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Demography, Migration and Labour Market in Saudi Arabia

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Demography, Migration and Labour Market in Saudi Arabia*

Françoise De Bel-Air

Abstract: For many countries in Asia and the Arab world, Saudi Arabia is a prime destination and source of remittances from workers. As of mid-2018, expatriates made up 37 per cent of the Kingdom's population, most of them coming from South Asia. They accounted for 76 per cent of the employed population and 80 per cent of the private sector workforce. Since September 2011, and in spite of a spurt in foreign labour recruitment since the mid-2000s, a voluntary policy called 'Nitaqat' aimed at 'Saudising' the Kingdom's workforce is being implemented. An array of labour market reform measures, introduction of taxation and dependents' fees, as well as two large-scale campaigns of deportation of foreign residents in irregular administrative situation in 2013 and 2017 eventually led to a decrease in the number of expatriates in the Kingdom. About 800,000 left the country between 2017 and mid-2018. Approximately 2.7 million foreign nationals were deported from Saudi Arabia between April 2013 and August 2018.

Keywords: Saudi Arabia; Foreign Population; National Population; Nationals and Foreign Labour; Migration Policy; Statistics; Saudisation; Irregularity; Amnesty; Deportation; Citizenship.

Introduction

The birthplace of Islam and home to its two holiest shrines, Saudi Arabia has an ideological and political influence over 1.6 billion Muslims, or 23 per cent of the world's population.¹ The Kingdom is also the biggest economy in the Arab world, endowed with the world's second largest proven oil reserves. This makes Saudi Arabia a major hub for population movements. The pilgrimages to the holy sites of Mecca and Medina attract millions of Muslim pilgrims from abroad every year (2.4 million in 2018, from a high of 7.2 million in 2012). Also, with an estimated 12.2 million non-national

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residents in 2017,² Saudi Arabia ranked as the second top remittance-sending country in 2016³ and was among the top five migrant destination countries worldwide.

Labour immigration to the Kingdom dates to the late 1930s, as oil exploration picked up, spurring inflows of foreign experts and labourers from Western countries and poorer neighbouring Arab states. Back then, foreigners shared the labour market with mostly-unskilled Saudi workers; the latter organised politically, and some labour strikes were launched in the oil fields throughout the 1950s. After 1973, however, the first oil boom stirred economic diversification and infrastructure-building, resulting in much larger flows of skilled and semi-skilled workers into the Kingdom. These migrants, Arabs as well as Asians, were recruited on a short-term contract basis and not entitled to social and political rights. Moreover, foreign labour flows were used as a means for redistributing oil wealth: in addition to taking on career opportunities in the expanding public sector, Saudi citizens could also get an income from the trade of labour visas.⁴ Hence, labour recruitment became disconnected from market needs. Pools of illegal migrants grew, unaccounted for by authorities, but ready to be tapped for short-term business needs. For these reasons, until the 2000s, available data on the major aspects of Saudi Arabia's population were scattered and scarce.⁵

After 1979, political tensions⁶ underlined the destabilising power of large foreign communities' settlement in the country. Attempts to control the spread of ideologies hostile to oil monarchies (leftist, Arab nationalist, and stemming from Islamist movements), followed by the breaking out of the First Gulf War in August 1990 after the invasion of Kuwait by Iraq, sparked increasing mistrust towards Arab workers among the Gulf regimes. This led to their gradual replacement by Asian labourers deemed less prone to political claims.

In the 1990s, the dwindling of oil revenues combined with high demographic growth (around 3.5 per cent annually in 1990, down from above 4 per cent in the late 1970s) drastically limited the redistributive capacities of the Saudi state. Consequent to Saudi Arabia's application for membership in the WTO, finally achieved in 2005, liberal adjustment policies were also initiated during the 2000s, which further threatened the stability of the rentier social contract. The enhancement of the private sector's share in the economy and attraction of FDI's gave an impetus to easing the entry and activities of foreign investors and workers. During this decade, expanding oil prices⁷ indeed gave way to massive infrastructure projects. At the same time, however, efforts to channel nationals to the private sector in response to the deregulation of the economy and the subsequent contraction of job opportunities in the public sector clashed with the growing demands made on the state by the increasingly educated youth. Heavy investments in education had increased enrolment in tertiary education between 2000 and 2010, partly through several study-abroad schemes developed during the decade.⁸

Some labour market planning measures were enacted.⁹ Yet, youth unemployment and even poverty became increasingly visible in the 2000s and early 2010s. In 2013, unemployment levels for nationals stood at 12.2 per cent (7.6 per cent for the men as against 33.4 per cent for women) and at 28.4 per cent for the 15-29 age group (men: 17.5 per cent and women: 60.3 per cent).¹⁰

Indeed, protests during the 2011 “Arab Spring” focused on unemployment as well as corruption and “discriminatory clientelism.”¹¹ King Abdullah countered the protests by announcing a massive \$130 billion subsidy package to fund new housing programmes, raise the minimum wage of public servants (mostly Saudis), and create more employment opportunities in the government sector. The ‘Hafiz’ system was enacted which provides a SR2,000 allowance to young Saudi jobseekers. A minimum wage for the private sector — for nationals only — was set at SR3,000 (\$800) to persuade Saudis to venture into the sector.

Yet, to address the very pressing need for creating more and better jobs in the private sector for Saudi youths, the government had to regain the upper hand in economic decision-making. The issue of indigenisation of the workforce has been periodically revived since the 1990s,¹² yet it was always fiercely opposed by the business community, which claims that Saudi workers are costly, hard to lay off, and unwilling to engage in low-skilled tasks, while lacking the skills, training and, above all, labour productivity demanded by the private sector. Drastic labour market reforms were thus enacted during the 2010s, along two lines: reduce private sector’s reliance on foreign labourers through financial and institutional pressure; create incentives for nationals to join the labour market.

The Nitaqat campaign for the Saudisation of the workforce was launched in September 2011 under the supervision of the General Organisation for Social Insurance (GOSI) and the Ministry of Labour (now Ministry of Labour and Social Development, hereafter MLSD). The system combines incentives that encourage firms to hire Saudis and sanctions for non-compliant ones. It classifies businesses by band (initially four and currently six categories: Platinum, Green (High, Medium, Low), Yellow and Red), depending on the nationalisation targets reached. Unlike previous Saudisation reforms which imposed blanket quotas, the nationalisation quotas set under Nitaqat vary depending on the industry (60 categories), the size of the entity (5 categories) and the percentage of Saudi nationals to expatriate employees in their workforce (nationalisation performance), as well as Saudi employees’ average salaries and retention rate. Additional credits are granted for businesses employing priority categories, among whom are women, students, and disabled persons.¹³ In order to boost Saudisation quotas, the Ministry of Labour also decided in September 2017 that non-Saudi children born to Saudi mothers and foreign mothers of Saudi nationals would be allowed to work in professions previously restricted to Saudis only.¹⁴ Companies classified in higher categories enjoy greater incentives such as flexibility in recruiting and managing expatriate employees, lower processing fees, and other administrative benefits. By contrast, lower graded entities have restricted immigration and sponsorship benefits and are subject to penalties for redundant expatriates (SR2,400, or \$640). Mandatory targets and regulations are often revised as the programme is implemented in phases.¹⁶

Since its inception, Nitaqat has phased out expatriates from a growing number of activity sectors and positions, now restricted solely to Saudi nationals. All shops selling women and childcare accessories have been reserved for Saudi female employees. Another decree entering into force in October 2018 will ban foreign labourers from twelve more sectors of the retail industry.¹⁷ Contracts of expatriates employed in government bodies and ministries are also to be terminated within three years¹⁸ and, since 2017, the validity of expat work visas for private sector employees has been reduced from two years to one year.¹⁹

Seeking to increase the costs of employing non-nationals, in January 2017 the government started collecting additional monthly levies per expatriate worker in companies where expats outnumber Saudis or stand in equal numbers with them. The levies are set to increase every year.²⁰ Recent measures also target expatriates themselves. Since July 2017, Saudi Arabia has been imposing fees for expats' dependents.²¹ More constraints are also on the way for prospective expatriates and their employers, such as the full digitalisation of the recruitment process,²² higher visa fees and tighter assessment of job descriptions by the MLSD.²³

Nitaqat also limited, to a certain extent, the overarching power of the *kafeel* (sponsor) over the foreign employee. Some degree of mobility between jobs is now possible for workers, who can change sponsors and profession under certain conditions,²⁴ with or even without sponsor's approval.²⁵

Besides looking to alleviate nationals' unemployment through phasing out large numbers of expatriates from sectors likely to absorb Saudis, labour nationalisation policies also aim to make private sector employment attractive and rewarding for young nationals, as an alternative to government jobs. Therefore, in Saudi Arabia, like in other Gulf States, improving human capital is high on the reform agenda. One of the three pillars of Saudi Vision 2030, the reform masterplan launched in 2016, is to achieve a "thriving economy," through diversifying it from the current dependence on oil and expanding job opportunities for Saudi citizens. It therefore supports the creation of a knowledge-based economy in the Kingdom through investing in education, and fostering innovative, high value-added, service-oriented and high-tech industries.²⁶ The Telecommunications and Information Technology (IT) sectors, for instance, were set as privileged labour localisation targets for the near future.²⁷

The reform move thus requires amending labour immigration policies, towards promoting highly-skilled immigration. A "scientist and expert visa" was announced in 2011.²⁸ In early 2018, the measure was implemented with a focus on health specialists.²⁹ In line with some provisions of Vision 2030, ("attracting the talents" and simplifying residency and visa systems), the Kingdom announced in April 2016 the launch of a "Green Card" system, on the model of the US Green Card, for the end of 2021. The scheme is only for foreign investors and highly qualified experts.³⁰ For an annual fee of SR14,200 (\$3,786), the plan would abolish the mandatory sponsorship for the beneficiaries, who would become their own sponsor and get permanent residency in Saudi Arabia and would be able to engage in any business in the Kingdom without having a local Saudi partner, enjoy free medical treatment like Saudi nationals, and apply for loans and buy property in the country. Green Card holders would also pay zakat (alms) and other taxes on par with nationals. In return, the system is expected to generate around \$10 billion annually through reduced remittances and other sources, besides bringing in billions of dollars in foreign investment.³¹

Such measures could significantly overturn the rule forbidding, in theory, the settlement of non-nationals in Gulf countries and open opportunities for a kind of economic membership, if not (yet) the acquisition of full citizenship. Only a few expatriates would be able to benefit from a Green Card scheme. Yet, it may be another indication of the government's willingness to progressively limit the scope of the *kafala* system, and thereby citizens' and business actors' control over the design of employment and migration policies. This may be in follow up to the earlier (still limited) opportunities for sponsorship

change granted to professionals under Nitaqat as well as the measures passed in the framework of renewed bilateral labour agreements.³² Also, changes in the regulation for the recruitment, placement and conditions of domestic workers (FDWs) are underway under the government's supervision.³³

Increased government control over the management of foreign manpower, however, is not limited to the labour and socio-economic reform process. The dominant feature of today's migration policies in Saudi Arabia is, indeed, the enhancement of security control over foreign residents. Saudi Arabia had attempted to limit the presence of illegal residents earlier, for example with the construction of a 1,800 km iron fence along its southern border to control entries from Yemen.³⁴ In the 1990s and 2000s, periods of amnesty alternated with crackdown operations against illegals. However, the campaign launched on April 3, 2013 was of a much wider scope and scale. It systematically targeted all residents and workers in irregular situation: those with no or expired residency or work permits; those working for an employer other than their sponsor; those operating in a trade other than that described on their iqama (residency permit); as well as those who entered illegally or were caught trying to exit the Kingdom. As of November 2013, after the expiration of the amnesty period, about ten million regularisations had been performed and Saudi authorities claim that more than 2.5 million migrant workers left under the programme,³⁵ either through deportation or "voluntarily."

A second campaign labelled "A Nation without Violators" was launched on March 29, 2017. The initial 90-day amnesty period was extended up to four times for certain nationalities,³⁶ and the final deadline for all was set for November 15, 2017. No regularisations of status were reported in the press, but Saudi authorities claim that expatriates with residency issues who reported themselves during the amnesty period would not be recorded as criminals. An estimated 758,570 foreign residents from 140 nationalities were said to have left during the amnesty.³⁷ Those who did not were fined and fingerprinted upon deportation, hence barred from returning to the Kingdom legally in the future. As of the end of August 2018, an additional 1.6 million foreign residents were arrested, mostly under charges related to residency (1,238,046 expatriates), and labour laws (263,205) while 123,767, most of them Yemenis, were held for crossing the border illegally. Deportations between November 15 and August 30 amounted to 412,000.³⁸

Regional events³⁹ and ensuing security concerns explain the scale of the crackdowns conducted since 2013.⁴⁰ Nonetheless, deporting irregulars was also justified (especially in 2013) as operations of a managerial nature, destined to "rationalise" the labour market. Security concerns as well as efforts to enhance job prospects for young Saudis thus focus on decreasing the numbers of expatriates in the country. Saudising many sectors and professions, making foreign labourers more expensive to hire, limiting their employment opportunities and length of stay has effectively contracted expatriate numbers. Furthermore, the sluggish economic growth due to low oil prices, introduction of certain taxes such as VAT, levies on foreign employees and dependents' fees greatly reduced the attractiveness of Saudi Arabia for expats. Consequently, about 800,000 left the country between 2017 and mid-2018,⁴¹ an exodus initially expected to be lower (670,000) and slower (by 2020 only).⁴² Recent social reforms, including the incentives to increase women's participation in the labour force under Vision 2030 and the lifting

of the women driving ban, should also negatively impact the fate of domestic immigrants employed as drivers and domestic workers.⁴³ Yet, in spite of such a massive population exodus, Saudi nationals' unemployment rates peaked at 12.9 per cent during the first quarter of 2018 (30.9 for women and 7.6 for males).⁴⁴ This may be explained by the time needed to “shift the Saudi labor force to take on higher paying white collar professional service roles and create a working class of Saudis willing to do service sector, retail, and construction jobs,”⁴⁵ beside the vast scale of “fake Saudisation” in many businesses.⁴⁶ Moreover, expats' departures, especially that of families with children, is also bound to negatively affect a number of economic sectors in the country.⁴⁷ It remains to be seen if and how the recovery of oil prices in mid-2018 will give Saudi authorities more leeway to counter current socio-economic difficulties.

OUTWARD MIGRATION

Stocks

Drawing a picture of Saudis residing abroad is a difficult task, as Saudi statistics do not keep a record of expatriate nationals, except for students. Neighbouring countries of the Gulf Cooperation Council (GCC) do not publish data on foreign residents disaggregated by country of citizenship or country of birth.

At the end of 2014, the Saudi Pension Fund numbered 4,587 Saudi nationals working in other GCC states, 3,810 of them in Kuwait.⁴⁸

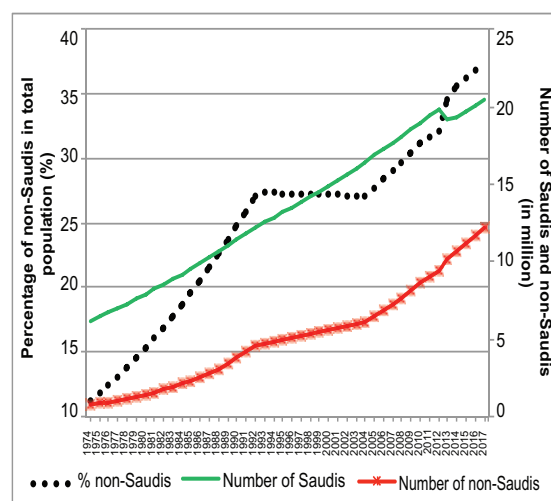
In the OECD countries, migrants from Saudi Arabia⁴⁹ and Saudi nationals are estimated to number around 185,000 and 123,000, respectively. Over half of them reside in the US and another 17 per cent in the UK alone. The large number of Saudi citizens, as compared to migrants, suggests that most Saudis abroad are not settled in their countries of residence.

INWARD MIGRATION

Stocks

In mid-2017,⁶⁷ the number of non-Saudis stood at 12,185,270 persons, or 37 per cent of the total resident population of 32,612,846.⁶⁸ Saudi Arabia's total and Saudi populations are among the fastest growing in the world: they both approximately doubled in the last two decades. However, recent readjustments to the figures of nationals on the basis of 2016's Demographic Survey suggest some degree of overestimation in earlier periods.⁶⁹

Figure 4: Saudis and non-Saudis in total resident population (mid-year estimates, 1974-2017)



Source: Central Department for Statistics and Information (CDSI)/ General Authority for Statistics (GASat).

OUTWARD MIGRATION

INWARD MIGRATION

Table 1: Stocks of emigrants from Saudi Arabia in OECD countries (c. 2016)

	Born in Saudi Arabia	Saudi nationals
E.U. + Switzerland + Norway	56,647	33,527
<i>of which the U.K. (2017)</i>	32,000	21,000
<i>France (2014)</i>	2,909	1,179
<i>Germany</i>	<i>n.a.</i>	6,207
Other OECD countries	127,895	89,067
<i>of which Canada (2011)</i>	13,515	<i>n.a.</i>
<i>Australia</i>	12,720	<i>n.a.</i>
<i>U.S.A.</i>	96,783	86,137
Total	184,542	122,594

Sources: receiving OECD countries' national statistics, International Migration Database (<http://stats.oecd.org/>) and UK National Office for Statistics. Population of the UK by country of birth and nationality: individual country data (2017)

"Other OECD countries" are: Canada, U.S.A., Australia, New Zealand, Mexico, Chile, Israel, Turkey, Japan and Korea.

As a matter of fact, students make up a large share of Saudi expatriates in Western countries: around 44 per cent in 2016–2017 in the EU, for instance.⁵⁰ According to the records of the Saudi Ministry of Education,⁵¹ Saudi students abroad are reported to number 140,000 for the academic year 2016–2017. Most (60 per cent) study in the US, around 10 per cent in the UK and 7 per cent in Canada.

Table 2: Stocks of Saudi students abroad (2016–2017)

	males	females	Total
GCC countries	2,891	4,056	6,947
<i>of which Kuwait</i>	1,496	2,650	4,146
Other Arab countries	3,690	1,229	4,919
<i>of which Jordan</i>	2,531	621	3,152
<i>Egypt</i>	780	355	1,135
Asia	2,568	870	3,438
<i>of which China</i>	634	96	730
<i>Malaysia</i>	731	237	968
Europe	12,759	8,942	21,701
<i>of which the U.K.</i>	8,178	6,218	14,396
America and Oceania	78,010	24,899	102,909
<i>of which Australia</i>	5,806	1,550	7,356
<i>Canada</i>	7,253	2,765	10,018
<i>U.S.A.</i>	63,832	20,315	84,147
Total	99,918	39,996	139,914

Source : Saudi Ministry of Education, section "Higher Education Statistics" The table refers to all the students enrolled that year (muqayydoon), from undergraduate to PhD levels.

Like elsewhere in the region, as of 2017,⁷⁰ the profile of the foreign population is that of a predominantly male (217 men for 100 women) and demographically distorted group: those in working-age groups (15 to 64 years) were overrepresented and formed 83 per cent of all non-nationals. Sixteen percent were highly-educated (BA and above), while the low-educated (below secondary level education) made up 56 per cent of the non-nationals above 15 years of age mid-2016.⁷¹ That year, 27 per cent of foreign residents were out of the labour force, of whom 22 per cent were students. Among females, 77 per cent were recorded as inactive. Of all resident foreign women, 66 per cent were classified as housewives,⁷² which suggests that family reunion is not infrequent in the country, so far. This is confirmed by the share of the youth (0–14 years) in the foreign population (15 per cent), which is higher in Saudi Arabia than in most GCC states.⁷³

During the first quarter of 2018, 10,183,104 non-Saudis were employed (9,231,869 males and 951,235 females), making up 76 per cent of the total employed population, outside the security services.⁷⁴ Down from 69.3 per cent in 2009, the government sector employed 37.4 per cent of Saudi nationals early 2018. Non-nationals were concentrated in the private sector (76 per cent) and in the domestic sector (23.5 per cent of all employed foreign nationals; 75 percent of employed foreign females). Expatriates made up 80 per cent of the private sector's total labour force that year.

In terms of their activity, the bulk of foreign labourers in the private sector were working in construction (44 per cent), in trade (25 per cent), in manufacturing and in the financial, insurance, real estate and business services (9 per cent each). As regards their occupational distribution in the

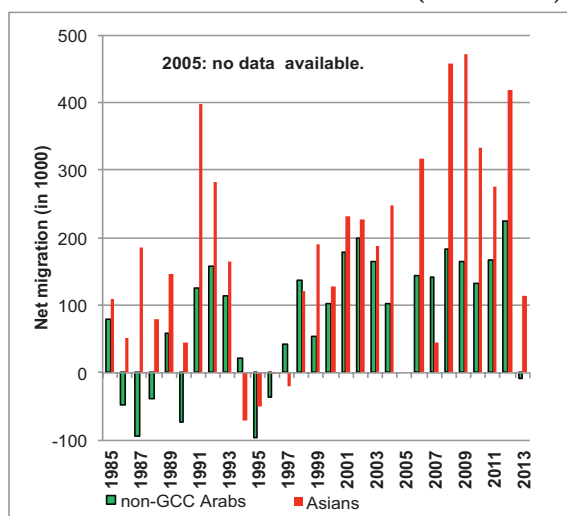
OUTWARD MIGRATION

Saudi students, among whom 60 per cent are male, thus account for the bulk of Saudis abroad. From a low of 12,800 in 2002–2003 following the September 11 attacks, the number of Saudi students abroad peaked in 2015 but has gone down since then, following the fall in oil prices and ensuing budget cuts.⁵² During the academic year 2016–2017, 83 per cent of students abroad had government scholarships. However, the King announced the inclusion of all Saudi students enrolled in top universities abroad in the scholarship programme.⁵³

Flows

Cross-border movements of Saudi nationals are not accounted for in the Kingdom’s statistics of entries and exits. However, incoming and exiting foreigners are recorded by country of citizenship. Though probably marked by a degree of inaccuracy and under-registration of events, these records are the only source available to draw broad estimates of the nationality distribution of migrant flows to and from Saudi Arabia until 2013 (last available data broken down by nationality as of August 2018).

Figure 1: Net migration flows of Arab and Asian nationals to Saudi Arabia (1985–2013)



Source: Ministry of Interior, General Directorate of Passports.

INWARD MIGRATION

private sector, most were confined to the lowest “blue collar” categories (‘engineering support’ and ‘services’: 78 per cent). However, non-nationals also constituted 61 per cent of all ‘highly-skilled’ labourers in the sector.⁷⁵

Of the 1.7 million male expatriates in the domestic sector, 81 per cent (1,363,324) were employed as drivers. Another 14 per cent were employed as “servants and house cleaners.” This category concentrated 96 per cent of the 710,381 females employed in the sector.⁷⁶

Saudi authorities conceal data pertaining to the nationality of foreign residents in official publications, for fear that the numeric domination of some nationalities would encourage socio-political claims. Unlike during the 2013 campaigns, which were accompanied by frequent releases of official figures of national expatriate communities in the press, only very few estimates trickled down in the Saudi press during the 2017 amnesty campaign. Moreover, the rare estimates available from other sources are puzzling (Table 3).⁷⁷

Table 3: Some estimates of non-nationals by country of citizenship (Saudi Arabia, 2017–2018)

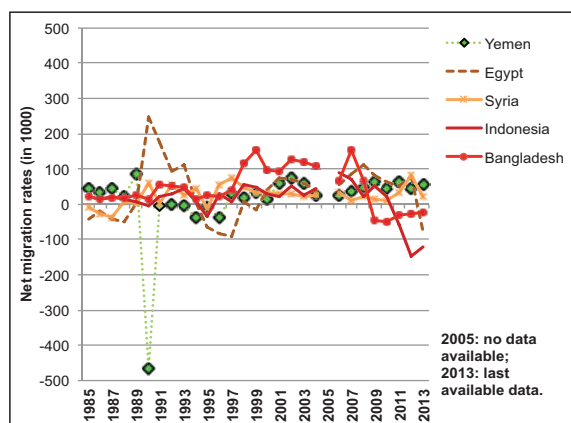
Country of citizenship	lower est.	upper est.
1 India	2,266,216	3,200,000
2 Pakistan	1,343,737	2,700,000
3 Bangladesh	1,157,072	2,100,000
4 Egypt	871,621	2,900,000
5 Syria	745,580	2,480,000
6 Yemen	697,296	> 700,000 (workers?)
7 Philippines	583,985	1,500,000–1,800,000
8 Indonesia	470,000	1,548,032
9 Nepal		455,905
10 Sudan	435,810	470,000
11 Afghanistan	300,000 (workers)	435,810
12 Sri Lanka	200,000	650,000
13 Palestine (holders of travel documents)	n.a.	n.a.
14 Burma (Myanmar)		242,510
15 Jordan	217,904	400,000
16 Ethiopia	148,753	>400,000
17 Lebanon	139,459	210,000

Source: Various (see endnote).

OUTWARD MIGRATION	INWARD MIGRATION
<p>The shift in recruitment policies towards favouring Asian labourers over Arabs in the late 1980s is clearly evident in Figure 1⁵⁴ and so is the post-Gulf War I deep economic downturn, which led to a general reverse of migration flows. Since the late 1990s, the Arabs' net migration flows to the Kingdom seem first to have stalled, before increasing after 2005, together with oil prices. These escalated further until 2013, beyond \$110 per barrel; consequent public and private expenditure explains the hike in Arab and Asian net immigration over the 2000s and early 2010s. However, the effect of the large-scale crackdown conducted that year against foreign residents in irregular administrative situation is visible in the collapse of net migration rates, especially among Arab nationals.</p> <p>Indeed, economic fluctuations do not fully explain expatriates' mobility. Security concerns and political events (conflicts, diplomatic tensions or upturns) do have an immediate effect on cross-border movements. These events, furthermore, have a selective impact and affect certain nationals more than others.</p> <p>In the aftermath of Iraq's invasion of Kuwait in August 1990, some 800,000 Yemenis (of whom, a half had been living in Saudi Arabia for twenty years and more, and up to 20 per cent was born there) fled the Kingdom in a mass exodus. Newly unified Yemen was accused to have sided with the pro-Iraqi camp, even as tensions were already mounting between the two countries over border disputes and other issues.</p>	<p>The World Bank estimated the top three remittance beneficiaries from Saudi Arabia in 2017 as: India (\$11.2 billion), Egypt (\$7.7 billion), and Pakistan (\$5.8 billion), followed by the Philippines (\$3.7 billion), Indonesia (\$3.4 billion) and Bangladesh (\$3.3 billion).⁷⁸ It is thus likely that these nationalities are effectively among the most represented in the Kingdom's foreign workforce as well as resident population.</p> <p>Beyond the issue of numbers, little is also known about the socio-economic profile of foreigners by nationality. It is expected that Indians, in view of their vast numbers, would occupy posts at every level of the occupation ladder. Egyptian workers, who numbered 968,000 at the end of 2013, according to Saudi official figures, were said to represent about 40 per cent of the total Arab expatriate workforce that year.⁷⁹ Predominantly males (98.7 per cent), their five most common occupations were: general accountant, marketing specialist and livestock and agricultural jobs. This indicates that most Egyptian workers in Saudi Arabia are skilled and low-skilled, with income below the threshold allowing for family reunion.</p> <p>More surprisingly, Saudi Arabia claimed that it hosted refugees among its expatriates.⁸⁰ In 2017, the King Salman Center for Relief and Humanitarian Aid was said to be aiding 603,833 Yemeni refugees with their families. Among Syrians, official figures of assisted "guests" amounted to 291,342, able to live and work in the Kingdom. Under the support scheme, 114,000 Syrian students were enrolled in government schools.⁸¹ Therefore, the upper estimate of Syrians' numbers in Table 3 (2.48 million) seems too high. This figure is similar to the number of de facto refugees Saudi Arabia claimed it had received since the beginning of the Syrian war.⁸²</p>

OUTWARD MIGRATION

Figure 2: Net migration flows from Saudi Arabia (selected nationalities, 1985-2013)



Source: Ministry of Interior, General Directorate of Passports.

In that context, Saudi authorities decided to enforce policy reforms passed before the war. Yemenis were stripped of privileges they had enjoyed so far, unlike other foreign nationals: the right to set up companies in Saudi Arabia with no Saudi majority ownership and the right to work without obligation to obtain work permits and local sponsors.⁵⁵ Moreover, some Yemenis lost the Saudi passports they had acquired before and hence fell into the ranks of the Bidun (stateless population) of Saudi Arabia.⁵⁶

In stark contrast to the Yemenis, the figures point at the sizeable inflow of Egyptians during the period 1990-1993. As a matter of fact, Egypt was part of the allied coalition against the Iraqi regime during Gulf War I. Egyptian nationals arrived in Saudi Arabia in vast numbers during the oil boom of the 2000s and early 2010. However, the brutal drop in their numbers (negative net migration in 2013, last available data), suggests that they have been disproportionately affected by the security crackdown of late 2013.⁵⁷

Diplomatic crises also entailed shifts in migration flows. As international concern grew over wide-scale mistreatment of Asian domestic

INWARD MIGRATION

Cutting across irregular and regular and all other categories of migrants, lies another question crucial to Saudi Arabia's demographic future: that of the second- and even third-generation expats born in the Kingdom to foreign and to Saudi mothers. They are considered foreigners even if they have spent all their life in Saudi Arabia and foster no ties with their country of citizenship (if any, in the case of Palestinians, for instance). While there is no data to precisely evaluate their number, estimates range from one to two million. The figure of 30,000 third-generation Saudi-born Indians living in the Kingdom was also circulated in the press in 2013.⁸³

Flows

In the context of Saudisation and irregular residency correction campaigns, many advocate a massive naturalisation of Saudi-born aliens and children of Saudi mothers.⁸⁴ Beyond considerations of social justice, such a move would effectively help the private sector reach its Saudisation quotas.

Naturalisations have indeed been performed in the past. Available data, however, show that it benefitted small numbers.⁸⁵

Naturalised aliens were most often Arabs (80 per cent and more), with a vast majority among them being Yemenis, Egyptians and Syrians. Moreover, after the late 1980s, naturalisations were increasingly confined to females. This suggests that targeted beneficiaries became mostly spouses of Saudi men.

Indeed, so far, the right of blood (*jus sanguinis*) and marital ties still exclusively prevails over birth (*jus soli*) on Saudi territory. Most recent amendments to residency rules are, again, circumscribed to the sponsorship issue and only concern Saudi citizens' foreign family

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workers in Saudi Arabia, the execution of an Indonesian woman spurred a diplomatic crisis between the two countries; Indonesia banned workers from going to the Kingdom in August 2011. Figure 2 actually emphasises the partial reversal of the Indonesians’ rate of migration to Saudi Arabia after 2010. The negative net migration inflows (more exits than entries) of Bangladeshis after 2009 is also explained by a political decision: a ban on the recruitment of these nationals was announced in 2008, under the argument that they outnumbered their numeric quotas in the Kingdom.⁵⁸ The ban was lifted in 2016.⁵⁹

As for Syrian nationals, their migration inflows have remained steadily positive since 1990. Following the breaking out of the Syrian conflict in 2011, net inflows went up markedly (from +35,000 in 2011 to +82,000 in 2012) but dropped to +22,000 in 2013. This casts a doubt on Saudi claims that the Kingdom received no less than 2.5 million refugees from the Syrian war,⁶⁰ even if some measures were indeed taken to protect Syrian nationals in the country.⁶¹

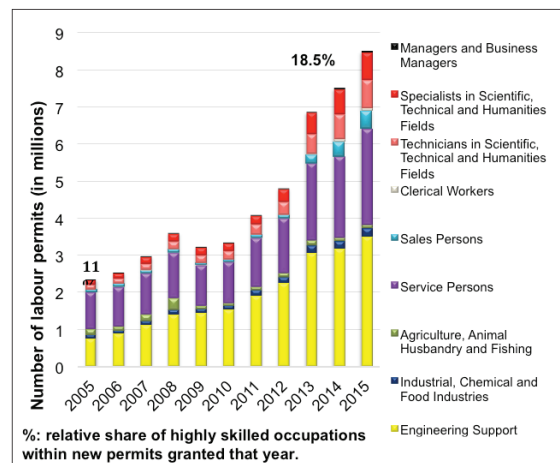
However, the most massive population displacement across Saudi borders in the country’s history may well result from the large-scale operations against undocumented and irregular workers and residents conducted in 2013 and 2017, coordinated by several governmental bodies including the Ministries of Labour and Interior. The campaigns targeted foreigners with no or expired residency or work permits, those working for an employer other than their sponsor, those operating in a trade other than that described on their iqama (residency permit), as well as those who entered illegally, overstayed Hajj and Umrah travel documents, or others who were caught trying to exit the Kingdom.

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members. In early 2013, Saudi women married to non-nationals earned the right to sponsor their children for residency as well as for work in the private sector; they can also sponsor their foreign husband for the latter. In addition, since September 2013 non-Saudi mothers of Saudi children are allowed permanent residence in Saudi Arabia without sponsor, with access to education and health services. Yet, the possibility for children of Saudi women married to foreigners to qualify for Saudi nationality is still at the forefront of debates in 2018.⁸⁶

In 2004, the government amended the Naturalisation Law to permit some long-term residents (10 years of continuous residency) to apply for citizenship, with priority given to those with degrees in certain scientific fields. No data exists so far to assess how many highly-skilled professionals subsequently used this option to settle in Saudi Arabia.

Figure 5: Inflows of foreign workers to Saudi Arabia by occupation category of labour permit (2005-2015)

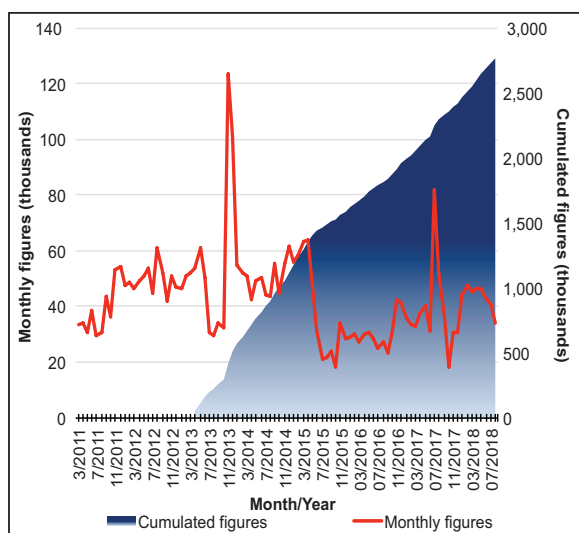


Source: Ministry of Labour, Saudi Arabia.

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<p>The amnesty period of April 3 to November 3, 2013 resulted in almost 10 million operations of migration status corrections,⁶² the registration of one million workers as “runaways” and the final exit of about 800,000 more.⁶³ Some were deported (among them at least 200,000 Yemenis and 140,000 Ethiopians).⁶⁴ These two nationalities, along with Egyptians, as suggested earlier, were particularly targeted by deportations. Diplomatic negotiations rescued other, more numerous nationals from final deportations.⁶⁵</p> <p>Following the expiry of the amnesty period in November 2013, large-scale systematic raids on labour sites by the Ministry of Labour as well as massive rounding up operations by the police in areas inhabited by foreigners were conducted. During the months of November and December 2013, 123,000 and 100,000 deportations, respectively, were recorded by the Saudi Interior Ministry.</p> <p>Of the 758,570 undocumented expatriates who exited during the amnesty period of April to November 2017, the majority (20 per cent) were Pakistanis, 12 per cent were Egyptians, 10 per cent Ethiopians, 10 per cent Indians, 8 per cent Moroccans, 7 per cent Bangladeshis, 6 per cent Sudanese, 6 per cent Yemenis, 4 per cent Turks, 4 per cent Algerians; and 2 per cent Indonesians, Filipinos and Iraqis. According to official statements, these workers were to leave voluntarily, hence not be deported as criminals and barred from coming back legally. However, a peak of deportations (82,000) was witnessed in July 2017 (Figure 3). This suggests a differential treatment by nationality, with Ethiopians and Yemenis, probably given less time and opportunities to leave voluntarily and return.⁶⁶</p>	<p>If one observes the flows of foreign workers joining the Saudi labour market since the mid-2000s⁸⁷ (Figure 5), there are signs of a significant upgrading of the workforce’s qualifications. Workers in highly-skilled categories (the three upper categories of occupation, ranging from “Technicians” to “Managers”) grew in relative share over the period, from 11 to 18.5 per cent of all labour permit holders employed in the private sector.⁸⁸ Low-skilled labourers⁸⁹ also gained during the decade, from 33 to 50 per cent of all new permits granted in 2011, but their share has been decreasing since then.</p> <p>Absolute figures also show that the number of labour permits issued almost quadrupled between 2005 and 2015, before slightly decreasing to 8.25 million permits for the year 2016.⁹⁰ The upward trend culminated in 2015: until that year, the Labour Ministry also gave a green light to rising numbers of work visas (new arrivals)⁹¹ in all sectors, especially the private sector (Figure 6). Large inflows of workforce were needed to achieve the massive infrastructure projects undertaken during the oil-boom of the 2000s. The movement of visas suggests that hiring policies were not immediately affected by the oil slump observed after 2014.</p>

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Figure 3: Deportations of irregular residents from Saudi Arabia by month (3/2011 to 8/2018)

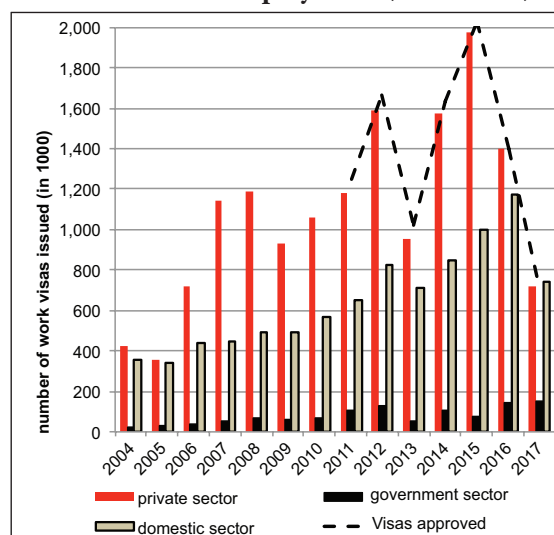


Source: Ministry of Interior.

Cumulated figures of deportations carried out by the Ministry of Interior since the onset of the first anti-irregular campaign in April 2013 indicate that approximately 2.7 million expatriates have left the country by force, until mid-2018. Saudi Arabia being the first source of remittances for many Arab and Asian countries, such deportations may have significant economic consequences on their fragile economies. Yet, the progressive tightening of administrative regulations pertaining to the entry, stay and activity of expatriates and their dependents since 2011 (from Nitaqat measures to the recent expatriates' levies and dependents' fees) significantly increased outflows in general. In 2017, for the first time since 1985, net migration rates from Saudi Arabia are negative: -914,155. This suggests that many countries will be affected by the new Saudi migration and labour policies. Besides poor Asian and African states, Egypt, and comparatively more wealthy countries such as Jordan and Lebanon, were also dependent on emigration to Saudi Arabia as an outlet for highly-educated unemployed or underpaid citizens.

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Figure 6: Labour visas approved by the Saudi Ministry of Labour, and labour visas issued for each sector of employment (2004-2017)



Source: Ministry of Labour.

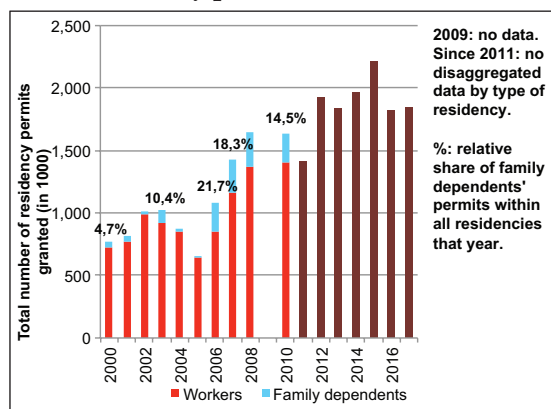
From a high of 3,048,203 work visas issued in 2015, the figures dropped sharply to 1,617,959 in 2017. The number of visas approved by the Ministry of Labour also dropped by more than a half in two years. The fall is due to a slashing of foreigners' recruitment in the private sector, in line with the toughening of the Nitaqat campaign of labour nationalisation. Saudi Arabia has become less attractive for foreign workers; for instance, "the pace of migrant worker deployments from Bangladesh slowed in February 2018, due to lower outflows to Saudi Arabia. (...) Deployments of Pakistani workers to Saudi Arabia in the first six months of 2017 was just 17 per cent of the total workers who went to the kingdom in 2016 (77,600 in January–June 2017 vs. 462,598 in 2016, 522,750 in 2015 and 462,598 in 2016; 89,624 registered for Saudi Arabia up to July 2017."⁹² Moreover, the numbers of non-Saudis in the private sector decreased from 9 million in 2016 to 8.3 million in 2017.⁹³ About 1.2 million exit visas were delivered that year.⁹⁴ Interestingly, the labour visas issued to

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domestic workers have not decreased much since the mid-2010s. This is perhaps a measure meant to keep up Saudi families’ standard of living, amid the current economic slowdown.

Figure 7: Flows of foreign residents by type of residency permit held (2000-2017)



Source: General Directorate of Passports, Ministry of Interior.

Expectedly, the number of residency permits granted by the Saudi Interior Ministry also started decreasing, after trebling in fifteen years from 765,903 in 2000 to 2,212,635 in 2015. Over the 2000s, the share of “dependents” increased notably among permit holders as a whole (no disaggregated data after 2011). Knowing that in Saudi Arabia, only managerial-level professionals can apply for a permanent family visa, this confirms that highly-skilled non-Saudis also benefited from the hike in labour import after 2005.

Regarding future flows of foreign labourers to the Kingdom, it remains to be seen which way the current employment reform measures and raids against illegals will restructure the Saudi labour market. It is likely that, besides reducing the number of foreign workers, it may change the nationality and skills profile of future flows of foreigners to the Kingdom.

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Endnotes

1. Pew Forum on Religious & Public Life, *The Future of the Global Muslim Population, Projections for 2010–2030* (Washington, DC: Pew Research Center’s Forum on Religion and Public Life, 2011).
2. General Authority for Statistics (GASat)’s estimate for mid-2017.
3. World Bank, Remittance data outflows, April 2018 revision. Last available data as of mid-2018. Estimated outward flow for 2016: \$38 billion.
4. Saudis are allowed to sponsor a certain number of work visas with the intention that they employ the foreigners they sponsor. In some cases, the Saudi national sponsors the foreigner but leaves him/her responsible for finding employment and charges fees in return for the sponsorship.
5. To date, Saudi Arabia has conducted five censuses – in 1962; 1974; 1992; 2004 and 2010. The first Saudi census (1962) is usually not used, as it did not cover the whole resident population. The 1974 census was the first comprehensive one in Saudi history. However, its rate of coverage and accuracy of data are considered weak. In 1992, census population figures, along with ensuing estimates of Saudi population and rates of demographic growth for the following years, were probably inflated (see O. Winckler, “The Surprising Results of the Saudi Arabian 2004 Demographic Census,” *IJMES*, no. 40, 2008, pp. 12-15). Between 2004 and 2010 censuses, Saudi population figures seem consistent with natural increase figures. As for non-national population, because it should not be acknowledged to be too high and a part of it is illegal, it may be underestimated in official counts. It is also to be noted that the 2010 (last census) final results have been released only recently, years after the conduct of the census. Moreover, they do not really match with later population counts (2016’s Demographic Survey - see “Inward Migration”).
6. The Iranian Revolution and the seizure of the Grand Mosque in Mecca by Islamist extremists.
7. Oil prices went up from a low of \$13 per barrel in 1998 to almost \$100 in 2008, then peaked again between 2011 and 2013 at \$110 and beyond (nominal prices). See <http://www.bp.com/en/global/corporate/energy-economics/statistical-review-of-world-energy/downloads.html>.
8. Such as the King Abdullah Scholarship Programme launched in 2005, then restructured in 2015 under the title “Your Job First And Then Your Scholarship Program” (<https://www.moe.gov.sa/en/studyaboard/The%20CustodianOfTheTwoHolyMosquesOverseasScholarshipProgram/Pages/YourJobFirstAndThenYourScholarshipProgram.aspx>). This programme aims at encouraging young Saudis to acquire world-class academic training in scientific and related specialities (medicine, engineering, law, accounting, and marketing, for instance) in overseas universities, so as to upgrade the skill level of future Saudi manpower in line with international standards. The programme started with the US and was later expanded to other countries. This programme and other incentive schemes provide generous financial support to Saudi students as well as to spouses or family members accompanying them.
9. Since October 2002, all visas and work permit applications have to be approved by the Ministry of Labour. The Saudi statistical apparatus was also developed to meet new needs in terms of production and dissemination of periodic statistical data.
10. This is tempered by the fact that Saudi women have a low rate of activity: 15.2 per cent only, and 30.9 per cent for the most active age group, that of 30-34 years.

All rates are calculated for the age group 15 to 64 years, in order to allow for international comparison. Activity rates are the ratio of persons in the labour force (employed+unemployed) to the total population for the given age groups.

11. Demographic growth having decreased the state's redistributive capacities, the difference is now between the well-connected, part of clientele networks, and the others, leading to "discriminatory clientelism" (S. Hertog, "Segmented Clientelism: the Political Economy of Saudi Economic Reform Efforts," in *Saudi Arabia in the Balance*, eds. P. Aarts and G. Nonneman (London: Hurst and Co, 2006, p. 120).
12. Enacted in 1994, Resolution 50 compelled firms to increase the number of Saudi employees by 5 per cent a year, so that in 2001 most private sector firms would have 25 per cent Saudi workers. The Seventh Five-Year Plan (2000-2004) sets a target of 51 per cent maximum of immigrants in the private sector and Saudis were to constitute at least 30 per cent of the manpower in companies of more than 20 employees. Throughout the 2000s, foreign workers were phased out of several employment sectors. See also "2009 Saudi Employment Strategy," <http://portal.mol.gov.sa/en/AboutMinistry/Pages/Strategy.aspx>.
13. Peck, Jennifer R. "Can Hiring Quotas Work? The Effect of the Nitaqat Program on the Saudi Private Sector" (April 2014).
14. <https://stepfeed.com/expats-in-saudi-arabia-will-only-be-allowed-to-obtain-1-year-work-visas-9895>.
15. <https://www.ey.com/gl/en/services/people-advisory-services/hc-alert--saudi-arabia-revises-nitaqat-system-and-introduces-mandatory-saifi-program-as-part-of-its-saudization-drive>.
16. Among which human resources personnel, receptionists, accountants and civil security guards. <http://qsaudi.com/list-professions-reserved-for-saudis/>; <http://qsaudi.com/19-iqama-professions-not-renewed/>. Under a new phase of the programme, launched in September 2017, the Ministry of Labour and Social Development (MLSD) began nationalising jobs in the gold and jewellery industry, making it illegal to employ foreigners in this sector.
17. Watch shops, optical stores, medical equipment stores, electrical and electronics shops, outlets selling car spare parts, building material shops, outlets selling all types of carpets, automobile and mobile shops, shops selling home furniture and readymade office material, sale outlets of readymade garments, children's clothes and men's supplies, household utensils shops and pastry shops (<http://saudigazette.com.sa/article/527249/SAUDI-ARABIA/12-activities-off-limits-for-non-Saudis>). However, some reduction of the Saudisation targets are being considered, in view of the economic consequences of rapid job nationalisations (<http://www.saudi-expatriates.com/2018/07/saudi-to-reduce-saudization-targets-in-retail-sectors.html>).
18. <https://stepfeed.com/saudi-arabia-s-public-sector-will-fire-all-expat-workers-within-3-years-9052>.
19. <https://stepfeed.com/expats-in-saudi-arabia-will-only-be-allowed-to-obtain-1-year-work-visas-9895>.
20. SR400 per month per expat worker for companies where expats outnumber Saudis and SR300 per month per expat worker for companies where expats and Saudis are in equal number (<http://saudigazette.com.sa/article/528612/SAUDI-ARABIA/Cancel-expat-levy-JCCI-tells-ministry>).
21. The fee starts at SR100 for each individual dependent per month. The monthly fee is set to increase to SR200 for each dependent from July 2018, SR300 in 2019 and SR400 in 2020. Dependents include the expat sponsor's wife, children, parents, in-laws, maids and drivers who are registered under his name (<http://gulfbusiness.com/expat-dependent-fee-takes-effect-in-saudi-arabia/>).
22. <http://www.arabnews.com/node/1348336/saudi-arabia>.
23. <https://www.relocatemagazine.com/saudi-arabia--saudization-brings-major-visa-changes>.
24. <http://www.saudi-expatriates.com/2016/10/iqama-transfer-conditions-on-nitaqat-status.html>.
25. <http://www.saudi-expatriates.com/2015/11/sponsorship-transfer-without-kafeel.html>.

26. https://www.saudiembassy.net/sites/default/files/u66/Saudi_Vision2030_EN.pdf.
27. C. Grové, “These Two High Growth Sectors Are Next in Line for Saudization,” Arabia Inc., May 2, 2016. <http://www.incarabia.com/wire/private-communications-it-sector-up-for-saudization/>
28. <https://www.dawn.com/news/653292/s-arabia-may-grant-free-visa-nationality-to-scientists>.
29. <https://english.alarabiya.net/en/News/gulf/2018/02/19/Saudi-Arabia-to-grant-free-visas-for-foreign-scientists.html>.
30. <https://saudiexpatriate.com/green-card-available-saudi-arabia-soon/>.
31. <http://www.arabnews.com/node/939276/saudi-arabia>; <http://www.saudi-expatriates.com/2017/04/saudi-green-card-is-in-its-final-stage.html>.
32. <http://english.alarabiya.net/en/views/news/middle-east/2014/03/28/Real-change-for-labor-rights-in-Saudi-Arabia-.html>. See also: F. De Bel-Air, “The Socio-Political Background and Stakes of ‘Saudizing’ the Workforce in Saudi Arabia,” Explanatory Note No. 3/2015, GLMM, <http://gulfmigration.eu>.
33. For instance, the introduction of mandatory pre-paid salary cards: <https://stepfeed.com/saudi-arabia-just-took-a-major-step-to-ensure-domestic-workers-receive-their-salaries-8755>; the dematerialisation of domestic helpers’ recruitment procedures: <https://www.albawaba.com/business/saudi-arabia-housemaid-agencies-musaned-1025276>; and the introduction of international companies in the field, deemed more accountable and better at applying ethical practices (<https://www.fdiintelligence.com/Locations/Middle-East-Africa/Saudi-Arabia/Saudi-Arabia-opens-domestic-work-agencies-to-FDI>).
34. Migrants from Sub-Saharan Africa, mostly Ethiopians, Somalis and Eritreans, cross the Red Sea to Yemen to reach Saudi Arabia. Saudis also fear drug and weapons trafficking, as well as massive economic migration from Yemen, where political chaos has deepened since the collapse of Ali Abdullah Saleh’s regime.
35. <http://www.arabnews.com/node/1071511/saudi-arabia>.
36. Egyptians, for instance: <http://www.egypttoday.com/Article/1/33701/%E2%80%98Nation-Without-Violators%E2%80%99-extended-for-illegal-Egyptians>.
37. <http://saudigazette.com.sa/article/522057/SAUDI-ARABIA/758570-visa-violators-took-advantage-of-amnesty-Interior-Ministry>.
38. <http://saudigazette.com.sa/article/541881/SAUDI-ARABIA/More-than-16-million-violating-expatriates-netted-in-nine-months>.
39. Saudi Arabia fears political destabilisation, especially since the Arab uprisings and the overthrowing of regimes in the region. The country is also a frontline actor in regional conflicts (especially in Yemen). The risk of sedition as well as infiltration of activists undertaking terrorist attacks is taken very seriously.
40. F. De Bel-Air, “Blocked Youth”: The Politics of Migration from the SEM Countries before and After the Arab Uprisings”, *The International Spectator* 53, 2018, pp. 52-73, <https://www.tandfonline.com/doi/full/10.1080/03932729.2018.1460094?scroll=top&needAccess=true>.
41. <http://www.internationalinvestment.net/regions/middle-east/expat-exodus-from-saudi-arabia-as-more-than-800000-leave-in-18-months/>.
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44. <https://www.stats.gov.sa/en/6042>.
45. <https://agsiw.org/saudi-economic-reform-update-saudization-expat-exodus/>.
46. <https://saudigazette.com.sa/article/524623/Opinion/OP-ED/We-must-put-an-end-to-fake-Saudization>.
47. For example, the housing and private education sectors: <http://saudigazette.com.sa/article/538734/SAUDI-ARABIA/Real-estate-market-hit-hard-by-mass-departure-of-expats>; <http://saudigazette.com.sa/article/542703>.
48. <https://english.alarabiya.net/en/business/economy/2015/06/14/Most-Saudis-working-in-the-Gulf-prefer-Kuwait.html>.
49. Born in Saudi Arabia. Some of them may be Saudi-born, second or third-generation third-country nationals, descendants of expatriates residing in the Kingdom.
50. Records of residency permit holders in the EU, Switzerland and Norway by purpose of permit (Eurostat database, [migr_resvalid], data for December 31, 2016).
51. Receiving countries' data (EU, for instance) shows slightly lower numbers: Saudi nationals holding residency for the purpose of education: EU: 15,189 and UK: 10,723 (Eurostat database, [migr_resvalid], data for December 31, 2016). This suggests that some students covered by Saudi scholarship programmes reside on other types of permits and that some of them may be dual nationals.
52. http://www-cdn.icef.com/wp-content/uploads/seminarprogramme/2016/miami__prov__1447__Belal-Abujami__Saudi-Arabia's-Scholarship-Program---2016-Updates.pdf.
53. <https://english.alarabiya.net/en/News/gulf/2018/03/28/Saudi-students-paying-for-studies-abroad-to-be-included-in-scholarship-program.html>.
54. Figures of entries and exits for Sudan are not included in the calculation of Arab nationals' net migration rates, for they seemed flawed.
55. N. Van Hear, *New Diasporas. The Mass Exodus, Dispersal and Regrouping of Migrants Communities* (London: UCL Press, 1998), pp. 86-93.
56. Saudi Arabia does not allow dual nationality. Becoming Saudi implies renouncing one's first citizenship.
57. F. De Bel-Air, "Policies and Politics in the Arab Migration to the Gulf States: Struggling to Keep the Door Open," In *Migration to the Gulf: Policies in Sending and Receiving Countries*, edited by Philip Fargues and N. M. Shah (Cambridge: Gulf Research Centre, June 2018), http://gulfmigration.org/publications/book_grm2017/.
58. <https://www.arabianbusiness.com/saudi-shuns-bangladeshi-labour-ban-confirmed-51923.html>.
59. <https://www.reuters.com/article/bangladesh-saudi/saudi-arabia-lifts-ban-on-bangladeshi-workers-after-seven-years-ministry-idUSL3N1AS3NP>.
60. <http://www.arabnews.com/featured/news/805236>.
61. F. De Bel-Air, "A Note on Syrian Refugees in the Gulf: Attempting to Assess Data and Policies," Explanatory Note No. 11/2015, GLMM, <http://gulfmigration.eu>.
62. The figure indicates the number of administrative operations performed, not the number of persons concerned: one worker may have changed profession and also switched sponsorship, for instance.

63. Final results of 2013's amnesty as announced by the Ministry of Labour. See <http://gulfmigration.org/saudi-arabia-amnesty-of-2013-april-3-to-november-3-number-of-work-status-corrections-by-type-and-sector-final-results/>.
64. Stateless persons (Biduns and Palestinians, for instance) as well as citizens from some war-torn countries (Syrians, Burmese) were exempted from deportation.
65. Indians, for instance, who were the most numerous expatriates (around 2.8 million) in Saudi Arabia, had only around 130,000 deportations (https://www.business-standard.com/article/news-ians/130-000-indians-return-from-saudi-arabia-113110601019_1.html).
66. Ethiopians and Yemenis suffered disproportionately during 2017's crackdown (<https://gulfnnews.com/news/gulf/saudi-arabia/77-of-illegal-expats-in-saudi-arabia-are-yemeni-1.2139937>). According to the International Organization Migration, almost 100,000 Ethiopians left forcibly or voluntarily between April and July 2017, the amnesty expiration deadline set for these nationals (<https://www.voanews.com/a/ethiopian-migrants-report-abuse-during-saudi-arabia-deportations/4182407.html>).
67. Last available data as of September 2018.
68. Population estimates based on the results of the Population Census (1974, 1992, 2004, 2010) and estimates based on the Demographic Research Bulletin 2016 from year 2013-2017. Mid-year population estimates by nationality (nationals/non-nationals) since 1974 are computed by the Central Department for Statistics and Information (CDSI), renamed General Authority for Statistics (GASat) since October 2015. They are only published in the Saudi Arabia Monetary Authority (SAMA)'s *Statistical Yearbooks* and Annual Statistics. The time-series show that after each census and 2016's Survey, the Statistics Authority readjusts past figures for Saudi and non-Saudi populations, intercensal data, as well as data for census years. Therefore, mid-year estimates differ significantly from available census figures. The shift in the number of Saudis after 2013, and the consequent change in the share of non-Saudis reported in the population, is also explained by this methodology of estimating population figures.
69. This is in line with the "flickering" nature of Saudi population data, documented in O. Winckler, *Arab Political Demography. Population Growth, Labour Migration and Natalist Policies* (Brighton/ Portland, Sussex Academic Press, 2009, 2nd edition), p. 25.
70. GASat. Population Characteristics Survey 2017.
71. <http://gulfmigration.org/saudi-arabia-population-aged-15-nationality-saudi-non-saudi-sex-education-level-august-2016/>.
72. <http://gulfmigration.org/saudi-arabia-population-nationality-saudi-non-saudi-sex-relation-labour-force-august-2016/>.
73. <http://gulfmigration.org/gcc-national-non-national-populations-aggregated-age-groups-gcc-countries-national-statistics-2005-2016/>.
74. Population aged 15 and more. *Labour Force Survey 2018 (Q1)*, GASat, <https://www.stats.gov.sa/en/814> (last data available as of September 2018).

Data on employment are administrative data: they are taken from the records of the General Organisation for Social Insurance (GOSI), which covers private sector workers, of the Ministry of Civil Service (government sector), and from the Ministry of Labour and Social Development (MLSD), which deals with domestic labourers. Figures of the total labour force are taken from Labour Force Surveys conducted by GASat (partly observed data), but they are lower than the employment figures. Labour Force Surveys' publications, therefore, include administrative data since Q3 2016.

Unlike data stemming from Labour Force Surveys, used until 2016, the administrative data do not include employees in the security and military sectors and those non-registered in the records of GOSI and MCS. Since about a half of Saudis (males) were employed in these sectors as of the mid-2010s, administrative figures overestimate the share of foreign residents in the labour force.

75. Those classified in the three highest categories of occupations: the “Lawmakers, Directors and Business Managers”; “Specialists in Professional, Technical and Humanitarian Fields” and “Technicians in Professional, Technical and Humanitarian Fields.”
76. *Labour Force Survey 2018 (Q1)*, GStat, <https://www.stats.gov.sa/en/814> (last data available as of September 2018). Ministry of Labour and Social Development (MLSD)’s records for the period.
77. Estimates have been collected from the UN database, Saudi press sources quoting Saudi officials and foreign diplomatic missions, as well as authorities from sending countries. The exact origin of the estimate (stocks of permit holders from receiving or sending country, consular records, estimates drawn from expatriates’ surveys conducted in origin countries, rough guess) was not disclosed in any of the sources nor was it inscribed in a specific period (before/after the crackdowns and the deportations, for instance). Therefore, the gaps between lower and upper estimates are sometimes very large. However, our opinion is that UN data (2017 revision) are too low to be consistent with the increase in the amount of remittances since 2012, for instance. On the other hand, the upper estimates are too high to be consistent with Saudi official data, even after taking into account the presence of undocumented residents.

Sources for Table 3:

1	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision; http://www.arabnews.com/node/1192131/saudi-arabia
2	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision; http://saudigazette.com.sa/article/531055 ; https://arynews.tv/en/2-7-million-pakistanis-living-saudi-arabia/
3	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision; http://www.theindependentbd.com/post/142680 ; https://www.reuters.com/article/bangladesh-saudi/saudi-arabia-lifts-ban-on-bangladeshi-workers-after-seven-years-ministry-idUSL3N1AS3NP
4	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision; http://www.arabnews.com/news/483296 ; http://english.ahram.org.eg/NewsContent/3/12/87637/Business/Economy/Thousands-of-Egyptians-facing-visa-troubles-in-Sau.aspx
5	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision; https://www.globalmediainsight.com/blog/saudi-arabia-population-statistics-2018/
6	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision; https://www.reuters.com/article/us-yemen-security-saudi-migrants/u-n-urges-saudi-arabia-not-to-deport-yemeni-migrants-to-war-zone-idUSKBN1IA1F7
7	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision; http://www.arabnews.com/node/1259591/middle-east
8	https://www.globalmediainsight.com/blog/saudi-arabia-population-statistics-2018/ ; UN/DESA. Migrant Stock By Origin And Destination, 2017 revision.
9	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision;
10	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision; https://www.globalmediainsight.com/blog/saudi-arabia-population-statistics-2018/

11	https://www.pajhwok.com/en/2017/11/22/passports-being-distributed-afghans-saudi-arabia/ ; UN/DESA. Migrant Stock By Origin And Destination, 2017 revision
12	http://www.arabnews.com/node/1048796/saudi-arabia/ ; https://www.globalmediainsight.com/blog/saudi-arabia-population-statistics-2018/
13	n.a.
14	UN/DESA. Migrant Stock By Origin And Destination, 2017 revision;
15	UN/DESA. Migrant Stock By Origin And Destination, 2017; http://www.ammonnews.net/article/237713 (2015 estimate).
16	UN/DESA. Migrant Stock By Origin And Destination, 2017; http://www.africanews.com/2017/07/26/ethiopia-confirms-30-day-amnesty-extension-for-illegal-migrants-in-saudi/
17	UN/DESA. Migrant Stock By Origin And Destination, 2017; https://stepfeed.com/10-biggest-lebanese-diaspora-communities-4373

78. World Bank. Bilateral Remittances Matrix 2017, revision April 2018.
79. Which means that Arab labourers numbered around 2.42 million that year, making up 40.3 per cent of the 6,003,616 expatriates employed in the Kingdom during the period (*Labour Force Survey* 2013, Round 2).
80. The GCC states are not signatories to the 1951 Convention relating to the Status of Refugees and its 1967 Protocol and, thus, do not recognise “refugees” as a legal category. “De facto” refugees must enter these countries in accordance with common visa and residency regulations, as labourers, family dependents, students, etc.
81. https://www.saudiembassy.net/sites/default/files/FS_Aid.Refugees_April17.pdf.PDF; <http://www.arabnews.com/node/1095621/saudi-arabia>.
82. F. De Bel-Air, “A Note on Syrian Refugees in the Gulf: Attempting to Assess Data and Policies,” Explanatory Note No. 11/2015, GLMM, <http://gulfmigration.eu>.
83. <http://www.arabnews.com/news/485266>; <http://www.arabnews.com/saudi-born-arab-expats-stuck-between-rock-and-hard-place> quoted a figure of “over 2 million” Saudi-born foreign residents, stemming from CDSI.
84. <http://saudigazette.com.sa/article/520159>
85. <http://gulfmigration.org/naturalisations-by-sex-saudi-arabia-1974-2000/>. They never accounted for more than 0.03 per cent of the rates of population increase over the years. No data on naturalisations is published after 1420H (1999-2000AD). That year, they culminated with 4,699 citizenship acquisitions, 903 having benefitted males and 3,766 females.
86. <https://gulfnews.com/news/gulf/saudi-arabia/debate-heats-up-over-saudi-mothers-passing-on-citizenship-1.2174204>.
87. It should be known, however, that figures of permits issued comprise new, first documents as well as renewals and changes of profession and sponsor.
88. Private sector, Ministry of Labour records. The data is unavailable after 2015.
89. Those in the two lowest categories of occupations, the “Engineering Support” and “Industrial, Chemical and Food Industries” categories.
90. <http://www.arabnews.com/node/1152251/saudi-arabia>. The hike in the numbers of permits between 2011 and 2015 is also due to sponsorship and profession changes.

91. The labour visa allows the worker to enter Saudi Arabia. It is issued by the Ministry of Foreign Affairs after acceptance of the worker's application file by the Ministry of Labour, upon a request from his/her prospective sponsor. The work visas are more than the actual workers present in the country, as some eventually do not complete the procedure, or are rejected at a later stage (entry visa; residency procedures etc.).
92. World Bank and Knowmad, "Migration and Remittances - Recent Developments and Outlook," Migration and Development Brief no.29, April 2018, p. 33.
93. <http://gulfmigration.org/saudi-arabia-private-sector-employees-by-nationality-saudi-non-saudi-and-sex-2005-2017/>.
94. Saudi Arabia does not disclose figures of exit visas in statistical publications.

About the Author



Françoise De Bel-Air (Ph.D.) is a researcher and consultant based in Paris, France. A socio-demographer by training, she specialises in the political demography of Arab countries, with an emphasis on the Middle Eastern and Gulf States. She has been a research fellow and programme manager in the French Institute for the Near East (IFPO) in Amman, Jordan. She is currently involved in several European and international projects focusing on recent changes in family structures in the Arab world, highly-skilled and female migration, as well as GCC countries' demographic dynamics and policies. She has published over thirty-five book chapters, scientific articles and research papers, and an edited volume on Migration and Politics in the Middle East (2006). She is currently working on a book on Jordan and the refugee issue. Contact: f_dba@hotmail.com

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Short Reference: F. De Bel-Air, "Demography, Migration and Labour Market in Saudi Arabia 2018," Explanatory Note No. 5/2018, GLMM, <http://gulfmigration.org>

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