Migrant workers: Challenges and opportunities in addressing tourism labour shortages

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A B S T R A C T
The International Labour Organization (ILO) estimates the number of migrant workers at 105 million worldwide, and their share within the tourism industry, particularly the hotel and restaurant (HoReCa) sector, is growing rapidly. The focus of this paper is migration in OECD member countries, specifically on official government positions with respect to the integration of migrant workers into the host society. Most countries recognise that the structural challenges and seasonal fluctuations in tourism will continue to encourage operators to resort to cheaper migrant workers, particularly for entry level positions, both legally and illegally. Until now, most OECD member countries have largely ignored the challenges and (ab)use within the industry concerning migrant workers, but will not be able to continue to do so for much longer. It is urgent that countries improve their ability to measure migration patterns by country of origin to determine training needs and other assistance required and engage employers appropriately.

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1. Introduction

Cross-border mobility has been increasing as a corollary to globalisation and intensification of trade and investment, but also as a result of political turmoil, the growing income inequality between and within countries, and decreases in the cost of transportation (ILO, 2010a). Within this scope, the movement of people for purposes of leisure and work is a particularly interesting phenomenon with extensive social, economic and environmental implications. While the rapid growth of international tourism, which reached an estimated 935 million in 2010 according to the World Tourism Organization (WTO, 2011), has been a topic of choice for academics in tourism-related fields, the role of migrant workers and their contribution to the tourism economy of destination countries has been largely studied from the perspective of their motivations, behaviours and experiences (e.g., Janta & Ladkin, 2009; Janta, Ladkin, Brown, & Lugosi, 2011) and the attitudes of employers (e.g., Mackenzie & Forde, 2009) The focus of this paper is on official government positions with respect to the integration of migrant workers into the host society, especially through the availability of education and training programmes for migrant workers. The role of employers and other labour market institutions such as unions in the integration efforts is only addressed tangentially.

It is acknowledged that the working and structural issues of the HoReCa sector encourage employers to resort to this cheaper labour pool, and so the availability of temporary/permanent migrant labour programmes applicable to tourism is also explored. The UN Population Division estimated the population resident outside of their countries of origin at 213.9 million in 2010 (United Nations, 2009), approximately 3.1% of the global population. Of that number, the International Labour Organization (ILO) estimated the number of migrant workers to be approximately 105 million worldwide (ILO, 2010b), roughly distributed as follows: Africa – 8.3%; Asia/Middle East – 29%; Europe/Russia – 33%; Latin America/Caribbean – 2.9%; North America – 23.8%; and Oceania – 3.4% (ILO, 2006). During the period 2000–2005, more developed regions of the world gained an estimated 2.6 million migrants annually from less developed regions, or 13.1 million over the whole period. North America gained the most from net migration: 1.4 million migrants annually. It was followed by Europe with an annual net gain of 1.1 million. The net migration rate was the highest for North America, at 4.2 migrants per 1000 inhabitants annually, with Europe recording a low 1.5 migrants per 1000 annually (WTO, 2009).

The ILO has recognised that international migration is increasingly important in today's global economy and suggests that "[n] early all countries today are affected by international migration, either as origin, transit or destination countries – and in many cases all these capacities" (ILO, 2004, p. 2). To date, a series of resolutions, conventions and policy statements have been adopted by the international community to protect the rights of migrant
workers, but these workers often remain vulnerable to exploitation, especially if they are only temporary migrants as opposed to permanent ones. Even more vulnerable are irregular migrants. The Global Commission on International Migration, set up by the United Nations Secretary-General in 2003, noted in its report that:

“To a greater or lesser extent, dual labour markets have evolved in the majority of states: a formal labour market, in which wages, working hours and other conditions of service are regulated, and an informal labour market, dominated by casual workers who do not benefit from such protection. In some parts of the world, certain sectors of the economy, including agriculture, construction, hotel and catering services, as well as domestic and sex work, have come to rely to a significant extent on migrants with irregular status, who are prepared to work in difficult, dangerous and dirty jobs with little security and low wages.” (Global Commission on International Migration, 2005, p. 36)

The UNWTO distinguishes between Migration Led Tourism (MLT) — migration for the purpose of seeking employment in the tourism industry — and Tourism Led Migration (TLM) — travel by migrants returning home for visits or receiving visits from family and friends (World Tourism Organization & European Travel Commission, 2010). The focus of this paper is confined to MLT. However, through complex and detailed work dissecting the statistics on main travel motivation, the UNWTO found that MLT can be found under each one of the “major categories of leisure, business and private” and “hypothesised that between 15 and 25% of international tourist arrivals and corresponding receipts are linked to migration events” (World Tourism Organization & European Travel Commission, 2010, p. 14).

### 2. Definitional issues

‘Labour mobility’ or ‘labour migration’ refers to the freedom of workers to practise their occupation wherever opportunities exist. Depending on the jurisdiction, workers can be referred to as migrant workers or migrants, temporary (foreign) workers or temporary migrants. When this mobility includes the crossing of a national border, this migration takes on a character of immigration, whether temporary or permanent. In these cases, workers are usually referred to as non-permanent or temporary foreign workers, temporary immigrants or guest workers, if they are regular/legal migrants. However, in some countries the lines are blurred between ‘migrants’ and ‘foreign-born workers’ who may have all the rights of native workers (Anderson, 2010). For the purposes of this paper, the term ‘migrant’ or ‘migrant worker’ is used to refer to transnational workers that seek temporary employment in another country.

However, in many countries there is also a serious phenomenon of irregular/undocumented/illegal migrants (Anderson & Ruhs, 2010), that is to say people who enter a country without the necessary documents and permits, but who are beyond the scope of this study. According to the ILO (Wickramasekera, 2000), the preferred term is ‘irregular’ as “[i]rregularities in migration can arise at various points (departure, transit, entry and return), and they may be committed against the migrant or by the migrant” (p. 2). Table 1 offers a profile for estimates of irregular migration in selected OECD countries and their relative share within the population, although it must be noted that Koser (2008) demonstrated that the complexity and ambiguity of the concept of irregular migration has implications for the collection and analysis of data (Anderson & Ruhs, 2010).

The problem of irregular migrants is most severe in the United States, and of growing concern in all South European countries, first and foremost in Greece. Quantifying migrant workers is not always an easy task, especially in Europe where member countries of the European Union (EU) do not consider workers emanating from other member countries as migrants and therefore do not track them for the most part. Indeed, the EU does not have an official definition of migration and generally uses the term to imply non-EU citizens moving into or within the EU. Certain labour mobility provisions also exist to Canada from the United States and Mexico under the NAFTA agreement as well as between Australia and New Zealand as a result of the Trans Tasman Travel Arrangement of 1973. In addition, there are a number of existing international labour mobility commitments — embodied in the Mode 4 provisions of the General Agreement on Trade in Services (GATS), upheld by the World Trade Organization, and a whole series of bilateral agreements.

Volume and structure of the tourism industry are defined on the basis of consumption generated by tourists, in contrast to production-oriented economic sectors such as agriculture or the commercial goods industry. Thus, tourism is not shown as a separate industry in national accounts. A number of countries have therefore developed satellite accounts specifically for the tourism industry, and these countries tend to have a richer information base concerning the sectors that make up this industry. Recognising the need to also enhance information on the tourism labour force, the OECD Tourism Committee has developed the OECD Employment module (OECD, 2000).

Under these circumstances, it is very difficult to obtain data for the tourism industry as a whole, and only the ‘hotel and restaurant sector’ is most cleanly captured in most national accounts. Yet even this terminology is not uniformly used either by statistical agencies in various countries or indeed in the literature. Some countries refer to ‘lodging’ or ‘accommodation’ rather than ‘hotels’, a term that may include other short stay accommodations (e.g. boarding houses, motels, tourist camps, holiday centres). Similarly, ‘restaurants’ are referred to as ‘restaurants, bars and cafés’, ‘food’, ‘food and beverage services’ or ‘catering’/‘catering and canteens’, with or without restaurants as part of the nomenclature, and can include cafeterias, snack bars, pubs, and nightclubs. Together, these two sub-sectors are sometimes referred to as ‘hospitality’, HoReCa — hotel, restaurant and catering — or ‘hotel and catering’.

### 3. Literature review

#### 3.1. Classification of countries based on migration patterns

Migration patterns differ significantly between countries and regions of the world. The focus of this paper is migration in OECD member countries, and while members are concentrated in Europe
with 23 or over two-thirds of members, they can also be found in the Americas, Asia-Pacific and the Middle East. Five different basic country group models of migration flow can be ascertained:

- **High/high**: These countries have changed their status from “outward migration” to “inward migration” in the last two decades. Longer-term members of this category are the Southern European countries, including Greece, Italy, Portugal and Spain. Especially after the 2004 enlargement of the EU, countries that did not impose any restrictions on nationals from the new members (referred to as New Member States or NMS), i.e. the UK, Ireland and Sweden (not captured in this category), saw significant increases in the number of migrants. In the first three years, over 680,000 NMS citizens arrived in the UK in what has been described as “almost certainly the largest single wave of in-migration... that the British Isles ever experienced” (Home Office, 2007). Several of the NMS countries also now fall into this category. Although out-migration, particularly to other European countries has been very high, these countries now register an important participation in the labour market by non-nationals. Thus, 14.1% of Estonia’s population is now foreign-born, an increase of 11.1% between 1995 and 2008. Similarly, Slovenia registers a foreign-born population of 10.9% and the Slovak Republic 7.3% (OECD, 2011b). Migrant workers who move to these countries usually show high employment rates but are frequently segregated in unskilled jobs. At the same time, irregular immigration is on the increase in these countries.

- **Low/low**: Both emigration and immigration are limited, and migrant workers are often employed in skilled jobs. Examples of member countries included in this category are Finland, Iceland, Japan and Korea. Sweden is somewhat of an outlier among this group since it now has a foreign-born population that represents 13.7% of its population, an increase of 3.8% between 1995 and 2008 (OECD, 2011b). This is in part due to the fact that it opened its labour market in 2004 to the NMS countries, but received only around 10,000 migrants in the first two years after enlargement (Krings, 2009), and so does not quite fall into the low/high category below.

- **High/low**: Emigration levels are high, but levels of immigration are still low with non-national workers generally employed in skilled jobs. Countries in this category include, for example, Czech Republic, Hungary, Poland, Romania, Turkey, and Egypt (which has observer status).

- **Low/high**: These are the traditional settlement countries such as Australia, Canada, and New Zealand where the foreign-born population tends to be quite significant. Most of these countries are also seeing their highest immigration levels in recent decades (OECD, 2009), in spite of the economic crisis. For instance, in Australia, the preliminary net overseas migration estimate for the 12 months ending 30 June 2009 of 298,900 was greater than for the year ending 30 June 2008 when it was 277,300. The Government of Canada also decided to maintain annual admissions of 240,000–265,000 in 2009, although there were some changes in the type of temporary migration. Israel can be included in this category since 25.5% of its population is foreign-born, although it is the only OECD country that saw a decline in its migrant population between 1995 and 2008 (OECD, 2011b).

- **Low/controlled**: This category is largely composed of Central European countries, where the presence of migrants has a long tradition, even though migration inflow has declined in more recent years. These countries temporarily (to be lifted by 30 April 2011) limited the access of NMS nationals to labour markets (Anderson, 2010). The migrant population is generally varied in terms of age, level of education and occupation. Usually, the unemployment rate of migrants is higher than that of national workers. Countries in this category include Austria, France, Germany, Netherlands, and Switzerland.

### 3.2. The need for immigrants in OECD countries

Migration across national borders has been a rising trend in OECD member countries since about the mid-1970s, but has taken on an increasing role since the mid-1990s, speeding up significantly in the mid-2000s. During the five year period from 2003 to 2007, OECD member countries experienced a period of sustained employment growth, with the creation of more than 30 million jobs (OECD, 2009). Two-thirds of these jobs were created in the OECD European countries. “In the United Kingdom for instance, employment has risen by more than 2 million since 1997, of which almost 1.5 million was accounted for by persons born abroad (71% of the total). In the United States, according to CPS data, employment increased by nearly 15 million between March 1997 and March 2007, while immigrant employment rose by 8.7 million (58% of the total).” Immigration has represented at least 40% of total employment growth in Austria, Denmark, Italy and Spain. In recent years, large labour migration flows have been especially recorded in Ireland, Portugal, and Spain (OECD, 2009, p. 15).

Annual employment growth reached 1.5% and the unemployment rate decreased from 6.5% to 5.6% during this period. Although growth was more rapid in OECD Europe at 2.5%, its unemployment rate was much higher in 2003 at 9.1% and continued to be quite high at 6.9% even with the rapid growth in employment (OECD, 2009). Ageing populations in most of the OECD countries and the concomitant declines in the working-age population exacerbated the growing labour shortages. According to Adep et al. (2008), two categories of immigrants are needed to cope with the economic and demographic imperatives: one set to do poorly paid, dirty, and dangerous jobs which nationals scorn; the other highly specialised professionals, which are in short supply.

In this context, immigrant labour has increased rapidly and in many countries has started to largely exceed its initial share in total employment, particularly in Southern European countries, Ireland and the UK. This situation is even more pronounced in the HoReCa sectors, where the share of migrant workers in employment is on the whole higher than their weight in the overall labour force (OECD, 2008), with a majority falling into the low-skills category.

The recent economic downturn put a halt to these trends in most OECD countries with labour market conditions deteriorating rapidly, particularly for migrant workers (OECD, 2009). In economies such as the United States and Japan, total employment decreased between 2007 and 2008, whereas in many other countries, unemployment rates continued to increase, reaching 7.3% in the OECD area in February 2009, up from 5.6% a year earlier. The most affected countries are Spain, where the unemployment rate reached 15.5% by February 2009, Turkey with 10.2% unemployment and Ireland with 10%.

“In Australia and Canada, employer requests for temporary workers fell by more than 50% between mid-2008 and the third quarter of 2009. Similar declines occurred in the United States where, in contrast to pre-crisis years, employers are not seeking temporary workers, because they high-skilled or low-skilled. In Europe, there is also clear evidence of less temporary labour migration, but this is dwarfed by the decline in free-movement migration, which accounted for as much as half of all migration in recent years. The number of new applicants to the UK’s Worker Registration Scheme, for example, fell 24% in 2008 and 32% in 2009. In Ireland, the comparable declines were 42% in 2008 and 60% in 2009. Switzerland and Norway both saw 30% declines in free-movement migration between 2008 and 2009.” (OECD, 2010)
Nonetheless, worsening labour market conditions were not identifiable in all countries because the labour market reacts with a lag to the short-term economic trend. However, in some countries such as Germany, the Netherlands, Poland, and Austria, for example, there was no visible impact on the unemployment rates, although there was a significant increase in part-time work, at least during the first two years of the crisis. This, too, affected foreign-born, and especially the younger age groups, more severely than native-born workers. As of 2009, the unemployment rate of the foreign-born aged 15–24 reached 15% in the United States, 20% in Canada and 24% on average in the EU (OECD, 2010).

Overall, the OECD had projected that the unemployment rate would increase further until the end 2010 to reach 10%, making this the deepest and most wide-spread recession for more than 50 years in the OECD area (OECD, 2009), severely impacting migration flows due to the decrease in demand for labour. Unfortunately, more recent partial data suggests that this was a rather optimistic projection as many countries continue to experience increases in unemployment well into 2011.

However, migration is seen as key to the longer-term recovery as well as population growth since migrants will play a critical role in filling labour and skill shortages in most OECD countries (OECD, 2010). Eurostat (2005) maintains its projections that population growth in the EU up to 2025 will be more dependent on migration. Unfortunately, the most recent data available data dates to the 2005 Eurobarometer survey on geographical and labour market mobility.

3.3. Growth of tourism and projected labour shortages

In many countries, the tourism industry has been growing faster than the economy as a whole, in spite of periodic setbacks, and worldwide, international tourist arrivals have increased about one percentage point faster than global GDP in real terms (UNWTO, 2010). Although hard hit as an economic sector by the recent economic crisis, with a 4% decline in international tourist arrivals in 2009, international tourism recovered faster than expected, registering a 7% growth in 2010. This growth is not expected to slow significantly in the foreseeable future; indeed, travel and tourism’s contribution to GDP is set to grow by 4.5% in 2011 and 4.2% per annum over the next 10 years (WTTC & Oxford Research, 2011).

While it will be more rapid in regions of the world where tourism has not been a major economic driver, the traditional tourism countries are also expected to expand their industry. However, in these countries, there is a slowdown in the growth of the labour force and a significant change in its composition, i.e. fewer young people entering the labour force and a ballooning of the senior segments (UNWTO, 2010). Therefore, as demand for labour in the tourism industry continues to grow, employers will find it increasingly difficult to find enough people.

To this must be added the problem of retaining workers in the industry. Consumer demand patterns require working conditions that are frequently characterised as unsocial and irregular working hours in the form of split shifts, weekend shifts, night shifts, or work during holiday periods are the norm (Busquets, 2010). These basic work conditions, which furthermore include many low paying, low-skilled jobs, fewer benefits and limited opportunities for advancement, have not changed to a great extent in the last 20 years (Baum, 2007). This, then, accounts for the high turnover, especially for line-level workers. Few countries actively promote careers in the sector, and its professions are not generally valorised or considered a prestigious employment option (Joppe, 2011; OECD, 2011a).

As a result, employers rely largely on marginal workers, specifically women, young people, students, ethnic minorities and migrants (Janta et al., 2011; Lucas & Mansfield, 2008). Very few countries have attempted to project labour shortages over a 10–20 year horizon. At best, the number of jobs occupied and vacant are tracked on an ongoing or periodic basis, but without projecting far into the future. Where labour shortages exist, it is clear that the current economic and financial crisis has only provided a reprieve, and that the shortages will make themselves felt again in the near future. (Joppe, 2011; OECD, 2011a).

3.4. Labour migration and the HoReCa sector

According to Münz, Straubhaar, Vadean, and Vadean (2007), the HoReCa sector is made competitive and helped to grow by immigrant labour. “Immigration contributes to long-term growth by enhancing the human capital of the receiving economy and thus innovation, productivity and its competitiveness on the international markets.” (p. 19) Without immigrants, the authors speculate that severe shortages of labour or sharp labour cost increases would result in these sectors. The ILO (2010b) expressed similar sentiments:

“Globalisation has created a link between the growing demand for labour in the tourism sector and labour migration. Labour migration, when properly governed, can help to fill labour shortages in high-skills and low-skills parts of the market, rejuvenate populations and enhance labour market efficiency, and promote entrepreneurship, dynamism, and diversity in destination and originating countries. The development of tourism products, the provision of labour and cultural enrichment are further positive results of migration. Migrant workers may bring new skills and knowledge to destination countries that could make companies more competitive, helping the country to grow” (p. 36).

The seasonal and cyclical nature of the industry makes resorting to migrant workers an almost ideal solution for many employers, as they can expand and contract their workforce as demand fluctuates. The increasing number of migrants worldwide contribute to the ease with which they can be hired on to fill the gaps in the local workforce. “Meeting labour market shortages and cost minimisation are often cited as reasons for employing migrant workers” (Janta et al., 2011, p. 1007; Mackenzie & Forde, 2009). In addition, it would appear that some employers perceive migrants as harder working than native-born workers (Densch, Hurstfield, Hill, & Akroyd, 2006; Janta et al, 2011; Lucas & Mansfield, 2008; Lyon & Sulcova, 2009), although this has been critiqued by various authors (Bauder, 2006; Mackenzie & Forde, 2009).

In spite of the glowing endorsement of migration by the ILO and the enthusiasm for their work ethic expressed by employers, the reality for the migrants themselves is not nearly as rosy. The perceived need for flexibility in the HoReCa sector has led to much greater precarity in the employment of migrants, and Anderson (2010) argues that this “has implications beyond employment pointing to an associated weakening of social relations” (p. 303). Marginal workers in general, and migrants in particular, are often willing to work for rates of pay and under conditions of employment that would not be acceptable to native-born workers (Lucas & Mansfield, 2008). This was also recognised by the ILO (2010a):

“Many migrant workers in the sector suffer from poor working and living conditions. They are paid lower wages and endure informal or casual employment services in a less safe and favourable working environment than native workers. Women in irregular status are particularly vulnerable as they are also in danger of sexual exploitation” (p. 37). Wright and Pollert (2006) documented in great detail the experience of ethnic minority and migrant workers in the HoReCa sector, highlighting the vulnerability of this marginal workforce.
Another factor contributing to this precarity is the rapid growth of temporary employment agencies, especially in the UK which today has the largest penetration of agency workers in the EU (4.2%). However, many other OECD countries have also registered considerable growth in this field, with temporary work agency employment ranging between 3 and 4% in numerous countries (Knox, 2010; McDowell, Batnitzky, & Dyer, 2008). Whereas previously, agency workers filled in for permanent workers on leave, more recently employers are hiring these workers on a longer-term basis and even to fill permanent vacancies. This allows employers to save on labour costs, effectively transferring their obligations onto the agencies who in turn, pass on these costs to workers by lowering wages and restricting access to work benefits (Evans et al., 2007). Since migrants are concentrated in low-wage/low-status sectors of the economy (Castles & Miller, 2003), where agency workers are also concentrated, McDowell et al. (2008) have found that a statistical association between migrant workers and agency workers is not surprising.

4. Research methodology

In 2010, the Tourism Committee of the OECD set out to determine good practice education and training policies and programmes that support a more attractive labour market and business environment in tourism, allowing the industry to maintain a sufficient and highly-qualified workforce, and hence support productivity improvements in the industry. A detailed survey questionnaire was sent out to the official country contact in June 2009, with a follow-up reminder prior to the September 15 due date. Since only 11 surveys had come in, another reminder was sent out towards the end of September and a further 12 surveys were received by mid-December. The following 28 countries responded to the questionnaire: Australia, Austria, Canada, Czech Republic, Egypt, Finland, France, Germany, Greece, Hungary, Ireland, Iceland, Israel, Italy, Japan, Korea, Mexico, Netherlands, New Zealand, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, and Turkey. Unfortunately, two of the more interesting countries in terms of migration – the UK and the USA – did not respond in spite of repeated reminders, and others provided only minimal information. Thus, based on the classification system of migration flows suggested in 3.2 above, respondent countries can be classified as high/high, low/low, low/high, and 5 “low/high”, and 5 “low/controlled”.

A first draft of the report was sent to the official country contacts in March 2010. Several countries provided revisions or further details. After discussions by the Tourism Committee at the June 2010 meeting, a revised draft was sent for comment in early September. Australia and Canada took the opportunity to further clarify the situation in their respective countries, after which the draft final draft was presented to the Committee at its meeting in Israel on October 21, 2010. Portugal provided revisions which were included in the final report submitted in December.

Although the questionnaire addressed the education system for hospitality and tourism, the measurement of productivity of the HoReCa sector, the state of skill and labour shortages as well as migrant labour, this paper focuses on this latter aspect. Specifically, the countries were asked to comment on the following open-ended questions:

- the number of migrant workers in tourism and trends
- the roles and impacts of migrant workers in tourism and the main challenges associated with their employment
- the availability of temporary/permanent migrant labour programmes applicable to tourism
- the availability of education and training programmes for migrant workers
- a reflection on migrant labour as the only/best solution to long-term structural labour needs in tourism

Responses represent the official position of the respective countries rather than the opinion of an individual bureaucrat. In numerous instances, country representatives also solicited the opinion of the country’s primary tourism industry association. However, caution must be exercised when attempting to compare data across countries since the sources vary greatly, impacting the accuracy, reliability and comparability of the data. For instance, as Australia pointed out, its overseas migration data is at times based on “arrival/departure card self-assessment; evaluations of particular programs (e.g. the Working Holiday Maker programme); and departmental data reflecting employer surveys and agency reporting (e.g. Trades Recognition Australia)” (personal communication, August 11, 2010).

5. Findings

5.1. Share of foreign-born workers in the HoReCa sector

In examining the number of foreign-born persons relative to the overall population in each OECD country, it is clear that a regular and systematic increase in the presence of foreigners has occurred. In most countries, their presence has grown about 1.5 to two percentage points in one decade, with a substantially higher proportion working in the HoReCa sector. The importance of labour migration to the HoReCa workforce has been noted in a number of studies over the years (e.g., Baum, 2007; Baum, Dutton, Karimi, & Kokkranikal, 2007).

As noted previously, the situation is not homogenous across member countries:

- High/high: These countries have seen a significant increase in their percentages of foreign nationals within their labour force. While Italy registered the lowest percentage at 8.1% in 2007, in Portugal the percentage of immigrant labour reached 12.5%. Similarly, Greece noted that by 2009, non-nationals represented between 12 and 13% at any given time of this workforce, up from about 11% over five years. In Spain, however, foreigners represented 14.5% of the economy as a whole in 2008, but 21.2% of the touristic sector. Of these, 75.6% were working in the HoReCa sectors, a 60% increase over five years. While 55% of foreign workers in tourism are women, in the HoReCa sector their proportion increases to 90%. Estimates for Ireland suggest that the proportion of the employees in the HoReCa sector that was non-Irish nationals in 2007 was of the order of 30%, or nearly three times the national average. Almost 60% come from the NMS countries and a further 12% from EU countries, excluding the UK. Slovenia’s foreign workers only accounted for about 1.5% of its workforce in 2006, with some 4% of them working in the HoReCa sector. By 2009, there was an almost 10-fold increase with 3365 foreign-born workers in the HoReCa sector in June 2009; however, permits are now limited to a maximum of six months within any calendar year.

- Low/low: As noted in Section 3.1 above, immigration is limited in these countries, although here, too, numbers have been on the rise. According to the Finnish Employment and Economic Offices, for instance, 1280 permits of residence were granted to workers in the restaurant sector, roughly 10% of all foreign worker permits. Denmark and Norway’s foreign-born workforce were both relatively low in 2007 at 6.6% and 8.4%, respectively, with the equivalent shares in the HoReCa sector at
In Sweden, the last available statistics date to 2008, when 13.7% of the workforce was foreign-born, up from 11.2% only 2 years previously. Unfortunately, no information was available for the HoReCa sector. As Krings (2009) ascertained, the impact of migration from the 2004 EU enlargement was minor on Sweden, but in absolute terms only. In relative terms, the workforce is changing rapidly. Iceland has seen an almost exponential increase in the number of foreign workers from a total of 1630 in 1998 to 18 000 by 2008, representing about 10% of its workforce. In countries such as Korea and Japan, migration is so minimal that no work has been done in the area.

- **High/low:** In these countries, the overall percentage of foreigners in the HoReCa sector ranges from a low in Hungary of 3.6% in 2007 to a high of 61.1% for the Czech Republic. A large portion of these migrants originates in neighbouring countries such as Russia, Belarus, Slovakia, the Ukraine, and Moldova. Indeed, Poland has specific legislation that facilitates access to the labour market from these countries, since its high out-migration is impacting its own HoReCa sector. Similarly, Romania has seen such a significant out-migration, especially since 2000 towards southern European countries, that labour shortages are also slowly making themselves felt. So while only about 1% of employers have considered bringing in foreign workers to date, a survey conducted in 2007 (Serban & Toth, 2007) suggested that 7% of employers are considering bringing in foreign labour in the future, especially bringing back Romanians working abroad. Mexico does not collect any statistics regarding migration.

- **Low/high:** Only two of the traditional settlement countries provided extensive information on their situation, since Israel has not given migration much thought, although it suggests that illegal migration is becoming a problem, and New Zealand's availability of statistics is sporadic — with 2006 the last year available. At that time, foreign-born labour represented 23.8% of its workforce. This is only slightly less than for Australia, which had 25.2% foreign labour in the economy and 29.7% in the HoReCa sector that same year, increasing to 25.8% and 29.9%, respectively, in 2007. However, these numbers do not provide a complete reflection of the situation. There are other programmes available, such as the Working Holiday Makers (WHM), a temporary migration mechanism to allow young people from nominated nations to travel, work and study in Australia. According to an evaluation report of the WHM (Tan, Lester, Bai, & Sun, 2009), there were 9317 jobs in the HoReCa sector (defined as “accommodation and food services” which includes accommodation, café, restaurants, take away, pub, tavern, bar and club), or 32.7% of all WHM who worked during their stay in Australia. In addition, Australia also administers skilled migration arrangements that have an occupation rather than an industry focus. No evidence of labour market testing is required for employer sponsorship for the temporary business (subclass 457 — Business [long-stay]) arrangement. This visa programme allows approved employers to sponsor nominated skilled workers — specifically restaurant and catering manager, hotel manager, club manager, travel agency manager, chef and trade qualified cook positions. The number of primary applications granted in 2008–09 to 30 June 2009 to the HoReCa sector as a sponsor was 5% of all visas granted.

The Canadian Tourism Human Resource Council’s labour market research shows that 23.7% of all tourism industry employees were born outside of Canada (i.e., permanent and non-permanent residents). In 2007, tourism employers received permission from the federal government to fill approximately 17 250 Temporary Foreign Worker (TFW) positions (Table 2). This represents just over 1% of the tourism workforce. The worsening labour shortage saw this number more than double in 2008 to 36 700 positions, but with the onset of the economic crisis, the number of TFWs decreased to approximately 15 700 in 2009.

- **Low/controlled:** The Central European countries have traditionally had fairly high percentages of foreign workers fuelling their economies. Thus, in Austria's national economy, 12.7% of the employees did not hold Austrian citizenship in 2008 compared to 33.9% in the HoReCa sector. Just over 14% of all working immigrants are working in the tourism sector. Switzerland is facing a similar situation with significant increases in migrant workers since the agreement on the free movement of persons between Switzerland and the EU came into force in June 2002. The proportion of foreigners is the highest in the Swiss economy with about 32% of the workforce. According to the Centre d’Analyse Stratégique, the non-resident percentage of workers in the French HoReCa sector was about 13% in 2005 whereas Eurostat (2008, cited by OECD, 2009) put their share at 6.9% in 2007. Unfortunately, the German Federal Statistical Office does not track statistical data on gainful employment broken down by sector, although the proportion of migrants living in Germany in 2007 was estimated at 19% of the total German population.

### Table 2

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<tr>
<th>Year</th>
<th>Accommodations</th>
<th>Food and beverage services</th>
<th>Recreation and entertainment</th>
<th>Transportation</th>
<th>Travel services</th>
<th>Tourism sector</th>
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Source: HRSDC, Customised cross tabulation of the number of TFW positions on Labour Market Opinion applications received in each quarter by occupation, “tourism industry group”, and decision status on 28 May 2010.

### 5.2. Issues facing migrant workers

One of the most profound issues facing immigrants relates to the higher than average unemployment rate, during economic buoyant times and made worse during years of economic crisis (see the OECD’s annual reports on migration which provide a historic tracking of the situation) although the situation varies often greatly depending upon the country of origin. Respondent countries suggested fairly unanimously that unemployment is often linked to language barriers, educational attainment, skill levels, as well as sectors that are highly vulnerable to changes in the economic landscape. Eurostat data also reveal that migrants usually have worse employment prospects than nationals, especially for non-EU25 citizens. As a case in point, immigrants in Canada in 2006 were significantly more likely to have a university education than the Canadian-born population aged 25–54 yet their unemployment rate at 11.4% was four times that of Canadian-born workers with similar education levels (Statistics Canada, 2007, September 10). A recent study (Thomas, 2010) about the characteristics of foreign nationals working temporarily in Canada points to the issue of lower earnings among non-permanent resident workers when compared to Canadian-born workers and established permanent immigrants. Some other specific situations include Austria, where according to the tourism industry, foreign workers are particularly required for those jobs that cannot be covered by Austrian citizens, but
which also means that generally these migrant workers have lower qualifications (education and training) and experience worse working conditions and wages than migrants in other branches. Aside from language issues which are particularly severe in a sector that relies on guest–employee interaction, France believes that challenges include access to housing in tourism zones, since real estate pressures are severe, and access to training since many of the migrant workers are likely in irregular work situations. Ireland shares many of these concerns as expressed by Austria and France, but has also come to realise that customer perception of the Irish welcome, and hence one of the big attractors and differentiators of its tourism product, is being undermined by migrant front line workers, due to cultural differences and a general lack of customer service orientation and knowledge of the Irish product. This has also been ascertained in a study by Devine, Baum, Hearns, and Devine (2007; Baum, Hearns, & Devine, 2008).

Any of the member countries that have signed on to international commitments concerning labour standards and protection covering salary, superannuation, workers compensation, occupational health and safety, officially protect migrants to the same extent as domestic workers. However, several respondent countries acknowledge that they are aware of illegal migrants being exploited, especially in some ethnic restaurants in larger cities, and that the HoReCa sector has a higher incidence of employing illegal migrants than other economic sectors. In spite of this awareness, Ruhs (2006) points to the poor record of enforcement of sanctions against employers in liberal and democratic countries that is seen as the most important factor in perpetuating irregular immigration, and ultimately the failure of labour immigration policies.

5.3. Strategies to address labour migration

All of the low/high or traditional settlement countries have specific migrant labour programmes and/or are developing extensive strategies to address temporary foreign workers and/or permanent migration, the approval processes required and their integration into the host society. However, Ruhs (2006) points out that all too often these types of programmes fail to achieve their intended policy objectives, to protect the employment conditions of migrants, and lead to labour market distortions and the growth of structural dependence on the employment of migrant workers in certain industries, such as the HoReCa sector.

New Zealand has two migrant labour programmes applicable to tourism. The first is a working holiday scheme visa (WHS) allowing limited work opportunities for visitors to help finance a working holiday. The other is a temporary migrant worker scheme requiring employment to be pre-arranged with an employer prior to arrival in New Zealand. As noted above, Australia also has programmes very similar to those in New Zealand, but in addition offers a suite of non-sponsored temporary migration arrangements that provide an opportunity for temporary work to supplement income, including for international students. Student visa holders, once they have commenced a course of study in Australia, can work up to 20 h per week while their course is in session and full-time during scheduled course breaks. Student labour is particularly popular with the HoReCa sector. This is also true for Canada, which provides the additional opportunity of working after graduation for the length of the study program, up to a maximum of three years.

The Action Plan for Faster Immigration, introduced by the Government of Canada in 2008, enables immigration officers to undertake priority processing of immigration applications that respond to pan-Canadian immigration goals. Currently, Federal Skilled Worker (permanent immigration) applicants who have an offer of arranged employment or can demonstrate at least one year of paid work experience in one or more of 29 occupations – including Restaurant and Food Service Managers, Chefs, and Cooks – identified as being in high demand nationally are eligible for priority processing. Aside from facilitating permanent residency, Canada enables the entry of temporary foreign workers to Canada to meet the short-term labour and skills needs of employers who are unable to find suitable Canadians or permanent residents. Of particular interest to the HoReCa sector is also the international youth exchange programmes that bring in close to 36 000 young men and women from approximately 40 countries every year. These mobility programmes include the Student Work Abroad Program (SWAP), Working Holidays, Young Workers’ Exchange Programs, and Co-op Education Programs. Many tourism employers have recruited staff, especially for seasonal positions (e.g. ski resorts), using youth mobility programmes.

For Slovenia, a high/high country, the issue of labour and skills shortages is more recent and so its Ministry of Labour, Family and Social Affairs has only now prepared an Economic Migration Strategy, which identifies a shortage of appropriate human resources in the HoReCa sectors, especially cooks and waiters with vocational professional education, among others. Its action plan outlines a broad range of measures for the promotion of immigration adjusted to demand of the labour market, simplification and unification of procedures for admission of third country citizens for the purpose of work and employment, and promotion of higher labour force mobility.

According to Ruhs (2006), a number of high-income countries are considering adopting temporary migration programs. He mentions specifically the United States, which is looking to introduce a large-scale guest-worker programme for Mexican workers and the UK which introduced a new pilot scheme for the temporary employment of migrant workers in selected low-skill occupations in hospitality and food processing. Unfortunately, neither of these countries responded to the survey. Ruhs also suggests that Italy and Spain are actively pursuing these types of arrangements, but neither country addressed this possibility in their survey response.

5.4. Programmes to assist migrants with integration into the host society

Several countries highlighted programmes offered by the industry and/or trade unions to assist migrants in acquiring particularly language abilities (e.g. Austria, Iceland, Slovenia) and skills to carry out the work required (e.g. Austria, Czech Republic, Ireland, Slovenia).

Although the government is more or less active in a number of OECD member countries, only a few have tourism-specific programmes. By far the most comprehensive approach has been taken in Ireland. The “Celtic Tiger” years of rapid economic expansion in Ireland also saw an explosion in the number of work permit applications, from 6250 in 1999 to 50,000 by 2004, changing a nearly homogenous population into a multicultural society (Faítle Ireland, 2005, p. 8). About 40% of these migrants were employed in the HoReCa sector, bringing the share of non-Irish nationals in the sector to 17%. As a result, Faítle Ireland was tasked, in consultation with the professional representative bodies, to develop and implement a strategy and detailed implementation programme to provide for the integration of culturally diverse employees within the workforce and more widely, into Irish society. The resultant strategy and implementation plan aim to ensure that people working in tourism in Ireland operate to the highest international standards of professionalism and that the positive experience of tourists with the people they meet in Ireland is maintained and enhanced. Recognising that there is much diversity among immigrant groups with differing cultural and religious traditions, these documents lay out plans for the integration of non-national employees within the workplace and more widely into Irish
society in a way that recognises and supports cultural diversity and enhances their personal and professional development and their potential to add a new and valuable dimension to traditional Irish tourism values. Based on research and focus groups with employers and migrants, the strategy clearly defines the role of all stakeholders in the tourism industry (enterprises and representative bodies, education and training providers, and public sector bodies with a role in tourism education and training) and lays out specific actions and desired outcomes (Fáilte Ireland, 2005, p. 19).

Far more limited approaches can be found in countries such as Austria and Iceland. The Austrian public employment service offers language courses, e.g. if a certain job demands language skills in German, and – specific to the tourism industry – offers a wide range on educational programmes and trainings like sommelier courses, serving guests professionally, creativity in tourism, concierge trainings, etc. Iceland’s approach is even more arm’s length. The Vocational Training Council provides grants to support the cost of preparing and holding study programmes, which includes courses in the tourism sector, particularly language programmes.

While there is no national programme specific to tourism in Canada, in an effort to assist migrants with integration into society, the Canadian Tourism Human Resource Council has developed an initiative whereby potential workers from selected countries have access to the ‘emerit’ occupational training and associated on-line exams. By demonstrating to their prospective employer their commitment to the sector, and that they have mastered all the competencies needed to successfully perform their job based on nationally-recognised industry-defined standards, it is possible to fast-track workers’ transition from temporary to permanent status through employer sponsorship as part of the Provincial Nominee Programme.

Since the HoReCa sector is generally characterised as weakly unionised (Knox, 2010), their limited involvement in efforts to integrate migrants in this sector should not be a surprise. However, given the significant concentration of migrants in the sector and the general recognition that many of them are exploited, one could expect government agencies to play a more active role in providing assistance and training. Anderson (2010) points out that in most liberal democracies length of stay has implications for rights based claims and, based on Ruhs and Martin’s (2008) discussion of the rights of migrants in guest-worker programmes, concludes that the reformulation of guest-worker schemes is an attempt by states to enforce temporariness and thus limit their opportunity for such claims. It begs the question whether similar considerations do not also explain the lack of efforts made to assist migrants with integration in all but the traditional settlement countries which are generally not opposed to seeing migrants become permanent residents.

5.5. Migrants as a solution to labour issues

Countries see resorting to migrant workers as a temporary solution at best and as undesirable at worst. The exception are the traditional settlement countries (low/high), long reliant on immigration to grow their economies and where there are any number of targeted temporary worker programmes to address endemic and acute labour and skills shortages.

New Zealand believes temporary migration is a good tool to help manage labour shortages since it is flexible and the numbers of migrant visas granted can be adjusted to suit local labour market and economic conditions. Canada is also cautiously supportive but believes that a multi-pronged approach is needed to address structural labour needs over both the short- and long-term. This approach includes promoting an efficient labour market through streamlined (permanent) immigration programmes and a common framework for qualification recognition facilitating labour mobility, as well as fostering an inclusive labour force by enhancing the participation of under-represented groups (e.g. Aboriginal Canadians, youth, older workers, persons with disabilities) and workers in transition. Finally, programmes supporting the development of a skilled workforce will address key challenges regarding productivity.

The low/low and high/low countries are most opposed to migrant workers as a solution, and believe that improving the image of tourism-related jobs as a career choice would ensure that there are sufficient workers in the national economy. They do, however, recognise that migrant workers should at least be provided with basic professional education or retraining. It is interesting that countries whose populations have been emigrating in large numbers, largely to fill temporary positions in sectors such as HoReCa, and have benefitted from the remittances that these workers generate, should be opposed to migration into their own countries.

Most of the southern European (high/high) countries do not seem to have given much thought to migrant workers and the challenges they encounter, in spite of the growing problem of undeclared labour including clandestine employment of foreign workers in irregular status. Ireland, on the other hand, has come to realise the importance for visitors to be met and engaged with local Irish people and their culture, and feels strongly that long-term labour has to be local and indigenous.

Although not conditioned as a solution, the Central European (low/controlled) countries recognise that the HoReCa sector is heavily reliant on migrant workers, since they are largely a cheap labour force, often in irregular situations, and willing to take on jobs that the resident population spurns. Clearly, in specialised ethnic restaurants, the domestic labour market may be unable to meet the need, and the seasonal aspect of many businesses makes them dependent on a flexible workforce. Here, too, the solution to managing structural labour needs is seen as better engaging the industry as a whole to change working conditions and improve the image of its sectors. However, some countries, such as Switzerland, realise that immigration is an important solution to fulfilling industry needs over the long term.

While the official position may not be support for temporary migration, there would appear to be tacit complicity between the governments and the tourism industry whose primary interest is profit maximisation in a highly competitive, labour-intensive sector where profit margins are low. It is in the state’s interest that tourism should grow, even if it is through granting access to a workforce with few rights and willing to accept the less than ideal employment conditions of the HoReCa sector. A number of authors have pointed out the advantages to both state and employer of hiring migrant workers, especially Piore (1979), Rodriguez (2004), Ruhs and Martin (2008), and Mackenzie and Forde (2009).

6. Conclusions

The labour intensity as well as the manner and conditions in which tourism services are delivered is putting a significant strain on businesses to attract a skilled workforce, and even more to retain and develop them over the long term. At the same time, intensive competition is encouraging employers to reduce the burden of labour costs. Impending labour and skills shortages in most developed countries will aggravate this situation further: they will encourage employers to look for workers that have lower pay expectations and possibly lesser skills both domestically and abroad to the detriment of the quality of the experience being delivered. According to the ILO
“the sector often crosses the fluid boundaries between the informal economy and the formal economy, with a number of formal establishments offering black market jobs” (p. 13). To minimise labour costs even further, numerous employers are now resorting to temporary employment agencies to bring in migrants, putting these in an increasingly precarious situation and open to abuse (Evans et al., 2007; Knox, 2010).

Since the definition of migrant worker in the EU excludes any workers from its members, most countries do not appear to have a good grasp of exactly how many workers from other countries are working in theirs. Although there is a recognition that migrants, both temporary and permanent, often encounter rather severe barriers to integration, not least due to language problems, very few countries have developed any kind of measures to assist them and Ireland is the only country to have produced an in-depth strategy and implementation engaging employers, workers, educational institutions and the public sector active in the broader tourism industry that addresses cultural diversity and integration.

No country condones illegal migration and all will resort to fines and litigation against employers that exploit workers and/or employ illegal migrants. However, the reality appears to be that “[l]iberal and democratic host countries have a particularly poor record of enforcing the law against employers who illegally employ migrant workers” (Juhás, 2006, p. 16). This in spite of the fact that probably all host countries recognise and support the need for an adaptable and flexible labour market that also is committed to fairness in the treatment of its workforce, whether native born, permanent immigrants or migrant workers.

While host countries prefer to bring in highly skilled migrants, the need to fill low-skilled positions – positions often shunned by native-born workers due to pay and working conditions – is becoming more acute. Most recognise that structural challenges and the seasonal fluctuations in tourism will continue to encourage operators to resort to cheaper migrant workers, particularly for entry level positions, both legally and illegally. In spite of a lack of precise numbers, countries are aware where migrant workers are concentrated geographically in their countries and could therefore provide far more assistance and programmes to help them integrate into the host society, ensure that labour legislation is respected, and provide training and education programmes aimed specifically at migrants. While not easy to do, there is a need for the state to engage both employers and unions in this process, and Wright and Pollert (2006) propose a series of support, advice and other assistance required by cultural group to develop relevant programmes and engage employers and unions appropriately.

To date, unions have played a relatively minor role since the sector is generally characterised as weakly unionised, except for some larger workplaces (Knox, 2010; Wright & Pollert, 2006). This is in some measure due to the difficulty of organising workplaces that are relatively small with high turnover rates and employers who are hostile to unions (Wright & Pollert, 2006). But it must also be remembered that unions are not always supportive of migrants: concerned with the preservation of labour standards, some unions tend to oppose the free movement of labour (Krians, 2009).

Employers, on the other hand, have little to gain by becoming engaged: as long as temporary migration programmes give them almost complete control over migrant workers, they are assured a compliant and loyal workforce. This addresses two of their top concerns, namely the need for flexibility and retention of the workers. At the same time, they can often pay less than for native workers and curtail their rights (Anderson, 2010).

One of the problems in the tourism industry is that there is a lack of integration of migrants into the host community. For all other countries, migrant labour is seen at best a short-term solution and at most a seasonal phenomenon. It is unfortunate that neither the US nor the UK chose not to respond to the survey, since both are struggling with high levels of migrants, legal and illegal, and have overhauled their immigration policies to deal with the issue. Their insights would have undoubtedly provided a useful addition to the discussion.

Another limitation of the study stems from the fact that the responses reflect the official position of the given country but do not address any policy objectives and it is therefore dangerous to impute any motives to the respective state, even when the academic literature suggests what the underlying considerations might be. Lastly, although the survey was undertaken at a time when most member countries were still deeply affected by the economic crisis, none were able to provide consolidated data that was more recent than 2007. Some countries were able to supplement this information with permit application numbers as recent as 2009. What data was provided must be treated with caution since sources and definitions vary greatly.

7. Implications

Many of the OECD members countries are confronted with demographic realities that will force them to rely ever more heavily on migrant workers, economic slumps not withstanding. To an even greater degree, it is clear that the issue of migrants in the HoReCa sector will intensify as labour and skills shortages make themselves felt again as the economies of the Western world recover from the financial crisis and start expanding once more. Even those OECD member countries that to date have largely ignored the challenges and (ab)use within the industry that migrants face will not be able to continue to do so for much longer. Liberal and democratic countries are committed to fairness in the treatment of its workforce and calls for increased rights and fairness for migrant workers are becoming louder (ILO, 2010b, 2010c).

Thus, it is urgent that countries improve their ability to measure migration patterns, country of origins, qualifications, training needs and other assistance required by cultural group to develop relevant programmes and engage employers and unions appropriately.

While a considerable number of countries have developed a Tourism Satellite Account to obtain much better data on the economic contributions of the various sub-components of the tourism industry, very few have taken the next step and added a human resource module. It is urgent that countries do so to get a better sense of the make-up of the labour force, including the role played by migrant workers, to be able to track changes over time, and determine the effectiveness of policy initiatives and programmes.

Another consideration is moving to a system of occupational norms and standards that can assist with putting in place an accreditation programme for competencies acquired through work experience, and that would also be accepted by educational institutions and thus smooth the path for increased professional credentials for workers in the industry, including migrants. This is, of course, the concept behind the ‘European Qualification and Skills’ Passport’, approved in 2007. While this is undoubtedly an important step in ensuring quality enhancement of the labour force, it must be recognised that in the tourism industry i) few professions require certification of any kind; ii) pay and promotion have a tenuous link with credentials; iii) few occupations have set educational requirements for employment; and iv) many graduates from non-tourism programs are hired into tourism occupations without any prior exposure to the industry.

Ultimately, many of the solutions depend on enhanced awareness of the industry and its career opportunities. Indeed, those countries where a distinct effort has been made – through awareness
campaigns, career opportunity websites or exposure to the work world of school age youth by including vocational subjects, technological specialisations and paid/unpaid internships/on-the-job training – have noticed an improvement in attitudes towards the HoReCa sectors and their appeal as a career choice (Joppe, 2011).

Underpinning any of these efforts is, however, a more fundamental change in how migrants are viewed by the state, the restrictions each one places on temporary work arrangements, and the extent to which undocumented migration is not condoned. Since the political imperative in most high-income countries tends to be to minimise the fiscal costs associated with low-skilled immigration, made worse by the public debt many have accumulated during the financial crisis, they will either try to keep migrant numbers low or restrict migrants’ access to the social welfare system (Ruhs & Martin, 2008). But, as Carens (2007) points out, restricting the rights of migrants is always morally problematic “because they violate the state’s own understanding of morally acceptable conditions of employment” (p. 4).

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