



Reducing Unemployment by 422,000 through Global Job Opportunities : Expanding Indonesia's Overseas Workers Industry to Enhance Economic Advancements

Overview

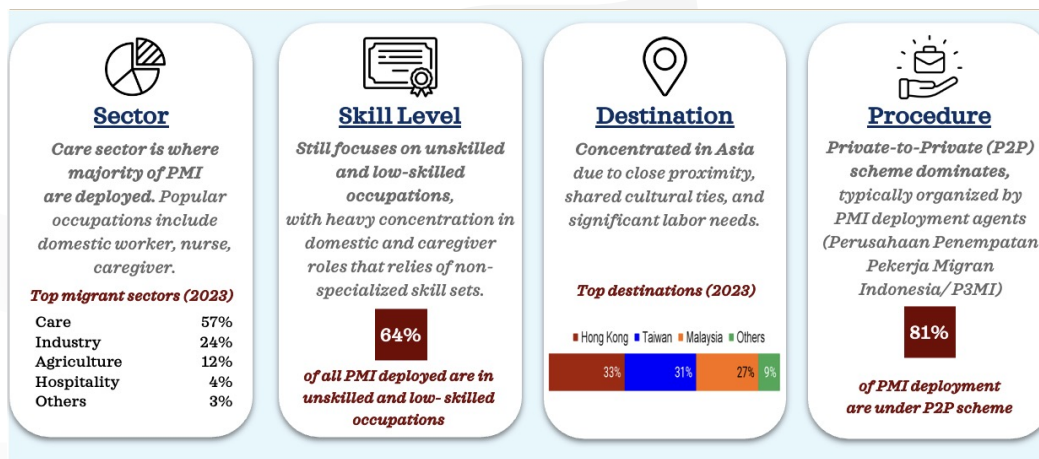
How can Indonesia capitalize on global labor opportunities through its demographic bonus to enhance broader socioeconomic outcomes? As Indonesia enters 2025, the country faces the challenge of 7.47 million unemployed and 11.56 million underemployed individuals, along with intensifying cost-efficiency pressures and corporate downsizing—trends that could further strain the domestic labor market. At the same time, there is a growing global demand for low- and medium-skilled labor. Industries such as caregiving, welding, and hospitality are estimated to suffer a shortage of 690,000 workers in 2024, presenting a significant revenue opportunity for Indonesia.

Indonesia's workforce represents a "hidden asset" capable of meeting international labor demands while driving the nation's socioeconomic progress. By strategically leveraging this potential, Indonesia could significantly increase annual remittances—currently surpassing \$14 billion—, reduce unemployment, and enhance workforce capabilities through well-designed upskilling initiatives.

This policy brief highlights strategies to expand Indonesia's overseas workforce industry, fostering substantial economic growth at national, regional, and individual levels. It emphasizes the untapped potential of low- and medium-skilled PMIs (Indonesian migrant workers), advocating for a paradigm shift in their perception—from unskilled labor to valuable contributors. The government plays a critical role in streamlining policies and unlocking overseas employment opportunities, while the private sector is pivotal in preparing the workforce. Together, these efforts position Indonesia as a key player in the global labor market.

The Strengths of Indonesian Migrant Workers and Status of the Industry

Indonesian migrant workers (PMIs) are recognized on the global stage, with foreign employers commending their strong work ethic, diligence, and reliability. Their flexibility in various roles allows them to adapt seamlessly to fast-changing industries and multicultural environments. Moreover, the positive attitude and genuine willingness to serve exhibited by PMIs further enhance their appeal to employers. As a result, Indonesian migrant workers play a vital role in meeting labor demands internationally.



Economic Opportunities Through the Growth of the Overseas Worker Industry

The presence of PMIs directly correlates with global economic trends, evidenced by the relationship between global GDP growth and remittance flows. For instance, a 1% increase in global GDP corresponds to a 2.46% uptick in the number of PMIs deployed and subsequently their remittance transfers, underscoring the economic importance of migrant labor. In 2023 alone, remittance inflows to Indonesia totaled \$14.2 billion—equivalent to 45% of the GDP contribution from the real estate sector and 26% from financial and insurance activities.

As global labor shortages widen, abundant job opportunities abroad arise, presenting Indonesia with the chance to mitigate its current unemployment challenges. Notable examples include Japan and Germany, which in respectively face shortages of 250,000 and 17,656 caregivers in 2024. In the same year, Japan requires 195,000 welders, Australia needs 70,000 welders, and the UAE and Saudi Arabia together lack 82,000 hotel staff. In the horticulture sector, South Korea, Japan, and Australia report shortages of 14,000, 36,500, and 26,000 workers, respectively. These labor shortages create significant opportunities for PMI to prepare themselves and help bridge the global workforce gap.

Even at present, the impact of PMI deployments on reducing unemployment is noteworthy. Our analysis reveals that PMI contributes to an annual reduction in Indonesia's unemployment rate of 0.21 percentage points, translating to approximately 328,000 fewer unemployed individuals for each year between 2025-2029. Furthermore,

if Indonesia can aggressively increase its migrant deployments by 30%, the reduction in unemployment is even higher at 0.28 percentage points, or 422,000 fewer unemployed individuals.

This represents almost half of Indonesia's unemployment reduction progress between 2016 to 2024, where the country only managed to reduce its unemployment rate by 0.7 percentage points (from 5.61% to 4.91%). This illustrates that PMIs not only fill global labor market gaps but also facilitate the creation of additional job opportunities.

Strengthening Indonesia's Overseas Workers Industry for Enhanced Economic Impact

The global demand for PMIs is on the rise, with deployment numbers increasing from 277,493 in 2019 to 297,434 in 2024, reflecting a compound annual growth rate (CAGR) of 1.40%. This growth results in a cumulative total of 1,258,074 PMIs deployed during this period. However, despite this upward trend, the contribution of remittances to Indonesia's GDP stagnated at just 1.04%. In contrast, countries like India and Vietnam enjoy remittance contributions to GDP of 3.3% and 4.6%, respectively. This disparity underscores the urgent need for targeted strategies that maximize the economic impact of remittances generated by our overseas workers. A focused and strategic approach is crucial to empower PMI to meet global labor demands, enhance their competitive edge, and significantly boost their economic contributions to Indonesia.

Currently, the majority of Indonesian migrant workers are employed in unskilled and low-skilled job roles, with a heavy concentration in domestic workers. This reliance on minimally specialized skills highlights the pressing need for upskilling initiatives aimed at transitioning workers into low and medium-skilled professions. By pursuing such strategies, the potential for salary increases could be substantial, subsequently enhancing national remittances. For instance, if Indonesia successfully upskills 25% of its unskilled PMIs (mostly domestic workers and factory workers) and places them in low to medium-skilled positions—such as caregivers, welders, or horticultural workers— while maintaining the current growth in migrant deployments, the nation could see remittance inflows rise by up to 58%, rising from \$14.2 billion in 2023 to \$22.4 billion by 2029, eventually reaching to \$48.0 billion by 2040.

To optimize the economic contributions of PMI, it is crucial to foster enhanced collaboration and active engagement among the public sector, private sector, and all relevant stakeholders. However, Indonesia encounters several internal challenges that impede its capacity to effectively deploy skilled migrant workers. Addressing these obstacles is essential to unlocking the full potential of Indonesia's overseas workers industry, ultimately driving significant positive impacts on the national economy.

Mapping the Most Impactful and Most Discussed Challenges

This policy brief identifies two primary challenges to deploying skilled migrant workers: Administrative and Bureaucratic Challenges, and Capacity Challenges. Throughout their deployment cycles, PMIs encounter varying degrees of obstacles. Certain challenges are particularly significant, and if not addressed, they could hinder Indonesia's ability to effectively deploy high-quality PMI.

Through an extensive literature review, research, analysis, and numerous interviews with industry stakeholders, IBC evaluated the prevailing issues and discourse surrounding the PMI industry. This process led to the identification of priority challenges that necessitate targeted interventions from all relevant stakeholders to ensure the successful expansion of Indonesia's overseas workers industry.

Administrative and Bureaucracy Barriers

Several challenges impact the efficiency and effectiveness of the overseas worker industry. This section elaborates further on three primary administrative and bureaucratic issues that need urgent attention: clarifying skill-based job classifications, resolving conflicts of interest in governance, and streamlining cumbersome bureaucratic procedures. Tackling these challenges is crucial for enhancing the preparation, deployment, and overall success of migrant workers.

PMI Occupations are Not Classified by Skill Levels and are Listed in Overlapping Categories

While the emphasis on protecting PMIs, especially those in vulnerable unskilled categories such as domestic workers, is essential, it is equally important to focus on enhancing the skills of migrants to prepare them for success in low- to medium-skilled occupations. However, the government lacked any skill-based classification for migrant occupations. The current classification system for migrant workers in Indonesia is predominantly based on administrative criteria, such as deployment methods and placement types, rather than on skill levels, education, and specific job requirements. This oversight diminishes the importance of skills and qualifications, creating confusion due to overlapping categories within the government framework. For example, classifications by the

Ministry of P2MI (Ministry of Migrant Worker Protection) include terms like “Housemaid,” “Domestic Worker,” “Worker,” and “General Worker.” These terms lack standardized descriptions of roles and requisite skills, leading to significant ambiguity. As a result, these overlapping definitions provide an obstacle to the government from providing accurate data and policy prescriptions to aid with migrant upskilling.

Moreover, Indonesia’s classification of Migrant Workers is misaligned with international frameworks established by organizations such as the International Labour Organization (ILO), the Organisation for Economic Co-operation and Development (OECD), and the International Organization for Migration (IOM). These organizations emphasize the importance of skills, education, and well-defined job roles, which are essential for improving global compatibility and competitiveness. The existing system, if unaddressed, may continue to impede the growth and potential contributions of Indonesia’s overseas workers industry.

Conflict of Interest from Government’s Dual Role

The government’s dual role as both regulator and operator in the deployment of migrant workers, arising from previous practices under BP2MI (Migrant Workers Protection Board), raises significant concerns about fairness and neutrality. Although government-to-government (G2G) programs currently account for only about 3.8% of migrant worker placements, this does not mitigate the inherent conflict of interest. By regulating private agencies while competing with them, the government undermines trust and reduces the perceived independence of regulatory oversight. This dual role compromises regulatory neutrality and creates an uneven playing field for private agencies, potentially leading to biases in enforcement. The resulting lack of trust and transparency threatens the integrity of the entire system. Furthermore, operating deployments takes away resources from the government that can instead be focused on producing regulations that incentivizes migrant deployments as well as nationwide policies (e.g degree recognition and certification alignments with destination countries) that prepares potential Indonesian migrants better for deployment.

Bureaucratic Delays and Administrative Hurdles

The deployment of PMIs often face delays due to subjective and inconsistent permit processes managed by labor attachés. Despite compliance from agencies, approvals are frequently stalled over minor administrative details, such as formatting or submission timing.

At the local level, administrative hurdles, such as mismatches in names or marital status on identification documents (e.g. KTP), require workers to return to their hometowns to correct their records. Once there, they often encounter informal fees requested by various local authorities, including neighborhood leaders (ketua rumah tangga) and sub-district heads (camat), which adds further complications and costs.

These inefficiencies lead to unnecessary expenses, prolonged processing times, and delayed worker placements, ultimately diminishing opportunities for PMIs and undermining Indonesia’s competitiveness in the global market.



Capacity Barriers

The quality of PMIs largely influences their acceptance abroad, depending on their education and skill levels. According to BPS (2024), most PMIs deployed overseas work in unskilled or low-skilled jobs, with domestic work being the most common. Despite Indonesia's potential to send more skilled PMIs for higher-quality jobs that could enhance their families' welfare, several challenges hinder this development. Three key issues obstruct education and skill development. A notable competency gap exists due to a lack of training programs aligned with the standards of destination countries. Additionally, insufficient language proficiency limits access to markets, while limited mental resilience—affected by homesickness and isolation—further hinders adaptability.

Competency Gap

PMIs face a persistent competency gap due to several key issues. First, there is a shortage of LPKs (Workforce Preparation Training Centers) that provide technical training tailored for the increasingly in-demand medium-skilled jobs. Second, certification bodies like the Badan Nasional Sertifikasi Profesi (BNSP) have become less relevant for global recruitment, as they do not meet international standards. For instance, in caregiving roles, vocational and diploma (SMK/D3) curricula lack a specific focus on caregiving skills compared to bachelor's (S1) programs. This leaves SMK/D3 graduates at a disadvantage and necessitates additional skill development.

Inadequate Language Proficiency

Insufficient language proficiency limits PMIs access to potential markets, particularly in countries with strict language requirements. Unfortunately, PMIs' language proficiency in both English and non-English-speaking countries remains minimal. Indonesia's English Proficiency Index lags behind countries like the Philippines, Vietnam, and India, which undermines the competitiveness of PMIs in English-speaking markets. Although Indonesia has established a National Work Competency Standard (SKKNI) to address language barriers, this standard does not meet the requirements of destination countries, with PMIs sometimes encountering certain conversational situations that are not a part of their training while also being unprepared to comprehend local dialects, therefore hindering effective communication. Additionally, while there is promising demand for migrant workers in non-English-speaking countries, inadequate nationwide language training capacity (and the inherently long duration their language training requires) will make scaling up deployments more difficult.

Limited Mental Resilience

Some PMIs opt to cut their contract early due to feeling unhappy with their work. Interviews with former PMIs attribute this to the fact that the mental readiness of PMIs often falls short, affecting their job performance and overall well-being. Many experience homesickness, which can hinder productivity. For instance, PMIs who are caregivers may find themselves challenged by the emotional demands of attending to the elderly and performing unpleasant tasks, such as cleaning bodily waste. Furthermore, PMIs working on plantations are frequently placed in isolated dormitories to prevent conflicts, which can lead to feelings of loneliness. Additionally, difficulties in financial management may lead some PMIs to spend their earnings on unhelpful activities, like gambling. These challenges highlight the need for robust mental preparation and support systems for PMIs to enhance their resilience and well-being. Part of these issues stem from a lack of awareness before deployment, such as not realizing the long hours often needed in their occupation or the degree of cultural awareness (e.g. Japanese honorifics) required to succeed in their jobs.

Recommendation for administrative and bureaucracy challenges



Shift policy lens from administrative-based to sector- or skill-based classification



Strengthen the role of Ministry of P2MI as a dedicated regulator



Enhancing collaboration and cross-ministry integration to simplify regional administrative processes

Problem tackled	Unclear Skill-Based Job Classifications and Overlapping Occupation Categories	Conflict of Interest in Government's Dual Role	Bureaucratic Delays and Administrative Hurdles
Coordinator	Ministry of P2MI		
Supporting stakeholders	Directorate General of Immigration, Ministry of Manpower	<ul style="list-style-type: none"> Directorate General of Population and Civil Registration, Ministry of Home Affairs Indonesian embassies at destination countries 	

Recommendation for Capacity challenges



Improve training sessions and strengthen collaboration to enhance training and capacity development.



Pursue mutual recognition agreements (MRA) to standardize certifications

Problem tackled	Competency Gap, Inadequate Language Proficiency, Limited Mental Resilience	Competency Gap
Coordinator	<ul style="list-style-type: none"> Directorate General of Vocational School, Ministry of Primary and Secondary Education (<i>Kemdikdasmen</i>)* Directorate of Director of Learning and Student Affairs, Ministry of Higher Education, Science, and Technology 	Member for Certification, National Professional Certification Agency (BNSP)
Supporting stakeholders	<ul style="list-style-type: none"> Directorate General of Promotion and Utilization of Overseas Job Opportunity, Ministry of P2MI LPK** 	<ul style="list-style-type: none"> Directorate General of Promotion and Utilization of Overseas Job Opportunity, Ministry of P2MI Directorate General of International Law and Agreement, Ministry of Foreign Affairs (<i>Kemlu</i>) Indonesian embassies at destination countries LPK**

*oversees curriculum for SMK students

**private stakeholders

Seven Actionable Recommendations to Enhance PMI Deployment Strategies

Addressing issues related to PMIs requires a strong commitment and coordination among government stakeholders. The Ministry of P2MI, supported by other relevant ministries and agencies, must focus on resolving fundamental challenges, particularly those related to administrative and bureaucratic processes. At the same time, capacity-related issues can be addressed through active collaboration between the Ministry of Basic and Secondary Education, the Ministry of Higher Education, Science, and Technology, and the Ministry of P2MI. This partnership aims to enhance the quality and preparedness of PMIs for overseas deployment.

1. Shift Policy Lens from Administrative-Based to Sector- or Skill-Based Classification

Future regulatory frameworks for PMIs should prioritize standardizing job categories by grouping workers according to skill levels (unskilled, low-skilled, medium-skilled, and high-skilled) and sectors (e.g., agriculture, hospitality, industry, and health). Standardized classifications will enhance clarity regarding roles, required skills, and job responsibilities, while reducing confusion caused by overlapping or undefined categories, allowing the government to more efficiently target their interventions to prepare Indonesians for the most in-demand skilled jobs.

Furthermore, the return of PMI workers should be documented to improve the quality of PMI data and help identify valuable job opportunities based on contract duration, protection, benefits, and potential for career advancement abroad. Additionally, such documentation is crucial for empowering and reintegrating workers—whether as instructors or educators in training roles, or as competitively skilled workers in Indonesia's national industries.

2. Strengthen the Role of the Ministry of P2MI as a Dedicated Regulator

The Ministry of P2MI should concentrate exclusively on its role as a regulator, allowing the private sector to manage the PMI deployment business and ecosystem. This approach enhances oversight, optimizes the potential of the private sector, and increases opportunities for PMI deployment. A clear division of responsibilities will create a more efficient and accountable system for developing a robust PMI industry.

3. Enhancing Collaboration and Cross-Ministry Integration to Simplify Regional Administrative Processes

The resolution of administrative issues largely falls under the jurisdiction of regional governments, including districts, cities, and villages, which are overseen by the Ministry of Home Affairs. To address these challenges effectively, it is essential to integrate data management processes, particularly those involving personal information, with the government job application database. This integration would streamline workflows, reduce reliance on offline administrative processes, and enhance efficiency across all levels of government, potentially minimizing opportunities for informal fees that often arise in face-to-face interactions. In addition, other relevant ministries and agencies should support data integration efforts to ensure a more seamless and coordinated approach to addressing administrative bottlenecks, ultimately improving service delivery for all stakeholders.

4. Establishing New Collaboration Between Government Bodies and Private Stakeholders for Training and Capacity Development

The Ministry of Primary and Secondary Education (Kemendikdasmen) and the Ministry of Higher Education, Science, and Technology (Kemristekdikti), in coordination with the Ministry of P2MI, should actively collaborate with migrant deployment agents (P3MIs) to identify the skills required by employers and develop programs that align with international standards for migrant workers. Additionally, they should implement initiatives to enhance mental resilience and adaptability. These efforts will ensure that workers are well-prepared, confident, and motivated to succeed in overseas employment, allowing for the creation of a standardized curriculum that meets the needs of local industries while also addressing the demands of the global labor market.

Moreover, the role of the private sector within the PMI ecosystem is not yet fully integrated with the education sector. Only a limited number of companies operate their own training programs or collaborate with educational institutions to produce graduates who meet the needs of the overseas workforce industry. This gap poses challenges in preparing high school graduates to meet the medium-skill PMI standards required in destination countries, and further adds to the training duration and cost borne by potential migrants before deployment.

To address this issue, the private sector—particularly those involved in training and preparing prospective migrant workers—must take a more active role. Their involvement should extend beyond simply promoting and introducing overseas job opportunities, as has been practiced by P3MIs thus far.

5. Strengthen mental resilience of PMIs in pre-departure programs.

Mental resilience is essential for PMIs' success abroad. Pre-departure programs should include mental readiness training, financial management workshops, and cultural immersion. Additionally, these programs should emphasize character development, fostering adaptability, self-discipline, and cultural sensitivity to help PMIs navigate diverse environments effectively. By building these qualities, PMIs can reduce homesickness, overcome challenges, and unlock their full potential. In this regard, utilizing former PMIs for pre-deployment training or orientation has proven helpful.

6. Pursue mutual recognition agreements (MRA) to standardize certifications

Pursuing mutual recognition agreements (MRAs) with targeted countries can ensure compatibility between Indonesia's domestic certifications and international standards applicable overseas. This would reduce training redundancy and facilitate a faster deployment process, as PMIs would be job-ready upon deployment.

Training institutions (LPKs) should also be engaged to provide essential support, such as language training, job-specific orientation, and the skills required for these roles. Additionally, these institutions can offer career path guidance and preparatory materials for high school students.

7. Adopt a Proactive Approach in LPK Funding for Private Players

The need to quickly scale and standardize language and skills training will require the involvement of private players. However, the high costs and specialized knowledge needed present obstacles preventing new players from immediately filling this gap. Agents also face the additional cost burden of providing initial funding for trainee migrants; however, the government's small loans program can only be used for deployment, not training.

A consortium of private players could alleviate the funding burden on individual actors in the sector while potentially generating economies of scale. Furthermore, a consortium would facilitate curriculum alignment and knowledge sharing among training centers. Repurposing existing tax incentives for vocational education to explicitly include Licensed Training Providers (LPKs) could also attract new entrants. Finally, the government could leverage the Himbara (Himpunan Bank Milik Negara) network to offer People's Business Credits (KUR) for prospective migrant worker (PMI) training, thereby shifting the financial burden from both LPKs and trainees.

Unlocking Market Potential Through Three Focused Policy Initiatives

Maximizing market opportunities through targeted policy initiatives is crucial for enhancing the deployment of Indonesia's PMIs. By strategically identifying these markets and aligning training programs with international standards, Indonesia can equip PMIs to move into higher-skilled positions that fulfill global demand while providing better-earning potential. Additionally, focusing on sectors where Indonesia demonstrates a competitive edge and addressing language proficiency challenges will facilitate smoother entry into foreign job markets. The following recommendations outline three focused policy initiatives to enhance the effectiveness of PMI deployment.

1. Strategize PMI deployment targeting at low- and medium-skill levels.

The fact that PMI with middle school and high school/vocational education backgrounds are employed in the unskilled job category requires a comprehensive and proper strategy through targeted upskilling. Enhanced technical and language training programs, along with better job placements aligned with international standards, are efforts to transition these workers into low- and medium-skilled roles, enabling them to secure higher-skilled jobs and earn higher salaries.

2. Prioritize sectors and occupations where Indonesia has the greatest competitive advantage.

While workforce shortages are common,

four notable sectors—Care, Industry, Hospitality, and Agriculture—can provide PMIs with sufficient job opportunities at the skill levels where Indonesia currently shows potential strength.

Supported by detailed analysis, IBC has identified four specific occupations where Indonesia can competitively scale PMI deployments which are briefly shared:



Caregivers, where Indonesia's significant surplus of nurses can be redirected toward this role. Countries like Japan and Germany, which forecast persistent shortages, do not primarily use English, providing a level playing field against competitors like India and the Philippines.



Welders, where there is a shortage of welders in nearly every developed country, and global migration is insufficient to meet this demand.



Hotel Staff, where Gulf employers have praised Indonesian workers for their positive attitudes and friendliness compared to competitors from India, Pakistan, and Bangladesh.



Horticulture Workers, where the demand is high in Japan, South Korea, and Australia, all offering horticulture-specific visas to address domestic shortages.

3. Strengthening PMI Competitiveness in Non-English Speaking Countries

Most shortages of low- to medium-skilled workers occur in regions where English is predominantly spoken. However, the average English proficiency of Indonesians is lower than that of many other migrant-sending countries (e.g., the Philippines and India). Countries such as Japan, Germany, and South Korea require proficiency in their native languages rather than in English, which enhances the competitiveness of PMIs. Increasing market penetration in these countries can be advantageous. Nevertheless, it is essential to ensure that pre-deployment training includes local dialects and practical situations, such as Japanese honorifics and work-specific contexts.

Understanding How Vietnam's Policies Contribute to Easing the Private Sector's Burden in Deploying Migrant Workers

Many industry players have extensive and long-standing business networks, both nationally and internationally, that can be leveraged for PMI deployment. However, the government retains control over bureaucratic processes and has the scale necessary to promote migration effectively.

A good example from Vietnam is the government's initiative to promote migration in poorer districts by providing loans and financial assistance for training, medical check-ups, and bureaucratic costs. They also collaborate with the governments of destination countries to hold seminars in these areas to promote working abroad. Additionally, they work together to prevent duplicate insurance payments, limit document processing fees, and improve data collection on migrants while they are abroad.

This policy brief is part of the ongoing study titled "Strategic Expansion of Indonesia's Overseas Workers Industry to Support National Economic Goals." A comprehensive discussion of the topics addressed in this brief will be provided upon the completion of the study, offering valuable insights and recommendations to enhance the effectiveness of Indonesia's overseas workers industry in supporting national economic objectives.



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