



2019

(JANUARY-JUNE)

MID YEAR ANALYSIS OF MANPOWER EXPORT

Prepared by:

M. Muzzammil Basraa
Research Officer

**BUREAU OF EMIGRATION &
OVERSEAS EMPLOYMENT**

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Contents

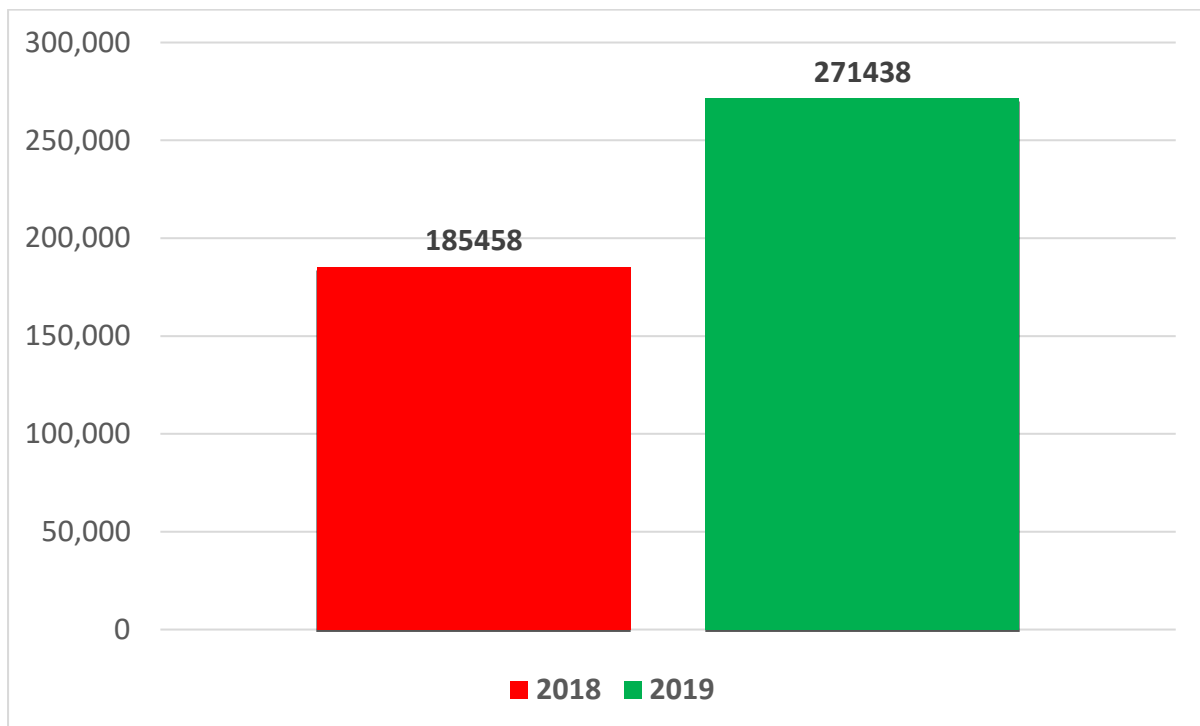
1. Introduction:	1
2. Emigration Trend of 2018 & 2019(Jan-June).....	2
3. Country Wise Comparison of 2018 & 2019	3
4. Month Wise Pattern of Manpower Export 2018&2019	4
5. Protector Wise Comparison 2018 & 19	4
6. Province/Region Wise Comparison 2018& 2019.....	5
7. Skill wise export of manpower during 2018 & 2019	6
8. Most in demand categories in 2019.....	7
9. Mode of Employment during 2018-2019	8
10. Top 10 Districts during 2018 & 2019	9
11. Regional Comparison 2019 (Jan-June)	10
12. Comparative Regional Analysis of 2018 &19 (Jan-June)	10

1. Introduction:

In the entire emigration history of Pakistan, the year 2015 witnessed the highest numbers when 946,571 Pakistanis were registered by BE&OE for overseas employment. Year 2016 was the second highest year when 839,353 emigrants were registered for employment abroad, though there was a 11.3% decline as compared to year 2015. Later on major decline in export of manpower was seen during years 2017 and 2018 when 496,286 and 382,439 Pakistanis were registered for overseas employment, respectively. Major reason behind this downward trend was low oil prices which caused slowdown of major manpower recipient countries i.e. Gulf economies who are reliant on oil sector income mainly. Moreover, increase in oil prices in year 2019 positively affected the gulf economies which opened up employment opportunities for expatriate workers and resultantly an increasing trend in export of manpower was witnessed during first half of 2019.

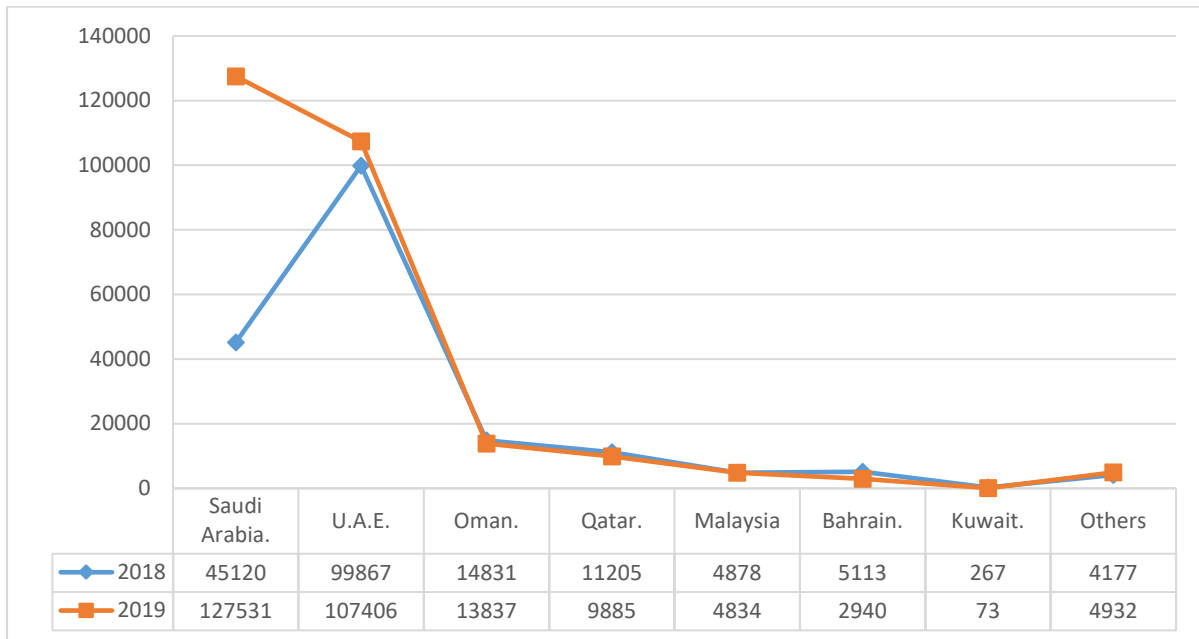
Apart from that, present government revived its diplomatic relations with Gulf States which helped out to restore the confidence of foreign employers on Pakistani workforce. The frequent visits of Prime Minister of Pakistan to GCC countries also showed positive results in which he urged upon the leadership of the GCC states to extend favourable facilities to Pakistani workforce. The diplomatic efforts coupled with stabilisation of oil prices created more employment opportunities for Pakistani workforce mainly in KSA and UAE, the largest destination countries for Pakistani workers. During the first half of 2019, an increase of 46% has been witnessed as compared the same period of previous year. The increase in export of manpower is a positive sign for Pakistan economy which is mainly relying on worker's remittances. The increase in export of manpower positively contributed towards growth in remittances when Pakistan received \$ 21.84 billion during FY 2019 which surpassed the set target of \$ 21.2 billion. Apart from GCC, Pakistan received major chunk of remittances from European countries such as UK and USA where improved economic conditions and higher job opportunities positively contributed to remittances growth. Moreover, data of State Bank of Pakistan indicates that Pakistan received 60 to 65% remittances from the Gulf and the Middle East countries.

2. Emigration Trend of 2018 & 2019(Jan-June)



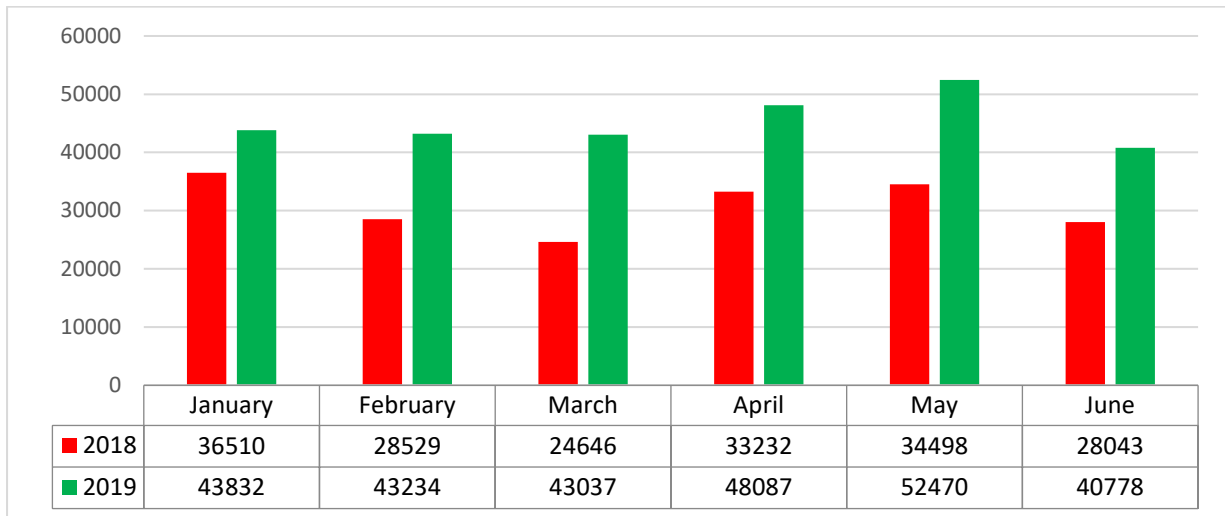
During first six months of 2019, 271,438 Pakistanis were registered by BE&OE for overseas employment as compared to 185,458 emigrants during the same period of 2018 showing an increase of 46.36 %. Pakistan has been facing a declining trend in export of manpower since 2016 onwards. The ongoing positive trend in export of manpower is a healthy sign for Pakistan's economy which is in shambles due to high debt financing, trade imbalance, current and budget account deficits etc. The growth of overseas employment will contribute to increase in remittances, reduce the burden of unemployment and poverty reduction as well. The economy of Pakistan is very much dependent on worker's remittances which has shown a considerable growth in recent times. The present government is cognizant to this fact and has taken various steps to facilitate the Pakistani emigrants during entire emigration cycle. Bureau of Emigration and Overseas Employment (BE&OE) has taken various initiatives to streamline emigration governance process in order to promote safe, orderly and regular emigration.

3. Country Wise Comparison of 2018 & 2019



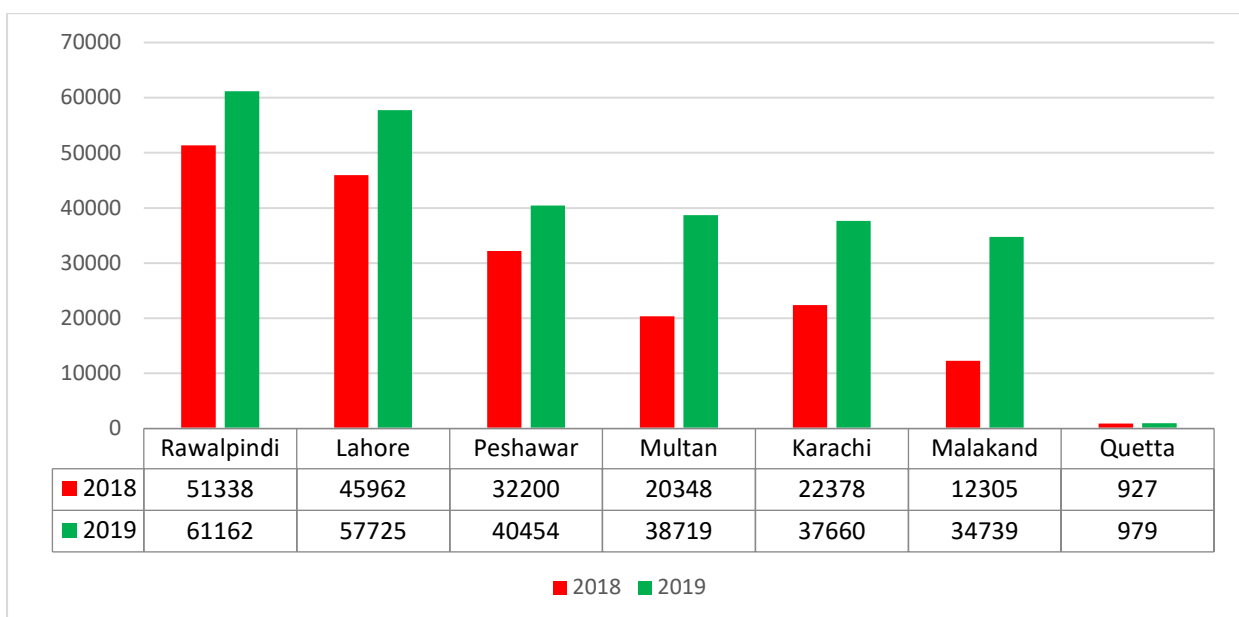
The above graph indicates that major increase in export of manpower has been witnessed in KSA where 127531 Pakistani workers registered for employment during first six months of 2019 as compared to 45120 in year 2018 showing a tremendous increase of 182%. In UAE, increasing trend can also be seen where 107406 Pakistani emigrants registered in 2019 against 99867 during the same period of 2018 showing an increase of 7.55 %. In rest of the countries, trend is almost similar during both the years except declining pattern in Bahrain and Kuwait. The above trend indicates that emigration pattern towards KSA and UAE is increasing while more efforts are required in other countries especially in Kuwait, Bahrain and Qatar to get more employment opportunities for Pakistani workers. During year 2018 more than 80% increase was observed in Qatar as compared to 2017 but the data of first six months of 2019 has shown a decline of 11%. Though Qatar has established Visa Facilitation Centres in Pakistan to complete the codal formalities within Pakistan and diplomatic efforts are also underway to capture maximum benefit of Qatar labour market in the context of upcoming FIFA world cup 2022, however more concrete steps needs to be taken.

4. Month Wise Pattern of Manpower Export 2018&2019



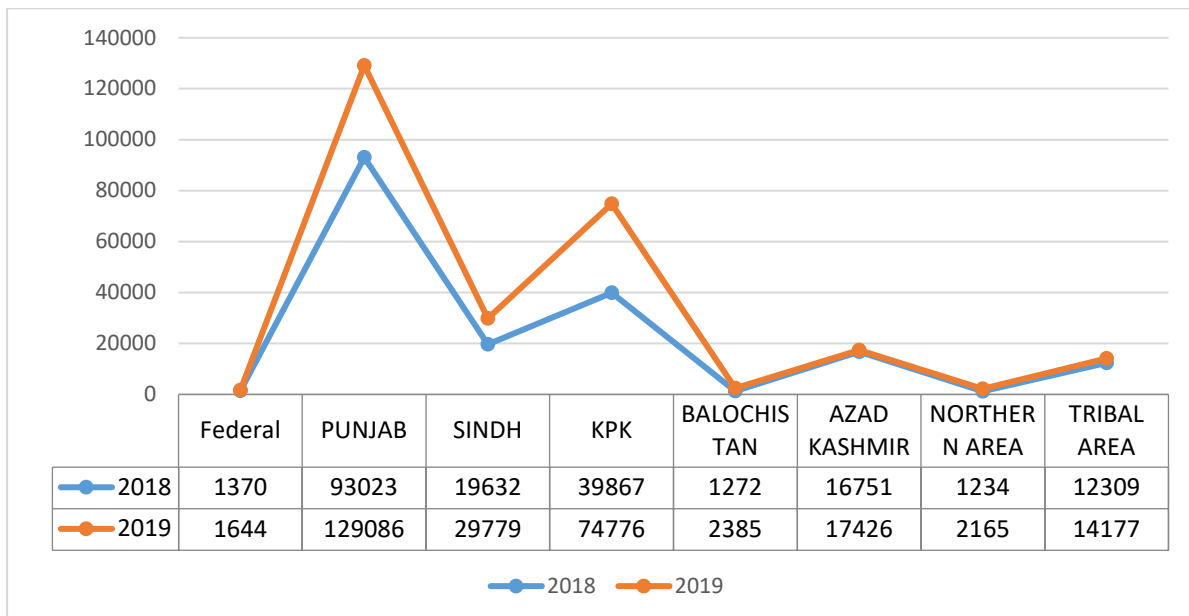
The above graph indicates the month wise pattern of export of manpower 2019 in comparison to the same month of 2018. During 2018 (Jan-June) majority of the migrants registered for overseas employment during the month of January, however, increasing trend is observed during the month of May 2019 when 52,470 emigrants registered for employment abroad. The graph further indicates that the average flow of outgoing emigrants during first quarter of 2019 was above 43,000 mark that is very much encouraging when compare to the same months of previous year.

5. Protector Wise Comparison 2018 & 19



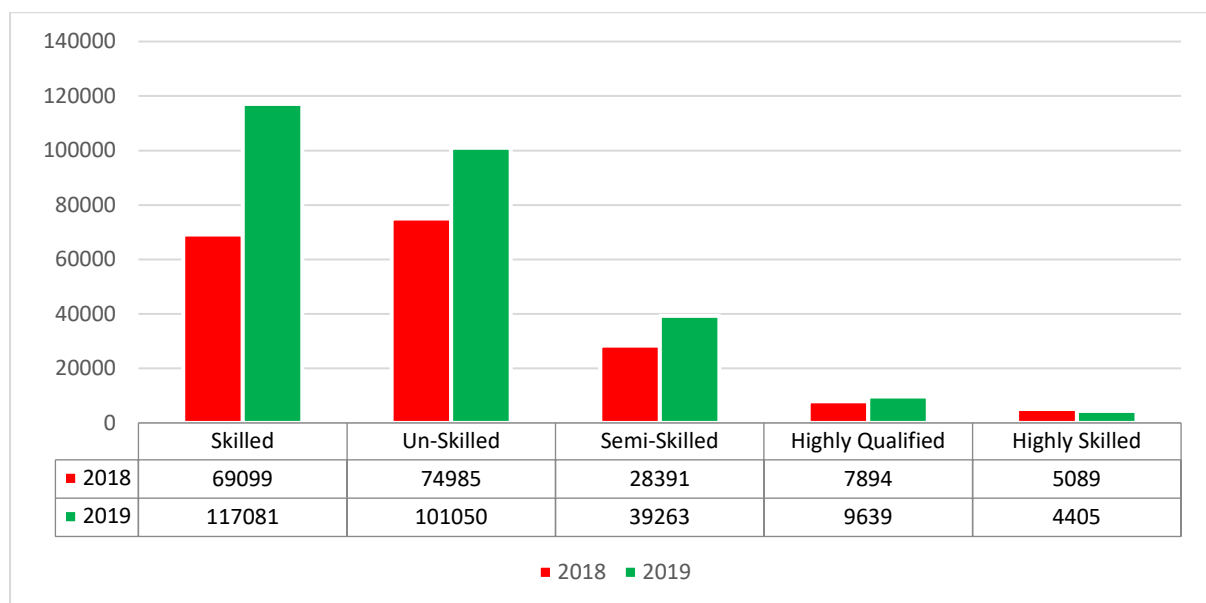
Protectorate wise trend in terms of number/rank is similar in both the years as evident in above graph. Protectorate of Emigrant Rawalpindi is on the top where 61162 emigrants were registered in 2019 which shows an increase of 9824 (19%) followed by Lahore (25.59%), Peshawar (25.63%), Multan (90.28%), Karachi (68.29%), Malakand (182.32%) and Quetta (5.61%). The major increase has been witnessed in PE Malakand, Multan and Karachi during 2019. It is pertinent to mention that all emigrants at PE offices are being registered through Biometric Verification System linked with NADRA. The manual registration/processing is no more in practice and presence of every emigrant is being ensured through biometric system. Moreover, One Window fee collection desks/counters have also been established in coordination with National Bank of Pakistan at all PE offices in order to facilitate the intending emigrants regarding fee deposit on a single deposit slip which was previously being deposited on different slips and in different Banks. Furthermore, one window facilitation desks at the PE offices would also be used for opening of bank accounts of emigrants and issuance of 2X ATM cards at the spot for the emigrant and his family to facilitate in remittance and providing incentives to remitter. BE&OE is coordinating with SBP/NBP in this regard as per directions of Prime Minister of Pakistan.

6. Province/Region Wise Comparison 2018& 2019



The above graph shows province/regional pattern of emigration in years 2018 and 2019. During 2019, majority of the emigrants proceeded abroad were from Punjab followed by KP, Sindh, AJK, Tribal areas, Baluchistan, Northern areas and Federal capital. The major increase during 2019 in terms of numbers is observed in Punjab (36,063) followed by KP (34,909) and Sind (10,147). It is pertinent to mention that a healthy increase (87.50%) in manpower export is witnessed from people of Balochistan which is a positive sign as previously people belonging to Balochistan were less inclined towards overseas employment. Moreover, a significant increase of 87% is also seen in KP as well which indicates that people of KP are more inclined towards overseas employment when comparing their emigration to population ratio.

7. Skill wise export of manpower during 2018 & 2019



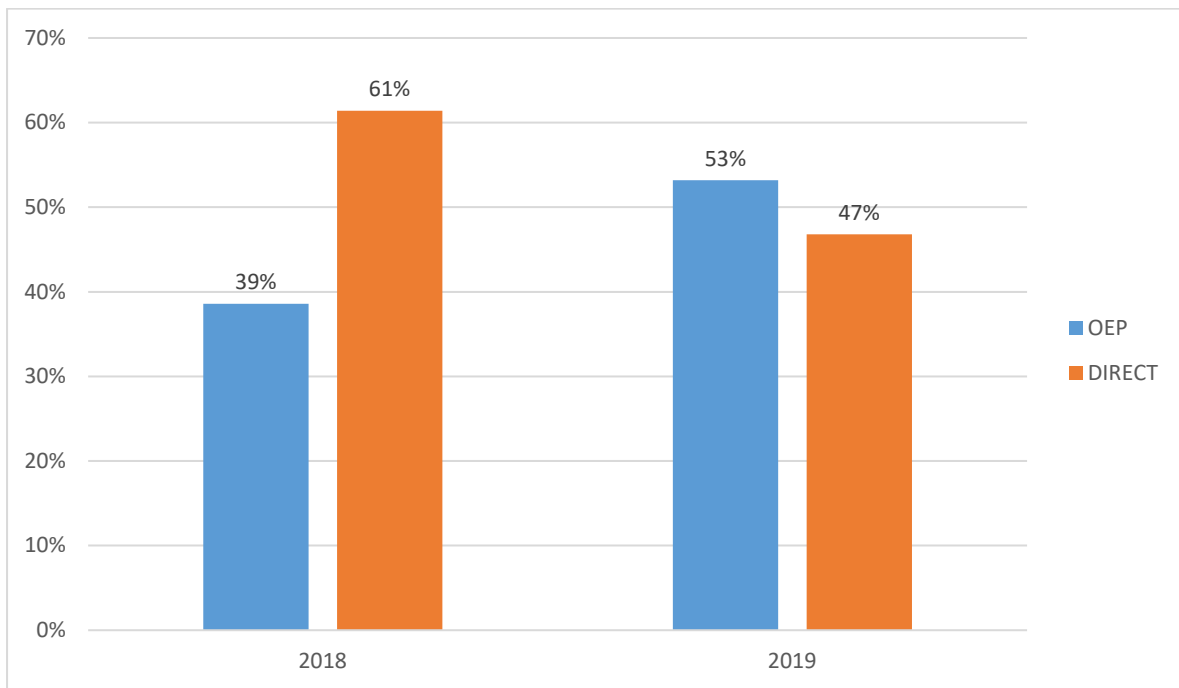
The above graph shows the comparative analysis of skill sets during first six months of 2018 & 2019. As it was projected in previous analysis reports of BE&OE that the demand of skilled persons will increase in future which is clearly **evident from the** above graph where 69.44% increase is witnessed in skilled job categories. Similarly, increasing trend is being witnessed in semi-skilled and highly qualified job categories where 38.29% and 22.11% increase is seen respectively. On the other hand, 34.76 % increase is also seen in unskilled categories as well which is also a positive sign for unskilled labour.

8. Most in demand categories in 2019

Sr.	Category	2018	2019	Difference	% Increase
1	Driver	20719	55058	34339	165.74
2	Labourers	70947	97171	26224	36.96
3	Mason	8387	11040	2653	31.63
4	Steel Fixer	3903	6466	2563	65.67
5	Electrician	6447	9009	2562	39.74
6	Technician	6350	8744	2394	37.70
7	Carpenter	6036	8188	2152	35.65
8	Plumber	3502	5613	2111	60.28
9	Engineer	2181	3612	1431	65.61
10	Foreman/ Supervisor	3050	4459	1409	46.20

The above table shows the most in demand job categories during first six months of 2019 as compared to the same period of previous year. The major increase is being seen in driver category which is a positive sign because a declining trend had been seen in this category from last couple of years mainly in KSA. It was projected that driver category may face decline mainly in KSA since Saudi government has allowed women for driving. But increase in above mentioned categories indicates that construction sector is once again gaining momentum as almost all the above job categories are related to construction/infrastructure related projects. It can be inferred from above trend that construction sector is being revived due to recovery of oil prices in Gulf region and that is a very good sign for Pakistan perspective as majority of Pakistani workers proceed abroad in construction sector related activities.

9. Mode of Employment during 2018-2019



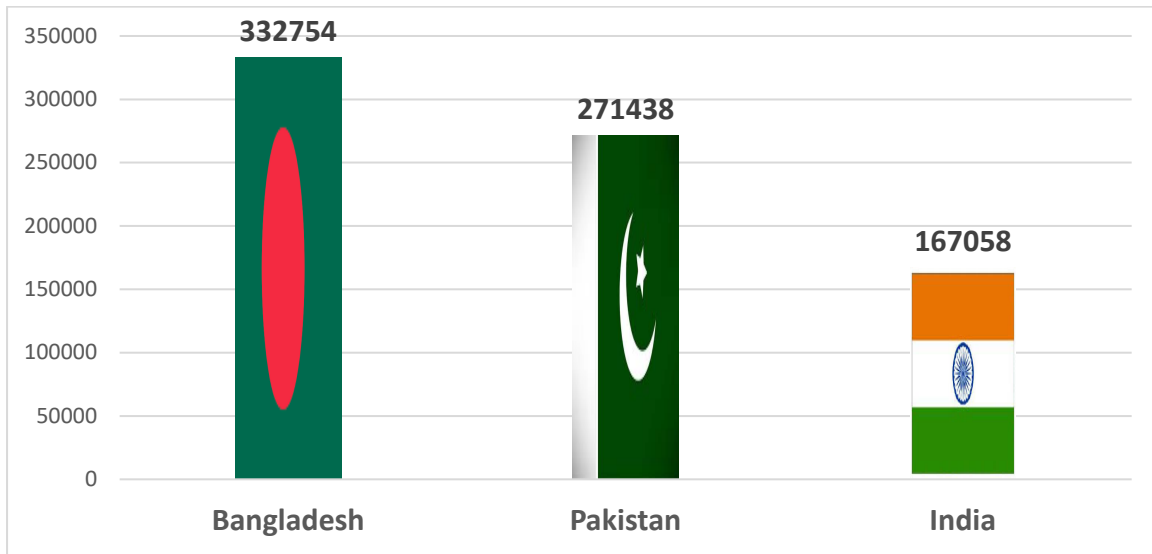
According to Emigration Ordinance 1979 and Emigration Rules 1979, an emigrant can proceed abroad for employment in two ways i.e. through registered overseas employment promoters (OEPs) and through direct method (through his/her own effort). In year 2018, majority of the emigrants were registered through Direct Employment. But during first six months of 2019 pattern of mode of employment changed and 53% of the emigrants were registered through OEPs which indicates that OEP activities/business got flourished which was facing downward trend since last two years. However, 47% of emigrants were registered through direct employment in the same period of time. The increase in manpower export has positive relationship with emigrant's registration through OEPs.

10. Top 10 Districts during 2018 & 2019

Sr.	2018		2019	
	District	No. of emigrants	District	No. of emigrants
1	Sialkot	7,957	Lower Dir	11,039
2	Gujranwala	6,418	Swat	9,346
3	Lahore	6,000	Sialkot	8,411
4	Faisalabad	4,891	Gujranwala	7,493
5	Swat	4,469	Dera Ghazi Khan	6,657
6	Attock	3,904	Lahore	6,415
7	Dera Ghazi Khan	3,868	Upper Dir	5,609
8	Gujrat	3,817	Multan	5,395
9	Karachi (Central)	3,813	Faisalabad	5,328
10	Rawalpindi	3,437	Rahim Yar Khan	5,127

The above table shows the top 10 districts of first six months during 2018 and 2019 in terms of export of manpower. During 2018, top districts were Sialkot, Gujranwala, Lahore, Faisalabad and Swat etc. but in 2019, position of districts changed. In first six months Lower Dir and Swat grabbed the first position in place of Sialkot and Gujranwala. It further indicates that emigration from KP is gaining momentum. However, presence of Gujranwala and Sialkot in top five position also indicates the high flow of emigration pattern from central Punjab region.

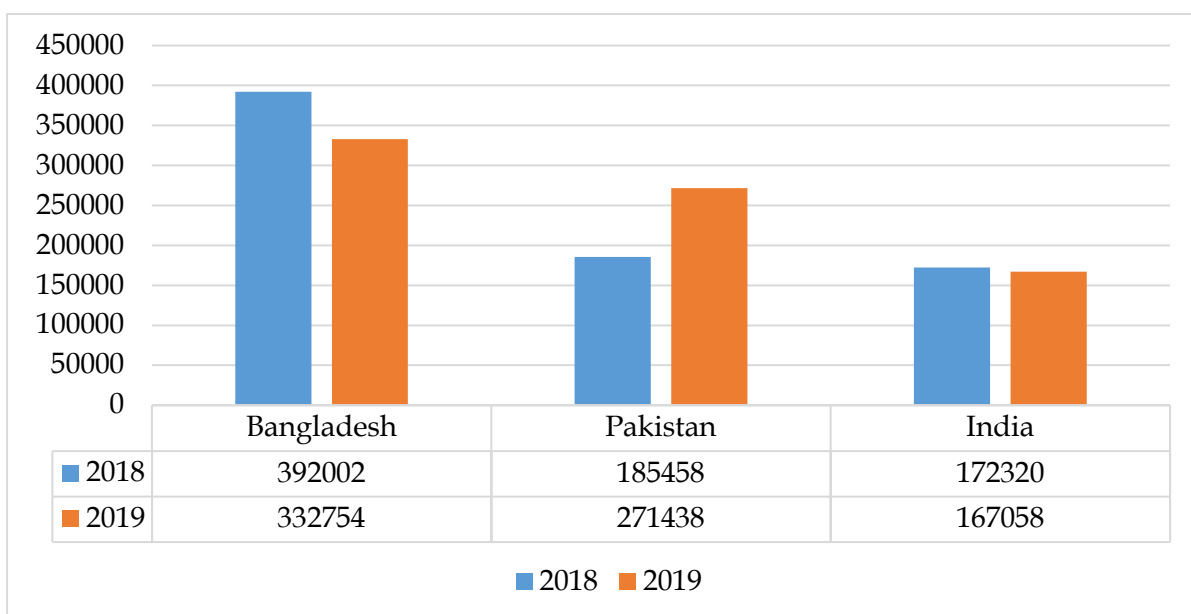
11.Regional Comparison 2019 (Jan-June)



Source: Bangladesh: www.bmet.gov.bd, Pakistan: www.beoe.gov.pk, India: www.emigrate.gov.in

The above graph shows the total export of manpower in 2019 (Jan-June) from Pakistan, Bangladesh and India. The overall trend is similar as it was in 2018 when Bangladesh was ahead from Pakistan and India in terms of manpower export. During first six months of 2019, a total of 332754 Bangladeshi emigrants proceeded abroad for overseas employment followed by Pakistan (271438) and India (167058).

12.Comparative Regional Analysis of 2018 &19 (Jan-June)



The above graph shows the comparison of manpower export of first six months of 2018 with 2019. From Bangladesh during 2019, 332,754 emigrants proceeded abroad for employment as compared to 392,002 emigrants during the same period of 2018 which shows the decline of 15%. From Pakistan, during 2019 a total of 271,438 emigrants were registered for overseas employment as compared to 185,458 emigrants during the first six months of 2018, which shows the increase of 46%. Moreover, from India 167,058 emigrants proceeded abroad during first six months of 2019 as compared to 173,320 emigrants in the same period of previous year which shows the decline of 3%. The emigration statistics of first six months of 2019 indicates that Pakistan manpower export is increasing as compared to its regional peers.