting (which meant many Canadian industry groups and employers did not respond to a series of requests for meetings or were unwilling to take time out to discuss labour market and HR issues).
factored into the eight Millennium Development goals, IOM is working to ensure migration is better integrated into the post-2015 global development framework (IOM, 2013).

GATS Mode IV is a reference to trade negotiations on services that sought to include the international movement of people; however, despite extensive debate on this subject very little progress has been made, with most countries preferring bilateral labour agreements. Kharas (2006) states that by some estimates the gains to global welfare from the liberalization of the movement of people could outweigh the gains from any remaining trade liberalization. Barriers to the movement of people will continue to be a considerable economic impediment to further global economic gain (IOM, 2008).

Despite the absence of an international body or formal international agreement governing the movement of people, the number of migrants around the globe exceeds 200 million (IOM, 2008). The international migration patterns of immigrants have changed, as well as the duration, including short-term relocation, longer-term assignments and permanent migration (IOM, 2008). According to World Bank data, Tunisia had a population of 10.5 million and a stock of 650,000 emigrants (6.2% of the population) living predominantly in France, Italy, Germany, Libya, Algeria, Canada and the U.S.A (World Bank, 2011).

Pritchett (2008, IOM) identifies a number of driving forces that cause people to migrate. These include the disparities in income and employment within countries and between regions. The global demographic imbalance is another driving force, with low-income countries surging in population while OECD countries see limited population growth or in some cases, a decline in population. The liberalization of the flow of goods, capital and services and the current and continued demand for semi and low skilled services in OECD and middle-income countries has also increased the pressure for labour mobility.

3. Tunisia: the Political and Economic context

Tunisia was the first-country to awake the Arab Spring, experiencing an unprecedented wave of massive civil unrest that ended the 23-year rule of President Zine El Abidine Ben Ali on January 14, 2011 and ushered in a new political era. Following the revolution and removal of President Ben Ali, an Interim government was elected in October 2011 with the key task of organizing the national election of a constituent assembly and writing a new constitution. The political challenge facing the authorities is promoting a shared economic recovery and responding to the demands of Tunisians for greater citizen voice and state accountability (Murray, 2012).

Tunisia is a middle-income country with average annual Gross Domestic Product (GDP) growth from 1997 to 2007 of five percent; which placed it in the fastest growing countries in the Middle East and North Africa (MENA) region. The economy draws its strength from tourism, manufacturing (including hosting many offshore operations in automotive, textile and electronics industry), agriculture, ICTs and a relatively minor resource extraction industry (Obayashi, 2012). The Tunisian standard of living compared favourably to its neighbours, with average incomes in 2011 at $4,160 USD. However, Tunisia is still undergoing a slow recovery following the revolution, challenges related to the spillover from the Libyan conflict and a sharp downturn in foreign direct investment and tourism (Murray, 2012).

The domestic private sector has long struggled with a lack of transparent regulations, which favoured certain industries and resulted in entire segments of the domestic market cut-off to competition. In addition, the former Ben Ali government provided financial incentives to encourage the creation of a large offshore industry. The demand for labour in the domestic economy shifted towards the unskilled, while Universities and training colleges continued to produce a highly educated workforce. The economy contracted by nearly two percent and unemployment increased from 13 per cent to almost 20 per cent in 2011, with the unemployment rate for the young and educated (15-29) almost twice as high. This created an environment of nepotism, favouring those with connections over those without. From a regional perspective, the coastal cities were much better off and generated a bulk of the country's wealth, while inner
regions and rural communities remained impoverished (Murray, 2012). Unemployment in some regions is higher than 40 per cent, including El Kef and Gafsa regions.

Tunisia's Minister of Vocational Training and Employment outlined the challenge (June 2012) of finding employment for 700,000 unemployed Tunisians, including almost 200,000 of which are graduates in higher education. Despite higher levels of educational attainment (Table I), Tunisian workers have found it difficult to access the growing demand for labour from their own private sector. A survey of HR managers across MENA (IFC, 2011) revealed only one-third of new graduates are ready for the workplace. More than half of all the HR managers stated their firms are forced to address these gaps by providing training, which is time-consuming and costly.

Table I- Proportion of unemployed adults with a tertiary degree

<table>
<thead>
<tr>
<th>Country</th>
<th>2000</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tunisia</td>
<td>3.3%</td>
<td>21.9%</td>
</tr>
<tr>
<td>Syria</td>
<td>3.5%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Morocco</td>
<td>3.6%</td>
<td>17.8%</td>
</tr>
<tr>
<td>Jordan</td>
<td>3.6%</td>
<td>15.5%</td>
</tr>
<tr>
<td>Egypt</td>
<td>2.9%</td>
<td>24.6%</td>
</tr>
<tr>
<td>Korea</td>
<td>2.9%</td>
<td>27.7%</td>
</tr>
<tr>
<td>UK</td>
<td>2.1%</td>
<td>24.8%</td>
</tr>
<tr>
<td>Sweden</td>
<td>2.3%</td>
<td>28.4%</td>
</tr>
<tr>
<td>Spain</td>
<td>2.9%</td>
<td>24.8%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>3.6%</td>
<td>24.8%</td>
</tr>
<tr>
<td>Ireland</td>
<td>3.8%</td>
<td>28.4%</td>
</tr>
<tr>
<td>Germany</td>
<td>3.3%</td>
<td>31.5%</td>
</tr>
<tr>
<td>France</td>
<td>3.3%</td>
<td>34.3%</td>
</tr>
<tr>
<td>Finland</td>
<td>3.3%</td>
<td>37.7%</td>
</tr>
<tr>
<td>Denmark</td>
<td>3.8%</td>
<td>4.9%</td>
</tr>
<tr>
<td>EU average</td>
<td>3.5%</td>
<td>4.9%</td>
</tr>
<tr>
<td>OECD average</td>
<td>3.5%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

Kosaraju and Zaafrane (2011) in WB-AFD Study Breaking Even or Breaking Through.

4. The Tunisian Labour Market: Identifying the Comparative Advantage

There are a number of Tunisian public agencies engaged in facilitating labour migration. The three main agencies tasked with implementing labour migration policy in Tunisia includes: (i) the National Agency for Employment and Independent Work (ANETI) under the Ministry of Vocational Training and Employment and who are in charge of labour intermediation in Tunisia and abroad; however, they have no physical representation in other countries; (ii) the Tunisian Agency for Technical Cooperation (ATCT) under the Ministry of Planning and International Cooperation, they typically have specialized in secondments and have attaches based in Tunisian embassies in the MENA region and (iii) and the Office for Tunisians Abroad (OTE) under the Ministry of Social Affairs in charge of supporting and assisting the Tunisian diaspora. In addition, there is also the Bureau of Emigration under the Ministry of Vocational Training and Employment and the Secretary of State for Migration and Tunisians abroad.

The comparative advantage for the Tunisian labour market is directly related to those occupations in major industry sectors of the economy, including tourism, ICTs, manufacturing, mining and agricultural production. Each of these sectors is serviced by a range of foreign and domestic enterprises, as per the pre-revolution
economic policy of creating a sizeable offshore market in Tunisia. Almost 11.5 per cent of Tunisia's working population was employed in the tourism sector; whereas the ICT sector produced fewer jobs, it still accounted for 10 per cent of the country's GDP in 2008. Women represented 23 per cent of all tourism employees, and 41 per cent of the ICT workforce (European Training Foundation, 2010).

The domestic manufacturing sector has required workers to have skills in boiler making, welding, transformation of steel, metal construction and equipment manufacturing (www.tunisieindustrie.nat.tn). The domestic mining, oil and gas industry, together with Tunisia's proximity to the sizeable oilfields in Libya, has produced a number of Tunisians with skills in pressure welding, pipefitting, industrial construction, general labour and fabrication.

ANETI is the Tunisian government agency most involved in receiving and posting offers from Canadian employers, many of who have been directed to ANETI services via the Canadian embassy in Tunis. The majority of Canada-based job offers posted to ANETI have been targeted at those Tunisian workers qualified in skilled trades professions (www.aneti.nat.tn) related to manufacturing, construction, mining, oil and gas. In fact, Canadian enterprises represent the tenth largest foreign investor in Tunisia (FDI flows at $0.5 billion) and the second largest investor in the oil and gas sector (Canadian embassy in Tunis).

5. Canada: A Booming Economy that Needs Immigrants

The Canadian economy was the strongest economic performer among all G7 countries in the post-recession period; however, in the second half of 2012 the economy slowed somewhat. Slumping mining, oil and gas production reduced the country's manufacturing and construction output. However, the energy industry managed to recover by the end of 2012 (Wright, 2013) and overall Canada registered another strong year of employment gains with 310,000 jobs created.

Canadian economic growth is expected to be 1.7 per cent in 2013, before picking up to a healthier 2.5 per cent in 2014 (Wright, 2013). Forecasts predict employment levels to increase by 200,000 to 250,000 in 2013 and 2014, with the unemployment rate falling below seven per cent at the end of 2013 (Wright, 2013). Economists expect western Canada to benefit the most from activity related to natural resources, with the provinces of Saskatchewan and Alberta to grow at rates exceeding the national average. However, in provinces east of Manitoba (such as Quebec) projected growth will likely be lower than the national average (Ferley, 2013).

The Canadian labour force needs immigrants. The Baby-boomer cohort (45-64 years) represents a large share of the labour force (Table II), but this cohort is beginning to retire. Although the fertility rate rose to 1.66 children per woman in 2007, it is still considered well below what is needed (2.1 children/woman) to support a labour market that can sustain growth (Hodgson, 2010). These factors are eroding the growth in the supply of labour. Immigration is Canada's solution to address its internal demographic challenges with immigrants now accounting for more than 20 per cent of the population. Analysis suggests that the annual (permanent) immigration target would need to be raised from its current 250,000/year level to at least 350,000 after 2016 in order to offset the impact of the aging population (Alexander, 2012). Given the demographic challenges observed across Canada, it is important to remember that for many Canadian stakeholders, the immigration preference is towards permanent residency.
Since the 1960’s, successive Canadian governments have seen immigration as a fundamental part of nation-building, based on a sustained high-level intake regardless of economic cycles and informed by a human capital model of immigrant selection. The Canadian Minister of Immigration (December 2012) stated "We are making our immigration system faster and more flexible, and cutting red-tape for the skilled immigrants Canada's economy needs to grow and thrive." The prevailing view in Canada shared by the majority of citizens is that immigrants are assets to the nation.

The Immigration and Refugee Protection Act of 2002 (IRPA) governs immigration in Canada. This legislation seeks to balance economic, social and cultural development goals. The IRPA facilitates the temporary and permanent movement of people, while ensuring the health, safety and security of the Canadian population. Citizenship and Immigration Canada (CIC) must balance the role that immigration can play to support Canada’s economy with the reunification of families and the fulfillment of Canada's humanitarian responsibilities (CIC, 2012). Given Canada's bilingual identity, specific linguistic provisions were incorporated under the IRPA to give impetus to Francophone immigration (see Annex III, under NOC list). Moreover, Canada believes there are economic benefits to be achieved from a bilingual identity.

The Minister of Immigration and the department of CIC have made a number of significant policy changes to increase efficiency in the immigration system and to strengthen labour market responsiveness. The changes aim to create a fast and flexible immigration system that selects the best candidates, not necessarily the first to apply (CIC, 2012). For the GoC a prearranged job offer and language ability (in at least one of the country's two official languages) are the key determinants to an immigrant's success in Canada. The GoCs immigration policy changes correspond to findings from surveys of new immigrants about the difficulties they have faced since arriving in Canada (Table III).
Table III - Difficulties faced by new Immigrants to Canada

Relevant policy changes to Canada's immigration system include (i) shifting the priority for selection towards skilled based migration (Table IV); (ii) establishing a skilled-trades specific VISA category; (iii) devolving more constitutional powers to the provinces as they are in a better position to determine labour market needs; (iv) expanding use of the temporary foreign worker (TFW) program to help Canadian employers respond to significant labour shortages, these are targeted at a range of high, semi to low skilled levels; (v) creating the Canadian Experience Class (CEC) which provides greater flexibility for TFWs and international students in Canada to apply for PR and (vi) launching the pan-Canadian framework on the assessment and recognition of foreign credentials in 2011. Annex III provides more in-depth information on all the Canadian immigration categories and the federal NoC system Canada uses to determine occupations in demand.

Table IV - Changing Federal Immigration Priorities towards Skilled Migrants.

In 2011: 248,745 New Permanent Residents

There is a key difference between Canada's permanent residency (PR) intake and the intake of temporary residents (including visitors, TFWs, international students). The important point of differentiation is that the
intake for PRs is managed and each year the Minister must table the annual immigration levels before Parliament. Since 2007, the planning range has averaged between 240,000 to 265,000 admissions (CIC, 2012). On the other hand, the intake for temporary residents on annual basis responds to demand. In 2011 the total number of TFWs in Canada was approximately 300,000. Table V shows economic immigration by VISA category for the 2011 calendar year. For both PRs and TFWs, the government proposed (March 2013) new user fees (an exact amount is not yet confirmed) on a per application basis due to the expense involved with processing a growing number of applications.

Table V- Economic immigration: the current suite of programs (CIC, 2012)

<table>
<thead>
<tr>
<th>National</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Skilled Worker Program - applicants are assessed on criteria such as age, language, education.</td>
<td>57,297</td>
</tr>
<tr>
<td>Canadian Experience Class - Open to skilled TFWs, + international students already in Canada</td>
<td>6,027</td>
</tr>
<tr>
<td>Business Immigration - Investors, entrepreneurs and self-employed</td>
<td>11,641</td>
</tr>
<tr>
<td>Temporary Foreign Worker (TFW) (i)- Employers who cannot find a Canadian option to hire a TFW.</td>
<td>190,679 (new)</td>
</tr>
<tr>
<td><strong>Temporary Foreign Worker (TFW) (ii) - Total in country (includes stock and flow)</strong></td>
<td>300,111 (total)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Provincial/Territorial</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quebec-Selected Skilled Worker Program - Quebec manages its own program for skilled workers destined to the province of Quebec.</td>
<td>31,490</td>
</tr>
<tr>
<td>Provincial Nominee Program (PNP) - Provinces and Territories (other than Quebec) nominate workers subject to their specific labour market needs.</td>
<td>38,418</td>
</tr>
</tbody>
</table>

Despite the geographic distance, Tunisia and Canada have shared over fifty years of positive bilateral relations. The Tunisian diaspora in Canada is numbered around 20,000 and the two countries share a common language in French. On an annual basis, approximately 2,000 Tunisians enroll in Canadian colleges and Universities, second only to France as a preferred destination of study (Canadian embassy in Tunis). Meetings with the Tunisian Ambassador in Ottawa confirmed the strong bond between Canada and Tunisia. The Ambassador signaled his strong commitment to actively follow-upon the study's recommendations.

6. Destination Canada: Maximizing a Key Advantage for Tunisian workers

Canada is a bilingual country. The importance of linguistic duality is seen in the federal government's implementation of the Official Languages Act, which was established to ensure respect and equality for English and French as well as support for the development of English and French linguistic minority communities (Office of the Commissioner of Official Languages). The 2002 IRPA legislation incorporated linguistic provisions that gave impetus to francophone immigration and particularly to the 1.3 million francophones residing in Francophone Minority Communities (FMCs) outside the province of Quebec (see Annex I).

In Canada, Quebec continues to receive the majority of Francophone immigrants with the bulk coming from EU countries such as France. Given the significant Maghreb (Tunisia, Algeria, Morocco) diaspora based in Montreal, Quebec is also their preferred destination. To directly support FMC communities outside Quebec, the federal government created an action plan (2009-2013) with the key objective of increasing the annual threshold of French-speaking immigrants settling in FMCs to support their demographic base. The significance of these policies is matched by a substantial budget: $1.1 billion over five years (2008-2013) to ensure economic vitality and social vibrancy of FMCs.

FMCs set a national target of 10,000 Permanent Residents/year and 2,000 francophone students/year. They believe these targets are necessary to ensure their demographic resilience; however, in actuality the annual intake of francophone immigrants is closer to 3,500 (a large percentage of which are refugees). By the end of
In 2013, the target rate for FMCs is to increase the immigrant intake to 6,000 new PRs. FMCs communicated during interviews that this is the last year of the action plan (2008-2013) and thus they are eagerly awaiting approval of a new strategy and budget.

The department of CIC was provided with $20 million for the direct recruitment of francophones as part of the action plan to support FMCs. Since 2003, the GoC through its Destination Canada program, has worked in partnership with public employment agencies in France and Belgium to support FMCs in Canada with francophone recruitment. This has included the establishment of a website (http://www.destination-canada-forum-emploi.ca/accueil.php?lang=en) and the hosting of overseas recruitment fairs. Tunisia was added as the third and only non-EU country to Destination Canada in 2009. In November 2012, Tim Hortons and Jacobs Engineering were two western Canadian enterprises participating in Destination Canada recruitments in Tunis.

For Canadian employers with operations outside the Province of Quebec, Destination Canada offers two significant advantages that were reinforced in meetings with industry, particularly in Manitoba and Saskatchewan where the majority of enterprises are SMEs with modest HR budgets:

1. Fast-tracked immigration processing, including waving the Labour Market Opinion\(^3\)(LMO) requirements for recruitments of francophone workers in the (semi-high skilled) NOC O, A, B categories; and,

2. Substantial funding to FMC communities to support newcomers (i.e., language & settlement support). SMEs in Saskatchewan and Manitoba communicated the importance of FMCs support to workers they recruited as the FMCs strong engagement provided additional comfort to SMEs in that they did not feel "all alone" in welcoming/settling their new workers. In fact, FMC support to francophone foreign workers serves as an ad hoc diaspora where such a diaspora does not currently exist.

\(^3\) An LMO is a 'green light' from the government of Canada that the employer has made satisfactory attempts to find domestic worker(s), and is therefore now eligible to recruit foreign workers.
Chapter I: Alberta
I Alberta

1. Alberta: Socio-Economic issues

1.1 Economic factors
Alberta's Gross Domestic Product (GDP) totaled $287 billion at the end of 2011. Crude oil production surged to a record high, which allowed provincial manufacturers, retailers, and wholesalers to enjoy substantial sales increases. Economic forecasts predict the continued economic boom will not "miss a beat" despite increasing challenges in delivering rapidly expanding oil production to foreign markets. A GDP growth rate of 3.5 per cent is expected for 2013, with GDP growth set to accelerate to 4.2 per cent by 2014 once major players in the oil sands break from their "holding pattern" and continue capital spending on mega projects (Ferley, 2013b).

Mining, oil and gas resources drive Alberta’s economy: the energy sector accounts for 27% of the province's GDP (2011). Alberta has the world's third largest proven petroleum reserves, after Saudi Arabia and Venezuela. Other major GDP contributing industries have shown substantial growth over the past two decades. From 2010 through to 2011, the construction sector grew from 6.7 per cent of GDP to 8.6 per cent. Finance and real estate grew from 11.0 per cent to 14.0 per cent and business and commercial services from 5.5 per cent to 9.5 per cent. In addition, manufacturing (6.4%), transportation (7.0%) and tourism services (4.7%) also made strong contributions to the Albertan economy.

In 2011, Alberta exported $93.1 billion worth of goods, predominantly to the U.S.A. ($80.7B), China ($3.0B), Europe ($1.5B) and Latin America and the Caribbean ($1.8B). Energy continued to be Alberta's most important export which accounted for 70% of the total value of Alberta's exports (2010), this was followed by agricultural goods, chemicals and plastics, manufactured goods and forestry exports (Alberta Ministry of Enterprise and Advanced Education, 2012).

1.2 Demographic factors
Alberta's population was estimated at 3.874 million in July 2012. The Albertan labour force is aging, from 2006-2011 the number of Albertans over the age of 45 grew twice as fast as those under 45 years of age, with the fastest growth occurring in the 55 to 64 age group (Alberta Ministry of Economics, Demography and Public Finance, 2011b).

Alberta led all provinces in population growth, mainly due to strong inflows from other provinces and immigrants. Alberta's population has grown at 2.5 per cent since 2006. Immigration continues to be the main driver of population growth. On a census year basis, Alberta attracted more than 66,000 net migrants in 2011-2012, the second highest annual level on record and more than double the number experienced the year previous.

Good job prospects attracted more people to live in the province, and rising net in-migration boosted population growth to a five year high. Population growth in province has also benefited from a high birth rate and a relatively youthful adult cohort. This has resulted in a virtuous economic circle: initiated by a surplus of jobs, population growth creates further jobs across several industries (HRSDC, 2013c).

Alberta's workforce is projected to be 77,000 workers short between 2009 and 2019, with overall demand substantially outpacing supply by 2015 (Woo-Paw, 2011). On a longer term forecast to 2041demographic scenarios put Alberta's population between 5.5 to 6.5 million people. In these scenarios, future population growth would primarily be driven by international migration, with an anticipated increase of 874,700 international migrants arriving from other parts of the world (Alberta Ministry of Economics, Demography and Public Finance, 2011a).
1.3 Labour Market overview

Alberta's working population is approximately 2.1 million total employed. Since 2001, Alberta has grown on average by 46,350 new jobs per year, a growth rate of 2.5 per cent per annum. The global recession resulted in increased unemployment, but that has recovered and is at a balanced level (Alberta Ministry of Employment, 2012e). From 2006 to 2010 Alberta's unemployment rate averaged 4.7 per cent but in 2012 the unemployment rate fell to approximately 4.3 per cent and is forecasted to drop even further in 2013.

Capital investment in Alberta's energy industry eased during the second half of 2012, resulting in job losses in Alberta's goods-producing sector. These losses (10,400) were more than offset by the service producing employment gains (+22,800). On a year-over-year basis, Alberta's goods-producing sector accounted for 95 per cent of all employment growth, reflecting greater activity in oil extraction, utilities, construction and manufacturing (HRSDC, 2013c). The combined growth in manufacturing industries totaled more than 10,000 positions in 2012.

As of December 2011, 63.4 per cent of the labour force 25 years of age and older reported holding a university degree or diploma. There were 57,000 registered apprentices training at approximately 14,500 different employer sites around Alberta. With the exception of the 2008-2009 years, employment in the Province has been so abundant that the province experienced a tight labour market, with too few people chasing too many jobs. The result was employers bidding against each other to attract workers, and as a result average weekly earnings in 2011 were 18 per cent higher than they were nationwide (HRSDC, 2013c).

2. Alberta and Immigration Policy

2.1 Overview and Key Public Policies

Alberta has a much larger population size than Manitoba and Saskatchewan. The Albertan economy is driven by a number of large corporations servicing the mining, oil and gas industries. Given the dominance of larger corporations serving the boom and bust natural resource industry, immigration in Alberta is driven by a demand for short-term labour needs, making the Temporary Foreign Worker (TFW) program very popular.

Until 2006, less than one percent of the Province's total labour force was TFWs. The TFW population (see Table I) grew from 9,349 workers in 2000 to 57,774 in 2010. Population levels began to increase significantly in 2004 and increase consistently year after year until the financial crisis in 2008-2009. The majority of TFWs have come from English-speaking countries such as U.S.A, UK, and Australia. However, over the last five years TFWs are increasingly coming from the Philippines, Mexico, India and China (Woo-Paw, 2011).
TFWs who come to Alberta are classified (using the NOC system as per Annex III) in either high-skilled occupations or low and semi-skilled occupations. The top five occupations in Alberta expecting severe labour shortages by 2015 were the construction trades, registered nurses, orderlies and patient service associates, oil and gas drilling related labourers and oil and gas service operators (Woo-Paw, 2011). Those in high-skilled occupations have a more direct pathway to Permanent Residency: either through Alberta's Immigrant Nominee Program (AINP) or through one of the federal government's immigration pathways (Annex III). Pathways to PRs are much more restrictive for TFWs in low and semi-skilled occupations.

In response to the significant growth in the TFW population in recent years, a TFW Support Services pilot project began in 2008 targeted at TFWs, their dependents and employers. In 2012-2013, Alberta took over the pilot investing $1.0 million to offer support services to TFW in seven Albertan communities. Services included needs assessments, information sessions, housing and school support for children of TFWs. It should be noted however, that this support was provided almost exclusively to high-skilled TFWs whom had the highest probability of immigrating to Alberta permanently.

The Albertan government takes a much more "hands off" approach than either Saskatchewan or Manitoba in transitioning TFWs into Permanent Residents. Alberta believes in maximizing the skills and talents of Albertans first, before looking to other sources of labour such as TFWs. This approach is reflected in the machinery of government operations, as there is no specific department dedicated to immigration. Therefore, immigration is only one of the government's six priority areas under the Ministry of Enterprise and Advanced Education.

The AINP was designed to accept high-skilled immigrants, but since 2010 there has been greater flexibility in allowing more applications from a limited number of low and semi-skilled occupations including tourism and hospitality, food services and the food and beverage processing sectors. Through the government's labour market forecasting, Alberta chooses its AINP nominees based on upcoming shortages. The majority of the AINP applications are from individuals already working in the Province as TFWs. The 2010 AINP limit set by the federal government was 5,000 nominations, of these approximately 70 per cent were nominees in skilled occupations and 30 per cent were in low and semi-skilled occupations.
To understand the growth rate of Permanent Residents, the number of PRs arriving in Alberta in 2009 was 11 per cent higher than 2008. This number continued to increase in 2010, showing a 20.8 per cent increase from 2009 (Alberta Ministry of Finance and Enterprise, 2012c). Source countries for Permanent Residents in 2010 included the Philippines (41.9%), India (15.3%), China (7.2%), UK (3.3%), Pakistan (3.2%), Mexico (2.9%) and U.S.A (1.4%). The top NOC positions for these PRs included light duty cleaners, food processors, hotel clerks, truck drivers, plasterers and shippers/receivers.

2.2 Process for Entry - Immigrating to Alberta

There are three distinct routes for migrating to Alberta. An immigrant can arrive as a TFW, or via nomination by the AINP (typically most are TFWs already in the Province) or through one of the federal CIC categories. To be eligible to recruit TFWs, an employer must apply to a local HRSDC office for an LMO. Once this process is completed, then the employer recruits their foreign worker(s) directly or through another third party. The worker then receives the LMO and job offer from their employer and submits the full application at their nearest Canadian embassy. CIC then issues a work permit to the TFW based on the job offer and the foreign worker's admissibility into Canada, subject to health, criminality and other background checks (Alberta Ministry of Finance and Enterprise, 2012d).

The Albertan government has received numerous complaints about unscrupulous third-party recruiters especially associated with the TFW program. Officials commented that there is legislation to address this problem under Alberta's *Fair Trading Act and Employment Agencies Business Licensing* Regulation, which forces third parties to register and commit to standards (Woo-Paw, 2011). The provincial government also provides some guidance on immigration to local industry, especially where job shortages are most acute. Table II below provides industry with a good indication of which foreign workers had the most success in certain occupations.

**Table II - Alberta Apprenticeship and Industry Training (AIT)**

<table>
<thead>
<tr>
<th>Country</th>
<th>Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philippines</td>
<td>1. Steamfitter-Pipefitter</td>
</tr>
<tr>
<td></td>
<td>2. Welder</td>
</tr>
<tr>
<td></td>
<td>3. Electrician</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1. Electrician</td>
</tr>
<tr>
<td></td>
<td>2. Steamfitter-Pipefitter</td>
</tr>
<tr>
<td></td>
<td>3. Welder</td>
</tr>
<tr>
<td>India</td>
<td>1. Steam-fitter-Pipefitter</td>
</tr>
<tr>
<td></td>
<td>2. Welder</td>
</tr>
<tr>
<td></td>
<td>3. Automotive Service Technician</td>
</tr>
</tbody>
</table>

Alberta registered a major increase in the number of TFWs in the Province in 2007. However, this was not only due to an increased demand for labour. CIC had made policy changes that included increasing the maximum validity of work permits to two years including for TFWs in lower-skilled occupations. This

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4 An LMO is a 'green light' from the government of Canada that the employer has made satisfactory attempts to find domestic worker(s), and is therefore now eligible to recruit foreign workers.
maximum limit then increased to a four-year duration. Second, HRSDC introduced an accelerated LMO processing system, which expedited administrative procedures. Accelerated LMOs are typically reserved for employers with a positive history of hiring TFWs.

In any given year the TFW policy can be modified at the federal level. This occurs based on industry consultations, for example, if the LMO process is too onerous it can impact the profitability of a certain industry. Employers in Alberta continue to call for changes to the LMO process, including allowing them to apply across multiple locations and allowing a more open LMO process which would permit one employer to apply for only a single LMO (Woo-Paw, 2011).

For example, in the hospitality industry an employer who owns multiple hotels cannot apply for one LMO, they must apply for an LMO for each subsequent property (Woo-Paw, 2011). In the recent budget (March 21, 2013) the federal government again modified TFW policy by requiring all employers to now pay a small service fee for each TFW recruited. This is an interesting development given Albertan employers indicated that a major frustration with the TFW program is lack of consistency and frequent changing of rules (Woo-Paw, 2011).

For TFWs, especially lower skilled workers, there are frustrations in the apparent ambiguity around transitioning into full residency. Other frequently sighted challenges include more TFWs working outside major metropolitan areas (such as Edmonton and Calgary) and the difficulty of connecting with smaller, rural communities. TFWs face more barriers than do Canadians when looking at furthering learning opportunities. For example, TFWs are not allowed to be apprentices or take courses for credit counting towards certification.

Health and safety issues are also a frequent problem, with many safety violations involving TFW situations. This could be a result of language issues, or an employer being found in violation of an Albertan safety standard. The AINP program no longer accepts nominations from employers found in violation of basic safety codes. In 2007-2008, six Employment Standards Officers were assigned to respond to the needs of TFWs, including pay violations (Woo-Paw, 2011). Alberta has also established two TFW advisory offices and a Helpline with services in over 170 languages to assist in the protection of TFWs.

3. Destination Canada

3.1 Francophone support in Alberta
Given Alberta's TFW focus and the presence of a number of large companies with substantial HR budgets, Alberta FMCs are better suited to identifying smaller SMEs and offering targeted support to enable francophone TFWs to gain a comparative advantage. Moreover, meetings with Albertan government and its industry revealed geographic hiring preferences for countries in the region - including U.S.A, Mexico and the Caribbean. However, given the sizeable Filipino workforce the Albertan industry is also focused on recruiting from Asian markets.

In 2011, Alberta employers submitted 345 job postings through the Destination Canada website for candidates in Paris and Brussels. Albertan employers in attendance represented the construction industry, education, hospitality and IT. In November 2012 there was no Albertan FMC participation in any of the Destination Canada events in Tunis nor did any Albertan government employees participate in Tunisian recruitment. However, two large Albertan enterprises (Tim Hortons, Jacobs Engineering) participated in Destination Canada recruitments in Tunisia (2012). The Canadian fast-food chain restaurant Tim Hortons, following interviews with Tunisian candidates, found the majority had limited experience in the restaurant industry but on the other hand, they found many of the candidates interviewed had substantial hotel experience.
In 2006, the Franco-Albertan population included about 70,000 people (Francophone Community of Alberta, 2009). Francophones in Alberta represent 2.05 per cent of the total population, and are mostly found in suburbs around Edmonton and Calgary. The growth in population is a result of the influx of immigrants and interprovincial migrants. However, only 1.4 per cent of Albertans used French in the workplace. Interestingly, 27 per cent of immigrants living in an Albertan FMC came from an African country. The local Association canadienne-francaise de l'Alberta (ACFA) recognizes the importance of immigration and has established a strategic committee on immigration to meet demand. The ACFA and its local affiliates within Alberta have a number of programs and services available to help newcomers including language training, mentorship and job readiness training.

4. Industry: Selection of Albertan Industry seeking Foreign Workers

4.1 Hospitality and Lodging

The hospitality and lodging industry is key contributor to the Albertan economy. The accommodation and food services' share of Albertan GDP in 2011 was 2.2 per cent. The industry is expected to grow at an average rate of 2.4 per cent from 2011 to 2015. The accommodation and food service industry segment accounts for 60 per cent of total industry employment. By 2015 the accommodation and food service industry is expected to account for 6.2 per cent of Alberta's workforce (AHLA, 2012).

Examining the long-term trend from 2000 to 2011 employment in the accommodation and food services industry alone increased 17.5 per cent over the period from 111,300 workers to 130,800 workers. The unemployment rate in 2011 for the industry was at 5.4 per cent, slightly below the provincial rate of 5.5 per cent. The low unemployment rate in the accommodation and food services industry is indicative of a tight provincial labour market with a scarcity of people available to work (AHLA, 2012).

In the accommodation and food service industry, SMEs employing less than 50 employees account for a significant share of businesses (Table III). Part-time and seasonal work is more prevalent in the hospitality industry - 38% of those working in the industry were full-time, compared to 54 per cent of workers in other industries (Ministry of Enterprise and Advanced Education, 2012e). Proportionately more women than men work in the accommodation and food service industry; 62 per cent of accommodation and food service workers were female. Traditionally, the industry has relied heavily on its youth workforce with 47 per cent of all workers between the ages of 15-24.

Table III -Labour-force Characteristics Accommodation and Food Service industry

<table>
<thead>
<tr>
<th>Establishment Size</th>
<th>Businesses in Alberta</th>
<th>Businesses in Accommodation and Food Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of Employees</td>
<td>%</td>
</tr>
<tr>
<td>Less than 20</td>
<td>637,400</td>
<td>36.6%</td>
</tr>
<tr>
<td>20 to 99 employees</td>
<td>594,400</td>
<td>34.1%</td>
</tr>
<tr>
<td>100 to 500</td>
<td>326,300</td>
<td>18.7%</td>
</tr>
<tr>
<td>Over 500 employees</td>
<td>184,200</td>
<td>10.6%</td>
</tr>
</tbody>
</table>


Three major issues have challenged the accommodation and food service industry in recent times. The first is high staff turnover rates due to the seasonal nature of the work and youthful demographic. Many employers have experienced turnover in recent years in both entry-level and higher-skilled positions. The second challenge has been the relatively low wages: in 2006 the average wage rate was just over $12/hour: this was 43
per cent lower than the provincial average of $21/hour (Ministry of Enterprise and Advanced Education, 2012e). However, the average wages have increased considerably and in 2011 wages averaged $15.5/hour even for lower-level positions such as light-duty cleaners (AHLA, 2012).

The third major barrier to industry growth is a federal immigration program that remains unresponsive to industry needs. A survey conducted in 2006, revealed deep industry frustrations with current immigration legislation that limited the supply of potential workers because it favoured higher-skilled workers over lower-skilled. Moreover, given the SME nature of the industry (Ministry of Enterprise and Advanced Education, 2012e) many employers did not have the time and financial resources to devote to the complex TFW administrative application process.

The Alberta Hotel and Lodging Association (AHLA) conducted a more recent (2011) industry-wide survey. While only 50 per cent of its total industry responded to the survey, the data reveals some interesting findings on the industry's ongoing reliance on foreign labour. Almost half of all survey participants reporting hiring foreign workers since 2009, while the other half indicated they either do not or have not employed foreign workers. However, of these survey respondents, close to half (46%) plan on hiring foreign workers in the future. Nearly 23 per cent of foreign workers fell into the 15-24 age category, with an overwhelming majority (71%) of foreign workers between the ages of 25-44 years (AHLA, 2012).

A total of 2,034 foreign workers were employed, representing 11 per cent of the total workforce of survey participants. The top five source countries for foreign workers included the Philippines, Mexico, Australia, Japan and Korea (Table IV). In 2011, survey participants hired 902 TFWs and 225 departed. The common reason for a TFWs departure was to join another organization (importantly TFWs are not "tied" to their original employer), followed by an inability to renew an LMO. HRSDC accepted 90 per cent of all LMO requests received, with the most common reasons for rejection being insignificant domestic recruitment efforts.

Table IV-In-Demand Occupations and Foreign Workers by Country of Origin

<table>
<thead>
<tr>
<th>Occupations</th>
<th>Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel Front Desk Clerks</td>
<td>Australia, Brazil, Chile, China, Colombia, Czech Republic, Dubai, Germany, Hong Kong, India, Jamaica, Japan, Kenya, Korea, Mexico, Netherlands, Philippines, Republic of Korea, Saint Lucia, Sweden, United States, United Kingdom, and Ukraine</td>
</tr>
<tr>
<td>Light Duty Cleaners (Housekeeping Room Attendants)</td>
<td>Australia, Barbados, Chile, China, Curacao, Czech Republic, Dubai, Ecuador, Fiji, Germany, Haiti, Honduras, Hong Kong, India, Indonesia, Ireland, Israel, Jamaica, Japan, Korea, Lithuania, Mexico, New Zealand, Philippines, Poland, Republic of Korea, Russia, South Africa, Spain, Sri Lanka, Sweden, Taiwan, Thailand, United Kingdom, Ukraine, and Vietnam</td>
</tr>
<tr>
<td>Food and Beverage Servers</td>
<td>Australia, Chile, China, Colombia, Czech Republic, Ecuador, Germany, Honduras, India, Iraq, Ireland, Japan, Korea, Mexico, New Zealand, Philippines, Republic of Korea, Russia, Scotland, United States, and United Kingdom</td>
</tr>
<tr>
<td>Food Counter Attendants, Kitchen Helpers and Related Occupations</td>
<td>Australia, China, Colombia, Czech Republic, Ecuador, Germany, India, Jamaica, Japan, Korea, Mexico, Nepal, Philippines, Republic of Korea, Sri Lanka, and United Kingdom</td>
</tr>
</tbody>
</table>

Thanks to increased policy flexibility for lower-skilled employees, a majority of industry’s applications (67%) to Alberta’s AINP nominee program were accepted in 2011. The year-over-year AINP acceptance rate decreased 11 per cent and 2 per cent for 2010 and 2011 respectively. The most common reason for rejection of an AINP application was having a TFW permit expire during the AINP application process.
Four major industry occupations were viewed as significantly under-pressure and difficult to fill: light duty cleaners (housekeeping room attendants), hotel front desk clerks, food counter attendants, kitchen helpers, cooks and chefs and food and beverage servers. The most commonly requested positions in 2011 in both HRSDC LMO applications and Albertan AINP applications were for light duty cleaners. Interestingly, the survey revealed that more than fifty percent of participants do not provide employment orientation to new foreign workers, while only a minority of members indicated their company offered airport pick-ups, access to community associations and community bridging services.

4.2 The Energy sector: Mining, Oil and Gas

The energy sector is responsible for crude petroleum and natural gas extraction, completing and equipping wells, de-silting equipment and field gathering lines, mining for coal, metal ore, and non metallic mineral mining and quarrying. Typical occupations included mining and petroleum engineers, blasters, drilling service rig managers and drilling rig lease-hands. Increasingly, there is growing demand for broader support roles such as supply chain management business intelligence managers, procurement professionals and technical salespersons.

The industry is the largest in the Province contributing 27 per cent to Albertan GDP in 2011, or approximately $80 billion. In terms of Alberta's energy revenues, crude oil made up 75 per cent, natural gas (23%) and coal and sulphur (2%) (Ministry of Enterprise and Advanced Education, 2012d). It is important to remember that many spin-off industries are created around Alberta's oil and gas industry; including construction, manufacturing, transportation and maintenance (including Jacobs Engineering). A 2007 figure showed $121.3 billion energy-related construction projects were planned or are underway in Alberta (Ministry of Enterprise and Advanced Education, 2012d), with more than 60 per cent of these construction projects in the fast growing oil sands sector.

Since 2001 employment in the sector has increased from 96,100 people to 150,000 people in 2011. Employment in the industry is expected to grow at an average rate of 2.2 per cent from 2011 to 2015 and will account for 6.9 per cent of total employment in Alberta by 2015 (Ministry of Enterprise and Advanced Education, 2012d). According to a 2011 labour force survey of the 150,000 workers in the industry, 77 per cent were male and 33 per cent were female. Approximately 93 percent of the energy workforce was permanent, with many working overtime and some holding multiple jobs (see Table V).

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Alberta</th>
<th>Forestry, Fishing, Mining and Oil and Gas Extraction*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median Retirement Age (years)</td>
<td>64.7</td>
<td>N/A</td>
</tr>
<tr>
<td>Average Number of Hours Worked per Week</td>
<td>37.6</td>
<td>45.9</td>
</tr>
<tr>
<td>Multiple Jobholders (% of total employment)</td>
<td>6.0%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Average Job Tenure (months)</td>
<td>87.9</td>
<td>74.3</td>
</tr>
<tr>
<td>Employees Under Union Coverage (%)</td>
<td>23.2%</td>
<td>10.2%</td>
</tr>
<tr>
<td>Employees Working Overtime per Week (%)</td>
<td>25.8%</td>
<td>38.4%</td>
</tr>
</tbody>
</table>
The mining, oil and gas industry (Alberta Ministry of Employment, 2012e) outlined three critical challenges that impact the labour force. The first is a tight labour market, with very low unemployment rates set to continue in the Province there is intense competition for labour within the energy sector and between sectors. The energy sector draws all types of high and lower-skilled workers, with a trend by some companies to place less experienced workers into higher-skilled positions. Some companies operating in hard-to-recruit locations reported ‘poaching’ by competitors.

The second major challenge is an aging workforce, as older workers retire, the sector not only loses these workers, but also years of experience and training that cannot be easily replaced. The final challenge is an increasingly mobile workforce. The Albertan energy industry competes internationally, but also with other Canadian provinces for tradespersons. Those workers with higher skills can easily move back and forth between different provinces and sectors.

When the Albertan economy began to recover in Q2 (Quarter Two) 2010, the workforce trends shifted from cost reduction and low productivity to broad-based issues related to employee retraction and retention and labour and skills shortages. For Albertan energy companies, and its spin-off industries, the major concern continues to be employee turnover and managing expectations around compensation, with bargaining power shifting more towards employees (Petroleum HR Council, 2012b).

The Petroleum HR Council of Canada conducted an enterprise survey in Q1/Q2 2012 that found 91 per cent of survey respondents actively hiring; this number was up seven percentage points from Q3/Q4 2011 (Petroleum HR Council, 2012c). An increasing number of employers are turning to recruitment channels that offer them access to the broadest reach of workers, including advertising on company websites, government job boards, on-campus recruitments, HR companies and social media. The intake of TFWs has begun to significantly increase again after 2010, but international recruitment is still not a preferred channel with energy employers sighting administrative complexities, time constraints and overall higher costs.

HKAA is an Edmonton-based HR firm with three employees and has recruited foreign workers to the Albertan energy industry for the past ten years. The CEO spoke at an industry-wide event and this proved to be a critical step for them in making contacts and in-roads within the industry. He advised not to underestimate what a presentation to the Energy industry could do for boosting recruitments, especially offering some much needed visibility on the Tunisian workforce.

Consultations with HKAA revealed they are moving an average of 15-20 welders, insulators, pipefitters and iron workers from the USA every week to Northern Alberta. All their recruits are American, which means they receive port of entry VISAs on-arrival at the Canadian border. This type of simplified VISA is typically available for OECD countries only, and saves time and labour for recruiters on work permit processing.

HKAA firmly believes Alberta is one of the toughest recruitment markets due to the strict certification criteria around the trades. They hinted that some of this was due to protectionism within the industry, which corresponds to what was heard elsewhere within the industry. To address this, they have established a training workshop in Alabama, USA where they put their recruits through training that is pre-approved by Albertan employers who have visited the training site in Alabama.

As a result of a two-day stop-over in Edmonton, HKAA kindly introduced a number of their foreign workers, who were mostly from the southern USA. Several of these TFWs had worked alongside Tunisian workers in the past. Their direct feedback about working in this industry included the difficulties of cold weather and the long hours of work required often for weeks at a time, and then being off work for equal periods of time (source: HKAA interviews). The below Table (VI) was taken directly from the HKAA website, and offers insight into the labour demand and typical compensation for skilled TFWs in the oil and gas industry.
Table VI - Pressure Welder Job Description and Proposed Compensation

B Pressure Welders and Tig Carbon & Stainless Steel Welders

Project Description - Liquefied Gas Plant Process Upgrades

**Work Description** - Install new Carbon and Stainless pipes of all schedules and size, weld pipe tie-ins to existing piping and equipment.

**Location** - Northern Alberta - around 200 employees on site, all trades included.

**Living** - during work in a man-camp in Northern Alberta. On rotation out, you receive an allowance so you can travel or you can stay in Edmonton.

**Travel** - daily busing back and forth from to the work site. On rotations, flights are provided back and forth from Edmonton then ground transportation to site.

**Unionized job site (open shop)** - CLAC (clac.ca)

**Shift for**

B Pressure Welders and Tig Carbon & Stainless Steel Welders are:

- 14 days on, 7 days off

**Hours per day** - 10 hour days (140 hours per shift cycle, 95 Regular time & 45 hours overtime (1.5 time rate)) – this may move to 12 hour shifts. Night shift to be added mid February.

4% of base wage for holiday pay; 8% of base wage for vacation pay

Pays every week (Friday)** Union savings and pension plans

Tools provided but they need to supply their own PPE (including steel toed boots, long sleeve shirts, and pants or coveralls)

CLAC - B Pressure Welder base rate - $41.76 per hour

Safety Award - $0.50 per hour group & $0.50 per hour individual

Specialized welding premiums - $2 per hour when welding stainless, $3 per hour when welding chrome, $4 per hour when welding titanium

**Travel** - Flight from Edmonton to the job site provided each rotation; $125 per rotation since principle residence is over 224 km from Edmonton (max allowable). Within Canada, flight allowances depending on province of residence.

4.3 The Construction Industry

Construction is split into four categories of work in Canada, including New Home Building and Renovation (Residential); heavy industrial (the construction of large industrial projects); institutional and commercial (shopping malls, office buildings) and civil engineering (highways, dams, sewer lines, bridges).

The Albertan construction industry is the fourth largest industry in the Province; with the industry accounting for 8.7 per cent of Alberta's GDP or $18.1 billion in 2005. The industry benefits from robust oil and gas activity - capital expenditures related to mining, oil and gas extraction increased from $13.3 billion in 2002 to $33.1 billion in 2006. These projects also spawned other construction activity including infrastructure and residential projects (Ministry of Employment, 2008).

The construction sector council (2012b) predicts that Alberta will regain record levels of activity that peaked between 2006 and 2008. By 2011, increased activity had regained many of the jobs lost by the 2009 financial crisis. The forecast predicts that by 2015 the current industry's workforce will have its capacity significantly tested by increased demand. The workforce that left Alberta during the 2009 economic crisis will be drawn back by the recovery that started to accelerate in 2012. The start of 2013 saw labour requirements exceeding the available workforce for selected occupations (Construction Sector Council, 2012b). Across the next decade, the local construction workforce will need to attract 44,000 new workers to meet total labour requirements.

In terms of residential and commercial construction, growth over the last two decades had been driven by housing formations and housing starts; reaching a peak in 2006. The housing downturn from 2007 to 2009 had drawn housing 'starts' below formations, creating a backlog of demand that will carry residential construction and employment steadily higher from 2012 to 2018. Through 2013 and 2014, new construction and renovations will together raise the total residential employment back to 2006 levels.

Non-residential construction employment will rise steadily, gaining 20 per cent from 2012 to 2020. Employment is anticipated to increase at a moderate pace from 2012 to 2014 and new growth will drive labour
requirements even higher from 2015 to 2020. A big demand for new infrastructure is a core reason for this growth, including oil sands, pipelines, utilities and other industrial construction. Adding to this growth is increased activity in commercial and institutional building.

Albertan oil sands investment is forecast to rise slowly until 2014, and then grow rapidly to 2018. Complementing investment in oil sands will be increased activity in electric utility, transmission, pipeline and other industrial construction. In addition to new construction, labour requirements for sustaining capital, maintenance and shutdown projects will become a growing concern as more facilities are constructed over these forecast scenarios. These patterns will shift labour requirements toward trades linked to industrial and resource projects (Construction Sector Council, 2012b). Boilermakers, construction millwrights, welders, steamfitters and pipefitters, insulators and machine operators have been in short supply for years, and there will continue to be strong demand for these positions through 2018 (see Table VII).

Table VII - Labour Market demand through 2020 (Construction Sector Council)

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<tbody>
<tr>
<td>Boilermakers</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>3</td>
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<tr>
<td>Demand requirements related to industrial, engineering and maintenance work continue to rise across the scenario period. Labour market conditions return to balance by 2013 as some major projects begin to wind down. Increased new capital, sustaining capital and maintenance work tighten markets again between 2015 and 2019. Employment is exclusively in non-residential construction. The age profile for this trade is younger than average. Replacement demand requirements are not met by new entrants into the labour force. Workers from outside the local market will be required across the scenario to meet requirements.</td>
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<tr>
<td>Carpenters</td>
<td>4</td>
<td>4</td>
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<td>4</td>
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<tr>
<td>Demand requirements related to residential and non-residential construction continue to rise from already tight levels through 2018. Labour market conditions are generally tight across most of the scenario period. Employment is divided between residential and non-residential construction. A potential for mobility between these sectors may help to meet market requirements, but mobility may be limited by the portability of skills to meet labour demands for major industrial and engineering projects. The age profile for this trade is about average. New entrants into the labour force are estimated to meet replacement demand requirements, but workers from outside the local market will be required to meet expansion demand requirements across the scenario period.</td>
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<tr>
<td>Welders and related machine operators</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>3</td>
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<tr>
<td>Demand requirements related to industrial, oil sands and other engineering projects rise across the scenario period. Labour market conditions are balanced over the near term as some major projects begin to wind down, but tight between 2015 and 2018 as oil sands and other industrial activity increases. Employment is concentrated in non-residential construction. The age profile for this group is younger than average. New entrants into the labour force are estimated to meet replacement demand requirements; but workers from outside the local market will be required across the scenario period to meet expansion demand requirements.</td>
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While the Albertan Oil and Gas industry is driven by larger corporations, it is SME-sized businesses (fewer than 100 employees) that make-up the majority (80%) of the Albertan construction industry. A survey (Alberta Ministry of Employment, 2012e) of this industry revealed 98% of businesses faced hiring difficulties. As a result of these hiring challenges, companies tended not to pursue new business opportunities or increased responsibilities of existing staff.
A large proportion of Alberta's major construction projects over the next ten years will be in communities outside urban areas such as Calgary or Edmonton. Enterprises building these projects will face growing challenges retaining workers because of a reluctance of many workers to live in "camps" or to be away from home for long periods of time (Ministry of Employment, 2008c). For the residential construction side, worker retention issues are plagued by the challenge of losing typically lower and semi-skilled workers to other employers offering higher pay or more attractive working conditions.

5. Strategic Considerations: Opportunities for Tunisia

5.1 The Alberta Hotel and Lodging Association (AHLA)

The hotel and lodging industry contributed over $6.0 billion to the Albertan economy in 2012. The workforce added 6,000 new jobs from 2010 to 2011 totaling 130,000 workers. The industry is characterized by a majority of SME-sized enterprises with less than fifty employees, many of whom work part-time or seasonally.

The AHLA is a non-profit association that serves Alberta's tourism and hospitality industry. Established in 1919, the association represents almost 1,000 members with properties across Alberta including hotels, motels, campgrounds, inns, resorts, bed and breakfasts and lodges. The AHLA is the voice on their industry's labour needs and in 2011 conducted a survey with members to better understand and help address the industry's labour market complexities - particularly the ongoing labour shortages. The main occupations include light duty cleaners, front-desk agents and food and beverage supervisors.

The AHLA is looking for a more long-term and sustainable strategy that would enable their industry to access the labour it needs to serve local, national and international visitors. Interviews with the CEO of the AHLA revealed that the industry has been using TFWs to fill gaps in the local labour supply for more than ten years. The CEO felt that TFWs in his industry were, in actuality, filling FTE positions. The industry is heavily reliant on TFWs and frequently advocates for less administration around the processing of foreign workers. Some of the major constraints for the industry:

i) An onerous LMO process, whereby when a position becomes vacant from a departing TFW, the cannot fill this position without re-applying for another LMO from HRSDC;

ii) An employer who owns multiple hotels must launch one-LMO per each property; and,

iii) Given the seasonal nature of the work, employers are often unable to provide full-time hours to all employees but they are obliged to provide full-time hours to TFWs.

There are specific TFW related challenges for the industry. Employers are obliged to cover some of the transportation and accommodation costs of foreign workers because of the lower-skilled occupations connected to the industry. But given the shortages across a wide spectrum of Albertan industries, many TFWs are "recruited away" (poached) to work in higher paying jobs that provided services directly to the mining, oil and gas companies.

The result for AHLA members is a very large, up-front expense to cover the initial entry and settlement of the TFW only to see this same worker recruited by another industry. Another major issue is a desire for a diverse workforce. Many AHLA members have a workforce that is over-represented by one source country that created sub-cultures among staff. The feedback from employers was that this had a negative impact on business and so there are more efforts being made now to expand the workforce geographically.

The AHLA does not get directly involved in overseas recruitment but given how popular the Philippines is as a source country, they have provided guidance to members that conduct overseas recruitment missions. Most of the members in his industry, due to the smaller SME size, rely on third party HR firms to identify workers.
overseas. In the past the AHLA offered members referrals on third-party HR firms from the Philippines (posted on their website), but as a result of concerns about the questionable practices of some firms this practice was abandoned.

As a result of their experience, the AHLA now prefers to negotiate recruitment agreements with certain countries. Interviews revealed that the AHLA and the Ministry of Labour in Jamaica recently signed a Memorandum of Understanding (MoU) to facilitate the recruitment of Jamaican workers to Alberta. The CEO and members of the AHLA viewed the Jamaican labour market favourably because:

i) of its regional proximity to Canada;

ii) Jamaican hotel workers have industry experience and are a proven labour source;

iii) less administration due to CIC familiarity with Jamaica and airline travel discounts; and,

iv) engagement with Jamaican government to ensure quality assurance - on the recruitment of workers in Jamaica and with the presence of Jamaican consulates in western Canada.

The CEO invited Tunisia to approach the AHLA to familiarize its Board and key members with the Tunisian workforce. The CEO was honest about stating a number of countries have approached their association with only a few chosen. However, Tunisia represents an experienced labour supply that could fill many of the key occupations in demand given the significant hotel and tourism industry in the country. Moreover, similar to the Philippine's public job agency (the POEA) and Jamaica's ministry of labour, Tunisia has two key public job agencies that have been historically active facilitating international recruitments: the ATCT and ANETI. While Tunisia does not have consulate representation in western Canada, on arrival support and assistance could be explored further with francophone settlement agencies in Alberta.

The CEO confirmed that despite the loss of workers to other industries and the seasonal nature of the industry his members are interested in long-term labour solutions. A TFW is not a good investment if there is substantial turnover: either from an expired work permit or "recruited away" to another industry. Employers in the industry are fully aware that to keep workers in the industry they must offer advancement opportunities and eventually more stable employment.

To meet these objectives, the AHLA is helping its members through signing MoUs that better help to attract and retain workers. The AHLA also provides guidance on transitioning TFWs to the Alberta AINP program, encouraging recruitments of TFWs with at least 2-years hospitality experience and training all workers including offering English language training.

5.2 Opportunities in the Mining, Oil and Gas industry
The industry is the largest in the Province contributing 27 per cent to Albertan GDP in 2011, or approximately $80 billion. Since 2001 employment in the sector has increased from 96,100 people to 150,000 people in 2011. For the mining, oil and gas industry and for those industries directly linked to it such as industrial construction; a shortage of skills for occupations such as welders, boilermakers, pipefitters, steamfitters, general labourers, industrial mechanics and construction millwrights is the new norm with forecasts indicating the situation will only become more challenging. One transnational company and two major associations servicing the oil and gas industry were interviewed.

5.2a Jacobs Engineering Inc.
Jacobs is one of the world's largest providers of technical, professional and construction services, including all aspects of engineering, construction, operations and maintenance. They are an international company that
provides services for many different organizations, including industrial, commercial and government clients across multiple markets and geographies. Their global network includes 200 offices in over 25 countries including in the Middle East and Africa, with headquarters in California, USA. In 2011, Jacobs had revenues of over $10 billion and employed more than 60,000 employees worldwide.

In Canada Jacobs provides services to the energy industry through maintenance turnarounds. The occupations most in demand at Jacobs are welders, boilermakers and pipefitters who are needed to conduct the maintenance turnarounds. Jacobs Canada is based in Alberta, with over 23 sites and five offices across the country. Jacobs is Canada's largest building trades employer with a workforce size of 4,500 maintenance professionals across the country and 9,500 required during peak turnaround season. Discussions with Jacobs HR indicated the Canadian workforce will not fulfill future projection demands resulting in significant demand for TFWs.

Jacobs typically requires all foreign workers to have a minimum of five years experience, to be trade certified and to have foundational English language ability. The company works directly with a large union maintenance contractor in Canada and therefore, beyond some basic safety training, Jacobs cannot provide any technical training to TFWs as per union requirements.

At five years minimum experience, Jacobs clearly seeks only high-skilled workers. Successful Jacob's candidates are very well compensated and receive excellent wages and benefits and travel and accommodation support. Pressure welders are the highest skilled due to the technical complexities of the work and therefore receive the highest wages for the welding trade (as per above table VI).

The key challenge for a Tunisian TFW is the uncertain time-frame associated with maintenance work, with projects lasting anywhere from four weeks to six months. For future high-skilled Tunisian workers who must travel all the way to Alberta, despite the promise of very high wages and some travel support, minimum contract duration should be secured with Jacobs representatives before departure.

Jacobs was one of the few Canadian companies that travelled to Tunisia for Destination Canada recruitments in November 2012 (the author of this chapter also participated and observed the recruitment process firsthand). The company was seeking to recruit sixty boilermakers, pipefitters and pressure welders. ANETI worked closely with the Canadian embassy to pre-screen approximately fifty candidates for Jacobs to test at the Kram training centre in Tunis. Interestingly, Jacobs travelled with three-staff members; including two HR staff and one quality assurance (QA) manager. The QA manager was equipped with the technical skills to personally oversee the Kram instructors and judge the final welding tests of each candidate.

The recruitments and testing lasted three days at Kram, with approximately 40-45 candidates tested and interviewed. This number was only slightly less than what Jacobs had anticipated. However, Tunisian candidates only tested as welders with no boilermakers or pipefitters pre-identified. Notwithstanding the incredibly technical nature of pressure welding, the QA manager found two candidates that successfully passed the Jacobs welding test and who were subsequently offered employment applications.

In addition, six to seven Tunisian candidates came close to passing the welding test. The QA manager indicated that with an additional three to four weeks training they would satisfy requirements to become an Alberta pressure welder. However, it was not clear how the Kram training centre and ANETI were coordinating to ensure these candidates would receive additional training. One suggestion could be to have a lead Kram Instructor and one of the successful candidates who passed the test offer short-term training to those candidates who needed a few weeks more training.

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5 A “turnaround” is a planned, periodic shut-down (typically from four weeks to six months) of an oil refinery process unit or plant to perform needed maintenance, overhaul or repair operations and to inspect, test and replace process materials and equipment.
Jacobs expressed support for Tunisian and Canadian embassy officials who facilitated this international recruitment process; especially given the Destination Canada program for Tunisia is only in its third year. Feedback was collected from Jacobs on how to improve logistics and coordination:

i. **Candidate arrival process and screening**: over the three days there was confusion on which candidates were there to be interviewed and where/when they were to be tested;

ii. **Kram instructors** - their role in the recruitment process was not clear; and,

iii. **Safety standards** - equipment and tools were not up to Canadian industry standard but more concerning was witnessing inadvertent violations of basic safety standards, safety being a critical issue for Jacobs given the sensitive work on oil pipelines.

Jacobs was appreciative of the supporting environment found in Tunisia, but only two candidates were identified in November 2012. Even for a large company like Jacobs, the expense to fly two HR staff and a QA manager to Tunisia for the net return of two candidates is not a positive return on investment. Further interviews with Jacobs signaled that the company would continue with international recruitments, but senior executives are not yet convinced on the merits of recruiting from Tunisia.

The critical issue for Jacobs is to ensure they recruit a minimum number of workers to ensure cost recovery for each overseas voyage. In Tunisia they were seeking fifty to sixty workers. It is understood that had Jacobs recruited even one-third of this volume, they would consider it a successful international recruitment. IOM has begun discussions on a potential recruitment agreement with Jacobs following the Destination Canada visit to Tunisia. One of the issues to be addressed thanks to the first-run experience in Tunisia is how to identify a minimum volume of work-ready candidates.

Jacobs' experience in Tunisia was insightful to further improve the recruitment process of high skilled candidates. If two or three candidates were found from forty short-listed candidates, then it is reasonable to assume that Destination Canada stakeholders should seek more information pre-arrival from companies like Jacobs in order to be crystal clear on candidate criteria (that is, a minimum of five years work experience) and reevaluate their internal screening processes for local candidates.

5.2b The ACTIMS and CISAA

The Alberta Council of Turnaround Industry Maintenance Stakeholders (ACTIMS) and the Construction Industrial Stakeholders Association of Alberta (CISAA) were established in 2009 and 2012 respectively to directly address the shortage of high-skilled labour in Alberta's energy industry. ACTIMS has three levels of stakeholders including the Oil Industry (for example, the company Shell Albian), the workers/unions and large maintenance contractors (such as Jacobs). CISAA also has three levels of stakeholders including heavy industrial construction owners, contractors and labour providers.

The primary objective of both associations is to work with their stakeholder members to identify skills shortages and to ensure all projects are fully staffed with available, qualified tradespersons. The focus is on Canadians first and then skilled, qualified TFWs from outside the country. There are two key differences in the labour requirements between ACTIMS and CISAA. ACTIMS requires just-in-time (JIT) labour due to the time-sensitivities of turnaround maintenance projects and higher skilled workers given the technical nature of the work. On the other hand, CISAA industrial construction projects are usually more long-term in nature and the labour requirements are typically for semi-skilled trades workers including construction craft labourers who perform demolition, excavation and compaction activities.
In-depth interviews were held with the President (who is the President for both associations) and with one member of the Board of CISAA. Both are former senior executives in the energy industry and well connected to the Albertan government trade certification agency (AIT) and the major oil and maintenance companies that service the industry. The President and the Board member have been involved in TFW advocacy since 2004, this included pushing the federal government to create the now-introduced (2013) skilled trades VISA stream. They have also been innovators on finding TFW program efficiencies in Alberta: creating an internal system where TFWs are able to work a number of different job sites while employed by multiple companies. Such TFW transfer between companies is a key service that ACTIMS and CISAA provide to members.

The Tunisian labour-force was introduced including a review of Jacobs' experience recruiting in Tunis. The executives expressed concern, not with respect to the skill-level of Tunisian labour, but rather the time-lag to bring Tunisians into Canada given the time-sensitivities of turnaround maintenance projects. Geographic proximity is one of the key reasons the American labour market is so popular for their members. Both executives were adamant that Tunisian labour is not a good fit right now for their ACTIMS members; however, they believe that Tunisian labour could be a better match for CISAA stakeholders given less time-sensitivities involved in the work.

Both ACTIMS and CISAA are very supportive of long-term, reliable labour solutions. The executives stated that on any one major contract with 10,000 workers on site the average turnover rate of labour is 25 per cent; therefore, retention strategies are critical. On the issue of recruiting Tunisian labour, IOM and Tunisia officials were invited for an informal 'meet and greet' discussion. This is an ideal entry point to access the Albertan energy workforce given the sheer number of jobs ACTIMS and CISAA represent. Their members will be seeking more direct information about Tunisian labour, including core competencies beyond the welding trades.

CISAA and ACTIMS invited IOM to make an in-depth presentation on the role it could play in facilitating such international recruitment. The IOM fact-sheet on recruitment facilitation services was shared with both CISAA and ACTIMS. In addition, the role IOM has played facilitating TFW recruitment from Guatemala into Canada was highlighted for reference. For ACTIMS and CISAA, any model/program/support service that injects greater confidence and efficiencies into VISA/work permit processing to expedite TFW access to the Canadian labour market is welcome.

6. Recommendations

Short to Medium-term

- The Alberta Hotel and Lodging Association (AHLA) is not interested in endorsing HR firms that offer recruitment services to its 1000+ members. The AHLA's preference is clearly towards signing labour agreements, as demonstrated by the MoU they recently signed with Jamaica's Ministry of Labour (an agency with similar administrative function to ANETI and ATCT). Given AHLa's history of offering English language training, this could form part of an agreement with Tunisia. Moreover, industry salaries for these lower-skilled occupations have increased ($15/hour), and this is due to intra-industry and inter-industry competition.

- The Tunisia labour market is at a geographic disadvantage; however, given the strength of the country's tourism industry and the institutional presence of public job agencies such as ANETI and ATCT, the CEO invited Tunisia to make a formal presentation to its Board.
This is an opportunity for ANETI and ATCT to outline the cost advantages of using their recruitment services (e.g., posting jobs, interviewing candidates, and following-up after their arrival) over that of third-party recruiters. They should also highlight the strengths of the Tunisian labour market, including a well-trained and available tourism workforce versed in multiple languages and, in an industry characterized with high turnover rates stress that TFWs from Tunisia represent a reliable and potentially long-term supply of labour.

This could be an ideal opportunity for Tunisian women in the tourism industry; given the higher percentage of female TFWs recruited into the Albertan tourism industry. The positions that should be targeted include front-desk agents and room attendants, with less focus on food and beverage servers. The Canadian fast-food chain restaurant Tim Hortons, following interviews with Tunisian candidates, found the majority had limited experience in restaurants but very strong experience working within hotels.

Jacobs Engineering is a major employer of skilled trades workers in Alberta's fast-growing energy sector. The company's HR team and QA Manager participated in Tunisia's Destination Canada event in November 2012. However, only two Tunisian pressure welders were recruited despite the expense of bringing three Jacobs staff members to Tunisia. Senior executives are not yet convinced on the merits of recruiting from Tunisia.

The critical issue for Jacobs is to ensure that on each round of international recruitments conducted, they come away from each country with a minimum number of successful recruits. The IOM is currently in discussions with Jacobs Canada, including how to address the important issue of identifying a minimum number of work-ready candidates.

For its part, ANETI and its partners within the Kram training centre should reflect on the constructive criticism received by Jacobs staff members to improve the process for future interviews - including improving safety standards in the workshop and ensuring ANETI and Kram instructors have coordinated so as to ensure minimal delays before, during and after scheduled interviews.

Medium to Long-term

The Alberta Council of Turnaround Industry Maintenance Stakeholders (ACTIMS) and the Construction Industrial Stakeholders Association of Alberta (CISAA) were established in 2009 and 2012 respectively to directly address the shortage of high-skilled labour in Alberta's energy industry.

In-depth discussions with senior executives from these two associations revealed that on the ACTIMS side of companies (such as Jacobs Engineering), a Tunisian labour-force is not feasible in the short-term as a result of the (current) lengthy administrative processing times for foreign workers. Of note is that this is a time-sensitive industry that cannot afford to delay major oil and gas projects. However, they indicated the CISAA membership as a much better match given less time-sensitivities involved in the work.

These Associations collectively represent a portal to thousands of high skilled and well-paying TFW jobs. As discovered in interviews with HKAA HR company in Edmonton, accepting an invitation to an industry event and familiarizing employers with its value-added services resulted in significant recruitment partnerships.

The Board has invited Tunisian representatives to familiarize its members with "Brand Tunisia," including the identification of Tunisian competencies beyond welding into other skilled trades.
However, this opportunity must be considered strategically and quite possibly, in a context that extends beyond the Tunisian labour market to include broader North Africa.

- For IOM in particular, more detailed information including case studies outlining the Organization's success in achieving administrative efficiencies in the processing of foreign workers into Canada is welcome. The Albertan energy industry face very real challenges to obtaining quick access to overseas TFWs; this is why a number of Americans are working as TFWs in the energy industry.

- Industry associations like CISAA, trade colleges such as the Northern Alberta Institute of Technology (NAIT) and the Albertan trade certification agency (AIT) have only recently, and very informally, initiated discussions about achieving a JIT offshore labour-force. It is important to be mindful of the fact that the status of these discussions is not as advanced as those in Saskatchewan; and importantly, the Albertan government's "hands-off" approach to immigration is a substantial impediment to advancing such discussions.
Chapter II: Manitoba
II Manitoba

1. Manitoba: Socio-Economic issues

1.1 Economic factors
Manitoban Gross Domestic Product (GDP) was $44.47 billion at the end of 2011. Real GDP growth in 2011 was approximately 2.2 per cent higher than the year previous. The survey of major economic forecasters projects Manitoba GDP to grow at 2.0 per cent in 2013 (Manitoba Ministry of the Entrepreneurship, Training and Trade, 2012). Manitoba has the second best average annual growth over the last four years (2007-2011) at 2.0 per cent, ahead of the national average of 1.0 per cent.

The Manitoban economy is one of the most diversified in Canada: GDP is derived from over ten different industries including services (24%), finance, insurance and real estate (19%), trade (15%), manufacturing (11%), construction (5%), utilities (4%), public administration (7%), transportation and warehousing (6%), agriculture (4%), arts and entertainment (3%), forestry, mining, oil and gas (3%). Major export markets for Manitoba goods are the U.S.A., China, Japan, Mexico, South Korea, U.K. and U.A.E. (Ministry of the Economy, 2012).

In 2011 the sales of wood, aerospace parts, machinery and fabricated metals led economic growth. The value of aerospace parts exceeded $1 billion in value making it the fifth largest component of shipments in 2011. Manitoba's capital investment was revised up to 1.5 per cent for 2011, to a total record $11.4 billion. Private investment increased 1.9 per cent while public capital investment increased 0.5%. In 2011, Manitoba manufacturing sales increased 6.2 per cent to $15.3 billion, then increasing another 2.4 per cent in 2012 (McNeill, 2013).

Agricultural crop production rebounded in 2012, from two years of flooding and bad weather, with increases in all crops: wheat, canola, corn for grain, soybeans and barley. In 2011, Manitoba's farm cash receipts increased to $4.9 billion. In 2011, retail sales increased 4.3 per cent and then another 2.0 per cent for 2012 on the strength of gasoline, electronics and appliances, personal care and motor vehicle sales.

1.2 Demographic factors
As of October 2012, Manitoba's population stood at 1.27 million, a one-year increase of 15,000 people or 1.2 per cent of the total population. The most significant factor driving population growth is Manitoba's Immigrant Nominee Program (MINP) for immigrants. Since this program began, immigration to Manitoba has begun to grow substantially.

Manitoba, like Saskatchewan, is struggling with the challenge of an aging workforce. Increasingly they have looked to immigration with annual intakes of Permanent Residents increasing threefold from 2003 (5,000 persons) to 2012 (15,200 persons). The government forecasts a total population of 1.5 million by 2022, an increase of almost 300,000 people in next 10 years (Manitoba Bureau of Statistics, 2012), with immigrants representing a majority of new labour market entrants.

1.3 Labour Market overview
Over the past 13 years, Manitoba's unemployment rate has averaged 2.2 percentage points below the national average. At the end of December 2012, the total employed population was 633,000 with an unemployment rate of 5.2 per cent, the third lowest behind Saskatchewan and Alberta. In January 2013, the province added 13,800 jobs and the labour force expanded by 1.8 per cent. Based on the Manitoba survey of economic forecasters, Manitoba's employment is expected to grow 1.3 per cent in 2013 (Budhia, 2012).
The services producing sector experienced a slight net loss but remained relatively stable through December 2012. Growth occurred in educational services, information, culture and recreation, and accommodation and food services. Business, building and other support services fell 6.3 per cent. Health care services and social assistance are Manitoba's largest service industry; in 2011, employment increased by 6,700 jobs to 96,800, an annual increase of 7.4 per cent.

Within the goods-producing sectors, all industries saw growth. Manufacturing is the largest good producing sector industry and employment improved to 65,000 jobs at the end of 2011. However, forecasts predict that job growth in manufacturing is not expected to pick up within next five years. Agriculture, forestry, fishing, mining, oil and gas began their anticipated recovery. Construction also fared well with housing starts remaining strong.

Manitoba has a substantial Aboriginal population, but only modest gains have been made to decrease Aboriginal unemployment, which is at least as twice as high as the provincial average. However, Manitoba has one of the lowest provincial youth unemployment rates at 11.0 per cent in 2012 (Manitoba Bureau of Statistics, 2012).

### 2. Immigration and Manitoba

#### 2.1 Overview and Key Immigration Policies

Manitoba, similar in population size to neighbouring Saskatchewan, has a priority to strengthen recruitment of foreign workers and link eligible TFWs to permanent immigration routes. The Manitoba Immigrant Nominee Program (MINP) selects people whose participation enhances economic development with specialized skills needed for Manitoba's labour market. In 2011, 15,962 immigrants were settled in Manitoba on a permanent basis (Table I). The Philippines, China and Germany consistently rank in top five immigrant source countries; and in 2011, immigration from the Philippines increased by 17 per cent.

#### Table I - Permanent Immigration to Manitoba (2002-2011)

<table>
<thead>
<tr>
<th>Year</th>
<th>Economic Migrants</th>
<th>Principal Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>3,000</td>
<td>2,500</td>
</tr>
<tr>
<td>2003</td>
<td>3,200</td>
<td>2,700</td>
</tr>
<tr>
<td>2004</td>
<td>3,500</td>
<td>3,000</td>
</tr>
<tr>
<td>2005</td>
<td>3,800</td>
<td>3,300</td>
</tr>
<tr>
<td>2006</td>
<td>4,000</td>
<td>3,500</td>
</tr>
<tr>
<td>2007</td>
<td>4,200</td>
<td>3,800</td>
</tr>
<tr>
<td>2008</td>
<td>4,500</td>
<td>4,100</td>
</tr>
<tr>
<td>2009</td>
<td>4,800</td>
<td>4,400</td>
</tr>
<tr>
<td>2010</td>
<td>5,100</td>
<td>4,700</td>
</tr>
<tr>
<td>2011</td>
<td>5,400</td>
<td>5,000</td>
</tr>
</tbody>
</table>

Economic migrants made up 82.4 per cent of total immigration numbers. Principal applicants under this category had work experience in high-demand occupations including health professionals, industrial butchers, welders, accountants, clerks and engineers (Manitoba Ministry of Labour and Immigration, 2011b). The number of foreign students entering Manitoba was 1,772 at the end of 2011. Most international students enrolled in educational institutions in the capital city of Winnipeg. Asia (42%) was the biggest source region, followed by Africa and the Middle East (24%).
Employers in Manitoba can also recruit TFWs to help address labour and skills needs in sectors where domestic recruitment efforts are unsuccessful. Manitoba is also proactive in international marketing and recruitment, though in a more prescribed way than Saskatchewan. The approach to date for Manitoba has been to develop recruitment agreements with the governments of Philippines, Ukraine and Iceland. The Province has also supported employer involvement in overseas recruitment in Germany, France and Mexico. In 2011, Manitoba received 3,228 TFWs with 41 per cent from the U.S.A. and 22 per cent from European countries (Table II). TFWs are eligible to apply to MINP for PRs after working a minimum of six months and having a guarantee of full-time employment. Manitoba advocated for stricter language requirements on TFWs, and as a result, CIC is now considering a common TFW language standard across the country.

Table II: TFWs into Manitoba over the last decade

<table>
<thead>
<tr>
<th>Year</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2650</td>
<td>2278</td>
<td>1894</td>
<td>2133</td>
<td>2405</td>
<td>2983</td>
<td>3905</td>
<td>4191</td>
<td>3638</td>
<td>3246</td>
<td>3228</td>
</tr>
</tbody>
</table>

Manitoba created an Immigration department and website that directly oversees and manages its immigration programs (www.immigratemanitoba.com). The province is recognized across Canada as having a best practice for immigration recruitment and retention. Recent studies showed 85 per cent of all immigrants who were nominated through the MINP were working after three months and 76 per cent were homeowners within five years. Moreover, the unemployment rate for newcomers is one of the lowest in Canada and Manitoba's retention rate is strong at 85 per cent (Manitoba Ministry of Labour and Immigration, 2011b).

Manitoba is widely regarded as a leader in attracting, integrating, and retaining skilled immigrants in a region that traditionally received only a small fraction of total inflows. Approximately one-third of the 36,000 nominees that arrived in Canada in 2010 came to Manitoba through the MINP. The Province's strong immigration settlement/retention model is one of the key factors as the province only accounts for four per cent of the total population and three per cent of the Canadian economy.

To ensure the protection of TFW the government implemented the *Worker Recruitment and Protection Act*. This legislation strengthens the rules governing immigration consultants and those who charge fees for immigration advice or representation. It also obliges Manitoba employers to apply first to Employment Standards to register under the Worker Recruitment and Protection Act, and to HRSDC for a LMO. The department has processed 1,758 business registration applications and has issued 1,645 Certificates of Registration.

Manitoba has the largest francophone population in western Canada. The Province welcomed 464 French-speaking immigrants in 2011, which was an eight per cent increase from 2010. The top source countries for francophone immigrants were the Democratic Republic of Congo, France, India, Morocco and Mauritius (Manitoba Ministry of Labour and Immigration, 2011b). The Province continues to work with its francophone community associations to recruit and retain francophone immigrants.

2.2 Process for Entry - Immigrating to Manitoba

There are three routes for Immigrating to Manitoba: as a TFW, through the MINP program or through one of the federal CIC categories (see Annex III). The MINP program accounted for 77 per cent of all newcomers in 2011. From this intake, applicants were chosen based on employer connections (25-30%) or international students (5-10%), but the majority (65%) was chosen as a result of social/family ties to a Manitoban community. The large percentage of candidates taken in under the social/family (65%) ties is indicative of Manitoba's human capital model of immigrant selection and underscores why Manitoba has such strong immigrant retention rates.
Manitoba believes their immigration recruitment and retention model is internationally competitive in the global competition for talent. One of Manitoba's unique incentives for principal applicants under the MINP program is the flexibility it allows for secondary applicants such as a family member. Principal applicants who immigrate successfully to Manitoba are able to bring their spouses to Manitoba who can automatically qualify for an open work permit.

3. Destination Canada

3.1 Francophone support in Manitoba

Manitoba's labour market is driven by a large number of SMEs that do not have significant HR budgets; moreover the provincial government's policy focus is on settlement in order to ensure a sustainable workforce and demographic resiliency for its smaller population. This creates an ideal environment whereby Manitoban FMCs have an opportunity to provide strong support services to newcomers in a way that provides a comparative advantage to incoming francophone labour.

The Manitoban government has partnered with ANIM, Manitoba's bilingual trade agency to expand the presence of Manitoba businesses and organizations in Francophone markets. ANIM also works to attract Francophone business people to Manitoba (Manitoba Ministry of Labour and Immigration, 2011b). ANIM has been the Manitoban focal point for participating in Destination Canada recruitment fairs, but to date ANIM has not conducted any recruitment beyond Europe.

The Manitoban francophone community made up 5.6 per cent of the total population according to the 2006 Census. The government of Manitoba plans to increase annual intake of immigrants to 20,000 by 2016. The Province's long-term goal is to increase the level of Francophone immigrants to 7 per cent of Manitoba's intake or 1,400 francophone immigrants on an annual basis (Manitoba Ministry of Labour and Immigration, 2011b). Since 1999, Manitoba attracted 2,100 French-speaking immigrants and in 2008, the province saw a 172 per cent increase in French-speaking immigrant arrivals over 1999 figures.

The government of Manitoba works closely with community partners and educational institutions to recruit international students given how substantial a source they have been to permanent immigration. The government has also partnered with Francophone community representatives in promotion and student recruitment missions in West African francophone communities. These recruitment missions have occurred in Mali, Nigeria, Morocco and Ivory Coast. North African countries should receive more interest in the coming years, especially Tunisia with its links to Destination Canada events.

In meetings with CDEM, the local association representing Manitoban francophones, it was revealed that in the last six to seven years most new arrivals have originated from west Africa with a large percentage entering as refugees. CDEM offered services such as arrival orientations, housing support services, language training, business start-up assistance and employment support. However, while they have committees and staff allocated to supporting immigration, they specialize in settlement and not international recruitment.

4. Industry: Selection of Manitoban Industry seeking Foreign Workers

4.1 Manufacturing

Manitoba's manufacturing sector is home to Canada's largest plants for furniture, doors, windows and cabinetry. It is also North America's largest producer of intercity and urban buses (Budhia, 2012). At the end of 2011, Manitoba's manufacturing sector contributed almost $5.5 billion to the provincial economy. However,
manufacturing sector output decreased at the end of 2012, with factories shipping out only $1.2 billion worth of goods for the month of December, a decline of 7.7% from December 2011. Much of this decrease was due to lower sales in the transportation equipment industry (McNeill, 2013).

Across Canada manufacturing plays a critical role in the economy directly employing over 1.85 million Canadians. It accounts for a significant percentage of employment by province, with Manitoba's manufacturing sector the third highest in the country (Table III). Manufacturers employ one in ten Canadian workers, with the business outlook for the Canadian industry positive for the next three to five years (CME, 2012b).

Table III - Manufacturing's contribution to GDP by Province.

<table>
<thead>
<tr>
<th>Province</th>
<th>Manufacturing's Contribution to GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newfoundland (NL)</td>
<td>5.1%</td>
</tr>
<tr>
<td>Prince Edward Island (PEI)</td>
<td>6.6%</td>
</tr>
<tr>
<td>Nova Scotia (NS)</td>
<td>7.1%</td>
</tr>
<tr>
<td>New Brunswick (NB)</td>
<td>8.9%</td>
</tr>
<tr>
<td>Quebec (QC)</td>
<td>13.1%</td>
</tr>
<tr>
<td>Ontario (ON)</td>
<td>12.0%</td>
</tr>
<tr>
<td>Manitoba (MB)</td>
<td>10.3%</td>
</tr>
<tr>
<td>Saskatchewan (SK)</td>
<td>6.4%</td>
</tr>
<tr>
<td>Alberta (AB)</td>
<td>7.8%</td>
</tr>
<tr>
<td>British Columbia (BC)</td>
<td>7.8%</td>
</tr>
</tbody>
</table>

The Canadian Manufacturer's and Exporters (CME) conducted a nation-wide business survey for its members, with approximately 648 companies responding. Almost fifty percent of companies stated they face labour shortages across a wide range of occupations. Occupations with critical shortages were those in skilled production, general management and general labour (Table IV). According to the CME survey, these shortages have a significant impact on manufacturing operations, including constraining growth, restricting investment and forgoing production.

Table IV - Manufacturing Labour shortages by Occupation

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Today</th>
<th>Next five years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skilled production (welders, machinists, operators)</td>
<td>50%</td>
<td>55%</td>
</tr>
<tr>
<td>General labour</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Scientists, engineers, R&amp;D technicians</td>
<td>26%</td>
<td>35%</td>
</tr>
<tr>
<td>Sales, marketing and customer service</td>
<td>23%</td>
<td>28%</td>
</tr>
<tr>
<td>Management and administration</td>
<td>18%</td>
<td>26%</td>
</tr>
<tr>
<td>Production support (IT, maintenance)</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: CME Management Issues Survey
Attracting and retaining labour ranked as the third biggest challenge with over 46 per cent of survey respondents stating it was a top concern. For Manitoban respondents the primary concern was upgrading the skills of the current labour force, with the challenge of replacing an aging workforce coming in second (CME, 2012b). To better understand how immediate the labour-force challenge is, Manitoba had the highest percentage of companies stating they experienced a labour shortage today at 55.7 per cent (CME, 2012b).

In terms of sourcing labour, most companies in Manitoba were looking internally to promote and then backfilling the more junior positions with new hires. When looking to source labour from outside the company approximately 55 per cent of all respondents used recommendations from current workers, while 51 per cent looked to employment agencies. The survey also revealed that while most companies were reducing or eliminating training programs, language training was the one program that saw an increase and will continue to increase over the next three years. This was a reflection that companies are also sourcing more workers through immigration channels, especially from countries where French and English is not the first language. Approximately 25 per cent of all survey respondents indicated they relied on foreign labour to support their workforce (CME, 2012b), despite a preference towards growing the domestic work pool. However, the reality of an aging workforce and fewer youth entering the industry and skilled trade’s professions in general means that immigration will continue to be a significant source of labour for both skilled and unskilled manufacturing jobs in order to maintain production output across Canada.

4.2 Transportation (Trucking)

There are 268,000 truck drivers in Canada, which includes both drivers in the for-hire trucking industry and those drivers engaged in private trucking. Trucking is a fragmented industry, categorized by type of carrier (for-hire, private, common versus contract), size, region, unionization and with thousands of market players. The marketplace encompasses not only Canada, but also the United States and Mexico (Canadian Trucking Alliance, 2012).

At $17 billion in annual contribution to Canada's GDP, it is by far the largest of any freight transportation modes in the country. The Conference Board of Canada's research (Vijay, G and A. Macdonald, 2013) shows that the for-hire trucking industry can expect a driver gap of 25,000 drivers (14% of the total driver population) by 2020. However, if improvement in labour productivity is lower than forecast for the 2012-2020 period, the gap could exceed 33,000 drivers (Table V).
The Canadian Trucking industry has identified a number of systemic issues that underpin the shortages - including thousands of current drivers approaching retirement and only a small fraction of young drivers taking their place; public perceptions of the industry including low wages, an unpopular lifestyle and the fact that a truck driver job is not considered a skilled occupation outside the industry (Canadian Trucking Alliance, 2012).

Trucking contributed over $1 billion to Manitoban GDP in 2012, and given its link to trade and transportation routes, it plays a crucial role in Manitoba's trade competitiveness. Manitoban exports to the US were worth $8.87 billion (2012) and almost $12.46 billion of Manitoban imports originate from the U.S. With approximately 300,000 commercial trucks crossing the Manitoban-US border each year, over 80 per cent of this bilateral trade is shipped by truck (Discussions with the Manitoba Trucking Association).

Five of Canada's top 50 carriers are based in Manitoba, with 425 for-hire trucking companies headquartered in Manitoba. The industry directly and indirectly employs 4.6 per cent of the Manitoban labour force. The current supply of drivers in Manitoba is around 15,000, and approximately 1,000 new truckers will be needed in the next few years in Manitoba. The average weekly wage for truck drivers (2011) was $910/week in Manitoba.

The Manitoban Trucking Association (MTA) indicated that its companies are struggling to attract, retain and employ long-haul truck drivers. One hope for the industry is that strong immigration levels can help relieve some of the shortages. So far, the trucking industry has looked only to Europe to bring in qualified and trained truck drivers. One of the reasons the industry has not looked beyond European immigration channels, are concerns over adequate levels of training and safety standards (Canadian Trucking Alliance, 2012).

Federal and provincial immigration programs (TFW, MINP) have tended to restrict the recruitment of immigrant truck drivers because truck driving did not qualify as a skilled occupation under the federal NOC system. The industry continues to push for changes to the federal NOC code in order to allow in more experienced truck drivers. However, they believe that until truck driving is a skilled occupation, attracting new workers (domestic or foreign) is going to be a struggle (Canadian Trucking Alliance, 2012).
In Manitoba, the MTA recently called on the Manitoban Apprenticeship and Certification Board to make an occupational designation for commercial truck driving. The MTA and its counterpart associations across Canada believe that by creating such a designation the industry can have a recognized standard to significantly boost recruitment of both domestic and foreign workers.

4.3 Construction
The Manitoban construction industry contributes approximately 5% to overall Manitoban GDP in 2011 or approximately $2.3 billion to the economy. However, the 2012 Manitoba budget scaled back its spending on major infrastructure projects, with the department of Manitoba Infrastructure and Transportation (MIT) deleting 10 projects with a value of $50 million. In addition, the province announced delays on tender advertisements for an additional 15 projects through to the end of 2012 (Manitoba Heavy Construction Association, 2013c).

On a more positive note for long-term growth and employment, the most significant infrastructure announcement in the province in recent years (2009) was the advancement of Centre Port Canada (CPC), North America's first inland port based in Winnipeg. The location of Winnipeg is strategic in that the city is ideally located to serve as a transportation gateway for the entire continent (Table VI).
CPC is a free-trade zone that serves international markets including mid-western U.S, Mexico and Latin America, as well as Europe and Asia (source: http://www.centreportcanada.ca/about-us). A trade agreement was signed in September 2012 between CPC and SinoTrans Eastern Company, China's largest transportation and Logistics Company (Manitoba Heavy Construction Association, 2012b).
The heavy construction industry in Manitoba focuses on road maintenance, sewer lines, hydro-electric plants, new highways, bridges, overpasses and construction of transportation systems - including highways, airport runways, bus lanes and subways. The CPC project has already generated $0.5 billion worth of infrastructure projects since its launch, and will continue to generate a number of long-term opportunities for the heavy construction industry. Recent infrastructure investment (2012) announcements include sewer and water service extensions, construction of a common use rail facility and Centre Port Canada Way: a $212 million four-lane divided expressway (Manitoba Heavy Construction Association, 2013c).

Typical occupations in the heavy construction industry include site superintendents, foremen, heavy equipment operators, mechanics, drivers, labourers, asphalt crews, traffic signalers, pavers, engineers, surveyors, heavy equipment dealers, accountants. In Manitoba, workers in road-building and heavy construction earn between $38,800 and $62,400. In addition, the MHCA offers year-round training and certification especially for heavy equipment operators and safety advisors.

The construction industry in Manitoba will need over 6,000 workers to replace those who are expected to retire in next 8 years. In addition, 9,000 new workers will be required to accommodate the expected rise in activity over the same time period. The industry is deeply concerned that labour scarcity will drive up wage inflation, which will increase the overall costs to the industry Manitoba Heavy Construction Association, 2011a). A number of Manitoban companies have already turned to TFWs to provide temporary relief where chronic skilled shortages exist (Manitoba Heavy Construction Association, 2011a).

Manitoban companies reported they have helped some of these workers navigate the MINP, but the current intake is still far too small to overcome the industry's long-term labour challenge. Moreover, the MHCA reports that it is having problems attracting workers. Similar to what other Associations have done, the MHCA is working closely with Apprenticeship Manitoba to designate "heavy equipment operator" and "heavy construction worker" as non-compulsory trades in the belief that this will help worker attraction and retention.

5. Strategic Considerations: Opportunities for Tunisia

5.1 Engaging the Manitoban government directly
The Manitoban government takes a very "hands-on" approach to immigration. They work in close partnership with local communities and SME-sized companies to attract immigrants, and importantly, to ensure they stay in Manitoba. The Manitoban immigration model (MINP) is considered a best practice, with 85 per cent of provincial nominees working after three months and an unemployment rate for newcomers that is one of the lowest in Canada.

Demographic challenges have meant that the government must prioritize settlement and retention of newcomers. This also complements a provincial labour market that consists primarily of SMEs. These smaller companies cannot afford high-turnovers of TFWs like their larger counterparts and they need workers who will stay. The government's criteria (see Annex III) to assess newcomers, strikes a good balance between supporting domestic industry (that is, recruiting former international students/TFWs or through overseas recruitment fairs) and analyzing the intent of the newcomer to stay long-term in Manitoba (such as by requesting a settlement plan).

Given this settlement-first approach to immigration, it is not surprising to learn that Manitoba has a preference for signing agreements with foreign governments, most notably with the Ukraine and Iceland. These agreements are typically Memorandum of Understandings (MoUs) that do not commit either government to filling a certain quota, but rather, specify the types of support that can be anticipated from both parties to the agreement. The advantages of such agreements is that it slowly introduces familiarity between the two parties.
and allows Manitoba to begin entering potential candidates at very early stages of the immigration process into its comprehensive database.

Discussions with Manitoba government officials revealed how a recruitment agreement was established with the Ukraine. First, the Ukrainian diaspora community approached the Manitoban government. The government then worked with the diaspora community in order to identify local stakeholders who are willing to participate in an overseas recruitment mission to Kyiv. Five SMEs from Manitoba participated in the recruitments, with community representatives from the Ukrainian diaspora offering assistance. Over 250 pre-identified candidates were interviewed, and over 200 candidates were invited to formally apply to the MINP program.

Similar recruitment agreements have been signed with the Philippines and Iceland. A number of European countries, including Greece and Spain, have begun to approach Immigration Manitoba about partnerships and exploratory visits to their country. The Jamaican consulate in Vancouver has also made a recent exploratory trip to Manitoba to examine how its Ministry of Labour could support Manitoba's immigration objectives.

The key challenge for Tunisia at this moment is a lack of awareness. For SMEs and the Manitoban government, this includes gaining a better understanding of the comparative advantage of Tunisian labour and crucially, the adaptability of Tunisians to new environments. Unfortunately, there were no Manitoban government officials or SMEs who participated in Destination Canada beyond Europe.

When informed of the Destination Canada (DC) partnership with Tunisia, the government of Manitoba invited Tunisian representatives to initiate discussion on a similar recruitment-type agreement. When it was mentioned that the total number of Tunisians who came to Canada since 2009 via DC was approximately 150; Manitoban officials reacted with excitement because:

   i) it demonstrated previous history and experience on the Tunisian side bringing workers into Canada; and,

   ii) the sample size of 150-200 was an ideal starting point for them (that is, it enables better research due to smaller sample size. This allows respective parties to start with smaller target population and then to gradually increase the intake).

Tunisia lacks the presence of larger diasporas like Filipino and Ukrainian community to raise this awareness. However, this is where the local francophone population can play a strong bridging role in serving as a de facto diaspora for Tunisian newcomers. In discussions with executives from Francophone settlement agencies, they signaled their strong support to play this bridging role. Moreover, this also complements Manitoban government policy that actively supports francophone communities to reach their immigration objectives (that is, to reach seven per cent of the total Manitoban population).

On the commercial side, IOM already has a MoU agreement in place with Manitoba's Maple Leaf Foods. Discussions with Maple Leaf indicated strong demand for another three hundred international workers through to 2014. An encouraging trend for Tunisia is that despite not having a substantial diaspora compared to say the Philippines, is that a growing number of SMEs in Manitoba indicated preference for a more diverse workforce. Manitoban companies were hesitant to have their employees over-represented from one particular region of the world.

5.2 Manufacturing: Palliser Furniture Co.
Manitoba's manufacturing sector is home to Canada's largest plants for furniture, doors, windows and cabinetry. Winnipeg-based Palliser furniture is a family-owned home furnishing manufacturer with international facilities in the U.S., Mexico and Indonesia. The company was established in 1944 by a Russian-
born immigrant family, the DeFehrs and is the largest manufacturing furniture company in Canada. Final sales revenue for fiscal 2010 totaled $145,000,000.

The company is a custom-order house that manufactures all types of upholstery, stationary, recliners, home theatre and comfort chairs including leather, vinyl and exclusive fabrics. Customers can choose from over 85 leather options and 200 fabrics available in numerous colours and patterns. The company has six factories across the U.S. and several factories in Mexico. The company is strategically located to not only manufacture for the North American market, but to also ensure timely delivery through shipping by land across the continent.

The company employs 3,000 workers, with 1,000 based in Winnipeg. Palliser typically hire in occupations that include general labour, production, maintenance, logistics, administration, procurement and customer service. Palliser has a strong reputation for equitable wages and benefits, a diverse and multicultural workforce and personal and professional growth opportunities for the employees. The company has always taken an active interest in hiring immigrants from a number of different Asian and African countries, and in fact, they orient their business toward immigrant workers. The company develops special programs for training new immigrant workers, including classes in language and literacy in partnership with the Manitoba government. Interviews with workers revealed starting wages of $17/hour, but most immigrants are drawn by the combination of employment and quality of life in Manitoba (Deparle, 2010).

Palliser is currently led by CEO Art DeFehr one of Manitoba's and Canada's leading champions of immigration. Mr. DeFehr was involved in the original launch of Manitoba's MINP immigrant nominee program back in the 1990s, when Manitoba could only attract 3,000 immigrants per year. He was one of the chief architect's of the program ensuring it catered to Manitoba and the Manitoban business community - including criteria that require newcomers to have a connection to the Manitoban community and recent work experience (Pitts, 2012). CEO DeFehr is still very active from a public policy sense but as a company Palliser is satisfied with their current labour-force in Winnipeg. Mr. DeFehr is open to more general discussions given his influence with the provincial government and local industry associations, but Palliser would not be seeking to extend employment opportunities to Tunisia at this time. If they did see a boost in future demand, due to their large production presence in Mexico, they would conduct recruitments from Latin America where they have "boots on the ground."

5.3 Trucking: Manitoba Trucking Association

None of the trucking companies identified (Big Freight and Transx) agreed to meet for a discussion; therefore, it was recommended IOM speak with the industry's association the Manitoba Trucking Association (MTA).

In meetings with executives from the MTA, the greatest occupational needs in their industry are drivers (that is for long haul, long distance driving), dispatchers, safety instructors and those jobs related to tractor-trailer maintenance. In terms of attracting workers to their industry, the low salary ($40,000/year), challenging lifestyle and stigma of truck driving (that is, truck driving is considered a last choice trade) were fuelling the shortages. The MTA see increasing the supply of drivers as a way to even out the competition, as a smaller supply of labour has meant some players have set unreasonable working times and salaries.

The MTA has not participated in direct overseas recruitment fairs, but confirmed many of their members had conducted international recruitments, including Big Freight, a Manitoban trucking company with its own immigration department. Manitoban companies prefer to offshore all screening, testing, and training but for those companies that cannot afford big HR/immigration departments the challenge is finding economies of scale in international recruitments. The risk of bringing in a lower-skilled TFW meant that Manitoban SMEs
were on the line for repatriation costs (that is they must pay a portion of the TFWs airfare back home) if workers did not pass critical industry tests.

Europe was the top destination given its similar training standards, but Manitoban industry has voiced criticism of European drivers including unable to handle Canadian roads in bad weather, different equipment type challenges and problems with territory. For example, a British driver expects to arrive home the same day, but this is not the case for Canadian drivers.

More than 90 per cent of long haul routes in Manitoba must cross the US-Canada border. A key challenge for Tunisia is the issue of border crossing, which means having a passport is mandatory. The seniority system is the common method for route selection, so this means newer drivers to a company are offered the toughest routes. For Tunisians who seek to be drivers in Canada, at the same time as they process their Canadian work permit, they will need to also apply (offshore) for a B1 US VISA at the U.S. embassy in Tunis. However, experience to date has shown these VISAs have been granted, especially if a Canadian work permit is already stamped in the passport.

Other direct challenges for Tunisian drivers included a lack of previous experience. Recruiters in Tunisia found many applicants were in fact bus drivers and not long haul truck drivers, which is a very different trade. Moroccan drivers were seen as having a comparative advantage that best suited Canadian industry, as many more Moroccan drivers than Tunisian had dealt with border crossings in their driving experience (discussion with Prudhomme Inc).

The MTA offers a number of training courses and they have pushed the Manitoban government to certify truck driving as a trade, which they believe will help attract workers. To address labour shortages and minimize risk to SMEs recruiting from overseas, the MTA signed a MoU with Mexico to support truck driver training on Mexican trucks. In the Philippines, they used a different model and signed a MoU to train Filipinos on Canadian equipment.

It was agreed the best entry point for Tunisia was to familiarize MTA executives on Tunisian labour and training standards, particularly in driver training and safety. The MTA welcomed a joint visit from IOM and the Tunisian Embassy, including all supporting materials. The MTA would then take this feedback and make a formal presentation to their industry Board. They indicated that even if Tunisian training qualifications do not meet Manitoban standards, they offered to share training manuals developed in-house. The next major overseas recruitments are in November: Tunisia can be part of this.

5.4 Construction: Manitoba Heavy Construction Association (MHCA)

Industry members in heavy construction also recommended IOM speak with the industry's association: the Manitoba Heavy Construction Association (MHCA).

The construction industry in Manitoba will need over 6,000 workers to replace those who are expected to retire in next 8 years. Manitoba's heavy construction industry is dominated by 10 larger companies, with all other companies at the SME size. Typical occupations in the heavy construction industry include site superintendents, heavy equipment operators, general labourers, lower-skilled highway maintenance and other surface transportation work.

The key labour challenge for the heavy construction industry in Manitoba is retention related, as many young Manitobans still prefer to work in Alberta due to higher wages. Industry members who sat on the Board of the local Winnipeg Technical College, which produces many new workers, confirmed the ongoing migration to Alberta of young workers. For Manitoban industry, this meant an increasingly small, concentrated supply of labour, which added significantly to labour costs.
The MHCA encourages its members to recruit through career fairs and they have also reached out to Aboriginal leaders to create bridges with a young and growing Aboriginal workforce. The MHCA, similar to their trucking counterparts, believes increasing training opportunities provided in construction management and designating it as a trade will support future recruitment efforts. However, TFWs in Manitoba cannot qualify for any training assistance until they become a nominee under the MINP. This finding seems to add more impetus to exploring partnerships with offshore types of training facilities, such as the Kram training centre in Tunisia.

The MHCA is not active in overseas recruitment nor have they looked at signing MoUs with foreign partners. But they confirmed their industry has already turned to TFWs to sustain their current workforce. The MHCA reported the majority of recruitments have come from Portugal and Italy. Not surprisingly, these countries were selected due to the strong support networks associated with Portuguese and Italian diasporas already in Manitoba.

An industry-wide exposition was held in April 2013, and IOM and Tunisia received an invitation to make a formal introduction to the industry. Given the short-time frame, IOM kindly declined the invitation but agreed to follow-up in partnership with the Tunisian government with a written insert about Tunisian labour in the MHCA's next bi-monthly newsletter publication.

### 6. Recommendations

**Short to Medium-term**

- In coordination with the national RDEE body in Ottawa, follow-up directly with the local FMC association in Winnipeg (CDEM) who have a strong history of supporting African francophone immigration and who have expressed support in providing on-arrival assistance to incoming TFWs from Tunisia.

- Explore the feasibility of and encourage, the Manitoba bilingual trade agency, ANIM, to conduct Destination Canada recruitments beyond Europe into Tunisia for November 2013. Given the critical role to be played by Immigration Manitoba and CDEM, ANETI and ATCT could work through the Canadian embassy to encourage these two stakeholders to participate in DC events in Tunis in November 2013.

- Prepare a short presentation for the Board of the Manitoba Trucking Association on the strengths of the Tunisian labour-force, particularly as it relates to drivers. The MTA has direct access to numerous companies and signaled they would like to include Tunisia on their next round of international recruitments.

- Third-party recruiters such as Prudhomme International Inc, which have conducted recruitments for Tunisian truck drivers should be contacted by the Tunisian embassy in Canada to share their findings in order to improve the selection process. Interviews with Prudhomme revealed many Tunisian candidates for truck driving were in fact bus drivers and on the critical issue of border crossing, Moroccan truck drivers had more experience.

- ANETI and ATCT should approach the Canadian and American embassies in Tunis to explore complementary VISA processes for Tunisian truck drivers that have already been approved to work in Canada; given these drivers cannot work for a majority of Canadian trucking companies until they receive an American B1 US VISA.
Prepare a one-to-two page insert for the next bi-monthly publication of the Manitoba Heavy Construction Association newsletter which is sent out to all SME members; this should highlight the Tunisian Brand, and outline the skill-sets available in construction related trades.

ANETI and ATCT, through the Canadian embassy, could identify key Canadian companies in Tunisia that have trained and hired Tunisians for similar positions in order to deepen their understanding of candidate selection criteria used by Canadian companies.

Medium to Long-term

Through the Tunisian embassy in Ottawa, initiate discussions directly with officials from Immigration Manitoba who have signaled their interest in exploring the feasibility of signing a MoU given Tunisia's Destination Canada links and the complementary support that could be provided from local francophone associations such as CDEM.

Given some of the countries that have established labour agreements with the province of Manitoba (such as the Philippines and Ukraine), the GoT could leverage its international networks to learn more about the itemized arrangements of these agreements.

Importantly, an increasing number of Manitoban companies have signaled a growing preference for a more diverse workforce and are willing to support TFWs on issues such as language training.
Chapter III: Saskatchewan
III Saskatchewan

1. Saskatchewan: Socio-Economic issues

1.1 Economic factors
Saskatchewan's Gross Domestic Product (GDP) was $57.5 billion at the end of 2011. This was a 4.9 per cent increase compared to 2010. The Province continued its strong economic growth in 2012, posting a GDP growth rate of 3.0 per cent. The province's growth rate is expected to be among the country's highest again for 2013 at 3.4 per cent. Looking forward into 2014, GDP growth is predicted to remain strong at 3.7% (Ferley, 2013). Saskatchewan has a substantial and diverse resource base: potash, uranium, oil, gas, diamonds, forests and agricultural land which all drive economic growth. Saskatchewan also has a well-established manufacturing and service sector. Increasingly it is considered one of the strongest economies in North America.

Manufacturing shipments for the Province totaled $14.0 billion in 2012, but Potash production decreased by 15.0 per cent to 8.8 million tonnes. Oil production in Saskatchewan increased by 9.3 per cent to 27.3M cubic metres, while production of natural gas decreased by 8.6 per cent to 5.6B cubic metres. However, uranium production in 2012 increased by 12 per cent and capital investment in Saskatchewan increased by 6.5 per cent to a record level of $20.9 billion, with another $20.5 billion in capital investment expected for 2013 (Saskatchewan Ministry of the Economy, 2013). Investment in non-residential construction totaled $1.8 billion for 2012, an increase of 18.7 per cent from the previous year.

Despite some minor decreases in Saskatchewan's resource extraction industries, oil and gas production still hit record levels in 2012 (HRSDC, 2013a). Potash and uranium production levels will ramp up in 2013 to meet anticipated strong demand from India and China, particularly with the government of Canada's recent signing of a uranium agreement with India.

1.2 Demographic factors
With a current population just under 1.1 million, approximately 35 per cent of Saskatchewan is over the age of fifty. As part of the response to an aging workforce, the government of Saskatchewan launched "Saskatchewan's Plan for Growth" that calls for increasing the total population to 1.2 million by 2020. Using historic growth as a model, Saskatchewan's labour force will require an additional 120,000 workers by 2020 or an average of 10,000 new workers per year on average (Saskatchewan Labour Market Commission, 2009). These new workers include the future domestic labour-force (school leavers, inter-provincial migrants) and foreign workers/immigrants.

The government's plan to ensure a resilient demographic base is on-track: Among the 28 metropolitan areas in Canada, the Saskatchewan cities of Saskatoon and Regina ranked first and second for annual population growth in 2012 (Saskatchewan Trends Monitor, 2013).

1.3 Labour Market overview
In January 2013 Saskatchewan recorded the highest level of employment according to a provincial labour force survey. Total employment stood at 545,300 up by 4.7 per cent or 24,700, compared to January 2012. This increase was in both full-time and part-time jobs. The unemployment rate fell to 4.1 per cent in January 2013 and is considered by economists to represent full employment (Saskatchewan Trends Monitor, 2013).

These unemployment figures represent a remarkable transformation from pre-2007 levels, when Saskatchewan experienced a net loss of 46,000 workers due to interprovincial migration. Much of these workers left to find
work in prosperous Alberta (Saskatchewan Labour Market Commission, 2009) but a growing number of Saskatchewan employers are now attracting workers that until recently might have been drawn to higher wages in Alberta.

Agricultural employment increased by 8,000, and non-agricultural employment was up by 16,700 in January 2013, compared to January 2012. New jobs were added in manufacturing (700), construction (8,300), retail and wholesale trade (600), services (4,900), public administration (1,900) and resource industries (2,500). Employment was lower in transportation, warehousing and utilities (-1700) finance, insurance and real estate (-500), compared to the year before (HRSDC, 2013a)

While Saskatchewan's provincial unemployment rate was 4.1 per cent, Saskatchewan's youth unemployment rate was 8.9 per cent in January 2013, the same level as it was in January 2012. Saskatchewan's significant Aboriginal population recorded a 13 per cent unemployment rate, down from 16 per cent in 2013. Youth and Aboriginal workers represent an underutilized labour supply, but so far this labour supply has not been able to address the resulting skills shortages in the Province.

2. Immigration and Saskatchewan

2.1 Overview and Key Immigration Policy

In 2001, there were fewer than 50,000 immigrants living in Saskatchewan whom had arrived in the Province from outside Canada. Before 1991, the majority of immigrants originated from European countries. But this trend has begun to shift towards the end of 2010 with 42 per cent of immigrants coming from Asian countries (mostly China and the Philippines), the United States (11%), the former Yugoslavia (9%) and South Africa (4%) (Saskatchewan Labour Market Commission, 2009).

The government of Saskatchewan recognizes that Toronto, Montreal and Vancouver have been the traditional destination for immigrant to Canada. To attract and importantly retain new immigrants, the Province has developed a marketing strategy to help "brand" Saskatchewan at out of Province and overseas job fairs (Saskatchewan Labour Market Commission, 2009). At the time of writing, the government of Saskatchewan was leading two overseas missions with industry: one to Ireland and the other to Tunisia (March 2013).

The Province has dedicated a full department to Immigration, and set-up a website to facilitate new arrivals into the Province (www.saskimmigrationcanada.ca). The department of immigration focuses on the attraction and settlement of newcomers to the Province, primarily through the Saskatchewan Immigrant Nominee Program (SINP) that provides a streamlined process for entry. Given the ongoing demographic challenge facing Saskatchewan, the government's priority is to support those immigrants who wish to remain long-term in the Province. The provincial government focus for immigration is therefore on long-term settlement as opposed to short-term use of temporary foreign workers.

In 2011-2012 the government nominated 4,072 immigrants for Permanent Residency under the Province's core immigration program: the SINP. These nominations were for principal applicants, who are then allowed to nominate family members and other secondary applicants. The government believes these nominations will result in another 11,000 to 12,000 newcomers settling into the province by the end of 2013(Table I). The top three source countries for newcomers in 2012 were India, Philippines and China. The main destinations were Regina, Saskatoon and Prince Albert (Ministry of Immigration, 2011).
Table I - Saskatchewan PR arrivals: Historical and Projected

Employers and government officials report that there is a preference to recruit semi-to-high skilled TFWs as they were more likely to become PRs and thus help to grow the population. However, many employers in the Province still rely on TFWs to support their labour-force, with the government strategy to transition these workers into permanent residents. Indeed, the government reported approximately 80 per cent of all TFWs transitioned to PRs through the PNP.

To combat the growing problem of immigration fraud and exploitation of immigrants by immigration agencies, the Province finished consultations around its plans to launch legislation to protect immigrant applicants and foreign workers during the recruitment and immigration process (Ministry of Immigration, 2011).

The other key mandate for the Ministry of Immigration is foreign credential processing, especially important given the demand for high skilled workers in the trades. The department works with the federal government on credential recognition and at the provincial level through the department's recognized prior learning coordination group that works closely with regulatory bodies and educational institutions, to support the recognition of international training and experience that immigrants bring to Saskatchewan.

The Saskatchewan Apprenticeship and Trade Certification Commission (SATCC) is the mandated agency that either approves or rejects the credentials of foreign workers. The SATCC operates on a very small staff (2-3 FTEs). Once they receive an application, it typically takes between four to six weeks to process all the paperwork. The total volume of international applications received on annual basis is limited: in the 2011-2012 year they processed 208 applications with over 1,900 credentials assessed. Applicants then receive a yes/no response with a letter of explanation. If successful, this letter can be used for immigration purposes, but only if the candidate has a job offer with a Saskatchewan employer.

The Commission works on an impartial basis and their mandate is to seek equivalency. This means the credentials of foreign workers are assessed and held to the same standard as that of a Saskatchewan worker. Interviews with the SATCC revealed that the Saskatchewan credential recognition process revolved around:
i) **Compulsory trades** of which there are four\(^6\) in Saskatchewan (such as an electrician). The commission requires transcripts, employer verification of experience and proof of education/training. Compulsory trades require a minimum of 7,200 hours experience;

ii) **Regulated trades** (such as a hairstylist). These trades require a formal certificate of training before commencing employment; and,

iii) **Voluntary trades** (such as an automotive technician). In these trades an employer is permitted to hire a worker directly and no formal certification is required.

### 2.2 Process for Entry - Immigrating to Saskatchewan

There are three distinct routes for immigrating to Saskatchewan: as a TFW, through the SINP or through one of the federal CIC categories (see Annex III). To come to Saskatchewan under the SINP program, an immigrant must have certain skills, education and work experience to match Saskatchewan's economic needs. But most importantly, newcomers must be willing to make Saskatchewan their new home.

The eight priority categories for Saskatchewan under the SINP include skilled workers, entrepreneurs/group of employers, family referral, farmers, health professions, hospitality sector, long haul truck drivers and students. For example, the hospitality sector category allows employers to nominate foreign workers for a temporary work permit issued by CIC, supported by a LMO, and in one of the following categories: food/beverage server (NOC 6453), food counter attendant (NOC 6641) and housekeeper/cleaning staff (NOC 6661). Most of Saskatchewan's categories required immigration candidates to possess a job offer from a Saskatchewan employer. This complements the overseas marketing and recruitment missions conducted by the government.

### 3. Destination Canada

#### 3.1 Francophone support in Saskatchewan

Saskatchewan's labour market is driven by a large number of SMEs that do not have significant HR budgets; moreover the provincial government's policy focus is on settlement in order to ensure a sustainable workforce and demographic resiliency for its smaller population. This creates an ideal environment whereby Saskatchewan FMCs have an opportunity to provide strong support services to newcomers in a way that could provide a comparative advantage to incoming francophone labour.

The Saskatchewan government was represented at Destination Canada in Tunisia by a Director-level official (Ms. Richelle Bourdoin) who has since returned to Tunis in March 2013, leading a delegation of approximately eight to ten SME employers from Saskatchewan. Saskatchewan industry was represented at Destination Canada in Tunisia by third-party HR firm Prudhomme International (PI) Inc. and its President Mr. Denis Prudhomme. PI Inc. looked to recruit as many as 60 Tunisian candidates in skilled trades type positions including truck drivers, heavy-duty technicians, welders, painters and sand blasters. Recent discussions with PI Inc. revealed that Mr. Prudhomme returned to Tunisia in February 2013, to conduct additional recruitments in very similar types of occupations.

The only FMC representative in Canada to attend the Destination Canada event in Tunisia was the Director of Assemblée communautaire frankosaskoise (ACF) in Regina (Mr. Ronald Labreque). This was a first visit to Tunisia for Mr. Labreque who conducted several recruitments for his members (including positions of Electricians, Carpenters, Cooks, Educators). It was also a first opportunity for him to assess the strengths of the

\(^{6}\) Each Province has its own trades related credential recognition system. While Saskatchewan only has four occupations classified as "compulsory trades," there are 37 in the province of Alberta.
Tunisian labour force, and to investigate bridge building opportunities between the ACF community and Tunisia.

During meetings with ACF in Regina, Mr. Labreque communicated that he had a very positive experience in Tunisia, including in-depth discussions with the ANETI job agency on the issue of recruitment. The ACF sees the most demand from its community in the manufacturing industry, particularly in welding and mechanics. ACF was open to the possibility of receiving a Tunisian delegation later in the year, and they were ready to support local Saskatchewan industry by receiving francophone newcomers.

The population of francophones in Saskatchewan is small at around 22,000. The francophone community is primarily found in and around large metropolitan areas such as Saskatoon and Regina. FMC support agencies like the ACF receive federal and provincial funds to offer newcomers settlement support, language training and other important programs for newcomers. Unlike Manitoba, while their focus and funding is clearly more on providing settlement services, the ACF is quite active in recruitment: including advertising jobs in French on their website and participating in Destination Canada. Thanks to support from the department of CIC, ACF hosted a two-day province-wide immigration forum for francophone service agencies in March 2013.

4. Industry: Selection of Saskatchewan Industry seeking Foreign Workers

4.1 Construction

Construction is split into four categories of work in Canada, including New Home Building and Renovation (Residential); heavy industrial (the construction of large industrial projects); institutional and commercial (shopping malls, office buildings) and civil engineering (highways, dams, sewer lines, bridges).

Construction related activities for all four categories contributed approximately $13 billion in 2011 to the provincial economy (Construction Sector Council of Canada, 2012a). However, there was an unexpected drop in overall capital spending in the province of 2.0 per cent in 2013 after gains of 6.5 per cent and 11.9 per cent in 2012 and 2011, respectively. Much of this capital spending reduction was a result of potash producers becoming more cautious in the face of production cutbacks. Overall spending on construction will remain modest in 2013, rising only 1.5 per cent after an expected 4.5 per cent rise in 2012. However, economists forecast construction spending to rise again by 5.5 per cent in 2014 (Ferley, 2013).

Since 2001, the Saskatchewan construction industry has expanded by 70 per cent. The 2009 recession had a limited impact on Saskatchewan's construction industry, which still showed strong growth in 2010 and 2011. These gains even surpassed construction growth in Alberta. Industrial projects in the high profile mining, oil and gas and utilities contributed to the most growth, followed by gains in commercial and institutional building and residential construction.

This growth has placed a heavy burden on labour markets, and recruiting has been difficult. This situation is anticipated to persist through to at least 2015 with ongoing challenges to keep this new, large and skilled workforce in Saskatchewan due to labour demands for projects in other Provinces (Construction Sector Council of Canada, 2012a). Through the 2020 period, an estimated 6,600 workers will retire putting more pressure on the labour market.

Employment in residential work will remain at or near current levels through to 2020; with moderate volatility in new housing construction offset by steady gains in renovation and maintenance work. Non-residential construction employment will peak in 2013 and will remain close to these levels through 2020. Among non-residential construction projects, the most volatile employment patterns will occur in large engineering and industrial projects, while commercial and institutional construction experiences a more gradual demand for labour (Construction Sector Council of Canada, 2012a). Table II provides an overview through 2020 of those
construction related occupations that will continue to experience the most demand (e.g., Boilermakers, Carpenters, Truck Drivers and Welders).

Table II - Labour Market demand through 2020 (Construction Sector Council)

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<th>MARKET RANKINGS</th>
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<tbody>
<tr>
<td>1. Workers meeting employer qualifications are available in local markets to meet an increase in demand at the current offered rate of compensation and other factors currently working conditions. Excess supply is apparent and there is a risk of losing workers to other markets.</td>
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<tr>
<td>2. Workers meeting employer qualifications are available in local or adjacent markets to meet an increase in demand at the current offered rate of compensation and other working conditions.</td>
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<tr>
<td>3. The availability of workers meeting employer qualifications in the local market may be limited by large projects, plant shutdowns or other short-term increases in demand. Similar or weaker conditions exist in adjacent markets so that mobility is an option. Employers may need to compete to attract needed workers. Established patterns of recruiting and mobility are sufficient to meet job requirements.</td>
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<tr>
<td>4. Workers meeting employer qualifications are generally not available in local or adjacent markets to meet any increase. Employers will need to compete to attract additional workers. Recruiting and mobility may extend beyond traditional sources and practices.</td>
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<tr>
<td>5. Needed workers meeting employer qualifications are not available in local or adjacent markets to meet current demand so that projects or production may be delayed or deferred. There is excess demand, competition is intense and recruiting reaches to remote markets.</td>
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<tr>
<td>Boilermakers</td>
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<td>Employment requirements related to industrial and engineering projects continue to build to peak levels in 2012. Conditions return to balance by 2013 as known major projects begin to wind down. Employment is exclusively in non-residential construction. The age profile for this trade is about average. New entrants into the labour force are estimated to meet replacement demand requirements, but workers from outside the local market will be required to meet expansion demand requirements early in the scenario period.</td>
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| Carpenters             | 4    | 4    | 4    | 3    | 3    | 3    | 3    | 3    | 3    | 3    |
| Employment requirements related to industrial and non-residential buildings continue to build to peak levels in 2013. Employment is divided between residential and non-residential construction. A potential for mobility between these sectors may help to meet market requirements. The age profile for this trade is about average. New entrants into the labour force are estimated to meet replacement demand requirements, but workers from outside the local market will be required to meet expansion demand requirements early in the scenario period. Workers from outside the local market leave as known projects wind down, returning conditions to balance across the remainder of the scenario period. |

| Truck drivers          | 4    | 4    | 4    | 3    | 3    | 3    | 3    | 3    | 3    | 3    |
| Employment demand related to industrial and resource-based projects continues to tighten market conditions to 2013. Employment is concentrated in non-residential construction. The age profile for this trade is about average. New entrants into the labour force are estimated to meet replacement demand requirements, but workers from outside the local market will be required to meet expansion demand requirements early in the scenario period. Workers from outside the local market leave as known projects wind down, returning conditions to balance across the remainder of the scenario period. |

| Welders and related machine operators | 4    | 4    | 4    | 3    | 3    | 3    | 3    | 3    | 3    | 3    |
| Employment requirements related to industrial and resource-based projects continue to build to peak levels in 2013. Employment is concentrated in non-residential construction. The age profile for this group is significantly younger than average. New entrants into the labour force are estimated to meet replacement demand requirements, but workers from outside the local market may be required to meet expansion demand requirements early in the scenario period. Workers from outside the local market leave as known projects wind down, returning conditions to balance across the remainder of the scenario period. |

There are 1,400 construction companies in Saskatchewan, with 1,000 under ten employees. As construction demand continues, Saskatchewan employers will continue to look outside the province for skilled workers. Migration (inter-provincial and new immigrants) into the province has risen steadily since 2002 and has been a key source of construction workers for the industry. The Saskatchewan Construction Association (SCA) receives requests every week from members for help finding workers, but they acknowledged that 90 per cent
of their members do not have immigration and recruitment awareness, so they simply make requests to local
HR firms (such as to Prudhomme Inc. based in Regina).

4.2 Manufacturing - Agricultural Equipment
Manufacturing shipments in Saskatchewan totaled $14.0 billion in 2012, despite much lower production output
in the potash industry for the year. The Potash industry has helped drive manufacturing output due to capital
expansion projects. Manufacturing shipments totaled $12.6 billion in 2011, which was an increase of 15.2 per
cent from 2010 levels. The industry is quite diverse with key products including food, machinery, fabricated
and primary metal products, transportation equipment and wood products.

Saskatchewan manufacturers are recognized as world leaders in precision dry-land farming technology, Canadian light source cutting edge technology for micro-electrical-mechanical and advanced materials coatings and finishes (Summach, 2012b). A wide range of manufactured goods are produced, the majority of which are exported out of the Province to markets around the world - including agricultural equipment, mining and industrial equipment, satellite and landline communications technologies, telecommunications, satellite, military and aviation products.

The total manufacturing industry workforce in Saskatchewan consists of approximately 30,000 employees. A
total of 16,000 workers are employed in manufacturing of machinery, transportation and industrial equipment, representing one-third of the total manufacturing shipment output (Summach, 2012b). The industry includes a diverse range of 300 companies in this specific sector.

Saskatchewan produced farm equipment can be found in most major foreign markets, including the U.S.A, Australia, Mexico, South America, Middle East and Africa and eastern and western Europe. Nearly 40 per cent of western Canada's 11,000 farm and ranch associated manufacturing jobs are based in Saskatchewan (Summach, 2012a). Agricultural equipment manufacturers in Saskatchewan have access within one-day's drive to 250,000 different farm businesses. Saskatchewan manufacturers are Original Equipment Manufacturers (O.E.M.) suppliers to John Deere, Case New Holland and AGCO Corporation.

The government of Saskatchewan conducted a labour market survey (June 2009) with companies in the manufacturing industry. Given the survey was conducted during the financial crisis, many of the labour shortages identified here will have increased substantially given the Province's accelerated economic growth beginning in 2010. Even during the financial crisis, almost 40 per cent of survey respondents were experiencing shortages of specific skills and general labour that was a constraint to company growth.

The labour market survey looked at occupations in the Canadian NOC system and collected data for eight positions to reflect the Saskatchewan manufacturing industry (Table III). Back in June 2009, despite the financial crisis, there was a range of vacancies from 6 per cent to 20 per cent. Almost one-half of these companies anticipated retirements in these occupations, with the highest levels being Supervisors, Other Products Manufacturing and Assembly, Welders and Related Machine Operators.
On specific recruitment strategies, the most common method was word-of-mouth referrals (35%), followed by on-line job postings (24.8%). More than 50 per cent of all survey respondents indicated satisfaction with international recruitments from other countries, and considered the method very effective for their workforce (Saskatchewan Labour Market Commission, 2009). Within the Saskatchewan manufacturing industry, 20 per cent of current companies were currently using or had used foreign workers in the last 12 months (for the year 2008 through 2009). In terms of retention, businesses with 20 or more workers have used competitive pay and benefits and bonus/reward systems, compared to those businesses with five or fewer employees.

4.3 Health Care

Saskatchewan population figures over the past 20 years show cities, the northern regions and First Nation (FN) communities increasing in population while smaller towns, villages and rural communities experience declining populations. Much of this has been due to an increase in migration from rural to urban areas. For planning purposes, this pattern will influence the types and locations of healthcare services in the Province. From a population demographic perspective, the 65 years and older population is forecast to increase by 24.2 per cent by 2021, while the 75 years and older population is forecast to increase by one per cent. For the younger age demographic, the population for those younger than 20 years of age is forecast to grow by only four per cent by 2021 (Saskatchewan Ministry of Health, 2012).

The province of Saskatchewan (including all urban and rural health regions and the Saskatchewan Cancer agency) employed 30,000 full-time equivalents (FTEs) in the health sector in 2012-2013. The province has more health care providers per 100,000 people than any of the other western Provinces. The workforce was 87 per cent female, with the largest number of FTEs found in the 50-54 age group (Saskatchewan Ministry of Health, 2012), followed by 21 per cent of all FTEs found in the 55-64 age group.

Saskatchewan will need to replenish almost half of its healthcare workforce in the next ten years if the demand for providers, retirement rates and historical turnover continue (Table IV). Health professions most impacted by the increased demand, retirements and attritions include nurses (RNs, NPs), home care-special care aides

Table III - Key Manufacturing Occupations and Projected Vacancy Rates (2009)

<table>
<thead>
<tr>
<th>Occupation (NOC Code)</th>
<th>Current Conditions</th>
<th>Expected Conditions (12 months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing Managers (0911)</td>
<td>3.4</td>
<td>3.7</td>
</tr>
<tr>
<td>Receptionists and Switchboard Operators (1414)</td>
<td>4.9</td>
<td>4.7</td>
</tr>
<tr>
<td>Production Clerks (1473)</td>
<td>3.9</td>
<td>4.2</td>
</tr>
<tr>
<td>Welders and Related Machine Operators (NOC 7265)</td>
<td>3.7</td>
<td>3.9</td>
</tr>
<tr>
<td>Supervisors, Other Products Manufacturing and Assembly (9227)</td>
<td>3.6</td>
<td>3.9</td>
</tr>
<tr>
<td>Metalworking Machine Operators (9514)</td>
<td>3.5</td>
<td>3.7</td>
</tr>
<tr>
<td>Labourers in Metal Fabrication (9612)</td>
<td>4.2</td>
<td>4.3</td>
</tr>
<tr>
<td>Other Labourers in Processing, Manufacturing and Utilities (9616)</td>
<td>3.9</td>
<td>4.0</td>
</tr>
</tbody>
</table>
(SCA), medical laboratory technologists, occupational therapists, public health inspectors. The total number of new nurses required in the next ten years is well over 4,000.

Table IV - Health Care Occupations Forecast: 2012-2022

<table>
<thead>
<tr>
<th>Profession</th>
<th>Current FTE Workforce April 09-March 10</th>
<th>Demand Factor</th>
<th>Increased Demand in 10 Years</th>
<th>Projected Workforce Size in 2020</th>
<th>Projected # of FTEs to be Recruited Over 10 Years</th>
<th>Projected # of FTEs to be Recruited By 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nursing</td>
<td>6,842</td>
<td>See note 6</td>
<td>822</td>
<td>7,664</td>
<td>2,548</td>
<td>3,370</td>
</tr>
<tr>
<td>Home Care/SCA</td>
<td>5,651</td>
<td>See note 7</td>
<td>387</td>
<td>6,038</td>
<td>2,133</td>
<td>2,520</td>
</tr>
<tr>
<td>LPN</td>
<td>1,865</td>
<td>See note 7</td>
<td>180</td>
<td>2,045</td>
<td>751</td>
<td>931</td>
</tr>
<tr>
<td>Medical Lab Tech</td>
<td>540</td>
<td>Population growth (7.44%)</td>
<td>62</td>
<td>602</td>
<td>191</td>
<td>253</td>
</tr>
<tr>
<td>Addictions Counsellor</td>
<td>233</td>
<td>Population growth</td>
<td>17</td>
<td>250</td>
<td>132</td>
<td>149</td>
</tr>
<tr>
<td>Occupational Therapist</td>
<td>146</td>
<td>Growth in surgery (15.6%)</td>
<td>23</td>
<td>169</td>
<td>37</td>
<td>60</td>
</tr>
<tr>
<td>Respiratory Therapist</td>
<td>103</td>
<td>Hospital days (11.4%)</td>
<td>12</td>
<td>115</td>
<td>49</td>
<td>61</td>
</tr>
<tr>
<td>Audiologist &amp; SLP</td>
<td>87</td>
<td>0-19 population growth (4.02%)</td>
<td>9</td>
<td>96</td>
<td>34</td>
<td>43</td>
</tr>
<tr>
<td>Public Health Inspector</td>
<td>72</td>
<td>Population growth</td>
<td>5</td>
<td>77</td>
<td>32</td>
<td>37</td>
</tr>
</tbody>
</table>

Everything revolves around standards in the Saskatchewan healthcare industry. International candidates interested in applying for any occupational category must therefore first be assessed by SATCC. Taking a closer look at the home-care/SCA occupation for 2010-2011 shows there were 5,642 FTEs. The forecasting scenario (2013) shows this occupation will undergo workforce growth of 3.4 per cent over five years and 6.8 per cent over a ten-year time frame. After factoring in job losses due to turnover and retirement, the total number of new FTEs required on a 10-year forecast model is 2,545 (Saskatchewan Ministry of Health, 2012).

A closer look at a typical healthcare occupation (Physician) reveals some interesting findings about international recruitment patterns in Saskatchewan's healthcare industry. Saskatchewan relies more heavily on foreign-trained doctors than any other jurisdiction in the country. The Province has long depended on internationally educated physicians to meet its medical human resource needs. In 2010-2011, 53 per cent of family physicians in Saskatchewan graduated from a medical school in Africa or Asia. In rural areas 75 per cent of physicians are trained in other countries (Saskatchewan Ministry of Health, 2012).

The recruitment situation has become so critical in Saskatchewan's healthcare industry the Province established a new agency: the Saskatchewan Physician Recruitment Agency (Saskatchewan Ministry of Health, 2012). In addition, other critical health industry occupations in short-supply including home-care/SCA aides and
occupational therapists have resulted in the Ministry of Health, Ministry of Employment and Immigration, Saskatchewan Apprenticeship and Trade Certification Commission, employers and local universities coming together to develop strategies for recruitment attraction and retention.

5. Strategic Considerations: Opportunities for Tunisia

5.1 Construction: Coram Construction Inc.

The Saskatchewan construction industry is struggling to keep up with economic growth in the Province. From January 2012 to January 2013, over 8,000 new jobs were created in the industry. SMEs in the Province reported continued optimism towards new growth opportunities at the end of February 2013, with the shortage of skilled labour reported as the main operating challenge to Saskatchewan SMEs (Chaubin, 2013).

Meetings held with the Saskatchewan Construction Association (SCA) revealed that almost all companies in the Province sustain their current operations through the recruitment of foreign workers. The majority of foreign workers in their industry are recruited from Ireland, the United Kingdom, Poland or the Philippines. One of the key reasons their industry continues returning to these countries is the trust and confidence they now have in the work ethic of these employees.

Despite surging economic growth, the province is still small enough that most local companies are able to source workers for projects. But the recurring struggle is the duration of time required to bring in TFWs. The industry is time-sensitive whereby a company might suddenly need 100 workers to begin with one-day's notice. As a result, almost every company attempts to retain their workforce and keep a supply of labour on-hand despite the inconsistent nature of project-by-project type work.

Coram Construction is a SME-sized company working on a number of large infrastructure projects across the province and western Canada. Coram opened offices in Regina and Saskatoon in 1992, and since this time continue to provide skilled trades people to the commercial construction industry (www.coram.ca). Coram focuses on projects such as hospitals, stadiums, bridges, high-rise towers and condominiums. Typical occupations include general labourers, concrete finishers, crane operators and carpenters.

Their workforce size changes depending on the number of projects in their portfolio, but interviews with the District Manager revealed the company needs another 500-600 workers by 2014. He also confirmed that another five of his major competitors had a similar future demand for workers. Due to the long-term recruitment challenge, Coram now has a positive multi-year history of international recruitment, mostly from the UK, Ireland and Poland. As a result, the company has received "accelerated LMO status" from the federal government, which means before they travel overseas to secure final recruitments Coram have already completed a key component of the administrative process to recruit foreign workers.

The winter period (December-March) is the main hiring period due to the slow-down in major construction projects, with the peak labour demand in the spring and summer seasons. Coram relies on a third-party HR company to identify the overseas pool of workers. They conduct preliminary interviews via Skype, then fly out to the source country (for example, Ireland), set-up a series of interviews and then present international candidates with job offers.

The total cost per international hire is easily in the range of $5,000 to $8,000 (the bulk of this total cost comes from the commission to HR company, Coram's international travel costs and administration). This high cost of international recruitment is expensive, and Coram signaled their interest in looking for new pools of labour that might help to bring this cost down.

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7 As they are a private company, annual sales figures were not released.
Two challenges for Tunisian labour were apparent during discussions with Coram. The company has traditionally focused on English-speaking countries because language ability is critical to ensuring a functioning workplace, in that workers must be able to interpret blueprints and read signs and also to ensuring a safe workplace, including advising fellow workers if a safety issue is observed. Another stipulation for Coram is that they require all their foreign workers to have funds of at least $10,000, to ensure they have enough for secure accommodation and to lease a vehicle to travel to remote job sites. This level of start-up capital will be difficult for some foreign workers to achieve.

Coram has an excellent relationship with the government of Saskatchewan, and the company has participated over the last two years in Saskatchewan government-led overseas job fairs. The majority of these have taken place in Europe, particularly the United Kingdom and Ireland. The District Manager commented that this support was critical to their enterprise as such job fairs built up valuable intelligence on foreign labour markets and introduced them to new pools of workers. Coram was invited on the government delegation travelling to Tunisia (March 2013), but due to internal health reasons they had to decline this year.

European-based workers in the company also had two distinct advantages. Given the high-start up capital required and the difficulty of the first two months transition, many of their current foreign workers could rely on strong support from the diaspora community associations including airport pick-up and temporary settlement support for the first few weeks. However, Coram believed that for Tunisian labourers the francophone community associations could play such a role.

In addition, certain OECD countries such as Ireland receive "port of entry" exemptions when their workers arrive in Canada. This means that instead of Irish workers processing work permits at a Canadian embassy abroad, they simply travel to Canada and receive their work permit stamp at port of entry: either an airport, border crossing or port terminal. For Tunisian workers this option is not available; however, Tunisians can compete with OECD countries thanks to Saskatchewan employers growing awareness of faster-processing times of Tunisian workers associated with the Destination Canada program.

5.2 Manufacturing
Manufacturing revenues totaled $14 billion in Saskatchewan in 2012, despite a decline in capital projects associated with the Potash industry. The total workforce in the province includes 30,000 employees, with a range of 300 different companies in the machinery and agro-manufacturing sector. Labour market surveys indicated a growing majority of these companies have used foreign labour and will continue to do so over the coming years. Two SME-sized businesses were interviewed.

5.2a. Meridian Manufacturing Inc.
Meridian has been operating for over 65 years serving the agricultural, industrial and oil and gas industries. Recently, they merged with Winnipeg-based WGI Westman Group Inc in Manitoba. The company's signature product is the production of steel hopper bins (i.e., a grain elevator) with strong demand from the agriculture industry and commercial bulk storage. They also design petroleum and oilfield tanks and cement storage containers (www.meridianmfg.com). Based out of Saskatchewan, the company owns over 56,000 square metres of production space including additional facilities in Alberta and Iowa, USA. Final sales figure for 2012 were not available, but the company's year over year average income was $5 million (Gross Income).

The company employs over 1,000 employees, with approximately 80 employees in their Regina-based shop. Following the recent merger with WGI in Manitoba, they are now in the implementation stage of their business, which means they have not fully ramped up to maximum labour capacity. Interviews with the HR department
revealed a need to recruit at least 30 more workers in the next six months. They are recruiting for positions such as welders, fabricators (press, brake and sheer) and heavy-duty equipment operators.

Meridian has been very active on international recruitments, and the company outsources to a British Columbia (BC)-based HR firm to conduct these international recruitments. However, the major challenge for Meridian is that because the HR firm is based in BC, the company and its employees are not around to meet workers on arrival. Meridian signaled their greatest pressure was providing on-arrival support, especially given how important this is for company morale and a positive working environment. Such support is not one of their company's fields of expertise.

Another constraint with international recruitments is the lengthy time-lag to bring workers into Saskatchewan. They expressed frustrations with processing times for TFWs at the federal level and frustrations with SINP processing times at the provincial level. The fastest turnaround for processing an international worker for a TFW permit from the Philippines was eight weeks. The quickest turnaround reported for bringing a TFW into Saskatchewan was two weeks, but government authorities reported normal processing times averaged three months.

Irish workers have been processed in as little as three weeks, but this was because the 2012 recruitment fair enabled Irish workers to have their immigration paperwork processed on the spot. This processing time was also possible because of an agreement signed between Ireland and the government of Saskatchewan. However, this agreement has taken many years to implement and was finally signed in large part because of the similar training/education standards found in Ireland.

Meridian's current approach to international recruitment is to build up a pool of readily available labour at least one-year in advance. Twelve Filipino workers arrived in Saskatchewan in March 2013, but these workers were interviewed in January 2012, with the expectation it would take a year to bring them through. As the Philippines is a well-known recruitment channel, Meridian has taken the extra step to establish a training workshop to support this work-ready pool of labour.

Similar to Coram, Meridian was a beneficiary to the Province's international recruitment fairs. Meridian participated in a 2012 delegation to Ireland where they interviewed 3,000 workers and short-listed hundreds of these workers. However, so far very few of these workers have been able to access the Saskatchewan labour market. Meridian's HR manager is fluent in French, and they planned to participate in the government of Saskatchewan's delegation to Tunisia in March 2013. However, with only two weeks before departure, Meridian had not received any CVs from Tunisian job agency ANETI for candidate screening pre-departure. However, Meridian had received a number of Adecco CVs from Tunisian candidates that they knew meant adding an additional $1,000 in commissions and fees to each candidate recruited.

Meridian expressed strong support and appreciation for the government of Saskatchewan's role in supporting SMEs with international recruitment. Without this support system in place, there would be no incentive for Meridian to consider recruiting Tunisian labour. However, it was apparent that despite good intentions from all parties Meridian was frustrated with the false expectations that had been created. Even for a company of Meridian's size it is a costly and strategic decision to conduct overseas recruitments. With only two weeks before departure to Tunisia and having received CVs only from Adecco, Meridian senior management was already very concerned the cost-benefit of the trip was too high.

Meridian is very receptive to hosting a Tunisian delegation of officials following their first recruitment mission to Tunisia. Possible interventions could begin with a simple follow-up phone call/email to Meridian HR. They also extended an invite for a Tunisian delegation to visit their offices and workshops. Meridian was also very encouraged by the strong supporting role francophone groups like ACF offered to Tunisian candidates on arrival.
5.2b. Brandt Industries Inc.

Brandt is a Regina-based company with over $1 billion in annual sales. They are the largest privately owned company in Canada; the majority of their manufacturing involves production for the popular John Deere farming equipment. Brandt Industries is actually an amalgamation of numerous product lines including Brandt Agricultural Products (farm equipment manufacturing), Brandt Developments (Real estate), Brandt Engineering (equipment supplier to mining industry), Brandt Equipment Solutions (official manufacturer of John Deere equipment), Brandt Finance (financing for new and used equipment), Brandt Road Rail (maintenance of way-rail equipment) and Brandt Tractor (construction and forestry equipment).

Brandt employs 1,700 employees and serves international markets in the US, Europe, Asia and Australia. At the time of discussions, hundreds of positions at Brandt were open for hires. Labour shortages included mechanics, assemblers (i.e., industrial assembly of large equipment), welders (mid-level welding); heavy-duty machinery operators, sales managers and product specialists. The company is not product based, everything is project based and depends on a demand for orders. This means they require a labour supply on a just-in-time (JIT) basis. For example, HR managers indicated they could have a sudden need for twelve welders with one week notice.

Their workforce is currently a mix of domestic and international workers. The HR manager interviewed is a second generation Filipino and over one-third of Brandt's workforce is Filipino. However, while the Philippines is clearly a primary source market for Brandt, the company expressed frustrations around managing the current 12 month immigration processing time for Filipino workers.

Brandt has established a partnership with a local training institute in the Philippines. In partnership with other John Deere suppliers, they have institutionalized a full training institute to ensure a work-ready supply of labour. Brandt forecasts they will need at least another 30 welders in the next eight to ten months; and the company's shortage of heavy-duty mechanics is even more acute. The company works closely with its overseas partners to confirm access to this future labour supply.

Brandt also recruits from other countries including Mexico, Ukraine and Ireland. The company seeks to bring multiple workers in at the same time as opposed to one-off recruitments. Ireland was viewed as a desirable recruitment channel for Brandt, because of the simplified immigration processing. As a result, the Irish are considered for urgent hires. The company uses countries like Ireland as a test labour market, if all goes well then they keep recruiting in order to build-up labour pools one-year in advance of their market related needs.

Interestingly, despite access to thousands of Irish workers through the government of Saskatchewan's overseas job fair, Brandt still uses a third-party recruitment firm in Ireland to ensure access to the best workers. Brandt HR had planned to travel to Tunis with the government of Saskatchewan but senior management chose to postpone out of concern over instability in Tunis (the fall-out from the assassination of a Tunisian opposition politician was sighted as the reason).

Brandt is very active in supporting their employees, especially foreign workers who seek to process applications for PR through the SINP. Similar to other SME-sized companies in Saskatchewan, Brandt works very closely with local diaspora organizations to support incoming workers. The company stressed that each worker is in fact an Ambassador for their country, and the employment success and community integration of each worker are critical factors to Brandt continuing recruitment in these countries. Similar to Meridian, they were encouraged by the strong supporting role francophone community associations could play for new arrivals.
Thanks to strong provincial government support there is a growing awareness of Tunisia. Tunisia is viewed as unknown but potential labour source for Brandt's HR division. Unfortunately, the company declined participation on this year's delegation but they welcomed a visit from Tunisian officials to familiarize them with the skill-sets available in the Tunisian labour market. They also welcomed further information from Tunisia on issues such as adaptability to new markets and English language ability. These are very good questions for the GoT and clearly, some pre-mission work is required to conceptualize a "Brand Tunisia."

The waved LMO processing for francophone candidates is viewed positively, but Brandt saw this as less of a competitive advantage given their company has already received "accelerated LMO processing" from the federal government.

5.3 Tunisia: Towards a Just In Time (J.I.T.) workforce

Saskatchewan industry will continue to depend on foreign workers given the forecast for continued strong economic growth combined with a shortage of workers in the Province. SMEs in Saskatchewan clearly take the approach of seeking to retain their workforce. A high turnover rate of workers (as witnessed in Alberta with TFWs) is not a prudent business strategy and financially unsustainable for SMEs over the long-term. Industry associations and SMEs in Saskatchewan identified three key challenges that had to be addressed to inject the needed confidence and trust in hiring foreign workers from a given country:

i. How long does it take to recruit and process the work permit (especially if an SME needs workers quickly);

ii. How can SMEs reduce uncertainty around skill-levels and a worker's credentials (do TFWs know tools, building materials, can they work in a timely manner?); and,

iii. What level support for newcomers (and the SMEs who hire them) is available to ensure workers have a smooth transition (settlement support, language training).

Interviews revealed approximate costs of $5,000 to $8,000 to bring in one foreign worker. This is a substantial cost, especially to an SME, and therefore they cannot afford anything less than one-hundred percent confidence the selected worker will result in a positive hire. On the issue of international standards, there is still much ambiguity that clearly concerns SMEs. An example was provided of a worker who held a recognized welding certificate, but when asked to perform a basic weld that should have taken twenty minutes it took the worker more than three hours. Some of this uncertainty also comes from the difference in equipment and technology between Canada and other countries. From a cost perspective, the SME is then responsible to get the worker up to standard.

i. Targeting those SMEs that already have overseas educational/training partnerships

In response to these above challenges, both Meridian Manufacturing and Brandt Industries formed partnerships with select overseas training institutes in the Philippines. The key objective is to establish a qualified pool of skilled workers to create a JIT labour-force. Both companies fully acknowledge without such a workforce they would not survive as a business. For Meridian and Brandt, a JIT labour force means their company has pre-approved and trained workers offshore and importantly, these workers are ready to depart in a week's notice. This is particularly relevant to the construction and manufacturing industries that frequently work on a project-by-project basis.

A JIT labour-force is therefore a crucial strategy to ensuring SME growth in Saskatchewan. Partnerships with such training institutes in the long-run bring greater comfort, and in time, SMEs are waking up to the fact they
will be able to cut-out the expensive third-party HR firms. Brandt referred to a JIT labour-force as seeking a "turnkey" operation; a business term which refers to when a product is ready for immediate customer use. Employers in the province signaled they are willing to cost-share with international partners to prove they have "skin in the game."

Meetings with the Regina Chamber of Commerce and the Regional Regina Opportunities Commission resulted in a strong signal of support to receive a joint IOM-Tunisia delegation for a one or two-day workshop with local industry. Following some additional familiarity around Tunisia and its labour supply, Brandt signaled its interest in a partnership with IOM to conduct a feasibility study to establish a similar training institute in Tunisia. This represents a significant medium and long-term opportunity for Tunisia, especially with its educated and skilled workforce and with the diversity of Tunisia's training institutes.

ii. Saskatchewan Institute of Applied Science and Technology (SIAST)

The Saskatchewan Institute of Applied Science and Technology (SIAST) is one agency that should be consulted and possibly included in any feasibility study or future discussion on creating a JIT labour force in Tunisia. In response to the economic boom in 2006-07, an increasing number of Saskatchewan employers began to recruit foreign workers but lacked a thorough understanding of a particular worker's qualifications. SIAST established the Skills Passport in 2008 in partnership with the federal government to address the challenges in international recruitment of key trades in select overseas locations (SIAST, 2008).

The program began by conducting evaluations in the applicants' country of origin on select work-place skills using the demonstration of prior learning assessment methodology. These foundational assessments then transitioned into technical assessments for in-demand occupations (i.e., welding, heavy-duty mechanics and construction) and eventually, the establishment of overseas assessment centres in partnership with local training institutions in the Philippines, Vietnam and the Ukraine. Specific local assessors in these countries are trained and certified by SIAST faculty. All Saskatchewan employers recruiting overseas are eligible to sign-up for the Skills Passport but SIAST makes it very clear that employers must still be involved in making the final decision on recruitments.

Under current TFW rules, a TFW cannot receive official training while they are employed in Canada and therefore can only receive training following acceptance as a Permanent Resident (PR). Officials explained this is in place to ensure fairness to Canadian workers, and unions in Canada are very sensitive to this issue. Once a TFW is in Canada and established in a job in the trade they must pass provincial apprenticeship exams if they wish to become a fully qualified journeyman and to stay on. But some industry and government officials expressed concern this could be "setting the worker up for failure". This is especially a concern to Saskatchewan where a large number of TFWs are converted to a PR.

To address this, SIAST is increasingly working with the department of CIC and the Canadian International Development Agency (CIDA) to develop bridges between overseas assessments for the recruitment of foreign workers and brokering training agreements with overseas educational institutes (discussions with SIAST officials). The training centre in Kyiv was identified as the 'Kyiv vocation school of construction and design.' Interviews with Canadian trades’ colleges and even the University of Regina revealed an increasing number of training partnerships to strengthen capacity at overseas educational institutes.

The department of CIC approached SIAST (2013) to expand the current number of skilled trades’ occupations in their assessment portfolio and this is consistent with the federal government's establishment of a new Visa category for skilled workers. SIAST assessments are used by industry and also by CIC immigration officers to improve the due diligence around processing work permits for TFWs. In discussions with SIAST officials, there could also be interest to consider the feasibility of expanding beyond the Philippines, the Ukraine and Vietnam into other regions.
iii. Saskatchewan's HealthCare Human Resource strategy

Importantly, similar medium to long-term opportunities also apply to the health care industry given the sensitivity of working with patients and the high standards required to gain access to the labour market. The healthcare industry in Saskatchewan is characterized by labour shortages and standards. The industry is also facing massive shortages of skilled trades professionals because these workers must be certified before working in an institutionalized industry (for example, a Cook or Boiler Operator in a hospital).

Interviews with officials from the Ministry of Health HR division revealed they currently prospect and conduct recruitments in Ireland and the Philippines. Familiarity with Ireland particularly on the bachelor of nursing program (which runs for a 4 years duration) has allowed the Ministry to sign a reciprocity agreement with Irish nursing agencies/regulatory bodies.

Saskatchewan is acutely aware of the parasitic issue at play when recruiting in the healthcare industry. Stories of entire hospital wards of Saskatchewan nurses leaving for higher paying jobs in Alberta were highlighted. The Ministry of Health's HR division is open to a conversation with a future Tunisia delegation, but they recommended such a discussion should also include representatives from Tunisia's health care/regulatory bodies.

6. Recommendations

Short to Medium-term

- In coordination with the national francophone body in Ottawa (RDEE), follow-up directly with the local FMC association in Regina (ACF) who have a strong history of supporting African francophone immigration and who have expressed support in providing on-arrival assistance to incoming TFWs from Tunisia.

- This discussion should also include the Province, given how proactive provincial officials have been in promoting Tunisian labour and the Destination Canada program.

- Follow-up with ACF francophone community representative Mr. Ronald Labreque in Regina, to discuss the harmonization of English language training programs offered in Tunisia with those offered in Regina with a view to overcoming a key barrier to entry for Tunisian labour, and especially important in jobs where safety is paramount.

- The Saskatchewan Construction Association is the gateway to five to six SME sized enterprises that each requires hundreds of workers by 2014; Tunisia should develop targeted promotional materials for the SCA's newsletter and make a presentation to the SCA Board.

- Conceptualizing and Implementing "Brand Tunisia." Saskatchewan employers and government representatives have become much more familiar with Tunisia, including the ANETI job agency, largely as a result of their active participation in Destination Canada. For its part, the GoT through ANETI and ATCT, should ramp up their market intelligence of Saskatchewan to maximize the opportunity for Tunisian workers:

  - Major recruitments are undertaken in the winter period (December-March);
  - A minimum level of English is critical especially for safety reasons;
Each TFW is also viewed as an Ambassador by their employer - this plays a key role in any further recruitment from the TFWs country;

- SMEs are not only looking for strong workers, but for employees who integrate well into the community;
- SMEs are looking to hire those workers which already have industry experience;
- Saskatchewan SMEs must receive Tunisian CVs at least two weeks pre-departure in order to undertake early screening of candidates.

Given the provincial government's proactive policy supporting their SMEs with international recruitment, follow-up individually with the following SMEs who have accelerated LMO status and who currently spend significant capital on third party HR firms to recruit TFWs:

1. **Coram Construction** who will require another 500 workers by 2014.
2. **Meridian Manufacturing** who participated in the Tunisian recruitment mission (March 2013) and who require another 30 workers by July 2013. They invited a Tunisian delegation to visit their manufacturing workshop.
3. **Brandt Industries** who require hundreds of workers, and who are now sourcing these workers from the Philippines, Ukraine and Ireland. They are very encouraged by bridges that could be built between their company, arriving francophone workers and francophone support associations.

Saskatchewan is a province characterized by SME-sized enterprises; over 90 per cent of which do not have HR divisions and must outsource to third-party HR firms to conduct their recruitments. Building up greater knowledge on the activities of HR firms such as Prudhomme International Inc is beneficial because they are clearly key players in international recruitment. PI Inc receives job offers from multiple companies and they are active recruiters in Tunisia.

**Medium to Long-term**

**Towards a Just-In-Time (JIT) labour-force:**

A high turnover rate of workers is not prudent business strategy and is financially unsustainable for SMEs over the long-term. SMEs in Saskatchewan also expense significant costs per worker recruited, between $5,000 and $8,000 and they cannot afford anything less than one-hundred percent confidence the selected worker will result in a positive hire. Two larger SMEs have now formed partnerships with select overseas training institutes in the Philippines. The key objective is to establish a qualified pool of skilled workers to create a JIT labour force.

The majority of foreign workers in Saskatchewan have been recruited from Ireland, the UK, Ukraine, Poland or the Philippines. The key reasons industry keeps returning to these countries is the trust and confidence they now have in the work ethic of TFWs from these countries, but crucially, their pre-approved training standards.

- The Regina Chamber of Commerce and the Regional Regina Opportunities Commission signaled support to receive a joint IOM-Tunisia delegation for a two-day workshop with local government and industry. A number of key stakeholders should be invited to this work-shop including:
- Saskatchewan Apprenticeship and Trade Certification Commission (SATCC) to bring expertise on foreign credential recognition & trade certification process in Saskatchewan;
- Saskatchewan Institute of Applied Science and Technology (SIAST) to discuss their Skills Passport and international projects undertaken to institutionalize training capacities overseas;
- Saskatchewan Ministry of Health, to discuss labour demand for nurses and special care aides, both of which are highly regulated occupations;

- A number of local SMEs, particularly those who have already set-up overseas training centres with local partners. Brandt Industries has already signaled its interest in conducting a feasibility study to establish a similar training institute in Tunisia; and,

- Local francophone community representatives, such as Mr. Ronald Labreque from ACF.
Conclusion
Conclusion

There is growing awareness of how migration can improve the welfare of migrants who depart and their dependents (through the receipt of remittances) as well as to the economies of labour sending and receiving countries. At the UN General Assembly Dialogue on International Migration and Development in 2006 and the Global Forum on Migration and Development in 2007 the majority of participants agreed migration holds considerable potential for economic and social development (IOM, 2008).

The Tunisian Ministry of Foreign Affairs approached the IOM to deepen the government's knowledge of labour migration opportunities in Canada. Until recently, Tunisia had traditionally focused on identifying international placement opportunities in geographically proximate locations or in those countries where the main working language is French. However, employment in more distant countries such as Canada and Australia, where the working language is predominantly English, are becoming viable alternatives.

The GoT views international recruitment to labour markets such as Canada as complementary to its current domestic employment generation programs. However, Tunisian authorities have limited information on the Canadian labour market and particularly those industries and employers with occupations in demand; including limited awareness of Canadian industry and those companies that could serve as a starting point to create new opportunities for Tunisian job seekers.

The three main agencies tasked with implementing labour migration policy in Tunisia includes: (i) the National Agency for Employment and Independent Work (ANETI) under the Ministry of Vocational Training and Employment and who are in charge of labour intermediation in Tunisia and abroad; however, they have no physical representation in other countries; (ii) the Tunisian Agency for Technical Cooperation (ATCT) under the Ministry of Planning and International cooperation, they typically have specialized in secondments and have attaches based in Tunisian embassies in the MENA region and (iii) and the Office for Tunisians Abroad (OTE) under the Ministry of Social Affairs in charge of supporting and assisting the Tunisian diaspora.

The comparative advantage for the Tunisian labour market is directly related to those occupations in major industry sectors of the economy, including tourism, ICTs, manufacturing, mining and agricultural production. Each of these sectors is serviced by a range of foreign and domestic enterprises, as per the pre-revolution economic policy of creating a sizeable offshore market in Tunisia. The comparative advantage of Tunisian labour corresponds to those skill-sets being sought by Canadian industry participating in Destination Canada recruitments in Tunis and to the majority of Canadian job offers posted through the ANETI job website.

The Canadian economy is one of the strongest performers of the G7, and economic forecasts indicate a GDP growth rate of 2.5 per cent in 2014 (Wright, 2013). Employment levels are predicted to increase by 200,000 to 250,000 in 2013 and 2014, with the unemployment rate falling below seven per cent at the end of 2013. The Canadian labour force needs immigrants: low fertility rates and a large percentage of retiring older workers are eroding the supply of labour. Immigration is seen as the solution to these demographic constraints and analysis suggests future immigration intake levels must continue increasing on an annual basis through at least 2016.

For the GoC a prearranged job offer and language ability (in at least one of the country's two official languages) are the key determinants to immigrant success in Canada. Recent policy changes to Canada's immigration system include (i) shifting the priority for selection towards skilled based migration; (ii) establishing a skilled-trades specific VISA category; (iii) devolving more constitutional powers to the provinces as they are in a better position to determine labour market needs; (iv) expanding use of the temporary foreign worker (TFW) program to help Canadian employers respond to significant labour shortages, and these are targeted at a range of high, semi to low skilled levels.
Key Strategic Opportunities and Considerations for Alberta

The hotel and lodging industry contributed over $6.0 billion to the Albertan economy in 2012. The workforce added 6,000 new jobs from 2010 to 2011 totaling 130,000 workers. The industry is characterized by a majority of SME-sized enterprises with less than fifty employees, many of whom work part-time or seasonally.

The AHLA is looking for a more long-term and sustainable strategy that would enable their industry to access the labour it needs to serve local, national and international visitors. Interviews with the CEO of the AHLA revealed that the industry has been using TFWs to fill gaps in the local labour supply for more than ten years. The CEO felt that TFWs in his industry were, in actuality, filling FTE positions. The industry is heavily reliant on TFWs and frequently advocate for less administration around the processing of foreign workers. Some of the major constraints for the industry:

i) an onerous LMO process, whereby when a position becomes vacant from a departing TFW, they cannot fill this position without re-applying for another LMO from HRSDC;

ii) an employer who owns multiple hotels must launch one-LMO per each property; and,

iii) given the seasonal nature of the work, employers are often unable to provide full-time hours to all employees but they are obliged to provide full-time hours to TFWs.

The CEO invited Tunisia to approach the AHLA to familiarize its Board and key members with the Tunisian workforce. The CEO was honest about stating a number of countries have approached their association with only a few chosen. However, Tunisia represents an experienced labour supply that could fill many of the key occupations in demand given the significant hotel and tourism industry in the country. Moreover, similar to the Philippine's public job agency (the POEA) and Jamaica's ministry of labour, Tunisia has two key public job agencies that have been historically active facilitating international recruitments: the ATCT and ANETI. While Tunisia does not have consulate representation in western Canada, on arrival support and assistance could be explored further with francophone settlement agencies in Alberta.

The oil and gas industry is the largest in the Province contributing 27 per cent to Albertan GDP in 2011, or approximately $80 billion. Since 2001 employment in the sector has increased from 96,100 people to 150,000 people in 2011.

Jacobs Canada is a key player in Alberta's oil and gas industry. The company travelled to Tunisia and participated in Destination Canada recruitments. They expressed support for Tunisian and Canadian embassy officials who facilitated this international recruitment process, and offered direct feedback on how the GoT could improve logistics and coordination:

i. Candidate arrival process and screening: over the three days there was confusion on which candidates were there to be interviewed and where/when they were to be tested;

ii. Kram training centre instructors - their role in the recruitment process was not clear; and,

iii. Safety standards - equipment and tools were not up to Canadian industry standard but more concerning was witnessing inadvertent violations of basic safety standards...safety is a critical issue for Jacobs given the sensitive work on oil pipelines.

Jacobs was appreciative of the supporting environment found in Tunisia, but only two candidates were identified in November 2012. Even for a large company like Jacobs, the expense to fly two HR staff and a QA manager to Tunisia for the net return of two candidates is not a positive return on investment. Further interviews with Jacobs signaled that the company would continue with international recruitments, but senior executives are not yet convinced on the merits of recruiting from Tunisia.
Key Strategic Opportunities and Considerations for Manitoba

The Manitoban government takes a very "hands-on" approach to immigration. They work in close partnership with local communities and SME-sized companies to attract immigrants, and importantly, to ensure they stay in Manitoba. The Manitoban immigration model (MINP) is considered a best practice, with 85 per cent of provincial nominees working after three months and an unemployment rate for newcomers that is one of the lowest in Canada. Demographic challenges have meant that the government must prioritize settlement and retention of newcomers. This also complements a provincial labour market that consists primarily of SMEs. These smaller companies cannot afford high-turnovers of TFWs like their larger counterparts and they need workers who will stay.

Discussions with Manitoba government officials revealed how a recruitment agreement was established with the Ukraine. First, the Ukrainian diaspora community approached the Manitoban government. The government then worked with the diaspora community in order to identify local stakeholders who are willing to participate in an overseas recruitment mission to Kyiv. Five SMEs from Manitoba participated in the recruitments, with community representatives from the Ukrainian diaspora offering assistance. Over 250 pre-identified candidates were interviewed, and over 200 candidates were invited to formally apply to the MINP program.

Similar recruitment agreements have been signed with the Philippines and Iceland. A number of European countries, including Greece and Spain, have also begun to approach Immigration Manitoba.

When informed of the Destination Canada (DC) partnership with Tunisia, the government of Manitoba invited Tunisian representatives to initiate discussion on a similar recruitment-type agreement. When it was mentioned that the total number of Tunisians who came to Canada since 2009 via DC was approximately 150; Manitoban officials reacted with excitement because:

i) it demonstrated previous history and experience on the Tunisian side bringing workers into Canada; and,

ii) the sample size of 150-200 was an ideal starting point for them (that is, it enables better research due to smaller sample size. This allows respective parties to start with smaller target population then gradually increase the intake).

ANETI and ATCT should start now by working through the Canadian embassy to encourage provincial officials from Manitoba to participate in DC events in Tunis in November 2013. Tunisia lacks a diaspora such as the Filipino and Ukrainian communities in Manitoba, but the strong presence of local FMCs could play a strong bridging role in serving as an ad hoc diaspora for Tunisian newcomers. These FMCs should also be encouraged to participate in the upcoming DC event in Tunis.

The Manitoba Trucking Association (MTA) signaled their industry is facing a significant shortage of drivers. A key challenge for Tunisia is the issue of border crossing; given most Canadian trade and transport routes must cross the U.S.A border. For Tunisians who seek to be drivers in Canada, at the same time as they process their Canadian work permit, they will need to also apply (offshore) for a B1 US VISA at the U.S. embassy in Tunis. Other direct challenges for Tunisian drivers included a lack of previous experience. Recruiters in Tunisia found many applicants were in fact bus drivers and not long haul truck drivers, which is a very different trade.

ANETI and ATCT should approach the Canadian and American embassies in Tunis to explore complementary VISA processes for Tunisian truck drivers that have already been approved to work in Canada. The MTA indicated that even if Tunisian training qualifications do not meet Manitoban standards, they offered to share training manuals developed in-house.
Key Strategic Opportunities and Considerations for Saskatchewan

Saskatchewan is a substantial participant in Destination Canada recruitments in Tunisia. Provincial officials travelled to Tunis in November 2012 and returned again in March 2013, the second time they brought eight to ten SMEs. FMCs in Saskatchewan are active in immigration and international recruitments. Mr. Ronald Labreque of the ACF participated in DC and continues to liaise with counterparts at ANETI. The majority of employers in the Province are SME-sized and therefore they frequently turn to third-party HR firms to outsource recruitment. Prudhomme International Inc, a small HR firm in Regina, participated in DC and continues to return to Tunisia to conduct skilled-trades related recruitments on behalf of multiple SMEs.

Saskatchewan industry will continue to depend on foreign workers given the forecast for continued strong economic growth combined with a shortage of workers in the Province. SMEs in Saskatchewan clearly take the approach of seeking to retain their workforce. A high turnover rate of workers is not a prudent business strategy and financially unsustainable for SMEs over the long-term. It is clear from the interviews Saskatchewan industry seeks a JIT labour-force, and together with government agencies, they have begun taking the steps to achieve this. Industry associations and SMEs in Saskatchewan identified three key challenges that had to be addressed to inject the needed confidence and trust in hiring foreign workers from a given country:

ii. How long does it take to recruit and process the work permit (especially if an SME needs workers quickly, on a project-by-project basis);

iii. How can SMEs reduce uncertainty around skill-levels and a worker's credentials (what is the TFWs knowledge level of various tools, equipment and different building materials?); and,

iv. What level support for newcomers (and the SMEs who hire them) is available to ensure workers have smooth transitions (settlement support, language training).

Interviews revealed approximate costs of $5,000 to $8,000 to bring in one foreign worker. This is a substantial cost, especially to an SME, and therefore they cannot afford anything less than one-hundred percent confidence the selected worker will result in a positive hire. On the issue of international standards, there is still much ambiguity that clearly concerns SMEs. An example was provided of a worker who held a recognized welding certificate, but when asked to perform a basic weld that should have taken twenty minutes it took the worker more than three hours.

Conceptualizing and Implementing "Brand Tunisia"

Saskatchewan employers and government representatives have become much more familiar with Tunisia, including the ANETI job agency, largely as a result of their active participation in Destination Canada. For its part, the GoT through ANETI and ATCT, should ramp up their market intelligence of Saskatchewan to maximize the opportunity for Tunisian workers:

- Major recruitments are undertaken in the winter period (December-March);
- A minimum level of English is critical especially for safety reasons;
- Each TFW is viewed as an Ambassador by their employer. Therefore, their integration into the company and the community plays a key role in any further recruitment from that TFWs country;
- SMEs are looking to hire those workers which already have industry experience; and,
- Saskatchewan SMEs must receive Tunisian CVs at least two weeks pre-departure in order to undertake early screening of candidates.
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Annexes
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## ANNEXES

### Table of Contacts

**Alberta**

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Manitoba

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<td>Science and Technology</td>
<td>International Projects</td>
<td>Saskatoon</td>
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<td>5</td>
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<td>Suite 101, Regina.</td>
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<td>6</td>
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<td></td>
<td>Commission</td>
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<td>7</td>
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<td>8</td>
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<td>9</td>
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<td>10</td>
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<td>11</td>
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<td>Recruiter</td>
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<td>12</td>
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<td>13</td>
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<td>North, Regina.</td>
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ANNEX I

Source: Canadian Geographic (http://www.canadiangeographic.ca/magazine/ja94/alacarte.asp)
## ANNEX II

### Research Methodology

#### a. Survey of Government Stakeholders

<table>
<thead>
<tr>
<th>Thematic Area</th>
<th>Associated Queries</th>
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</table>
| ➢ **i. Canada/Provincial immigration data/policy** | - Identify and explain any MoUs (Memorandums of Understanding) in place between governments (eg, Quebec-Canada) vis-a-vis labour market access.  
- From the NOC list, which occupations are in high demand? Next 5+ years?  
- What are key economic VISA categories for your province? i.e., PNP  
- PNP target for 2013? What has been the growth over last 5 years?  
- What are the average numbers of PRs admitted on an annual basis?  
- How does the Canadian Experience Class Visa impact your provincial numbers of immigrants? What are this year's numbers? 2014?  
- How many TFWs are in the Province? Now? Next five years?  
- Duration of TFW VISA? What happens when it expires?  
- How do the new VISA categories impact your Province, including the new: 1) Skilled trades visa; 2) Entrepreneurship + Start-Up Visa.  
- What is the profile of Maghreb immigration/Tunisia specific?  
- What is the breakdown in your Province of the non-immigrant population? In which regions are they living?  
- What specific programs are available to immigrants/employers who hire?  
- Programs to support families/spouse of immigrants? |
| ➢ **ii. Labour Market** | - Identify labour shortages/those industries hiring foreign workers.  
- What are the key sectors and occupations we find immigrants/TFWs?  
- Are there some industries/sectors which are having more success with economic immigration - why is this?  
- LMO - how does this work for industry in your Province?  
- Stats on full-time versus part-time employment?  
- Wage data profile by major sector and occupation?  
- Industry profile of the Province - i.e., jobs in city or located outside cities?  
- Workplace safety laws - where does a newcomer/immigrant find the information they need to make the workplace transition? |
| ➢ **iii. Training** | - What are the key skills we find in high demand/province?  
- Identify any government sponsored training programs for new workers, new immigrants?  
- What are the links between college/university and work-placed skills?  
- Are there any formal links between trade colleges and local industry?  
- Trends of international students transitioning to Canadian economy? |
| ➢ **iv. Recruitment specifics** | - Does your Province assist its industry with international recruitment?  
- Which sectors in need of foreign workers?  
- Which industries participating internationally in recruitment?  
- As part of D. C. program (for industry outside Quebec)?  
- Involvement of third party recruiters, immigration agents? Laws to protect immigrants? |
| ➢ **v. Languages** | - Need for bilingualism: or is French, English more dominant?  
- Identify any language support/training offered? |
### vi. Settlement/Integration support
- Support programs available - what duration?
- Links to diaspora community associations?
- Links to Francophone community associations (outside Quebec)

### vii. Capacity Building/Next Steps
- Have you observed any diaspora best practices vis-a-vis economic immigration and recruitment?
- How can Embassy and Consulates play a stronger role?

### b. Survey of Industry Stakeholders

<table>
<thead>
<tr>
<th>Thematic Area</th>
<th>Associated Queries</th>
</tr>
</thead>
</table>
| i. Industry/Co profile        | - Company name & brief history.  
- Industry type, projections on growth in industry - today, next 5 years.  
- What are the services/products?  
- Core equipment necessary to make products?  
- Links to other partners or major suppliers?  
- Is there an office/staff member dedicated to foreign labour sourcing?  
- Links with any government supported immigration programs - i.e., Destination Canada, provincial wage subsidy programs. |
| ii. Labour force              | - Size of workforce - number of employees, is it global, regional or national?  
- Identify the key occupations for which they are hiring.  
- Average annual wages for these occupations?  
- Full-time work or part-time?  
- Dependent on foreign labour? TFW program or other VISA category?  
- What is the ratio of domestic versus foreign labour?  
- What is the relationship with Unions? |
| iii. Training/Skills +         | - What are the key skills in demand for each occupation - i.e., entry-level worker? Mid-career worker?  
- Access to training programs for new workers, immigrants?  
- How does a worker up-skill in this industry?  
- What are your company's links to college/university apprenticeship programs?  
- Links to local or regional industry?  
- Trends of international students transitioning into your workforce? |
| Credentials                    |                     |
| iv. Recruitment specific       | - Foreign countries in which you have conducted recruitments?  
  - Why this region of the world? Why this country?  
  - Breakdown of hires by foreign country recruitment?  
  - How are the skills of foreign workers assessed? Which tests are performed, are they based on Canadian industry standards (i.e., ASME IX code for pressure welders).  
  - Which regulatory bodies does the company work with?  
  - How many workers hired thru D. Canada program (for industry outside Quebec)?  
  - Is the Co. involved with third party recruiters, immigration agents? |
| v. Languages                   | - Which is the working language of your Co: French, English?  
- Can a worker still achieve success without language mastery? |
ANNEX III

Canadian Immigration Categories established by CIC and the NOC System

(i) Federal Skilled Worker (FSW) program: Main objective: select skilled workers, which can succeed in Canadian economy based on criteria that have been shown to help adapt to the Canadian LM and society. Federal skilled workers include Trades/Technicians (plumbers, welders, carpenters, cooks, pipefitters); Managers (in manufacturing and utilities, sales, marketing, transportation, construction, health) and Professionals (physicians, mathematicians, applied scientists, engineers, teachers and instructors).

- Planned range for 2013: 53,500 to 55,300. FSW profile in 2011: 84% managerial and professionals, 16% skilled and technical, 46% have university education, 4.3% PhDs. Majority age: 30-39 years. Principal countries of origin: India (21.5%), Philippines (11.5%) and China (11.3%).

- Major change results from evidence showing younger immigrants integrate more rapidly into LM and contribute longer to Canadian economy and social programs; also foreign experience and education was under-valued in Canadian labour market and weak indicator of economic success; therefore, CIC plans to decrease maximum points awarded for foreign experience, making additional points available for language and age.

<table>
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<tr>
<th>The Current Point System</th>
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<tr>
<td>English and French Abilities</td>
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<tr>
<td>Education</td>
</tr>
<tr>
<td>Work Experience</td>
</tr>
<tr>
<td>Age</td>
</tr>
<tr>
<td>Arranged Employment</td>
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<tr>
<td>Adaptibility</td>
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<tr>
<td>Total</td>
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</table>

(Current pass mark: 67)

(ii) Entrepreneur Program: Under current Immigrant Entrepreneur program, entrepreneurs with at least 2 years experience, minimum networth of $300K could enter Canada. However, GoC research indicated the program did not contribute to economic enhancement and placed a moratorium on all applications.

(iii) Start-Up VISA: For Immigrant Entrepreneurs: To be implemented as a 5-year pilot program. It is aimed to better support economic priorities related to innovation and productivity. The Start-Up VISA is new and designed to proactively target a new type of immigrant entrepreneur with the potential to build innovative companies that can compete on a global scale and create jobs. Under this proposed category, a foreign entrepreneur would be required to have a private sector partner in Canada before applying for the VISA.

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8Information is taken from communications and documents received from CIC officials in February 2013.
(iv) Immigrant Investor Program (IIP): For investors who can demonstrate business experience, possess a minimum net worth of $1.6M, and make an investment of $800,000. However, a temporary pause on new applications was imposed until further notice.

(v) Expression of Interest (EOI): The government is currently putting the finishing touches on the EOI VISA category (2013). The concept is to attract skilled foreign workers to complete an online form and thereby enter into a labour pool where they can be ranked, sorted and searched by Canadian businesses who then invite successful candidates to apply. The government of Canada sees this as a way to give Canadian industry a more direct manner to access skilled workers and facilitate access to in-demand skills, and reduce processing times.

(vi) Federal Skilled Trades Program - launched in January 2013 this new program will help select skilled workers in trades who meet Canada's current and evolving economic needs. Program is aimed at helping fill labour market gaps in skilled trades; recognize differential provincial certification processes; place safeguards on applicant quality; a cap of 3,000 applications plus sub-caps are in place to manage intake.

<table>
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<tr>
<th>Program Criteria (Pass/Fail model with four requirements)</th>
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<tr>
<td><strong>Arranged Employment OR P/T certificate of qualification:</strong> to ensure that applicants are &quot;job ready&quot; upon arrival</td>
</tr>
<tr>
<td><strong>Mandatory language</strong> threshold: to ensure that health and safety standards are upheld and improve socio-economic integration</td>
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<tr>
<td><strong>Work Experience:</strong> 2 years (in last 5) as a qualified skilled tradesperson to ensure that the applicant has recent and relevant practice as a qualified journey person</td>
</tr>
<tr>
<td><strong>Education/Qualification:</strong> Satisfy National Occupational Classification (NOC) employment requirement to demonstrate that applicants have performed the essential duties of the occupation</td>
</tr>
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</table>

(vii) Canadian Experience Class (CEC): Open to applicants (TFWs and international students) who demonstrated successful employment in Canada in a skilled occupation, includes foreign students who are permitted to work a set number of hours during their studies.

- Canada has welcomed over 20,000 PRs through the CEC category. Changes to the program include merging two streams of foreign student graduates and TFWs.

- The GoC also reduced the minimum required work experience from 24 months to 12 months within the preceding 36 months. The language threshold has increased to higher levels for all NOC O, A and B applicants under this category.

- Planned intake range for 2013: 9,600-10,000; principal countries of origin are China, India, U.S.A. The CEC outcome for 2011 was 3,722 TFWs and 3,193 students admitted.

(viii) Provincial Nominee Program (PNP): Immigrants are nominated by a provincial or territorial government based on regional needs, with assessments focusing particularly on an individual's ability to economically establish. GoC makes final selection decision. The province of Quebec is slightly different from other provinces in that it has a special Accord with the GoC giving it more selection authority. CICs
plans for 2013 commit to working with Provinces to improve PNP by focusing on economic integration in order to respond to regional LM demands.

- Planned range for 2013: 42,000 to 45,000;
- Main provinces of destination in 2011: Manitoba, Alberta and Saskatchewan;
- More than 90% of PNP immigrants declared employment earnings after one year in Canada, average income ranged from $35K to $45K after 3 years.

**Alberta Immigrant Nominee Program (AINP)**

Under Alberta's AINP program there are two major streams for entry. Under the employer driven stream, an Alberta employer offers the foreign worker a full-time job. Together, the employer and the foreign worker determine which category of the AINP to apply under. The category could be either as a skilled or semi-skilled worker or as an international student. The Alberta employer and candidate fill out all necessary forms at the AINP website (Alberta Ministry of Finance and Enterprise, 2012b).

The second stream is the strategic recruitment stream, where the candidate reviews the eligibility criteria and determines their appropriate category. These categories are based on industry-backed standards such as compulsory and optional trades or engineering occupations. The candidate then fills out all forms and gathers together the required supporting documents. For the 37 compulsory trades in Alberta, supporting documentation must include a qualification certificate from the Alberta Apprenticeship and Industry Training (AIT) agency.

The AINP then reviews the application. If the applicant meets all eligibility requirements, they receive nomination for AINP. The AINP then mails confirmation to the applicant or the nominee to submit their application to nearest CIC bureau. Successful AINP applicants are also eligible to bring their spouse and family/children with them to Alberta (Ministry of Finance and Enterprise, 2012d).

Alberta's settlement services are delivered through the Canada-Alberta Integrated Services Program. There are currently 17 immigrant-serving agencies in 9 communities across Alberta. However, these programs are only for Permanent Residents to Alberta, with the exception of TFW from the Philippines participating in the Canada-Philippines Live-In Caregiver program. The majority of these services are delivered in major cities of Calgary and Edmonton but some are offered in rural communities. Language classes receive the majority of the budget ($4.1 million in 2012), but other services include employment readiness, supportive counseling, ethno-cultural collaboration and newcomer outreach.

**Manitoba Immigrant Nominee Program (MINP)**

Officials with the provincial government communicated a desire to ensure their immigrant attraction/retention model followed a "service continuum." The department views immigration through a four-staged process: 1) Selection: review common goals, understand occupations in demand, understand Manitoba and assess available resources; 2) Pre-Arrival: coordinate pre-departure orientation with international associations such as the Canadian Immigrant Integration Program; 3) Nomination: approvals before arrival, or within 6 months of arrival, take assessments, receive documentation on orientation and 4) On-Arrival: referral to job support programs, language training and ensure each candidate is entered into central registry (entitled *Manitoba Start*).

*Manitoba Start* is the Immigration Ministry's core initiative that provides a single-window early arrival immigration intake offering referrals, employment readiness and job matching services for nominees destined to Manitoba. *Manitoba Entry* is the newcomer orientation program. It offers skills assessments,
employment guidance, job matching and language support. In 2011, the program assisted 595 skilled immigrants with the costs of assessments and examination fees, courses and materials to achieve accreditation and provided wage subsidies for placement of nine foreign workers in their respective fields of expertise (Manitoba Ministry of Labour and Immigration, 2012c).

A potential newcomer to Manitoba first files an online application where it is assessed for nomination based on five key criteria related to the applicant's connection to the Province:

1. Currently working in Manitoba as a TFW or international student;
2. Invited to apply after being interviewed in a recruitment mission or exploratory visit;
3. Have a settlement plan supported by a close relative established in Manitoba and meet minimum criteria (such as being a strong prospect for employment);
4. Have a settlement plan supported by a friend or relative established in Manitoba and be assessed at least 55 on the Points Grid;⁹
5. Have a past school or work experience in Manitoba and be assessed at least 55 on the points grid (http://www.immigratemanitoba.com/how-to-immigrate/eligibility/).

The department then sends the successful applicant an approval letter. If the applicant is approved they receive a nomination package, and at the same time a formal certificate will be sent to the Canadian embassy closest to where the applicant lives. The applicant then applies for a permanent residence visa from the nearest embassy or consulate, including submitting a visa application, processing fees and the original MINP nomination letter. Final decisions on Permanent Residency are made by the department of CIC, who conduct additional checks including security, medical and other background checks.

Applications for PR can be expedited in one of two ways. If the applicant has already received a job offer from a Manitoba employer, the MINP will then issue an additional support letter for a work application. For TFWs already in the province, Immigration Manitoba advises them to contact their department at least two months before the expiry date of their work permit as this will allow the TFW to seek a renewal of their work permit while they await processing.

In 2012, the Immigration Manitoba ramped up its support for Growing Through Immigration Strategy, to support the integration of immigrants in Manitoba in areas such as employment and training, settlement coordination, children and youth at risk and neighbourhoods and communities. In addition, the department administers the Manitoba Immigrant Integration program (MIIP), which provided $30 million to over 105 service providers to deliver pre and post arrival settlement and labour market orientation, employment readiness and English language training.

Saskatchewan Immigrant Nominee Program (SINP)

The SINP is a formal agreement with the federal government for a certain number of reserved spaces for new immigrants based on criteria specifically developed by Saskatchewan. Saskatchewan has made annual requests for increases to its allotted spaces, but this number has typically remained around 4,000 despite having three times as many applicants on an annual basis.

⁹Points are calculated based on a self-assessment tool that ranks candidates based on work experience, age, language ability, adaptability and skills.
To access the program a potential immigrant applies to see if they are eligible. If the SINP deems them eligible, a nomination letter is issued confirming they have been selected. After the applicant receives their nomination letter, they must submit their application and nomination letter to the nearest CIC centralized intake office that works with Canadian embassies around the world. CIC completes health, criminality and security assessments and they make the final decision to issue a VISA.

Although Saskatchewan nominates, it is Citizenship and Immigration Canada (CIC) that makes the final decision. Government of Saskatchewan officials confirmed they experienced recent backlogs in processing applications, possibly as a result of the federal government's modernization agenda in that VISA processing centres had either been shutdown or their staff numbers reduced.

Under the SINP program, a sub-category called the "Group of Employers" offers SMEs accelerated access to high-skilled foreign workers. The department also provides funding to community-based groups to coordinate settlement support and to English language training programs.

**The Canadian National Occupation Classification (NOC) System**

The NOC provides a standardized language for describing the work performed by Canadians in the labour market. It classifies occupations using a four-digit code according to the skill type and level (source: www.hrsdc.gc.ca/workplaceskills/noc).

(i) Industry categories and occupations are classified by:

0  Management occupations  
1  Business, finance and administration occupations  
2  Natural and applied sciences and related occupations  
3  Health occupations  
4  Education, law, community and government services occupations  
5  Art, culture, recreation, sport occupations  
6  Sales and service occupations  
7  Trades, transport, equipment operator and related occupations  
8  Natural resources, agriculture and related occupations  
9  Manufacturing and utilities occupations

(ii) **Skill Level criteria:**

- **Skill level A:** University degree (bachelor's, master's or doctorate)  
- **Skill level B:** 2-3 years post-secondary education, 2-5 years apprenticeship training  
- **Skill level C:** Completion of high school, or up to 2-years on the job training.  
- **Skill level D:** No formal education required. Some on the job training

(iii) **NOC exemption for francophone immigrant workers:** As per the IRPA section 3(1)(b) to enrich and strengthen social and cultural fabric and contribute to bilingual and multicultural character of Canada, and sub-paragraph 3(1)(b) of IRPA to support and assist the development of minority official languages - a high-skilled (NOC A+B) worker destined to provinces other than Quebec, with demonstrated French language ability may benefit from certain exemptions, including expedited work permit processing and
waving of the LMO process for Canadian employers making the hire. The job offer does not have to require French language ability. This is intended primarily for recruits through Destination Canada.
The Canadian Labour Market:
Exploring Employment Opportunities for Tunisians

By Tomas Ernst