

# MANPOWER EXPORT: A STUDY OF CHALLENGES AND OPPORTUNITIES FOR PAKISTANI YOUTH

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## **ABSTRACT**

Manpower export has become a significant factor in the economy of Pakistan contributing remittances of around \$ 38 billion annually to Pakistan. This study deals with analyzing the present manpower export system in Pakistan with an objective to identify major trends and challenges. Specifically, this study seeks to document the existing manpower export trends, working models used by government and recruitment agencies, and the issues affecting the export of manpower from Pakistan. Along with analyzing these issues, this study aims to identify the new opportunities available in the international labor market for the youth.

At first step, data was obtained on manpower export from the BEOE to examine the growth pattern in manpower exports in terms of occupations, destination and level of skills. At second step, a questionnaire was designed to obtain responses from the recruitment agencies for highlighting issues and challenges in the manpower export system of Pakistan. At step three, this study critically examined the role of regulatory body and the skills testing system in Pakistan and their impacts on manpower exports from Pakistan. Lastly, we identified the emerging opportunities specially for skilled workers in the global labor market to enhance the manpower exports. Our findings suggest that manpower export system in Pakistan is facing several administrative and operational barriers along with putting higher costs burden on workers. This study recommended a set of regulatory and operational reforms to enhance the manpower exports from Pakistan.

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## INTRODUCTION & BACKGROUND

The export of manpower from the high population countries has been a traditional economic phenomenon as surplus labor is available for export to other countries. The demographic reality of Pakistan presents a strong case of manpower exports as total population of Pakistan has reached around 250 million in 2023 with average annual growth rate of 1.9%. Within this population, the share of young workers aged less than 35 years is 60% which shows the presence of significant youth manpower in Pakistan. As Pakistan has weak industrial base, the bulk of these young workers are unemployed or are underemployed in agricultural sector. The absence of good working opportunities has forced significant number of Pakistanis to move abroad in search of employment and wages. At present, around 8 million registered Pakistani workers are employed in the Gulf Countries, Europe, America, Japan, South Korea, Malaysia and in other regions of the world. These workers are regularly sending significant amounts (remittances) to their families in Pakistan which has reached to \$38 billion dollars in 2024. In this way, the remittances have become the top contributor towards the foreign exchange in Pakistan along with the exports.

*Table 1. Remittances Received by Pakistan (US Dollars; Billion)*

<b>Year</b>	<b>Total Remittances</b>	<b>Saudi Arabia</b>	<b>UAE</b>	<b>UK</b>	<b>USA</b>	<b>Other GCC Countries</b>	<b>Other Regions</b>
<b>2019</b>	22.0	5.6	4.7	3.4	2.8	2.3	3.2
<b>2020</b>	29.4	7.7	6.1	3.9	2.9	2.5	4.3
<b>2021</b>	31.0	7.8	6.1	4.0	3.1	2.6	4.4
<b>2022</b>	27.3	7.0	5.9	4.1	3.2	2.4	4.7
<b>2023</b>	30.3	8.0	6.5	4.7	3.3	2.8	5.0
<b>2024</b>	38.3	9.3	7.8	5.9	3.7	4.8	6.8
<b>Total</b>	178.3	45.4	37.1	26.0	19.0	17.4	28.4

*Source: Author's compilation based on SBP (n.d.).*

Traditionally, the manpower export model followed in Pakistan is based on recruitment agencies model which are the private sector firms specialized in hiring of unskilled, semi-skilled and skilled labor on behalf of foreign firms. These recruitment agencies are regulated and licensed by the Govt. of Pakistan through Bureau of Emigration and Overseas Employment (BEOE). A significant majority of these recruitment agencies are engaged in hiring local workers for Gulf-based foreign employers mostly related to the construction sector. These recruitment agencies have established their offices in major cities of Pakistan and regularly advertise the foreign job positions for hiring the local labor on contract basis. Along with this, Overseas Employment Corporation, a government body, also hires local labor on government-to-government contracts basis for sending workers to the other countries. The export of manpower from Pakistan is a multi-dimension phenomenon, while it poses challenges in terms of loss of human capital, it also offers significant benefits through remittances and international engagement (Farooq & Ahmad, 2017). Appropriate strategic planning and targeted policy interventions can enhance the benefits and mitigate the risks associated with manpower export.

There are various issues being faced by the workers while going through the recruitment process of these recruitment agencies. A key issue is the high costs associated with getting a foreign job that includes significant payment to the agencies for preparing applications, medical tests, trade tests,

short-term training etc. Another problem is the lack of transparent labor contracts that ensures a safe and healthy working environment for the workers in foreign countries. Similarly, these recruitment agencies mostly focus on hiring construction and service sector workers for the Gulf countries with strict conditions of fixed salary and harsh work environment. A significant issue is the lack of certification and accreditation of Pakistan based diplomas and certificates for foreign jobs. Very few recruitment firms specialize in hiring skilled labor for European and American firms which require advanced skills and certification.

Along with the private sector, the Govt. sector, through Overseas Employment Corporation (OEC) is engaged in the export of manpower to foreign countries. The OEC deals with hiring local workers under Govt. to Govt. (GTG) labor contracts. Pakistan has mostly signed these contracts for labor supply to the South Korea, Kuwait, Japan and Malaysia. The OEC generally calls for applications for foreign jobs as per the agreement between the governments. It conducts preliminary interviews, provides language training, brief on work environment and ensures medical fitness of workers while performing recruitment services. However, there are very few opportunities available under the OEC platform as Pakistan lacks labor supply contracts under govt. to govt. mechanism with other countries. However, the existing manpower export model, whether in the form of recruitment agencies or Overseas Employment Corporation, requires a rethink in terms of making labor contracts fair & transparent, reducing foreign job access costs, ensuring labor rights in the labor contracts, certifying labor skills for global acceptance, adequate language training, documentary support etc.

Many countries have established dedicated web portals and other platforms for enabling their youth to access foreign jobs. These countries include Bangladesh, Philippines, India, Nepal, Egypt etc. who have updated their manpower export models in the light of the recommendations from the ILO, WB and other foreign agencies and are successfully providing manpower export services by following ethical labor practices. For example, India has developed Skill India Program to equip the workers with market-oriented skills required for foreign jobs. Bangladesh has developed Wage Earners' Welfare Fund for financially supporting the overseas workers. Philippines has introduced strong regulatory framework for Overseas Filipino Workers (OFW) to protect their rights and ensure safe working environment. Nepal has established Foreign Employment Information Management System to provide authentic and updated information on foreign jobs to the workers. The Swiss Agency for Development and Cooperation has developed the Safe Migration (SaMi) Project to provide training to the workers from the developing countries on legal aspects and safe work environment.

Along with addressing the problems of existing manpower export models, this study also seeks to highlight the opportunities available to the semi-skilled and skilled workers in Europe, Australia, Canada, USA and other emerging economies. With an aging population and lower birth rates, these countries require a significant number of healthcare workers for nursing homes, old homes, day care centers, retirement homes, hospitals etc. Similarly, the labor shortfall in technical categories related to the engineering, IT, construction sector, logistics, security services etc. require a large number of workers from the developing countries. This study seeks to explain the requirements of accessing these job opportunities for the youth and the need for arranging certification and language trainings for manpower export.

### **1.1. Research Problem**

This study is aimed at identifying the issues and challenges in the manpower export models being followed in private sector of Pakistan. Since manpower export contribute around \$35 billion in average annual remittances along with employing around 10 million Pakistanis in foreign jobs annually, the continuity and enhancement of these remittances have become a crucial aspect of the economy of Pakistan in the light of huge economic challenges. This study seeks to identify issues in the existing system of the manpower export and identify new opportunities in the global labour market for making them accessible to the local youth. In this way, the issue of unemployment of youth can be tackled and remittances can be enhanced by reforming and updating the manpower export system of Pakistan.

### **1.2. Research Scope**

This research study seeks to examine the manpower export trends, practices of recruitment agencies involved in manpower exports, the role of regulatory bodies and identifying opportunities for manpower exports from Pakistan. This study is aimed at highlighting the emerging issues and challenges in the manpower export ecosystem of Pakistan by examining the issue through multiple dimensions.

### **1.3. Research Objective**

To critically examine the issues, challenges and emerging opportunities in the manpower export system of Pakistan

To achieve this research objective, following research questions were developed;

1. What are the major trends & patterns in manpower exports from Pakistan?
2. What are the major issues & challenges in the manpower exports from Pakistan?
3. What opportunities exist in the new destinations for manpower exports specially for youth?

The main objective of this study is to examine the manpower export models adopted by the recruitment firms and govt bodies to understand the issues and challenges in the manpower export system of Pakistan. Since a vast majority of youth in Pakistan is unskilled or semi-skilled who lack information on improving their skills and obtaining necessary labor certification for accessing the foreign jobs. Along with this, skilled labor is also facing huge challenges in accessing foreign jobs due to the lengthy processes, lack of globally recognized certification, non-familiarity with foreign languages, dependence on recruitment firms etc. This situation requires a rethink of our traditional manpower export models and the designing of a new responsive, globally connected, fair and accessible manpower export model.

*Table 2. Illustration of Steps Involved in Manpower Exports*

Step 1	<p><b>Overseas Job Demand Generation (Foreign Employer Side)</b> Demand is communicated to Pakistani OEPs through:</p> <ul style="list-style-type: none"> <li>• <b>Direct employer contact</b></li> <li>• <b>Recruitment agents</b></li> <li>• <b>Via agents based in Gulf countries</b></li> </ul>
Step 2	<p><b>Job Order Approval &amp; Registration in Pakistan:</b> OEP submits job demand documents to Bureau of Emigration &amp; Overseas Employment (BEOE) for allotting a job number.</p>
Step 3	<p><b>Worker Mobilization &amp; Recruitment</b> OEPs advertise vacancies through:</p> <ul style="list-style-type: none"> <li>• Personal networks</li> <li>• Informal agents (sub-agents)</li> <li>• Newspapers and social media</li> <li>• Interested workers register with OEPs</li> </ul>
Step 4	<p><b>Worker Screening &amp; Trade Testing</b></p> <ul style="list-style-type: none"> <li>• Initial screening by OEPs</li> <li>• Trade tests conducted by; <ul style="list-style-type: none"> <li>✓ OEP-arranged testers</li> <li>✓ Training institutes</li> <li>✓ Foreign employer representatives</li> </ul> </li> </ul>
Step 5	<p><b>Medical Examination</b></p> <ul style="list-style-type: none"> <li>• Worker undergoes medical tests at GAMCA-approved clinics</li> <li>• Fitness is mandatory for visa issuance</li> </ul>
Step 6	<p><b>Visa Processing &amp; Fee Payment</b></p> <ul style="list-style-type: none"> <li>• Employer issues work visa</li> <li>• Worker pays the fee for visa, travel, OEP fee etc.</li> <li>• Documents submitted to BEOE for the Protector of Emigrants clearance</li> </ul>
Step 7	<p><b>Pre-Departure Orientation &amp; Registration</b></p> <ul style="list-style-type: none"> <li>• Mandatory briefing by the regional Protector of Emigrants</li> <li>• Registration and biometric verification at the Protector</li> <li>• Insurance enrolment &amp; payment of fee</li> </ul>
Step 8	<p><b>Travel &amp; Arrival Abroad</b></p> <ul style="list-style-type: none"> <li>• Worker travels to destination country</li> <li>• Employer or local agent receives worker</li> </ul>
Step 10	<p><b>Remittances, Renewal, or Return</b></p> <ul style="list-style-type: none"> <li>• Regular remittances of salary received at workplace</li> <li>• Contract renewal and extension in stay</li> <li>• Return after contract completion</li> </ul>

*Source: Author's compilations.*

## LITERATURE REVIEW

The export of manpower is described by various researchers in different economic, sociological, and migration theories to explain the motivations and consequences of labor migration from developing to developed countries. The Push-Pull Theory proposed by Lee (1966) stated migration trends in terms of the market forces that "push" people out of their home country and those that "pull" them toward the host country. Generally, push factors include unemployment, political instability, inflation and poverty while pull factors include higher wages, better living standards, decent work and better job opportunities in the receiving country. Another theory is the Neoclassical Economic Theory contributed by Harris & Todaro (1970) which stated that labor migration is driven by wage differentials between countries. Generally, workers migrate in search of economic opportunities from countries where wages are low to countries where wages are higher. In response to this, The New Economics of Labor Migration theory proposed by Stark & Bloom (1985) stated that migration decisions are often made by families as a strategy to diversify income sources and reduce financial risk. Unlike neoclassical theory, this theory focuses on the role of remittances and the collective financial benefits that migration brings to families in the home country. A very useful theory contributed by Wallerstein (1974) is the World Systems Theory that explained migration as a consequence of global capitalism and economic inequality. It stated that migration flows are influenced by the expansion of capital from developed countries to peripheral developing countries. Similarly, Migration Networks Theory of Massey et al. (1993) emphasized the role of social networks in migration. This theory claimed that once migrants financially establish themselves in a host country, they create a network of job-related information that facilitate their friends and relatives to join them in that country.

Besides explaining motives for manpower export, several studies have tried to document the different other aspects of the manpower export. For example, Amjad (2010) studied the impact of remittances on poverty reduction and reported that remittances contribute positively towards household economic development. This study recommended that, with trained manpower, more remittances can be sent back to the country of origin that help to accelerate the economic development. A study by Farooq (2019) studied the youth segment and recommended that this demographic dividend can be turned into an asset capable of generating cash inflows for Pakistan. The study stressed the need for exporting surplus labor from Pakistan to reduce the unemployment rate in the country and adopting manpower export as a strategy to increase the remittances and foreign reserves.

According to Kamal (2015), Pakistan faces a rapidly growing workforce, with approximately 1.5 million new entrants each year. While this youth bulge could serve as a demographic dividend, the country's sluggish economic growth, political instability, corruption, and lack of investment hinder domestic job creation. As a result, many young Pakistanis face issues related to employment, leading to social and economic challenges and prompting them to seek better economic opportunities abroad. Farooq & Ahmad (2017) conducted a study on the large-scale migration of highly qualified and skilled Pakistani professionals to 27 countries during the period from 1981 to 2016. This migration is influenced by a combination of push factors, which refer to challenges in the home country, and pull factors, which relate to opportunities abroad. They identified several challenges in

Pakistan, including economic constraints, labor market pressure, demographic stress, and financial instability. On the other hand, the pull factors included higher wages, better living standards, career growth, social safety, and stable economic environments in destination countries.

In the aftermath of the mid 1970s oil boom, Pakistan has witnessed a substantial rise in the export of manpower, particularly to Gulf countries such as Saudi Arabia, Bahrain, Qatar, and the UAE. This outflow has significantly boosted remittances and contributed to Pakistan's foreign exchange earnings. The migration of largely young workers has delivered notable economic gains; however, it also presents challenges, including the loss of skilled labor and reduced domestic productivity. To fully leverage the benefits of manpower export, it is crucial to invest in youth skill development and establish mechanisms for the productive utilization of remittances (Tsakok, 1982). The Covid-19 affected the global economy, with manpower export being one of the most severely impacted sectors. South Asia, in particular, experienced a sharp decline in overseas employment and job losses for migrant workers. The pandemic disrupted manpower export by halting international travel, suspending work visas, and causing widespread layoffs. This led to a significant drop in remittances, which are crucial for economies that depend on overseas employment. Returning migrants also faced serious challenges in reintegrating into the local workforce and finding new job opportunities (Mannan et al., 2020)

Islam (2015) conducted a study in Bangladesh and documented that international migration of labor/ Manpower, is a significant economic strategy for many developing countries. Manpower export provides employment opportunities, alleviates poverty, and contributes substantially to national income through remittances. It helps reduce unemployment, increase remittance inflows, empower women, and improve skill development. However, manpower export also poses several challenges, including irregular migration, vulnerability and exploitation of workers, and the high cost of migration.

Focusing on issues with the manpower export models, ILO (2018) reported that the biggest issue in the manpower export model in developing countries specially Pakistan is the exploitative practices of the recruitment agencies. This report highlighted that these agencies charge abnormally high fees and use deceptive tactics to hire the workers with harsh conditions in the labor camps. The same argument was presented by Wickramasekara (2019) who stated that recruitment agencies exploit workers by charging higher fees and provide no legal protection in foreign labor camps particularly located in Gulf countries. A similar study by Kumar & Singh (2021) suggested that Pakistani workers are overly reliant on manpower export to the Gulf countries. Any change in labor regulations or policy (for example preference to the local labor or workers from another country) in Saudi Arab, UAE, Qatar, Bahrain, Kuwait and Oman may negatively affect the earnings workers. This study recommended a diversification in destination for manpower exports for countries like Pakistan as these countries are implementing labor nationalization and 'preference for local' policies.

A study by Rahman & Khatun (2018) examined the skills gap in workers and reported that a significant majority of labor from Pakistan and other developing countries is unable to access good quality jobs due to the absence or mismatch of skills. The authors recommended that technical training and labor certification is required to upgrade the workers' skills to access premium jobs

globally. A study by World Bank (2020) stated that developed countries require skilled labor in healthcare, IT, Engineering and logistics but labor from developing countries such as Pakistan is unable to access these job opportunities due to the skills mismatch or absence of globally recognized certifications. The World Bank suggested that governments in developing countries should focus on these emerging opportunities and may approach these countries for building government to government agreements for labor export.

To examine the impact of providing technical training for accessing foreign job opportunities, the National Vocational & Technical Training Commission (NAVTTTC) conducted a study in 2018 on the effectiveness of training programs. The findings of the study reported that skills development programs in the field of construction, healthcare, engineering, IT etc. significantly improve the chances for getting a good quality foreign job. A report by the International Labor Organization in 2020 suggested that ethical practices are required to be adopted in manpower export model to provide a fair and transparent chance for every deserving young person. This report cited the example of Philippines who had developed zero-recruitment fee model for labor export and had inked government to government level agreements with foreign firms to provide safe and healthy working environment for its workers (ILO, 2020). A very useful study by the Overseas Pakistanis Foundation (OPF) conducted in 2021 examined the barriers to access the foreign labor markets for Pakistani youth (OPF, 2021). This study reported that imparting language learning courses, conducting work-culture training and establishing govt. to govt. hiring procedures can help the youth to access the foreign labor markets.

A very useful study by Wanger & Aras (2022) reported the long-term positive relationship between remittances and the human development in Nigeria. They stated that the efficient management of remittances is required to support the families and communities of diaspora to enhance their social and economic conditions. A research study by Hasan et al. (2022) reported the long-term links between higher crude prices, GDP growth and the foreign employment in the case of Bangladesh. The authors recommended that policy makers should carefully examine the economic factors prevalent in the foreign labor markets before making decisions for manpower exports. A study by George (2023) examined the costs and benefits of manpower exports from India and recommended that the gains from manpower exports in the form of remittances and returnee's knowledge contribute significantly to the economic development of a nation. However, there is a need to upgrade the skills of workers without ethnic discrimination to maximize the gains associated with manpower exports. Khalid (2025) examined the reports and research studies related to the manpower reports from Pakistan and found that lack of skilled labor force, deficiency in meeting host country's requirements, insufficient post-recruitment support mechanism for foreign workers and gender imbalance in the manpower exports significantly affect the level of manpower exports from Pakistan.

Based on the literature cited above, this study seeks to make contribution in the body of knowledge by exploring the existing manpower export model with its major players; recruitments agencies, government bodies and individuals affected by these practices. This study aims to highlight the issues and challenges being faced by the youth in the present manpower export model. In addition to this, this study intends to explore the practices of the recruitment firms engaged in the manpower exports in order to evaluate their working models. Next, this study seeks to discuss the job opportunities

offered by European, American and other countries for skilled labor from the developed countries and how these jobs can be accessed by young persons from Pakistan.

## RESEARCH METHODOLOGY

This study used data from both secondary sources and primary sources. Overall, this study was conducted in four stages. In stage 1, we collected secondary data from the Bureau of Emigration and Overseas Employment (BEOE) on manpower export was collected. This data was analyzed to know the trends and patterns in manpower exports from Pakistan. At stage 2, we obtained the primary data through questionnaire from the OEPs for understanding the choices of manpower exports and the challenges present in the existing system. For this purpose, a sample of 40 Islamabad/Rawalpindi based OEPs was taken (out of 904), and the questionnaire was forwarded to them. From OEP, we obtained the data on the number of people sent abroad by each firm and stratified the sample into three categories.

*Table 3. Sample Selection Strategy for OEPs*

No.	OEP Category	Size/Volume	Sample
1	High	Sending more than 10,000 workers abroad annually	8
2	Medium	Sending 1,000 to 10,000 workers abroad annually	21
3	Small	Sending below 1,000 workers abroad annually	11
Total			40

*Source: Author's compilations.*

The data on high, medium and small volume OEPs were obtained from the BEOE. Based on the data provided, we selected the top OEPs from each category for data collection, leading to a sample size of 40. This data collection instrument was structured in two broader sections;

- i. Structured questionnaire for obtaining information
- ii. Open ended questions probing multiple themes

The objective of asking pre-defined structured questions was to enhance the information power and ensure consistency among the sampled OEPs. This questionnaire, which includes both closed and open-ended questions, has the following broader themes (identified through literature review and initial discussion with the OEP and the BEOE concerned people).

- iii. Theme 1: Firm Profile
- iv. Theme 2: Recruitment & Contracts
- v. Theme 3: Costs & Compliance
- vi. Theme 4: Challenges & Skills Match
- vii. Theme 5: Relationships & Irregular Channels
- viii. Theme 6: Recruitment Support
- ix. Theme 7: Foreign Employers Perspective
- x. Theme 8: Workers' Aspects

The questionnaire developed for collecting data from the OEPs is attached in the Annexure A. Along with these themes, we also aim to let any other theme emerge during the interviews to capture the maximum information and comprehensive points covering all areas. The Google Forms were used

for developing questionnaires which were shared with the relevant people in the OEPs. The data collected was analyzed using SPSS software for deriving key results and findings.

At stage 3, we examined the institutional perspectives dealing with the manpower exports from Pakistan. This includes a critical review of the BEOE and skills testing bodies such as NAVTCC. We made field visits to both BEOE and NAVTCC and had fruitful discussion with the concerned officials there. Since BEOE plays regulatory functions for the manpower export system, the review focused on the regulatory aspects of the manpower exports. The NAVTCC with its skills development and testing role plays a key part as manpower export facilitating body.

At stage 4, for identifying opportunities in the global markets, country specific skilled visa programs are analyzed, and areas/sectors are highlighted where labor shortfall exists in the developed countries. Along with this, the requirements of accessing these jobs are examined to understand the skills, certification and language requirements for these jobs

Through this four-stage design, this study aims to cover the manpower export system in Pakistan through multiple lens so that a comprehensive picture may be emerged leading towards developing action-oriented policy tools.

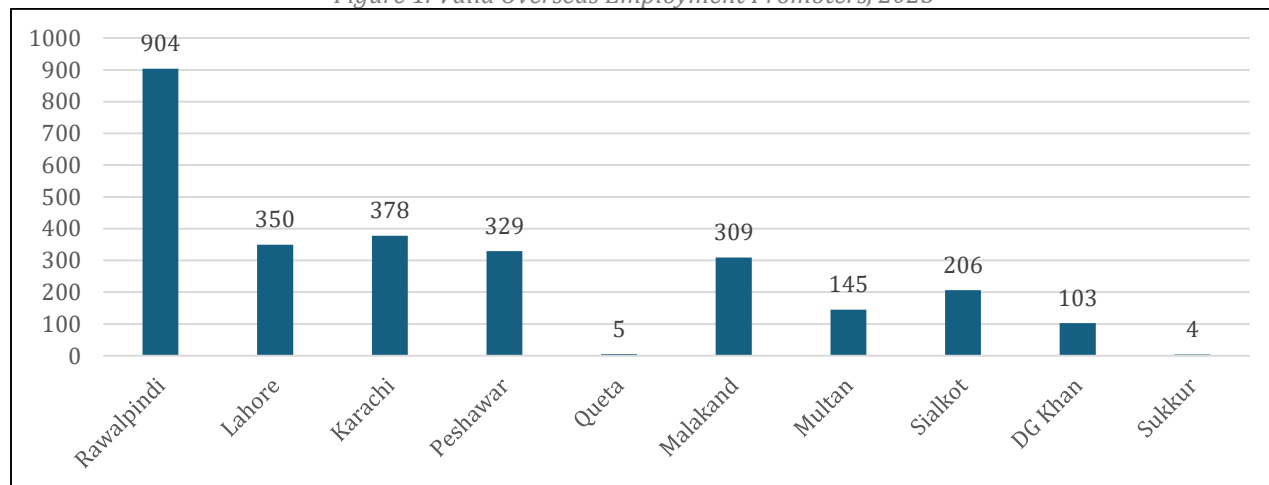
## FINDINGS: EXISTING STATE OF MANPOWER EXPORTS

This section provides an overview of the existing state of manpower exports from Pakistan. It includes the data on the number of foreign workers (segregated by occupation, destination, province and skill level). It also examines the year-wise trends in overseas employment and the number of OEPs registered with the BEOE. Along with this, it provides the year-wise trends in manpower exports from Pakistan through formal channels (i.e. registered BEOE & OEC.)

### 4.1. Bureau of Emigration & Overseas Employment

The Bureau of Emigration and Overseas Employment (BE&OE) is a federal agency that regulates the recruitment and migration of Pakistani manpower under the Emigration Ordinance 1979 and related rules. Its key functions include managing the emigration process, ensuring the welfare and facilitation of emigrants, conducting pre-departure orientations, and regulating the licenses of Overseas Employment Promoters (OEPs). BE&OE operates through nine regional offices (Protectorates) located in Karachi, Lahore, Rawalpindi, Peshawar, Multan, Malakand, Quetta, Sialkot, and Dera Ghazi Khan. According to Section 12 of the Emigration Ordinance, 1979, the Bureau of Emigration & Overseas Employment (BE&OE) issues licenses to private Overseas Employment Promoters (OEPs). At present, 2,733 valid OEPs are operating in Pakistan, and their details are available on the BE&OE website ([www.beoe.gov.pk](http://www.beoe.gov.pk)). The following figures show the number of valid OEPs working in different Protectorates.

Figure 1. Valid Overseas Employment Promoters, 2025



Source: Source: Author's compilation based on GOP (n.db.).

Figure 1 shows the protectorate-wise distribution of these OEPs. The Rawalpindi protectorate accounts for the largest share, highlighting its central role in workers migration. It is followed by Lahore and Karachi, which are also key hubs due to their large population and economic activity. Other protectorates such as Peshawar, Malakand, Multan, Quetta, Dera Ghazi Khan, and Sialkot have smaller but still significant numbers of licensed OEPs.

A detailed table presenting the manpower exports data from Pakistan across the years is presented here. These figures on manpower exports are aggregated category wise over the years.

Table 4. Category-wise Distribution of Manpower Export

Category	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Laborer	341,314	296,661	183,382	150,274	243,328	94,971	113,851	357,995	385,892	364,574	6,093,867
Driver	141,316	106,296	53,588	52,868	182,932	76,531	87,884	232,120	196,575	185,209	163,718
Mason	62,945	61,037	23,986	17,130	19,609	4,973	9,123	34,694	22,956	14,938	873,383
Carpenter	38,002	33,912	18,204	11,629	13,769	3,213	4,168	10,693	13,275	5,122	567,166
Technician	42,328	35,092	18,266	11,368	16,895	5,774	11,875	23,347	21,680	15,917	545,463
Electrician	34,653	29,448	17,194	12,076	15,167	4,811	7,103	20,322	18,036	10,895	458,313
Steel Fixer	27,609	22,743	11,490	7,069	9,291	1,269	1,225	6,271	5,280	2,793	370,963
Agriculturist	30,967	30,104	12,558	7,596	6,264	866	738	3,110	6,761	1,518	361,879
Mechanic	22,465	16,658	11,830	8,595	9,006	2,188	4,887	11,147	10,723	8,908	313,450
Painter	20,409	21,847	9,473	6,559	7,818	1,905	2,658	8,820	8,682	3,320	249,997

Source: Source: Author's compilation based on GOP (n.dc.).

Table 3 shows the top ten categories of emigrant workers. The majority of them are laborers, whose numbers peaked in 2015 and again in 2022–2023, reflecting high demand in Gulf countries for construction and other low-skilled work. Other categories such as drivers, masons, carpenters, and electricians also contributed steadily, though at a much smaller scale compared to laborers. After 2016, many categories, including masons, carpenters, and painters, experienced a sharp decline, likely due to technological changes in construction, stricter visa policies, and shifting labor market demands. The years 2020–2021 show a significant drop across almost all categories because of the COVID-19 pandemic and travel restrictions. Moreover, in 2022–2023, employment opportunities rebounded significantly, particularly for laborers and drivers, before declining again in 2024–2025.

Table 5. Country-wise Distribution of Manpower Export

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
KSA	522,750	462,598	143,363	100,910	332,764	136,376	155,777	514,909	426,951	452,562	530,256
UAE	326,986	295,647	275,436	208,635	211,270	53,676	27,442	128,477	229,894	64,130	52,664
Oman	47,788	45,085	42,362	27,202	28,404	10,348	38,350	82,380	60,046	81,587	9,375
Qatar	12,741	9,706	11,592	20,993	19,371	7,422	37,987	57,999	55,112	40,818	68,376
Bahrain	9,029	8,226	7,919	5,745	8,189	7,843	12,977	13,653	13,345	25,198	37,726
Kuwait	164	770	773	493	126	419	1,607	2,089	2,328	1,883	6,590
Malaysia	20,216	10,625	7,174	9,881	11,327	2,301	106	6,175	20,905	5,790	3,609
Iraq	709	543	599	756	2,306	1,177	2,819	2,387	4,307	6,650	6,128
Libya	8	-	4	8	17	13	86	206	58	67	148
Others	2,206	1,908	1,572	1,998	4,838	2,203	4,305	5,645	11,408	17,766	17,718

Source: Source: Author's compilation based on GOP (n.dc.).

The table 4 shows the top ten countries that received the highest number of Pakistani migrant workers from 2015 to 2025, according to the Bureau of Emigration and Overseas Employment (BE&OE). Over this period, many Pakistanis officially migrated for work, with Saudi Arabia (KSA) being the primary destination. The United Arab Emirates (UAE) ranked second in terms of receiving Pakistani migrant workers. Other Gulf Cooperation Council (GCC) countries, such as Oman, Qatar, Bahrain, and Kuwait, have also attracted a considerable number of Pakistani workers. While the exact figures vary year by year, these countries have continued to offer employment opportunities, particularly in the construction and service sectors. Beyond the Gulf region, Malaysia and Iraq have emerged as notable destinations in specific years when migration spikes were observed. Despite the

challenges posed by the COVID-19 pandemic in 2020, migration from Pakistan did not stop entirely. The "Others" category represents Pakistani migration to countries outside the main listed destinations, showing a broader global footprint. Overall, the data highlights Pakistan's significant contribution to the global labor force, particularly in the Middle East and parts of Asia.

*Table 6. District-wise Distribution of Manpower Export*

<b>District</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Sialkot	30,529	28,433	27,943	33,891	36,016	23,036	15,776	25,068	10,579	14,743	29,160
Karachi	28,392	30,247	54,857	64,490	11,032	8,708	7,700	7,044	1,863	2,594	17,967
Lahore	23,709	24,614	26,048	30,169	26,237	17,301	11,861	15,695	6,312	8,083	24,940
Rawalpindi	15,615	14,405	18,322	22,328	17,679	9,339	6,062	13,395	6,215	9,309	25,743
Gujranwala	27,703	25,811	24,826	32,655	31,464	17,857	12,577	19,974	8,005	10,449	28,049
Lower Dir	25,882	15,400	14,853	26,760	25,158	8,800	7,888	25,384	8,385	8,388	23,897
Swat	23,941	15,141	16,289	28,485	25,389	11,074	9,920	25,587	9,913	11,175	29,403
Gujrat	18,803	15,327	16,251	19,349	13,479	10,057	7,215	12,800	5,159	6,665	16,883
Faisalabad	21,349	21,810	23,727	31,622	27,213	14,443	9,161	15,282	6,366	8,159	23,327
DG Khan	19,471	17,987	19,362	31,744	24,914	9,566	8,785	21,578	8,602	13,407	17,773

*Source: Source: Author's compilation based on GOP (n.d.).*

The table 5 highlights the top ten districts of Pakistan that sent the highest number of migrant workers abroad between 2015 and 2025. Sialkot stands out as a leading district, showing strong growth in 2015–2016 and again in 2025, when manpower exports peaked. Karachi had a strong base in 1971–2010 but later showed fluctuations, with a sharp rise in 2017–2018 followed by a steep decline after 2019. Lahore and Rawalpindi maintained steady contributions, with notable spikes in 2015–2017 and renewed growth in 2025. Gujranwala, Lower Dir, and Swat recorded significant increases after 2014, reflecting rising demand for semi-skilled and unskilled workers, with Swat reaching a strong peak in 2025. Gujrat and Faisalabad showed moderate but steady outflows, peaking around 2016–2018, while DG Khan displayed a remarkable upward trend with sharp increases in 2016–2018 and another peak in 2025.

Traditionally, Karachi, Lahore, Rawalpindi, and Gujrat were among the early leaders in manpower exports, maintaining strong bases. Karachi, in particular, dominated the early decades due to its large urban workforce and easier access to international job markets. Lahore and Rawalpindi consistently provided steady contributions, while Gujrat established itself as an important hub for migrant workers, especially in the Middle East. In contrast, the recent trend shows a clear shift of dominance towards emerging districts. Sialkot has risen as a frontrunner due to its industrial base and strong overseas demand for labor, peaking again in 2025. Lower Dir and Swat, which were once smaller contributors, have grown quickly since 2015, with Swat reaching its highest level in 2025.

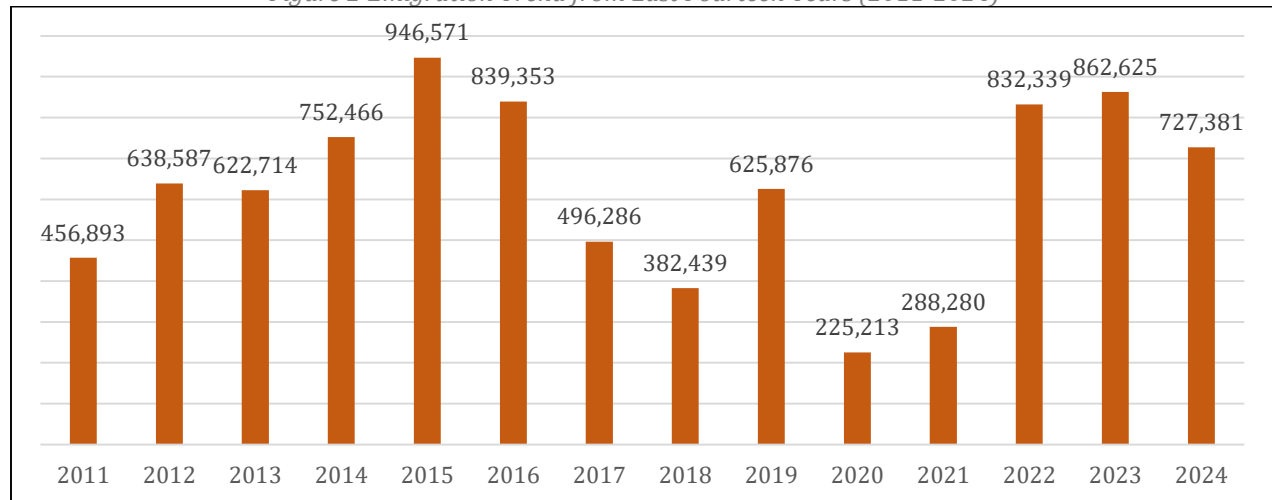
Table 7. Occupation-wise Distribution of Manpower Export

Occupation	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Highly Qualified	17,484	16,510	16,029	16,105	15,525	5,121	7,396	17,976	22,760	19,587	18,352
Highly Skilled	7,853	8,172	9,886	9,770	9,899	3,745	6,563	20,865	45,687	29,434	13,657
Skilled	397,317	335,671	188,745	142,486	285,960	103,226	131,348	347,733	314,932	255,706	222,171
Semi-Skilled	151,636	152,235	85,686	56,208	64,900	17,284	28,384	84,660	86,593	56,562	42,257
Un-Skilled	372,281	326,765	195,940	157,870	249,592	95,837	114,589	361,105	392,653	366,092	446,062

Source: Source: Author's compilation based on GOP (n.d.).

The table 6 shows the skill-wise distribution of emigrant workers from Pakistan between 2015 and 2025. The data reveals that Pakistan's overseas workforce has been dominated by skilled and unskilled workers, who together make up the majority of manpower exports. Unskilled workers consistently form the largest share, peaking in 2015 and again in 2022–2023, mainly due to high demand in construction and general labor sectors, particularly in Gulf countries. Skilled workers also contribute significantly, with peaks in 2015 and a strong rebound in 2022, though their numbers start to decline by 2024–2025. Semi-skilled workers show moderate but fluctuating contributions, rising in 2016 and again in 2022–2023, before dropping in 2024–2025. In contrast, highly skilled and highly qualified workers represent much smaller proportions of manpower exports. Their numbers grew gradually until 2015–2016, reflecting demand in technical and professional roles, but remain limited compared to skilled and unskilled labor. The COVID-19 pandemic (2020–2021) caused a steep fall across all categories, especially among skilled and unskilled workers. Moreover, in 2022–2023, manpower exports saw a strong recovery, especially among unskilled, skilled, and semi-skilled workers.

Figure 2 Emigration Trend from Last Fourteen Years (2011-2024)



Source: Source: Author's compilation based on GOP (n.d.).

Figure 2 represents the emigration trends from 2011 to 2024. In 2011, the total manpower export from Pakistan was about 0.45 million, which rose sharply in 2012 and 2013, reaching more than 0.62 million workers. The trend continued upward in 2014 and peaked in 2015 at nearly 0.95 million, the

highest during this period. Although a slight decline was observed in 2016, the number still remained above 0.83 million. From 2017 to 2018, manpower exports dropped significantly, falling to around 0.38 million in 2018. However, the figure recovered in 2019, crossing 0.62 million again. A sharp decline occurred in 2020 and 2021 due to the COVID-19 pandemic, reducing manpower exports to just 0.22–0.28 million. With the easing of restrictions, overseas employment bounced back strongly in 2022 and 2023, when more than 0.83–0.86 million workers were registered. In 2024, emigration slightly declined again but still stayed high at around 0.72 million, reflecting a stable recovery trend.

#### 4.1.1. Overseas Employment Corporation

The Overseas Employment Corporation (OEC) was established by the Govt. of Pakistan in 1976 as a public sector recruitment body to facilitate the process of emigration for workers from Pakistan. In legal terms, the OEC is an autonomous body under administrative control of Ministry of Overseas Pakistanis and Human Resource Development. The OEC generally manages the Govt. to Govt. level contracts for the export of manpower from Pakistan to different countries. A brief description of the performance of the OEC is presented in the table below.

*Table 8. Top Ten Countries by Number of Persons Proceeded Abroad for Employment through OEC (1976–2023)*

Sr. #	Country	1976-85	1986-95	1996-07	2008-17	2018	2019	2020	2021	2022	2023	Total
1	Saudi Arabia	26,253	17,759	6,018	3,254	77	50	37	6	184	72	53,710
2	UAE	6,854	6,380	12,720	524	11	54	-	-	-	-	26,543
3	Kuwait	5,514	3,719	715	6	-	-	404	1,553	578	593	13,082
4	South Korea	-	643	37	6,838	778	493	49	63	1,991	1,099	11,991
5	Libya	5,944	1,697	3,116	235	-	-	-	-	4	-	10,996
6	Oman	4,396	1,563	1,166	942	1	13	12	1	-	-	8,094
7	Qatar	2,665	2,952	1,003	265	31	44	1	2	19	4	6,986
8	Iraq	5,635	582	-	-	-	-	-	-	-	-	6,217
9	Malaysia	16	250	4,716	209	9	4	5	-	-	-	5,209
10	Bahrain	912	343	244	33	-	-	-	-	1	4	1,537

*Source: GOP (2024).*

The table 7 presents data on Pakistanis who proceeded abroad for employment through OEC between 1976 and 2023. Saudi Arabia remained the leading destination with 53,710 workers, followed by the UAE (26,543) and Kuwait (13,082), reaffirming the Middle East as the primary hub for Pakistani workers. South Korea (11,991) and Malaysia (5,209) emerged as strong Asian destinations in subsequent decades, whereas Libya (10,996) and Iraq (6,217) lost significance due to political instability. Oman (8,094) and Qatar (6,986) maintained steady demand, whereas Bahrain, with only 1,537 workers, had limited inflows. Overall, the data highlights the general dominance of Gulf countries, the growth of East Asia, and the deterioration of conflict-affected states such as Iraq and Libya.

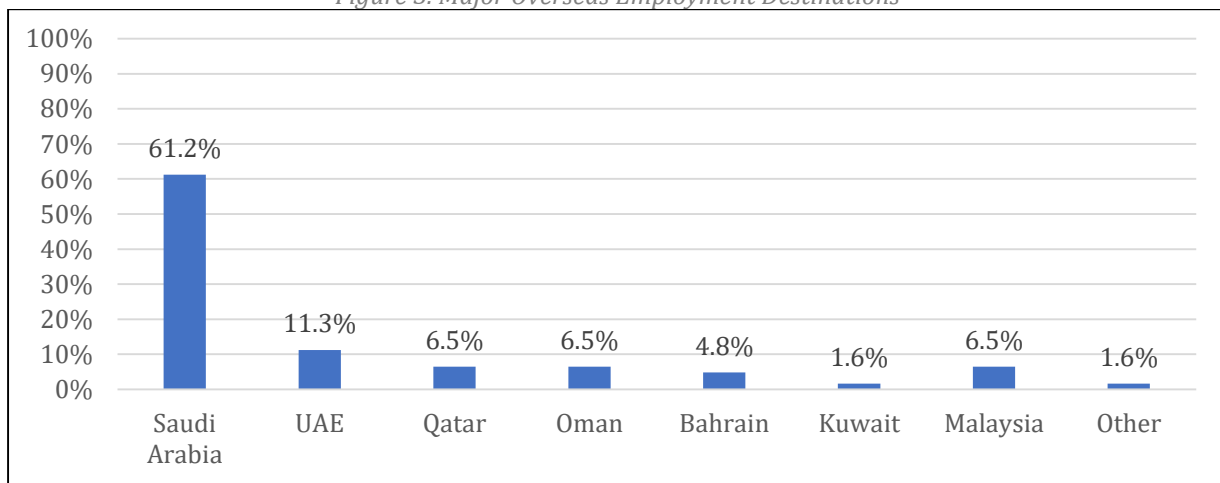
#### 4.2. Survey of Overseas Employment Promoters (OEPs)

At the second stage of this study, we conducted a survey of OEPs to examine the operational issues and challenges in manpower export system. We approached 40 OEPs through a questionnaire designed to collect data on themes such as recruitment issues, costs of overseas employment, dealing

with foreign employers, after-departure support services, regulatory hurdles etc. On these themes, we asked the closed ended questions and to know the operational aspects of the OEPs and the workers, we also received their input through open-ended questions. A brief results of the questionnaire filled by the OEPs is presented here;

**Overseas Employment Destinations of Workers:** The figure 3 indicates that Saudi Arabia is by far the dominant destination for overseas employment, accounting for 61.2% of the responses. The UAE (11.3%) emerges as the next most common destination, followed by Qatar, Oman, and Malaysia, each accounting for 6.5%, reflecting some moderate employment destinations for overseas workers. Whereas, Bahrain accounts for 4.8%, while Kuwait and other countries represent the smallest shares at 1.6% each. In summary, the data indicate that most of the overseas workers go to the Gulf countries with Malaysia as the ultimate destination for them.

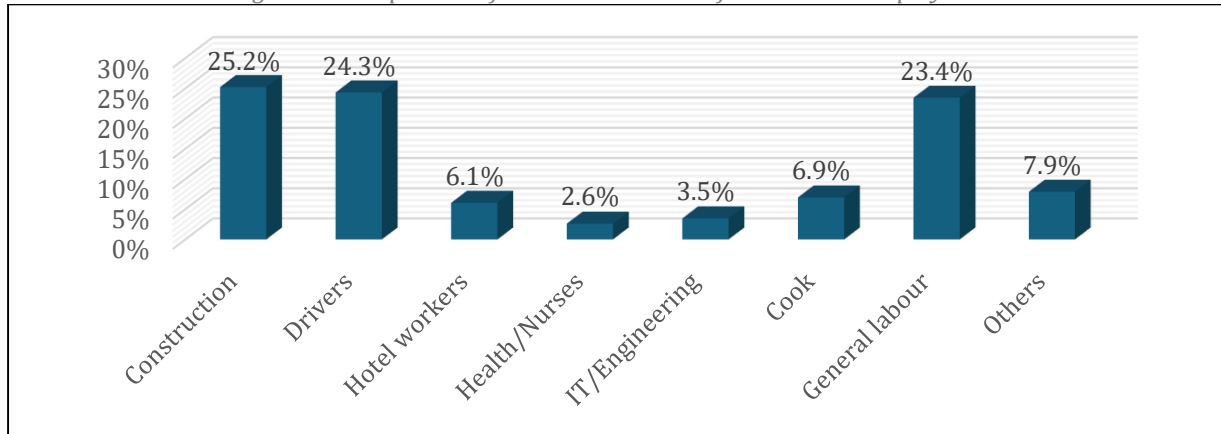
*Figure 3. Major Overseas Employment Destinations*



*Source: Author's compilations.*

**Main Occupations Recruited for Overseas Employment:** The figure 4 shows that overseas recruitment is largely concentrated in labors, drivers and construction related occupations. Construction work (25.2%) represents the most common recruited occupation, closely followed by drivers and labors (each 23.4%), signifying solid demand for manual and working roles. Other occupations including academicians (7.9%) and cooks (6.9%) also account for a remarkable share of recruitment. Conversely, hotel workers (6.1%), IT/Engineering (3.5%), and health professionals/nurses (2.6%) constitute comparatively smaller proportions, indicating low recruitment in professional and technical areas.

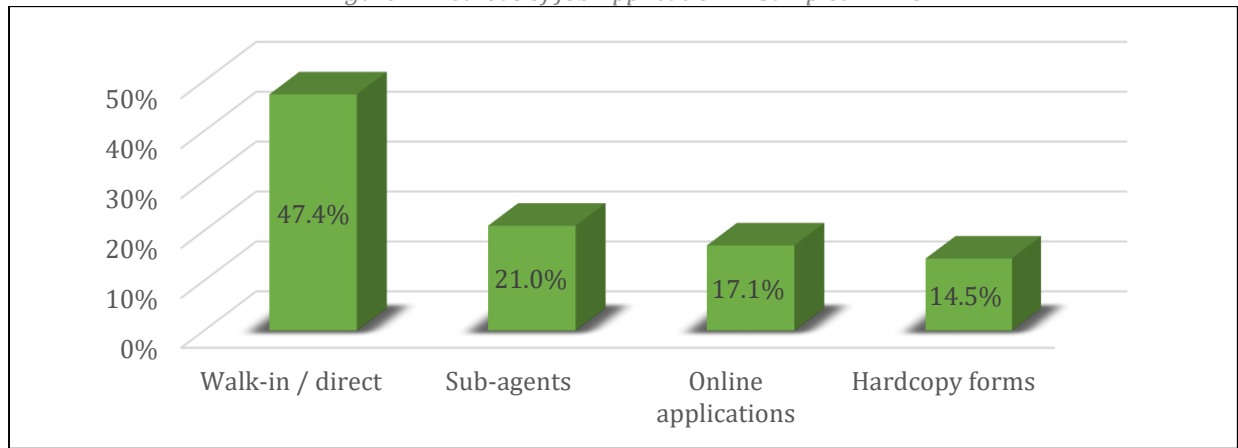
Figure 4. Occupations of Workers Recruited for Overseas Employment



Source: Author's compilations.

**How people apply for job in your firm?:** The data of figure 5 indicate that the most common method for applying to jobs in the sampled firms is walk-in or direct applications, reported by 47.4% of respondents. Sub-agents are also a substantial channel, used by 21.0% of applicants, highlighting the role of mediators in connecting job seekers with OEPs. Whereas, online applications (17.1%) and hardcopy forms (14.5%) are less frequently used, indicating that digital or formal applications are not the primary recruitment channels.

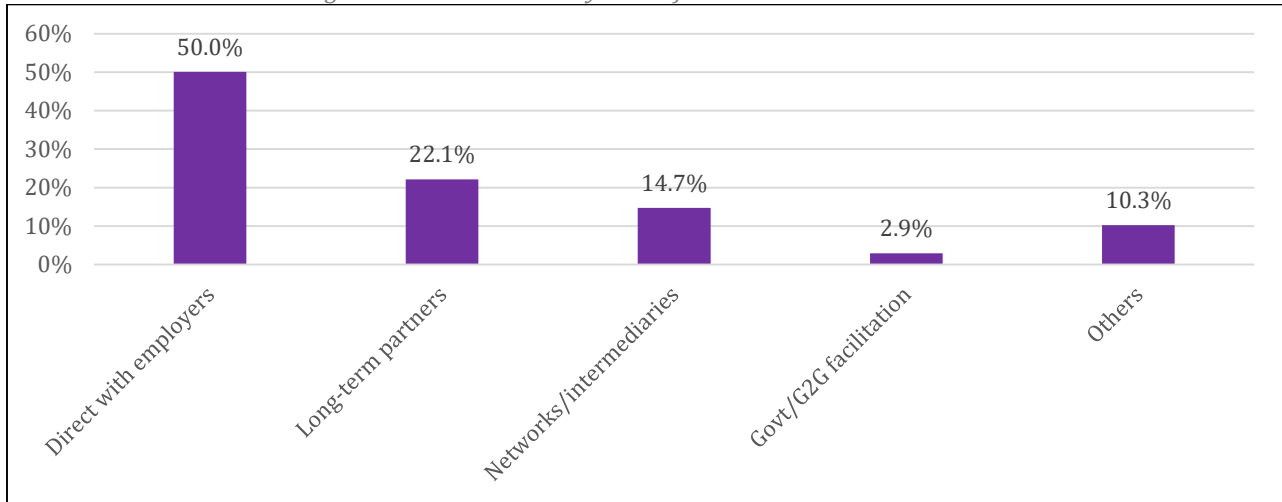
Figure 5. Methods of Job Application in Sampled Firms



Source: Author's compilations.

**How do you usually secure foreign contracts?:** Figure 6 reveals that the majority of OEPs recruit workers directly with employers, accounting for 50%, suggesting a strong preference for establishing direct relationships with abroad employers. Long-term partners are utilized by 22.1% of firms, reflecting the reliance on trusted, ongoing collaborations for recruitment. While, networks or intermediaries serve as a channel for 14.7% of firms, showing that third-party connections are used to a moderate extent. Govt. to Govt. facilitation is relatively rare, at 2.9 %, indicating narrow engagement with formal G2G recruitment system. Other channels account for 10.3%, indicating that some firms use additional, less common recruitment methods.

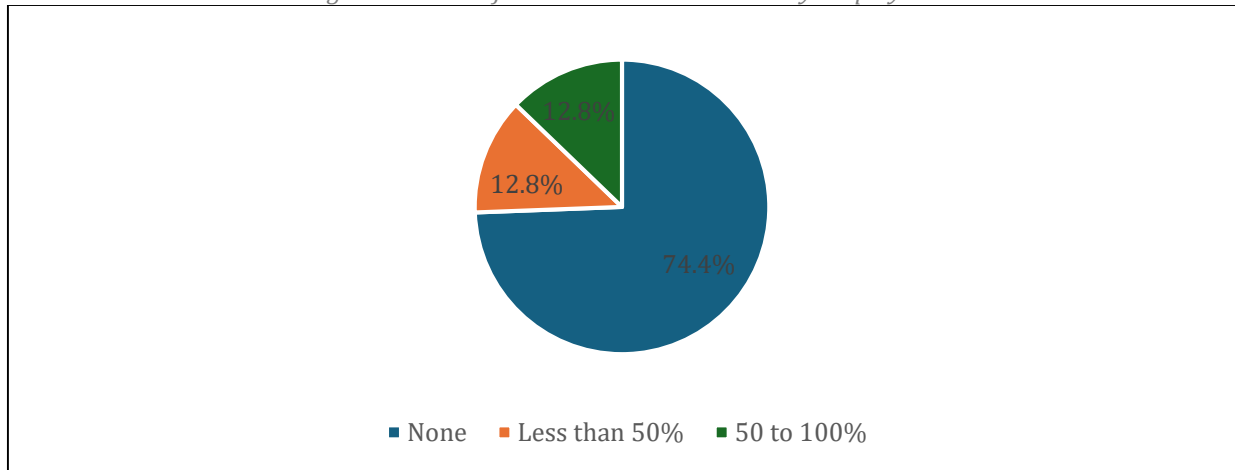
Figure 6. Channels Used by Firms for Overseas Recruitment



Source: Author's compilations.

**Share of cost borne by employer:** According to figure 7 data, the employer does not bear any recruitment costs in majority case, with 74.4%. Only 12.8% of employers cover less than 50% of the costs, and another 12.8% cover 50 to 100% of recruitment expenses, which shows most of the cost is bore by applicants/workers themselves.

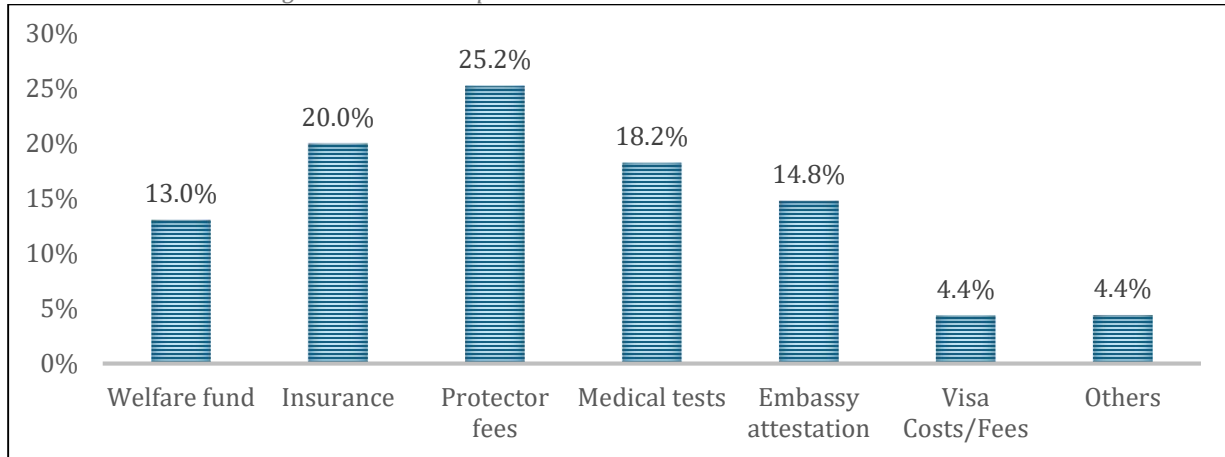
Figure 7. Share of Recruitment Costs Borne by Employers



Source: Author's compilations.

**Main compliance cost factors:** Figure 8 shows that the primary compliance costs for overseas recruitment are associated with protector fees (25.2%), insurance (20%), and medical tests (18.2%), suggesting that these represent the largest financial obligations for recruitment agencies. Embassy attestation (14.8%) and welfare fund contributions (13%) are also substantial but relatively lower. Costs related to visa fees and other factors (4.4 each%) are minor in comparison.

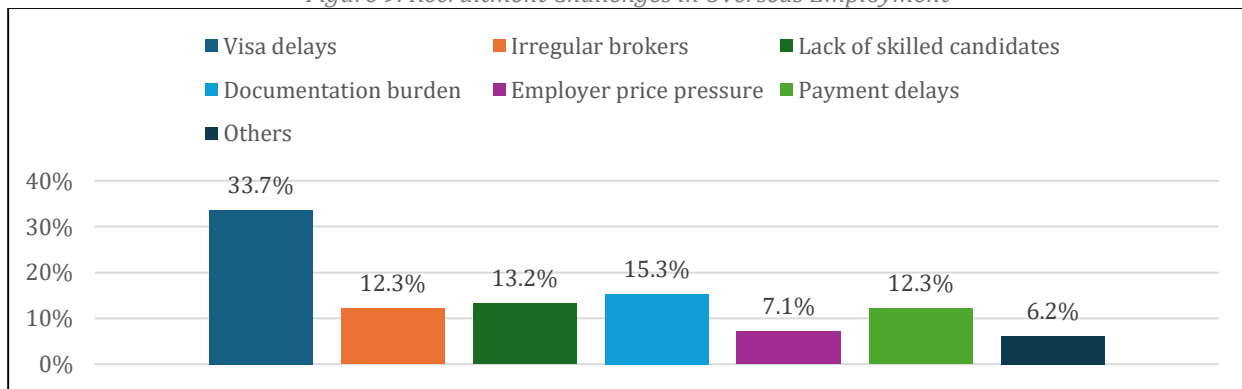
Figure 8. Main Compliance Cost Factors in Overseas Recruitment



Source: Author's compilations.

**Top challenges in recruitment:** Figure 9 shows that visa delays are the most significant challenge in overseas recruitment, reported by 33.7%, emphasizing bureaucratic and administrative hurdles as a major constraint. Other notable challenges include documentation burden (15.3%) and lack of skilled candidates (13.2%), indicating difficulties in meeting procedural requirements and finding suitably qualified workers. Irregular brokers and payment delays (12.3% each) also affect the recruitment process, reflecting issues with intermediaries and financial flows. Employer price pressure (7.1%) is reported less frequently. Overall, it was reported that recently introduced Taqamul/NEFT test has become an unnecessary burden, especially for unskilled labor. These workers are often made to sit in front of computers, which they cannot understand, as they are only fit for manual tasks like loading and similar work. Such tests are not relevant for unskilled labor and result in extra costs for the workers. Many even fail the test despite being medically fit, which leads to loss of money and unnecessary visa delays. Unskilled labor categories should be exempted from such testing requirements.

Figure 9. Recruitment Challenges in Overseas Employment

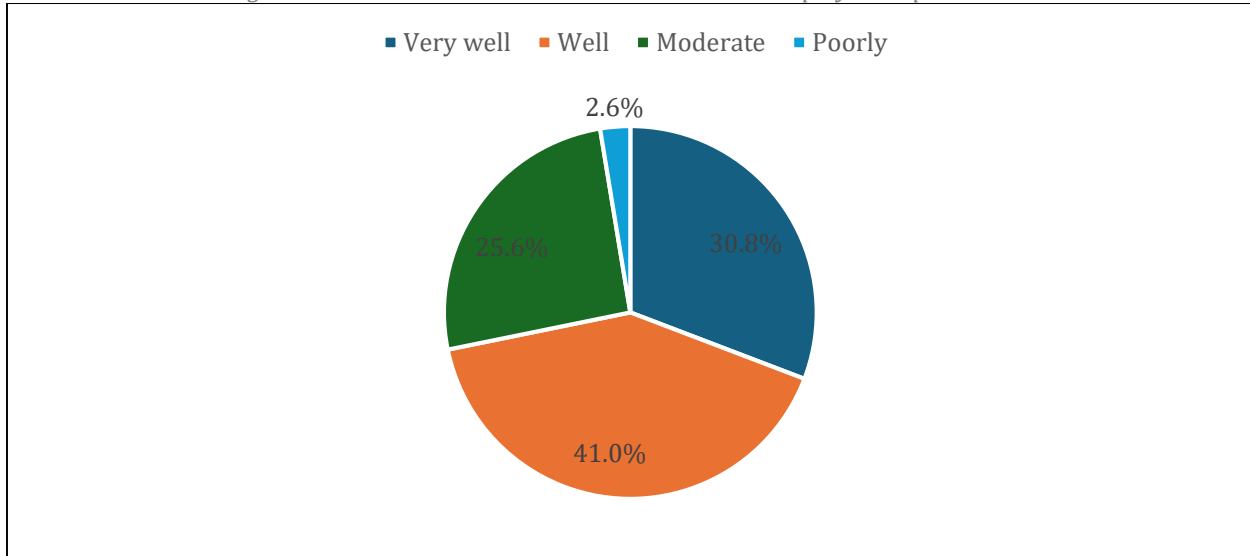


Source: Author's compilations.

**How well do candidates' skills match employer requirements?:** The data of figure 10 indicate that skills of candidates generally meet employer requirements to a satisfactory level. Precisely, 41.0% of respondents reported that candidates' skills match well, while 30.8% indicated a very good

match. However, moderate alignment was reported by 25.6%, suggesting that a quarter of candidates only partially meet expectations. Whereas, only a small fraction, 2.6%, were considered poorly matched, indicating minimal skill gaps.

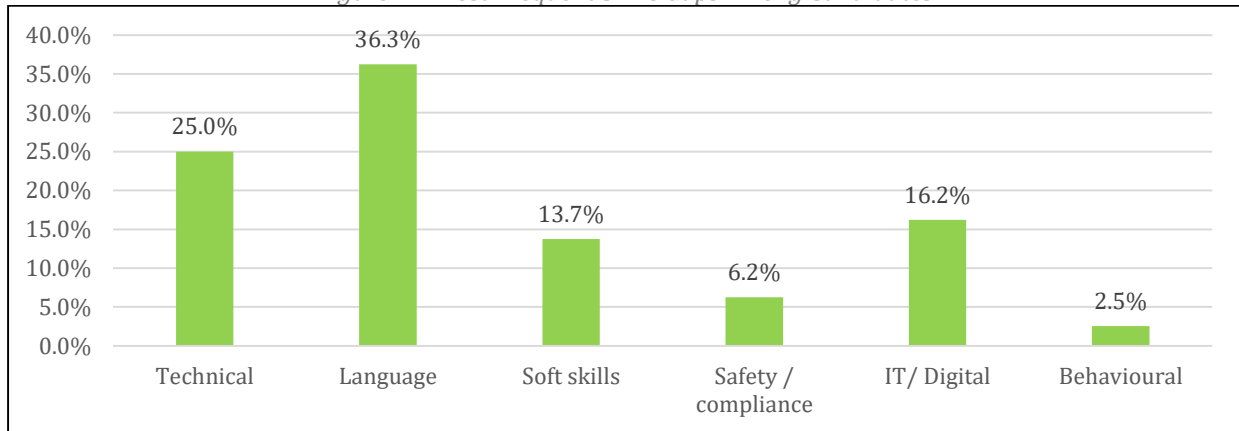
Figure 10. Match between Candidates' Skills and Employer Requirements



Source: Author's compilations.

**Most frequent skills gaps:** The data shows that language skills represent the most common gap among candidates, reported by 36.3% of respondents, highlighting a considerable challenge in meeting communication requirements. Technical skills are also a main concern, affecting 25% of candidates, while IT/digital skills (16.2%) and soft skills (13.7%) present moderate gaps. Moreover, safety/compliance skills (6.2%) and behavioral skills (2.5%) are less frequently cited skill as compared to others.

Figure 11. Most Frequent Skills Gaps Among Candidates

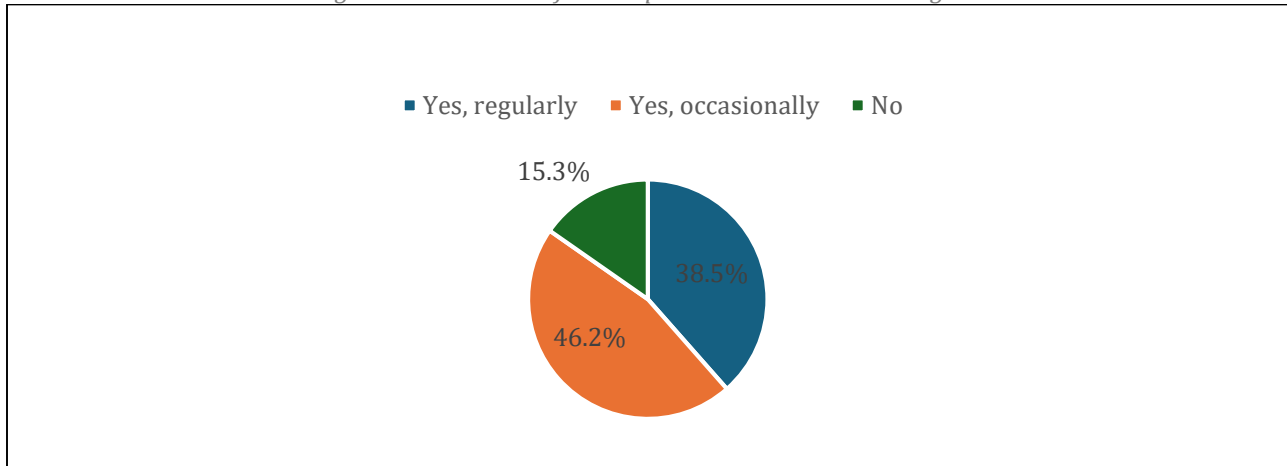


Source: Author's compilations.

**Do you provide/arrange pre-departure or skills training?:** The result of figure 12 shows that the majority of OEPs provide or arrange pre-departure or skills training for candidates. Explicitly, 46.2% of OEPs offer such training occasionally, while 38.5% specified that they provide training regularly.

In contrast, 15.3% of OEPs do not offer any pre-departure or other skills training to the applicants/overseas workers.

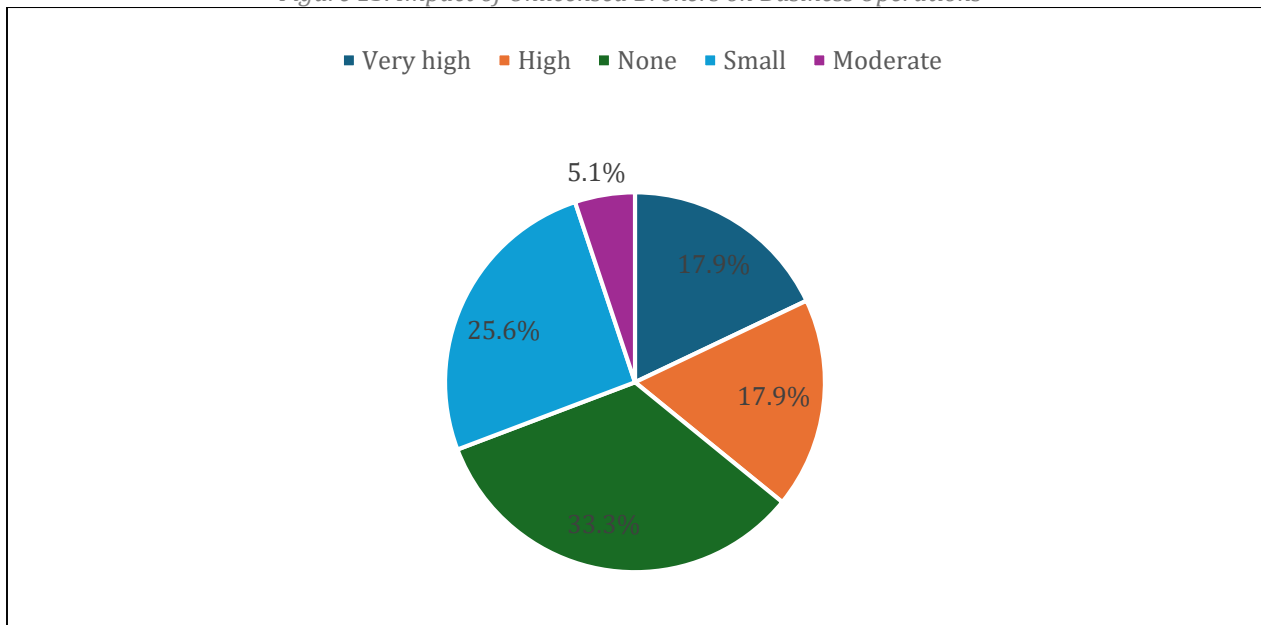
Figure 12. Provision of Pre-Departure and Skills Training



Source: Author's compilations.

**Impact of unlicensed brokers on your business:** Figure 13 indicates varied perceptions regarding the impact of unlicensed brokers on OEP operations. A combined 35.8% of OEPs reported a high or very high impact (17.9% each), suggesting that unlicensed brokers pose a grave challenge for a substantial proportion of OEP. Whereas, 33.3% of OPES reported no impact, indicating that some firms are either insulated from or unaffected by such brokers. Furthermore, 25.6% perceived a small impact, while only 5.1% reported a reasonable impact.

Figure 13. Impact of Unlicensed Brokers on Business Operations

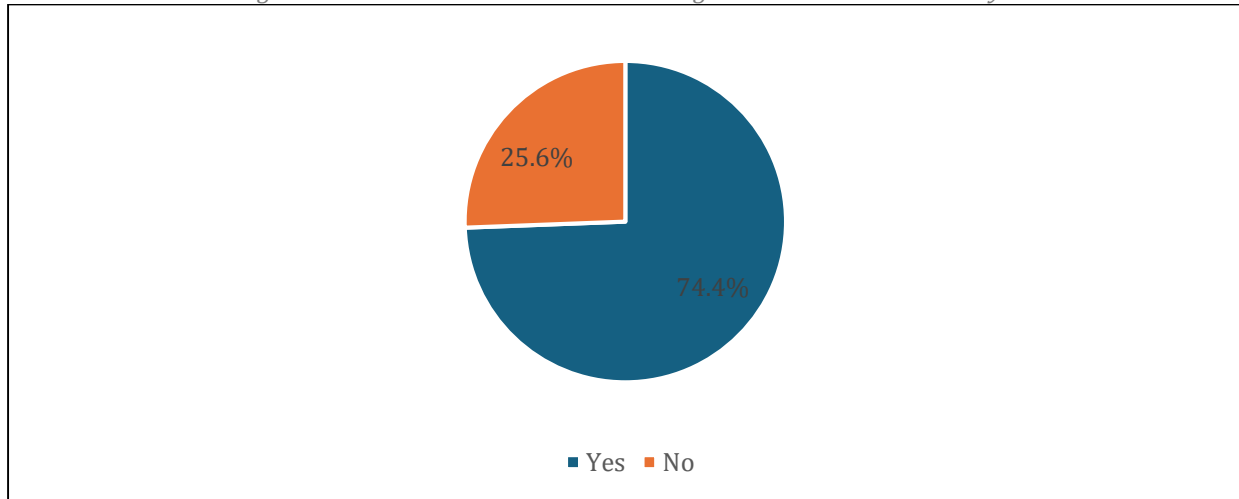


Source: Author's compilations.

**Have you lost contracts due to processing/documentation delays?:** The data of figure 14 shows that majority of OEPs (74.4%) have lost contracts due to processing or documentation delays,

indicating administrative inefficiencies as a critical challenge in overseas recruitment. Whereas only 25.6% of OEPs reported no contract loss due to such delays.

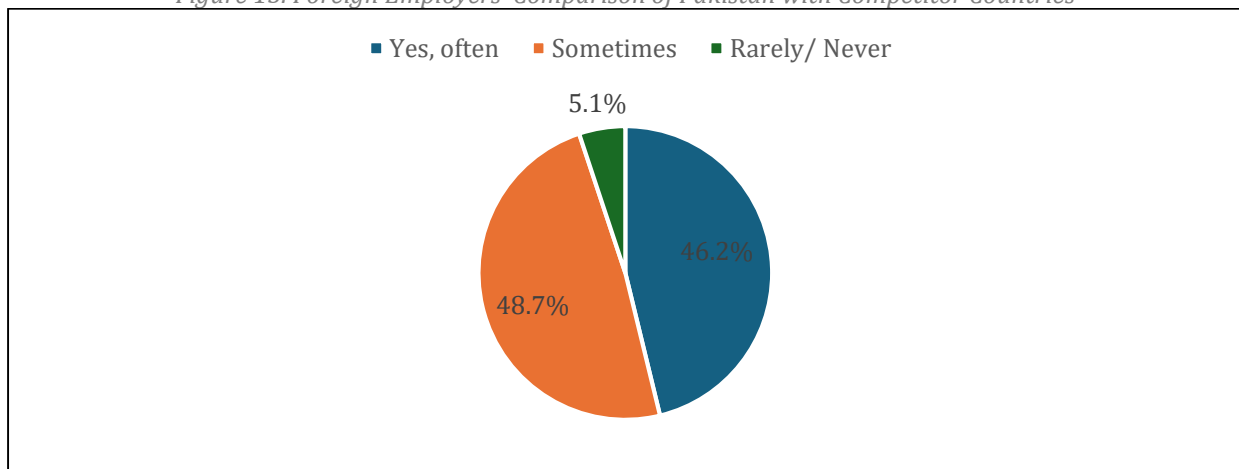
Figure 14. Contract Loss Due to Processing and Documentation Delays



Source: Author's compilations.

**Do foreign employers compare Pakistan unfavorably to competitor countries?:** Figure 15 highlights that foreign employers frequently compare Pakistan with other similar countries who supply labors. A total of 46.2% reported that such unfavorable comparisons occur often, while 48.7% indicated they occur sometimes comparatively. However, only a small proportion (5.1%) reported that Pakistan is rarely or never compared unfavorably.

Figure 15. Foreign Employers' Comparison of Pakistan with Competitor Countries

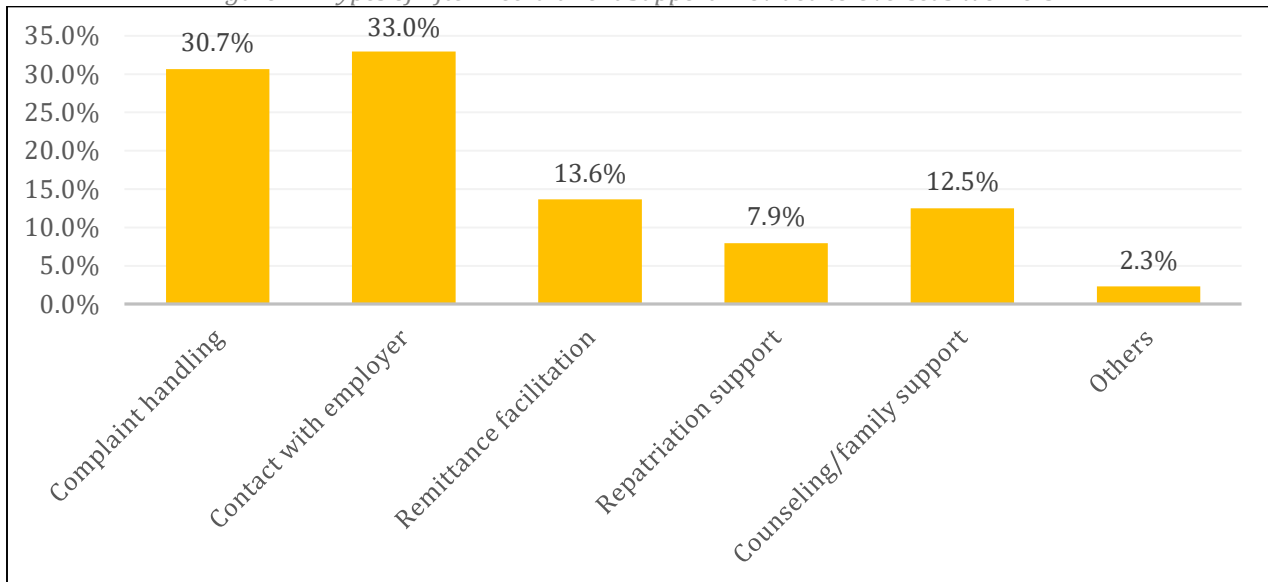


Source: Author's compilations.

**What type of after-recruitment support do you provide?:** Figure 16 highlights that OPEs provide a range of support services to overseas workers after recruitment. Most common support offer includes maintaining contact with employers (74.4%) and complaint handling (69.2%), highlighting firms' active role in resolving workplace issues and ensuring coordination between workers and employers. Moreover, remittance facilitation (30.8%) and counseling or family support (28.2%) are provided by a smaller but considerable share of OEPs, indicating attention to workers' financial and

social well-being. Whereas, repatriation support (17.9%) is less frequently offered, while other forms of support (5.2%) are very low.

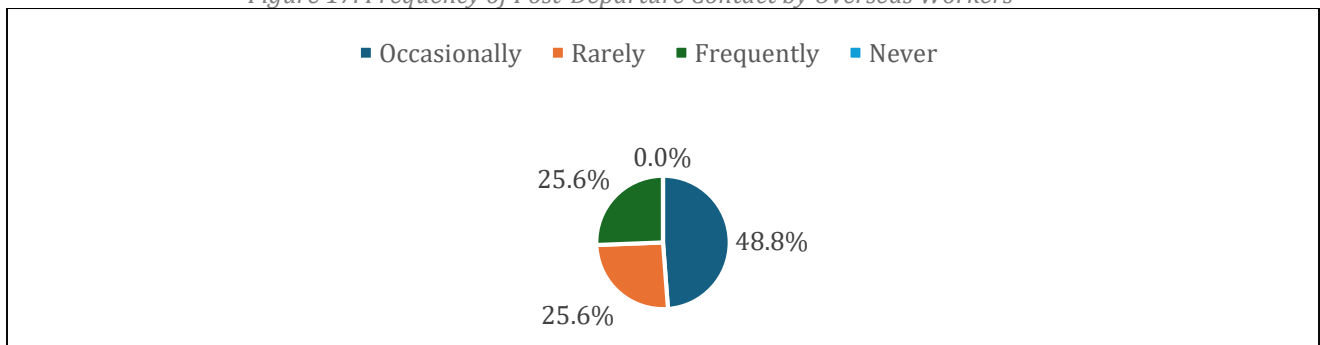
Figure 16. Types of After-Recruitment Support Provided to Overseas Workers



Source: Author's compilations.

**How often do workers contact your agency after departure?:** According to the figure 17, overseas workers continue to maintain contact with their agencies after departure, though the frequency varies. About 48.8% reported that overseas workers contact their agency occasionally, making it the most common pattern. 25.6% each indicated that workers contact them frequently or rarely, suggesting divergent levels of post departure engagement depending on situations. Whereas, no OEP reported that workers never contact the them after departure from Pakistan.

Figure 17. Frequency of Post-Departure Contact by Overseas Workers

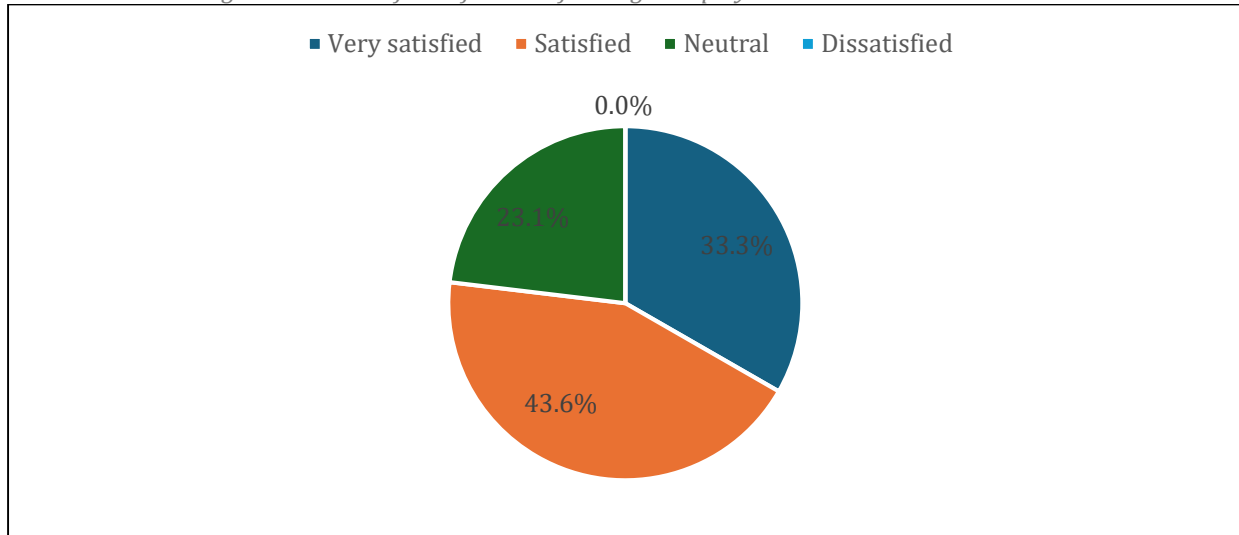


Source: Author's compilations.

**How satisfied are foreign employers with Pakistani workers?:** Figure 18 indicates, generally high level of satisfaction among foreign employers with Pakistani workers. A combined 76.9% of respondents reported that employers are either very satisfied (33.3%) or satisfied (43.6%), indicating positive perceptions of workers' performance and reliability. Moreover, 23.1% of respondents documented a neutral level of satisfaction, suggesting scope for further improvement in

skills or work readiness. Meanwhile no OEP has documented dissatisfaction with the performance of Pakistani workers by foreign employers.

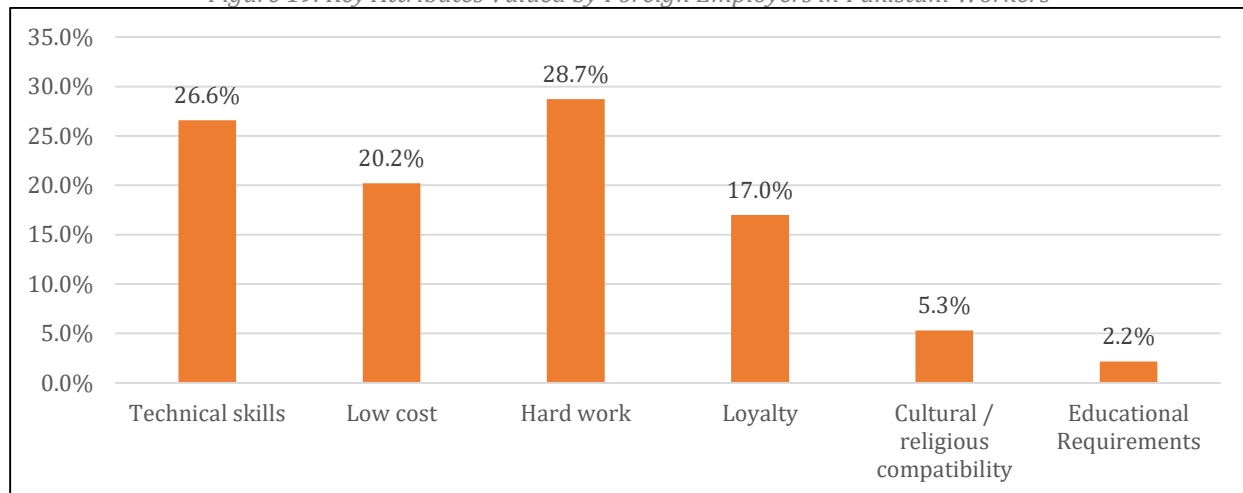
Figure 18. Level of Satisfaction of Foreign Employers with Pakistani Workers



Source: Author's compilations.

**What do employers value most?:** Data of figure 19 indicates that foreign employers place the highest value on hard work (28.7%), followed closely by technical skills (26.6%), reflecting the importance of productivity and job related competencies. Whereas, low labor cost (20.2%) and loyalty (17%) are also substantial factors, indicating that both economic considerations and worker commitment influence employer preferences. Conversely, cultural or religious compatibility (5.3%) and formal educational requirements (2.2%) are comparatively less significant factor for overseas employers.

Figure 19. Key Attributes Valued by Foreign Employers in Pakistani Workers

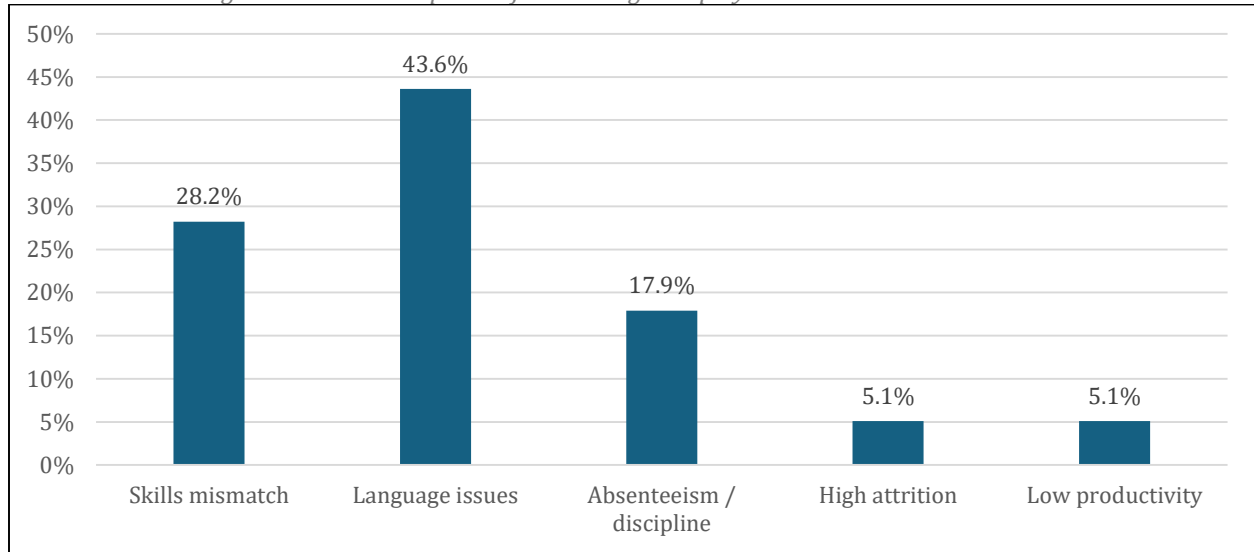


Source: Author's compilations.

**Main complaints from employers about Pakistani workers:** Figure 20 reveals that the most common complaint from employers includes language issues (43.6%), reflecting communication

challenges as a key barrier to effective performance. Skills mismatch (28.2%) is also an important concern, indicating gaps between worker competencies and job requirements. Absenteeism or discipline problems (17.9%) are less frequently reported issues. Meanwhile, high attrition (5.1%) and low productivity (5.1%) are minor issues compared to above- mentioned issues.

Figure 20. Main Complaints from Foreign Employers About Pakistani Workers



Source: Author's compilations.

**What challenges do workers face before departure?:** Table 9 presents the issues faced by overseas employees before departure. According to the data the most common issues are; document preparation (25.6%) and medical/protector clearance (20.5%), highlighting the procedural and regulatory hurdles in the recruitment process. Whereas, high upfront fees (17.9%) and delays in processing (15.4%) also pose major challenges. However, less often reported challenges include skills training (12.8%), embassy process delays (2.6%), Nursing NOC issues or QVP reports (2.6%), and visa issuance delays due to embassy quota systems account for 2.6%.

Table 9. Challenges Faced by Workers Before Departure

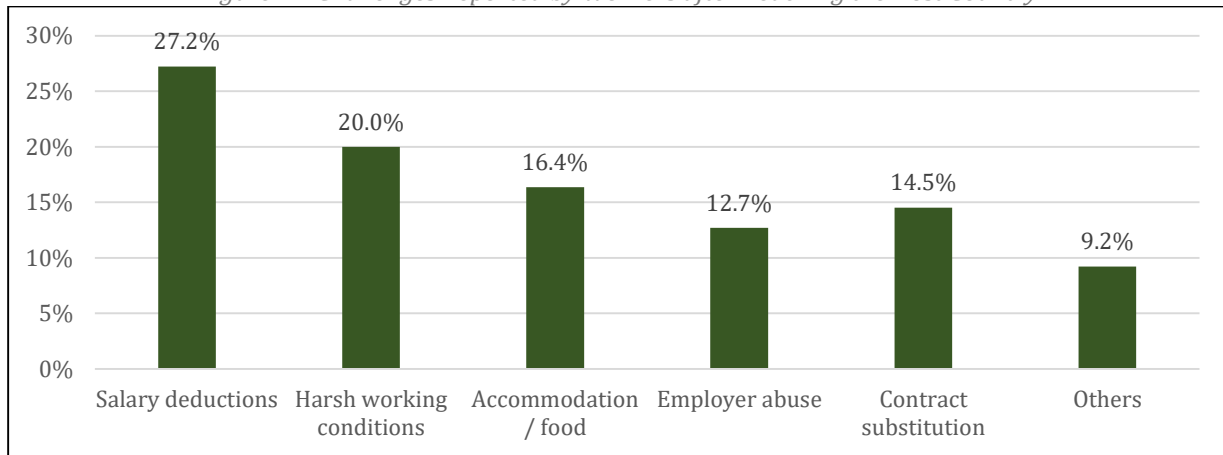
Sr. No.	Challenges/ Issues	Percentage (%)
1	High upfront fees	17.9
2	Document preparation	25.6
3	Skills training	12.8
4	Medical / Protector clearance	20.5
5	Delays	15.4
6	embassy process delays	2.6
7	Nursing NOC Issues, QVP Reports	2.6
8	visa issuance takes too time due to embassy quota system	2.6

Source: Author's compilations.

**What challenges do workers report after reaching host country?:** Data of Figure 21 indicate that workers face many challenges after reaching the employer country. The data shows that main issue is salary deductions (27.2%), indicating financial grumbles. Whereas other common issues include harsh working conditions (20%) and problems with accommodation or food (16.4%), reflecting living and workplace difficulties. Moreover, contract substitution (14.5%) and employer abuse

(12.7%) are also reported, highlighting breaches of agreed terms and mistreatment. Other issues reported by overseas workers account for 9.2%.

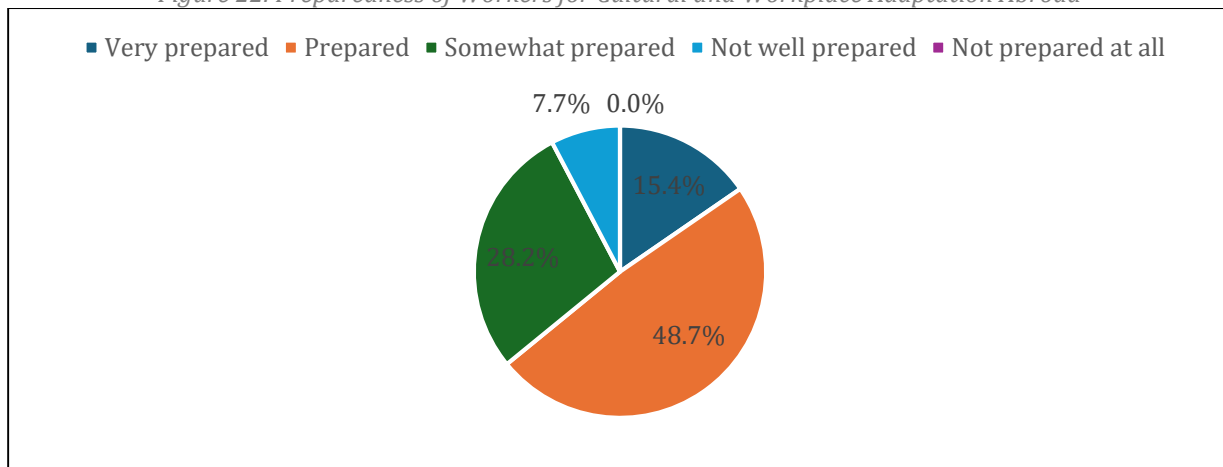
Figure 21. Challenges Reported by Workers after Reaching the Host Country



Source: Author's compilations.

**How prepared are workers for cultural and workplace adaptation abroad?:** According to figure 22, the data indicates that most workers are effectively prepared for cultural and workplace adaptation in host countries. Overall, 15.4% of workers are either very prepared or prepared, indicating a strong level of readiness. 28.2% are somewhat prepared, reflecting that a substantial portion may benefit from additional pre-departure training. Only 7.7% are not well prepared while none (0%) are completely unprepared.

Figure 22. Preparedness of Workers for Cultural and Workplace Adaptation Abroad



Source: Author's compilations.

**Summary of Responses of the OEPs for Open-Ended Questions:** The summary responses are given in table 10:

Table 10. Summary of Responses of the OEPs for Open-Ended Questions

Themes	Key Issues Identified	Evidence from Responses	Interpretation
Worker Exploitation in Destination Countries	Salary deductions, contract substitution, employer abuse, poor accommodation, harsh working conditions	OEPs frequently mentioned wage cuts, difficult work environments, and contract violations after worker arrival in Gulf countries.	Indicates weak enforcement of employment contracts and limited protection mechanisms for migrant workers in destination countries.
Skill Gaps and Inadequate Worker Training	Lack of technical skills, insufficient vocational training, poor awareness of workplace norms	The word “training” appeared repeatedly across responses, emphasizing the need for better skill development and pre-departure preparation.	Highlights the importance of strengthening technical training systems and aligning skills with international labor market demand.
Regulatory and Administrative Challenges	Complex procedures, bureaucratic delays, lack of digital systems	Respondents pointed out slow processing at Protector offices and cumbersome documentation procedures.	Administrative inefficiencies increase recruitment costs and reduce competitiveness of Pakistani manpower exporters.
Weak Regulation of Sub-Agents	Informal recruitment networks, lack of accountability, risk of worker exploitation	Many OEPs rely on sub-agents for sourcing workers, often without formal oversight mechanisms.	Poor regulation of sub-agents creates risks of misinformation, illegal fee collection, and worker exploitation.
Financial Pressures in Recruitment Market	Recruitment cost pressures, worker expectations for cheaper migration	OEPs reported pressure from both employers and workers regarding recruitment costs and speed of placement.	These pressures can encourage informal practices and distort recruitment processes.
Limited Post-Departure Worker Support	Complaint handling, mediation with employers, reliance on embassies	OEPs reported providing assistance to workers abroad but indicated limited institutional mechanisms.	Suggests the need for stronger support systems for Pakistani workers through embassies and labor attachés.

Source: Author’s compilations.

**Key findings are:**

- i. Manpower exports from Pakistan are concentrated in low-skilled jobs such as drivers, laborers, drivers etc. This trend indicates that Pakistan mostly exports low-skilled labor thereby limiting the potential for higher earnings and remittances.
- ii. Most manpower exports from Pakistan are based in Gulf countries. Within Gulf, Saudi Arabia and UAE constitute the largest share of Pakistani workers. The higher level of labor concentration in these countries limits diversification and carries geographic economic risks.
- iii. Manpower exports from Pakistan are largely dependent on the Overseas Employment Promoters (OEPs) which are private sector firms having links with foreign employers. The role of Govt.to Govt. level contracts is limited and needs further expansion to increase the manpower exports from Pakistan.
- iv. The OEPs dealing with the manpower exports report frequent regulatory administrative and operational barriers affecting the overall recruitment process. These regulatory barriers enhance the time and cost for the workers seeking foreign jobs.
- v. The results of survey indicate that Pakistani workers have significant skills gap and communication issues. The technical skills and language deficiency negatively affect the earning potential of the workers thereby reducing remittances.
- vi. The Pakistani workers face significant financial and procedural issues before departing for foreign countries. The financial costs include higher upfront costs, regulatory charges, medical and skills testing fee etc. The procedural issues such as documentation, protectorate clearance, certification etc. also negatively affect the manpower exports.

- vii. The migrant workers from Pakistan also face the workplace vulnerabilities such as salary deductions, harsh working conditions, contract substitution, employers abuse etc. These issues indicate weak contract enforcement and limited worker protection mechanism.

**Emerging Challenges for Pakistani Labor in Gulf Countries:** In addition to the above issues, there are some other emerging challenges for the manpower export from Pakistan. As a part of our discussion with the OEPs, workers and other stakeholders and review of labor market review reports for the Gulf Region, there are some emerging challenges for Pakistani workers aiming to emigrate to the Gulf countries. A brief description of these challenges is presented here;

- viii. **Workforce Nationalization:** Saudi Arabia and the UAE has directed their private and public sector bodies to recruit at-least 10% of their skilled workforce from the local population. Additionally, temporary work visas are being reduced from many job categories to prefer hiring local employees. Along with this, employers are being asked to prefer local staff to increase the employment rate. These localization policies are negatively affecting the potential of hiring Pakistani labor.
- ix. **Rising Certification Barriers:** Another issue arising in the Gulf labor market is the rising certification requirements for skilled, semi-skilled and low-skilled workers. The certification requirement demands training and testing of skilled employees before their departure to the Gulf countries. Since a large majority of Pakistani labor has lower level of literacy, the certification requirements are adding an additional layer of financial and administrative burden.
- x. **Heat & Climate Issue:** Most of the Pakistani labor emigrating to the Gulf labor market works in the constructions sector where workers must complete their tasks under open skies. The rise in global temperature is also affecting the Gulf region and it is becoming very difficult for labor to work in extreme heat during daytime.
- xi. **Economic Pressure:** The local economies of Gulf are also experiencing economic pressure due to the limited revenues sources such as oil and gas and increasing local population demands. With tight fiscal space, some Gulf countries have started implementing consumption and income taxes to collect the desired revenues. Employers are also facing cuts in their profits due to the applicable taxes reducing their appetite for expansion and hiring more labor.
- xii. **Competition from other nations:** The last key factor affecting the Pakistani labor in the Gulf market is the competition from workers coming from other nations such as India, Bangladesh, Sri Lanka etc. A large majority of workers from these countries are joining the Gulf labor market with required professional certification and training. There is a dire need to impart professional training to the unskilled Pakistani workers going to the Gulf market so that they can get the desired jobs.

#### **4.4. Critical Review of Regulatory & Skills Testing System in Pakistan**

##### **4.4.1. Critical Review of BEOE:**

At third stage of the study, we examined the regulatory role and the working BEOE which is the regulatory body of the OEPs. Through discussion with the senior officers within the BEOE and the close examination of the available digital records, following points are worthy of consideration.

**I. Regulatory Scope:** The BEOE is structured through the regulatory lens set by the Emigration ordinance 1979 and the Emigration Rules. These regulatory tools are aimed at protection of emigrant workers, regulation and monitoring of OEPs and overseeing the overseas employment processes through administrative measures. The overall design of the BEOE is based on protection oriented

regulatory scope for preventing fraud and exploitation of workers. Although, the BEOE is actively monitoring the working of the OEPs and cancels their licenses based on reliable evidence. However, there is a need to balance the protection-oriented regulatory scope with the modern economic dynamics ensuring efficiency, digitalization and competitiveness.

**II. Operational Efficiency:** The operational aspects of the BEOE include a range of administrative steps such as approving foreign job recruitment requests, supervising OEPs, registering selected workers through Protectorates of Emigrants, coordination with the embassies etc. These administrative tasks consume a lot of time and effort of the staff with occasional delays due to the higher processing time. As our above survey indicates, a lot of OEPs have reported that they lose foreign job contracts due to the long processing time at embassies and regulatory bodies. There, it is required to reassess the workflow chain and reduce the non-important steps resulting in lower administrative burden for the regulatory bodies.

**III. Partial Digitalization:** The overall emigration process is partially digitalized as coordination among OEPs, BEOE and the workers remain isolated. Although the BEOE is digitalized to the extent of foreign job registration and the coordination with the OEPs, there is still needed to develop a complete end to end digital system that includes workers and other related departments with clear service delivery timelines. Such a digital system should aim to provide real-time tracking of the submitted applications against a foreign job number along with minimizing the needs of physical verification of documents and in-person visits. A responsive, comprehensive and use-friendly digital system will enable Pakistan to successfully compete in the labor market.

**IV. Monitoring of Recruitment Costs:** The issue of recruitment costs borne by the workers for foreign jobs is of significant concern as our above survey shows that workers typically pay between Rs. 500,000 to 1.5 million to secure foreign jobs advertised by the OEPs. Along with this, the workers also pay for skills testing fees, administrative fees for the Protectorate of Emigrants, insurance, medical fee and other costs. These costs put a significant burden on the workers who are mostly from lower income sections of society. The BEOE should develop a mechanism to monitor and cap the upfront charges for securing foreign jobs and rationalize the administrative costs for the workers to enhance their interests. It is also required to develop some cost-sharing mechanism so that workers, OEPs and foreign employers share the financial burden in the optimum manner.

**V. Coordinating Skills Testing:** The foreign employers now usually require skills-testing of workers in their home countries before departure. There are limited skills-testing centers in Pakistan and workers have also acquired skills in informal economic establishments without any proper certifications. To enhance the quality of Pakistani manpower, it is required that the regulatory body, OEPs and other stakeholders develop a joint mechanism for skills training and testing as per international acceptable standards. At present, the skills testing requirements are placing financial burden on workers and causing significant time delays in securing foreign jobs. The regulatory body should play its role by coordinating the working of OEPs, skills testing centers such as NAVTCC and provincial technical education bodies.

**VI. Enforcement Challenges:** The phenomena of informal agents, un-registered brokers still exist in the manpower export system of Pakistan. The presence of such informal intermediation

individuals/bodies have a huge impact on the overall manpower export from Pakistan. These agents typically operate for facilitating the illegal emigration of Pakistani workers to European countries. Since, 95% of active OEPs only deals with manpower exports to the Gulf countries, the informal agents mechanism lure workers to higher wages destination such as Italy, Greece, Spain, France etc. The BEOE needs to develop tools to monitor and report the presence of illegal agents to the law-enforcement bodies so that the emigration process may be made safer and responsive.

#### **4.4.2. Skills Certification System in Pakistan**

The skills certification system in Pakistan is working under the NAVTTC which is the federal skills certification body and the provincial TVETs promoting and certifying skills in the provinces. The National Vocational Education Framework in Pakistan specifies level 1 to 5 skills certification for commercial and industrial workers. The NAVTTC has its own labs for teaching skills such as plumbing, electrician, beauty salon workers, cooking, industrial machines operators etc. The provincial TVET bodies also work on the same domain by offering skills based short courses in their technical institutes. The Trade Testing Bodies also working at provincial levels to assess the learning of skilled workers by arranging their exams. However, the skills education and certification system in Pakistan is suffering from following issues;

- i. Except for NAVTTC Islamabad and Technical Institutes at provincial capitals, there is a lack of adequate labs for providing international standard training to the students in other cities. Alos, the existing labs in big cities require new machines for training the workers on international standards for increasing their productivity.
- ii. There is a lack of international linkages between local skills testing bodies and the international organizations offering skills testing in Pakistan. Since foreign employers prefer their own skills certification agencies, there is a need to invite foreign skills testing bodies in Pakistan to establish more training labs to facilitate workers.
- iii. There is a need to hire more human resources from the business community (specially manufacturing, mining and hospitality sectors) in existing technical training and testing centers who can train and test the workers on new machinery and systems.
- iv. The language barrier also plays a significant role as most of the technical courses require a working knowledge of the English language. The workers seeking employment in the Gulf countries require working knowledge of Arabic.
- v. There is a lack of industry-skills bodies linkages which limits the recruitment of skilled faculty and interaction with new technologies. Along with this, there is a need to re-train and retest the skills of existing workers on new machines to improve the overall productivity.

However, some notable steps have been taken to enhance the skills improvement and certification system in Pakistan which includes:

- vi. The funding of technical education courses through Prime Minister Skills Initiatives enabling free courses for the youth (elected districts).
- vii. Establishment of international skills certification system such as Takamol (Saudi-based) to assess the technical skills of the youth.

- viii. The acceptance of traditional Ustaad Shagird learning and issuing certificates after direct lab-based examination through Recognition of Prior Learning (RPL).
- ix. The provincial governments have also started offering free short-term technical courses to wider segments of society to enhance their technical skills.

**4.5. An Overview of Manpower Exports in South Asia**

Migration for overseas work has long been integral to South Asian countries and continues to exert a considerable global impact due to the region’s large migrant population abroad. Countries such as Afghanistan, Bangladesh, Bhutan India, Nepal, Pakistan and Sri Lanka contribute a substantial share of the global overseas workforce. The OEPs and recruitment agents in South Asian countries, including licensed entities in India, Nepal, Bangladesh, and Pakistan, act as intermediaries that identify, screen, and place low-skilled and semi-skilled workers with international employers, managing visa applications, contract negotiations, and pre-departure orientations. Following table shows the major destinations and average cost for overseas workers from different countries.

*Table 11. Cross-Country Analysis of Labor Migration, Remittances and Recruitment Agencies in South Asia*

Country	Authorities	Average Recruitment Fee (\$)	Typical Destination	Remittance Inflows (2024-25)	Registered OEPs
Bangladesh	Recruiting Agencies licensed by BMET under the Ministry of Expatriates’ Welfare	1700-5200	Gulf Countries	30.3 billion	2,646 licensed recruiting agencies
India	Recruiting Agents registered with the Protector General of Emigrants (PGE)	1000-4000	GCC	135.46 billion	192 registered recruiters
Nepal	Manpower Agencies licensed by the Department of Foreign Employment (DoFE)	1350-2500	GCC	11.5 billion	416 recruiting agencies
Pakistan	Pakistan: Overseas Employment Promoters (OEPs) licensed by the Bureau of Emigration & Overseas Employment (BE&OE)	1500-4,000	GCC	38.3 billion	2,752 valid OEPs
Sri Lanka	Foreign Employment Agencies registered with the Sri Lanka Bureau of Foreign Employment (SLBFE)	700–1800 (approx.)	Middle East	6.5 billion	248 recruiting agencies

*Source: Author’s compilations based GOP (n.dc.).*

**4.6. Opportunities for Manpower Exports**

There are many countries offering work, jobs, talent or skills-based visas to the eligible workers. Based on our discussion with the OEPs, workers and other stakeholders along with review of labor market reports of selected regions, we have provided a brief summary of global opportunities

available for Pakistani workers. Almost all developed economies have offered prescribed entry requirements for skilled workers. In this section, we have provided brief information for the labor market opportunities available in both Gulf and Non-Gulf labor markets. We have also conducted a review of the major skilled based migration programs offered by European countries, USA, Canada, Japan, Korea, Turkey and Australia. A brief summary of these skill-based migration programs is presented in the table below;

*Table 12. Opportunities in Gulf Labor Market for Pakistani Workers*

Sector	Countries	Emerging Opportunities	Key Requirements for Pakistani Workers
Healthcare	Saudi Arabia, UAE, Qatar	Nurses, caregivers, doctors, lab/radiology technicians, pharmacists. Saudi needs 175,000+ extra healthcare workers by 2030 (64,000 nurses alone) as new hospitals are planned under Vision 2030.	Nursing/medical degree + Saudi Commission for Health Specialties (SCFHS) licensing or dataflow verification; 1-2 years exp; OET/IELTS; NAVTTC/PMDC attested documents; BE&OE registration.
Tourism & Hospitality	Saudi Arabia, UAE,	Chefs, hotel staff, housekeeping supervisors, event coordinators, tour guides, amusement park operators. Red Sea & NEOM creating tens of thousands of roles in luxury/regenerative tourism.	Hospitality diploma or 2+ years exp; basic English/Arabic; food safety & hygiene cert; employer sponsorship; some roles need Saudi Tourism Authority alignment.
Renewable Energy & Green Hydrogen	Saudi Arabia, Kuwait, UAE, Qatar	Technicians, plant operators, electrical/mechanical engineers, safety specialists for green hydrogen & solar plants.	Technical diploma (electrician/welder/mechanical) via NAVTTC; 2-3 years relevant exp; safety certifications (e.g., IOSH/NEBOSH); Language skills
Specialized Construction & Mega-Projects	Saudi Arabia, UAE,	JCB/Bobcat operators, heavy equipment drivers, welders, electricians, site supervisors (skilled trades only).	Heavy machinery/operator license; 2+ years exp; NAVTTC/Gulf-recognized trade certificate; safety training; attested documents; BE&OE verified employer
Oil & Gas / Logistics	Qatar (North Field expansion), Saudi Arabia	Instrument technicians, mechanical technicians, logistics coordinators, truck drivers (certified). Qatar LNG expansion to 142 million tons by 2030.	Technical diploma +3 years exp; Qatar/Saudi driving license for operators; English + basic Arabic; BE&OE + employer sponsorship; health & police clearance.

*Source: Author's compilations based GOP (n.dc.) and Saudi Vision 2030, UAE MoHRE, Qatar Vision 2030, ILO and World Bank labor reports, SCFHS and NAVTTC website.*

The above-cited Gulf-based opportunities require skilled labor along with sufficient training and testing to achieve maximum employability. However, following steps are required to be taken to obtain the maximum workers opportunities;

- i. A close coordination with the Gulf governments to obtain labor quotas for Pakistani workers
- ii. A strong-working relation by Commercial Attaché of Pakistan with the private sector firms of the Gulf linking Pakistani labor and the OEPs

- iii. A digital portal with BEOE monitoring offering end-to end facilitation for searching and applying job opportunities for Pakistani workers
- iv. A responsive complaint addressing system in the Pakistan embassies abroad facilitating the workers

Apart from Gulf labor market, new opportunities for Pakistani workers are also available in the global labor market. Since every global working opportunity require skills and certification, there is a strong need to train and test Pakistani workers to access maximum global labor opportunities. A brief review of global skills-based opportunities is presented here which can be accessed by Pakistani workers by meeting skills, language and other necessary requirements.

*Table 13. Global opportunities for Pakistani Workers*

Sector	Countries	Emerging Opportunities	Key Requirements for Pakistani Workers
Healthcare	Canada, Germany, Italy, Japan, Sweden, Romania	Nurses, caregivers, doctors, lab techs. Italy's MoU: Germany's Opportunity Card: nurses required; Canada's category draws: Japan's MoC: caregivers; Sweden's health workers shortages: Romania	Degree + registration (OET/IELTS 7+); 1–2 years exp; recognition (for Germany/EU, NNAS for Canada); NAVTTC cert; BE&OE registration; proof of funds/health check.
IT & Digital Skills	Canada, Australia, Germany, UK, USA, Singapore	Software devs, data analysts, cybersecurity. Canada's STEM: Australia's SOL: Germany's Blue Card: easy for IT; UK's Skilled Worker; USA's H-1B: Singapore's Employment Pass: 1,000+ fintech.	Bachelor's + 2–5 years exp; assessment (ACS for Australia, USCIS for USA); IELTS/PTE 6–7+; certs (AWS/Google); BE&OE application; job offer/sponsor.
Engineering & Skilled Trades	Australia, Germany, Italy, Denmark, Romania, Poland	Civil/mech engineers, welders, electricians. Italy's MoU: industrial welders; Australia's regional areas require; Denmark's Positive List: shortages; Romania masons/electricians; Poland's seasonal workers	Diploma/degree + 3 years exp; assessment (VETASSESS/Engineers Australia); IELTS; NAVTTC trade cert; Job offer/points (Opportunity Card in Germany); police clearance.
Hospitality & Tourism	Italy, Australia, Japan, Turkey, South Korea	Chefs, hotel staff, guides. Italy's MoU; Australia's rebound: seasonal; Japan's MoC; Turkey's work permits & tourism; South Korea's E-7: service roles.	Diploma or 2 years exp; food safety cert; language (Italian/Japanese N4+, English for others); BE&OE quota/sponsor; health check.
Agriculture & Seasonal Work	Italy, New Zealand, Greece, Poland	Farmhands, harvesters, technicians. Italy's MoU; New Zealand's Essential Skills; Greece's pacts: seasonal; Poland's seasonal permits harvesters.	Minimal exp; health check; basic English; BE&OE/MOFA quota; short-term visa (1–9 months); proof of funds.
Manufacturing & Education	South Korea, Japan, Turkey, Romania	Assembly operators, teachers/ESL instructors. South Korea's EPS MoU: manufacturing/teaching; Japan's MoC: factory; Turkey: education; Romania: technicians	Diploma + 2 years exp; language test (TOPIK for Korea, JLPT for Japan); TEFL for teaching; NAVTTC cert; BE&OE sponsor/contract.

*Source: Author's compilation based on labor market reports and immigration programs of different countries.*

A detailed description of these skills-based opportunities is given in Annexure C with the title and details of programs suitable for Pakistani workers. Here, it is also stressed that to avail these opportunities, there should be dedicated sections in the BEOE or the OEC where technical and language requirements should be communicated to the aspiring workers. Along with this, it is also important to encourage local OEPs to establish links in European, American and Australian employers to obtain skills workers job quotas for Pakistani labor. For this purpose, joint efforts of Pakistani embassies, Ministry of Overseas Pakistanis and OEPs are required.

## PUBLIC POLICY RELEVANCE

- i. **Reforming Regulatory Procedures & Reducing Bureaucratic Delays:** The manpower export system of Pakistan requires reforming regulatory procedures in order to improve the workflow of recruitment processes. The registered OEPs should be ranked or graded based on their performance to enable workers to choose the right body. Along with this, the complete process of foreign job recruitment by the OEPs should be facilitated by reducing unnecessary approvals and integrating workflows.
- ii. **Enhanced Digitalization for Quick Processing:** There is a need to completely adopt the end-to-end digitalization to enhance the manpower export processes. Digitalization will integrate the processes, reduce paperwork, minimize processing time and enable workflow tracking in real time. More specifically, a national manpower export portal should be developed linking workers, OEPs, BEOE, embassies and foreign employers.
- iii. **Strengthening Skills & Pre-Departure Training:** The most important factor enabling workers to access foreign jobs is their skill set. The foreign employers require globally accredited skills with adequate language command. Therefore, it is required to train and test local workers as per international requirements and provide them with pre-departure training on job contracts, output required etc. to improve their working prospects on foreign lands.
- iv. **Improving Worker Support Mechanism:** The Pakistani workers frequently complain regarding the weak support mechanism after their departure from Pakistan. This aspect needs to be carefully taken, and special helplines and dedicated cells should be established with BEOE and the Pakistani embassies abroad to provide legal and technical support to the workers. Along with this, regular monitoring of complaints should be done to identify trouble-making foreign employers.
- v. **Reducing Recruitment Costs and Promote Transparent Migration:** Within Pakistan, the highest financial burden for accessing foreign jobs is borne by the workers. The OEPs typically monetize their offered opportunities and charge workers for foreign jobs. Along with this, the regulatory body also adds fees thereby inflating the costs of accessing foreign jobs. The regulatory body should play a pro-active role in monitoring the so-called “sale of foreign jobs” by OEPs and develop a transparent mechanism to ensure level playing fields for the skilled workers.

## **CONCLUSION**

This study was designed to help policy makers to enhance their understanding of present manpower export patterns in Pakistan with respect to the issues and challenges in the manpower export system of Pakistan. To achieve this objective, the existing trends of manpower exports from Pakistan were studied and the role of recruitment agencies dealing with the manpower exports from Pakistan were analyzed through responses from a sample OEPs. The results indicated a comprehensive need for administrative and operational reforms in manpower export system of Pakistan. Supplementing this, we have also examined the role of regulatory body and the skills testing system in Pakistan with a view to highlight the areas where improvement can be made to enhance the manpower exports from Pakistan. Along with this, this study also examined the various opportunities emerging in the global system for the skilled labor of Pakistan. The overall output of this study is in the form of a set of recommendations for the policy makers to reflect on the challenges in current manpower export practices and to grasp the working models for accessing the opportunities in the global labor market for Pakistani youth.

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## ANNEXES

### Annexure A: Questionnaire for Data Collection from Overseas Employment Promoters (OEPs) (Rawalpindi Protectorate)

Section	Questions
A. Respondent & Firm Profile	<p>Q1 — OEP name: _____</p> <p>Q2 — Year established: ____</p> <p>Q3 — Total staff in office: ____</p> <p>Q4— Approx. workers deployed (2024) : ____</p> <p>Q5 — Main destinations (select up to 2):            (i) Saudi (ii) UAE (iii) Qatar (iv) Oman (v) Bahrain (vi) Malaysia (vii) Kuwait (viii) Other — specify:</p> <p>Q6 — Main occupations recruited (select up to 2):            (i) Construction (ii) Drivers (iii) Domestic (iv) Health/Nurses (v) IT/Engineering (vi) Other — specify</p>
B. Recruitment & Contracts	<p>Q7— Primary worker sourcing channel:            (i) Walk-in / direct (ii) Sub-agents (iii) Online applications (iv) Mixed (Single)</p> <p>Q8 — How do you usually secure foreign contracts?            (i) Direct with employers (ii) Long-term partners (iii) Networks/intermediaries (iv) Govt/G2G facilitation (v) Other —</p> <p>Q9 — Average time from vacancy to deployment (weeks): ____</p>
C. Costs & Compliance	<p>Q10 — Average total recruitment cost per worker (PKR): ____</p> <p>Q12 — Average amount charged to worker (PKR): ____ (Number)</p> <p>Q13 — Share of cost borne by employer: (i) None (ii) &lt;50% (iii) About half (≈50%) (iv) 50–90% (v) 100% (Single)</p> <p>Q14 — Main compliance cost drivers (select up to 2):            (i) Welfare fund (ii) Insurance (iii) Protector fees (iv) Medical tests (v) Embassy attestation (vi) Other — specify __ (Multiple)</p>
D. Challenges & Skills Match	<p>Q15 — Top challenges in recruitment (select up to 2):            (i) Visa delays (ii) Irregular brokers (iii) Lack of skilled candidates (iv) Documentation burden (v) Employer price pressure (vi) Payment delays (vii) Other —</p> <p>Q16 — How well do candidates' skills match employer requirements?            (i) Very well (ii) Well (iii) Moderate (iv) Poorly (v) Very poorly</p> <p>Q17 — Most frequent skills gaps (select up to 2): (i) Technical (ii) Language (iii) Soft skills (iv) Safety / compliance (v) IT / Digital (vi) Other — specify</p> <p>Q18 — Do you provide/arrange pre-departure or skills training?            (i) Yes, regularly (ii) Yes, occasionally (iii) No (Single)</p>
E. Relationships & Irregular Channels	<p>Q19 — Impact of unlicensed brokers on your business:            (i) None (ii) Small (iii) Moderate (iv) High (v) Very high</p> <p>Q20 — Have you lost contracts due to processing/documentation delays? (i) Yes (ii) No</p> <p>Q21 — Do foreign employers compare Pakistan unfavourably to competitor countries?            (i) Yes, often (ii) Sometimes (iii) Rarely/Never</p>
F. After-Recruitment Support	<p>Q22 — Do you provide support to workers after they depart?            (i) Yes, regularly (ii) Yes, occasionally (iii) No</p> <p>Q23 — What type of after-recruitment support do you provide? (select up to 2):            (i) Complaint handling (ii) Contact with employer (iii) Remittance facilitation (iv) Repatriation support (v) Counseling/family support (vi) Other — specify</p> <p>Q24 — How often do workers contact your agency after departure? (i) Frequently (ii) Occasionally (iii) Rarely (iv) Never (Single)</p>
G. Foreign Employers' Aspects	<p>Q25 — How satisfied are foreign employers with Pakistani workers? (i) Very satisfied (ii) Satisfied (iii) Neutral (iv) Dissatisfied (v) Very dissatisfied</p>

	<p>Q26 — What do employers value most? (select up to 2): (i) Technical skills (ii) Low cost (iii) Hard work (iv) Loyalty (v) Cultural / religious compatibility (vi) Other —</p> <p>Q27 — Main complaints from employers about Pakistani workers (select up to 2): (i) Skills mismatch (ii) Language issues (iii) Absenteeism / discipline (iv) High attrition (v) Low productivity (vi) Other — specify</p> <p>Q28 — Do employers show preference for workers from other countries over Pakistan? (i) Yes, often (ii) Sometimes (iii) Rarely / Never</p>
H. Workers' Aspects	<p>Q29 — What motivates most workers to seek overseas employment through your agency? (i) Higher income (ii) Lack of local jobs (iii) Better career opportunities (iv) Family / social pressure (v) Other — specify</p> <p>Q30 — What challenges do workers face before departure? (i) High upfront fees (ii) Document preparation (iii) Skills training (iv) Medical / Protector clearance (v) Delays (vi) Other — specify _ (Multiple)</p> <p>Q31 — What challenges do workers report after reaching host country? (select up to 2): (i) Salary deductions (ii) Harsh working conditions (iii) Accommodation / food (iv) Employer abuse (v) Contract substitution (vi) Other — specify</p> <p>Q32 — How prepared are workers for cultural and workplace adaptation abroad? (i) Very prepared (ii) Prepared (iii) Somewhat prepared (iv) Not well prepared (v) Not prepared at all</p>
Open Ended Questions from all Sections/Themes Discussed Above (A to H)	<ol style="list-style-type: none"> <li>i. How do you manage and supervise sub-agents? Do you have written agreements?</li> <li>ii. How do you establish and maintain contracts with foreign employers?</li> <li>iii. How do you respond to pressure from workers or employers about fee levels? Any informal payments or side-deals?</li> <li>iv. Describe your interactions with BEOE/Protectorate offices. Which processes are smooth, which are cumbersome?</li> <li>v. How well do applicants meet employer technical and behavioral expectations? Provide examples.</li> <li>vi. Describe the support you offer after the worker departs (complaints, employer liaison, repatriation). Give a recent case.</li> <li>vii. Which destinations/sectors are growing or shrinking? Any new markets you are targeting?</li> <li>viii. If you could change three things about the system (regulation, financing, training), what would they be?</li> </ol>

## Annexure B: Regulatory Framework for Manpower Exports in Pakistan

The export of manpower is regulated through Emigration Ordinance 1979 and the Emigration Rules 1979. Both regulatory tools are applied to ensure the smooth working of the manpower export system in Pakistan. A quick summary of both regulatory the existing regulatory framework dealing with the manpower exports is summarized below;

*Table 14. Emigration Ordinance 1979: Summary of Key Provisions*

Section No.	Chapters/Provisions
	<b>Chapter II - Director General and Protector of Emigrants</b>
<b>Section 4</b>	This section empowers the Federal Government to appoint a Director General, Bureau of Emigration and Overseas Employment (BEOE), who is responsible for regulating and controlling emigration.
<b>Section 5</b>	This section provides for the appointment of Protectors of Emigrants, who ensure compliance with laws, oversee emigrant registration, and verify contracts before departure.
<b>Section 6</b>	This section authorizes the Government to appoint Labour Attachés abroad to safeguard the rights and welfare of Pakistani emigrants.
	<b>Chapter III - Emigration</b>

<b>Section 8</b>	This section declares that emigration is lawful only if carried out through recognized channels, such as foreign employment contracts, work visas, OEP selection, or government-to-government arrangements.
<b>Section 9</b>	This section allows the Federal Government to prohibit or regulate emigration for specific professions or to particular countries if such action is in the public interest.
<b>Chapter IV – General Provisions</b>	
<b>Section 11</b>	This section prohibits recruitment advertisements without the prior approval of the Director General or the Protector of Emigrants.
<b>Section 12</b>	This section authorizes the Government to constitute an Advisory Committee on emigration matters.
<b>Section 13</b>	This section grants the Director General or Protector powers similar to those of customs officers, including the authority to search or detain vessels to prevent unlawful emigration.
<b>Chapter V – Overseas Employment Promoters (OEPs)</b>	
<b>Section 16</b>	This section requires OEPs to obtain a licence from the Government, subject to conditions, fees, and a security deposit.
<b>Section 17</b>	This section provides that licences may be suspended, cancelled, or withdrawn if an OEP commits misconduct or violates the Ordinance.
<b>Section 18</b>	This section empowers the Federal Government to abolish private OEP licensing and transfer recruitment functions to the state-owned Overseas Employment Corporation (OEC) or another designated body.
<b>Section 19</b>	This section requires that emigrants must appear before the Protector of Emigrants for registration and verification before departure.
<b>Chapter VI – Rules</b>	
<b>Section 22</b>	This section authorizes the Federal Government to make rules regarding the licensing and supervision of OEPs.
<b>Section 23</b>	This section allows rules to be framed for emigrant training, orientation, welfare funds, repatriation, and regulation of fees and charges.
<b>Section 24</b>	This section empowers the Government to establish codes of conduct for OEPs and regulate associations of promoters.
<b>Chapter VII – Offences and Penalties</b>	
<b>Section 25</b>	This section prescribes up to five years’ imprisonment for unlawful emigration and up to seven years for repeat offences.
<b>Section 26</b>	This section imposes penalties of up to fourteen years’ imprisonment for fraudulent inducement to emigrate, forgery of documents, or illegal recruitment fees.
<b>Section 27</b>	This section prescribes up to five years’ imprisonment for making false representations as a government official.

*Source: Author’s compilations.*

*Table 15. Emigration Rules 1979: Summary of Key Rules*

<b>Rule No.</b>	<b>Description of Key Rules</b>
<b>Roles and Responsibilities</b>	
<b>4</b>	Powers and Duties of Director General: The Director General oversees emigration policies, manages the Bureau, advises the Prime Minister, liaises with Pakistani Missions, and maintains IT-based migration data.
<b>5</b>	Powers and Duties of Protector of Emigrants: The Protector processes private sector demands, ensures emigrants understand agreements, inspects conveyances, investigates emigrant treatment, and supervises promoters.
<b>6</b>	Powers and Duties of Labour Attaché: The Labour Attaché promotes overseas employment, ensures emigrant welfare, resolves disputes, attests manpower demands, and reports labor market trends.
<b>7</b>	Functions of the Advisory Committee: The Advisory Committee advises the Federal Government on emigration policies, codes of conduct, and system improvements.
<b>Licensing and Regulation</b>	

8	Application for Grant of Licence: Licence applications are submitted to the Secretary through the Director General with a character certificate and non-refundable fees (50,000 PKR for sole proprietors, 100,000 PKR for companies).
14	Unauthorized Persons Not to Assist in Emigration: Only licensed individuals or exempted entities can assist with emigration for employment purposes.
15	Code of Conduct for Overseas Employment Promoters: Promoters must follow ethical and operational guidelines to ensure fair treatment of emigrants.
<b>Financial and Administrative Processes</b>	
16	Service Charges, Their Distribution: Emigrants pay 15,000 PKR (or 6,000 PKR for direct employment visa endorsement), refundable if employment is not secured, with payments processed through banks.
17	Other Charges: Promoters can charge actual expenses for air tickets, medical, visas, etc., refundable if employment fails, unless the emigrant refuses to proceed.
<b>Demand and Recruitment Processes</b>	
21	Demand of Manpower from Foreign Government: The Corporation handles foreign government manpower demands, ensuring compliance with national needs and specific approvals for technical jobs.
22	Overseas Employment Promoter to Process Foreign Government's Demand: Promoters require Protector of Emigrants' permission to process foreign government demands after scrutiny.
23	Scrutiny of Private Sector Demands: The Protector scrutinizes private sector demands, ensuring proper documentation and reasonable terms, with disputes referred to the Director General for final decision within three days.
<b>Agreements and Registration</b>	
27	Registration of the Agreement: The Protector registers foreign service agreements after verifying qualifications, explaining terms, and ensuring voluntary consent, with details recorded on passports.
28	Registration of Emigration Visa Holder: Emigration visa holders must submit intimation letters, undertakings, and prescribed fees, and be insured, for registration by the Protector.
29	Direct Employment: Individuals securing foreign employment through personal efforts must register agreements and comply with fee and insurance requirements.
<b>Complaints and Appeals</b>	
30	Appeal: Appeals against orders by the Director General or delegated officers are filed with the Secretary within 30 days for 5,000 PKR.
31	Review: Review petitions against the Secretary's decisions are filed within 30 days for 5,000 PKR, with the Director General able to seek review of appeal orders.

*Source: Author's compilations.*

The summary of Emigration ordinance 1979 and Emigration Rules 1979 described above provides a snapshot of the regulatory framework for the manpower export system in Pakistan. These regulatory provisions were developed to provide a safe, reliable and secure method for Pakistani workers to move abroad.

### Annexure C:

*Table 16. Visa Programs for Non-Gulf Labor Market Opportunities*

Program Name	Country	Targeted Sectors	Key Details for Pakistani Workers
Express Entry (Federal Skilled Worker Program)	Canada	Healthcare (nurses, doctors), IT (developers, analysts), Engineering (civil/mechanical), Trades (carpenters, electricians)	Points-based (CRS score ~470+); category draws for STEM/healthcare. No job offer needed initially; transition to PR. Popular for South Asians
Skilled Migration Program	Australia	IT (software devs, cybersecurity), Healthcare (nurses, aged care), Construction (engineers, electricians), Mining	Points-tested via Skill Select; occupation lists updated Jan 2026 with 50+ new roles. Employer sponsorship optional; skills assessment required (e.g., VETASSESS).

(Subclass 189/190 Visas)			
Skilled Worker Visa	United Kingdom	Healthcare (NHS roles), IT/Finance (analysts, devs), Hospitality/Education (teachers)	Job offer + CoS from sponsor; min salary £38,700 (2026 threshold). Unlimited spots; English test (IELTS). Pathways to settlement after 5 years.
Skilled Immigration Act (EU Blue Card / Opportunity Card)	Germany	Healthcare (nurses, caregivers), Engineering/Manufacturing (welders, machinists), IT (data specialists)	EU Blue Card for high-earners (€45,934 min salary); Opportunity Card for job seekers (no offer needed, points-based). Bilateral healthcare pilot for Pakistanis.
Decreto Flussi (Bilateral Labor Quota)	Italy	Shipbreaking/Welding, Healthcare (assistants), Agriculture (harvesters), Hospitality	Pakistan-specific quota via 2025 agreement; semi-skilled focus. Register via Pakistan's MOFA for "Click Days" applications.
Specified Skilled Worker (SSW) Program	Japan	Nursing/Caregiving, Construction (supervisors), Manufacturing (assembly), Hospitality	Skills/language tests required (exams Jan/Dec 2026); MoC with Pakistan for job matching. New 2027 system replaces training program.
Accredited Employer Work Visa (AEWV)	New Zealand	Healthcare (support workers), IT (network admins), Agriculture (mechanics), Construction	Employer-sponsored; skills verification. Streamlined for shortages; working holiday option for under-30s.
Employment Pass	Malaysia	Construction (site supervisors), Manufacturing (technicians), Services (IT support)	Job offer-based; proximity/cultural ties ease entry. Renewable up to 5 years.
E-7 Visa (Skilled Professional)	South Korea	Technology/Teaching (English instructors), Manufacturing (operators), Research	Contract-based; high wages (~KRW 3M/month). Pathways to F-2 residency/PR.
Work Permit (Turquoise Card for High-Skilled)	Turkey	Tourism and Hospitality (chefs, guides), IT/Engineering, Education	Employer-sponsored; fast-track for skilled. Growing ties with Pakistan.
H-1B Visa	USA	IT (software devs, analysts), Engineering, Healthcare, Finance	Employer-sponsored for specialty occupations; lottery-based selection. Pakistanis in tech/engineering succeed with US degrees or certs (e.g., PMP).
Critical Skills Employment Permit	Ireland	Tech/Pharma (software engineers, biotech specialists), Healthcare, Engineering	Fast-track for in-demand jobs; min €38,000 salary. Leads to Stamp 4 (unrestricted work) after 2 years. English proficiency (IELTS) aids Pakistanis; family reunification easy.
Work & Residence Authorization	Spain	IT/Engineering, Healthcare, Digital Services	Employer-sponsored or self-employment; simplified for skilled pros with job offers. Digital Nomad variant for remote IT roles (min €2,646/month). Strong family benefits; pathways to PR after 5 years.
Skilled Job Seeker Visa (Art. 57-A)	Portugal	Tech (developers, data scientists), Engineering, Healthcare	New 2025 program for highly qualified (bachelor's+); enter for 120-180 days to job hunt without offer. From 50+ countries including Pakistan; convert to work visa on employment.
Highly Skilled Migrant Program	Netherlands	Tech/Finance (AI specialists, fintech devs), Engineering, Professional Services	Recognized employer sponsor required; updated salary thresholds (€5,942/month for 30+, €4,357 under 30). Fast PR pathway after 5

			years; dependents allowed. Pakistanis in IT often qualify via EU ties.
Employment Pass	Singapore	IT/Tech (cybersecurity, devs), Engineering, Finance	For professionals/managers; min SGD 5,600 salary (benchmark to top 1/3 locals). Employer files; COMPASS points system favors skilled applicants. Proximity to Pakistan eases travel; renewable up to 3 years.
Positive List Scheme	Denmark	IT/Engineering (civil engineers, programmers), Healthcare, Trades	Job offer from shortage list; meets Danish salary norms. Points optional for higher ed. English sufficient; family joins after 3 months. Targets global talent like Pakistani engineers.
Employment Residence Permit	Sweden	Healthcare (nurses, doctors), Education, Tech/Trades	Job offer with min SEK 29,680/month salary per collective agreements. Fast-track for shortages; PR after 4 years. Bilingual (English/Swedish) boosts chances for Pakistanis.
Skilled Worker Residence Permit	Norway	Civil Engineering/ICT (advisors, developers), Teaching	Job offer with min NOK 522,600/year salary. Exemptions for local norms; family reunification immediate. High wages attract Pakistani IT pros; English widely used.

*Source: Author's compilations.*