

Summary

Bureau of Emigration and Overseas Employment was established in 1971 by merging the three government institutions namely Protectorate of Emigrants, Directorate of Seamen Welfare and National Manpower Council. It is comprised of Directorates of Administration, Finance, Operations, Research & Coordination, and Information Technology. It controls, regulates, facilitates and monitors the emigration process through seven of its regional offices, namely Protectorates of Emigrants located at Karachi, Lahore, Rawalpindi, Multan, Malakand, Peshawar and Quetta.

Since its inception, it has registered and facilitated more than 9.6 million Pakistanis proceeding abroad for employment throughout the world especially to GCC countries. More than 96 % of the Pakistani manpower is working in GCC countries where Saudi Arabia (50.90%) and UAE (33.10%) are the largest destination countries followed by Oman (7.26%), Kuwait (1.90%), Bahrain (1.58%), and Qatar (1.41%). During 2016, the pattern of migration was similar to the previous trend. Overseas Employment Promoters (OEP's) and Overseas Employment Corporation (OEC) have been playing a vital role for export of Pakistani manpower.

The overseas Pakistanis are playing a pivotal role to support the economy in the form of remittances. Remittances constitute one of the largest and more resilient sources of foreign exchange earnings. The flow of foreign remittances to Pakistan has grown steadily over the past years rising from 8905 million dollars in 2009-10 to 19,954 million dollars in 2015-16. During (July-January) of FY 2016-17, overseas Pakistanis sent 10.95 billion US dollars remittances. To facilitate the smooth and efficient flow of remittances, Pakistan Remittance Initiative (PRI) was launched by Ministry of Overseas Pakistanis & Human Resource Development, Ministry of Finance and State Bank of Pakistan.

BE&OE is in liaison with the National Vocational & Technical Training Commission (NAVTTTC), Technical Education & Vocational Training Authority (TEVTA), Skill Development Council (SDC) and various other institutes for skill development and certification of manpower according to international standard.

The various initiatives were undertaken by Bureau/ Ministry of OP&HRD to facilitate the intending emigrants. Overseas Pakistani Foundation (OPF) is striving for the welfare of overseas Pakistanis and their families living in Pakistan. It is mandatory for every intending emigrant to get insurance coverage before proceeding abroad. In this regard, an insurance scheme was introduced in February 1982. The Scheme is being implemented by Bureau of Emigration and Overseas Employment under Rule 22-A of Emigration Rules 1979 through State Life Insurance Corporation. Under this scheme, every emigrant gets the compulsory insurance coverage of Rs. One million against one time premium of Rs.2000/- for the period of two years. During the year 2016, about 797.78 and 58.14 million rupees were paid against death and disability claims respectively. Moreover, one window facilitation desks were established at international airports of the country to facilitate the migrants and 277 new licenses were issued to OEPs in the year 2016.

SECTION II

Introduction

Background

Migration is a centuries old phenomenon. People used to relocate for better livelihood, opportunities since times immemorial. The migration can be permanent or temporary but the core purpose is the socio-economic uplift, life & job security of emigrants and their families. The overseas workers are considered as the backbone of the countries of their origin, as well as they contribute to the economic development of the host countries.

Pakistan has remained an attractive human resource export country for foreign manpower import countries. Prior to the 70s the outflow of Pakistani emigrants was towards Western countries especially to United Kingdom. In the early 70's, the surge of developmental activities and booming economies in the developing countries in general, and discovery of black gold Gulf countries in particular, the trend was redirected towards Middle East. Pakistan having surplus labour economy as well as religious contiguity made effective and constructive policies to capture the labour market of the Middle East countries.

The Bureau of Emigration and Overseas Employment (BE&OE) was established on October 1st, 1971. It was formulated by merging the three government institutions namely Protectorate of Emigrants, Directorate of Seamen's Welfare and National Manpower Council. Initially, it functioned under the Emigration Act of 1922 and Rules 1959 which later on was substituted by the Emigration Ordinance and Rules 1979. Bureau of Emigration and Overseas Employment systematically streamlined the emigration process and played a vital role to export the Pakistani manpower through Overseas Employment Promoters to all over the world especially to Gulf Cooperation Council Countries (GCC).

Report Objectives

The major objective of this report is to analyze the overall performance of Bureau's and its seven regional offices called Protectorates of Emigrants. The report covers the following specific objectives, keep in view its broader jurisdiction:

- I. To compare and analyze the emigration pattern/trends of manpower export to other countries during 2016 (January to December) with that of the trends of 2015.
- II. To highlight the steps taken by BE&OE to improve and facilitate the emigration process
- III. To suggest measures to capture the future market avenues/export of manpower for overseas employment.

Functions of Bureau of Emigration and Overseas Employment

The functions of Bureau of Emigration and Overseas Employment are multifarious in number and nature. They are as follows:-

- Promotion of Pakistani manpower to other countries.
- It controls and regulates the emigration process under the Emigration Ordinance, 1979.
- It looks after the welfare and facilitation of the emigrants.
- Pre and Post departure orientation of emigrants.
- It is monitoring, supervising and processing the OEP's licenses.
- It is mandatory for Pakistani workers to get insurance coverage before going abroad and Bureau is managing the State Life Emigrants Insurance Fund (SLEIF). It is authorized to sign the memorandum of understanding with foreign countries for export of manpower and it advises the Federal Government on emigration procedures and policies.

Organization

The Bureau of Emigration and Overseas Employment comprises Directorates of Administration/Establishment, Operation, Research, Coordination, Finance and Information Technology.

Protectorate of Emigrants (PE)

There are seven regional offices named "Protectorates of Emigrants" operating in Karachi, Lahore, Rawalpindi, Peshawar, Multan, Quetta and Malakand. These protectorates are performing various functions under the Rule-4 of Emigration Rules, 1979. Some major functions are as follows. Mainly, P.E offices process all the demands in private sector of OEP's according to the procedure laid down by the DG. They provide Pre departure and Post Arrival orientation to the proceeding emigrants. These offices monitor and supervise the performance of OEPs.

Community Welfare Attaches (CWA) Offices

There are 21 CWAs operating in 15 different countries of the world especially in Gulf countries. The purpose of CWAs is safeguarding the interests and welfare of emigrants and promoting overseas employment. These CWAs are appointed under Section 7 of Emigration ordinance, 1979. Under Rule-30 of Emigration Rules, 1979, the CWAs perform their work in the countries of destination.

S.No.	Countries/Station	Name of CWA
1	Saudi Arabia (Jeddah-I)	Mr. Basit Maqsood Abbasi
2	Saudi Arabia (Jeddah-II)	Mr. Najeeb Ullah Khan
3	Saudi Arabia (Riyadh-I)	Mr. Abdul Shakoor Shaikh
4	Saudi Arabia (Riyadh-II)	Mr. Mahmood Latif
5	UAE (Abu Dhabi)	Ms. Fareeha Khan
6	UAE (Dubai-I)	Ms. Saulat Saqib
7	UAE(Dubai-II)	Ms. Asma Ali Awan
8	Bahrain (Manama)	Mr. Maqsood Qadir Shah
9	Kuwait (Kuwait City)	Mr. Muhammad Umar Jawaid
10	Qatar (Doha)	Mr. Hafiz Junaid Amir Sial
11	Oman (Muscat)	Ms. Syedah Ramallah Ali
12	Malaysia (Kuala Lumpur)	Mr. Altamash Janjua
13	UK (Manchester)	Ms. Fizzah Niazi
14	Norway (Oslo)	Mr. Muhammad Saleem
15	South Korea (Seoul)	Mr. Muhammad Shafiq Haider
16	Italy (Milan)	Mr. Rizwan Salabat
17	Spain (Barcelona)	Mr. Umer Abbas Mela
18	Greece (Athens)	Mr. Syed Haider Iqbal Naqvi
19	Iraq (Baghdad)	Mr. Waqr Ahamad Langah
20	USA (New York)	Mr. Muhammad Hanif Channa

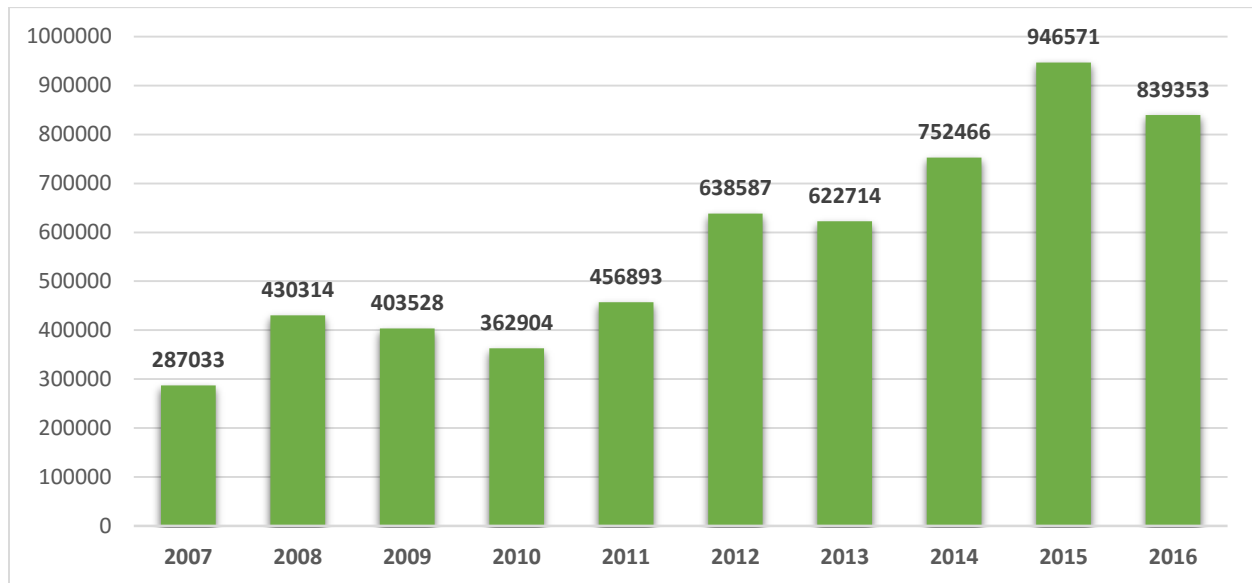
SECTION III

TRENDS OF EXPORT OF MANPOWER

This section presents the performance of Bureau (H.Q)’s and its regional offices namely “Protectorates of Emigrants during the year 2016 (January to December) for the export of Pakistani manpower to other countries. It highlights the patterns/trends of migration with comparative analysis of 2015-16 as well as that of the month, country, regional, district categorical and protector-wise analysis. Further, it discusses the skill composition of emigrants with top countries of destination along with the remittances sent by overseas Pakistanis. Moreover, it highlights the manpower analysis along with reasons of workforce decline particularly in GCC Countries.

Pakistan’s Manpower Export to Other Countries (2007-16)

Graph 1:



Graph 1 highlights the migration trend of previous twelve years. The year 2015 is at the top when 946,571 Pakistanis proceeded abroad. This figure has been the highest so far in the history of BE&OE. But in 2016, export of manpower declined as compared with 2015. Total decline in terms of number is 107,218 in 2016 as compared to that of 2015 when 946,571 emigrants left the country for foreign destinations. But the total number of emigrants in 2016 is still the second

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highest as shown by the graph, thus showing a relative and not an absolute decline. Moreover, the data of previous five years indicates the constantly increasing trend in overseas migration

Region Wise data of Pakistani Emigrants (1971-2016)

As a populous country whose population and work force is global in outlook, Pakistan has been providing labour force to different parts of the world and the total number of Pakistani overseas workers and their families all over the world is estimated to be 9.6 million registered through formal channels. However, in recent years the countries of the Gulf have been their principal destination.

With their high-income economies, the countries of the Gulf Cooperation Council (GCC) attract work force from all over the world. As GCC countries continue to grow rapidly, potential migrants worldwide are becoming more aware of countries such as Saudi Arabia and the United Arab Emirates (UAE) as possible destinations to seek economic opportunities and employment.

Table 1:

S.#	Countries	1971-2016	PERCENTAGE
1	GCC	9240053	96.14%
2	Other Middle Eastern Countries	101169	1.05%
3	Africa	97268	1.01%
4	Malaysia.	80260	0.84%
5	EU	31985	0.33%
6	Korea	15450	0.16%
7	Others	44735	0.47%
	Total:	9610920	100.00%

However, Pakistan has significant share, more than 96% in GCC Countries out of total migrant workforce all over the world. Saudi Arabia and UAE are the largest source destination countries for Pakistani manpower. At present, Saudi Arabia has the highest number of Pakistani labour force about 4892108 (50.90%), followed by 3180946 (33.10%) in the UAE. Other attractive destinations for Pakistani emigrants in the GCC are Oman 797828 (7.26%), Kuwait 182228

(1.90%), Bahrain 151851 (1.58%) and Qatar 135092 (1.41%). About 1.05% of the migrants proceeded to other Middle Eastern countries, whereas, 1.01% Pakistanis went to African countries for the purpose of employment.

Major shift of export of Pakistani manpower to especially to GCC Countries was seen in early 1970s. A number of pull and push factors were responsible for this movement. The demand for manpower in the Gulf increased many fold due to the increasing role of oil in the world economy and rise in its prices. Simultaneously, Pakistan was passing through a serious economic and political crisis.

Malaysia is another important market where more Pakistani manpower can be absorbed. To get the maximum benefit of emerging market, the Secretary, Ministry of Overseas Pakistanis and Human Resource Development had paid visit to Malaysia when the OEPs are also trying their level best to capture the Malaysian market. The manpower towards Malaysia is at rapid in many sectors including construction, agriculture, furniture etc. Malaysian exports include:

- Electronic equipments
- Petroleum & LNG
- Wood and Wood products
- Palm oil
- Rubber
- Textile
- Chemicals etc.

Moreover, Pakistani manpower is also inclined towards South Korea, as a large number of skills jobs are available in it. European Union (EU) countries are not traditional manpower importing countries. They used to hire Highly Qualified and Highly Skilled/Professional Pakistanis, whose percentage is lower than unskilled. Furthermore, EU countries used to urge their 27 states citizens to work within their union so that the pressure of immigration would be reduced.

The availability of large scale labour force from Pakistan owed to a combination of economic social and institutional factors: modernization of agriculture in Central and Southern Punjab which pushed out rural work force, the reversal of large scale industrialization which slowed

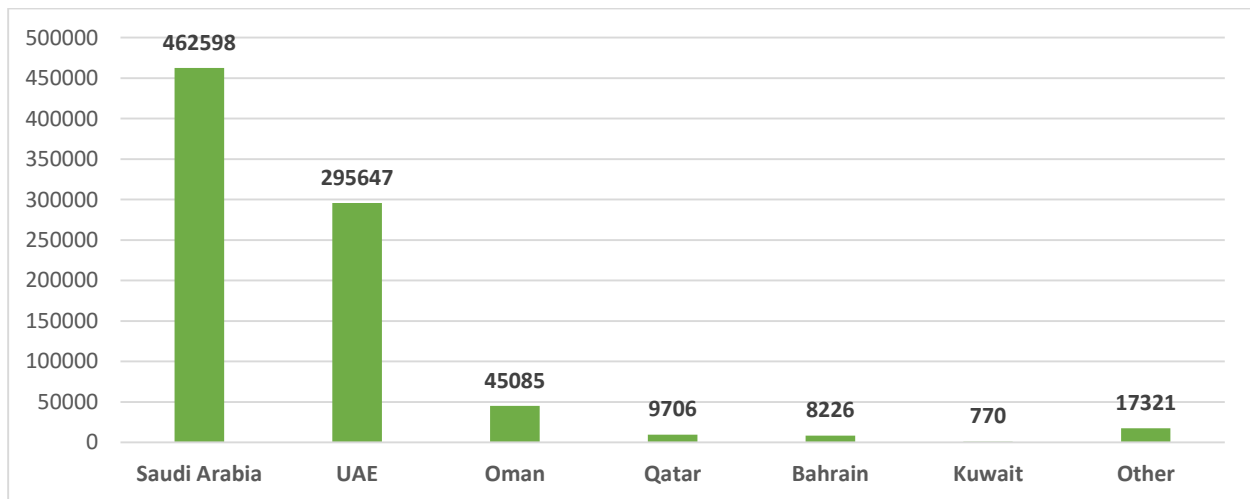
down the pulling capacity of urban centers like Karachi, and continuation of rapid population growth. In terms of social structures, there already existed the social acceptability of sending young males for extended periods of work to long distance destinations, while their families were cared for in extended family arrangements at their ancestral places. (Dr. Ijaz Shafi Gilani 2008)

The Pull factors in the labour importing countries were equally powerful during the same period and have been adequately documented elsewhere. Energy came to dominate global economic growth. Oil became the major source of energy, its prices rose and provided large sums of disposable money to countries which had extremely small population and whose physical as well as economic infrastructure was rudimentary.

In 2016, a total decline is witnessed by 107,218 as compared to 2015 mainly due to declining of oil prices which severely affected the economies of GCC Countries. The table 1 illustrates that there is more room available other than GCC countries and drastic measures are required for export of Pakistani manpower to other non-traditional countries. For this purpose, highly skilled manpower is required to capture the other markets/avenues. Government of Pakistan is fully aware of this fact and formulating the plans and policies accordingly. Training institutes' i-e NAVTEC/TEVTA are designing the course curriculum keeping in view the future market trends.

Country Wise Migration Trend in 2016.

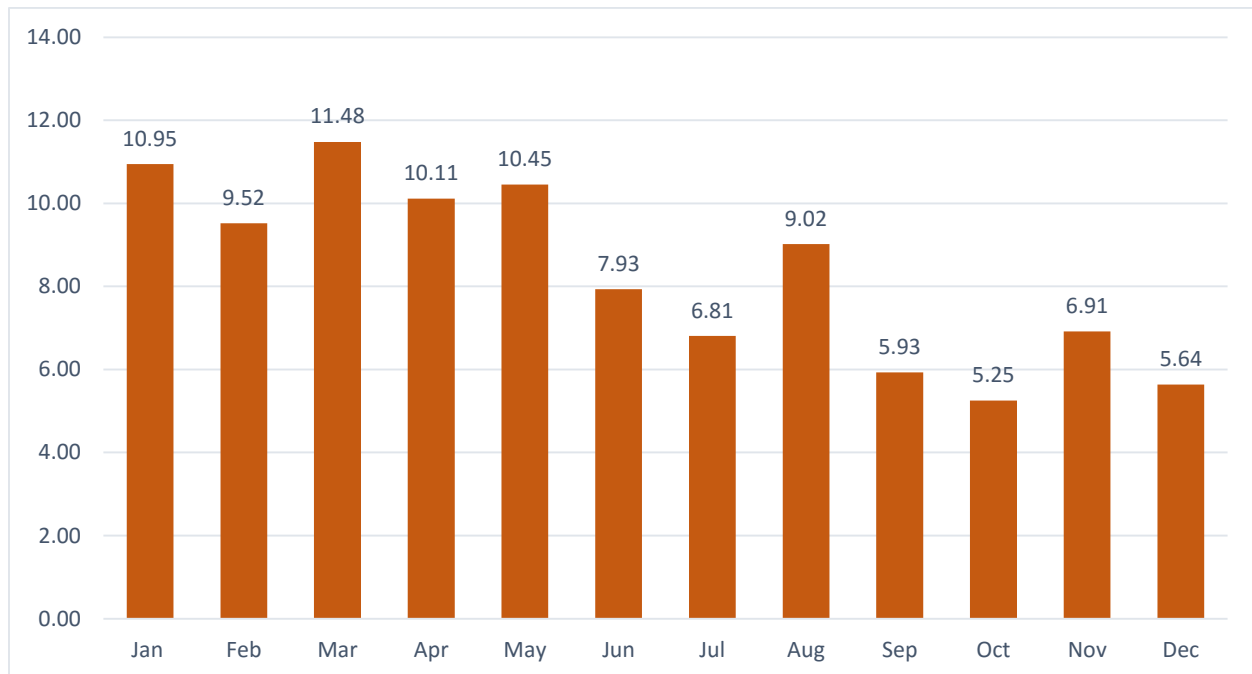
Graph :



The graph above indicates the pattern of migration especially to GCC countries during 2016. Saudi Arabia is the largest manpower import country where more than 55 percent of Pakistani workers went for employment followed by UAE 35%, Oman 5.37%, Qatar 1.16% and other countries 2.06 percent. GCC countries especially Saudi Arabia and UAE are traditional manpower import countries and the large strata of unskilled and semi-skilled labor force get employment opportunities specifically in infrastructure/ construction related activities. In other countries, the number of Pakistani emigrants is very low which needs to increase in future. The new market avenues for overseas employment other than Gulf Countries need to be discovered.

Month Wise Pattern of Migration in 2016

Graph :



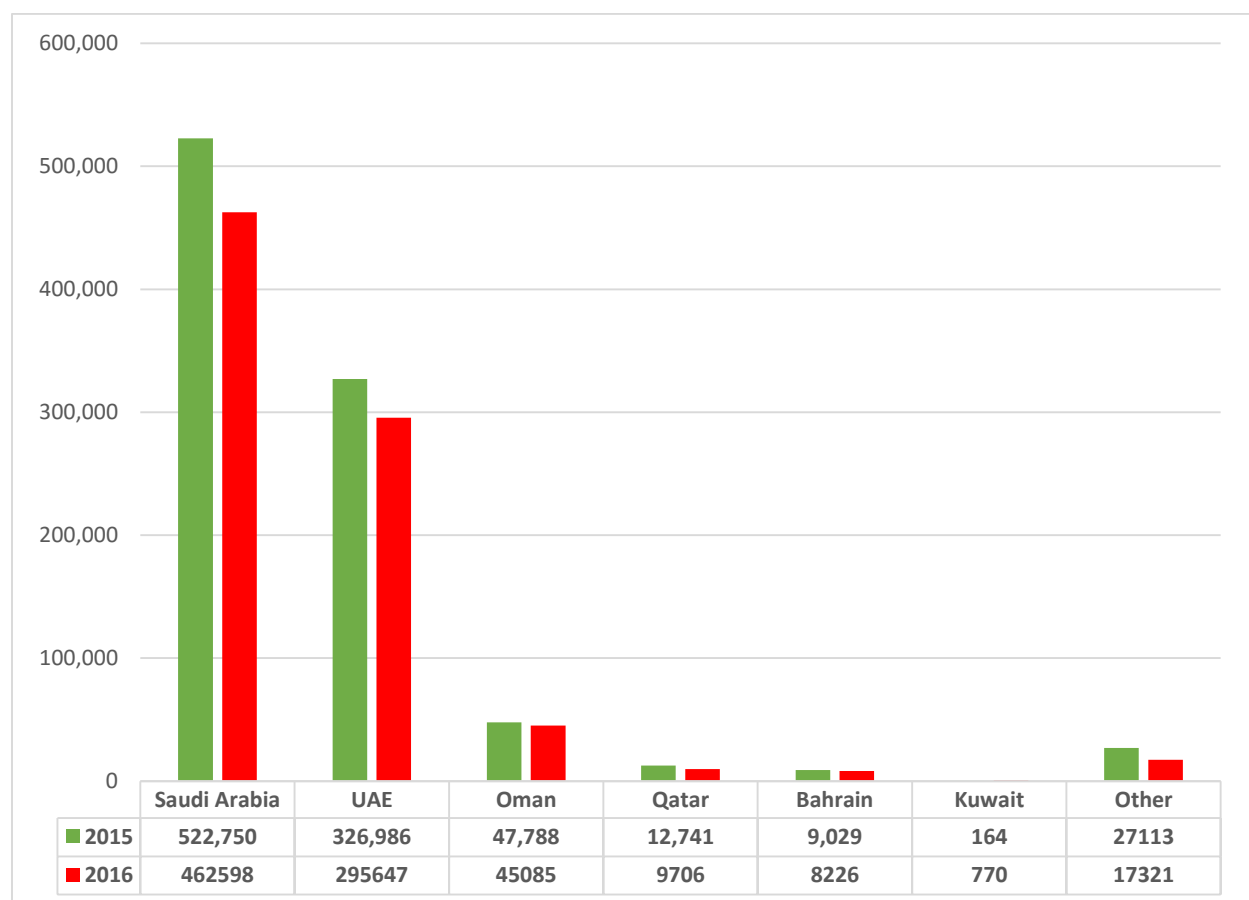
The above shows the month wise pattern of emigration. The trend reflects the growth from first half of the year and declining trend is observed in second half of the year. The month of March is more significant in which more than 11 percent emigrants proceeded abroad for employment. On the other hand, decline is seen from September to December 2016. In these months, major decline of Pakistan origin manpower is observed especially in Saudi Arabia. These stranded workers were in trouble since they did not have enough money to travel home, nor can they legally stay in Saudi Arabia because of which they were confined to company-owned camps in different parts of the Kingdom. Pakistanis migrant workers were not the only ones stranded in

Saudi Arabia without pay or their permits being renewed. About 20,000 Filipinos and 10,000 Indianans migrant were also stranded in Saudi Arabia. Government of Pakistan took notice of the issue and announced the relief package of Rs. 500 million for affected families.

In this connection a report was published in Daily Dawn on 7th February, 2017 which highlighted that 39000 Pakistani workers have been repatriated by Saudi Arabia in last four months due to violating the rules of residence and work.

Country Wise Comparison 2015-16

Graph :



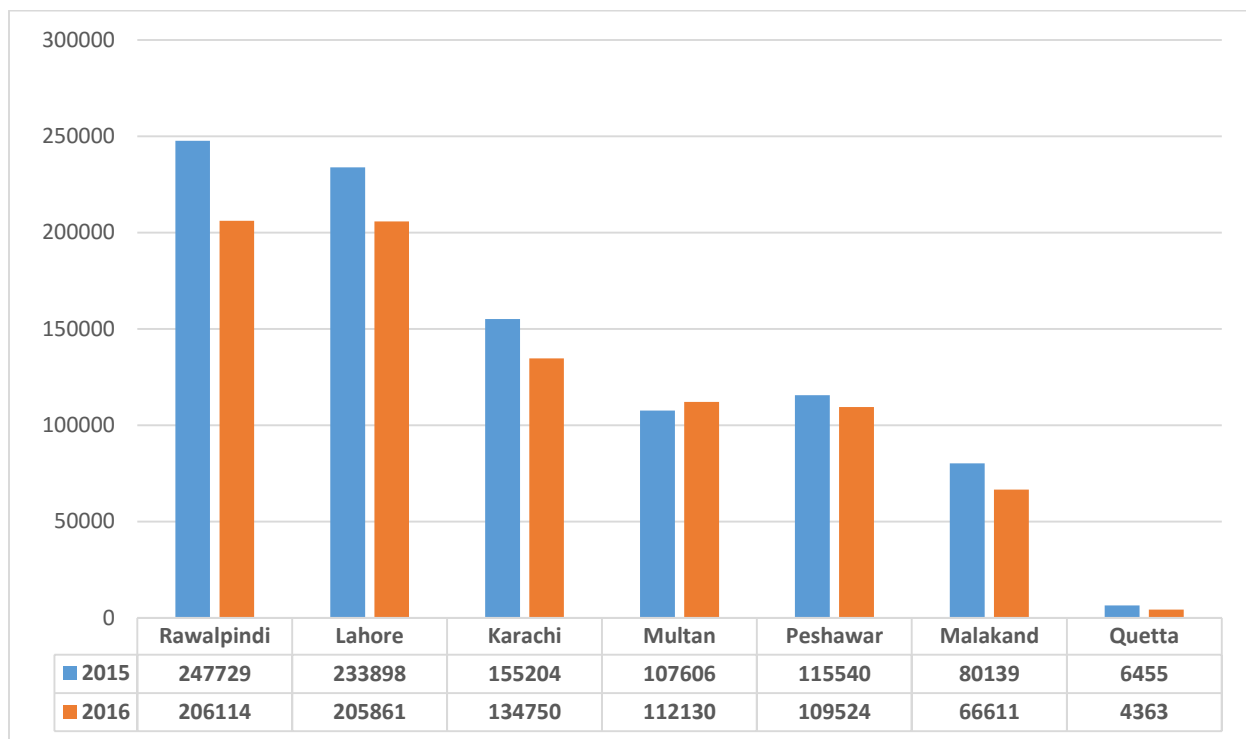
The chart indicates the country wise comparison of emigration process. It clearly indicates the declining trend in all the categories except Kuwait. In 2016, about 462,598 emigrants proceeded to Saudi Arabia as compared to 522,750 in 2015. Comparative analysis shows the 11 percent decline of manpower in 2016 followed by 9.58 % decline in UAE. Among GCC countries, major decline is observed in Qatar which is about 24 % compared to 2015. This area needs attention

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which needs to be focused because Qatar is an important manpower import country where a mega international event, FIFA World cup is going to be held on 2022. It will create millions of jobs and Pakistan Government is making efforts to utilize this opportunity. Due to constant efforts of Prime Minister, Government of Pakistan and Punjab Government, Emir of Qatar has announced the 100,000 jobs for Pakistani workforce. Technical training is essential for our future labour force in GCC to fully utilize this opportunity. In this regard, BE&OE is in collaboration with training institutes like NAVTTC/TEVTA for curriculum development of training courses.

Export of Manpower through Protectorate Offices 2015-16

Graph :



There are seven regional offices named as Protectorates of Emigrants. The overhead illustrates the protector wise export of manpower to other countries during 2015-16. The percentage wise protectors' data are as follows:

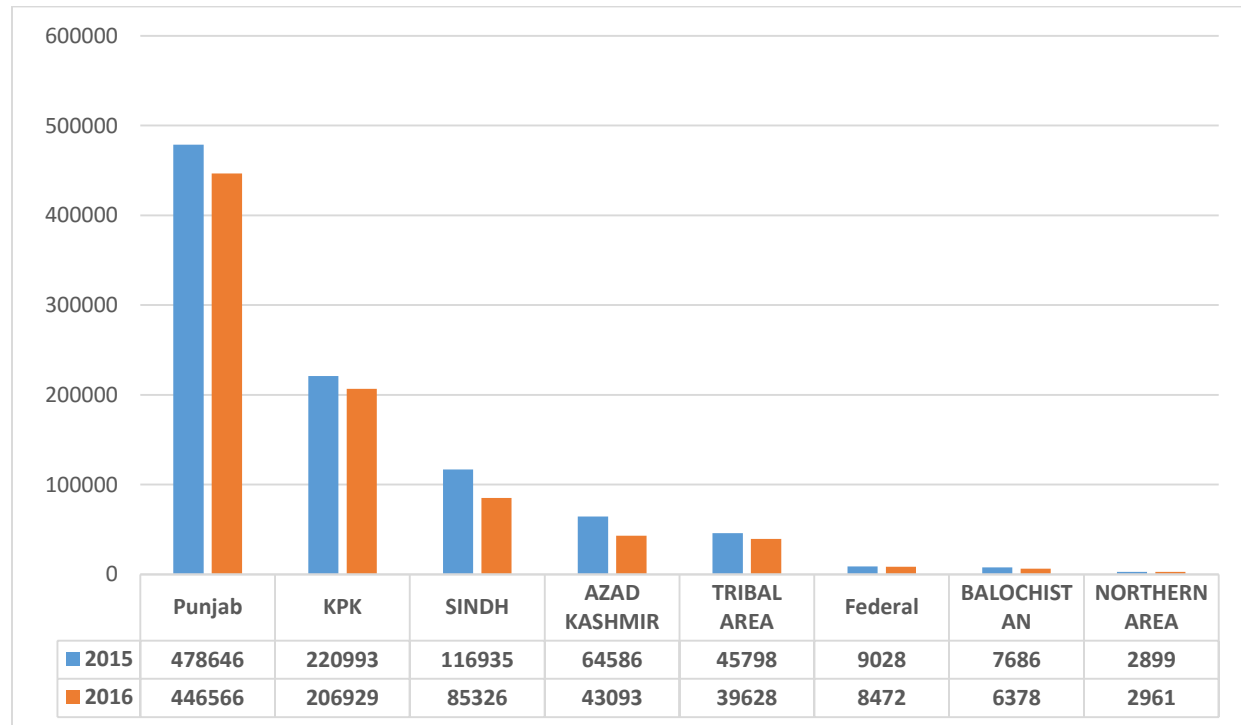
S.No.	Protector of Emigrant	Manpower Export	Percentage
1	Rawalpindi	206114	24.56%
2	Lahore	205861	24.53%
3	Karachi	134750	16.05%

4	Multan	112130	13.36%
5	Peshawar	109524	13.05%
6	Malakand	66611	7.94%
7	Quetta	4363	0.52%
	Total:	839353	100.00

Quetta is on the lower side, in terms of manpower export to other countries as compared to other protectorates. On the other hand Multan is the only protectorate where there was increase of 4524 (4.20%) as compared to 2015.

Province Wise Migration Trend (2015-16)

Graph:



(Source: Ministry of Finance 2015-16)

The graph above describes the province wise migration trend during 2015-16. Among the provinces, Punjab is the largest in terms of population. Its total share in population is about 55 percent followed by Sindh 23%, KP 13%, Baluchistan 5%, AJK 2.2%, Fata 2.3% and Gilgit Baltistan is 0.6%. As Punjab is the most populated province and its share in migration is higher 446,566 (53.20%) as compared to the other provinces. Its migration share is in line with its share

in total population. The second highest province in terms of migration is KP where 206929(24.65%) of emigrants proceeded abroad during 2016. It is interesting to note here that KP's share in total population is about 13 % but its share in migration is 24.65 % which shows the inclination of KP's people for overseas employment. Sindh stands on third where 85326(10 %) of the total emigrants proceeded abroad. The migration pattern is vice versa in Sindh and KP when the share of both the provinces in total population and migration is compared. The trend of overseas employment is quite positive in AJK and Tribal areas. The Baluchistan province is lagging behind in terms of migration and the low number of emigrants directly correlates with the low number of OEP's working in Quetta. According to the latest figures of BE&OE regarding active OEP's there are only 4 OEP's working in Quetta.

Skill Composition of Emigrants 2015-16

Graph:



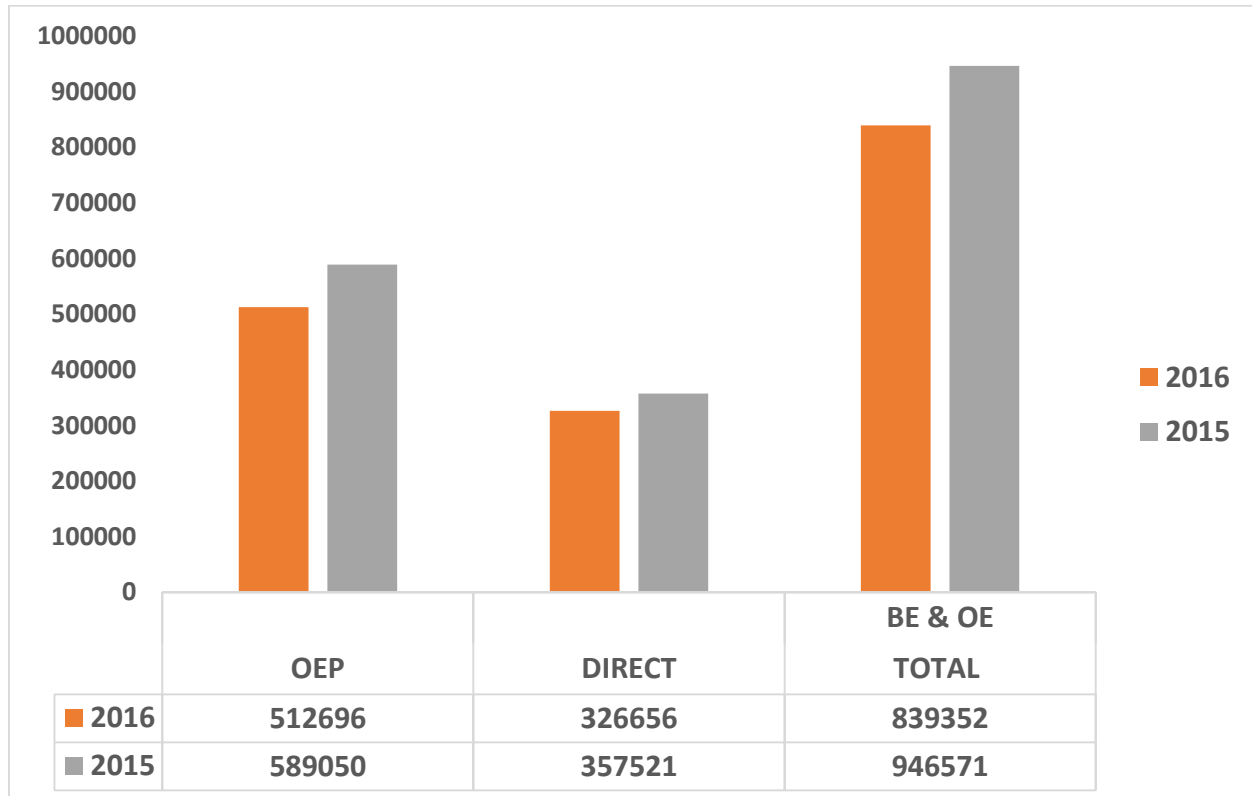
There are more than 40 occupation wise categories of emigrants and Bureau of Emigration and Overseas Employment has classified these categories into highly qualified, highly skilled, skilled, semi-skilled and unskilled.

During 2016, 16510 (2%) of the emigrants from Highly Qualified category proceeded abroad for employment which is 974 (5.57%) lower as compared to 2015. Similarly in Highly Skilled category, 8172 (1%) of the migrants proceeded abroad during 2016 which is 319 (4.06%) is lower comparing to 2015. On the other hand, decline is witnessed about 15.52% and 12.23% in skilled

and unskilled category respectively. Mild increasing trend only be seen in semi-skilled category in which 599 more migrants went abroad in 2016 as compared to 2015.

Manpower Export through OEP's and Direct Employment 2015-16

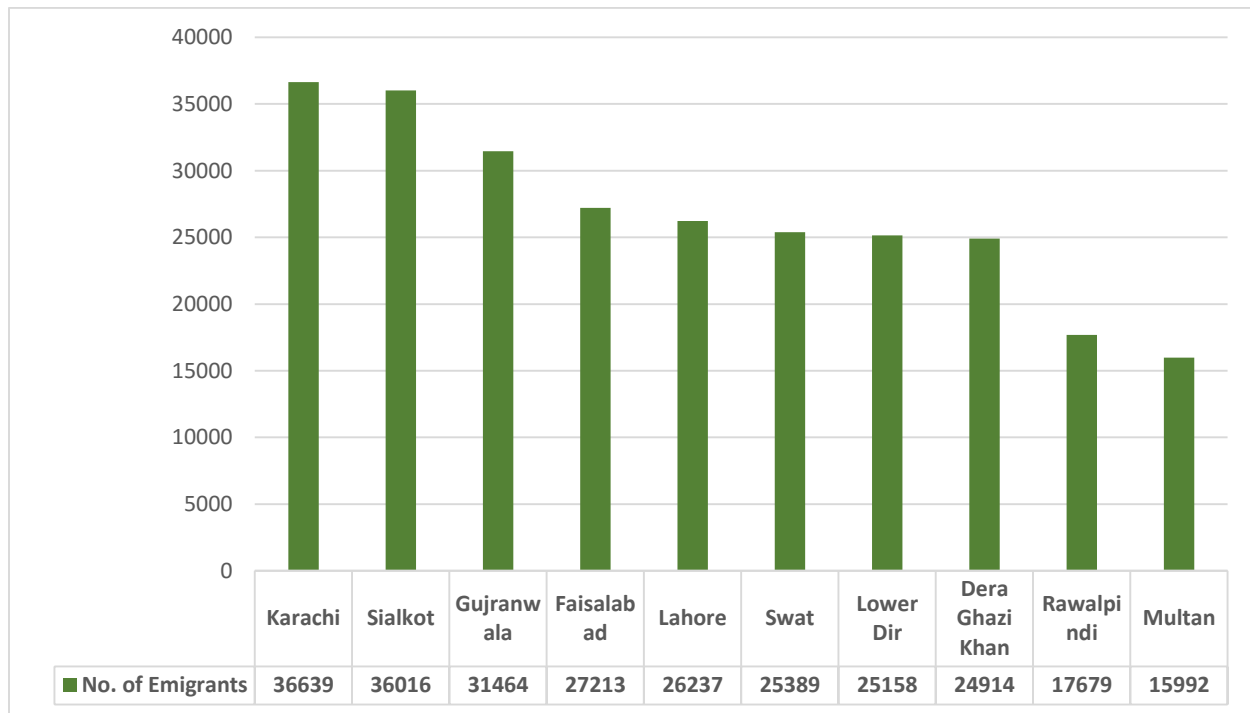
Graph :



There are two ways to go abroad, first through Overseas Employment Promoters (OEP's) and second is direct employment. OEP's are registered under BE&OE and playing active role for overseas employment. During 2016, About 512,696 people proceeded abroad for employment through OEP's which is 13% less as compared to 2015. On the other hand almost 9% decline is in direct employment.

Top 10 Districts for Manpower Export during 2016

Graph :



The above graph illustrates the top 10 origin districts for export of manpower during 2016. Karachi is on the top where 36,639 emigrants proceeded abroad followed by Sialkot 36,016 and Gujranwala 31,464. Traditionally, Karachi, Sialkot, Gujranwala and Faisalabad districts are considered the highly migration regions. Both Karachi and Sialkot were on the top migration sending districts during 2014 and 2015. In 2015, 69,491 emigrants proceeded abroad from Karachi but in 2016, a decline of 32,852 is witnessed which is about 47%. On the other hand in Sialkot during 2016, an increase of 2,125 is observed as compared to 2015. Similarly, in Gujranwala and Faisalabad, decline of 3.65% and 13.94% is seen but apart from this declining trend aforesaid districts are leading districts in 2016 in terms of manpower export to other countries. The following districts i.e. Lahore, Swat, Lower Dir, DG Khan, Rawalpindi and Multan also witnessed a decreasing trend in 2016 but these are still ranks in top 10 origin districts for export of manpower. The aforementioned districts in Graph 7 indicates that out of leading 10 districts, 7, 2 and 1 districts are from Punjab, KP and Sindh respectively.

Categorical Analysis of Emigrants in GCC Countries (2015-16)

There are various categories of overseas migrants. The increasing and declining trend is being discussed in Table 2 and 3. The export of manpower in following occupational categories increased during 2016.

(A) Top Increasing Categories During 2016

Table:

S.R #	Category	2015	2016	Increase
1	Waiter/Br.	6524	10648	4124
2	Foreman/Sup	7797	11095	3298
3	Plumber	17433	20126	2693
4	Cook	7755	10406	2651
5	Fitter	16513	18783	2270
6	Surveyor	5594	7472	1878
7	Manager	5025	6698	1673
8	Painter	20336	21847	1511
9	Denter	3248	4717	1469
10	Agriculturist	28660	30104	1444
11	Tailor	7851	9286	1435
12	Draftsman	2149	3494	1345
13	Storekeeper	2197	3324	1127
14	Doctor	2074	2779	705

The above table shows the increasing trend in the mentioned categories during 2016. It indicates that increasing trend is observed in the categories like Waiter, Cook, Tailor, Managers and Doctors. Generally the increase is seen in skilled, semi-skilled and high skilled categories. In

coming years, demand of skilled workers will increase even in conservative manpower import countries. The fall of oil prices has put pressure on oil based Gulf economies and they are making plans to reduce their dependence on oil based earnings. The introduction of Saudi Vision 2030 is one such example to uplift their economy. It is a plan to reduce Saudi Arabia's dependence on oil and rely on alternatives diverse resources economy and the development of service sectors such as health, education, infrastructure, constructive, recreation, tourism and many other sectors.

(B) Top Decreasing Categories in 2016

The decline in the export of manpower is witnessed in the following categories as compared to 2016.

Table:

S.R #	Category	2015	2016	Decrease
1	Labourer	338930	296661	-42269
2	Driver	140803	106296	-34507
3	Technician	41060	35092	-5968
4	Mechanic	21896	16658	-5238
5	Electrician	34571	29448	-5123
6	Steel Fixer	27372	22743	-4629
7	Operator	16897	12743	-4154
8	Carpenter	37341	33912	-3429
9	Welder	17047	15113	-1934
10	Mason	62313	61037	-1276
11	Engineer	6499	5453	-1046

The above table indicates that major decline is seen in categories of Laborer, Driver and Technicians etc. The decline in laborer category indicates that construction activities suffered in

GCC countries after fall of oil prices. Furthermore, the property business in GCC countries particularly in UAE remained on decline. Now the competition will increase in Gulf Countries especially in Saudi Arabia because Saudi Government is introducing various steps to increase the job opportunities for Saudi Nationals. For this purpose KSA has launched the **Saudization program**. It is the official national policy of Saudi Arabia in which there will be the replacement of foreign workers with Saudi nationals in various sectors. The Saudi Government took the decision to reduce unemployment among native Saudis, under the slogan 'Let's Put the Saudi in Saudization. These sorts of steps from Saudi Government will create tough competition for foreign workers in future.

SECTION IV

Reasons of Decline of Manpower During 2016

Major reasons of Declining the Pakistani Manpower in GCC Countries

A) General Reasons of Decline:

- Slumping oil prices have severely affected the countries in the Gulf Cooperation Council (GCC). This has lowered government revenues which have negatively affected spending plans and decline of manpower is also observed in India during 2016.
- The internal situation of Middle East, especially the Yemen war created economic hurdles especially for Saudi Arabia. Saudi Arabia had the “world’s third largest military budget, trailing only the U.S. and China is creating burden on its economy.
- During the FY 2015-16, 618,650 Pakistanis proceeded abroad through Overseas Employment Promoters. In the same period, 812,074 demands were received. The difference between demands and permissions indicates the lack of matched manpower demand from Pakistan.

B) Reasons of Manpower Decline in Saudi Arabia.

- Kingdom of Saudi Arabia (KSA) took laws for the first time in history in order to support its dwindling economy. The Kingdom of Saudi Arabia (KSA) slashed its transport and infrastructure budget in 2016 by 63% compared to 2015. The world’s biggest oil exporter is projecting a budget deficit of \$87 billion in 2016. The higher budget deficit leads Saudi Arabia to cut down the development projects. Due to aforementioned reasons, Saudi Arabia approached the World Bank for economic assistance for the first time in history.
- Saudi Arabia’s public departments have delayed payments to the government contractors and they seek to slash contract prices. Late payments have posed challenges to the construction industry. The previous year witnessed an increase in commercial disputes.
- After emerging this issue, many workers including Pakistanis returned to their native countries on their own. Though the number of returnee emigrants was minor (between 5000 to 11000) but media focused this issue to a large extent and due to media hype, there was a psychological impact on people and they are now hesitant to go to GCC

countries. This situation directly disturbed the salary structure of the workers. Due to the impact of low salaries, people were reluctant to go especially to Saudi Arabia.

- The government sector dominates the Saudi economy. More than 70% of the workforce is employed by the government. Due to cut in Government spending's on construction related projects, it affected the labour class and our data in previous tables is testifying this fact because major decline is seen in labour category. Decline in labor category correlates the decline in construction activities.
- The **kafala system** means sponsorship system, is a system used to monitor migrant laborers working primarily in the construction and domestic sectors, in Lebanon, Bahrain, Iraq, Jordan, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE. The system requires all unskilled laborers to have an in-country sponsor, usually their employer, who is responsible for their visa and legal status. The Kafala system further discouraged the emigrants to go to aforementioned countries.
- The strict labour laws, the mandatory stringent kafala system & the strained/imprisoned emigrants are the major reasons of manpower decline in GCC countries.
- In Q1 2016, the construction contract awards in Saudi Arabia dropped by 51% as compared to Q1 of 2015. Due to decline in constructions contracts, a major decline was seen in labourer category.

C) Reasons of Decline in UAE and other GCC Countries.

- In 2016, the magnitude of investments made by Pakistanis in the commercial capital of the UAE has dropped significantly.
- According to the Dubai Land Department (DLD), the share of Pakistani investors in the Dubai property market in 2016 stood at AED 4.4 billion (\$1.2bn), a 42.8 per cent decline compared to the previous year. The major reason behind a decline in the investment of Pakistani citizens was a fear that the UAE government would share their bank details with the Pakistani government.
- Oman expects 11% decline of overall spending and 18% reduction of project investments in 2016.

SECTION V

IMPACT OF LOW OIL PRICES ON GCC COUNTRIES & MEASURES TO COPE THE SITUATION

Impact of Dwindling Oil prices on Real Estate and other Sectors in GCC countries

The year 2016 witnessed a dip in property values in Dubai, Abu Dhabi and Sharjah. There was a major drop in Qatar's leasing activity, with smaller office space in demand. According to *Construction Week Online, Saudi real estate transactions decline in Q1 of 2016*. On the other hand, increased supply of hotel rooms and lower demand from business visitors decreased the growth in average room rates in the UAE. The outlook of tourism infrastructure remains positive with the delivery of Dubai Parks, Expo 2020 and investments in tourism infrastructure. According to the "*Middle East hotel benchmark survey report 2012-16*, the hospitality segment is experiencing a short-term decline. In 2015, rooms yield remained stable for Doha and Jeddah, while Dubai and Abu Dhabi witnessed a slight decline of 6.3% and 5.0%, respectively. But the retail segment is forecasted to benefit from upcoming mega events. Supply of retail space in Qatar is projected to double by 2019.

Measures Adopted by GCC Countries to deal the Situation

GCC Countries adopted the following measures to cater the situation.

1) Saudi Arabia:

Saudi Arabia has adopted following steps to revive its economy after lowering the oil prices.

I. Issuance of Royal Decrees:

Saudi government issued several royal decrees to deal with the situation. Different economic packages were announced to provide relief to the masses. Furthermore, various orders were issued to cut the extra expenditures in government offices to maintain the fiscal balance.

II. Announcement of Vision 2030.

The Saudi Government started a major project, known as Vision 2030, aimed at overhauling the economy, reducing the dependence on oil and creating a more productive native workforce. Moreover, Saudi Arabia introduced the KSA's Musanid Platform for admitting domestic workers from other countries especially Bangladesh.

III. **Establishment of Sovereign Fund:**

Saudi Arabia will make efforts to transform the Saudi Public Investment Fund to sovereign fund assets valued to \$2.5 trillion, making it the largest globally sovereign funds in the world. Deputy Crown Prince explained that the fund will control more than 10% of the investment capacity in the globe, and the estimated size of the property by more than 3% of global assets. He added that Saudi Arabia will be the backbone of investment through the fund, which will be a key driver of the globe and not just on the region.

IV. **Public Offering of Aramco:**

Saudi Arabia will offer less than 5% of the giant national oil company Aramco public offering on the stock exchange and will allocate the proceeds of IPO to finance the Saudi sovereign wealth fund, and Aramco is part of the main keys of the economics of the vision so, the company is a part of several benefits notably transparency, if Aramco raised in the market means you must announce their lists and become under the control of all the Saudi banks and all the analysts and thinkers Saudis, and the entire international banks. Aramco is expected to assess the overall by more than \$2 trillion.

V. **Green Card System:**

Deputy Crown Prince announced that Saudi Arabia will apply green card system within five years in order to improve the investment climate, and that the system will enable the Arabs and Muslims from consuming live in Saudi Arabia, and that the Kingdom will open tourism to all nationalities in line with the values and beliefs of the country. That the comprehensive reforms planned, including the green card system will be applied even if oil prices rose above \$70 a barrel again.

VI. **Target of 30 million pilgrims:**

Saudi Arabia is planning to increase the number of pilgrims every year from 8 million to 80 million by 2030 and that the work of the development of infrastructure as an airport

Jeddah, Taif and the new airport will support the plan, in addition to the development of infrastructure in Mecca and investment areas surrounding the Haram al-Makki.

VII. **Women Participation:**

The plan aims to increase the participation of women in the labor market from 22% to 30%, and reduce the unemployment rate among Saudis from 11.6% to 7%. Saudi Arabia is seeking to increase the contribution of the private sector in the gross domestic product from 3.8% currently to 5.7%.

VIII. **Taxation Measures:**

Saudi Arabia is focusing on new tax rules and regulations and imposed 2.5% white land tax on undeveloped urban land. Similarly, it has made various categories of foreign manpower and introduced different slab rates for taxes. The high foreign manpower category will be imposed more tax than others. Furthermore, Saudi Arabian General Investment Authority (SAGIA) allows 100% foreign ownership in retail and wholesale business. Saudi Arabia has imposed tax on sending the remittances to other countries. Similarly, cost of visa has also increased to generate revenue.

2) United Arab Emirate (UAE)

UAE also introduced different steps and some major steps are as follows:

I. **Announcement of Vision 2021 and World Expo 2020:**

UAE is prioritizing on high infrastructure spending as part of the World Expo 2020 and UAE Vision 2021 and reduce oil sector contribution to GDP to 20% by 2025. Now after the fall of oil prices, Gulf countries are taking various steps to reduce their dependence on oil based earnings.

II. **Focus on Skill Development of Workers:**

UAE is focusing on skill development of workers and following four institutions have been accredited by UAE Government under the Pilot Project on Skills Up gradation Accreditation of Vocational Training Centre in Pakistan:

1. Institute of Technical & Professional Education, Rawalpindi,

2. College of Technology, Rasul Mandi Bahauddin,
3. Construction Technology Training Institute, Rawalpindi,
4. Applied Technologies Institute, NLC, Mandra with the collaboration of Group of Arfat Tirocinium (UAE).

3) **Qatar**

Qatar is working to introduce new laws, events and minimizing the government spending. It showed commitments to infrastructure projects through FIFA World Cup 2022 Qatar, National Vision 2030 and Qatar National Tourism Strategy 2030.

4) **Bahrain**

Bahrain is also making new laws and cutting down on the government spending. The Bahrain Economic Development Board (EDB) is committed to invest over US\$20b on industrial and infrastructure projects in the coming years.

5) **Kuwait**

Kuwait is focusing on Public Private Partnership model initiatives. It has introduced the development plan 2015–20 focuses on economic reforms and infrastructure projects.

6) **Oman**

Oman introduced a five year (2016-20) development plan aims to reduce contribution of oil in GDP to 26% and introduced new electronic system to protect people from unscrupulous brokers.

SECTION VI

Overseas Employment Promoters (OEPs)

An Overseas Employment Promoter (OEP) gets a license under section 12 of the Emigration Ordinance 1979. These OEP's are playing a pivotal role to increase the overseas employment in the country. The OEP license empowers them to make contracts with renowned employers of different countries especially Gulf countries to get manpower demand for Pakistani workers.

At present, more than 2195 active OEP's are working across the country. The protector/city wise detail of OEP's is as under:

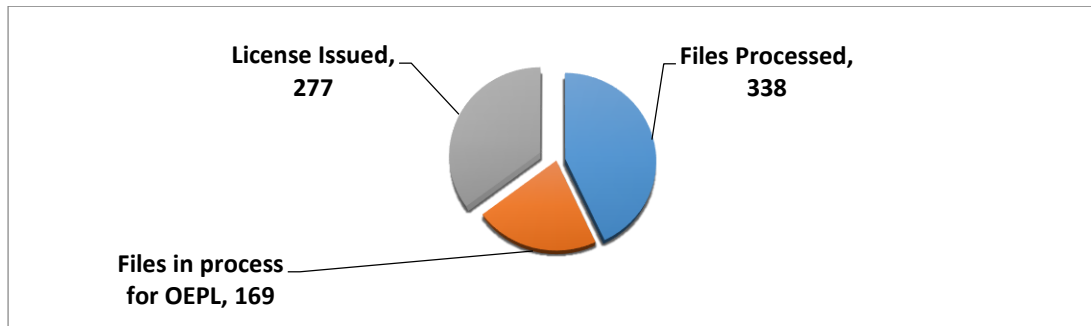
Table :

Protectorate Offices	Total Valid Licences	%
Rawalpindi	772	35.2
Lahore	438	20.0
Karachi	351	16.0
Peshawar	225	10.3
Malakand	216	9.8
Multan	189	8.6
Quetta	4	0.2
Active Licenses	2,195	100

The table above indicates that the majority of the OEP's (772) are operating in Rawalpindi region followed by 438 in Lahore and 351 in Karachi. In Quetta only 4 OEPs are working which is very low as compared to other regions of the country. The above data illustrates that majority of the OEP's 772 and 438 are operating in Rawalpindi and Lahore followed by Karachi where 351 OEP's are working. About 55 % of the OEPs are registered only in Rawalpindi and Lahore. Moreover, a significant number of OEPs are actively working in Peshawar and Malakand regions. The presence of large number of OEPs in these areas clearly reflects the priority of people of these regions to go abroad for employment. The possible factor of people of Northern areas to go abroad is the small landholdings and weak industrial base. This situation encourages them to go to other countries for employment.

Issuance of Licenses to OEPs during 2016

Graph:



During the year 2016, after interview of applicants, 338 files processed in order to get Overseas Employment Promoter Licenses. In the same period, 235 files submitted to Ministry of Overseas Pakistanis and Human Resource Development (OP&HRD) after approval of the Director General. Currently, 169 files for OEPL are in process for submission to the Ministry of OP &HRD. Finally, 277 licenses were issued till December 2016.

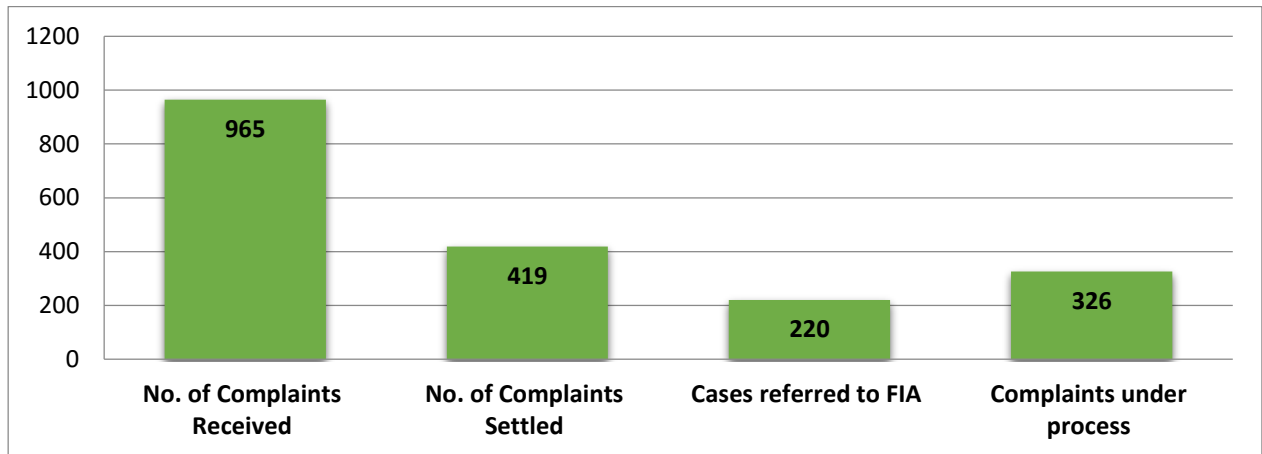
Complaints against OEP's (2010-16)

There is mechanized system operational to address the complaints against OEPs under the directions of Honorable Federal Ombudsman. The Graph 11 highlights the complaints received from 2010 to 2016. During this period, about 965 complaints received against OEP's in which 419 complaints have settled while 220 cases were referred to FIA and 326 complaints are under process.

Overseas Employment Promoter who indulges in malpractices and illegal activities is dealt with the following procedure under Rule 28, 29 & 30 of the Emigration Rules, 1979, as the case may be:

- Their license is suspended or cancelled for a specified period and security is forfeited in whole or part.
- Apart from that, cases registered in special Courts to inquire/investigate the offences in which imprisonment which may extend to 14 years.
- During 2015 and 2016, Penalty of Rs. 10.51 Million imposed on OEPs.

Graph:

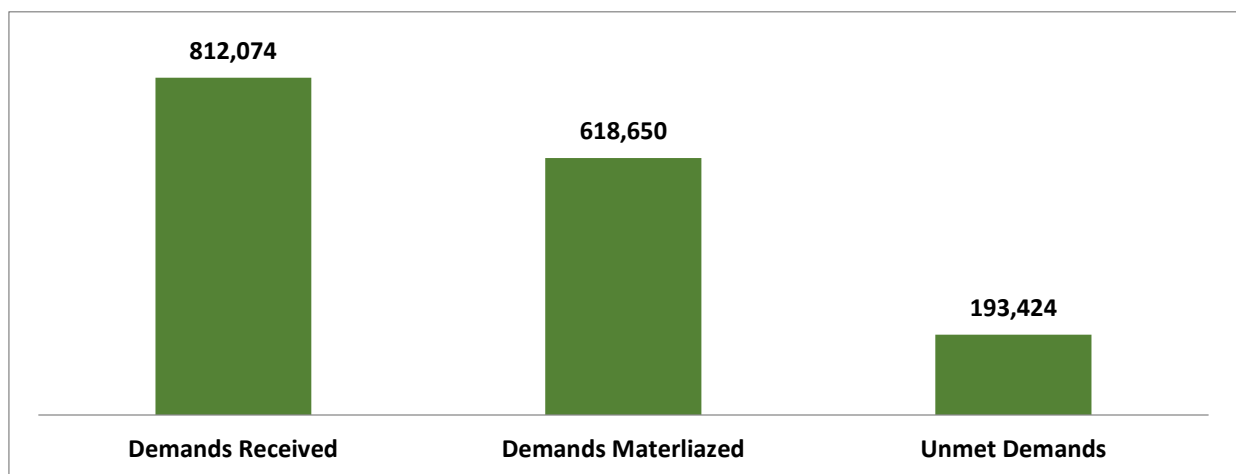


Demands and Permissions during FY 2015-16

During the FY 2015-16, 618,650 Pakistanis proceeded abroad through Overseas Employment Promoters. In the same period, 812,074 demands were received. The net difference/ gap between proceeded emigrants and demands is 193,424.

Directorate of Coordination is responsible for the issuance of Overseas Employment Promoters License (OEPL). It coordinates with the potential applicants and provides all the relevant information regarding OEPL. This directorate reviews the applicant’s documents and arranges the interviews for OEPL with the Director General. It shares the particulars of applicants with the Intelligence Bureau and concerned authorities for their verification. Moreover, it submits complete cases of licenses to the Ministry of OP&HRD.

Graph :



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After receiving instructions from Ministry of OP&HRD, this directorate provides information to the applicants regarding the demand notice etc. After approval of licenses, the information is shared with Directorate of Operations, P.E offices and Directorate of I.T for uploading the same on website.

SECTION VII

DEATH/DISABILITY CLAIMS & REMITTANCES

Death and Disability Claims by Emigrants during FY 2015-16

There is compulsory insurance Scheme for Pakistanis proceeding abroad for employment introduced since February 1982. The Scheme is being implemented by Bureau of Emigration and Overseas Employment under Rule 22-A of Emigration Rules 1979 through State Life Insurance Corporation.

Under the scheme every intending emigrant is insured for Rs.10,00,000/- (one million) against one time premium of Rs.2000/- for the period of two years, with disability coverage where applicable. Insurance Coverage is renewable for another period of 2 years on payment of Premium of Rs.2000 if an emigrant desires.

The Premium is collected directly by the State Life insurance Corporation of Pakistan and a fund is created named “State Life Emigrant Insurance Fund” (SLEIF).The operations, regulation and expenditure from SLEIF are governed through SLEIF Expenditure Rules 2007. As per directions of the Federal Ombudsman it was decided that Insurance Coverage period will be enhanced from 2 to 5 Years with a slight increase in premium from Rs. 2,000 to Rs. 2,500.

Table : (Death and Disability Claims paid from 2008-16)

Year	Death	Death Claims Paid (in Millions)	Disability	Disability Claims Paid (in Millions)
2008	313	93.9	49	4.74
2009	378	113.4	64	13.11
2010	379	113.7	46	5.03

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2011	403	133.45	51	7.06
2012	329	296.8	60	17.39
2013	455	400.8	54	31.39
2014	702	710.41	78	29.03
2015	566	557.08	84	29.63
2016	804	797.78	120	58.14
Total	4329	3217.32	606	195.52

The table reflects the death and disability claims paid to the Pakistani migrant workers since 2008 to 2016. During 2016, Rs.797.78 million was paid against 804 death claims. Similarly, Rs. 58.14 million paid against the disability claims.

Foreign Remittances

Foreign remittances play a major role to stabilize the economy because they make up half of the import bill and are an important source to cover up the trade deficit of the country. Remittances constitute one of the largest and more resilient sources of foreign exchange earnings for developing countries including Pakistan.

The flow of workers' remittances to Pakistan has grown steadily over the past years rising from 8905 million dollars in 2009-10 to 19,954 million dollars in 2015-16. Foreign remittances in Pakistan continued to exhibit a rising trend over the last one decade. The contribution of remittances in Pakistan's economic development has been widespread. It has helped revive economic activity; created employment opportunities; reduced poverty; improved the living standards of the recipient families; prevented the balance of payment crisis; built foreign exchange reserves; provided stability in exchange rate and improved the country's credit rating.

Table:

YEAR	US \$ IN MILLIONS
2009-10	8905.95
2010-11	11200.9
2011-12	13186.58
2012-13	13920.26

2013-14	15832.25
2014-15	18,454.04
2015-16	19,954.96
2016-17 (Upto December)	9,458.66

During the first six months (July-December) of FY 2016-17, overseas Pakistanis sent 9.46 billion US dollars remittances down 2.27% compared to 9.68 billion dollars the country received during the same period in preceding year. Pakistan's remittances decreased like many other countries due to global economic slowdown especially the slumping oil prices.

According to the World Bank's "Migration and Remittances Fact book 2016", Pakistan is one of the top five emigration countries in South Asia.

Table:

Item	December	November	December	Jul-Dec				
				Amount			YoY growth (percent)	
				2016	2016	2015	FY17	FY16*
Cash	1,584.17	1,616.43	1,616.13	9,458.66	9,688.34	9,162.16	-2.37	5.74
1. USA	182.17	193.98	208.05	1,163.54	1,304.81	1,409.52	-10.83	-7.43
2. U.K.	181.85	192.80	190.57	1,094.46	1,251.42	1,212.51	-12.54	3.21
3. Saudi Arabia	475.75	465.19	501.99	2,734.93	2,895.55	2,649.83	-5.55	9.27
4. UAE	339.93	362.71	339.53	2,117.81	2,172.54	1,986.75	-2.52	9.35
Dubai	216.65	224.95	217.84	1,322.40	1,466.29	1,032.84	-9.81	41.97
Abu Dhabi	119.36	132.78	116.20	768.87	670.30	920.81	14.71	-27.21
Sharjah	3.48	4.34	5.26	23.07	35.07	32.54	-34.22	7.78
Other	0.44	0.64	0.23	3.47	0.88	0.56	294.32	57.14
5. Other GCC Countries	203.63	193.12	209.50	1,154.22	1,172.00	1,050.59	-1.52	11.56
Bahrain	37.03	35.35	40.73	196.98	236.34	177.30	-16.65	33.30
Kuwait	63.41	64.06	68.55	386.49	364.86	378.42	5.93	-3.58
Qatar	35.66	29.98	33.01	184.69	179.90	164.53	2.66	9.34
Oman	67.53	63.73	67.21	386.06	390.90	330.34	-1.24	18.33
6. EU Countries	35.08	37.03	35.25	230.30	192.03	198.09	19.93	-3.06
Germany	6.89	7.16	7.58	45.08	40.08	42.50	12.48	-5.69
France	3.92	3.92	2.74	24.44	14.57	15.05	67.74	-3.19
Netherlands	0.4	0.48	0.42	2.60	2.22	1.71	17.12	29.82
Spain	2.76	2.79	4.30	20.76	25.20	27.70	-17.62	-9.03
Italy	4.11	4.32	3.28	29.11	18.89	16.98	54.10	11.25
Greece	1.74	1.71	0.72	11.10	2.26	8.20	391.15	-72.44
Sweden	1.31	1.40	1.48	8.54	6.61	6.51	29.20	1.54
Denmark	0.9	0.79	0.70	5.97	4.71	8.76	26.75	-46.23
Ireland	12.31	13.73	13.45	78.34	74.06	67.51	5.78	9.70
Belgium	0.74	0.73	0.58	4.36	3.43	3.17	27.11	8.20
7. Norway	3.06	3.60	3.11	20.96	14.36	15.67	45.96	-8.36
8. Switzerland	2.09	2.18	2.29	12.14	11.35	15.88	6.96	-28.53
9. Australia	15.41	16.71	16.97	97.10	91.63	91.05	5.97	0.64
10. Canada	14.96	15.19	13.68	87.81	78.67	100.55	11.62	-21.76
11. Japan	0.92	1.33	1.11	7.26	5.37	3.83	35.20	40.21

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EXPORT OF MANPOWER ANALYSIS 2016, BE&OE

12. Other Countries	129.32	132.59	94.08	738.13	498.61	427.89	48.04	16.53
II Pak.Rs. of Foreign Exchange	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	1,584.17	1,616.43	1,616.13	9,458.66	9,688.34	9,162.16	-2.37	5.74

(Source State Bank of Pakistan
2016)

The table above illustrates that inflows from Saudi Arabia were the largest source of remittances in November, December which amounted to 475.75 million \$ down from 501.99 million \$ during the preceding fiscal last year. On the other hand in UAE, remittances increased in December as compared to the same month in previous year. Remittances from UK and USA also decreased from 1251 million \$ and 1304 million \$ to 1094 million \$ and 1163 million \$ respectively during first 6 months of FY 2017 as compared to FY 2016. In other GCC countries remittances declined about 1.52 in FY 2017 as compared to same period in previous year. Moreover, flow of remittances increased from different EU countries. But in first half of FY 2017, remittances declined about 2.37 percent comparing to the same period of previous year.

SECTION VIII

ACHIEVEMENTS, FUTURE PLANS AND SUGGESTIONS

This section presents the other achievements which were made during 2016 by Bureau of Emigration and Overseas Employment. Further, it highlights the future plans and suggestions to improve and facilitate the migration process.

Achievements during 2016:

The BE&OE made following achievements in 2016.

A. Export of Manpower

Since 1971, more than 9.6 million Emigrants have been registered with the Bureau of Emigration & Overseas Employment. During the year 2016, about 839,353 Pakistanis proceeded abroad for Employment which is still the second highest number in the history of BE&OE.

B. Computerization Measures taken in 2016

Different computerization measures were taken to compete with the digital world. A new dynamic and informative Bureau's website was launched with a complete Urdu version. Moreover, general public information & complaints also redressed through social media (Facebook Page & YouTube Channel). More than 4200 Overseas Employment Promoters (OEP) Licenses information have been computerized and is readily available at Bureau's website. Further, regularly updated News and Complaints Decision Section for general public information was also prepared.

C. Formation of One Window Facilitation Desks

According to the directions of the Honorable Supreme Court of Pakistan and Federal Ombudsman, one window facilitation desks were established on eight international airports of the country including Islamabad, Peshawar, Lahore, Quetta, Multan, Sialkot, Faisalabad and Karachi in accordance with the emerging trends and to proper implement the Emigration Rules, 1979.

D. Promotions & Appointments in 2016

During the year 2016, 15 employees have been promoted in different grades while 50 employees have been initially appointed/recruited in different grades. . About 64 new posts of different cadres were created and several posts upgraded from BS-7 to BS-14.

E. Establishment of Different Cells

Two different cells were created during 2016 to address the complaints. First, a complaint cell has been established at the Bureau HQs Islamabad to redress the complaints. SOPs of the Complaints has been revised and circulated to all the relevant stakeholders. Second, A Pensioners Cell has been established at the Bureau HQs Islamabad for speedy disposal of Pension Cases.

Future Plans

There are several plans in pipeline which will be implemented in near future.

1. E-Protector Automation Scheme:

A project is in pipeline namely “Registration of Intending Emigrants via Bio Metric Verification System Linked with NADRA”. The intending emigrants will be registered through this bio metric system at P.E offices. It will ensure transparency and help to streamline the process. It will also reduce the delays and malpractices. To implement this project, a Memorandum of Understanding (MOU) has been signed with NADRA. PC-1 for the project is submitted to the Development Working Party (DWP) constituted by the Ministry of OP& HRD. The DWP has approved the project and it will be implemented in near future.

2. Formation of New Protector Offices:

To facilitate and enhance the export of manpower to other countries, formation of new protectorate offices are under consideration in Islamabad and Sialkot.

3. Increase of State Life Insurance Coverage:

A plan is under consideration to enhance the State Life’s Insurance Coverage Period from (2) years to (5) years. A meeting with State Life Insurance Corporation (SLIC) was held on 22-12-2016 and the SLIC authorities were convinced to enhance coverage to five years at slightly increased premium from Rs. 2000/- to Rs. 2500/- per emigrant.

4. Establishment of UAN/ Helpline and One Window Fee Collection Desk:

A plan is under process to establish the UAN/Helpline for the welfare of the emigrants. The matter is in consultation with NTC for provision of 3 telephone lines/numbers for installation of UAN. Moreover, the plan of establishing the One Window Fee Collection Desk is in process. The matter is under active discussion with National Bank of Pakistan (NBP), OPF and State Life.

5. Other Plans:

A plan is under process to devise the emblem and flag of the Bureau of Emigration and Overseas Employment. Furthermore, Standard Logo Operating Procedures (SOPs) are devised regarding the working of inspectors on airports to streamline the emigration process.

Steps taken by Government of Pakistan/ BE&OE to Capture New Market Avenues

Government of Pakistan/ BE&OE is adopting various steps to capture the new market avenues for export of Pakistani manpower to other countries. Some of the steps are as follows.

- I. The Prime Minister of Pakistan paid a follow up visit in February 2016 to Qatar after Emir of Qatar announced 100,000 Jobs from Pakistan for its FIFA World cup 2022 in which 2 million foreign manpower is required. A number of Memorandums of Understanding (MoUs) in the field of Health, Radio & Television, Education & Research and a Long-term Sale/Purchase Agreement (SPA) of LNG are signed by both sides. The aforesaid agreements will create Employment opportunities for Pakistanis in Qatar.
- II. Various steps are under consideration to capture the manpower market of UAE with special reference to Dubai Expo, 2020. There will be the demand of skilled workforce in future and Government of Pakistan is cognizant to the fact and working on skill development of workers. To meet the demand of skill development, BE&OE is in liaison with the NAVTTC & TEVTAs for the curriculum preparation as per international standards especially to GCC countries.

- III. Government of Pakistan is working with UAE for upskilling and certified manpower so that they would be able to compete with the emerging market needs in UAE. In this regard following four institutes have been accredited by UAE Government under the Pilot Project on Skills Up gradation Accreditation of Vocational Training Centre in Pakistan.
1. Institute of Technical & Professional Education, Rawalpindi,
 2. College of Technology, Rasul Mandi Bahaudin,
 3. Construction Technology Training Institute, Rawalpindi,
 4. Applied Technologies Institute, NLC, Mandra with the collaboration of Group of Arfat Tirocinium (UAE).
- IV. The Bureau of Emigration & Overseas Employment is playing an active role at the following International Forums with the aim to maximize the manpower export from Pakistan to different countries of the world and to resolve the issues of Pakistani Migrant Workers. These are ILO, IOM, Colombo Process, Abu Dhabi Dialogue, Global Forum on Migration and Development (GFMD), WHO (World Health Organization) and Budapest Process.
- V. Pakistan have signed various MOUs in the field of labour and manpower with Algeria, Saudi Arabia, UAE, Kuwait, Qatar, Oman, Malaysia, South Korea and Bahrain, etc. Furthermore, MOUs with Spain, South Africa, Syria, Ecuador, Ukraine, Botswana and Azerbaijan are in pipeline.
- VI. Ministry of OP&HRD is taking measures for maximum export of Pakistani manpower to other countries especially Malaysia. The Secretary, Ministry of OP&HRD paid visit to Malaysia in order to capture its market & work on removing the hurdles for the implementation of previous MOU.

Recommendations

- I. National Migration Policy should be formulated in order to have clear guidelines and strategy for minimizing the complaints of Pakistani migrant workers through upgrading the complaint mechanism system.
- II. The number of PE offices needs to be increased especially in interior Sindh and Balochistan. Moreover, more Migrant Resource Centers should be established in all major cities of Pakistan to redress the complaints.
- III. It is also recommended that new Orientation and Briefing Centers may be established initially at Division level and later on extended the Centers at district level for imparting proper briefing to intending emigrants. These Centres may be established with collaboration of recently created MRC under ILO and may be linked with main database through I.T Directorate of BE&OE.
- IV. At present, more than 96 % of the emigrants are working in GCC countries and there is a dire need to understand the changing trends in these countries to meet the manpower demand in future. Gulf countries are revamping their economies after fall of oil prices and introducing various initiatives especially in services sector. It will increase the demand of skilled workforce and more focus should be on skill development of workers. At this time, GOP should formulate plans and policies according to the new laws and trends. However, it is a pressing need of the hour to explore the job markets of other nontraditional manpower import countries including Turkey, Quartet countries etc.
- V. Familiarity with domestic conditions, discipline, teamwork, and a work-oriented approach instilled in the prospective emigrants will also help. Similarly, Pakistani professionals, such as doctors, engineers, managers, IT experts and construction supervisors, are of considerable quality, and are qualified to help strengthen the development base of the host countries. They, however, need to observe international standards and the respective country's social and legal framework, which at times some fail to do so and suffer as a consequence. In this connection, a well-established and updated system of Pre Departure Orientation should be operational to educate the emigrants. However, a regional module is prepared for pre departure orientation and post arrival orientation under platform of Abu Dhabi Dialogue. This module is quite comprehensive and needs to be implemented in the local context in its true letter and spirit.

- VI. As GCC governments are shifting their economies from traditional to knowledge based economies. Saudi Vision 2030 is one such example. So in coming years, further decline can also be observed because the demand of unskilled labor force will be limited. Skill based certified labor force will fulfill the demand of overseas employment.
- VII. The upcoming international events like Expo 2020 (Dubai) and FIFA World cup 2022 (Qatar) will create huge job opportunities both for skilled and semi-skilled workers. In order to meet such demands, it is important for all stakeholders especially OEPs to play their active role and prepare the manpower in marketable skills.
- VIII. Category wise analysis of the data clearly indicates the decline in traditional unskilled labor categories. On the other hand the categories like managers, doctors, cooks, surveyors and draftsman were increased. Future manpower export policies should be formulated according to the changing trends.
- IX. More focus should be on upskilling/skills matching and certification of workers to fulfill the demands of foreign employers. It is imperative to train professionals like educationists, doctors, engineers and scientists to compete the foreign employment markets.
- X. The collaboration of POEPA with training institutes like NAVTEC, TEVTA, Skill Development Council and 4 institutes accredited by UAE can be helpful to design and impart the market based training to the workforce.
- XI. Awareness campaigns should be launched with the collaboration of media to educate the general masses about the changing trends in labour market and future demands of employers.
- XII. At present, the share of women migrants is very low. There is a need to take proactive steps to increase women's participation in overseas employment.
- XIII. Pakistan can obtain significant share from GCC markets. It can be done by matching the required job demands with suitable persons who are to be trained and groomed specifically for the identified market.
- XIV. Skilled manpower is a field in which Pakistan should have developed an edge by now. Our technical institutes and universities turn out skilled persons by the thousands annually, and Pakistan should concentrate on these workers, enhancing their academic

skills by teaching them value-added features. They should focus on knowing the basic languages like Arabic and English.

- XV. The cost of migration for Pakistani workers is very high as compared to the other regional countries. Global Forum on Migration and Development published a research paper in which it ranks Pakistan on top in terms of cost for going abroad especially to Saudi Arabia. It is an important issue facing by Pakistani workers and it needs to be addressed on priority basis.
- XVI. Pakistan has signed numerous MOU's with different countries in the field of labour and manpower. In this regard, Foreign Office and Community Welfare Attaches' should play a proactive role for proper implementation of these MOU's.
- XVII. It is the need of time to explore new market avenues in order to jolt more manpower in them. The CWAs and OEPs may take up the matter on top priority and try their level best to search and opt more manpower demands from non-traditional manpower importing countries.