Labour & Development, Vol. 24, No. 1, June 2017

NEW ERA IN INDIA – GULF LABOUR MIGRATION

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The Gulf Cooperation Council (GCC) countries depend overwhelmingly on international migrant workers to fill most private sector jobs. Lower oil prices and the rapid growth of the domestic labour force have given new impetus to government efforts to diversify GCC economies away from dependence on oil and to encourage natives to fill private sector jobs. Some GCC governments are sharply reducing spending, leading to layoffs and leaving migrant workers stranded, even as India and other countries that send workers to GCC countries are improving the training of their potential migrant workers and streamlining deployment procedures. The result could be frustration as some workers return empty-handed while others chase a diminishing number of jobs abroad, which could raise worker-paid migration costs.

Key Words: International Labour Migration, India-Gulf Migration Corridor, Recruitment Landscape.

1. INTRODUCTION

In August 2016, the Indian government decided to evacuate thousands of Indian migrant workers who were stranded in Saudi Arabia. Though the government has previously rescued stranded Indian workers from the Gulf countries, the present case is distinctive because the workers to be evacuated were retrenched from their jobs and were not paid their wages and other entitlements for several months. Many workers were reluctant to leave, fearing that once back home they would be unable to recoup their accumulated dues. For almost all these workers, returning to India was distressing, as they had invested considerable amounts in recruitment costs to obtain employment in Saudi Arabia. Is the plight of these stranded workers a foretaste of what lies ahead for migrants in the Gulf Cooperation Council (GCC) countries? Three variables, the decline in oil prices, rapid growth of the domestic labour force in GCC nations, and the ongoing labour market nativisation strategies of GCC countries, are crucial.

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2. EMERGING DEMOGRAPHIC, LABOUR MARKET, AND ECONOMIC SITUATION IN GCC COUNTRIES

The GCC nations have a unique demographic, labour market, and economic profile. The GCC population of 53 million, with Saudi Arabia accounting for 60 percent of the total, is projected to increase by a quarter to over 66 million by 2030, reflecting high fertility rates and significant in-migration. The foreign share of the population in GCC countries ranges from a low of 33 percent in Saudi Arabia to a high of 90 percent in Qatar (Table 1).

Table 1
Population in GCC Countries, 2015 and 2030

	Pop. (2015, millions)	Foreign Share (%)	Pop. (2030, millions)	Increase in Pop., (2015-2030, %)
Bahrain	1.4	52	1.7	21
Kuwait	3.8	69	5	32
Oman	4.2	45	5.5	31
Qatar	2.4	90	2.8	17
Saudi Arabia	31.6	33	39	23
UAE	9.6	88	12.3	28
Total	53	49	66.3	25

Note: Foreign shares of population are for 2010 (UAE) and 2014-15 (other GCC Countries).

Sources: Population Data from Population Reference Bureau (PRB); Data on Foreign Share from Gulf Labour Markets and Migration (GLMM).

GCC countries had 10 million residents in 1975, including nearly 10 per cent who were foreigners (Fargues, 2011). The share of foreign population went up to one-third in the early 1980s and was expected to decline thereafter as the first wave of infrastructure projects taken up after the oil price hikes of the 1970s was completed. Instead, the proportion of foreign population increased to reach half of the total population, as foreign workers filled most of the growing number of private sector jobs and entered private homes as domestic workers.

Most of the foreigners in GCC nations are from South Asia. In all, eight countries each have over a million citizens in GCC countries, and they collectively account for almost 90 percent of the foreigners in these countries (Table 2). The largest country of origin is India, with 7.4 million citizens in GCC countries in 2013-14, two-thirds of them in the UAE and Saudi Arabia combined. Bangladesh is next, with 3.3 million citizens, half of whom are in Saudi Arabia, followed by Pakistan with 3.2 million, also almost half in Saudi Arabia.

Table 2
Distribution of Foreign Population in GCC Countries According to Nationality 2013-14 (%)

	India	Bangla-desh	Pakistan	Egypt	Philip-pines	Indone-sia	Nepal	Sri Lanka	Total of Eight Countries
Bahrain	5	3	3	1	3	1	2	2	687,000
Kuwait	11	6	4	24	11	1	5	12	2,037,436
Oman	9	19	7	1	2	2	1	2	1,663,852
Qatar	7	5	3	8	12	2	31	9	1,704,000
Saudi Arabia	32	46	46	47	40	90	39	49	9,625,000
UAE	35	21	37	19	31	5	23	27	6,110,530
Total	7,407,592	3,272,221	3,241,112	2,144,910	1,672,888	1,671,210	1,296,000	1,121,885	21,827,818

Note: Data are for 2013-14 except Oman, for which data are for 2015.
Source: Gulf Labour Markets and Migration (GLMM).

One of the most interesting aspects of the employment scenario in the GCC countries is the difference in the share of foreign workers in the public and private sectors. Only a sixth of the five million public sector workers in the GCC are foreigners, with a range of less than 10 per cent in Oman and Saudi Arabia to almost 60 per cent in Qatar (Table 3). On the other hand, foreigners constitute over 90 per cent of private sector employment in GCC countries, and there is much less variance between countries, from a low of 80 per cent in Bahrain to almost 100 per cent in Qatar and UAE.

Table 3
Foreign Shares of Workers in GCC, Public and Private, 2013-14

	Public	Foreign Share (%)	Foreigners	Private	Foreign Share (%)	Foreigners
Bahrain	149,868	25	37,467	489,090	81	396,163
Kuwait	439,204	30	131,761	1,314,800	93	1,222,764
Oman	378,355	7	26,485	1,362,118	87	1,185,043
Qatar	161,748	57	92,196	1,039,541	99	1,029,146
Saudi Arabia	3,034,201	4	121,368	8,487,533	87	7,384,154
UAE	1,000,000	40	400,000	4,147,000	100	4,147,000
Total	5,163,376	16	809,277	16,840,082	91	15,364,269

Note: Total and public sector labour force data for the UAE are approximate.
Source: Gulf Labour Markets and Migration (GLMM) and National Statistical Offices.

The six million GCC nationals in the workforce constitute a small share, in the total population, of persons 15 and older who can work. For instance, in Saudi Arabia, the labour force participation rate of persons aged 15 plus is less than 40 per cent, compared with a 70 per cent rate in the US and 80 per cent in Scandinavian countries. The largest gap in labour force participation is for women. Less than 20per cent of Saudi women work, compared with over 70 per cent in the Organisation for Economic Co-operation and Development (OECD) countries. Interestingly, even though relatively few GCC nationals work, unemployment rates among nationals are rising, especially for youth. This is particularly striking in the case of Saudi Arabia where the youth unemployment rate (15-24 years) has increased from 22 per cent in 1999 to 31 per cent by 2015 (International Labour Organization (ILO), 2016).

The economies of the GCC countries are largely based on the export of oil and gas. GCC governments use oil and gas revenues to create jobs for nationals in the public sector and jobs for foreign workers in the private sector. Government revenue from oil affects migration flows, with more arriving when oil prices are high and GCC governments issue contracts for major infrastructure projects. Most firms providing services to governments are private, so foreign workers are concentrated in the private sector.

The price of oil, which averaged $100 a barrel between 2010 and mid-2014, has fallen to less than $50 a barrel in 2016 and is expected to remain at this level for the next few years because of new supplies, such as from US shale, and pressure on Organization of the Petroleum Exporting Countries (OPEC) suppliers (including Iran and Iraq) to pump in order to raise government revenues.[1] Most projections echo the International Monetary Fund (IMF), which predicts that "oil prices will remain relatively low for some time" (Baffes *et al*., 2015).

Analyses of GCC demographic prospects and economic patterns conclude that the status quo is not sustainable (Forstenlechner and Rutledge, 2011; Hertog, 2013). Analysts urge GCC governments to change their policies to promote economic diversification away from oil and persuade natives to change norms and attitudes to accept private sector jobs. An IMF report on the GCC noted that "between 2000 and 2010, about 7 million jobs were created in the GCC countries (excluding UAE), of which 5.4 million were in the private sector…nearly 88 percent of these private sector jobs were filled by foreign workers (85 percent low skilled), while nationals filled over 70 percent of public sector jobs" (Callen *et al*., 2014:12). Another IMF report advised GCC governments that "reducing the availability and attractiveness of public sector employment will be critical to create incentives for nationals to seek private sector jobs" (IMF, 2014: 4).

The question for GCC governments is how to achieve diversification away from oil but continue to generate government revenue and nativise the private sector labour force. Dubai is often touted as a model for diversification, with construction, transportation and logistics, shopping and tourism, and finance creating a non-oil-based economy. However, the Dubai model may be difficult to adopt in neighbouring GCC countries, since there is limited demand in the region for some of the keystones of Dubai, such as an airport that is a preferred transit among international travellers.

Most studies recommend more non-oil-related manufacturing and service industries such as finance to create jobs for nationals and generate earnings from exports (Hvidt 2013). Making such a transition to new industries and native workers is hard. For example, most GCC manufacturing exports are in the chemicals sector, which is closely linked to oil, and most of the workers in the expanding chemical sector are foreigners (Callen *et al*., 2014).

The missing link in limited economic diversification and labour force nativisation is the lack of incentives. GCC countries have avoided Dutch disease, the rising value of the currency from oil exports that reduces non-oil exports, through the presence of foreign workers who hold down private sector wages. Governments distribute oil revenues via contracts for domestic projects, giving private firms an incentive to focus on domestic rather than export projects and to use foreign workers to keep labour costs down and bolster profits (Callen *et al*., 2014; Hertog, 2013). Under the current system, native workers have incentives to seek public sector jobs that offer high wages and security rather than private sector jobs that involve lower wages and more work.

The reservation wages of migrants are set by home-country conditions, and foreign workers in GCC countries have limited bargaining power, so reliance on migrants holds down private sector wages and allows private firms to extract rents (Hertog, 2013). As reliance on foreign workers in GCC countries has increased, average labour productivity has declined in many industries, suggesting that wages for foreign workers may be less than their marginal product. The low wages paid to migrant workers helps to explain why the share of national income accruing to capital in GCC countries is 75 percent or more, among the highest in the world (Callen *et al*., 2014; Hertog, 2012).

3. MIGRANT WORKERS AND THE CHANGING RECRUITMENT LANDSCAPE IN GCC COUNTRIES

When the price of oil rose in the mid-1970s, previously poor desert economies embarked on a government-funded building spree, issuing contracts to multinationals to build highways, airports, and urban infrastructure, including government buildings and private housing. Most of the workers employed in these first-wave construction projects were men from Arab and Asian countries, and most lived on the construction site while they were in GCC countries.

The multinationals included the cost of recruiting and employing foreign workers in their bids. First-wave construction projects typically paid all of the migration costs of the migrant workers they recruited, including passport, visa, transportation, and other costs, and workers arrived from many countries, from Egypt and Korea to India and the Philippines.

After first-wave projects were completed, a new type of construction firm emerged to bid on government contracts, often with a local owner and a foreign partner (Dito, 2010). Migrants returning from several years of work in GCC countries with savings informed friends and relatives about higher wage jobs there, and soon there were more workers seeking jobs in GCC countries than were available (International Organization for Migration (IOM), 2016; Sasikumar, 1995; Shah and Menon, 1999).

Governments in migrant-sending countries, in a bid to protect low-skilled citizens headed to GCC jobs, enacted protective measures, including the mandatory utilisation of licensed local recruitment agencies by departing low-skilled citizens and checking of the contracts issued by GCC employers by government agencies before departure. GCC governments required migrants to undergo health and police checks before they could receive visas and arrive for jobs, forcing many rural residents unfamiliar with the procedures of these institutions to turn to recruiting agents (not necessarily licensed) to navigate exit procedures.

Many of the policy changes in countries of origin (COOs) and countries of destination (CODs) aimed to reduce human trafficking, but they also made it more difficult for low-skilled workers to depart for foreign jobs without assistance. With labour forces increasing faster than formal jobs in South Asia, and Southeast Asia, both GCC employers and recruiters realised that workers were willing to pay for higher wage jobs, and they began to charge foreign workers.

Workers are motivated to cross national borders by higher wages and more opportunities. When first-wave multinationals paid all migration costs for the workers they recruited, migrants received all of the wage gap or wedge to compensate them for separation from family and restricted rights abroad. However, with 1,000 Indian workers seeking 100 GCC jobs, some of this wage wedge was diverted to employers who offered jobs and the recruiters who controlled access to them. Migrants still earn more abroad than at home, but they may have to give up 10 to 30 percent of their foreign earnings to the migrant infrastructure that moves workers over borders.

There is an equity dimension to recruiters taking some of the wage wedge, since the ILO Convention 181 calls on employers to pay all costs for migrant workers they recruit in other countries. In fact, employers generally pay most or all migration costs for highly skilled workers for the simple reason that the supply of professionals willing to work in the GCC approximates the demand for them. Moving down the skill ladder, to jobs paying less than $500 a month, the supply of workers is higher than the number of jobs, and lower wage foreign workers typically pay most or all of their migration costs.

The 15 million low-skilled foreign workers employed in the private sector of GCC countries are the focus of efforts to understand who benefits from the current migration system and whether the migration costs paid by workers seeking jobs in GCC nations can be reduced. If migrant workers each paid $2,000 for their GCC jobs, moving workers to the GCC is a $30 billion business. If migrants stay in the GCC an average two years, the annual revenues for the GCC migration business are double the value of Indian cotton exports ($7.5 billion in 2015) and a quarter of Bangladeshi garment exports ($27 billion in 2015). Some of the migrant workers are skilled and have lower migration costs, while some low-skilled migrants pay more than $2,000.

4. THE JOBS CRUNCH

Mohammed, a 30-year-old Pakistani farmer with a primary school education, paid $4,000 to get a construction job in Saudi Arabia that paid $400 a month.[2] Mohammed did not have the $4,000 to buy a work visa and pay agent and transportation costs, so he mortgaged his land, expecting to repay the loan with some of the $9,600 he would earn in Saudi Arabia. With uncertain Pakistani earnings of $100 a month and a wife and four children to support, working abroad seemed the fastest way to achieve upward mobility at home, even if half of the expected extra income from working abroad went to recruiters.

Rahul, a 30-year-old Indian construction worker with a secondary school education, paid $1,200 to get a construction job in Qatar that paid $400 a month. Rahul offered no collateral to borrow from friends and family to pay his migration costs, and expected to quickly repay this loan from three months of foreign earnings. Rahul earned $150 a month in India, but since his employer paid for housing and food in Qatar, he could achieve his goal of saving $5,000 far more quickly by working abroad.

Will future Mohammeds and Rahuls be able to achieve saving targets in GCC countries? GCC governments, mindful of the Arab Spring uprisings of jobless youth, want to substitute native for foreign workers despite lower oil prices and slower job creation. Saudi Arabia illustrates the challenge. Two-thirds of Saudis in the labour force are employed by the government, where high salaries, good benefits, and little work are the norm. Public sector wages are on average 70 percent higher than comparable private sector wages, and they consume 45 percent of Saudi GDP. The government's National Transformation Program aims to reduce government employment and to have half of the Saudis working in the private sector by 2020, where decades of reliance on migrant workers have held down wages and led to expectations of hard work.

The Saudi government has a *Nitaqat* or Saudisation policy that requires at least 10 percent of the employees of all businesses to be nationals. Private firms with no Saudi employees can be labelled red and risk being shutdown or denied permission to hire more foreigners. To avoid closure, private firms often hire Saudis in name only because they find nationals are not prepared to work as hard as the foreigners on whom private firms rely. Such in-name-only hiring reinforces the gap between little-working Saudis and hard-working foreigners.

To prevent in-name-only hiring of natives, the Saudi government has made various sectors off limits to foreigners, albeit with limited success. The government's current target is retailing, where 20 percent of 1.5 million employees are Saudis and there is a push to deny retailers permission to hire more foreign workers. There is also discussion of imposing more liabilities on foreigners by raising Value Added Tax or levying income taxes, which would likely require their employers to raise wages, or allowing foreigners to change employers, which could also push up wages.

The GCC jobs crunch arises from the fact that both GCC and South Asian governments are eyeing the same shrinking private sector labour market for their expanding workforces. India's labour force grows by nearly 10 million a year, and over a million Indians leave to work in GCC countries annually, 40 percent to Saudi Arabia and 30 percent to the UAE. The Indian government has embarked on a national skills upgrading programme, including providing skills to Indians seeking jobs in GCC countries.

Working in GCC countries is attractive to South Asians. India has the largest labour force among countries sending workers to the GCC, and most Indian workers at home are employed in the informal sector, where they may not work regularly or receive work-related benefits such as pensions. For example, less than 20 percent of the almost 475 million Indians in the labour force have regular wage and salary jobs (Institute for Human Development (IHD), 2014). GCC countries provide formal jobs for Indian workers, including regular wages and some work-related benefits, but at the cost of restricted workplace rights, including the right to form or join unions. Children in migrant families generally get more education and better health care than children in families that do not receive remittances, so that parents who sacrifice by working abroad enable some of their children to get the education needed to obtain better jobs at home or abroad (Sasikumar, 2014).

Indian construction workers returning from Qatar reported earning four times more abroad than they would have earned in India, allowing them to remit 70 percent of their Qatari earnings and to achieve savings targets much faster than if they had remained at home. Workers returning to Bangladesh, Nepal, and Pakistan expressed similar satisfaction at achieving savings targets, even though they paid more than the two to three months GCC earnings that Indians paid to get their jobs.

The migration infrastructure that moves South Asians into GCC labour markets is well established, so that human resource managers in large GCC firms, and the owners or co-owners of many private GCC businesses, are South Asians. They emphasise to potential migrants the fact that, with housing and food provided to most low-skilled workers, employment in GCC countries with fellow citizens as co-workers is not a completely "foreign experience".

Decades of migration have forged strong networks to link South Asian workers with GCC labour markets, raising the question of what will happen if the number of GCC jobs shrink. Will India and other South Asian countries grow fast enough to absorb youth who, in earlier decades, would have migrated to GCC countries, or will competition for the fewer remaining GCC jobs intensify?

5. STATUS QUO OR JOBS CRUNCH?

Labour migration in the GCC countries is at a crossroads. What began four decades ago as a multinational-led effort to quickly build infrastructure in relatively underdeveloped regions with foreign workers (whose costs were borne by their employers) has evolved into reliance on foreign workers to fill 90 percent of private sector jobs. The migration infrastructure generates billions of dollars in revenue from moving workers into GCC countries. Such profits earned by the employers and recruiters of low-skilled workers are condemned by international organisations, civil society organisations and others.

Can the migration status quo continue? If the price of oil rebounds, GCC governments will have more money to continue to employ both native and migrant workers, but perhaps not enough to employ rising numbers of both groups. If the price of oil remains low, there could be a jobs crunch that involves more and more migrants seeking fewer and fewer jobs in GCC countries, and the era of high oil prices that led to a building and services boom in GCC countries that created millions of jobs for low-skilled South Asians may be coming to an end.

All countries have safety valves and safety nets. The safety valve of out-migration allows workers who cannot find decent jobs at home to work abroad. Social safety nets provide payments or benefits to those unable to work and earn, and remittances to the families of migrants have become an important safety net for the families of migrants in South Asia as well as of non-migrants who benefit from the spending of remittances. Remittances to India topped $72 billion in 2015, with almost half of this originating in GCC countries. If the safety valve of migration to GCC countries shrinks, the social safety net of remittances is likely to decrease, which could slow development in migrant areas of origin and increase frustration on the part of youth looking for the opportunities abroad that their parents enjoyed (Wickramasekara, 2015).

Policy changes in GCC countries have the contradictory goals of moving more nationals into private sector jobs and improving conditions for migrants. The major mechanism for moving natives into jobs has been the stick of requiring private employers to hire a certain number or share of natives and paying of fees and fines if they do not. Criticism and economic self-interest are encouraging GCC governments to make policy changes to better protect migrant workers and allow more of them to make careers in GCC countries. If this fewer-and-better foreign worker policy is successful, GCC employers are likely to prefer experienced migrants to both natives and newcomers, frustrating GCC government goals of moving nationals into private sector jobs and denying youth coming of age in COOs an opportunity to work abroad.

A jobs crunch in GCC nations will have repercussions in India and other South Asian COOs with an extensive private recruiting infrastructure to move workers abroad. Ironically, India and other governments have taken unilateral and multilateral steps to improve the efficiency of sending workers abroad and to increase protection for low-skilled migrants just at a time when a lower price of oil is reducing the demand for low-skilled workers in the GCC.

In the longer term, the GCC labour migration system may involve fewer and more skilled migrant workers employed for longer periods. This will help those who already have jobs in the GCC, but may increase migration costs in COOs for new job-seekers chasing a dwindling number of jobs. Meanwhile, some of the workers who paid up to six months of GCC earnings for their jobs face the prospect of returning with less savings than they anticipated as GCC governments slow or stop payments to construction firms. The plight of unpaid migrants in GCC countries may be a foretaste of what is to come if lower oil prices and labour force nativisation policies persist.

NOTES

1. Organization of the Petroleum Exporting Countries (OPEC) produce about 36 million barrels of oil a day, 40 percent of the world's supply. US oil production almost doubled from 7.5 million barrels a day to 13 million barrels a day between 2010 and 2015. Shale oil has relatively low capital requirements and shorter life cycles, with most of the oil extracted from a particular formation within three years (Baffes *et al*., 2015).
2. The information provided with respect to the recruitment costs in case of the Pakistani and Indian migrant worker is drawn from a recent survey, *Worker Paid Migration Costs* (2015), undertaken by the Global Knowledge Partnership on Migration and Development - KNOMAD, World Bank. The survey covered different migration corridors including Pakistan–Saudi Arabia and India–Qatar. Results of this survey have also been used to substantiate certain arguments later in the paper.

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