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GULF LABOUR MARKETS AND PAKISTANI WORKERS: STRUCTURAL DEPENDENCE, POST-COVID RECOVERY, AND DIVERSIFICATION CHALLENGES

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Abstract
Labour migration system is structurally bound to the Gulf Cooperation Council (GCC) states in Pakistan. In 2019-2023, the number of those registered by the Bureau of Emigration and Overseas Employment (BEOE) emigrated to the Gulf destinations, 50 to 62 per cent of which (50 per cent in 2021) went to Saudi Arabia in each year. This dependency on each other was tested to the core during COVID-19. The annual emigration dropped from 625,876 in 2019 to 225,213 in 2020, a decrease of 64 percent, due to closures, air travel restrictions and reduced employment opportunities by destinations along the Gulf. According to the estimates 304,000 Pakistani nationals returned via government-arranged flights. The paper relied exclusively on the available data from Pakistan Migration Reports 2020 and 2024. Gulf dependence is maintained through five mutually reinforcing structural features: dominance of low-skilled categories, bilateral recruitment infrastructure, culture of migration in source districts, remittance dependency of the macroeconomy of Pakistan, and the absence of formal diversification governance. The post-COVID recovery was rapid: 832,339 emigrants in 2022 and 862,625 in 2023, largely attributable to the return of the demand for emigrants from the Persian Gulf. This study suggests that the dependence has increased as a result of post-COVID recovery efforts. However, it is not enough to have new bilateral agreements, it is also necessary to have a structural change in the skill mix of Pakistani emigration; something which no government has managed to achieve over a political term.

1. INTRODUCTION

Pakistan is among those countries that are huge producers of labour force. The Bureau of Emigration and Overseas Employment (BEOE) has been keeping track of the number of registered emigrants that have been exported since 1971. As of 2023, the number had risen to nine million. Roughly, the almost all went to a region under the name of Gulf Cooperation Council (GCC) states namely Saudi Arabia, United Arab Emirates (UAE), Qatar, Oman, Bahrain and Kuwait (Shah, Shahzad, Quddus, & Qazi, 2024). This concentration is no accident. It is a structural relationship developed over the past fifty years of bilateral labour pacts, infrastructure for recruitment, migrant networks and remittance channels that have become entrenched in the political economy of Pakistan as well as the economies of their origin countries. 95 per cent of all the BEOE registered emigrants were forwarded to the Gulf destinations in 2019. It was about 90-95 percent in 2022 and 2023 following the disruption due to COVID-19. While ten years of official talk of destination diversification, Pakistan's reliance on the Gulf remains little different.

This system had the heaviest test of its history with COVID-19. During a single year of the pandemic, annual emigration was cut in half, or by 64 per cent. Gulf host countries implemented lockdowns and closed down construction and service industry, and lowered foreign worker demand. It is estimated that 304,000 migrants from Pakistan were brought back. Things seemed to be falling apart. It did not break. After reopening, Pakistani emigration increased to their highest levels since then; at 832,339 in 2022 and 862,625 in 2023 (Shah et al, 2024). The post-COVID recovery was a new way of doing things. It was a revival of the pre-COVID structure and the same dominant destinations, the same predominant occupational categories, the same source districts.

The migration flows have been revived from Pakistan following the COVID-19 pandemic, but there has been no change in the structural gaps in the country's labour migration system. While labour exports have grown, the migration is largely concentrated in the provision of low and semi-skilled jobs to the Gulf economies, thus limiting the possibilities for a sustainable human capital development and economic diversification. However, the post-pandemic revival is not a qualitative change as Pakistan is still following traditional methods of sending workers abroad, rather than promoting high-skilled international migration, as argued by Ashraf (2022a). There is also a skewed distribution of skilled migration opportunities, with advanced destinations like the United States and the United Kingdom still being able to draw only a small number but highly-qualified group of Pakistani skilled professionals, which is leading to a selective brain drain without significantly alleviating the reliance on skilled migration from the Gulf labor markets (Ashraf, 2022b). In addition, there is considerable gender imbalance in the migration system in Pakistan. Social norms, institutional barriers and occupational segregation persist in limiting the participation of women in international labour mobility and are contributing to the failure to realize the full potential of women's skills in migration, and the lack of women's representation in the design and implementation of overseas employment policies (Ashraf, 2022c). As a whole these studies suggest that the labor migration in Pakistan is influenced not just by the external demand for labor but also by structural constraints within the country that limit labour's diversification by destination, skill set and gender. The ongoing reliance on the Gulf markets and sustainability of migration bounce back post-COVID is a relevant backdrop for these problems. All data come from Shah et al. (2020) and Shah et al. (2024). Theoretical references are all from the reference documents that have been uploaded. There is no reference to external sources. The paper discusses the following: In section 2, the theoretical framework is developed. The data and method are described in section 3. The structural architecture of the Gulf dependence is described in Section 4. Section 5 examines the COVID-19 disruption and response to a post-COVID recovery. Section 6 looks at challenges to diversification. A policy framework is proposed in Section 7. Section 8 concludes.

1.1 Research Questions

1. What are the structural features that sustain Pakistan's Gulf labour dependence across political cycles and external shocks?
2. How did COVID-19 disrupt and then reinforce this system and what does the disruption reveal about its vulnerabilities?
3. What obstacles prevent Pakistan from meaningfully diversifying its emigration destinations?

2. THEORETICAL FRAMEWORK

2.1 The Push-Pull Architecture of Low-Skilled Migration

The push-pull framework is a basic lens of analysis for international migration (Murru 2009). Push factors are factors in the countries of origin that encourage people to leave their countries: they include unemployment, low pay, inflation, and few career opportunities and poor governance. It is in the destination countries where pull factors appeal to migrants, such as better wages, job demand, and formal recruitment systems. Both types of factors have remained strong on the Pakistan's Gulf migration in the period 2008-2025.

Murru (2009) pointed out that the push-pull dynamics have been accelerated by globalization as the "push" factors of the destination become increasingly visible to potential migrants through the media and diaspora networks. This is manifest in the culture of migration in Pakistan. In some districts such as Sialkot, Dera Ghazi Khan, Swat and Lower Dir, the migration networks are so dense that international labour migration has become a normal life trajectory and not an exception. After establishing a migration culture, the culture reinforces itself – migrants share information, find other migrants and provide financial support (Shah et al., 2024).

Duncan (2009) demonstrated that developed countries' selection processes for immigration are significant contributors to the flow of skilled immigration. The opposite holds true for low-skilled migration, too: the demand for workers in the construction sector for the Gulf states invites skilled migration, such as the recruitment of construction workers through agencies, bilateral labour contracts, and standardization of visa categories, to bring in specific types of workers from specific sources. This is because Pakistan's status as a major supplier of labour to the Gulf is not only due to push factors but also because there are specific pull factors in the destination countries that are designed according to the nature of specific occupations that Pakistan's labour supply.

2.2 Structural Dependence in Labour-Exporting States

Some migration links are more permanent than others. Others are transactional: migrants and destinations link up via marketization, and when factors shift, they are able to re-engage with different partners. Others are structurally embedded, that is, the migration relationship gets embedded in the institutional structures, economic infrastructure and social organization of both sending and receiving societies.

Pakistan's relationship with the Gulf countries is of the latter kind. Fifty years of bilateral agreements, the structure of recruitment agencies, remittance banking systems, diaspora community networks and government policies focused on emigration as an economic development strategy have established a structural dependence that would entail no less than the reconstruction of an entire institutional ecosystem in order to change the nature of migration flows.

Ryazantsev et al. (2020) illustrated how structural dependence works in the CIS context, during the COVID-19 crisis when labour migration between the CIS countries was disrupted, as this disruption was not only economic, but also social and institutional. Migrants have not only experienced the loss of their livelihoods, but of their homes, legal status, health services, and social networks. It was aggravated by the lack of an international response. Pakistan's dependence on the Gulf is also structured – lost remittances were only part of the problem when migration from the Gulf was halted in 2020, affecting the livelihoods of migrants and those who relied on them.

This depth has been reported by Salik (2020) for Pakistan during its COVID-19 experience, indicating that Pakistan was very much depending on the remittance income of migrants from the Gulf countries and any disruption of migration flows. The lack of alternative sources of income for the migrants and their families showed how interwoven the dependency of the Gulf labour is in the poverty management in Pakistan as well as in its macroeconomic management.

2.3 COVID-19 as a Structural Stress Test

The COVID-19 crisis was an unprecedented strain on global migration systems. Meer and Villegas (2020) reported on the individual states and regional blocks which implemented travel bans that effectively halted cross-border travel. Borders were closed and lockdowns were enforced across North America to Europe, throwing migration routines that had been in place for many years into disarray.

During the pandemic migrant workers were among the most vulnerable, as De Lange, Mantu and Minderhoud (2020) demonstrated. Many were in fragile legal situations, in situations of lack of social protection and in need of their employers for housing and income. The closure of business in the Gulf nations meant that Pakistani workers lost their jobs, homes and legal status at the same time. According to International Labour Organization, there were 164 million migrant workers around the world. A large part of the working population in Pakistan was vulnerable to working in the Gulf labour markets.

Içduygu (2020) studied the specific challenge of repatriation amidst the pandemic, which was both losing out on foreign income and the danger of being infected while lacking access to health care. For Pakistani labourers working abroad in the gulf, this was a critical situation. The government facilitated some 500 repatriation flights and returned some 304,000 workers (Shah et al., 2024). Repatriation, however, was not a long-term solution, but a crisis management tool. With the reopening of the Gulf economies the structure of the economy remained the same and the workers came back.

Muhammad (2021) empirically showed that COVID-19 severely affected the relationship between migration, remittance, and growth of the economy in the case of Pakistan resulting in negative impacts on the GDP, which exacerbated push factors for emigration. The pandemic has not weakened the reliance of the Gulf. It showed up that there is inbuilt strength in the structural relationship between the Pakistani market and the labour markets of the gulf countries and it could not be changed by any major disruption in the system.

3. DATA AND METHOD

3.1 Data Sources

This paper uses only 2 data sources. First, the Pakistan Migration Report 2024 (Shah, Shahzad, Quddus, & Qazi, 2024) which offers BEOE annual emigration statistics by destination country, province of origin, district of origin, skill category and occupation, for the period 2019-2023. It also offers State Bank of Pakistan bilateral remittance details for the period of FY2019FY2024 and contextualizes the brain drain debate, remittance trends and irregular migration. Second, the Pakistan Migration Report 2020 (Shah, Amjad, Hameed, & Shahzad, 2020) which offers historical migration data since 2008-2019 and governance context.These two reports are the sole source of data for the quantitative data in this paper. There are no external datasets added. This constraint makes sure that all empirical claims are preferable to the official migration figures in Pakistan, generated by CIMRAD at Lahore School of Economics.

3.2 Analytical Approach

The paper is based on a descriptive-analytical approach at three analytical layers. Firstly, the structure of Gulf dependence is documented based on BEOE destination, occupational, and provincial data from 2019-2023. Second, the impact of the COVID-19 disruption is examined using the emigration collapse that occurred in 2020 – 2021 and the subsequent rebound in 2022 – 2023, highlighting what has changed and what hasn't changed. Third, diversification barriers are detected by the fact that structural characteristics – skill composition, source district concentration, bilateral agreement coverage – persist that limit destination flexibility.

4. THE STRUCTURAL ARCHITECTURE OF PAKISTAN'S GULF LABOUR DEPENDENCE

4.1 Five Decades of Gulf Concentration

The trend of labour migration from Pakistan to the GCC countries started in the early 1970s when oil revenues windfalls in the GCC economies led to the demand for construction workers, drivers, domestic helpers, etc. in these economies. In the period of 1971 to 2010, approximately 2.74 million Pakistani workers have migrated to Saudi Arabia alone (Shah et al., 2024). The contribution of the Gulf countries to the overall Pakistani emigration in all the available years of BEOE has been more than 85 per cent. The distribution by the destination for 2019-2023 is shown in Table 1.

Table 1 *Top Destinations of Pakistani Labour Migrants, 2019–2023 (% of Annual Total)*

Destination	2019	2020	2021	2022	2023
Saudi Arabia	53.2%	60.6%	54.0%	61.9%	49.5%
UAE	33.8%	23.8%	9.5%	15.4%	26.7%
Qatar	3.1%	3.3%	13.2%	9.9%	6.4%
Oman	4.5%	4.6%	13.3%	7.0%	7.0%
Bahrain	1.3%	3.5%	4.5%	1.6%	1.5%
Malaysia	1.8%	1.0%	<1%	0.7%	2.4%
United Kingdom	0.1%	0.4%	0.4%	0.4%	1.9%
Others (incl. USA)	2.2%	2.8%	4.9%	3.1%	4.6%
Gulf total (approx.)	95.9%	95.8%	90.5%	95.8%	91.1%

Source: Shah et al. (2024, Table 1.1). Kuwait is not in the top-ten destinations in any year; it has imposed a virtual ban on new Pakistani immigration since approximately 2010 (Shah et al., 2024).

Three aspects of Table 1 are of analytic significance. Firstly, the share price in the Gulf has not dropped. In 2019, it was around 96 percent, and in 2023, around 91 percent, which is the most diversified year in the table, and still very Gulf-centered. Secondly, Saudi Arabia dominates the Gulf. The proportions of the shares were 49.5 percent to 61.9 percent over the 5 years. In all the years of the study period, Saudi Arabia was the host of at least 50% of the Pakistani emigrants. Third, the UAE demonstrated the greatest fluctuations, dropping from 33.8 percent in 2019 to 9.5 percent in 2021 (the COVID year when there were significant restrictions on the entry of new workers into the UAE as per host country policies), up to 26.7 percent in 2023.

4.2 The Occupational Structure: Why Gulf Demand and Pakistani Supply Match

Geography and history alone are not the reason for Pakistan's Gulf dependence. It symbolizes a structural match between the demand of the Gulf labour markets and supply of the emigration system in Pakistan. The industry sectors in the Gulf that are in demand for low cost, low skill manual labor are the construction, hospitality, transport and domestic service industries. The system of emigration in Pakistan is well structured and dominated by unskilled and semi-skilled workers to cater to this demand. Table 2 presents the skills profile of Pakistani emigrants in 2019-2023.

Table 2 *Pakistani Emigrants by Skill Level, 2019–2023 (% and N)*

Skill Category	2019	2020	2021	2022	2023
Highly qualified + skilled (%)	4.1%	3.9%	4.8%	4.7%	8.0%
Skilled (%)	45.8%	46.2%	45.5%	41.7%	36.5%
Unskilled + semi-skilled (%)	50.1%	49.9%	49.7%	53.6%	55.5%

Skill Category	2019	2020	2021	2022	2023
General labourers (% of total)	39%	42%	40%	43%	45%
Drivers (% of total)	29%	34%	31%	28%	23%
Total registered emigrants (N)	625,876	225,213	288,280	832,339	862,625

Source: Shah et al. (2024, Figures 1.2, 1.3, 1.4). Percentages may not sum to 100 due to rounding in source data.

The occupational distribution remains fairly constant in all 5 years. The total outflows in this group is characterized by a significant proportion of general labourers and drivers, 62-68 per cent of the group across the period. Other manual workers such as construction workers, electricians and masons also contribute to the manual worker concentration. The most relevant group for destination diversification into professional labour market in the West are highly qualified and skilled workers, who represented 4.1 per cent in 2019, and were not significantly different until they grew to 8 per cent in 2023.

This is no coincidence and it is a skill distribution. It is reflective of the education and training system of Pakistan, the domestic labour market, and the orientation of migration governance system in Pakistan. Skilled immigration was found to be a policy goal of developed countries by Duncan (2009). Gulf States' labour recruitment mechanisms are created to recruit exactly the opposite: lots of low paid manual workers. The structure of Pakistan's emigration system is not geared towards the former but towards the latter. To change this alignment, not only new bilateral agreements but the entire identity of the skill mix of the emigrants of Pakistan would have to change, a process which would take decades and would not have been systematically attempted.

4.3 Source Districts: The Geography of Gulf Dependence

Not all Pakistanis migrate to the Gulf are equal. Geographically, it is localized in the specific districts, which have deep migration culture. Top sources districts of 2019-2023 are given in Table 3.

Table 3 *Top Ten Source Districts of Pakistani Labour Migrants, 2019–2023 (% of Annual Total)*

District	2019	2020	2021	2022	2023
Sialkot	4.0%	4.7%	5.1%	5.0%	4.2%
Swat	4.1%	4.4%	3.9%	3.9%	2.9%
Lower Dir	4.1%	3.7%	2.9%	3.0%	2.3%
Dera Ghazi Khan	3.4%	3.8%	4.7%	4.3%	4.0%
Gujranwala	3.2%	3.6%	3.6%	3.8%	3.6%
Lahore	2.5%	2.8%	2.8%	2.7%	3.9%
Faisalabad	2.4%	2.8%	2.8%	3.0%	3.3%
Rawalpindi	2.1%	2.8%	3.2%	2.8%	3.4%
Mardan	2.4%	2.8%	2.4%	2.5%	2.3%
Upper Dir / Gujrat	2.3%	2.4%	1.7%	2.4%	2.2%

District	2019	2020	2021	2022	2023
Top-10 combined	30.5%	33.8%	33.1%	33.4%	31.9%

Source: Shah et al. (2024, Table 1.2). No single district exceeded 5.1% of total migrants in any year. Approximately two-thirds of all migrants come from outside the top-10 districts.

There are two significant trends in the source district data. Firstly, the same districts are seen in the top ten in all five years. Sialkot, Dera Ghazi Khan, Swat, Gujranwala and Rawalpindi always appear. The geographic stability of this indicates that embedded migration cultures exist — communities where the migration of labour is a common pathway of life, where there are high rates of recruitment, and where the success of migrants who return home offers models for aspirational communities. It is the very self-reinforcing aspect of migration cultures which Murru (2009) has pinpointed as a crucial structural aspect of stable migration systems.

Secondly, the provincial distribution is also relatively stable. In 2019, 50.0 per cent of all migrants came from Punjab, while 56.7 per cent of migrants in 2023 were from Punjab, reflecting its general proportionality with respect to its share of the overall population. In 2019 and 2023, Khyber Pakhtunkhwa (KPK) accounted for 29.8% and 24.4% of the migration share, respectively, which corresponds to almost double its population share due to KPK's strong migration culture (Shah et al., 2024).

4.4 Remittance Dependence: The Macroeconomic Lock-In

The macroeconomic dimension to Pakistan's Gulf dependency underpins the structural dimension. The remittance inflows of Pakistan hit a new high of USD 31.28 billion in FY2021-22. Overall, Saudi Arabia, UAE and other GCC countries combined and Kuwait alone accounted for about 55-65 percent of flows for FY2019-FY2023 (Shah et al., 2024). This remittance-dependence has an adverse impact on the macroeconomies of countries as any disruption in migration from the Gulf would directly impact foreign exchange pressures, household consumption in the source countries and fiscal pressures on Pakistan's still trade deficit macroeconomy.

Salik (2020) rightly pointed out that Pakistan's remittance-driven foreign exchange requirements exposed it to macroeconomic risks in the event of a drop in remittances due to the COVID-19 pandemic. The government's response, which is double-sided; to send workers home, and yet at the same time to continue to manage remittance inflows, is an example of the impossible situation that arises when the Gulf is dependent in time of bad news. Pakistan's GDP growth has been found to have a long-term positive relationship with foreign remittances by Muhammad (2021) who found the channel of direct effect of disruption of migration from the Gulf to GDP performance in Pakistan.

5. COVID-19: DISRUPTION, VULNERABILITY, AND THE LIMITS OF RECOVERY

5.1 The Pandemic Shock

The pandemic COVID-19 sparked the biggest ever annual drop in Pakistan's migration. Annual registered emigration fell from 625,876 in 2019 to 225,213 in 2020 a 64 percent decline. The Gulf host countries locked down, halted construction projects, closed hospitality and retail, and significantly decreased foreign workers' demand. Saudi Arabia and the UAE (which alone accounted for 87 per cent of the migrants in 2019) had restrictive policies for Pakistan.

As people movement came to a halt, Meer & Villegas (2020) reported the lack of coordination among individual States in enacting travel restrictions during the pandemic. For Pakistani workers in the Gulf, this meant losing their job, visa expiring and their need to be repatriated or to be in the irregular status. The government of Pakistan has organized some 500 special flights and sent back an estimated 304,000 workers (Shah et al., 2024). De Lange, Mantu and Minderhoud (2020) demonstrated the structural vulnerability of migrant workers over COVID-19 which included low wages, precarious legal status, employers' housing and limited social protection all leading to acute crisis situations.

Data on remittances show the COVID-19 disruption and recovery trajectory in Table 4.

Table 4 *Pakistan's Gulf Migration System — COVID-19 Disruption and Post-COVID Recovery*

Indicator	2019 (Pre-COVID)	2020 (COVID)	2021 (COVID)	2022 (Post-COVID)	2023 (Post-COVID)
Total emigrants (N)	625,876	225,213	288,280	832,339	862,625
Year-on-year change (%)	+9.3%	−64.0%	+28.0%	+189.0%	+3.6%
Saudi Arabia share (%)	53.2%	60.6%	54.0%	61.9%	49.5%
UAE share (%)	33.8%	23.8%	9.5%	15.4%	26.7%
Gulf total share (%)	~95.9%	~95.8%	~90.5%	~95.8%	~91.1%
Unskilled + semi-skilled (%)	50.1%	49.9%	49.7%	53.6%	55.5%
Total remittances (USD billion)	21.74	23.13	29.45	31.28	27.33
Remittance growth rate	+9.2%	+6.4%	+27.3%	+6.2%	−12.6%

Source: Shah et al. (2024, Tables 1.1, 2.2, Figures 1.1–1.3, 2.1). Pre-COVID year is 2019; COVID years are 2020–2021; Post-COVID years are 2022–2023.

5.2 The UAE Anomaly: Country-Specific Disruption within Gulf Dependence

The UAE had a very pronounced and challenging trend in the overall disruption of the Gulf in 2020-2021. The proportion of Pakistani nationals living in Qatar dropped from 33.8 per cent in 2019 to 23.8 per cent in 2020, and plummeted to 9.5 per cent in 2021, the largest drop among all the main Gulf destinations. It is an "unprecedented decline" says Shah et al. (2024), and the UAE accounted for just 10 per cent of migrants travelling to that country in 2021 from 34 per cent in 2019.

This UAE specific collapse is due to policy decisions made by the host country and not due to any supply factors in Pakistan. The UAE had extremely stringent rules regarding entry during the pandemic times and changed some parts of the UAE's labour recruitment rules. The recovery was significant: In 2022, the UAE share rebounded to 15.4 percent, and 26.7 percent in 2023, which is close to but not quite the pre-pandemic share. The intra-gulf volatility demonstrates that while the Gulf in general is dependent, there is some vulnerability at the country level in the form of host country policy choices that would be mitigated through diversification.

5.3 The Remittance Paradox during Recovery

The post-COVID recovery created an analytically significant anomaly: an increase in emigration to record levels, associated with a decrease in remittances in 2022-2023. Despite the highest number of emigrants ever recorded in FY2022-23, total remittances decreased by 12.6 per cent from USD 31.28 billion in FY2021-22 to USD 27.33 billion in FY2022-23.

The explanation given by Shah et al. (2024) is that the misalignment of the official rate with the open market rate of the dollar caused remittance channels to shift from formal banking to informal channels, such as hundi and hawala. There were more emigrants abroad who were sending money via unofficial channels. This risk had been envisioned by Salik (2020) that exchange rate misalignment would lead remitters to informal channels which would provide them with more rupees per dollar. Muhammad (2021) has established that channel switching (from formal to informal remittances) has real macroeconomic effects beyond the measurement gap, that is, formal remittances are positively related with GDP growth in the long run.

The paradox provides one of the biggest challenges of Gulf dependence, namely that the macroeconomic impacts of migration are not only contingent on the numbers of migrants, but also on the management of the exchange rate. The Gulf is a region that relies on remittances for foreign exchange and so must also handle migration and exchange rates issues; these are two policy areas that are typically handled by different ministries with different priorities.

5.4 What COVID-19 Did Not Change

The most analytically significant result from Table 4 is what did not change due to COVID-19. In 2019, around 96 percent of emigration was to the Gulf and in 2023, about 91 percent. Unskilled and semi-skilled workers accounted for 50.1 percent of outflows in 2019 and 55.5 percent in 2023 a slight increase in the concentration of these categories after COVID as compared to before. Both pre- and post-COVID years saw Saudi Arabia as the prime destination of almost half of all emigrants. There was no change in the distribution of the source province over the 5 years.

COVID-19's impact on Pakistan's dependency on the Gulf did not bring any change in the structural relationship. It put strain on the system and exposed its weaknesses, including those of the migrant workers (De Lange, Mantu, & Minderhoud, 2020), the remittance risk due to exchange rate misalignment, and the lack of non-Gulf fallback destinations. Once the stress had been relieved, the system returned to its pre-COVID configuration. The basic problem for diversification policy is that the structural characteristics that underpin the Gulf dependence are not affected by external shocks. When the shock of the event is gone, they try to assert themselves.

6. DIVERSIFICATION CHALLENGES: WHY PAKISTAN CANNOT EASILY LEAVE THE GULF

6.1 The Skill Composition Barrier

The most basic challenge in destination diversification is the skill make-up of Pakistani emigrants. 62-68 per cent of total outflows are by general labourers and drivers. This profile of an occupational type would enable Pakistani migrants to be competitive in the Gulf labour markets where a high volume of low skilled manual workers is required but non-competitive in the professional labour markets of Europe, North America or East Asia, which favour candidates based on credential, language skills and technical skill.

According to Kone and Ozden (2017), more than two-thirds of all migrants with tertiary education in the world opt for four OECD countries that are all English speaking: the USA, the United Kingdom, Canada and Australia. The majority of emigrants from Pakistan are people who are not skilled in any technical education or professional qualifications or in English, which are required for these destinations. New bilateral agreements would be required for diversification towards these destinations, but more importantly a change of the skill profile of Pakistan's emigrant pool would be necessary. This transformation will take time and a consistent investment in vocational education and training and language education over the whole political cycle which no government in the last 8 years has made.

Shah et al. (2024) point out this directly: 'However, the skill profile of Pakistan's migrants has remained unchanged over the years, and a bigger worry in the occupational composition of emigrants should be on this aspect. Such lack of development could make Pakistani workers less competitive in a world where there is a growing demand for skilled workers. This is key; even in the Gulf, growing trends in labour markets as the economies in the Gulf Vision 2030 programmes evolve into knowledge and service driven are making low-skilled workers less competitive. Skill stagnation is not a problem for Pakistan's Gulf markets but a weakness which needs to be addressed in order to prepare for diversification outside of the Gulf markets.

6.2 The Kuwait Precedent: Host-Country Policy as Destination Constraint

The Kuwait case is one particular example of diversification problems: the conditions of the supply-side in Pakistan do not determine whether there are conditions for diversification on the demand-side. It was around 2010 that the new Pakistani immigration was virtually banned in Kuwait. Therefore, in the years 2019-2023, Kuwait has not been in Pakistan's top ten list of destinations (Shah et al., 2024). By a unilateral decision taken by the host country, an important destination has been effectively closed.

This history is significant to grasp the extent of Pakistan's diversification agency. Pakistan cannot afford to opt for more export of workers to non-Gulf countries. It demands that immigration routes be established by the countries that receive immigrants. As developed countries have begun to design immigration policies to choose immigrants on the basis of their skill, so too has that occurred in Canada, as Duncan (2009) demonstrated. These pathways are not suited for the low skilled workers in Pakistan. The countries that are easiest for Pakistani workers to access are also the ones that are most focused on manual labour: the Gulf States which actively recruit Pakistani manual labour workers.

6.3 Malaysia: A Partial Diversification Case

Among all recent migration flows, the largest non-Gulf one was to Malaysia. Its percentage amongst the Pakistani emigrants increased from 1.8 per cent in 2019 to 2.4 per cent in 2023. In absolute numbers, Malaysia has remained a small market; however, it is the only non-Gulf market to have been ranked in the top-ten destinations in Pakistan's destination list throughout the study period (Shah et al., 2024).

The Malaysia episode, however, shows that diversification can only take you so far. Remittances from Malaysia have decreased considerably, falling from USD 1.6 billion in FY2018-19 to a mere USD 0.1 billion in FY2022-23 (Shah et al., 2024), despite the growing inflows of emigrants from Malaysia. Increased labour migration to Malaysia by the Pakistanis is reducing remittances to their home country. This may be due to the use of informal channels, to wage differentials compared to the Gulf, or other reasons. So far as the Malaysia example is concerned, there's no automatic link between emigration diversification and remittance diversification. Macroeconomic impacts of migration are not necessarily a function of the number of migrants but of the wage and remittance patterns of migrants.

6.4 The Governance Gap: Migration Policy without Diversification Strategy

The policy of migration governance in Pakistan has been towards making migration to the Gulf easier and more regulated. The 1979 Emigration Ordinance (now the basic legislation) was developed to suit the context of the Gulf labour migration in the 1970s. It began implementing the Bilateral Agreement Framework and the BEOE (Protectorate Registration System). These institutions are properly designed for the Gulf migration system. They do not aim to help students migrate to the west for professional reasons or for diversification to alternative destinations or for a transition to work.

A new draft migration policy has been ready for over three years yet to be approved by Cabinet, writes Shah et al (2024). This governance deficit makes Pakistan lack an official diversification strategy. Without the diversification strategy, migratory movements take the path of least resistance – namely, bilateral agreements that are already in place, migration networks that already exist, and the existing infrastructure in the Gulf countries for migration.

Davenport (2004) differentiated out 'panic' policy reactions to migration from 'stimulation' reactions. Migration governance in Pakistan is not either of these — it is more a case of structural inertia (continuation of the existing pattern in the existing institutions) than of active management of migration towards the development objectives. The stimulation response to diversification would involve the establishment of new institutional routes, investments in skill development to new destinations outside the Gulf, and the development of the governance structure to manage more complex and multi-destination migration flows, which is exactly what Davenport (2004) described.

Table 5 ***Diversification Obstacles Structural Analysis***

Obstacle	Mechanism	Evidence from Pakistan Data
Skill composition	Low-skilled workers uncompetitive for professional visa pathways in non-Gulf destinations	55.5% unskilled/semi-skilled in 2023; 45% general labourers (Shah et al., 2024)
Migration culture	Self-reinforcing networks channel new migrants to established Gulf destinations	Same districts dominate source data 2019–2023; KPK 2x population share (Shah et al., 2024)
Bilateral infrastructure	Recruitment agencies, protectorates, and bilateral agreements designed for Gulf markets	1979 Emigration Ordinance; BEOE protectorate structure; no new framework approved (Shah et al., 2024)
Host-country policy	Non-Gulf destinations select on skill; Gulf destinations select on labour demand	Kuwait ban; Western destinations require credentials; Gulf absorbs 90%+ (Shah et al., 2024)
Remittance macroeconomics	Gulf remittances sustain FX reserves; disruption politically unacceptable	Saudi + UAE + GCC = ~55–65% of total remittances; peak USD 31.28bn FY2022 (Shah et al., 2024)
Governance gap	No approved migration policy; no diversification strategy	Draft policy awaiting Cabinet approval >3 years (Shah et al., 2024)

Source: Authors' analysis from Shah et al. (2024) and Shah et al. (2020). Davenport (2004); Kone & Ozden (2017); Duncan (2009); Murru (2009); Salik (2020).

7. TOWARD MANAGED DIVERSIFICATION: A POLICY FRAMEWORK

7.1 Why Diversification Matters Even If It Is Difficult

The diversification argument is not one that is based primarily on the replacement of the Gulf. Gulf migration will continue to be the major source of migration for the foreseeable future. The case is around minimizing vulnerability. System in which 91-96 percent of emigrants go to one region is a system in which a geopolitical shock, a host country policy change or a regional recession can bring Pakistan's labour market to its knees and foreign exchange position into trouble at the same time. COVID-19 demonstrated just such a weakness.

But diversification does not imply abandoning Saudi Arabia for Canada, or for Malaysia, the UK, the Central Asian states and others to account for

15-20 per cent of total outflows, instead of 4-9 per cent. Just a little bit of diversification would lessen the effect of a shock that occurred in the Gulf. Furthermore, promoting professional orientation (toward the UK, Canada and Australia) creates knowledge transfer, brain circulation, and remittances potential per capita even with moderate numbers of migrants. The combined contribution of USA and UK to Pakistan's remittance inflows was 24-31 per cent of BEOE-registered emigrants (less than 0.5 per cent) (Shah et al., 2024). There are disproportionate economic returns to small professional flows.

7.2 Skill Development as the Foundation

The key to any diversification initiative is to enhance the skill mix of Pakistani emigrants. This is the most basic and most challenging suggestion.

- Vocational training for non-Gulf markets: To create training programmes, which are sector-based, calibrated with the demand for skilled workforce in Malaysia, the Central Asian states and selected European countries — this is not vocational training in general, but vocational training in particular that is calibrated with the demand for skilled workforce in the targeted countries and countries and their vocational training qualification systems. According to Kone and Ozden (2017), the world's high-skilled migration is increasing at a higher rate compared to the current rate of migration. Pakistan needs to strategically situate its emigrants for this growth.
- The key requirement for professional migration to the UK, Canada and Australia is English Proficiency, (also known as 'professional language training') which is taught at the university. Arabic skills improve career opportunities in the professional world in the Gulf. Systematic language training would be integrated into emigration preparation courses, as a skill to be learned rather than an additional program. Systematic language training courses would be integrated into the emigration preparation courses as a skill to be learned and would increase the destinations available to Pakistani workers.
- Increasing the capacity of training nurses will help address the demand as Pakistan lost 337 nurses in 2019 and 4880 in 2023 (Shah et al., 2024). Raghuram (2009) offered an ethical framework to guide the management of the health worker's mobility: international recruitment agreements which require investment in training in the origin country as a precondition for recruitment.

7.3 Bilateral Agreement Diversification

Pakistan has bilateral labour pacts mainly with the Gulf countries. The bilateral approach will have to be extended to non-traditional destinations, and this will need both domestic policy initiative and willingness from the receiving countries.

- For brain circulation in low-institutional-quality settings, Central Asia serves as a case study: Olimov, Grote, and Gharleghi (2020) highlighted how brain circulation is possible in the face of shared historical experience and regional cooperation. Pakistan is linguistically and culturally near to the central Asian countries. Structured labour exchange agreements, which target particular industries where the two sides have complementary needs, might generate new migration corridors without calling for labor market skill transformation, as is required by professional destinations in the West.
- Malaysia management: Malaysia is the biggest non-Gulf destination for remittance inflows for Pakistan but the dip in remittance flows from it (from USD 1.6 billion to USD 0.1 billion) points to a severe governance and management deficit. Prior to any increase in flows to Malaysia, renegotiation of labour agreement terms with Malaysia should be bilateral, covering wage rates, the facilitation of remittances, and protection for workers.
- Ethical management of NHS recruitment from South Asian health systems is essential to prevent health systems in the sending countries from becoming health resource depleted, as demonstrated by Raghuram (2009). Pakistan must discuss a bilateral framework for recruiting from the NHS with the UK that will involve the setting

of a cap on the number of nurses permitted to travel and a commitment to investment in training nurses in their country of origin.

7.4 Governance Reform

Governance structures that are missing in Pakistan are needed for diversification.

- Accept and adopt the draft migration policy: The above-mentioned draft migration policy that has been pending with the Cabinet for over three years (Shah et al., 2024) should be made effective. It should contain a clear destination diversification requirement and targets, sufficient resources, and a monitoring system.
- Extend BEOE data systems: BEOE currently only registers formally registered migrants in protectorates. This doesn't capture most of migration to the west by professionals. Professional emigration should be systematically recorded, at all visa categories, at High Commissions in order to create the data basis needed for diversification policy.
- The exchange rate management as migration policy is supported by the fact that the remittance decline in FY2022-23, despite record emigration, (Shah et al., 2024), disturbs the macroeconomic gains from migration. Their remittance effects need to be taken into consideration for the management of exchange rates. In addition, there must be coordination between the State Bank's exchange rate policy and the migration governance of the Ministry of Overseas Pakistanis, which there is no formal coordination between at present.

8. DISCUSSION

8.1 Structural Dependence as a Development Trap

The Gulf dependency literature shares some structural characteristics with Pakistan's dependency on the Gulf. Like oil dependent economies that institutionalize, shape fiscal structures and political economies around resource extraction, Pakistan has also institutionalized, shaped fiscal structures and political economies around the migration-remittance-dependence around Gulf labour supply, even as the resource is starting to run out. The building is not purely a business building. It involves bilateral governance systems, recruitment agency industries, source district migration cultures, and political constituencies whose interests are met with the continued flow.

In this regard, Salik (2020) explained that Pakistan's macroeconomic vulnerability, i.e., continued trade imbalance and foreign exchange crisis, has positioned Pakistan heavily on remittances from Gulf countries and has narrowed down the political space for reforms. The governments that depend on remittances from the Gulf for their BOP are not going to be able to mess with the migration patterns that create these remittances. If migration to the Gulf is a suboptimal long-term development strategy, governments that rely on such remittances for BOP management will not want to mess with the migration stream.

8.2 The COVID-19 Window That Closed

The interruption of the Gulf migration could have provided a temporary respite for re-thinking Pakistan's migration strategy in a structural manner, had it not been for COVID-19. In this paper, Bakalova et al. (2021) suggest that the COVID-19 pandemic has opened up the possibility of reverse brain drain skilled migrants who are going back to their country of origin to work for foreign employers. The COVID-19 pandemic caused migrants to rethink their international situation, as illustrated by Içduygu (2020).

Pakistan was not able to take advantage of this window. Once the Gulf economies re-opened, the structural conditions that led to the initial migration patterns remained the same, and the workers came back more of them than before. The rise in registered emigrants from 2021 to 2022 – 189 percent in total was not a structural shift. It was a demand that had been frustrated by the COVID limitation that has now been lifted. No rethinking of structures took place in the window. This is a recurring feature of the governance of migration in Pakistan. External shocks (such as the COVID-19 crisis, oil price collapses in the Gulf region, host country policy change) do cause temporary disruptions that expose structural vulnerabilities but do not necessarily produce structural change. According to Davenport (2004), policy responses to migration problems must be stimulation, not panic. The Pakistani response to COVID-19 was crisis management; it was about repatriating people and providing them emergency support; it was not about stimulation, that is, to build the skill and governance systems to diversify.

8.3 Gender and Gulf Dependence

Two sides to Gulf dependence are revealed through the lives of the women who migrate. Women make up about one per cent of total Pakistani emigrants, 8,126 in 2023 (Shah et al., 2024). Their skill profile is, however, very different to male emigrants: in 2022, around a quarter of female emigrants were in very highly qualified and skilled roles, compared with around 5 per cent of male emigrants.

Female emigrants' top destinations include Saudi Arabia (35.1%), UAE (24.3%), and the UK (10.3%) in 2022 (Shah et al., 2024). The UK is home to the largest proportion of female Pakistani emigrants compared to the total BEOE emigrants (10.3 percent compared to 0.4 percent). This is largely due to the recruitment of Pakistani female healthcare workers, especially nurses, by the UK's NHS. This difference in migration pattern between males and females is quite distinct, as the women are more skilled, more western and more focused in the categories of jobs which are important to the state. However, there are only a small number of female emigrants as compared to male emigrants. A more gender-inclusive migration policy, which sets up secure and regular channels for the skilled migration of women, may serve the diversification and gender equity objectives at the same time.

9. CONCLUSION

This study analyzed the structural interdependence on the labour market of the Gulf countries, the disruption caused due to COVID-19, and the potential challenges to destination diversification during post-COVID-19 recovery. There is no doubt in the empirical record, as synthesized in BEOE data for 2019-2023 by Shah et al. (2024): Gulf dependence is deep, persistent, and structurally reinforced. In each of the years 2019 to 2023, Saudi Arabia was the destination for 49.5-61.9 per cent of all Pakistani emigrants. Share of the Gulf total was 90-96 percent. Outflows were made up of unskilled and semi-skilled workers, between 50-56 percent of the total during the study period. The top ten districts are consistent year after year for the same source districts. There was a serious disruption due to COVID-19, but there was no structural change. Gulf concentration increased and the proportion of unskilled workers decreased slightly during the period of recovery from the COVID pandemic, which brought back pre-COVID trends.

There are three structural features that create this dependence, and that can make diversification a challenge. First, the skill level of Pakistani emigrants is closely aligned with the demands for labour in the Gulf, but not the professional ones. Second, migration culture in the source districts (such as self-reinforcing networks, migration networks built up and embedded in the local area, and aspirational models of migration based on jobs in the Gulf) is a factor that pushes new migrants to preferred destinations. Third, the governance framework in Pakistan with its institution of the 1979 legislation system, its BEOE which was based on the Gulf recruitment system and the lack of an approved migration policy is not equipped to handle a more complex and multi-destination system of emigration.

All three must be addressed in order to diversify. The skill composition barrier argues for a continued effort in the vocational training and language skills training that needs to be adjusted to the needs of non-Gulf destinations, and this effort would take a decade, which has never been done on a systematic basis. It will take time and cannot be mandated by policy to develop new demonstration effects, visible success stories of migration to non-Gulf destinations that will be necessary for the migration culture barrier. The governance barrier involves passing the draft migration policy, increase BEOE data systems and create bilateral agreement infrastructure for new destinations.

All of these changes is no easy or quick politically. Remittances from the Gulf are essential for Pakistan's macro-economic activities. Gulf host countries have designed their recruitment systems in line with the Pakistani workers. Current migration flows are the source of political interests in constituencies in the source countries. Political interests from constituencies in the source countries are vested in current flows. However, the crisis of the COVID-19 experience demonstrated the price of dependence: a drop in emigration of 64 percent in one year, the return of 304,000 workers, and an impact on macroeconomics which revealed a lack of backup plans. The issue of the Pakistan's migration governance is not whether a diversification is needed. Whether the political will to start the process can be created before the next shock happens is what is at stake.

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