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INTRODUCTION

The tourism sector is multidisciplinary in nature and its growth and success is highly dependent on other sectors. This multi-sectoral nature of tourism subjects it to various policy and regulatory frameworks some of which impacts negatively on the development and growth of tourism. The Tourism Policy Bulletin focuses on various policy developments at global, national and local level.

The aim of the Bulletin is to provide an overview of recent policy developments across sectors, with a view to inform tourism stakeholders and encourage proactive responses. Policy developments covered by this issue range from tourism, visa policies, airlift, bills and MoU.
NATIONAL POLICY DEVELOPMENTS

1. Coronavirus

The tourism sector has been the subject of numerous socio-economic and environmental shocks. These shocks range from economic crisis, earth quakes, tsunami, terrorist attacks, volcanic eruption and communicable diseases such as Severe Acute Respiratory Syndrome (SARS). These shocks shock disrupt travel and led to a general decline in visitor numbers in the short term. Despite these disruptions the sector demonstrated incredible resilience with traveler numbers recovering after the incidents.

Currently, the global tourism sector is facing a formidable disruptor in the form of Coronavirus (COVID-19). The virus was first reported in Hubei Province, Wuhan City in mainland China in late 2019. It has now spread to all regions of the globe infecting thousands of people and killing over 7000, with the majority of those from China. The World Health Organisation has declared COVID-19 a pandemic prompting various countries to take drastic measures to curb the spread.

South Africa reported its first case of Coronavirus on the 1st week of March 2020. The number of infections were reported to have reached 62 on the 17th of March 2019. The impact on the South African travel and tourism market is expected to be huge. Already, the Minister of Tourism has announced cancellation of Africa Tourism Indaba and Cathay Pacific, the biggest carrier of passengers between RSA and China via Hong Kong, announced adhoc cancellation between Johannesburg and Hong Kong, which will be affected in April/May.

The President of the Republic of South Africa declared a national state of disaster and imposed travel bans on foreign nationals from high risk countries as from the 18 March 2020. These include Italy; Iran; South Korea; Spain; Germany; United States of America; United Kingdom and China. Visas from these countries have been have been cancelled.

Meanwhile South Africans were also advised to refrain from travelling to the affected countries. Whilst travellers from medium risk countries such as Portugal, Hong Kong and Singapore will be required to undergo high intensity screening. The President also announced that screening and testing measures will be intensified at OR Tambo, Cape Town ad King Shaka International Airport. In addition, 35 out of 53 land ports will

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1 Statement by the President on measures to combat COVID-19 epidemic.
be shut down on the 16th of March 2020 whilst 2 of the 8 sea ports will be closed for passengers and crew changes.

The virus has sent shockwaves across the global economy and appears to be crippling all forms of transportation. The aviation industry has been the hardest hit with thousands of international flights cancelled. The cancellations were attributed to the loss of demand as people were cancelling their trips due to the fear of infection. Thousands of flights to and from China were cancelled and the cancelation has now been extended to other severely affected countries outside of China.

In light of the cancellation, the International Air Transport Association (IATA) has projected huge revenue losses and the projections are changing daily as the infection rates and disruptions increase. The latest statement by IATA projected revenue loss of about -$63 billion if it is contained in the current markets and $113 billion in a scenario where the virus spreads further. This is a huge loss given the tight margins of the airline industry.

Ocean liners have lately become the vehicle for Coronavirus incubation leading to some countries banning cruise ship from docking in their harbours. The industry has also reported many cancellations by travellers leading to cruise liners cancelling some of the cruises. Relatedly, the stock of cruise liners plummeted in the New York Stock Exchange on the 5th of March 2020. Numerous cruise liners were turned away in various ports due to the fear of the virus. This affected the cruise liners that did not have any reported case of the virus.

Hotel chains have also reported on the negative impact of the virus on their business. The cancellation of the Mobile Congress in Barcelona led to bookings in Barcelona Hotels dropping by an estimated 25% according to data from Forward Star. Furthermore, numerous hotels reported closure off some of their hotels due to virus. Hayatt Hotels reported closure of 26 hotels in mainland China; Hilton reported closure of 150 hotels in China and Wyndham Hotels & resorts closed 1000 hotels in China. This is expected to cost the hotels millions of dollars. Accor Managed Windsor Suites Bangkok announced that they are closing down the hotel due to Coronavirus and subsequent lack of business and employees are to be redundant with 30th of April 2020 as the last day of operation.
2. Regulations in Respect of the National Tourism Information and Monitoring System

The Department of Tourism published notice no 102 of 2020 in the government gazette, on the Regulations in respect of the National Tourism Information and Monitoring System. The regulations are done in terms of section 61(1)(a) of the Tourism Act of 2014. The Tourism Act No 3 of 2014, Chapter 2 on the National Tourism Information & Monitoring System, gives the Minister powers to establish a national tourism information and monitoring systems for the purpose of: collecting, recording, managing, analysing and disseminating information and data on tourism; and monitoring developments and trends in tourism. These regulations will apply uniformly in all provinces of the Republic of South Africa.

The National Tourism Information and Monitoring System is a set of processes and procedures enabled by a web application designed to capture, store, disseminate and analyse tourism information. The Tourism Act underlines the need for the Minister to determine the categories of tourism businesses that may provide information. This includes determining the period within which information is to be provided and the form and manner for providing information. In this instance, data and information to be captured on the system includes all tourism related information such as the Tourism Satellite Account (TSA) classifications and categories as well as data and information on the following:

- accommodation;
- meetings, exhibitions, conferences and special events;
- attractions and activities;
- tour operators and tourist guide services;
- restaurants and similar services;
- tourism information services;
- hiring and leasing;
- passenger transport and related services;
- travel agencies and other reservation services;
- cultural services;
- sports and recreational services; and
- tourism-related infrastructure

3. Draft Public Procurement Bill

Government continues to explore ways of improving public procurement with a view to contribute to the development of society, particularly the previously disadvantaged. Accordingly, the National Treasury published a draft Public Procurement Bill for public comments. The Bill seeks to regulate public procurement; prescribe a framework for procurement policy envisaged in section 217(3) of the Constitution; and provide for matters connected therewith. The primary objects of this Bill are, with due regard to section 217 of the Constitution, to:

- ensure that the State utilises and leverages procurement to—
  (i) advance economic opportunities for previously disadvantaged people and women, the youth and people with disabilities small businesses; and
  (ii) promote local production.
- provide for procurement that—
  (i) is developmental in nature;
  (ii) ensures value for money in the use of public funds;
  (iii) aspires to expand the productive base of the economy;
  (iv) supports innovation and investment and achieve economy, efficiency and maximum competition;
  (v) uses technology to simplify procurement processes and better leverage economies of scale;
- develop economic capacity in the Republic, through the provision of opportunities for local suppliers to participate in procurement; and
- incorporate in the procurement system—
  (i) categories of preference in the allocation of contracts; and
  (ii) the protection and advancement of persons and categories of persons disadvantaged by unfair discrimination
- create single regulatory framework for public procurement to eliminate fragmented procurement prescripts.

The draft bill proposes a single regulatory framework for procurement applicable to national, provincial and local government, as well as state owned entities. The National Treasury has, over the past few years, embarked on a process to reform and modernise public procurement. Among these was the strategic sourcing principles to introduce a differentiated procurement approach for different types of commodities and to move away from the one-size-fits all
approach. Strategic procurement introduces alternative sourcing strategies for complex procurement of capital projects, infrastructure, and construction and cost containment measures. To improve efficiencies, the department also introduced the Central Supplier Database, where all suppliers that do business or intend doing business with the State, are registered without having to register on each and every government database as was the case previously.

Public comments into the bill that proposes the repeal of the Preferential Procurement Policy Framework Act of 2000 are open until 31 May 2020. The draft Bill and details about the submission of comment are available on the National Treasury website (www.treasury.gov.za).

4. Economic Regulation of Transport Bill

The Minister of Transport introduced the Economic Regulation of Transport Bill to the National Assembly on the 31st January 2020. The Department of Transport published the Bill’s explanatory summary in Government Gazette 42887 in December 2019. The Bill seeks to consolidate the economic regulation of transport within a single framework and policy; establish the Transport Economic Regulator; establish the Transport Economic Council and to make consequential amendments to various other Acts.

The purpose of the Economic Regulation of transport Bill is to:

- promote the development of a competitive, efficient and viable South African transport industry contributing to economic growth and development;
- promote the development of an integrated system of economic regulation of transport of passengers and goods, by air or through airports or ports, and by road or rail;
- promote efficiency, reliability, safety and performance in the management and operation of transport facilities and services, in accordance with recognized international standards and local requirements;
- establish appropriate institutional arrangements and procedures to support the consistent economic regulation of transport facilities and services;
- enhance transparency in the management of transport facilities and services;
- promote appropriate investment in transport facilities and services; and


• develop complaints and dispute resolution mechanisms.

Improved transportation sector outcomes contribute to improved growth outcomes of the economy as a whole. Transport has been identified by the National Tourism Sector Strategy as an enabler for tourism growth. The tourism sector is therefore heavily depended on an effective transport sector. The intended proposal’s economic outcomes will thus have a positive impact to the tourism sector. The Bill is currently under consideration by the National Assembly.

5. Minimum Wage Increase

The Department of Employment and Labour announced the new rate for the National Minimum Wage (NMW) for each ordinary hour worked. The new amendment to the NMW is in line with the Basic Conditions of Employment Act, that allows for an annual review. In terms of the notice published by the Minister of Labour, the new rate will be R 20.76, an increase of 3.8% and applicable as of the 01st March 2020. The NMW came into effect on the 01st of January 2019 at the level of R20.00 per hour. The minimum wage regulation applies to all workers- i.e. any person who works for another person and who receives or is entitled to receive any payment for that work.

The new minimum wage sets a new baseline across all sectors, with a few exceptions. The exceptions include domestic workers, farm workers, workers employed in Expanded Public Works Programmes and workers with learnership agreements in terms of the Skills Development Act. The minimum wages will be as follows:

- Domestic workers: R 15,57 per hour
- Farm/ Forestry workers: R 18,68 per hour
- Workers employed on Expanded Public Works: R 11,42 per hour

The national minimum wage is the floor level below which no employee should be paid and does not include any other allowances. For workers who still earn below the NMW level, legislation provided for a transition until all employers are subjected to the NMW. The NMW system is accessible online at http://nmw.labour.gov.za

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LOCAL POLICY DEVELOPMENTS

1. Draft Nature Reserves By-Law

The City of Cape Town published a Draft Nature Reserves By-law. The purpose of the Draft Nature Reserves By-law is to protect and preserve the nature reserves in Cape Town’s Municipality boundaries, as well as to ensure the safety and pleasure of those visiting these areas. The By-law is also intended to regulate the management of the City’s nature reserves, access and uses and lists a number of prohibited activities.\(^7\)

The proposed Nature Reserves By-law is based on the national regulations and aims to ensure that the city fulfils its obligations in terms of the National Environmental Management Protected Areas Act (NEMPAA). Currently, the City of Cape Town’s 23 nature reserves are managed in terms of the National Nature Reserve Regulations. The proposed By-law will allow the city to improve efficiency, including the enforcement of these regulations more vigorously through the municipal court system and the issuing of compliance notices.

The proposed By-law seeks to ensure that the protected areas are utilised by learners, tourists, volunteers, and residents in a sustainable manner. The By-law further prescribe access to nature reserves, entrance and access points and the conditions under which an area may be closed to the public. The Draft By-law also identifies prohibited activities which includes the feeding and hunting of animals; dumping and littering; playing of loud music; and lists activities that require prior authorization such as filming, tours, events, research, the flying of drones and rock climbing. Lastly, the draft by-law empowers peace officers to issue a fine, or instruct those who are contravening the by-law to leave the reserve.

2. Tourism Safety a Top Priority for Mpumalanga Tourism

Tourism stakeholders in Mpumalanga have introduced a victim support programme as part of the Joint Provincial Tourism Safety Forum to ensure tourism safety remains high on the agenda. The forum was established by Deputy Minister of Tourism, Honourable Fish

\(^7\) http://www.capetown.gov.za/Media-and-news/Residents%20encouraged%20to%20comment%20on%20bylaw%20intended%20to%20protect%20nature%20reserves,%20visitors
Mahlalela, in December 2019 and is jointly driven by the Mpumalanga Tourism and Parks Agency (MTPA), the Kruger Lowveld Chamber of Business and Tourism (KLCBT) and the South African Police Service (SAPS), Mpumalanga.

Kruger Lowveld Tourism (KLT) – a division of KLCBT – largely drove the initiative to provide victim support to tourists in distress. KLCBT victim support coordinators work closely with the Tourism Safety Manager at MTPA. The programme also took an estimated 30 victim support volunteers, who were provided with a comprehensive file of contact details of fellow volunteers, police officials in every town, emergency services, trauma councilors and translators.

As part of the programme, victims are assisted with communicating with their relatives back home, as well as replacing clothing, toiletries and chronic medication, amongst others. Informative posters were provided at provincial police stations outlining the respective protocols to follow should a tourist report a crime. This information includes details of who to call for victim assistance as well as reporting procedures. Other safety and security measures have been put in place, such as CCTV cameras in strategic points in areas like Hazyview as well as increased patrols of police and private security companies. More information on the tourism safety programme can be accessed on info@mpumalanga-info.co.za

3. EThekwini Municipality implements the upgrade of Point Watermain.

The Mayor of eThekwini Municipality presided over the sod-turning ceremony of the multimillion upgrade of the Point Watermain setting in motion major catalytic infrastructure development projects. The project is reported to be worth over 250 million and over 100 job opportunities to be created.

The Mayor viewed the infrastructure upgrade as a clear demonstration of the city’s objective of attracting more investment. The development is expected to take about 18 months and will ensure adequate water supply provision for the development in the Point Precinct such as two multibillion-rand sky scrapers due to be constructed near the new promenade. This will include upgrade of sidewalks and public realms which will connect the Point Precinct to City Centre.

The Mayor underlined the importance of integrating investment in the inner city and need to ensure that the decay in the inner city is dealt with. Accordingly, the Mayor indicated that the public realm will also interface with the road edge connecting the cruise terminal which is currently under construction.

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4. Airbnb Adds 31 New Languages Including Xhosa, Zulu and Swahili

The Airbnb platform introduced IsiXhosa, IsiZulu and Swahili, alongside 28 languages. The platform is accessible to more than four billion native speakers and currently supporting 62 languages. With these new languages, Airbnb is working to bring economic opportunities to even more hosts, and making it easier for guests to experience travel that is local, authentic and unique.

Airbnb’s country manager for South Africa Velma Corcoran, indicated that by adding more languages it will help regular people to create new economic opportunities for themselves in the home and communities they live in, especially those who live in under-resourced areas. In South Africa, there are more than 20 000 listings on the platform and home-sharing continues to bring a wealth of benefits to the local economy, Tourism industry and communities.

Below table shows the 31 new languages now available on Airbnb¹⁰:

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1. Tourism’s Role in Rural Development Across Africa Highlighted at UNWTO Forum Event at FITUR 2020

Casa Africa, the International Tourism Fair of Madrid (FITUR) as UNWTO’s official partners and in collaboration with Côte D’Ivoire, met to discuss the continent’s potential on creative industries as well as the potential benefits of diversifying the tourism sector, in particular as a means of driving rural development. According to the UNWTO, the discussions explored the untapped potential of gastronomy tourism and the growing African fashion industry, particularly with regards to attracting international tourists. Additionally, there was also a session dedicated to the presentation of 10 projects aiming at the development of tourism in various countries in Africa, such as South Africa, Zambia, Comoros, the Democratic Republic of Congo and Côte d’Ivoire.

During FITUR, the latest data on international tourist numbers and trends was released by the UNWTO. International arrivals to African destinations reached 71 million in 2019 and grew by 4% when compared with 2018. The increase in International arrivals to Africa is expected to continue, hence the UNWTO stated its commitment to supporting African destinations grow their tourism sectors responsibly and sustainably.

2. Nigeria’s New Visa Policy

The Nigerian government has rolled out the new Nigeria Visa Policy (NVP) to attract foreign investors as well as to boost trade in Africa. The policy was launched on Tuesday, 4th of February 2020. The NVP 2020 is a global visa system with biometrics linked to each application online.

The biometrics are conducted at the port of entry to reduce the chances of criminals beating the system. Since the system is automated; it eliminates corruption. The NVP

provide for a visa on arrival for citizens of African Union member countries.

This visa on arrival can only be issued at airports, not at land borders. It is specifically for short visits. The policy, according to the President, aims to attract innovation as well as specialized skills and knowledge to complement what is locally available, and propel Nigeria to attain a globally competitive economy, improved business environment and by so doing, boosts the country’s tourism potential13.

3. AFRAA, Routes Sign MoU to Drive African Aviation Growth

The African Airlines Association (AFRAA) and Routes signed a MoU to stimulate new air services and champion the African aviation industry14. The MoU will allow AFRAA and Routes to work jointly on sharing of data and analytics, promotion of key issues that are affecting airlines and airports within Africa, access to media opportunities among other mutually beneficial actions. According to Abdérahmane Berthé, AFRAA secretary-general, the MoU is beneficial to support the development of aviation in Africa which is growing at above global average rates but accounts for less than 3% of global traffic. Strong partnerships among industry stakeholders are instrumental to the realisation of African aviation’s potential which will result to economic and social benefits for the continent15. Additionally, the AFRAA secretary-general stated that “one of their strategic objectives is to become a hub for data intelligence and expertise on the African Aviation Industry”. African airlines have to keep up with the developments through proper information management and data intelligence.

4. Update on the Implementation of the Tripartite Free Trade Area Agreement

Eight countries have so far ratified the Tripartite Free Trade Area Agreement with six remaining to attain the required threshold of 14 for the Agreement to enter into force. Namibia is the latest to ratify the TFTA.

14 https://www.bizcommunity.africa/Article/410/583/199878.html
15 https://www.bizcommunity.africa/Article/410/583/199878.html
agreement and joins Egypt, Uganda, Kenya, South Africa, Rwanda, Burundi and Botswana in the list of countries that have ratified the Tripartite Free Trade Area Agreement. According to the COMESA, seven countries are in advanced stages of the ratification process: these are Comoros, Eswatini, Malawi, Sudan, Tanzania, Zambia and Zimbabwe. These countries are expected to complete the ratification process before the end of this year paving the way for its implementation.

The tripartite FTA brings together 28 countries that are members of COMESA, the East African Community (EAC) and the Southern African Development Community (SADC). Launched in Sharm-El-Sheikh, Egypt, in June 2015, the TFTA champions integration that is grounded on the developmental approach to regional integration, based on the three pillars: market integration, industrial development and infrastructure development.

South Africa and Ethiopia have signed an agreement on the waiver of visa requirements for holders of diplomatic or official/service passports. The agreement is expected to ease the travel of officials, which will contribute to further strengthening bilateral relations.

The two countries also signed a memorandum of understanding on cooperation in the field of tourism. It is anticipated that the MoU will be key to the creation of employment opportunities, especially for the youth. A memorandum of understanding on cooperation in the field of health was also signed by the two countries, which is important in providing high quality health services for the citizens of their respective countries especially the young and the elderly.

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GLOBAL POLICY DEVELOPMENTS

1. ICAO adopts the COVID-19 Declaration

In an effort to curb the spread of Coronavirus, the International Civil Aviation Organisation adopted the COVID-19 declaration. The declaration affirms the urgent need to reduce the risks of the spread of COVID-19 by air transport and to protect the health of air travellers and aviation personnel. The resolution was adopted on the 9th of March 2020 during the fourth meeting of its 219th session.

The declaration stresses the need of ensuring that response actions and measures are based on science and facts. It also underlines cross-sector collaboration and the principle of multilateralism, strong international cooperation and coordination amongst all entities involved in the joint action against public health emergency of international concern. The declaration also expresses strong support for the World Health Organisation for states to perform their own risk assessments and adapt their responses accordingly, considering the International Health Regulations of 200518.

ICAO also expressed concern at the economic impact of COVID-19 outbreak on air transport and civil aviation and appreciated aviation industry’s cooperation with governments and international organisations to help implement the following response measures19:

- Apply existing regulations and guidance particularly the Standards and Recommended Practices (SARPS) of Annex 9 and other relevant standards contained in the Convention on International Civil Aviation when addressing communicable diseases.
- Apply existing recommendations and guidance provided by World Health Organisation in accordance with each country’s risk assessment and unique circumstances
- Foster and implement culture of collaboration and information sharing among public health and civil aviation

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18 ICAO COVID-19 Declaration

19 As cited in ICAO COVID-19 Declaration
ICAO’s leadership underlined strong commitment to support its member states in implementing response measures and expressed appreciation for WHO’s cooperation with ICAO towards responding to COVID-19.

2. Changes in Visa Policy in Turkey

The Republic of Turkey announced its intentions to eliminate entry visas for the nationals of five Schengen Countries and the UK citizens for touristic travels to the country for every 90 days within 180-day periods. This change is effective as of 2 March 2020. The main reason for the policy change is to further develop tourism potential, in addition to enhancing commercial, economic and cultural relations with these countries. According to the country’s new tourism strategy, the Turkish government aims to lure more than 75 million tourists and make over $65 billion in revenue by 2023, with countries in Europe as one of the main target markets for Turkish tourism.

3. Global Tourism Plastics Initiative Takes On One of the Worst Polluters

The UNWTO expresses its support for the groundbreaking and ambitious Global Tourism Plastic Initiative. The Global Tourism Plastics Initiative aims to reduce the amount of plastic
pollution caused by the tourism sector. To accomplish this vision, tourism companies and destinations will be required to make a set of concrete and actionable commitments by 2025, including to:

- Eliminate problematic or unnecessary plastic packaging and items by 2025;
- Take action to move from single-use to reuse models or reusable alternatives by 2025;
- Engage the value chain to move towards 100% of plastic packaging to be reusable, recyclable, or compostable;
- Take action to increase the amount of recycled content across all plastic packaging and items used;
- Commit to collaborate and invest to increase the recycling and composting rates for plastics; and
- Report publicly and annually on progress made towards these targets.

The Initiative is a key activity of the Sustainable Tourism Programme of the One Planet Network and it acts as the interface for the tourism sector of the New Plastics Economy Global Commitment of the Ellen MacArthur Foundation. The UNWTO Secretary-General Zurab Pololikashvili is of the view that the Global Tourism Plastics Initiative is a unique opportunity for tourism companies and destinations to step forward and lead the global effort addressing plastic pollution.

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4. Germany's New Labor Immigration law

Germany introduced a new Skilled Immigration Act that will make it easier for non-EU workers to live and work in the country. The new law primarily applies to qualified professionals, including people who have completed a university degree or have some form of vocational training. After working for two years in Germany, migrants can then apply for a permanent residence status.

The new law has removed the key regulation, that people from outside the EU can only take a job if there is no German or EU citizen who is able to do it instead. Germany is now open to anyone who has completed vocational training, regardless of whether that profession is in demand.

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