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Labour Immigration and Labour Markets in the GCC Countries: National Patterns and Trends

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Abstract

Using the latest statistical data from six GCC states and recent publications of the GCC Secretariat, a detailed profile is presented of immigration and employment across the region. Evaluation is made of the available data sources (listed in the appendix) and the actual extent of immigrant presence in both population and labour market is critically examined. Employment according to public/private sector, and also for fifteen economic sectors, is shown for each country (where available) by citizenship type and gender. Previously unpublished indicators, such as unemployment and participation rates, are calculated where possible by citizenship type, gender and age groups; a few countries provide data on actual nationalities or regional groupings of foreign employees, and these are reproduced here. Previously neglected issues that receive some attention are foreign births, family presence, foreign schoolchildren and duration of residence (the latter available only for the UAE).

The emergence of the *kafala* system is examined in historical context; in particular, emphasis is placed on its role in promoting irregularities in the migration, residence and employment of foreigners across the GCC. Trends in government policies are described, including the recent and significant doubts in some countries about the ability of the *kafala* system to produce satisfactory outcomes. Some attention is paid to the important policies of 'nationalization' of GCC labour markets: a conceptual categorization of such policies is made, according to five different policy objectives. Using both the broad and more detailed sectoral employment data previously presented, evaluation is then made of the degree of success of each country's initiatives in this area.

The paper concludes with an exposition of the commonalities and differences across the GCC in managing their labour markets and immigration. The structural specificities of each country are outlined, along with tentative prognoses of their future needs for immigrant workers.

1. INTRODUCTION AND RESEARCH NOTE

The aim of this paper is to examine in some detail the nexus of immigration and labour markets in the six GCC[1] countries, along with an account of national policy trends and policy outcomes. Although there is a certain amount of literature on the GCC labour markets, historically the poor quality – or even existence – of data has made analysis extremely difficult and in certain respects impossible. Recently, this has started to change and rather

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[1] The Gulf Cooperation Council is a regional cooperation system between the Arab States of the Gulf and was established in 1981. Its constituent member states are Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates.

more data have been published on government internet sites. Even so, these data require extensive re-presentation, calculation and interpretation, which have not yet appeared anywhere in the literature. To guide the reader, a brief discussion of sources is provided in sections 1.1 and 1.2, along with an appendix to the paper detailing the major national statistical sources used.

Section 2 is the empirical core of the study. It begins with an account of the evolution of the indigenous labour forces in GCC countries, and provides both historical and up-to-date population and employment data for each country. The characteristics of national labour markets are then examined in some depth, with new calculated data on participation rates, unemployment rates, and the well-known problem of segmentation of the economy into public and private employment sectors. Detailed data on employment by economic sector are presented for the first time for five countries, showing immigrant presence clearly. Finally, the characteristics of the immigration populations and labour forces are explored, using newly published data. Several novel aspects are explored – including family presence, duration of residence and the role of women.

Government policies are examined in section 3, with some detailed discussion of various aspects of illegality, which have come to dominate the migration system in the last decade. Policy trends are outlined with a particular emphasis on nationalization programmes and incipient reforms of the *kafala* system. Using the extensive empirical data from section 2, evaluation of policy outcomes is then made.

The conclusion (section 4) synthesizes the different strands contained in the separate sections, identifying the major commonalities across the region, but also showing that there are very different national patterns of labour markets, economic and political structures, and migration management.

1.1. Data sources in the GCC countries

Unlike most other Arab countries, the GCC countries have a very short and constrained history of demographic and labour market data-collection (Kapiszewski 2001: 27). As recently as 2006, a pre-eminent demographer of the region was able to write that 'with the exception of Oman since 1993, the GCC countries do not publish official data even regarding certain basic demographic characteristics of the indigenous populations' (Winckler 2009a: 17). Although there are clear historical reasons why data collection has been poorly developed in the region, the last few decades of lack of data seem to be linked with policy decisions to suppress sensitive data. In the case of demographic data, this is attributed to the

desire to 'disguise the huge percentage of foreign population' (Winckler 2009a: 17), along with the fear among privileged elites that providing such information to outsiders could harm national interests (Kapiszewski 2001: 27–8).

Similarly, the quality of employment, and especially unemployment, data has historical origins. These include the absence of unemployment insurance systems, so that few registered as unemployed; the existence of substantial informal and family employment, especially concerning women; and the deliberate under-reporting of unemployment rates in order to conceal their increases (Winckler 2009a: 37–8). A similar argument can be made for the paucity of employment data, since they might reveal the actual progress of policies to replace foreign workers with indigenous ones (the so-called 'nationalization policies').

Data on immigrant populations have also been poor by virtue of two endemic problems: the lack of recording of accompanying family members (usually without the right to work) and the substantial number of irregular migrant workers (Winckler 2009a: 40; Kapiszewski 2001: 27). Recording of family members is now more controlled and accounted for; irregular migrants, as in every country, are very difficult to estimate.

The situation with data has always varied from country to country, usually with Oman, Bahrain and Kuwait providing reasonably reliable population and labour market data, while Saudi Arabia and Qatar revealed little or nothing (Kapiszewski 2001: 27). Since its 2005 Census, the United Arab Emirates has provided demographic and nationality data on its population (Winckler 2009a: 23). In the last few years, some of the GCC countries have collected and published far more detailed and reliable data on their native and immigrant populations, as well as on employment and unemployment. However, these still vary widely across the region, and some explication of national data availability is given below. The Secretariat of the GCC has also gone more successfully into collating and publishing national statistical data, and released for the first time a statistical yearbook (GCC 2010). The latest available national data used in this report are listed in the appendix; all are available via internet.

1.1.1. Bahrain

Bahrain was the first GCC country to hold a census, in 1941. It has also recorded births and deaths reliably since the early 1980s. Historically, employment and unemployment data in particular are thought to have been highly unreliable (Winckler 2009a: 39). Most recently, labour market data have been made available on a dedicated website, and are updated to the latest quarterly data; these data seem to be more reliable, and based on actual survey data.

Less positively, the available demographic data are not so recent, with the latest year being 2008; the labour market data, whilst very detailed in some respects (such as visa applications and awards), fail to specify any nationalities other than Bahraini or non-Bahraini, and there are no data on the educational level or skills of the workforce. There are also substantial numbers of missing data related to employment in the public sector.

1.1.2. Kuwait

Kuwait held its first census in 1957 and held one every five years until 1985, after which it was interrupted by the Iraqi invasion. The latest census was in 2005 and is regarded as complete in its coverage. By 1970, registration of births and deaths was near-universal. Since 1982, a complete civil registry covering resident nationals and foreigners, along with other population data, has existed (Winckler 2009a: 19). Recently published data include the nationality of births, and fertility data are available for Kuwaitis as well as the total population. Employment data are highly detailed for both public and private sectors, with some nationality groupings available.

On the negative side, the published population datasets include only those over 15 years, thus concealing the structure of the child population (in particular, immigrant children). There seem to be no unemployment data published, and household employment (domestic workers) data are published as merged data, thus obscuring the extent of such work. There are also no published data on public sector employment characteristics, other than crude aggregates.

1.1.3. Saudi Arabia

Saudi Arabia is viewed by most, if not all, analysts as the most problematic GCC country for both demographic and employment data. This is not through lack of data collection, but by virtue of political decisions. Winckler (2009a: 23–31) discusses at length the inconsistencies and apparent manipulations of demographic data prior to the 2004 Census. Similarly, unemployment data as recently as 2004/5 recorded levels of around 7 per cent, while unofficial sources estimated rates as high as 20–30 per cent, thus raising doubts about the reliability of official data (Winckler 2009a: 38).

The data available currently indicate major improvements, following on from the real progress made with the 2004 Census. There are annual demographic surveys made, which seem to be of a high standard. Still-missing data include the fertility rates of Saudi women, and there are limited details of public sector employment and no information about the actual

nationalities of immigrants. There is also a deficit of information on the population under 15 years, along with presentation of misleading total unemployment and activity rates (as with total fertility rates) which do not distinguish between the Saudi and immigrant populations. (The actual rates can, however, be calculated from existing datasets.)

1.1.4. The United Arab Emirates

Although the first census was carried out in 1968 (when under British control), it was not until the last census in 2005 that the UAE disaggregated its published data into its national and foreign components. Thus, earlier data such as fertility and mortality rates were for the total population, and the characteristics of the national population were unknown. Since 2005, the authorities have continued to provide up-to-date employment data disaggregated by national/foreign components, but currently there seem to be no demographic data later than 2005. Uniquely in the GCC, the UAE has published data on the duration of residence of its immigrant population, compiled from the 2005 Census. Employment data are fairly meagre; although native/migrant activity and unemployment rates are provided, more detailed data are not available. Gender data are largely missing, and sectoral employment data use percentage breakdown, requiring recalculation of figures to use the data. Employment data for the Emirate of Dubai, derived from labour force surveys carried out by the Dubai Statistics Centre, are of a much higher quality but cover only about a third of the UAE population.

1.1.5. Qatar

Qatar's first census was conducted in 1970, followed by another in 1986. Consistently, Qatar's censuses have not only had substantial failings in the enumeration of data, but also concealed the extent of the immigrant population (Winckler 2009a: 21). Problems with the recording of births, deaths and other demographic data seem to have been solved since the early 1980s, but the authorities have not published the disaggregated data. This pattern of suppression of data on the national/immigrant distinction has been maintained even with the 2010 Census, whose provisional results again give only total population data. Similarly, there are no data on national patterns of fertility, birth or mortality. Given that Qatar has the highest ratio of immigrants in its population, this deficit is a serious one.

Employment data are better. The data distinguish between Qataris and foreign workers (but without giving actual nationalities). Data derived from the 2009 labour force survey and made available by the Qatar Statistics Authority contain no information about unemployment, but do have details on employment by sector and economic activity,

disaggregated by gender and national/foreign citizenship. They also give the population over the age of 15 years, distinguishing between nationals and foreigners. The 2007 survey, published online, is far superior in its coverage, and actually provides unemployment data broken down by age group, gender and national/foreign citizenship. There is also good coverage of public and private sector employment.

1.1.6. Oman

Oman conducted its first census as late as 1993, although data started to improve from the late 1970s (Winckler 2009a: 20). Thus, Oman has the shortest history of population censuses not only in the GCC but also across the Arab world. Since its 1993 Census, Oman has been the only GCC country publishing annual data on national fertility and mortality rates, along with population data on its foreign residents. The most recent data available are for 2008, and include disaggregated birth and death rates, along with population growth. However, the quality of some of the data is doubtful, since there are observable discrepancies and rather too low foreign population figures (at only slightly more than the immigrant labour force). Employment data are less detailed, although with information on government new hirings and terminations. Some datasets (such as the civil service employees in 2006/7/8) provide actual nationalities; there are also 2004 and 2008 datasets with total foreign employees by principal nationalities. This is unique in the GCC area. Missing are data on unemployment and participation rates and more detailed information on private sector employment, although this may reflect a lack of data collection rather than a political decision to suppress data.

1.2. Some conclusions on data availability

Recent years have seen some improvement in the collection and publication of demographic and employment-related data, partly through the increasing recognition by governments that such information is vital for the good management of their very large immigrant populations and workforces. Overall, structural-historical patterns seem to prevail, with the two countries possessing the longest traditions in data collections (Bahrain and Kuwait) providing reasonable-quality data in both areas. However, both seem to suppress public sector employment data actively. Saudi Arabia has emerged from its previous history as the problematic case, although clearly there remain some issues of data suppression and data management. The UAE has similar issues of trying to manage its data, for socio-political reasons, but Dubai possesses high-quality data on its working-age population and employment. Qatar is able to provide high-quality employment data, and is thought to

Table 1. *Summary of data availability and quality in the GCC*

	Censuses		Data availability and quality[a]	
	First	Latest	Demographics	Employment
Bahrain	1941	2001	***	***
Kuwait	1957	2005	***	***
Saudi Arabia	1962	2004	**	***
UAE	1968	2005	**	**
Qatar	1970	2010	*	****
Oman	1993	2004	***	**

[a] Own assessment based on literature survey and preceding analysis.

possess similar high-quality demographic data which are suppressed. Thus, Qatar remains the only GCC country with strong political control of its data availability. It is also the country with the highest proportion of immigrants in the GCC, and probably in the world, estimated for 2010 at around 87 per cent. Oman, as the last country to initiate census-taking, might be expected to be the weakest in its data: to some extent, this is true of detailed employment data, and some demographic data are as old as 2004. However, in many cases the availability of the data compensates for the lack of detail or timeliness.

Table 1 summarizes the availability and quality of data, albeit in a subjective form in the absence of detailed criteria for evaluation.

2. POPULATION AND EMPLOYMENT IN THE GCC COUNTRIES

2.1. Evolution of the GCC labour force

Prior to the development of the oil sector as the primary source of income for the GCC countries, there were relatively few foreigners in the agrarian and nomadic populations of the region. Oil was discovered in Bahrain in 1932, then in Saudi Arabia in 1938, subsequently in Kuwait, Qatar and the UAE, and most recently in Oman in 1967 (Winckler 2009a: 130). Early oil exploitation was severely restricted by political and legal factors (e.g. the British control over Kuwait); by the global oligopoly of only three major oil companies, which had agreed amongst themselves not to develop within the former Ottoman Empire unless every partner consented; and also by the inexperience of Middle Eastern countries which tended to deal with only one oil company (Tétreault 2008: 256–8). Nevertheless, even with the small-scale oil industry of the time, there was heavy demand from the growing construction sector, government bureaucracy and consumer markets. Thus, by 1957 foreigners made up 45 per cent of Kuwait's total population, and by 1965 this had reached 53 per cent (Winckler 1998:

15). By the early 1970s – before the oil boom – the total number of foreigners in the GCC was estimated at 800,000 to 1.25 million (Winckler 2009a: 130).

Subsequent to the oil shocks of 1973–4 and the accompanying oil boom, labour immigration increased such that by 1975 the region's foreign population had climbed to 2.76 million (of which 1.4m were workers) – more than doubling in just a few years (Winckler 2009a: 135). A conscious decision had been made by political elites not to educate and train native workforces for economic development since this would take a great deal of time, but to facilitate rapid construction and development of infrastructure by means of short-term labour immigration (Dito 2010: 72). Thus, from 1975 to 1985 the GCC countries had an average labour force growth of 7.7 per cent a year, with Bahrain at 10.5 per cent. The non-national labour force grew at an average rate of 13 per cent, reaching 15 per cent in Bahrain and 17 per cent in Saudi Arabia, while the foreign proportion of the total labour force went up from 39 to 67 per cent in 1985 (World Bank 2004: 58).

Declining oil prices resulted in reduced labour demand in the latter half of the 1980s, but this merely slowed down the growth in absolute numbers of contract workers. Large numbers of nationals started to appear on the labour market in some GCC countries – most notably, in Saudi Arabia – resulting in a decline in the ratio of immigrant to native workforce for Saudi Arabia, from 65 per cent of the workforce down to 50 per cent in 2008. There have also been significant declines in the immigrant proportions in Kuwait and the UAE. However, in Qatar and Bahrain there have been massive increases in the ratio – from 87 to 94 per cent for Qatar, and from 63 to 76 per cent for Bahrain over the last decade.

In no GCC country did the overall trend of increasing absolute numbers of the non-national labour force disappear, although individual years show some small dips and peaks. Over the last decade for which data are available (1999–2008), the number of migrant workers trebled in Qatar and more than doubled in Bahrain and the UAE. According to these latest data, the proportion of foreigners in the labour forces of the GCC countries ranges from 50 per cent in Saudi Arabia to 94 per cent in Qatar.

Table 2 gives the values of native and foreign components of the GCC labour forces, along with foreign proportion of the labour force, for various years. Figure 1 shows these in graphical form.

Data on the gender of the migrant workforce have rarely been made available; recently this has changed and data for 2008 are shown in the table. As can be seen, the proportions of women in the foreign labour forces are very low – ranging from 8 per cent in

**Table 2.** *Native and foreign components of GCC labour forces, 1975–2008 (000s)*

		1975	1985	1990	1999	2008[a]	% female in 2008
Saudi Arabia	Nationals	1,027	1,440	1,934	3,173	4,173	16
	Foreigners	773	2,662	2,878	4,003	4,282	14
	Total	*1,800*	*4,102*	*4,812*	*7,176*	*8,455*	*15*
	% foreigners	42.9	64.9	59.8	55.8	50.6	
Kuwait	Nationals	92	126	118	221	351	46
	Foreigners	213	544	731	1,005	1,742	23
	Total	*305*	*670*	*849*	*1,226*	*2,093*	*27*
	% foreigners	69.8	81.2	86.1	82.0	83.2	
Bahrain	Nationals	46	73	127	113	139	33
	Foreigners	30	101	132	194	458	17
	Total	*76*	*174*	*259*	*307*	*597*	*20*
	% foreigners	39.5	58.0	51.0	63.2	76.7	
Oman	Nationals	137	167	189	312	276	n.d.
	Foreigners	71	300	442	503	809	n.d.
	Total	*208*	*467*	*631*	*815*	*1,169*	n.d.
	% foreigners	34.1	64.2	70.0	61.7	74.6	
Qatar	Nationals	13	18	21	36	72	36
	Foreigners	54	156	230	244	1,193	8
	Total	*67*	*174*	*251*	*280*	*1,265*	*10*
	% foreigners	80.6	89.7	91.6	87.1	94.3	
UAE	Nationals	45	72	96	124	455	22
	Foreigners	252	612	805	1,165	2,588	13
	Total	*297*	*684*	*901*	*1,289*	*3,043*	*14*
	% foreigners	84.8	89.5	89.3	90.4	85.0	
TOTALS	Nationals	1,360	1,896	2,485	3,979	5,466	
	Foreigners	1,393	4,375	5,218	7,114	11.072	
	Total	*2,753*	*6,271*	*7,703*	*11,093*	*16,538*	
	% foreigners	50.6	69.8	67.7	64.1	66.9	

Sources: Winckler (2010); national statistical datasets (see appendix).
[a] 2009 data for Kuwait; 2010 data for Bahrain (employed only); 2006 data for UAE female rates.

Qatar to 23 per cent in Kuwait. Qatar includes domestic workers in the employment data, so these seem to be a clear indicator of the heavily biased gender ratio of immigrant workers across the GCC. In fact, the proportions of women in the native labour forces are much higher, ranging from 16 per cent in Saudi Arabia to 46 per cent in Kuwait.

Figure 1. *Native and foreign components of GCC labour forces, 1975–2008 (000s)*
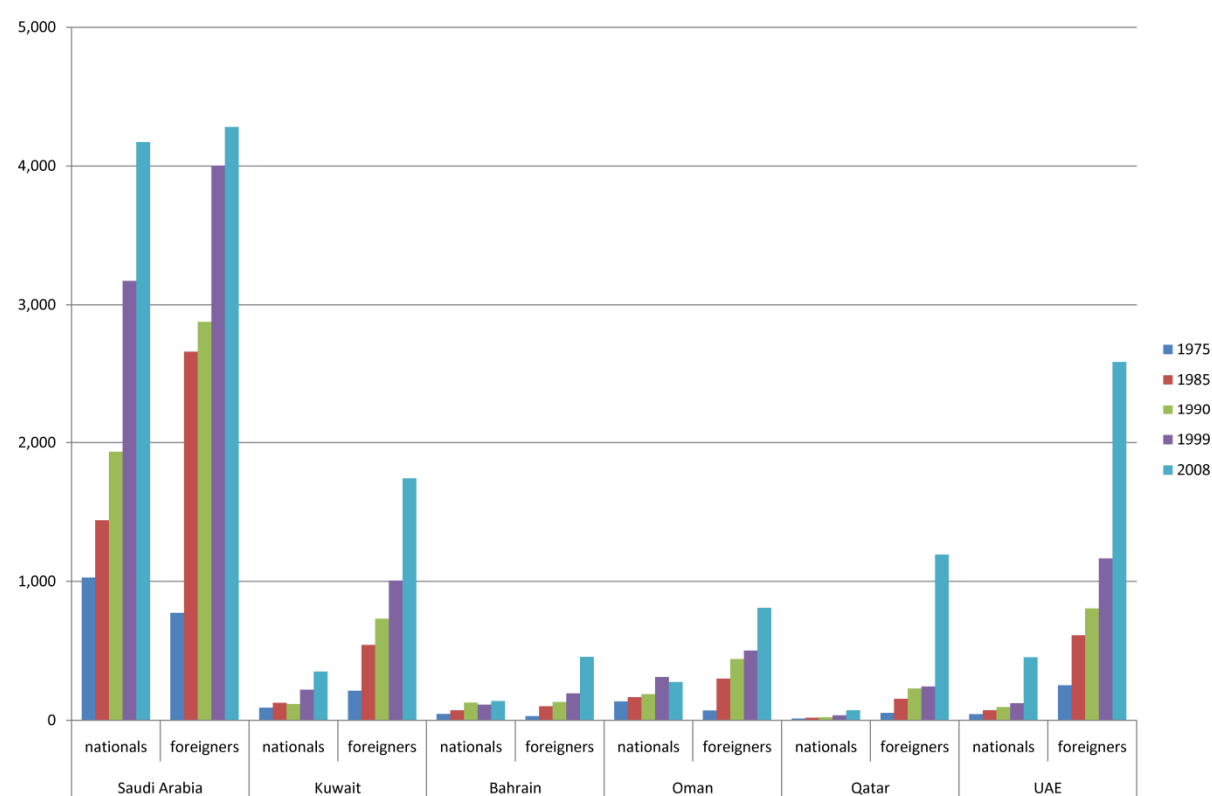
Sources: As for Table 2.

The total number of resident immigrants (that is, including those outside of the formal labour market) is quite a bit higher in some GCC countries, although as a proportion of total population it is lower. Table 3 shows the trend in migrants as a proportion of total population from 1975 to 2008.

As is clearly shown, there is a long-term trend of significantly increased migrant numbers in all GCC countries other than Saudi Arabia, which actually has a small decline in

Table 3. *Evolution of foreign component of total population in the GCC, 1975–2008 (%)*

	1975	1985	1997	2008
Saudi Arabia	25	23	31	27
Kuwait	52	60	66	68
Bahrain	21	35	39	51
Oman	17	22	28	31
Qatar	59	60	67	87
UAE	70	79	76	81

Sources: 1975, 1985, 1997 data from Kapiszewski (2001: Table 1.6); 2008 data calculated from national datasets (see appendix) and GCC (2010).

Table 4. *Labour force and total population in the GCC, c. 2008 (000s)*

		Labour force[a]	Population		Foreign population not in the labour force	Year
			M+F	F		
Saudi Arabia	Nationals	4,173	18,116	9,024		2008
	Foreigners	4,282	6,692	2,090	2,410	
	Total	*8,455*	*24,807*	*11,114*		
	% foreigners	50.6%	27.0%	18.8%		
Kuwait	Nationals	351	1,119	571		2009
	Foreigners	1,742	2,366	774	624	
	Total	*2,093*	*3,485*	*1,345*		
	% foreigners	83.2%	67.9%	57.5%		
Bahrain	Nationals	139	538	266		2008
	Foreigners	458	569	162	111	
	Total	*597*	*1,107*	*429*		
	% foreigners	76.7%	51.4%	37.8%		
Oman	Nationals	276	1,967	973		2008
	Foreigners	809	900	207	91	
	Total	*1,085*	*2,867*	*1,180*		
	% foreigners	74.6%	31.4%	17.5%		
Qatar	Nationals	72	*220*	??		2010[b]
	Foreigners	1,193	1,477	??	284	
	Total	*1,265*	*1,697*	*412*		
	% foreigners	94.3%	87.0%			
UAE	Nationals	455	892	439		2008
	Foreigners	2,588	3,873	1,040	1,285	
	Total	*3,043*	*4,765*	*1,479*		
	% foreigners	85.0%	81.3%	80.0%		
TOTALS	Nationals	5,466	22,852			
	Foreigners	11,072	15,877		4,805	
	Total	*16,538*	*38,728*	*15,780*		
	% foreigners	66.9%	41.0%			

Sources: GCC (2010: Table 1); national data (see appendix).

[a] 2008 data, except for Kuwait (2009) and Bahrain (2010).
[b] The 2010 foreign population estimate for Qatar is that made by the Economist Intelligence Unit (EIU).

recent years that include an oil boom. The proportion of migrants to total population varies widely, from around 30 per cent in Saudi Arabia and Oman to 87 per cent in Qatar and totalling 41 per cent for the GCC.

Table 4 shows the latest available data for native, immigrant and total populations by gender, along with labour force data. Comparing these foreign population data with the

labour force data, there is no consistent pattern. Qatar and the UAE have a very high total immigrant population which is slightly lower than their labour market proportions; Oman and Saudi Arabia are very low. These figures are partially explained by the participation rates of the native population, which are low for Saudi Arabia and Oman (see section 2.2.1 below). We should also note the fairly large number of resident migrants outside of the workforce – 4.8 million across the GCC, with 2.4 million in Saudi Arabia. Some of these are children; others are women, as evidenced by the rather low participation rates of migrant women. These data attest to the importance of family units in the migrant population – as opposed to the image presented by governments of primarily unaccompanied temporary workers. (See section 2.3.3 below.)

2.2. Characteristics of the GCC labour markets

The GCC countries, as labour-importing, resource-rich economies, share a number of structural similarities. There are also some important differences, however. The more or less common features are the following:

- low total participation and employment rates of nationals;
- extreme segmentation of the labour market – especially public/private and national/immigrant worker;
- rising unemployment rates, especially of women and the young;
- employment dominated by services and construction; female employment almost exclusively in services, notably housekeeping for migrant women, education and social services for native women;
- the importance of the *kafala*, or sponsorship system, for a flexible stock of 'temporary' foreign labour (which in reality is more permanent).

These issues are addressed separately, below.

2.2.1. Low total participation and employment rates of nationals

Older data for total participation rates of nationals in the GCC (i.e. for both sexes) put the range as 20–3 per cent in 1975, 17–25 per cent in 1985 and 16–27 per cent in 1997 (Kapiszewski 2001: 75). The total rate for the GCC area actually declined throughout the period 1975–97, with Bahrain and Kuwait as notable exceptions to the trend.

More recent data, from international agencies such as the ILO or World Bank, do not provide separate participation rates of nationals and migrant workers. The total combined

Table 5. *Labour force participation rates (15+) in the GCC, c. 2008, by gender and citizenship category (%)*

	M+F	M	F	
Saudi Arabia				
2008	36.3	61.0	**11.5**	*Nationals*
	79.9	**94.2**	40.8	*Immigrants*
	50.2	74.4	17.4	*Total*
Kuwait				
2009	51.1	58.2	44.8	*Nationals*
	84.7	**93.8**	63.8	*Immigrants*
	76.3	87.2	56.9	*Total*
Qatar				
2008	49.3	63.0	35.6	*Nationals*
	92.1	**98.3**	54.1	*Immigrants*
	87.7	96.1	48.8	*Total*
UAE				
2008	45.6	63.0	**28.2**	*Nationals*
	79.2	**94.1**	47.1	*Immigrants*
	72.6	89.4	41.8	*Total*

Source: Own calculations from national data (see appendix).

Note: some published national data for total participation rates are inconsistent with these calculated data. There is no obvious reason for the discrepancies.

rates are rather high – between 56 and 81 per cent in 2008 – since they incorporate the very high numbers of migrant workers in the labour force calculations.

Table 5 shows rates calculated for those countries where labour market and population data are available separately by gender and national/immigrant citizenship. The data show an approximate doubling of the participation rates of nationals in the four countries for which the data are available (Saudi Arabia, Kuwait, Qatar and the UAE) since 1997. This reflects the far greater participation of young male nationals, rather than of female nationals, whose participation rate remains very low in Saudi Arabia (12 per cent) and the UAE (28 per cent), although rather higher in Qatar and Kuwait.

Male immigrant rates are extremely high (94–8 per cent) and female immigrant rates are rather higher than those for female nationals, but fairly low at 41–64 per cent across these four countries. The low female migrant participation rates are consistent with the evidence in Table 4 above, and with the large number of resident immigrants outside of the labour market. These are almost entirely women.

The ILO has produced some limited data on the separate employment rates of nationals and migrants in four GCC countries. These are reproduced in Table 6.

Table 6. *Employment rates of nationals and migrants in the GCC, 2007–8 (%)*

	Nationals	Migrants
Bahrain	26.4	73.6
Kuwait	n.d	n.d.
Oman	22.3	77.3
Qatar	7.5	92.5
Saudi Arabia	13.3	86.7
UAE	n.d	n.d

Source: ILO (2009: Table 3).

Unfortunately, these data are not broken down by gender (as well as missing Kuwait and the UAE). It should also be borne in mind that these are employment, not participation, rates: thus they exclude the unemployed who appear in the participation rates. (This is not so important for the migrant rates.) Qatar and Saudi Arabia show extraordinarily low employment rates of their nationals – alongside very high rates for their resident migrants. Comparing the data with Table 5, the employment and participation rates for immigrants in Saudi Arabia and Qatar are very similar (as expected); for nationals, the employment rates are well below the participation rates – 7.5 per cent compared with 49 per cent in Qatar, and 13.3 per cent compared with 36 per cent in Saudi Arabia. The difference is the unemployment level, especially affecting women. Table 6 provides data on two countries missing from Table 5 – namely, Bahrain and Oman. These two countries have relatively high employment rates for their nationals, yet fairly low employment rates for their immigrants (at 74 per cent and 77 per cent). This is somewhat surprising and suggests either high unemployment of immigrant workers in these two countries, or else extensive participation in the informal economy.

2.2.2. Extreme segmentation of the labour market

Throughout the Middle East and Northern Africa (MENA) region, there is a problematic legacy of state intervention in the economy dating back to the 1950s and 1960s: after nationalization of major assets and direct control of economic production, the public sector emerged as the primary locus of employment (World Bank 2008: 225). Even today, the public sector is the desired employer owing to high wages, job security, social allowances and generous retirement benefits.[2] Furthermore, the public sector has shorter working hours than the private sector – allowing civil servants to run other 'businesses' on the side – and promotion within it is based on seniority more than performance (IMF 2004: 7). By the early

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[2] In GCC countries, workers can retire with full benefits after twenty years of service, and pension fund contributions range from 0 to 5 per cent (IMF 2004: 7).

Table 7. *Public sector employment as a share of total employment of nationals in the GCC (%)*

	c. 1990	*c.* 2000	2006	2008	2009	2010
Bahrain	68	80	38	29	n.d.	34
Kuwait	42	75	87	86	n.d.	n.d.
Oman	76	n.d.	50	47	n.d.	n.d.
Saudi Arabia	70	82	73	72	n.d.	n.d.
Qatar	n.d.	n.d.	89	88	87	n.d.

Sources: World Bank (2004: Figure 4.6); Shah (2008: Table 7); for 2006–10, own calculations from national data and GCC (2010).

2000s, over 60 per cent of the national labour forces were employed in the public sector in the GCC (excluding Bahrain and Saudi Arabia), whereas traditionally GCC governments have employed as much as 90 per cent of these forces in the public sector (Al-Kibsi et al. 2007: 20). In particular, Kuwait and the UAE have small working-age populations that rely almost exclusively on government jobs; Saudi Arabia has a larger share of nationals in the labour force along with their greater presence in the private sector (World Bank 2004: 96).

Table 7 gives some data on employment of nationals in the public sector in the GCC countries. These show an increasing reliance on public sector employment for GCC nationals over the 1990s but a clear decline since 2000 for Bahrain, Saudi Arabia and Oman. On the other hand, Kuwaiti nationals are increasingly reliant on the public sector, while Qatar has been consistently the most dependent, according to available data. No data seem to be available from any sources for the UAE.

In contrast to native workers, the great majority of migrants are employed in the private sector. They are preferred over native workers because their wages are much lower (except for high-skilled jobs), they are better trained, and their hiring arrangements are more flexible (IMF 2004: 8). This overlaying of the national/migrant distinction with the public/private sectors has had the effect of reinforcing the segmentation, resulting in extreme disparities between employment in the two sectors. In terms of skilled work, generally the local workers lack the required technical skills to perform the tasks required. Indigenous education has barely changed over decades, maintaining traditional religious doctrines; university graduates rarely attain the necessary skills, with studies in the humanities and social sciences. For unskilled work, a 'race to the bottom' for very low wages[3] has been the

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[3] According to the ILO (2009: 4), in Bahrain in 2007 the average migrant monthly wages were 168BD (US$445) with wages as low as 58BD (agriculture) and 108BD (hotels/restaurants), while no native worker earned less than 200BD, with an average wage of 507BD.

result of almost unlimited supplies of unskilled and semi-skilled labour from other MENA countries and Asia. Cultural barriers also tend to exclude nationals from jobs in the service sector, in that jobs such as taxi-drivers, food-service clerks and all forms of household work are considered to be the domain of foreigners (Shaham 2009: 2).

Table 8 gives data on the distribution of employment in 2003 in the private sector. In three countries (Kuwait, Qatar and the UAE), the private sector was almost entirely staffed by immigrant workers. In Oman and Saudi Arabia, private sector employment was roughly 50 per cent held by immigrant workers, and in Bahrain about 70 per cent.

Table 9 gives more comprehensive data on employment in the public and private sectors in 2008 for five GCC countries, with calculations derived from data recently made available (GCC 2010). Many important structural differences and similarities can be identified from these data and the calculated changes from 2006. These are identified below.

State employment as a share of total employment is lowest in Bahrain (at 8 per cent) and highest in Saudi Arabia (35 per cent), with major decreases in the share since 2006 in Qatar, Bahrain and Oman. However, the decrease in share occurred through massive increases in private sector employment, as opposed to reduced state sector employment. Qatar, for example, has an increase of 35 per cent state employment over that period.

Private sector employment grew phenomenally over this oil boom period, with employment increases in Qatar of 140 per cent, in Oman of 51 per cent and 43 per cent in Bahrain. Employment increases in both the private and public sectors were more modest in Saudi Arabia and Kuwait – below 15 per cent.

Table 8. *Share of national workers in private sector employment in the GCC, 2003*

	Total all workers (000s)	% nationals
Oman	158	48
Saudi Arabia	4,315	46
Bahrain	254	30
Kuwait	1,071	3
Qatar	252	3
UAE	99	1

Source: Al-Kibsi et al. (2007: Exhibit 1).

Table 9. *Employment in the public and private sectors in the GCC, 2008 and % changes from 2006, by gender and citizenship type (000s)*

		Kuwait	% change from 2006	Qatar	% change from 2006	Oman	% change from 2006	Saudi Arabia	% change from 2006	Bahrain	% change from 2006
STATE	**Total**	**268.1**	*12.5*	**141.3**	*35.4*	**153.5**	*10.6*	**2,811.1**	*3.2*	**39.2**	*2.0*
	Female	130.5	*16.6*	43.4	*52.9*	53.4	*15.1*	446.6	*-3.1*	17.9	*7.5*
	% female	*48.7*	*3.6*	*30.7*	*12.9*	*34.8*	*4.1*	*15.9*	*-6.1*	*45.8*	*5.4*
	Immigrants	68.5	*14.0*	81.8	*55.8*	22.3	*-1.9*	148.0	*-34.4*	5.0	*26.5*
	% migrants	*25.6*	*1.4*	*57.9*	*15.0*	*14.5*	*-11.3*	*5.3*	*-36.4*	*12.8*	*24.1*
PRIVATE	**Total**	**1,181.0**	*14.3*	**1,026.8**	*140.4*	**942.1**	*50.7*	**5,145.8**	*7.2*	**428.4**	*43.1*
	Female	88.7	*23.7*	79.5	*62.2*	104.9	*33.4*	673.0	*12.0*	41.0	*48.7*
	% female	*7.5*	*8.2*	*7.7*	*-32.5*	*11.1*	*-11.5*	*13.1*	*4.5*	*9.6*	*3.9*
	Immigrants	1,149.3	*13.8*	1,018.6	*142.2*	794.9	*55.7*	4,130.2	*6.8*	346.4	*43.2*
	% migrants	*97.3*	*-0.5*	*99.2*	*0.8*	*84.4*	*3.3*	*80.3*	*-0.4*	*80.9*	*0.1*
State employment as % of total employment		**18.5**	*-1.3*	**12.1**	*-38.4*	**14.0**	*-22.9*	**35.3**	*-2.4*	**8.4**	*-26.3*

Source: Own calculations from GCC (2010: Table 6).

Female employment in the state sector ranges widely, from just under 50 per cent in Kuwait and Bahrain, through just over 30 per cent in Qatar and Oman, down to a low of 16 per cent in Saudi Arabia. Migrant employment in the state sector ranges from 5 per cent in Saudi Arabia to 58 per cent in Qatar. There is no clear pattern, such as smaller countries needing more immigrant state employees: for example, Bahrain has only 13 per cent. There are three clear patterns in trends, however. Qatar increased massively both its female and immigrant employment (by 53 per cent and 56 per cent), along with Kuwait and Bahrain with smaller but important increases. Saudi Arabia cut massively its immigrant employment (by 36 per cent) and slightly its female employment (3 per cent), while Oman increased its female employment by 15 per cent and cut its immigrant employment by 11 per cent.

In the private sector, the proportion of migrants ranges from 99 per cent in Qatar and 97 per cent in Kuwait to just over 80 per cent in the other countries. Over 2006–8 there were massive increases in immigrant employment in Qatar (142 per cent), Oman (56 per cent) and Bahrain (43 per cent) alongside more modest increases in Kuwait and Saudi Arabia. However, the ratio of immigrants in this sector remained roughly constant across the GCC (with small decreases in Saudi Arabia and Kuwait), showing that employment growth benefited nationals as much as immigrants. Comparing Table 9 with the older 2003 data in Table 8, there appears to be a major increase in the immigrant employment ratios in Saudi Arabia and Oman – from just over 50 per cent to just over 80 per cent. (There may be a data comparability problem, since the 2003 data are unsourced.) There is also a small increase in Bahrain, from 70 per cent to 81 per cent, while Kuwait and Qatar remain at just under 100 per cent.

However, labour market segmentation is not confined to the two conjoined parameters of public–private and native–immigrant: there exist at least two other strong segmentations, of gendered employment and informal employment. The gender segmentation also tends to reinforce the public–private and native–immigrant segmentation. In particular, the very limited amount of female employment (in the services sector) is split between highly paid civil service posts for nationals and private household employment for migrant women. Informal employment is poorly researched and very little is known about it. However, there is an extensive informal sector and presence of irregular migrants in most of the GCC. This is discussed in more detail in section 3.2 below.

2.2.3. Rising unemployment rates

Data on unemployed nationals in the GCC countries are difficult to find, and even their interpretation is difficult when voluntary unemployment is chosen as a strategy until privileged work is found in the public sector. Examination of the government statistics on unemployment reveals that there is often no recognition of internationally standardized criteria for the measurement of unemployment, and 'bogus' (extremely low) unemployment rates are sometimes published.

Over the last decade, increasingly more young people have appeared on the labour market and the public sector has been unable to absorb them; consequently, open unemployment rates have increased and are predicted to increase further. Al-Kibsi et al. (2007) gives the overall unemployment rate of GCC nationals in 2002 as 11–12 per cent; Shaham (2009) cites a rate of 15 per cent for the UAE in 2003; and Dito (2007) gives a Labour Force Survey figure of 18.5 per cent in 2004 for Bahrain. Older predictions for 2013 – made before global recession – estimate the GCC rate as being in the order of 18–25 per cent (Al-Kibsi et al. 2007). Unofficial sources put the youth (16–24) unemployment rates for Bahrain, Oman and Saudi Arabia at over 35 per cent (Al-Kibsi et al. 2007: 22).

Although almost no data are published, it is now possible to calculate the unemployment rates for some GCC countries, broken down by gender and national/foreign citizenship. Table 10 gives such calculations for three countries, along with published data for the UAE.

Table 10. *Unemployment rates in the GCC, 2008, by gender and citizenship (%)*

	M+F	M	F	
Saudi Arabia	10.0	6.8	26.9	*Nationals*
	0.5	0.5	0.7	*Foreigners*
	5.2	3.6	14.5	*Total*
Qatar	3.2	1.7	5.9	*Nationals*
	0.3	0.1	1.7	*Foreigners*
	0.5	0.2	2.6	*Total*
UAE[a]	13.8	n.d.	n.d.	*Nationals*
	2.6	n.d.	n.d.	*Foreigners*
	4.0	2.0	12.0	*Total*
Kuwait	3.6	3.1	4.2	*Nationals*
	1.2	0.8	2.8	*Foreigners*
	1.6	1.1	3.2	*Total*

Source: Own calculations from national datasets.
[a] UAE data as published (LFS 2008).

According to these latest data, which precede the global economic crisis, the total unemployment rates for nationals are 14 per cent in the UAE and 10 per cent in Saudi Arabia, with Qatar and Kuwait doing much better at just over 3 per cent. The unemployment rates for foreigners are negligible, as expected. Looking more closely, the rate for female nationals in Saudi Arabia is very high, at 27 per cent; such data are not available for the UAE, but judging from the total female rate of 12 per cent, the female nationals' rate should be slightly lower than for Saudi Arabia. The female nationals' rate is only 6 per cent for Qatar, and is even lower at 4 per cent in Kuwait. Calculations by age group have been possible only for Saudi Arabia and Kuwait. These are given in Tables 11 and 12.

From Table 10, we can see that even though the total unemployment rate for Saudi nationals is only 10 per cent, for males under 24 years it is considerably higher (between 29 and 56 per cent) and for women under 24 it is around 70 per cent. For women aged 25–9 it is also very high at 42 per cent. Only over the age of 30, for both sexes, is the unemployment rate at an acceptable level – i.e. under 10 per cent.

Table 11. *Unemployment rates of Saudi nationals, 2008, by gender and age group (%)*

Age (years)	M+F	M	F
15–19	57.1	56.4	66.7
20–24	38.4	29.3	72.0
25–29	17.7	10.6	41.6
30–34	4.4	3.3	9.0

Source: Own calculations from national data.

Table 12. *Unemployment rates of Kuwaiti nationals, 2009, by gender and age group (%)*

Age (years)	M+F	M	F
15–19	6.2	6.4	62.5
20–24	10.8	9.8	12.2
25–29	5.0	3.3	6.8
30–34	1.9	1.1	2.8

Source: Own calculations from national data.

The Kuwaiti data, in Table 12, show a much less pronounced phenomenon of unemployment affecting the young. Although the teenage female rate is very high, this is a very small number of people. For the age group 20–4, women are the most hit by unemployment at 12 per cent, but this bears no comparison with the picture in Saudi Arabia. We should also bear in mind that the participation rates for women are high in Kuwait, in contrast to the very low rates in Saudi Arabia, meaning that the employment rate is very high in Kuwait. Thus we can say, even from the detailed data, that Kuwait appears not to have a particular problem with unemployment of its workforce.

Figure 2 shows the structure of unemployment by educational level and gender for recent years in four GCC countries. A typical pattern is of high unemployment of female graduates, and this is seen in three of the countries. Examination of the levels of recorded unemployment shows great gender disparity, with total female levels several times that of male levels in all GCC countries. This is despite the very low female participation rates. In GCC countries where data are available by age group, the most affected groups are either aged 25–34 or younger: to some extent, demographic structure dictates which age group is most likely to be unemployed.

Figure 2. *Structure of total unemployment by educational level and gender*
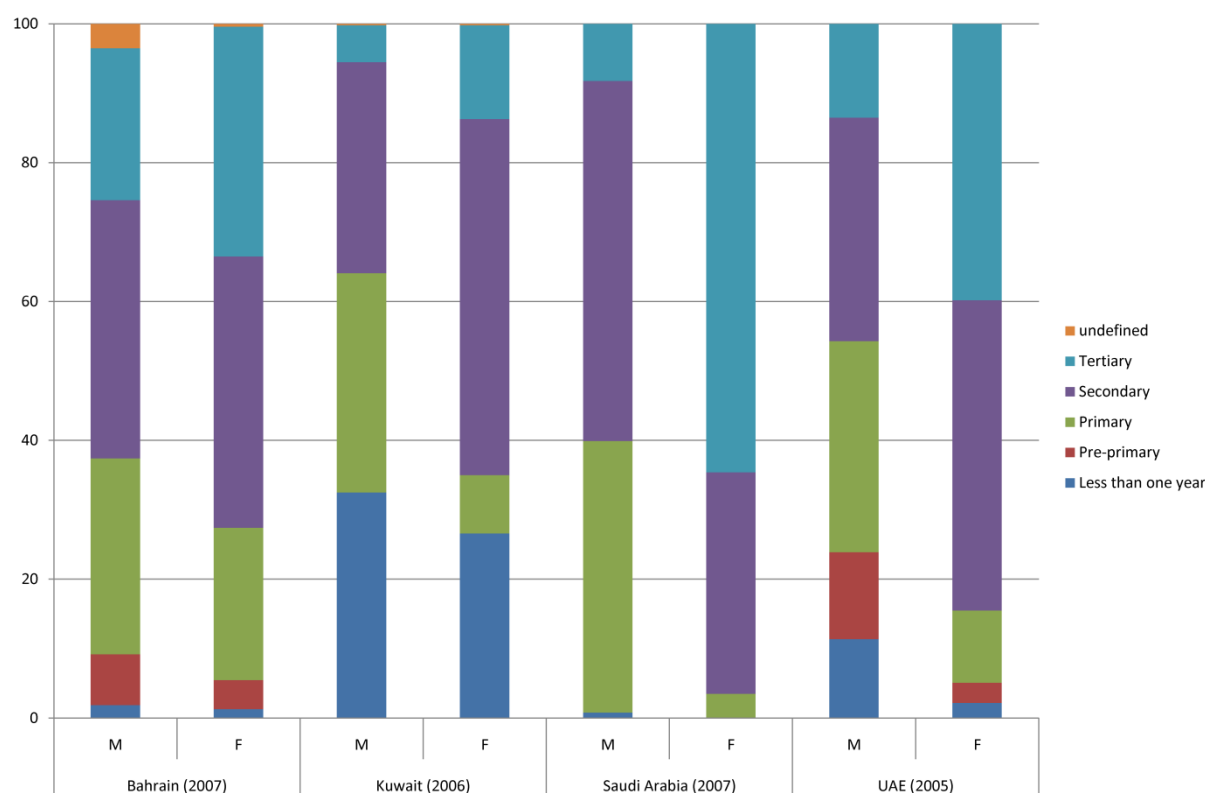
Source: Own calculations using ILO-KILM database.

2.2.4. Employment by sector

Detailed employment data on natives and immigrants have been difficult to acquire – if indeed they even existed – until recently. Even now, there are serious data deficits, manipulations and inconsistencies. Table 13 shows available data for Bahrain, Kuwait, Qatar, Saudi Arabia and the UAE. There are no data available for total employment by sector for Oman, although there are for immigrants in the private sector. The data provided by Bahrain are incomplete, since they total 382,000 whereas other sources give a total of 467,000 for the same year. Bahrain omits employment in five important sectors, and Kuwait omits information for three sectors: all or most of these omitted sectors are state employment. Kuwait also merges several sectors, thus making its data non-comparable as well as obscuring high migrant presence in individual sectors. Thus, these three countries provide defective data on employment by economic sector. The UAE also conceals actual data by providing only a percentage breakdown of the importance of each sector for total employment and immigrant employment: it has proven necessary to track down separately the total employment figures and calculate the nominal data from these, in order to calculate the real extent of migrant workers by sector.

With these caveats, Table 13 shows some important patterns of employment and of immigrant proportion by economic sector. Qatar's most important economic sector for employment in 2009 was construction, at 44 per cent of total employment. Immigrants made up nearly 100 per cent of construction workers. Bahrain was the only other country with construction as its primary employment activity, but given the missing data this may not be correct. Saudi Arabia shows public administration as its biggest employment sector at 19 per cent, closely followed by wholesale and retail at 17 per cent. The former has only 2 per cent immigrant workers, the latter 80 per cent. The UAE shows a similar pattern to Saudi Arabia, along with the importance of domestic workers. Thus, the leading employment sector is wholesale and retail, followed by housekeeping and then public administration. Immigrant presence is just under 95 per cent in the first and last, and rather high at 45 per cent in public administration. The Kuwaiti figures are impossible to interpret owing to combined and missing sectors. The same is true (and worse) for Bahrain.

Looking at migrant presence by sector, the data are more revealing. Although total migrant presence is between 80 per cent and 94 per cent excepting Saudi Arabia at 53 per cent, most sectors are dominated by immigrant workers. Bahrain has only two small sectors with migrant presence under 50 per cent – agriculture and financial services. Kuwait has only utilities (at 17 per cent), all others ranging from 72 per cent to 99 per cent. Qatar has only

22

Table 13. *Total and foreign employment by economic sector in the GCC, 2009[a], by % of employment and foreign worker proportion*

Economic sector	Bahrain[b]		Kuwait		Qatar		Saudi Arabia		UAE[c]	
	% of total employment	% foreign workers	% of total employment	% foreign workers	% of total employment	% foreign workers	% of total employment	% foreign workers	% of total employment	% foreign workers
Agriculture and fishing	1.2	46.5	1.8	99.2	1.6	100.0	3.8	66.1	3.8	91.8
Mining and quarrying	-----	-----	0.3	26.5	5.0	91.8	1.3	8.5	2.0	80.8
Manufacturing	17.2	75.1	5.6	92.6	8.6	99.2	6.5	76.2	7.7	93.9
Electricity, gas and water	-----	-----	0.6	17.1	0.5	66.6	1.0	27.3	1.1	77.3
Construction	32.8	89.8	8.1	95.2	44.3	99.8	12.8	91.0	12.3	94.7
Wholesale and retail	17.9	81.6	15.3	96.4	11.0	99.4	16.6	79.8	15.4	93.9
Hotels and restaurants	6.6	89.1			2.0	99.9	2.8	89.0	4.0	95.7
Transport, storage etc.	3.8	55.5	3.2	87.0	4.4	97.0	4.4	38.9	8.2	88.2
Financial services	4.3	41.0	5.1	83.0	1.2	82.2	1.1	17.5	3.2	82.4
Real estate etc.	0.8	70.2			3.7	97.8	3.8	58.4	6.9	90.0
Public administration/ defence	-----	-----	-----	-----	5.1	43.6	18.7	1.9	12.7	44.9
Education	-----	-----	-----	-----	2.5	63.2	11.0	7.1	4.3	73.2
Health and social work	-----	-----	-----	-----	2.4	83.1	4.3	36.4	2.5	85.0
Other community/social services	4.5	60.2	42.8	72.4	1.3	85.4	2.0	60.0	2.7	85.0
Households with employed persons	9.1	87.9			6.4	100.0	9.8	99.6	13.1	94.8
Other economic activity	1.8	60.0	17.1	90.5	0.2	98.5	0.1	85.6	0.1	85.0
	100.0	-----	100.0	-----	100.0	-----	100.0	-----	100.0	-----
Total employment (000s)	**382.3**	**306.6**	**2,093.2**	**1,741.7**	**1,262.3**	**1,191.4**	**8,017.3**	**4,260.6**	**3,043.0**	**2,588.0**
% foreign workers (all sectors)		*80.2*		*83.2*		*94.4*		*53.1*		*85.0*

Source: Own calculations from national data.

[a] 2008 data for Bahrain and Saudi Arabia.

[b] Data for Bahrain are incomplete, since total employment for 2008 is recorded elsewhere as 467,000.

[c] No actual data supplied by the UAE, only % by sector; % foreign workers calculated by imputation.

public administration less than 63 per cent (at 44 per cent) with the majority at 98–100 per cent. Saudi Arabia is the least dominated by migrants, but even there most of the private sector is 76–91 per cent; migrant presence in the state-owned sectors is very low, ranging from 2 per cent to 27 per cent. The UAE has only one sector with less than 50 per cent immigrants – public administration with 45 per cent -- otherwise all sectors are in the range 73–96 per cent.

2.2.5. The role of the *kafala*, or sponsorship system

The management of labour recruitment is examined in some depth in section 3.1 below. Here, it is sufficient to note that – at least in principle – temporary workers are recruited by a sponsor, or *kafeel*; their presence in the country is as a temporary 'guest' of their sponsor or employer; and their rights and pay levels are limited. Given the massive supply of low-cost labour from Asia and minimally from other Arab countries, the long-term effect has been to exert downward pressure on unskilled, semi-skilled and even skilled pay rates (Winckler 2009b: 71). This, along with the 'privileged' state sector employment for nationals, is the primary cause of the labour market segmentation, and has created a structural impasse such that the private sector is neither willing nor able to absorb the growing indigenous labour forces of the GCC countries. Equally, the lack of private sector investment in capital-intensive production, new technology and accompanying training and education has led to substantial declines in productivity in the last decade or so (Shaham 2009: 3).

Two countries have now started to modify the *kafala* system; Bahrain has done so since August 2009 and Kuwait has recently announced that it had intended to abandon the system from February 2011. (See section 3.3 below.)

2.3. Characteristics of the immigrant population and workforce

2.3.1. Citizenship

Data on the national origins of immigrant populations in the GCC are completely suppressed, and those of immigrant labour forces are rarely provided by the GCC states. Some data for the GCC labour force are published by the Arab Labour Organization: these are reproduced for the year 2005 in Table 14. The table shows some different patterns of migrant origins. Three countries have a very high proportion of Asian workers: the UAE with 87 per cent, Oman with 92 per cent and Bahrain with 80 per cent. These three also have very low levels of Arab workers. Three other countries have a much higher presence of Arab migrants – three or four times the proportion – and these are Qatar, Saudi Arabia and Kuwait. Finally, Saudi

Table 14. *Totals and proportions of GCC labour forces, 2005, by region of origin*

	Total	% of LF
Bahrain	**306,000**	**58.58**
Arab	38,000	12.42
Asian	245,000	80.07
European	6,000	1.96
American	6,000	1.96
Others	11,000	3.59
Kuwait	**1,302,000**	**81.7**
Arab	403,000	30.95
Asian	851,000	65.36
European	4,000	0.31
American	2,000	0.15
Others	42,000	3.23
Oman	**605,000**	**66.13**
Arab	34,000	5.61
Asian	559,000	92.4
European	...	...
American	...	...
Others	12,000	1.99
Qatar	**315,034**	**56.69**
Arab	126,013	40.07
Asian	144,915	45.64
European	5,954	1.99
American	...	...
Others	38,152	12.3
Saudi Arabia	**4,894,000**	**64.57**
Arab	1,527,000	31.2
Asian	2,902,000	59.3
European	159,000	3.25
American	103,000	2.1
Others	203,000	4.15
United Arab Emirates	**2,738,000**	**82.26**
Arab	238,000	8.71
Asian	2,386,000	87.14
European	41,000	1.5
American	15,000	0.54
Others	58,000	2.11

Source: Reproduced from ILO (2009). Copyright © International Labour Organization 2009.

Arabia has a highish proportion of European and United States citizens at over 5 per cent, while Qatar has a mysterious 12 per cent classified as 'Others'.

Uniquely, Andrzej Kapiszewski (formerly Polish Ambassador to the UAE and Qatar) was able to compile estimates of the size of various migrant populations residing in the GCC countries. The latest available estimates are for the years 2002–4. They are reproduced in Table 15.

According to these data, in the early 2000s, Indians were the most numerous nationality at 3.4 million, followed by Pakistanis and Egyptians. At around 800,000 each, the

Table 15. *Estimated sizes of the principal migrant communities in the GCC (000s)*

Nationality	Bahrain (2004)	Kuwait (2003)	Oman (2004)	Qatar (2002)	Saudi Arabia (2004)	UAE (2002)	Totals
Indians	120	320	330	100	1,300	1,200	*3,370*
Pakistanis	50	100	70	100	900	450	*1,670*
Egyptians	30	260	30	35	900	140	*1,395*
Yemeni					800	60	*860*
Bangladeshi		170	110		400	100	*780*
Filipinos	25	70		50	500	120	*765*
Sri Lankans		170	30	35	350	160	*745*
Jordanians/ Palestinians	20	50		50	260	110	*490*
Sudanese					250	30	*280*
Indonesians		9			250		*259*
Iranians	30	80		60		40	*210*
Syrians		100			100		*200*
Turks					80		*80*
Bidoun	80						*80*
Nepalese				70			*70*

Source: Kapiszewski (2006: Table 3).

communities of Yemeni, Bangladeshi, Filipinos and Sri Lankans were the next most important. South-East Asians dominate the migrant community, with about double the number of Arab migrants.

As would be expected, the greatest number of source countries of migrants is to be found in Saudi Arabia – the country hosting some three quarters of the migrant workforce in the GCC. There is also great diversity in the UAE and Kuwait – the next largest hosts of migrant workers. These data are broadly consistent with the data shown in Table 14, of migrants by region of origin: the relative size in each country of the Sout-East Asian nationalities compared with Arabs is similar.

Since 2005, Oman has published details of the nationalities of its migrant workforce in the private and public sectors. These are reproduced in Table 16.

The data in Table 16 are (more or less) consistent with those in Tables 2 and 3. They are more detailed in showing employment in the public or private sector; clearly, the Omani state relies very heavily on GCC nationals (98 per cent female) for its ministries and on Indians, Bangladeshi and Pakistanis in the private sector. The gender of private sector employees is not available by nationality, but is overwhelmingly male.

Kuwait has also published recent data on nationalities of employees in the public and private sectors, in 'country groups'. These are shown in Table 17. Of the immigrant labour

Table 16. *Foreign workforce in public and private sectors in Oman, 2008, by nationality (000s)*

Citizenship	Employment sector		Totals	%
	Private	Public		
Indian	466.2	5.5	**471.7**	*55.6*
Bangladeshi	125.3	0.0	**125.3**	*14.8*
Pakistani	106.0	0.4	**106.4**	*12.5*
GCC	0.0	40.0	**40.0**	*4.7*
Egyptian	10.8	5.3	**16.1**	*1.9*
Filipino	15.7	0.0	**15.7**	*1.9*
Sri Lankan	9.3	0.0	**9.3**	*1.1*
Other Arab	0.0	2.2	**2.2**	*0.3*
Others	61.5	0.6	**62.1**	*7.3*
Totals	*794.9*	*54.0*	***848.9***	*100.0*

Source: Own calculations from national data.

Table 17. *Foreign employees in public and private sectors in Kuwait, 2008, by citizenship group and gender (000s)*

Citizenship group	Sector of employment				Total	% distribution	% female
	Private		Public				
	M+F	F	M+F	F	M+F		
GCC	0.0	0.0	2.2	1.5	**2.2**	*0.2*	*67.1*
Other Arab	405.5	20.2	41.4	13.8	**446.8**	*37.7*	*7.6*
Asian	691.9	45.2	23.8	9.6	**715.7**	*60.3*	*7.7*
North American	11.1	1.9	0.4	0.1	**11.5**	*1.0*	*17.1*
West European	4.1	0.9	0.4	0.2	**4.5**	*0.4*	*22.3*
East European	2.1	0.7			**2.1**	*0.2*	*31.3*
African	2.2	0.5	0.3	0.1	**2.5**	*0.2*	*23.7*
South American	0.3	0.1	0.0	0.0	**0.4**	*0.0*	*16.7*
Australasia	0.9	0.2	0.1	0.0	**0.9**	*0.1*	*16.3*
TOTALS	**1,118.1**	**69.6**	**68.5**	**25.2**	**1,186.6**	*100.0*	*8.0*

Source: Own compilation from national data.

force, 60 per cent is of Asian citizenship, followed by 38 per cent 'other Arab' but excluding the GCC. The public sector relies on 'other Arab' nationalities, as opposed to GCC, but also employs a substantial number of Asians. There is a very low proportion of female workers (8 per cent in total) with only GCC nationals being predominantly female at 67 per cent.

The total number of employed immigrant workers in Table 17 is very low, and inconsistent with the total given in Table 9. This indicates that the nationality data for

employment are incomplete and therefore unreliable. Broadly, the nationality proportions are consistent with the data in Tables 2 and 3.

2.3.2. Family presence, children and immigrant births

Consistently, GCC states have emphasized that 'expatriates' are simply temporary labour migrants, with very few permitted to bring family members. There are no available data on the presence of family members; only three countries – Oman, Bahrain and the UAE – publish data on immigrant children. Table 18 shows such data for children aged 0–14 and as a percentage of the immigrant population.

As is evident from Table 18, children up to 14 are present in significant numbers, although proportionately far less than the very young populations of the GCC countries. They represent 9–13 per cent of the immigrant populations of the three countries for which there are data.

Data on foreign children attending either state or private schools are available for four countries – Kuwait, Qatar, Oman and the UAE. These are shown for the latest available year (school year 2007/8) in Table 19.

Comparing the country totals with Table 18, the data for Oman look doubtful. There should be around 60,000 immigrant children of school age, but there are only 13,000 registered. The data for the UAE are more consistent with those in Table 18, i.e. 279,000 registered with around 310,000 of school age.

Figure 3 shows the distribution of foreign schoolchildren by sector and country across the four countries for which data are available. (Obviously, a serious problem is the omission of Saudi Arabia from these data, since it hosts the largest number of immigrants.) In all four countries, most foreign children are found in the primary schools; in Oman, almost exclusively so. It is unclear whether the low proportion in secondary schooling reflects

Table 18. *Foreign children aged 0–14 in Oman, Bahrain and the UAE, 2008 (000s)*

Age range (years)		Oman	Bahrain	UAE
	0–4	42.2	21.4	174.7
	5–9	36.4	20.5	167.3
	10–14	28.0	11.2	144.7
Total aged 0–14		**106.6**	**53.1**	**486.7**
Total immigrant population		900.3	568.8	3,873.0
% children		*11.8*	*9.3*	*12.6*

Source: National data.

28

Table 19. *Foreign children in school in the GCC, 2007/8 session (000s)*

	Kuwait	Qatar	Oman	UAE
Kindergarten (state)	1.76	13.7	-----	1.38
Kindergarten (private)	18.5	13.57	0.92	38.25
Primary (state)	17.17	44.65	7.24	12.76
Primary (private)	60.52	31	2.34	106.32
Intermediate (state)	13.48	19.38	0.73	18.94
Intermediate (private)	36.86	12.17	0.08	56.86
Secondary (state)	7.41	16.21	1.87	17.86
Secondary (private)	21.05	8.75	0.2	26.66
Total	**176.75**	**159.43**	**13.38**	**279.03**

Source: GCC (2010: Tables 7–14).

Figure 3. *Distribution of foreign schoolchildren in four GCC countries, 2007/8*
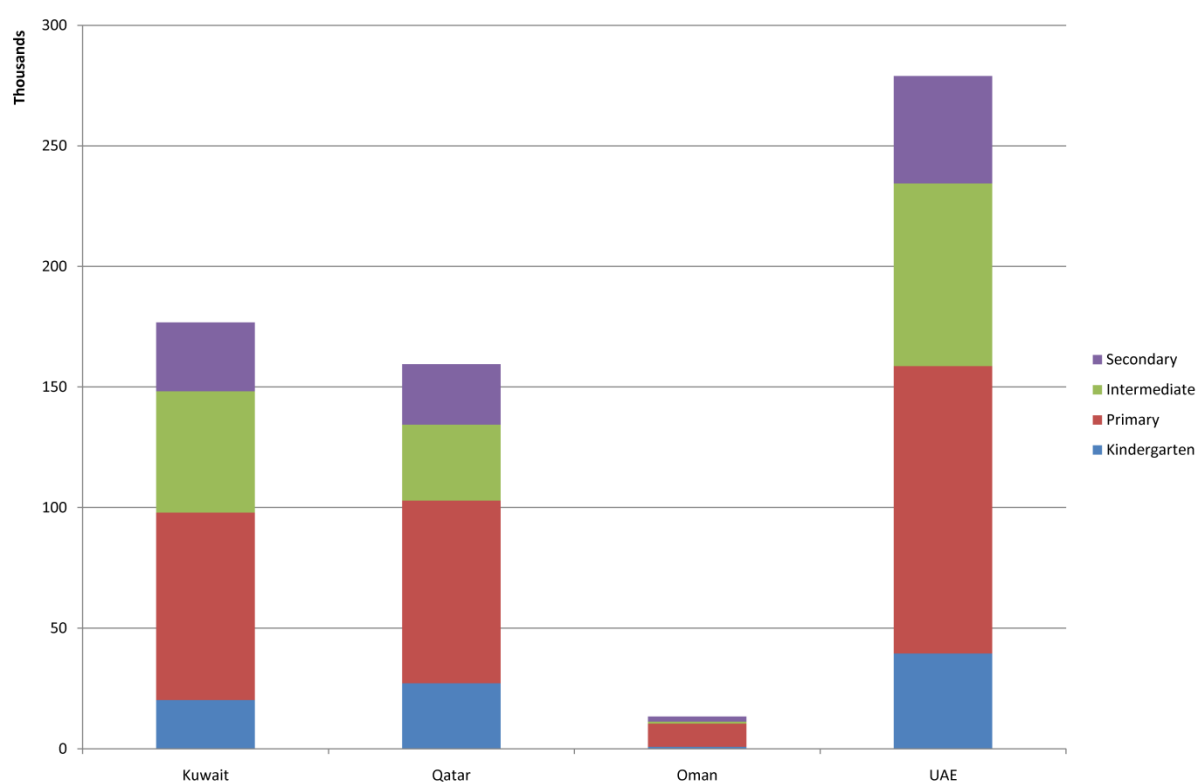
Source: Own calculations from GCC (2010: Tables 7–14).

merely the demographic structure of the immigrant population (of which we know little), unrecorded participation in the school system, or absence from it. It is possible that some are working under age (in contravention of international law) and in exploited conditions.

Table 20. *Foreign population not working (all ages) and foreign children <15 in the GCC, 2008 (000s)*

	Saudi Arabia	Kuwait	Bahrain	Oman	Qatar	UAE
Foreign population not in the labour force	2,410.0	624.0	111.0	91.0	284.0	1,285.0
Of which, aged 0–14	-----	-----	53.1	106.6	-----	486.7

Source: Own calculations from national data.

Table 21. *Foreign births and female immigrant populations in the GCC, 2006 and 2008 (000s)*

	2006			2008		
	Births	Female population	%	Births	Female population	%
Saudi Arabia	100.2	1,981.4	5.1	-----	-----	-----
Kuwait	21.1	475.6	4.4	22.3	506.3	4.4
Bahrain	3.4	129.9	2.6	4.1	162.5	2.5
Oman	4.0	146.8	2.7	4.5	207.0	2.2
Qatar	7.6	-----	-----	-----	-----	-----
UAE	35.1	920.0	3.8	-----	-----	-----

Source: Own calculations from GCC (2010) and national data for 2008.

Data on dependent spouses (presumably all female) are not available. A proxy measure may exist with the data on female migrants outside of the workforce. These have been presented previously in Table 4, and here are integrated with data from Table 18. Thus, Table 20 attempts to estimate the magnitude of family presence in the GCC.

For both Bahrain and the UAE, the data suggest that roughly half of the non-working immigrant populations are children under 15, with the rest as either older children or mothers outside of the labour market. For Oman, again the data simply do not make sense, since there are more children than persons outside of the labour market. (The employment and population data used for Oman are official data for the same year.)

Births to immigrant women may also provide an indicator of the extent of family settlement; it seems unlikely that there will be many single mothers in the immigrant community. Live non-citizen births (usually classed according to the father's nationality) are available from the GCC Secretariat for 2006 and for later years from Oman, Kuwait and Bahrain. These are shown in Table 21.

The data suggest, from the ratio of births to female immigrants, that there are proportionately more immigrant families in Saudi Arabia and Kuwait than in Bahrain and Oman, with the UAE as an intermediate case. However, we have no population data for Qatar other than for the labour force, which has the lowest female proportion in the GCC at 8 per cent (see Table 2). It is probable that there is a high proportion of immigrant families in Qatar. In the case of Oman, we have already seen that there are serious data problems and it is not possible to draw any conclusions.

Kuwait also publishes annual detail of live births by nationality, although it is unclear whether it is maternal or paternal nationality (or some other criterion) that is used. For 2008, total foreign births constituted 40 per cent of live births in Kuwait; the majority (68 per cent) were born to those with Arab ethnicity, with Egyptians at 22 per cent. Indians were in second place at 15 per cent of foreign births and Asian non-Arab countries totalled only 29 per cent.

Shah (2007) reports a similar pattern for registered non-citizens in Kuwait in 2007. Among all non-Kuwaitis, 372,194 persons (16.2 per cent) were born in Kuwait: 81 per cent were Arab, 17 per cent were Asian and the remaining 2 per cent had other nationalities (Shah 2007: 4). If the Kuwait pattern is similar to that in other GCC countries, then it is probable that Arab migrant workers (who are an older generation of immigrants in the region) constitute the great majority of families and children.

There is scant research or published work on family settlement in the GCC. One recent study (Nagy 2010) focused on Bahrain notes that the older migrant communities are non-Gulf Arab, Iranian and South Asian, with the right to bring in family members. Many of them have been residing in Bahrain since the mid-twentieth century. More recent immigrants (especially from South-East Asia) have tended to be recruited for unskilled work such as domestic service and construction labouring: these jobs do not qualify for the right to family reunification (Nagy 2010: 60). The restrictions placed on acquiring this right are multiple and extensive – ranging from income levels, through employment contract limitations, to the actual residency type of the migrant workers. Unskilled workers are generally located in labour camps outside of residential areas (Gardner 2010) and excluded from mainstream society.

2.3.3. Duration of residence

Only one country – the UAE – has made available data concerning duration of residence of its immigrant population. This is a matter of some importance, since the GCC countries' immigration policy relies on the short-term and temporary nature of its guestworkers.

Figure 4. *Duration of residence of immigrants in the UAE, 2005, by gender*
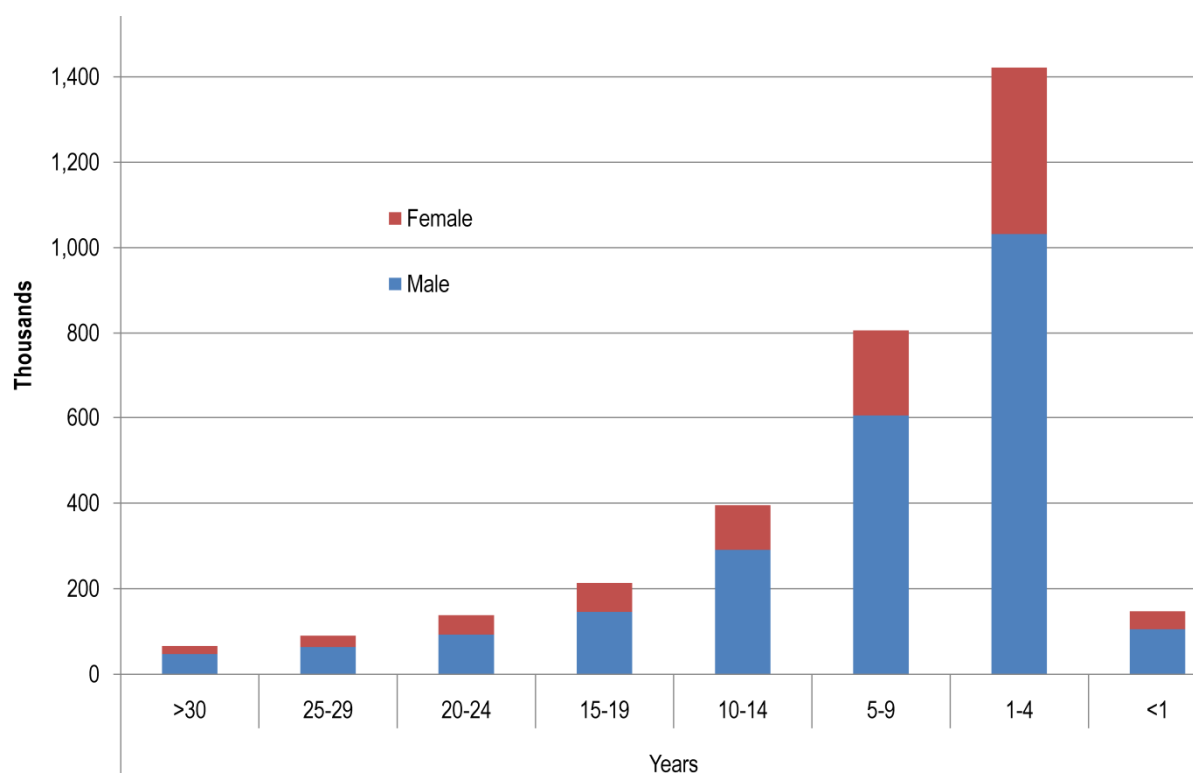
Previous estimates, based on unknown data sources, considered that the duration of stay averages 4–5 years, and can be as much as 7 years (Lucas 2004: 10). Figure 4 shows the available data from the UAE from the 2005 Census.

Several important points stand out. First, the modal duration of residence is 1–4 years, for both sexes. Second, the proportion of female migrants in each group is highest for 1–4 years, and declines over time. This is probably a reflection of the recentness of female immigration into the region. Third, nearly a third (28.5 per cent) of immigrants resided in the UAE for more than ten years. Thus, the 'temporariness' of labour immigration into the UAE (and the GCC) can be questioned, since residence in excess of ten years cannot be viewed as short-term labour migration.

Taking this together with the evidence presented in section 2.3.2, there is good reason to assert that although the majority of GCC 'expatriates' are temporary single migrants, there is a very large minority (of unknown proportion) that is settled and probably with family. These long-term migrants are likely to be predominantly from nearby Arab countries (Egypt, Syria, Jordan, other GCC) but with a new phenomenon of Asian family settlement (most notably, from India and Pakistan).

Table 22. *Percentage of women in migrant population and labour force in the GCC, 2008*

	Population	Labour force
Bahrain	28.5	15
Kuwait	32.7	23
Qatar	n.d.	8
Saudi Arabia	31.2	14
Oman	23.0	n.d.
UAE (2006)	26.9	13

Source: Own calculations from national data.

As with family settlement, there is almost no research on the duration of stay. Sharon Nagy's study of the foreign communities in Bahrain notes that they are well entrenched and remain well beyond the usual estimate of ten years' residency (Nagy 2010: 59). There is good reason to think that this applies across the entire GCC.

2.3.4. Gender

Data on the gender of migrants in the GCC are difficult to obtain, and mostly require calculation since states in the region have traditionally been reluctant to discuss the gender issue. Table 22 shows the latest available data on female proportions in total immigrant populations and labour forces in the GCC.

The ratio of women in the foreign population is relatively low, by international standards, at 23–33 per cent (although the ratio is unknown for Qatar). The proportion of women in the labour force is much lower, at 8–23 per cent. It is probable that the very low labour force ratio is unusually low in 2008, since this was a boom year with much work in construction. However, the immigrant female participation rates for the four countries where they can be calculated (Table 5) are far lower than the male rates – in three cases, just over half the male rates at 47–54 per cent. Only in Kuwait is the rate at a more typical level to be found internationally (64 per cent).

The sectoral location of women in the labour market is presented from official data in Table 23. Unfortunately, for Bahrain there are sectors entirely missing from the data, for Kuwait the sectors are merged and obscured, and for Oman the data cover only the private sector. There are no data at all for female employment by sector available from the UAE.

The principal employment sector for women is household work. This sector is extraordinarily large in Saudi Arabia (at 780,300 workers) with 67 per cent female. In

33

Table 23. *Extent of total migrant and proportion of female migrant employment by economic sector in the GCC, latest year (000s)*

	Bahrain* 2008		Kuwait* 2009		Qatar 2009		Saudi Arabia 2008		Oman[a] 2008	
	M+F	% female	M+F	% female	M+F	% female	M+F	% female	M+F	% female
Total migrant employment	**306.6**	*4.7*	**1,741.7**	*22.9*	**1,191.4**	*8.3*	**4,260.6**	*13.7*	**794.9**	*9.8*
Economic sector										
Agriculture and fishing	2.2	*0.3*	37.8	*0.5*	19.8	*0.0*	200.8	*0.1*	66.5	*0.6*
Mining and quarrying	-----	-----	1.7	*3.6*	57.6	*4.5*	8.5	*0.1*	14.3	*3.7*
Manufacturing	49.3	*4.2*	109.2	*4.6*	107.9	*0.3*	399.8	*1.0*	84.7	*0.8*
Electricity, gas and water	-----	-----	2.1	*3.8*	4.1	*1.0*	21.2	*0.0*	2.1	*1.0*
Construction	112.6	*0.5*	161.5	*4.6*	558.1	*0.6*	932.9	*0.1*	298.4	*0.3*
Wholesale and retail	55.8	*4.2*	308.5	*7.8*	137.6	*3.1*	1 062.6	*0.5*	123.2	*1.8*
Hotels and restaurants	22.4	*10.7*			24.9	*18.7*	200.6	*0.3*	45.1	*3.4*
Transport, storage etc.	8.1	*16.2*	58.4	*5.4*	54.2	*13.3*	137.7	*0.0*	12.3	*7.1*
Financial services	6.7	*88.3*	89.1	*10.2*	12.7	*18.1*	15.6	*1.2*	2.5	*12.1*
Real estate etc.	2.2	*6.4*			45.3	*4.6*	176.7	*0.6*	21.0	*5.6*
Public administration and defence	-----	-----	-----	-----	28.3	*3.3*	29.2	*0.1*	-----	-----
Education	-----	-----	-----	-----	19.7	*41.9*	62.7	*21.1*	4.0	*46.0*
Health and social work	-----	-----	-----	-----	25.0	*49.3*	126.6	*24.2*	11.6	*21.4*
Other community and social services	10.4	*23.6*	648.8	*41.3*	14.0	*11.8*	95.4	*5.7*	6.5	*18.6*
Households with employed persons	30.5	*6.7*			80.3	*59.9*	780.3	*66.8*	98.0	*64.9*
Other economic activity	4.2	*5.0*	324.8	*25.0*	2.0	*11.6*	10.0	*1.6*	4.9	*11.8*

Source: Own calculations from national data and GCC (2010).

[a] Data for Bahrain, Kuwait and Oman are incomplete.

Kuwait, the merged data for household and social services is the largest sector for foreign employment at 650,000 but with only 41 per cent female. In Qatar, the household sector is small compared with other sectors. The data for Bahrain seem to exclude domestic work completely; other data sources show around 70,000 employees in 2008, of which 64 per cent are female. The figure of 70,000, when added to the household sector data of 30,000, makes this sector of employment almost as important as construction. Although there are no gender data for the UAE, the household sector makes up an important 13 per cent of migrant employment (see Table 13 above). However, the accuracy of these data on domestic workers is questionable: some independent estimates have placed the figures for Saudi Arabia at 1.5 million (HRW 2010b: 2), which is roughly treble the figure in Table 23. A similar discrepancy is noted for the number of domestic workers in Kuwait.

The other sectors with a high female ratio are 'Education' and 'Health and social work', across the GCC. (Data are suppressed for Kuwait and Bahrain.) In Bahrain, uniquely, women make up 88 per cent of foreign workers in the financial services sector.

Male foreign employment occurs across the spectrum, but is most important in construction, retail and manufacturing in all GCC countries. In Saudi Arabia and the UAE, male foreign employment is also significant in parts of the public sector (as shown in Table 13), partly because state employment as a proportion of total employment is massive at 35 per cent in Saudi Arabia (see Table 9).

Thus, female employment is located in just a few sectors – predominantly in domestic work – whereas male employment spans the whole range of economic sectors, although mostly in unskilled and semi-skilled work.

2.3.5. Educational level

The only comparative data compiled on the educational level of the migrant workforces are contained in a 2010 Arab Labour Organization and IOM publication. Figure 5 reproduces these data.

The chart reveals some important differences across the GCC for the period 2002–6. Qatar has a very high proportion of 64 per cent of its migrant workforce with tertiary education, in comparison with the range of 11–19 per cent in the rest of the GCC. Oman has a very high proportion of illiterate migrants (21 per cent) while combining the two lowest categories (illiterate and barely literate) shows that four countries have a very high proportion of such migrant workers. Oman has the highest (52 per cent), followed by the UAE, Kuwait and Saudi Arabia (49–42 per cent). Bahrain has the most mixed educational profile, although

Figure 5. *Educational level of foreign labour in the GCC countries, 2002–6*
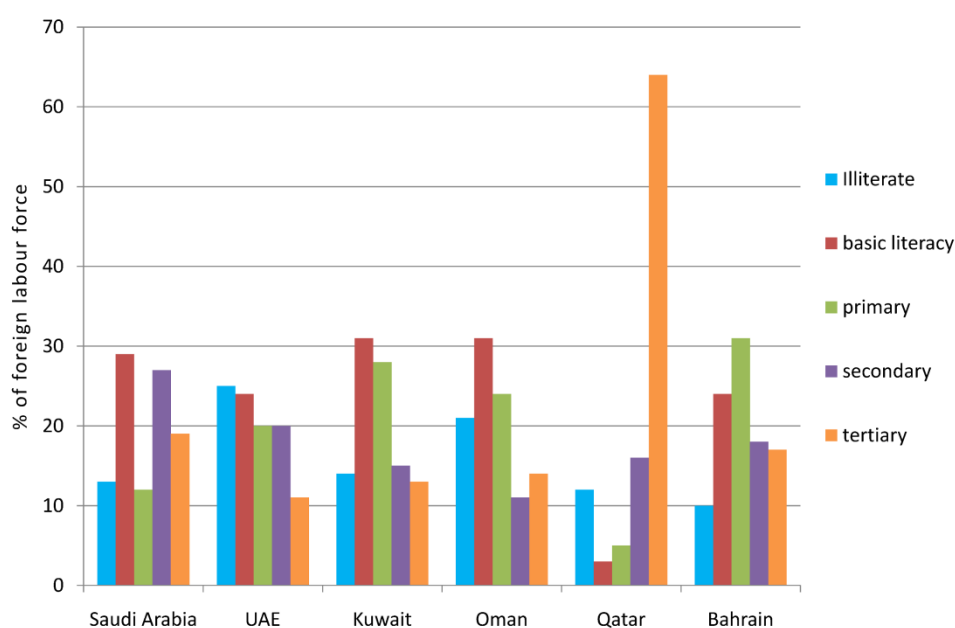
Source: Hassan (2010: Figure 18).

with relatively few with secondary or higher education; Saudi Arabia, after Qatar at 80 per cent, has the highest proportion with either secondary or higher education (46 per cent).

3. GOVERNMENT POLICIES

3.1. Recruitment and immigration management

In the very early days of managing contracted labour flows, some of this was arranged through offices set up to handle direct government-to-government requests. As the volume of workers grew, sending countries needed to have private sector involvement and a system of licensed recruitment emerged (Shah 2009: 2). The desire for rapid economic modernization led GCC countries to permit almost unrestricted flows of temporary migrant workers to be used in industries, whilst placing restrictions on the immigrants themselves (Shaham 2009: 4). At that time (the 1970s), emigration rules were being revised in the sending countries: dedicated bureaux were established within ministries to supervise recruitment agencies, review and approve contracts, register migrants, and ensure by means of guidelines and embassy support that there was adherence to minimum wages and working conditions and provisions for the welfare of migrants (Shah 2009: 2).

The *kafala*, or sponsorship, system was set up by the GCC countries as their own distinct regulatory framework. Its origins lie in 1950s labour market protectionism to benefit the native unskilled workforce (Winckler 1998: 19), and embodied, for example, in the 1959

Residence Law of Kuwait (Longva 1999: 22). Originally, the sponsorship system had the clear objective of providing temporary, rotating labour that could be rapidly brought into the country in economic boom and expelled during less affluent periods. In this purely economic sense, the policy was hardly distinguishable from the German *Gastarbeiter* policy of the 1960s. What is distinctive, however, is the role of the sponsor, or *kafeel*. Migrant workers receive an entry visa and residence permit only if a citizen or government agency sponsors them. The sponsor-employer is responsible financially and legally for the worker, and signs a document from the Labour Ministry to that effect (Longva, 1999: 20–1). The worker is tied to a particular employer, and if the worker breaks the contract he or she has to leave the country immediately at his or her own expense – otherwise the employer would cover the return fare after the end of the contract.

Workers (and any eligible dependants) are issued a residence visa for the number of years stipulated in the employment contract; these contracts are usually of two years' duration but renewable – providing a degree of permanence (Shah 2009: 8). Towards the end of the 1970s economic boom, most GCC countries started to become more restrictive in their approach to immigration, paying more attention to ethnic and religious issues. This increased sensitivity to the presence of very large foreign communities in the region was exacerbated by the fact that the majority of immigrant workers were from other Arab countries such as Egypt, Yemen and Palestine. With falling oil prices, employers started to turn to less-skilled Asian immigrant workers.

The 1990 Gulf War signalled a decisive new phase in immigration management in the Gulf (Girgis 2002) with the expulsion of around two million Arab workers and their dependants from the region (Fergany 2001: 4). Thus, mass recruitment of Asian workers proceeded, with annual inflows from Asia of 1.1–1.3 million, mostly from India and the Philippines but also from Bangladesh, Sri Lanka, Indonesia and Pakistan (Lucas 2008: Figure 2.3). The Second Gulf War also led to mass expulsions of Iraqis and nationals of countries sympathetic to Iraq: over 1.5 million were displaced, including one million to Yemen (Kapiszewski 2004: 121).

Initially, the *kafala* immigration system seemed to achieve all of its goals, but as early as the late 1980s some problems had become apparent (Shaham 2009: 4).These can be summarized as a 'basic inconsistency between the short-term political and economic objectives of the Sponsorship System and the structural realities of the labor market' (Shaham 2009: 5). In particular, a large stock of illegally resident workers had emerged by the 1990s; fraudulent sponsorship documents were commonplace amongst private

recruitment agencies, resulting in newly arrived migrant workers having to resort to irregular employment; employers were reluctant to expel their trained workers, simply because of some legal technicalities, and many migrants became semi-permanent; the system allowed extensive abuse of migrant workers' employment rights, because of the lack of secure legal status and enforcement mechanisms; and human rights abuses, especially of female domestic workers, emerged as a serious issue.

3.2. Illegality: migration, employment and visas

Kapiszewski (2001: 87–8) takes the view that before organized regulation of immigration into the GCC, irregular migration was the mechanism by which large numbers of migrant workers were brought rapidly into the region. As early as 1979, Kuwait started deporting undocumented or illegal foreign workers, with subsequent legalization and deportation initiatives in the 1980s (Winckler 1998: 21). Subsequent tough regulatory laws and harsh penalties across the GCC did not stamp out the phenomenon, which was seen as 'a normal occurrence', and by the late 1990s irregular migrants constituted some 10 per cent of the total population and 15 per cent of the workforce.[4] Shah (2009: Table 2) gives figures of 700,000 in Saudi Arabia for 1997, 300,000 in the UAE for the early 1990s, and 100,000 in Qatar for 1997. These constitute, respectively, 18, 37 and 41 per cent of the known migrant workforces of the period. These figures are disturbingly high and indicate that the orderly management of immigration into the GCC had essentially failed by the 1990s. Below, we examine illegality and migration in the GCC in three broad categories: irregular migration itself, migrants with an irregular status, and irregular visa trading.

3.2.1. Irregular (or illegal) migration

Originally a popular method of smuggling immigrants was by sailing dhows, but this declined when flying became a more standard means of reaching the Gulf countries (Kapiszewski 2001: 88). However, some illegal migration is thought to occur across the remote exclave of Oman, the Musandam peninsula; across the border with Yemen; and some networks using pilgrimage to Mecca (Shah 2009: 9). Trafficking is known to occur, with extensive reports in the 1990s of trafficking of girls from East Africa for prostitution, and women from Central and West Africa for housekeeping work. The Gulf countries are known as destination, rather than transit, countries (Baldwin-Edwards 2005: 20). According to Shah

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[4] This ratio places the GCC countries in a different category from any EU countries, for which recent estimates suggest that over 2 per cent of total population is unusually high. Interestingly, in the EU (27 countries), only Cyprus and Greece have had ratios of 2.5 and 5.6 per cent (Baldwin-Edwards and Kraler 2009: Table 5).

(2009: 9), women trafficked for prostitution are rarely given protection but more typically are prosecuted and deported for illegal residence.

As in all countries, estimates of the numbers of illegal border crossings or arrival with forged documentation are difficult to make, but there seems little interest by state authorities in carrying out such research. There are no scientifically prepared estimates available.

3.2.2. Irregular residence or employment

Irregular residence (or irregular employment, which necessarily means irregular residence) can occur for a number of reasons. Kapiszewski (2001: 89) suggests the following reasons:

- The migrant overstayed the visa permission and was unable to extend it.
- The migrant came on a tourist visa and remained working illegally.
- The migrant resigned from work or changed employer without official permission.
- The migrant was unable to get his or her passport back from the employer, and unable to leave the country or regularize the situation.
- The migrant's contract finished, but the employer refused to pay for the return ticket (as required by law) and the migrant could not afford one.
- The migrant deserted his or her sponsor because of non-payment of salary or abusive working conditions.
- The migrant's employer forced a change of employer (unlawfully) because of financial difficulties and was unable to legalize the situation.

To this extensive list we can add others, including the situation of the male second generation. Children born in the territory have no special status, but are covered by their parents' sponsorship. This ceases at 21 for male children, and upon marriage for girls. After that, the person must be registered either as a student or as employed, in order to be given legal residence. (Presumably, married women are permitted to remain on their husbands' residence permits, but this is not clear since the income requirements for family dependants are high.) Second-generation migrants accounted for 16.3 per cent of non-nationals in Kuwait in 2007 (Shah 2009: 8): this is not a negligible proportion, although the ages of the persons concerned are not known. No information has ever been provided on the second generation in other GCC countries, and this is clearly an issue that the authorities do not wish to be known or discussed.

Visa overstay is thought to be the most common situation, and constitutes a criminal offence in the GCC countries. There has been extensive government action to arrest overstayers in order to deport them, along with frequent 'amnesties' since the mid-1990s

(Shah 2009: 5).[5] In Saudi Arabia in 2005, the arrest of more than 2,700 overstayers in Jeddah 'resulted in the closure of 45 illegal clothing factories, several prostitution dens and factories producing alcoholic beverages' (Shah 2009: 11). Kapiszewski (2001: 92) notes a very important consequence of the 1997 Saudi Arabia amnesty: that subsequently, construction wage costs rose by as much as 200 per cent. The deportation of 750,000 illegal residents was acclaimed by Saudi authorities as giving 800,000 jobs to Saudi nationals, as well as bringing down the crime rate by 20 per cent (Kapiszewski (2001: 94). The number of irregular migrants who have left the GCC through amnesty programmes since the 1990s is in the millions (Shah 1999: Table 3) – most notably from Saudi Arabia. Information on deportations is not provided by the GCC countries (other than to the press), and is occasionally recorded and published by sending countries (Shah 2009: 5–6). More recently, the UAE notes that it legalized 95,000 out of an estimated 342,000 illegal residents in 2007 (UAE 2007: 18).

In the past, companies – and even municipalities – chose to allow migrants whose contracts had expired to remain, thus avoiding the repatriation costs and (in the case of the public sector) arguing that their services might be needed at some future point, so they should be allowed to remain as unemployed migrant workers (Kapiszewski 2001: 90). This is contrary to the law and the principles of the *kafala* system, of course.

3.2.3. Irregular visas

A particular abuse of the sponsorship system is that of visa trading, whereby the migrant worker takes up employment for a person other than the sponsor. This occurs extensively, typically when GCC nationals with business licences are given permission for work visas for a given number of immigrants. They may sell these visas to others, leaving the migrant worker in an illegal condition. This is known as 'visa trading' (Shah 2009: 12). A related, and also very common phenomenon, is that of the 'floating visa', whereby workers work illegally for various employers rather than their legal sponsor. This gives the migrant workers higher incomes, from multiple job-holding, and employers also benefit from zero recruitment costs, greater flexibility of hiring and other advantages over the formal system (Kapiszewski 2001: 91).

The extent of illegal visa practices is extremely high. In the UAE, the number of workers sponsored by fictitious companies in 2004 was estimated at 600,000 (27 per cent of the migrant workforce); and the Saudi Minister of Labour stated in 2004 that some 70 per

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[5] Unlike amnesties (or regularizations) in the EU countries, which grant temporary legal residence to their beneficiaries, or in the USA, where the amnesties ultimately result in citizenship acquisition, amnesties in the GCC often merely allow the persons concerned to leave the country.

cent of visas issued were sold on the black market, with similar statements from the other GCC countries (Shah 2009: 13). In Bahrain, in 2007 the authorities reported that some 20,000 small businesses were trading in visas. Visa trading is a multimillion-dollar industry; there are high fees for the initial sponsorship, followed by two-year renewal fees. In the UAE, a two-year work visa for an Indian sells for around US$2,000 and for an Iranian for US$4,000 (Shah 2009: 14). It remains extremely easy for GCC citizens to make a good income simply by visa trading; despite the fact that this is unlawful, there is no known prosecution of GCC nationals for these activities, and the migrants (and occasionally employers) are held to account. Even in cases where the sponsorship and employment are lawful, migrants are frequently asked to pay for their work visas if they go through a private recruitment agency (Shah 2009: 15).

3.3. Trends in government policies

The early years of relatively laissez-faire labour immigration into the GCC were replaced in the 1970s by tighter controls and restrictions in the management of immigration across the GCC (Kapiszewski 2001: 201). As governments became increasingly concerned about the permanent settlement of immigrant workers, formal policies became more and more restrictive. In Kuwait, for example, 1985 saw the introduction of minimum income requirements for family settlement, followed by prohibition of establishing a business without a Kuwaiti partner, and severe restrictions on participation in trade unions (Winckler 1998: 21-2). Nevertheless, the *kafala* system failed to deliver its primary objective – namely, rotation of a flexible labour force – owing to non-compliance by both employers and migrant workers. Essentially, market forces proved stronger than state capacity to enforce a complex and costly set of bureaucratic rules and procedures.

The 1990s saw yet more attempts to enforce the rules, by regulating the existence and activities of the recruitment agencies for migrant labour. These measures improved the situation slightly, but employers continued to fail to comply with the end-of-contract rules and repatriation of those workers (Shaham 2009: 5). Further attempts to control sponsors and manage the large stocks of irregular migrant workers failed to yield significant results. Since the mid-1990s, elimination of the dual labour market system has been a widely stated priority of the GCC countries' immigration and employment policies (Winckler 2009b: 72). Over the last decade, two other factors have played a role in impelling reform of immigration management in the GCC: international pressure concerning human rights issues and labour standards for migrants' employment (Kapiszewski 2001: 209), and demographic changes in

the native GCC populations, leading to rises in unemployment levels and considerable political pressure (Shah 2008:2). As early as 1985, the GCC adopted *The Statement on Objectives and Policies of Development*, which called for the 'correction of the population imbalance … whereby the proportion of aliens is reduced … consistent with economic necessities' (Kapiszewski 2001: 207).

Over the last few years, there has been a degree of recognition that the *kafala* system has failed. The UAE since the mid-2000s has taken steps to assist migrant workers in recouping unpaid wages, has required from 2008 compulsory electronic bank payments of wages, facilitated employment transfers, enhanced the legal rights of workers vis-à-vis employers, and from 2008 introduced compulsory health insurance for all workers (including those in domestic service) paid by sponsors (UAE 2007). Employment contracts for domestic workers have been instituted recently, protecting their rights to pay, accommodation, healthcare and working hours (UAE 2010).

In August 2009, Bahrain (which had previously announced its intention of abolishing the *kafala* system) modified its immigration rules to permit 'mobility transactions' so that migrant workers could change employer with or without permission of the sponsor-employer. It also established the Labour Market Regulatory Authority (www.lmra.bh) for the kingdom of Bahrain, to prepare reliable statistical data and analyses of the labour market, visas and immigration. (The more radical abolition was apparently blocked by private sector employers.) However, these reforms do not cover domestic workers, who remain under the *kafala* system (HRW 2010b: 17).

Kuwait, too, has entered this arena of immigration reform, with a ministerial statement in September 2010 that the system 'known as "kafeel"' would be scrapped when a public authority for the recruitment of foreign workers was established in February (Agence France-Presse, 26 September 2010). This follows on from a 2009 labour ministry decree permitting change of sponsor-employer at the end of a contract, provided that there have been three continuous years of service with the same employer (HRW 2010b: 16). Kuwait also set a minimum wage for the private sector in 2010 (*Gulf News*, 15 April 2010), including foreign workers but not for domestic service. Legislation for these is apparently being mooted, but faces public opposition to private homes being regulated by the Ministry of Social Development.

Previous attempts at reform in the region – e.g. by Saudi Arabia in 2000 – lifted some of the restrictions on migrants such as being confined to the district of workplace, or not being allowed to enter into contracts or own property. In 2009, the Shura Council approved

an annex to the 2005 Labour Law granting minimal rights to domestic workers, but these have yet to be implemented (HRW 2010a: 44).

Across the GCC (other than the UAE), domestic workers are excluded from coverage by labour laws, with extensive reporting of cases of abuse concerning recruitment deception, unpaid wages, confiscation of passports, and instances of physical abuse (HRW 2007, 2010b). The lack of substantive reform of this aspect of labour immigration is in contrast with Jordan's reforms, starting as long ago as 2001 (Baldwin-Edwards 2005: 35) and culminating in its amended labour law of 2008 and implementing regulations of 2009 (HRW 2010b: 14). No GCC country has made any significant policy changes addressing the situation of their long-term and second-generation migrants since the modest changes in citizenship law of Saudi Arabia.

3.3.1. 'Nationalization' of the GCC labour markets

This term, along with its specific variants such as 'Omanization' or 'Saudiization', refers to the general policy objective across the GCC of reducing dependence on foreign workers and replacing them with indigenous labour power. National initiatives emerged as early as 1985 in Kuwait and 1988 in Oman, but really took off in the 1990s, with Saudi Arabia and Oman as the most active in this area. Early policy approaches aimed at securing employment for nationals in the public sector had already been started in the late 1980s, but the private sector was (and remains) a very different case (Kapiszewski 2001: 212; Al-Kibsi et al. 2007: 24). However, in 1995, Saudi Arabia passed legislation requiring every employer of twenty or more workers to employ a minimum of 5 per cent Saudi nationals. This was increased to 25 per cent in 2000, 30 per cent in 2002 and 75 per cent in 2005 (Al-Kibsi et al. 2007: 24). In Oman, a 1995 Central Bank circular stipulated that by 2000 Omanis should hold at least 75 per cent of senior and middle management positions (Winckler 2009b: 75). Subsequently, all GCC countries have followed suit with national quotas (or, alternatively, immigrant ceilings) either generally or in specific professions. A further trend in all GCC countries recently has been to ban immigrant workers in specific occupations absolutely, with Kuwait as the last country to embrace this policy approach (Shah 2008: 11).

A broad array of policies has emerged over the last decade or so, whose impact has yet to become absolutely clear. Analytically, these measures can be categorized as shown in Table 24.

Table 24, necessarily incomplete, shows the variety of policy strategies that have been or are being used to achieve nationalization objectives. Categories A and B are aimed at

Table 24. *An overview of labour market strategies for 'nationalization' programmes*

A. Policies aiming to reduce the demand for immigrant labour

    1. Raising costs of hiring foreign workers (B, K, O)

    2. Closing of employment in specific sectors or professions (all GCC)

    3. Ceiling of proportion of foreign workers in company (SA, K, UAE)

    4. Tax on non-diversity of nationalities (i.e. ≥30 per cent any nationality) (UAE)

    5. Reducing labour-intensive projects in the public sector (K)

    6. Preferential award of government contracts to private companies satisfying nationalization quota objectives (O)

B. Policies aiming to reduce the supply of immigrant labour

    1. Health insurance paid by migrant worker (K, SA, UAE)

    2. Degree validation fee (UAE)

    3. Direct tax on migrant workers (SA)

    4. Restrictions on visa issuance (B, SA)

    5. Deportation of irregular migrants (all GCC)

C. Policies aiming to increase the demand for indigenous labour

    1. State subsidy (up to 50 per cent) of private sector pay for native worker (SA)

    2. Quotas for natives in public/private employment (SA, K, UAE, Q)

    3. Development of economic sectors for nationals' employment (B, SA, Q, UAE)

    4. Directing new labour market entrants to the private sector (all GCC)

    5. Promoting study and training in technology and medicine (all GCC)

D. Policies aiming to reduce the supply of indigenous labour

    1. Discouragement of female labour market participation (B, SA)

    2. Family planning measures, to lower the fertility rate (O)

E. Policies aiming to reduce local/immigrant wage disparities

    1. Reform/near-abandonment of the *kafala* system (O, B)

    2. Taxes on hiring migrant workers (B, K, O)

    3. Subsidies for hiring of indigenous workers (SA)

Source: Own compilation, multiple sources

reducing either the supply of, or demand for, immigrant workers; categories C and D are focused on mostly increasing private sector demand for native workers, although at least three countries also have some policies that might reduce the indigenous labour supply. Category E is perhaps the most interesting, in that it attempts to set a more level playing field for the highly segmented labour markets. In particular, one can say that the *kafala* system has been a primary cause of that segmentation, and its abandonment indicates a limited shift towards market forces.

3.4. Evaluating policy outcomes

3.4.1. Nationalization policies

According to Table 24, although there is a wide range of policies across the GCC, there are many common policy approaches. In category A (reduction in demand for immigrant labour), it is the policy of closing employment to foreign workers in specific sectors. In category B (reduction in the supply of immigrant labour) it is the deportation of irregular (illegal) immigrants. In category C (increasing the demand for indigenous labour) there are two policies used across the GCC: vocationally directed study and training, and directing labour market entrants to the private sector.

Among the many policies pursued, however, the imposition of employment quotas for national workers has been seen as the 'flagship' policy (Shaham 2009: 8). (This corresponds to category C2 and its correlate, A3.) This has been implemented in the public sector for some time, and the proportion of nationals in the public sector is very high. Indeed, the reliance of GCC nationals on the privileged public sector for their employment has become a serious structural issue, rather than a solution to the problem of rising unemployment. Table 7 above shows the trends across the GCC in public sector employment as a share of the total employment of nationals. By 2008, all countries other than Kuwait seemed to be less reliant on public sector employment than they had been in 2000 – in contrast to the 1990s, which saw significant increases. However, even with this encouraging trend, the proportion of employed nationals in the state sector in 2008 was in excess of 72–88 per cent for Saudi Arabia, Kuwait and Qatar, 47 per cent for Oman and 29 per cent for Bahrain. There are no data available for the UAE.

In the private sector, the quota policies were initially accepted, treating them as a kind of tax (Al-Kibsi et al. 2007: 24); however, as the quota levels were increasingly raised, companies resisted them. Saudi Arabia had aimed at 81 per cent Saudiization for the travel

industry in 2004–7, and met with strong opposition (Shah 2008: 14). In Bahrain, the construction industry was reported as having an acute shortage of workers in 2005 (Shah 2008: 15). Private sector employers complain about the lack of vocational training of national workers, their deficiencies in basic educational skills, and their low commitment to their work. Al-Kibsi et al. (2007: 25) cites a survey of employers in Bahrain, Saudi Arabia and the UAE, which revealed that a quarter of national employees failed to turn up for work regularly, while many quit their jobs after 6–9 months, saying that they were bored. Companies have a number of strategies to deal with the quota policy. One is to negotiate with state authorities for additional migrant labour; another is to employ national 'ghostworkers' to meet the quota, but ask them to stay at home; and the third is to use 'ghostcompanies' to acquire migrant workers illegally (Al-Kibsi et al. 2007: 25). Circumvention of quota obligations is now seen as a normal part of doing business in the GCC.

The presence of national workers in the private sector is shown for 2003 in Table 8 (above) and (implicitly) in Table 9. What these two tables show is that as the private sector massively expanded in the oil boom years of the mid-2000s, the proportion of nationals in the sector declined from 48 per cent to 16 per cent in Oman, from 46 per cent to 20 per cent in Saudi Arabia, from 30 per cent to 19 per cent in Bahrain, with Kuwait remaining at 3 per cent and Qatar dropping to 1 per cent. These data show conclusively that economic growth can occur only with the importation of labour – even in a large country such as Saudi Arabia.

Bearing in mind the misleading data such as 'ghostworkers', one broad measure of nationalization policies' outcomes is the ratio of national workers in the total labour force. Looking at the trends, from 1990, through 1999 and up to 2008, Table 2 shows different patterns across the GCC. Only one country, Saudi Arabia, has a consistent major decline in its proportion of immigrant workers in employment – down from 60 per cent in 1990 to 51 per cent in 2008. Kuwait has a major decline over the 1990s, and a small increase since 1999. The UAE has had a major decline since 1999. The remainder (Bahrain, Oman and Qatar) all had significant increases in their ratio of immigrant workers over the period 1999–2008, and Bahrain also for the preceding decade. The previous gains made in the 1990s in the proportion of nationals in employment in two small GCC states (Oman and Qatar) were more than offset by the losses in the last decade. In fact, the boom years of 2005–8 really tested the capacity of the nationalization policies, since there simply were not enough skilled or willing unskilled national workers to fill the rapidly increasing number of private sector jobs. Only Saudi Arabia succeeded in increasing its national employment proportion – and that,

46

Table 25. *Proportion of nationals in total employment in the GCC, 2005–8 (%)*

	2005	2006	2007	2008
Bahrain	33	32	30	28
Kuwait	18	17	16	17
Oman	32	30	28	25
Qatar	7	6	7	6
Saudi Arabia	n.d.	46	46	47
UAE	8	8	8	n.d.

Source: Dito (2010: 77–82).

probably through 'false accounting' as explained above. Table 25 shows the changing rates of nationals in employment over the period 2005–8.

3.4.1.1. Nationalization successes by economic sector

Table 13 shows foreign share of employment by economic sector, for the GCC (other than Oman) in 2009. The total extent of nationalization is between 6 per cent and 20 per cent, excepting Saudi Arabia at 47 per cent, and most sectors are dominated by immigrant workers. Bahrain has only two small sectors with national presence over 50 per cent – agriculture and financial services. Kuwait has only utilities (at 83 per cent), all others ranging from 1 per cent to 28 per cent. Qatar has only public administration at 66 per cent, with the majority in the range 0–2 per cent. Saudi Arabia is the most successful, but even there most of the private sector is 9–24 per cent; in the state-owned sectors it ranges from 73 per cent to 98 per cent. The UAE has only one sector with a majority of national workers – public administration with 55 per cent – otherwise all sectors are in the range 4–27 per cent.

Oman does not provide adequate employment data by economic sector, and is excluded from Table 13. The official government data describing Omanization by sector take very specific small sectors (without giving actual numbers) and by so doing manipulate the data. Even so, it is evident that only a few subsectors have high levels of native workers. As with most of the GCC, the most nationalized sector is banking, at 90 per cent. This is followed by debt collection (at 90 per cent), travel and tourism (but excluding hotels) at 85–90 per cent, and oil and gas at 73–90 per cent. The least nationalized are private education academic posts (16 per cent), clothing factories at 25 per cent, and industry at 35 per cent.

Overall, the evidence suggests that only Saudi Arabia has had any significant success in its nationalization policy. This confirms the less detailed analyses of the public and private sectors given above.

3.4.1.2. Alternative approaches to quotas and ceilings

Some of the other policy approaches are actually more promising, and it is paradoxical that so much attention has been focused on what is, basically, a crude political idea of 'quotas'. For example, policies in the category A1 (Table 24 above) are highly beneficial in reducing the pay differential between native and migrant workers, and where the tax moneys are used for the vocational training of native workers (as in Bahrain) constitute a powerful policy tool. Policies of type C3–5 are very important in the longer term; C1–2 are quick-fix solutions which seem to create as many problems as they solve. Ultimately, policies in category E are the most important, provided that both the quality and quantity of indigenous human capital are available for the economies. In the long run, weakening (preferably removing) the labour market segmentation should have highly beneficial results for productivity and promotion of economic growth that is not predicated on oil production.

3.4.2. Other policy reforms and trends

Bahrain, the UAE and Kuwait have made some important changes in their management of immigration, although all somewhat minimal considering the systemic problems that have become evident.

In Bahrain, the major change is that migrant workers can switch employers. The Labour Market Regulation Authority (LMRA) gives the total of mobility transitions for the second quarter of 2010 as 2,819, with 63 per cent concerning expiry of work visas, 36 per cent with consent of previous employers, and only 1 per cent without consent (LMRA 2010). Even with this clear improvement, there have been reported cases of abuse where employers cancelled visas before the worker could transfer to another employer. Furthermore, there is still no protection for domestic workers. Thus, the impact of these legislative changes is modest.

In the UAE, there appears to be no state information since 2007, when most reforms were initiated. Although the reforms have been many and wide-ranging, the lack of any systematic reporting mechanism makes it impossible to evaluate their effect. One systematic independent review of the situation of migrant workers (HRW 2009) concludes that substantial abuses and exploitation continue in Abu Dhabi (and the UAE, by implication) despite state efforts made in 2006 and 2007. The fundamental problems of recruitment fees, confiscation of passports, restrictions on movement and employment along with the prohibition of trade union activity and collective bargaining have yet to be addressed adequately (HRW 2009: 7).

The Kuwaiti reforms are very recent, and no impact analysis seems to have been made thus far. Nevertheless, the anticipation of abolition of the *kafala* system is of great importance and will require careful replacement with a managed immigration system.

Interestingly, the country with the greatest success with its nationalization programmes is also the one that seems to have made the least progress in reform of its immigration management. Although Saudi Arabia has only 50 per cent of its labour force as migrant workers, it is by far the largest country and its impact on the region is massive. Furthermore, the situation of its estimated 1.5 million domestic workers is a matter of grave concern for human rights activists and international organizations, and cannot easily be brushed aside.

4. COMMON PATTERNS, NATIONAL VARIANTS

Typically, the GCC countries are treated as a bloc with common problems and policies. Although there are commonalities, there are also major differences of structure and very different implications for policy measures. Below, we examine first the common patterns, and subsequently the differing national variants of the GCC model.

4.1. Common patterns

All GCC countries have relied on the sponsorship system of rotation of temporary workers, and all have found that it has failed. Visa trading has been identified as one of the main causes of its failure, along with non-implementation of the rules concerning return of migrant workers at the end of contracts. Across the GCC, the result seems to be that there is a significant minority of long-term or permanent residents, along with a significant number of second-generation migrants. Information on these two phenomena have been concealed in all but a few cases – indicating a political reluctance to deal with the sensitive issue of permanent foreign residents in countries where immigrants *in toto* outnumber the indigenous populations.

There is no obviously common approach to reform of the *kafala* system, although all GCC countries have made at least some minor reforms. Nevertheless, at this point there seem to be rather different strategies in reforms of both labour market and immigration management across the GCC. There is a common reluctance to reform the *kafala* system with respect to private households (and domestic workers), although the UAE has made some progress in that regard. Nevertheless, systematic abuses are commonplace in every GCC

country, indicating that sponsorship is inherently an inadequate system for the protection of the rights of migrant workers.

All GCC countries have had very serious segmentation of their labour markets owing to their immigration (and gender) policies, and the creation of highly paid protected jobs for nationals in the public sector – leading to overstaffing, low productivity, avoidance of private sector lower-paid employment, and distortion of the education system in preparation for careers in the public sector. The demographic pressures pushing young national entrants into the labour market vary across the region, with Saudi Arabia clearly as the worst case (as evidenced by its youth unemployment rates). Nevertheless, all GCC countries have a problem with the level of training and expectations of their national labour forces, impacting heavily on their employability in the private sector.

Finally, all GCC countries have embarked on some sort of 'nationalization' programme, with varying strategies and emphases and highly variable outcomes across the GCC. The common nationalization policies are: the closing of certain sectors to immigrant workers, the deportation of irregular workers, and policies attempting to increase the employability and employment of the indigenous population. Employment quotas for national workers are also extensively used: this approach is even seen as the 'flagship' policy of nationalization strategies. Across the GCC, the only country that can be seen as having real success with this policy is Saudi Arabia – and even that success story is questionable in functional terms.

4.2. National variants

4.2.1. Saudi Arabia

The demographic profile of Saudi Arabia is closer to the average in the Arab world than it is to those of other GCC countries, with a very young population and massive increases in the future indigenous labour force. Population ageing is not a primary concern for some time: the young labour market entrants are the overwhelming priority, since they are too numerous to be incorporated into the public sector. Energy accounted for 66 per cent of GDP in 2007 – the highest proportion in the GCC (World Bank 2009c: 8).

The native human capital of Saudi Arabia is quite weak, with low levels of education and very high levels of especially female illiteracy. Of those with higher education, a very large proportion (>70 per cent) have studied humanities or social sciences – a direct result of

the public sector employment policy, which encouraged non-vocational advanced education (World Bank 2008).

In the labour market, Saudi Arabia is the only GCC country that has succeeded in reducing its proportion of foreign workers since the 1980s; now, roughly half the labour force consists of nationals. The historically low total participation rate of Saudis has doubled over the last decade, but with a massive gender imbalance – for 2008, a male rate of 61 per cent and a female rate of 11.5 per cent. Saudi women make up only 16 per cent of the indigenous labour force. Currently, the employment rate of nationals is very low, at 13.3 per cent, reflecting high female unemployment rates alongside low participation.

Employment of nationals remains very dependent on the state sector at 72 per cent, although down from a peak of over 80 per cent in 2000. However, employment by the state makes up 35 per cent of total employment, double or even quadruple the ratio in other GCC countries. Native workers' presence in the private sector is at 20 per cent – along with Bahrain, the highest in the GCC.

The structure of employment by economic sector is heavily weighted towards services, especially for women. The immigrant workforce is highly diverse, with a wide range of educational levels – implying effective use of the foreign labour power in the economy. Notably, only 14 per cent of the foreign labour force is female, with a foreign population that is around 30 per cent female.

Kapiszewski (2001: 234) notes the perception by Saudi employers and state authorities of a missing 'work ethic' among nationals. This leads to absences, refusal to carry out tasks and quitting jobs readily, amongst other things. Other problems are the comparatively low salaries in the private sector (even when nationals are paid double the migrant wage), the refusal to work in 'foreigners' jobs' (although this is slowly changing) and the outdated education system.

In terms of government policy, the Saudi authorities have been the most proactive and even aggressive in their nationalization policies. Awareness of the need for effective utilization of the native workforce dates back as far as 1970. However, despite the apparent success in controlling the migrant worker ratio, there are some serious issues. The ability of national employees actually to carry out the work needed is in question, with 'ghostworkers' being used to satisfy the legal quota requirements. Second, even with such measures, the total employment rate is low, because of the exclusion of Saudi women. Third, the great demographic challenge has yet to occur: where will all of the jobs needed come from, and will the human capital of the national workforce be high enough to replace migrant workers?

4.2.2. Oman

Like Saudi Arabia, Oman has a young population structure and its native labour force will increase considerably by 2050. Unlike Saudi Arabia, it is one of the less rich GCC countries and its oil reserves are now nearing depletion. The energy sector contributed 39 per cent of GDP in 2007 (World Bank 2009c: 8). Thus, even more than in Saudi Arabia, public sector employment for the future labour market entrants is not going to be an option.

The native human capital of Oman is similar to that of Saudi Arabia, with low educational levels and high illiteracy, especially of women. Tertiary education seems to be proceeding with more awareness of resource allocation issues, in that the private sector is permitted to operate only while the state manages compulsory education. However, the choice of higher education specializations reflects the public sector employment strategy, and there are very low levels of technology or medical studies (World Bank 2008).

Omani participation rates are historically very low, and unknown for the present period; there are also no available data on the proportion of women in the labour force. On the other hand, the national employment rate is rather better than that for Saudi Arabia (22 per cent as opposed to 13 per cent). There has been a traditional reliance on public sector employment, but this was reduced to 47 per cent of nationals' employment by 2008 (the second lowest in the GCC). Nationals' share of private sector employment had gone down to 16 per cent by 2008, owing to economic growth and the take-up of jobs by new immigrant workers. As with Saudi Arabia, unemployment rates are thought to be very high (although no data are available).

In contrast with Saudi Arabia, the immigrant workforce has the lowest educational level of all GCC countries and in 2008 consisted mostly (>86 per cent) of Asian workers. Attempts to rein in the proportion of foreign workers had some success in the 1990s, but the proportion rose to 75 per cent by 2008 – although this is lower than in all but Saudi Arabia

Omanization was started early (1988) and after initial successes lost ground more recently. Reports indicate that private sector employers have been opposed to replacing foreign workers with nationals, on the grounds that they are unable to do the work. Others have laid blame on preferential treatment of foreigners in the private sector, especially affecting graduates (Kapiszewski 2001: 230). There is also some indication of similar 'work ethic' problems to those in Saudi Arabia. Despite the very proactive role of the state in promoting the employment of nationals, it is unclear that the poor human capital of Oman will suffice to remove the skilled foreign labour component. More likely is that in the future

Omani nationals will be more prepared to undertake low-skill employment, even at relatively low wages; in this way, the Omanization policy may have some successes.

4.2.3. Bahrain

Bahrain, like Oman, has limited oil and gas reserves that are expected to run out in the near future (Shaham 2009: 6); the energy sector was 36 per cent of GDP in 2007, the lowest in the GCC (World Bank 2009c: 8).

The level of human capital in Bahrain is thought to be the highest in the GCC (Kapiszewski 2001: 220). School enrolment rates have been the highest since the 1980s, reaching 97 per cent for secondary education by 1985. The tertiary education rate by 2003 was at 34 per cent – high by international comparison, and well above the rest of the GCC. In terms of quality of school education, Bahrain fared well in international testing of mathematics skills; in higher education, 21 per cent study technology subjects and – uniquely in the GCC – 7 per cent study medicine. Private tertiary education does not operate in Bahrain, also unusual in the GCC. Adult illiteracy rates for the total population are quite high (possibly distorted by foreign workers) but youth illiteracy rates are the lowest in the GCC at 0.2 per cent (World Bank 2008).

Until the late 1990s, Bahrain had the lowest ratio of foreign workers in the GCC, but the ratio is now similar to that of Oman – although 10–20 per cent below that of the oil-rich small states. Participation rates are quite high, and the national employment rate is the highest known in the GCC at 26 per cent. Nationals' reliance on public sector employment is astonishingly low, at 29 per cent of employment in 2008; similarly, state employment as a proportion of total employment is very low at 8.4 per cent. This seems to have occurred through considerable expansion of private sector employment over recent years; by 2008, national workers constituted 19 per cent of private sector workers (similar to the level in Saudi Arabia).

Sectoral employment data are problematic, but in general terms seem to show great reliance on construction, followed by manufacturing and sales. Female employment is high in the public sector, but with recent growth in private sector employment the low proportion there means that overall it is fairly low.

The educational profile of Bahrain's immigrant workforce is diverse, with a small proportion of poorly educated workers, although not so many with tertiary education. Most of the foreign workers are Asian, with a small proportion of MENA Arabs. Unemployment levels are high, and structurally fairly typical of the GCC countries.

Government policy has not followed the nationalization approach of the other GCC countries, although early efforts in the late 1990s seemed to be in that direction. More recently, innovative policies have been developed – including the taxing of employers for hiring foreign workers, and using the money for a Labour Fund. The Fund is expected to generate US$500 million a year, which will be used for workforce training programmes, measures to promote private sector productivity (e.g. subsidies for IT systems, or consultancy fees), as well as guaranteeing access to commercial banking loans for small and medium-sized enterprises (SMEs). The plan is to increase the labour fees and then remove the quota system entirely, since the discrepancy between national and immigrant wages should have been eliminated (Al-Kibsi et al. 2007: 27). Other innovative measures include the establishment of a Labour Market Regulation Authority, in 2006, with new powers to transfer employment sponsorship more easily and also to supervise employers more closely (Shaham 2009: 8).

With a high level of human capital, and an imperative to diversify economic activities with oil as a small component of GDP, Bahrain has a good chance of implementing its own specific nationalization policy. However, with one of the smallest populations in the GCC (after Qatar) it is likely to be dependent on migrant labour for unskilled heavy work, and possibly on GCC migrant labour for some skilled sectors.

4.2.4. Kuwait

Kuwait maintains a fairly high birth rate, such that it has no approaching demographic problems. It is a wealthy GCC country, although with uncertain oil reserves, and the energy sector accounted for 59 per cent of GDP in 2007 (World Bank 2009c: 8). Kuwait has managed to stabilize its nationals' employment at just under 20 per cent over the last decade.

The quality of human capital is low, with 74 per cent not having completed secondary education and only 8 per cent with higher education. Education enrolment rates have been high since the late 1980s; in 2003, tertiary education rates were quite high, although not as high as in Bahrain. Quality of school education is around the MENA average, and below the international average. Around 30 per cent of schooling is in the private sector (World Bank 2008).

Nationals' participation rates, both male and female, are high and not significantly below those of the immigrant population. Unemployment of the national population has never been at high levels (Kapiszewski 2001: 223), and is calculated at 3.6 per cent for 2008.The public sector employs 86 per cent of all nationals in employment, which is the

highest in the GCC along with Qatar; nationals make up only 3 per cent of the private sector and 74 per cent of the public sector.

Data for employment by economic sector are incomplete, but in the private sector seem to show a heavy reliance on personal and social services with high migrant presence in those sectors. The public sector is the second largest in the GCC (at 18.5 per cent of total employment) and has the highest proportion of female employment at 49 per cent.

The proportion of immigrants in the labour force is high (the third highest in the GCC) at 83 per cent in 2008. The immigrant workforce has a high proportion (45 per cent) with very low education and is of diverse origin, with a high proportion of Arabs at around 38 per cent. Kuwait has the largest share of women in its migrant population, at 33 per cent, and at 23 per cent of employed population.

Kuwait has followed a nationalization employment policy, although without the obvious imperatives of some other GCC countries. Policies include quotas for nationals in public sector employment, ceilings on immigrant quotas in the private sector, the closing of certain professions to immigrants (a recent policy), and taxes on the hiring of migrant workers along with health insurance charges. It is unlikely that Kuwait can significantly reduce its dependence on migrant workers without major change in its human capital resources. This includes addressing quality of schooling, as well as failings in higher education and the absence of vocational training of any sort.

Reforms of immigration management seem more related to human rights concerns and the social integration of Kuwait's immigrant population than to economic issues.

4.2.5. Qatar

Qatar has a very small population relative to its economic size, which has clear implications for its current and future dependence on immigration for economic development. The energy sector contributed 59 per cent of GDP in 2007 (World Bank 2009c: 8), the second highest after Saudi Arabia. Qatar is the smallest GCC state, and the most dependent on migrant labour at 94 per cent in 2008.

The quality of human capital is quite high, especially the proportion with tertiary education (21 per cent). Adult illiteracy rates are moderate, and youth rates very low. Since 1985, education enrolment rates at all levels have been quite high, even by international standards. Like Kuwait, Qatar has a gender imbalance at tertiary level, with almost three females per male student. Nineteen per cent of studies are in technology and engineering

subjects, which is high for the GCC countries. Qatar has a very high level (72 per cent) of private primary schooling, and also of secondary schooling (32 per cent) (World Bank 2008).

Qatar has the world's highest proportion of immigrant employment at 94 per cent in 2008, and has had around 90 per cent for the last twenty-five years. Nationals' total participation rate is similar to that of Kuwait, but is higher for males and rather lower for females. The employment rate for nationals is given by the ILO as 7.5 per cent, but this figure (the lowest in the GCC) is not supported by the high participation rate and very low unemployment rate calculated in this report: by these criteria, Qatar should have the highest employment rate in the GCC. Like Kuwait, Qatar relies on the public sector for employment of its nationals (87 per cent in 2009), and nationals constitute less than 1 per cent of employment in the private sector. Overall, state employment makes up 12 per cent of total employment, which is much reduced from the proportion in the early 2000s. Data on employment by sector show the overwhelming importance of construction in recent years at 44 per cent of all employment, followed by sales.

The educational profile over the period 2002–6 of Qatar's immigrant workforce is astonishing, with 64 per cent as graduates. The origin of the migrant workforce is also unusual, with a large proportion of Arabs (40 per cent) as well as 'others': the latter are probably Iranians and Nepalese, according to Kapiszewski (2006). Since then, the massive inflow of unskilled Asian workers has doubtless completely altered the educational profile of Qatar's immigrant workforce. The proportion of women in the migrant labour force is the lowest in the GCC, at 8.3 per cent in 2009.

Although Qatar has subscribed to nationalization as an ideology, its small population size means that it cannot realistically expect to replace migrant workers with nationals. The diverse and high-quality migrant labour force in Qatar indicates a clear economic strategy, with the traditional policy of privileged state employment for national female graduates.

4.2.6. The United Arab Emirates

Hydrocarbons contributed only 49 per cent of UAE GDP in 2007 (World Bank 2009c: 8), although this low proportion is the result of successful economic diversification. Oil production is mostly managed by one of the federation's seven emirates – Abu Dhabi – which possesses an estimated 10 per cent of the world's oil reserves. Dubai, on the other hand, has developed a very successful services-based economy, involving tourism, construction, telecommunications and financial services (Shaham 2009: 6). Labour and immigration regulation are fragmented, owing to the federal system and the divergent needs

of Abu Dhabi and Dubai – the former relying on mainly unskilled Asian labour and Dubai attracting skilled westerners into its many Free Economic Zones (Shaham 2009: 7). However, since the global financial crisis, Dubai has suffered serious economic downturn owing to its reliance on external financing (World Bank 2009c: 49).

Historically, the quality of human capital in the UAE is not high, although it is the GCC country with the weakest labour market data and difficult to evaluate. There seem to be similarities with the educational profile of Saudi Arabia, in terms of gross enrolment rates in education. Adult illiteracy levels are high, and very high for youth. (Unusually, the male rates are higher than the female, presumably reflecting the immigrant population's attributes.) In higher education, the UAE is unusual in a very high proportion (24 per cent) studying science or engineering, along with a massive over-representation of women in university (over three females per male) (World Bank 2008).

The UAE shares with Qatar fairly high participation rates for male nationals, but with rather low female rates – thus depressing the total participation rate. Published unemployment data show a high total rate, which is especially high for women. There are no available data on employment rates, but they should be marginally above those for Saudi Arabia and below Oman.

There are no recent data on public sector employment, but 2003 data on private sector employment show that only 1 per cent of employment is held by nationals. Sectoral employment data show a profile similar to that for Saudi Arabia, although with a smaller education sector and slightly larger household work sector.

The UAE over the last decade has alternated with Qatar as the GCC country with the highest rate of immigrants out of total employment, currently around 85 per cent. Its immigrant workforce has the lowest educational profile, after Oman, with 49 per cent possessing little or no education. The migrant workers are predominantly Asian (from India and Pakistan) at 87 per cent of the workforce, with 9 per cent Arab and small numbers of Europeans. The proportion of women in the labour force is similar to that of Saudi Arabia (at 13 per cent), but above that of Qatar.

According to one analyst (Shaham 2009: 8), the UAE has been the pioneer of nationalization quota policies for the employment of nationals in the private sector. It has also developed more interesting policies, such as a tax on employers for non-diversity of migrant nationalities employed, imposition of fees for health insurance of migrant workers and degree validation fees, and the development of possible areas of employment for nationals. However, the small size of the population, along with problems typical of the GCC such as

poor motivation and training of the indigenous population (Kapiszewski 2001: 240), mean that – as in Qatar – there is a real need for a large migrant workforce. Nationalization policies are really more about job creation for nationals than replacement of the vital migrant workforce.

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APPENDIX: NATIONAL STATISTICAL SOURCES

Bahrain

Summary statistics[6]
Basic aggregate demographic indicators (2004-2008)
Births and Deaths, Bahraini/foreign (2004-2008)
Birth rate, death rate and population growth rate, for Bahrainis, foreigners, and total (2004-2008)

Census and demographic statistics
Foreign and Bahraini population, by gender, age group (2008)

Vital statistics
Births, Bahraini/foreign (2008)
Crude birth and death rates, by Bahraini/foreign nationality (1999–2008)

LMRA online data (www.lmra.bh)
Total, private, public and domestic employment, by gender and Bahraini/foreign nationality (2002-2010, quarterly data)
Work visa applications and issuances, by type (2000-2009)
Newly insured workers, by gender, age group, and Bahraini/foreign nationality (2010, Q2)
Newly insured workers, by gender, economic activity, and Bahraini/foreign nationality (2010, Q2)
Breakup of irregular workers in Bahrain, June 2010

Kuwait

Central Statistical Office (estimates based on 2005 Census)
Kuwaiti and foreign population, by region, gender and Kuwaiti/foreign nationality (12/2009)
Kuwaiti and foreign population >15 years and work status, by gender, age group and Kuwaiti/foreign nationality (12/2009)
Kuwaiti and foreign workforce >15 years and occupational group, by gender and Kuwaiti/foreign nationality (12/2009)
Kuwaiti and foreign workforce >15 years and economic sector, by gender and Kuwaiti/foreign nationality (12/2009)
Kuwaiti population >10 years, by gender, age group and educational level (12/2009)

Annual Bulletin for Vital Statistics 2008
Live births by nationality and gender (2008)

Annual Bulletin for Vital Statistics 2005
Fertility and Reproduction rates, Kuwaiti females (2005)
Live births by nationality and gender (2005)

Employment Statistic in Government Sector 2008
Employees in the government sector, by gender and Kuwaiti/foreign nationality (2008)
Non-Kuwaiti employees in the government sector by gender and nationality groups (2008)
Employees in the government sector, by institution, gender and Kuwaiti/foreign nationality (2008)

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[6] 'Summary statistics', 'Census and demographic statistics' and 'Vital statistics' are chapter titles of an unknown statistical publication, online at the government website, www.moh.gov.bh.

Employees in the government sector, by educational level, gender and Kuwaiti/foreign nationality (2008)
Employees in the government sector, by job type, gender and Kuwaiti/foreign nationality (2008)

Main features of expatriate labour employment in the private sector, 2007
Distribution of foreign employees in private sector employment by educational level and gender (2007)
Distribution of foreign employees in private sector employment by occupation divisions (2007)
Distribution of foreign employees in private sector employment by gender and economic sector (2007)
Distribution of foreign employees in private sector employment by nationality grouping (Asian/Arabic/other) (2007)
Distribution of foreign employees in private sector employment by economic sector and nationality grouping (2007)
Distribution of foreign employees in private sector employment by gender and 8 nationality groupings (2007)
Distribution of foreign employees in private sector employment by occupation divisions and 8 nationality groupings (2007)
Distribution of foreign employees in private sector employment by economic activity and 8 nationality groupings (2007)

Saudi Arabia

Census 2004
Foreign and Saudi population, by gender, region, governorate

Demographic Survey 1430 (2009)
Basic aggregate demographic indicators

Demographic Survey 1429 (2008)
Foreign and Saudi population >15, by gender, administrative area, age group, in/out of labour force
Foreign and Saudi labour force (>15), by gender, age group, educational level
Foreign and Saudi employees (>15), by gender, age group, main occupation groups, educational level, economic activity groups
Foreign and Saudi unemployed, by gender, age group, educational level
Unemployment and activity rates, by gender
Ratio of Saudis in labour force, by gender

Demographic Survey 1428 (2007)
Foreign and Saudi population >15, by gender, relation to labour force
Unemployment and activity rates of Saudis, by gender
Ratio of Saudis in labour force, by gender

Demographic Survey 1427 (2006)
Foreign and Saudi population >15, by gender, relation to labour force
Unemployment and activity rates of Saudis, by gender
Ratio of Saudis in labour force, by gender

Unknown statistical source
Saudis and foreigners in the private and mixed sectors (2005, 2006, 2007)

United Arab Emirates

Census 2005
National and foreign population, by Emirate, gender, national/foreign citizenship (2005)
National and foreign population, by age group, gender, national/foreign citizenship (2005)
Foreign population, by gender, age group and duration of residence (2005)
Employed foreign population, by gender, age group and duration of residence (2005)

UAE in Figures 2005
National and foreign population's educational level, by gender, national/foreign citizenship (2005)
National and foreign population's employment status, by gender, national/foreign citizenship (2005)
Economically active and crude activity rates, by gender, national/foreign citizenship (1975, 1985, 1995, 2005, 2006)
Total employed population's educational level, by gender, national/foreign citizenship (2005)
Refined activity rate, unemployment rate, crude birth rate, total fertility rate (aggregate only) (2006)

UAE in Figures 2009
Employed population by main group occupation, national/foreign citizenship (2009)
Employed population by main group occupation, by gender (2009)
Employed population by economic activity, by national/foreign citizenship (2009)

Statistical Abstract 2008 (from LFS 2008)
Labour force participation rate by nationality, sex and age group
Labour force participation rate by nationality, sex, emirate and (urban/rural)
Labour force participation rate by nationality, sex and educational status
Crude employment rate by emirate, sex, nationality and (urban/rural)
Unemployment rate by emirate, sex, nationality and (urban/rural)

Emirate of Dubai – Labour Force Survey 2009
Population>15 years, by gender, employment status, national/foreign citizenship (2009)
Employed population >15 years, by age group, gender, national/foreign citizenship (2009)
Employed population >15 years, by educational level, gender, national/foreign citizenship (2009)
Employed population >15 years, by occupation, gender, national/foreign citizenship (2009)
Employed population >15 years, by economic activity, gender, national/foreign citizenship (2009)
Unemployed population >15 years, by educational level, gender, national/foreign citizenship (2009)
Unemployed population >15 years with previous work, by reason for unemployment, gender, national/foreign citizenship (2009)
Inactive population >15 years, by reason for inactivity, gender, national/foreign citizenship (2009)

Qatar

Census 2010 (preliminary data)
Total population, by municipality, gender (2010)

Census 2004

Total population, by municipality, gender (2010)

Qatar Statistics Authority (from LFS 2009)
Qatari and foreign population >15 years, by gender, economically in/active, Qatari/foreign nationality (2009)
Labour force >15 years, by employment sector, gender, Qatari/foreign nationality (2009)
Labour force >15 years, by occupation, gender, Qatari/foreign nationality (2009)
Labour force >15 years, by gender, Qatari/foreign nationality (2001, 2006, 2007, 2008, 2009)
Labour force >15 years, by economic activity, gender, Qatari/foreign nationality (2009)
Labour force >15 years, by gender, employment status, Qatari/foreign nationality (2004)
Economically inactive population >15 years, by gender, employment status, Qatari/foreign nationality (2004)

Labour Force Sample Survey 2007
Economically active >15 years, by public/private sector, Qatari/foreign nationality (2006, 2007)
Labour force participation rates, by age group, gender, Qatari/foreign nationality (2007)
Qatari employed by occupational group, educational level (2007)
Employed persons by institutional sector, by gender, Qatari/foreign nationality (2007)
Average hours of work, by gender, Qatari/foreign nationality (2007)
Unemployment rates by gender, Qatari/foreign nationality (2001, 2006, 2007)
Unemployment rates, by age group, gender, Qatari/foreign nationality (2007)
Population >15 years and employment situation, by gender, Qatari/foreign nationality (2007)
Population >15 years and educational level, by gender, Qatari/foreign nationality (2007)
Unemployed >15 years, by educational level, gender, Qatari/foreign nationality (2007)
Qatari unemployed persons >15 years, with secondary education and unwilling to work in the private sector, by gender and reasons (2007)
Economically inactive persons >15 years, by educational level, gender, Qatari/foreign nationality (2007)
Economically inactive persons >15 years, by marital status, gender, Qatari/foreign nationality (2007)

Oman

Census 2004
Foreign and Omani population, by region, gender and age group
Foreign labour force, by educational level, occupational group and nationality
Foreign and Omani employees, by company (main employers only) and Omani/foreign

Labour Force Survey 2008[7]
Foreign labour force, by occupational group
Foreign labour force, by economic activity
Foreign labour force, by nationality

Statistical Yearbook 2009
Total population, Omani/foreigners (1985–2008)
Foreign and Omani population, by gender, age group, region and governorate (2008)
Births and deaths, Omani/foreign (2008)

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[7] Not published. Statistics available through interrogation of online database of the Ministry of National Economy, http://www.moneoman.gov.om/Default.aspx.

Birth rate, death rate and population growth rate, for Omani, foreigners and total (2006, 2007, 2008)
Omani and foreign government employees, by broad sector, Omani/foreign and gender (2002–8)
Omani and foreign government employees, by nationality and gender (2006, 2007, 2008)
Omani and foreign government employees, by educational level
Government new hirings, by educational level and Omani/foreigners (2007, 2008)
Government employment terminations, by reason and Omani/foreigners (2007, 2008)
Lawfully employed Omanis and foreigners in private sector (2002–8)

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