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Numbers Increasing, Dependency Decreasing: The GCC Changing Labor Immigration Emphasis

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Numbers Increasing, Dependency Decreasing: The GCC Changing Labor Immigration Emphasis

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Abstract

The outbreak of the Arab Spring events in late 2010 shook the entire Arab region, including the GCC countries. This was not only because of the collapse of Gaddafi's regime in Libya – a pure rentier state -- but also due to the fact that the riots reached Bahrain and Oman. The aim of this paper is to examine one of the most prominent aspects of the socioeconomic reaction of the GCC regimes to the Arab Spring – the employment and labor immigration policies. Thus, the first part of the paper examines the major components of the employment and labor immigration policies of the GCC countries following the Arab Spring, while the second part evaluates the degree of success of these policies. The main conclusion is that although the two "traditional" aims of the policies, namely, to reduce the number of foreign workers and increase the percentage of nationals employed in the private sector, were achieved only partially, other components of the policies, primarily maintaining the GCC political structures without implementing violent enforcement measures and supporting the rapid development of the non-oil sectors, were largely achieved. Overall, in total contrast to the other three oil-based Arab countries, namely Libya, Algeria, and Iraq, the GCC countries were characterized by political stability in line with solid economic growth, both highly connected to their employment and labor immigration policies.

Keywords

Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates, Gulf Cooperation Council, National & Foreign Labour, National Labour, Foreign Labour, Nationalisation Work Force, Saudisation, Employment, Unemployment, Female Employment, Sponsorship, Labour Market, Policies, Politics, Security.

1. Introduction: Oil and Employment Prior to the Arab Spring

Since oil is a depletable natural resource and its price fluctuates to a great extent, the development of alternative sources for income and employment has become the paramount aim of the GCC economies since the beginning of the "oil era." This was, and still is, the core of their macro-economic development plans. Thus, the primary aim of the Second Saudi Five-Year Development Plan (1975-1980) was "[to] diversify[ing] sources of national income and reduce[ing] dependence on oil."[1] Similarly, the initial aim of Oman's first Five-Year Development Plan (1976-1980) was "to achieve a positive rate of growth in non-oil sectors."[2] The long-term development plans of the other GCC countries were similarly concentrated on gradually decreasing the dependence on oil income without shaking the socio-cultural-political foundations. This policy, it should be emphasized, was in stark contrast to "the White Revolution" of then Shah of Iran, Mohammad Reza Pahlavi.

In order to achieve the paramount aim of rapid economic diversification, following the October 1973 "oil boom,"[3] the GCC's long-term macro-economic development plans concentrated on three major areas: (a) rapid expansion of infrastructure facilities; (b) enhancing public services, mainly healthcare, education, municipality, the legal systems, welfare and so forth; and (c) massive development of non-oil competitive industries and services.

However, the implementation of the development plans, which naturally intensified following the October 1973 oil boom, required an extensive workforce of a size and skill level that could not be supplied by local sources due to both the small size of the national workforces and their low levels of education and professional skills.[4]

In light of the local workforce shortage on the one hand and the unwillingness of the GCC regimes to overcome this barrier through massive naturalization of foreign labor in order to preserve their traditional socio-cultural-political structures on the other,[5] they decided that for the short-term, the necessary workforce would be supplied through massive temporary labor immigration. For the longer run, the required workforce, at least its majority, would be supplied locally through huge investments in education and professional training in parallel to the implementation of generous pro-natalist measures in order to maintain high fertility rates despite the low death rates.

As long as the national workforce was relatively small in comparison to the workforce demand, and as long as the rental revenues were sufficient to preserve the rentier system based on "no taxation" in the form of various financial gains to the nationals in return of "no [political] participation,"[6] the dual labor market continued -- the vast majority of the nationals were employed in the public sectors with high salaries and favorable work conditions, while the foreign workers worked, mainly, in the private sector with much lower salaries.

Hence, the labor force nationalization policies that were implemented since the early 1980s (following the end of the "oil decade") were effective only in the public sectors, where the governments, rather than market forces, controlled wages and employment conditions. In the case of Saudi Arabia for example, at the end of 2004, while Saudi nationals comprised 91.0% of the public sector employees, in the private sector they represented only 11.6% of the total workforce. In nominal numbers, about half of the Saudi workforce was employed in the public sector.[7] In the smaller GCC countries, the share of the nationals employed in the public sector of the total national workforce was much higher, amounting to as much as 91.3% in the case of Qatar in 2004.[8]

Two factors led to a steady rise in unemployment among national first-time job seekers during the 1990s and the early 2000s. The first was the rapid growth of the national workforces due to the high natural increase rates; and the second was significantly fewer new work opportunities in the public sectors due to economic stagnation. In the Saudi case, for example, in 1999, the unemployment rate in the 20-24 age group was 26.4%, while it was less than 1% in the age group of 30 and above.[9] A high unemployment rate among first-time job seekers was prevalent in the other GCC countries as well.[10] The combination of rapid population growth and a long period of low oil prices,[11] in parallel to a rapid increase in the amount of workers' remittances from the GCC countries,[12] led to an overall feeling that the current dual labor market could not continue in the long-run.

In mid-2002, however, oil prices started to recover and peaked at more than $140 per barrel in July 2008 – higher than ever before and since. This recovery enabled the GCC authorities to continue with their previous rentier pattern with minor changes only, despite the continuation of the rapid growth of the indigenous populations.

The outbreak of the Arab Spring events, however, shook not only the regimes of the non-oil Arab countries, but those of the GCC as well. This was not only because the riots spread like wildfire throughout almost the entire Arab region, but also because they reached Bahrain and Oman. While the riots in Bahrain could be attributed, at least partially, to the long-lived struggle of the Shiʿi majority against the Sunni Al Khalifah ruling family,[13] this was not the case of Oman, as "the Omani Spring" was solely based on socioeconomic grounds. Last, the collapse of Qaddafi's regime -- a pure rentier regime -- caused a great concern among the GCC authorities.

The aim of this paper is to examine one of the most prominent aspects of the socioeconomic reaction of the GCC regimes to the Arab Spring – the employment and labor immigration policies. Thus, the first part of the paper examines the major components of the employment and labor immigration policies of the GCC countries following the Arab Spring, while the second part evaluates the degree of success of these policies.

2. The GCC Employment and Labor Immigration Policies following the Arab Spring

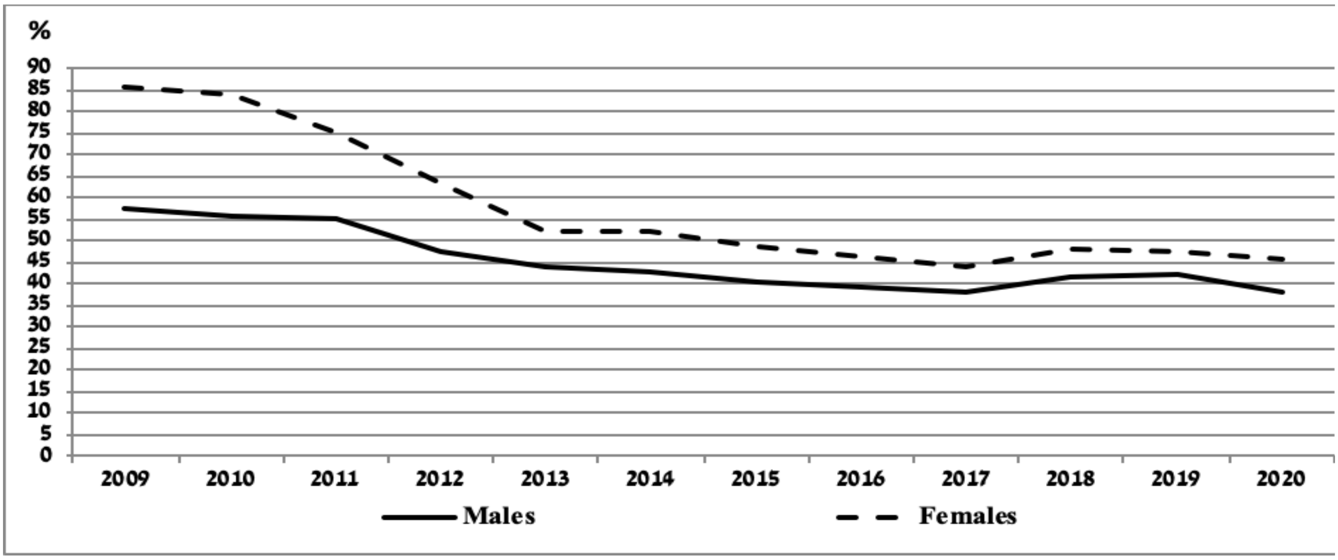
During the 2000s, due to the recovery of oil prices, the GCC economies largely recovered with an annual average GDP growth rate of about 8%.[14] However, unemployment among young national first-time job seekers remained in double-digit figures.[15] Thus, immediately following the onset of the Arab Spring, all of the GCC authorities, without exception, started to implement "an employment first aid policy." On 18 March 2011, the Saudi King 'Abdullah announced the immediate payment of two months' salary to all governmental employees as a compensation for the rise in living costs; a monthly payment of SR2,000 ($533) as an unemployment allowance; a minimum wage of SR3,000 ($800) for all the public sector national employees; and the addition of 60,000 positions in the Interior Ministry.[16] Indeed, during 2011-2013, the number of Saudi nationals employed by the public sector increased from 919,000 to 1.151 million – an increase of 25% within only two years. The increase of Saudi women national employees in the public sector was as much as 43% (Table 1). Overall, the Saudi "rentier-reaction" to the Arab Spring equated to a staggering $129 billion.[17]

Table 1. Distribution of the Saudi National Workforce between the Public and the Private Sectors, by Sex (2009-2020) (thousands)

Year	No. of nationals employed in the public sector			No. of nationals employed in the private sector			Total nationals employed			*% nationals employed in the public sector*	
	Males	Females	Total	Males	Females	Total	Males	Females	Total	Total	Females
2009	548	283	867	633	48	681	1,181	331	1,512	*57.3*	*85.5*
2010	590	295	885	669	56	725	1,259	351	1,610	*55.9*	*84.0*
2011	617	302	919	745	100	845	1,362	402	1,664	*55.2*	*75.1*
2012	643	370	1,013	919	216	1,134	1,562	586	2,148	*47.2*	*63.1*
2013	718	433	1,151	1,068	399	1,467	1,786	832	2,618	*44.0*	*52.0*
2014	718	451	1,169	1,137	413	1,550	1,855	864	2,719	*43.0*	*52.1*
2015	709	469	1,178	1,239	500	1,739	1,948	969	2,917	*40.4*	*48.4*
2016	704	474	1,178	1,262	548	1,810	1,966	1,022	2,988	*39.4*	*46.4*
2017	697	476	1,173	1,293	606	1,899	1,990	1,082	3,072	*38.2*	*44.0*
2018	727	497	1,224	1,160	541	1,701	1,887	1,038	2,925	*41.8*	*47.9*
2019	730	502	1,232	1,142	556	1,698	1,872	1,058	2,930	*42.0*	*47.4*
2020	726	502	1,228	1,148	599	1,747	1,874	1,101	2975	*37.9*	*45.9*

Sources: SAMA, *Annual Report, 2010-2019 (*Riyadh); SCB (Saudi Central Bank), *Annual Report-2020* (Riyadh).

Figure 1. Percentage of Saudi Nationals Employed in the Public Sector Out of the Total National Workforce, by Sex (2009-2020)



Sources: see Table 1.

The reaction of the Omani authorities to the "Omani Spring" was similar to that of Saudi Arabia, namely, adopting an expansionary fiscal policy in order "to cool down" the young nationals. Hence, the Omani government added 50,000 public sector jobs and raised the minimum wage for Omani national employees from $364 to $520 in both the public and the private sectors in line with the implementation of unemployment payments for nationals.[18] In early 2011, the Bahraini government announced the absorption of 20,000 Bahraini nationals in the Ministry of Interior -- an increase of 20% of Bahrain's total governmental employees.[19]

Following the delivery of the emergency employment first aid, the GCC authorities initiated new long-term employment and labor immigration policies. The two paramount aims of these policies were: (a) to increase the number of nationals employed in the private sector; and (b) to reduce the dependency on foreign labor in key positions. These plans were mainly based on the following eight components:

a. Increasing the incentives of private employers to employ a higher number of nationals. As rightly claimed by the IMF, since raising public sector salaries and generous unemployment allowances "provide[s] a disincentive for nationals to seek private sector employment,"[20] in September 2011 the Saudi authorities launched the new Saudization program -- the *Nitaqat* ("zones"). The plan classified the private sector companies according to each a percentage of Saudi national employees, identified by four bands (red, yellow, green, and premium). Private sector employers who did not conform to their quota were penalized, not only by paying a high fine, but also by denying the renewal of the work permits for their foreign workers. Those who complied to the quota, on the other hand, would benefit.[21]

The *Nitaqat* program, in contrast to previous Saudization programs, included all private sector employers, thus enabling the Saudi government not only to know for the first time the actual spread of Saudis in the private sector, but also to effectively operate against the employers who did not comply with their specific Saudization quota. Indeed, following the implementation of the program, the number of Saudi nationals employed by the private sector substantially increased. By 2015, their number, including self-employed, amounted to 1.739 million (among them 500,000 females), as compared to 725,000 in 2010 (among them only 56,000 females) – an increase of almost 140% in just five years (Table 1). In Oman as well, the number of nationals employed by the private sector substantially increased, from 174,441 in 2011 to 209,629 in 2015 -- an increase of 20.2%.[22] A similar phenomenon also occurred in Bahrain and Kuwait due to the implementation of a similar policy.[23]

b. Prohibition on foreigners to work in occupations that are suitable for nationals. While the previous labor force localization policies concentrated, first and foremost, on replacing foreign workers with nationals (with the sole exception of domestic services and construction), the new policies strove to place a higher number of nationals in private sector "white collar" jobs. In other words, the new policies were based on the realization that most private sector jobs offered low salaries and had low occupational status, making them unsuitable for nationals. Hence, the focus of the new plans turned from reducing the number of foreign workers into increasing the number of nationals employed by the private sector, regardless of the total number of the foreign workers. In the case of Kuwait, for example, in 2018 the Kuwaiti government decided to end hiring foreign workers under age 30 with college degrees.[24] The other GCC governments implemented a similar policy.

c. Subsidies on the salaries of nationals employed by the private sector. A prominent incentive for increasing the employment of nationals by private employers is subsidizing a substantial part of their salaries. The UAE policy not only encourages nationals to be employed in the private sector, but also to acquire higher education. In November 2022, the UAE government announced the expansion of allowances for nationals employed in the private sector. According to the new decision, the salary support allowance would reach up to a maximum of Dh7,000 ($1,892) a month for holders of bachelor's degrees, Dh6,000 ($1,622) for diploma holders and Dh5,000 ($1,351) for holders of high school certificates.[25] A major reason for this policy of subsidizing the employment of nationals in the private sector rather than simply employing them in the public sector is the desire of the GCC governments to avoid bureaucratic clumsiness, as is the situation in all of the non-oil Arab countries, particularly in Egypt.

d. Expelling foreign workers in irregular situations. Since the 1990s, but more intensively following the outbreak of the Arab Spring, all GCC countries have implemented routine campaigns of expelling illegal foreign workers. These operations aim not only to control foreign residents, but also to prevent them from avoiding the required residency and employment fees. Thus, for example, in 2013 the Saudi government granted an amnesty period for foreigners to rectify their sponsorship status or leave the Kingdom.[26] According to official Saudi data, in 2012, prior to the implementation of the new regulations, there were approximately 5 million illegal migrants in the Kingdom, many of them Muslims pilgrims who did not leave the Kingdom after the expiration of their Haj or Umrah visas. This also applied to persons who entered the Kingdom illegally through its huge unsecured borders, especially with Yemen.[27] In 2022 alone, Kuwait deported 30,000 foreigners in irregular situations.[28] Similar campaigns were implemented on a routine basis in all other GCC countries.

e. Decreasing the number of non-economically active foreigners. Since the 1980s, following the end of the first stage of the development of public services and the success of replacing many of the non-national Arab employees by nationals in the public sector, mainly in the bureaucracy, education, municipality services and so on, the GCC authorities no longer needed a huge number of highly skilled non-national Arabs. Hence, as the equilibrium moved from overdemand to oversupply, the GCC authorities could impose limitations on the accompanied family members of the foreign workers, the most prominent being the requirement to buy health insurance for each of them. Beyond the economic gain from not providing subsidized public services, energy products and foodstuff to the non-national residents, keeping the vast majority of the foreign labor without their families intended to encourage them to return to their home countries immediately following the end of their contract.

f. Changing the *kafala* (sponsorship) system. Originally, the *kafala* system – the legal basis for residency and employment of non-nationals in the GCC countries – was meant to control the inflow and outflow of each foreigner in these countries. Hence, any migrant worker was legally allowed to work only for a specific *kafil* who received a labor visa from the authorities. Following the October 1973 oil boom that led to a substantial rise in the attractiveness of the GCC labor markets, the *kafala* system turned into a major source of income for nationals through wide-range trading in labor visas, as the visa was given to the employer rather to the employee. Moreover, since there were no legal limits on the overall number of labor visas, the *kafala* system led to the rapid spread of the phenomenon of "ghost companies," namely, the establishment of firms only for the acquisition of visas for foreign workers.[29] In recent years, however, the GCC countries started to reform the *kafala* system. For example, in 2020, the Qatari authorities allowed migrant workers to change jobs without the permission of the previous employer. Later, reforms which were quite similar were adopted by the other GCC countries as well.[30]

In parallel to changing in the *kafala* system, the GCC authorities steadily increased the amount of fees on each foreigner. In January 2018, the Saudi authorities doubled the fee on the foreign workers in the private sector, from SR200 ($54) a month to SR400 ($108). This amount increased further to SR600 in 2019 and SR800 in 2020. The fee for a dependent was set at SR400 per month.[31] The law did not specify whether the worker or the employer should pay these fees and left it to the individual contract terms. In practice, these fees are taxes on the foreign workers.

g. Increasing women's economic activity rate. The aim of increasing women's employment is two-fold: first, to increase the family income from wages rather than from governmental allowances and subsidies; and second, the higher the women labor force participation rate, the lower the fertility rate.

During the past decade, a high fertility rate has begun to be perceived by the GCC authorities as a burden rather than an asset as it was previously.[32] Thus, achieving a "demographic dividend" age structure[33] has become a target, although not officially. The Saudi Vison 2030 plan specifically noted that: "Our economy will provide opportunities for everyone -- men and women […] -- so they may contribute to the best of their abilities."[34] In order to boost women's employment, the Saudi authorities lifted many substantial barriers to it, the most prominent being the abolishment of the prohibition on women driving (2018) and allowing gender mixing in workplaces (2017). The Bahraini government also acted in a similar manner. In January 2013, the government adopted the National Development Plan for the Advancement of Bahraini Women, 2012-2022, aimed at enhancing the employment of women, particularly in the private sector.[35]

h. Preference for non-Arab foreign workers. Although this policy was, and still is, obviously under the surface, in practice it has been implemented in each of the GCC countries since the early 1980s. The reason for this policy was political as well as economic. From a political viewpoint, Asian workers were considered to be "passive observers,"[36] as they did not take any part in political life. Economically, the cost of hiring Asian workers was, and still is, much lower than Arabs of the same skill set and education level.[37] This policy of preferring non-Arab workers intensified considerably following the outbreak of the Arab Spring despite the fact the unemployment had become the most prominent socioeconomic and political problem of the non-oil Arab countries.

3. Evaluating the GCC Employment and Labor Immigration Policies Following the Onset of the Arab Spring

The common attitude in academic literature regarding the degree of success of the GCC employment and labor immigration policies is concentrated mainly on two main parameters: (a) The percentage of foreign workers in the total labor force; and (b) the share of nationals among private sector employees. These two aims were, and still are, the main official targets of the employment and labor immigration policies of each of the GCC countries since the 1970s. However, as the employment and labor immigration policies are part of the long-term macroeconomic policies,[38] the measurement of their success should be in line with the paramount aims of these plans, namely, reducing the dependence on oil and gas rental revenues; decreasing the dependence on foreign labor; and increasing the economic activity rate of the nationals. Hence, in the following section, the measurement of the success of the GCC employment and labor immigration policies will be examined in line with the above-mentioned three aims of the long-term macroeconomic policies:

a. The percentage of foreign labor in key positions (i.e., physicians, high-ranking managers, engineers, architects, senior academic staff and so forth)**.** As the equilibrium at the top of the labor market naturally tends towards the demand side, increasing the number of nationals employed in these occupations would naturally reduce the dependence on skilled foreign labor, regardless of the total number of the foreign workers in the country. This is because the supply of low skilled, low paid workers is practically endless; they can be replaced rapidly. The most prominent indicator for measuring the dependence on highly skilled foreign labor is their nominal number in the public sectors. As the data reveal, their numbers indeed steadily decreased. In the case of Saudi Arabia, while in 1997 the number of foreign workers in the public sector was 95,978 (14.6% of the total workforce),[39] their number declined to 49,599 (3.9% of the total workforce) in 2020 despite the rapid growth of the public sector as a result of the extensive growth of both the population and the economy.[40] In Qatar, in 2020, 61% of the national workforce was highly skilled and held "senior, professional and technical positions,"[41] as compared to 54% in 2006.[42] A similar pattern of improvement of the qualifications of the national workforce occurred in the

UAE where nationals are currently employed in a wide range of economic activities, although due to the scale of the economy they represent only a tiny percentage of the total workforce.[43] Hence, large numbers of foreign workers represent a success rather than a failure.

The second tool to reduce the dependence on professional foreign workers is that in recent years, the GCC authorities, under certain criteria, are enabling, and sometimes even encouraging, the naturalization of highly skilled foreigners. In early 2021, the UAE announced that Emirati nationality would now be attainable for investors, doctors, specialists, scientists, intellectuals, and artists.[44] Although UAE is a "harbinger" in this respect, due to the global competition on highly skilled workforce, it seems that all of the other GCC countries will have no choice but to offer citizenship, or at least permanent residency, for top-skilled employees in certain occupations. Thus, while in the Western labor-importing countries citizenship or permanent residency depends mainly on the length of living in the country, in the GCC countries citizenship or permanent residency will be available only sparingly in order to keep the traditional forms of the GCC societies regardless the length of living the country or having been born in that country.

b. The unemployment rate among the nationals. A high unemployment rate among the nationals, primarily among educated first-time job seekers, represents not only a severe economic inefficiency, but as was proven in the Arab Spring events, a crucial political problem. With respect to lowering the unemployment rate among young nationals, the degree of success of the GCC countries is varied, at least thus far. In the Saudi case, despite the *Nitaqat* program and many other financial incentives aiming to enhance the employment of nationals in the private sector, the unemployment rate remained quite high, although it has somewhat declined in recent years. In 2019, the last year prior to the onset of the Coronavirus pandemic, the unemployment rate among Saudi males was 6.6% and declined to 4.8% in the fourth quarter of 2022. Among Saudi females, the decline was from as high as 31.7% to 15.4% during the corresponding period.[45] In Kuwait, although the unemployment rate declined from 7.2% in June 2021 to 5.4% in December 2022, this rate is still considered high.[46]

The unemployment problem among GCC nationals is concentrated almost solely among young first-time job seekers. According to Fitch data, the unemployment rate among young Kuwaitis not only did not decline during the past decade, but it even increased, amounting to 17% at the end of 2021.[47] In Qatar and the UAE on the other hand, the situation largely improved during the 2010s and the unemployment rate among nationals was very low in comparison to two decades earlier. In the case of Qatar, in the second quarter of 2022, the total number of unemployed nationals amounted to 594 (419 women), representing less than 1% of the national workforce.[48]

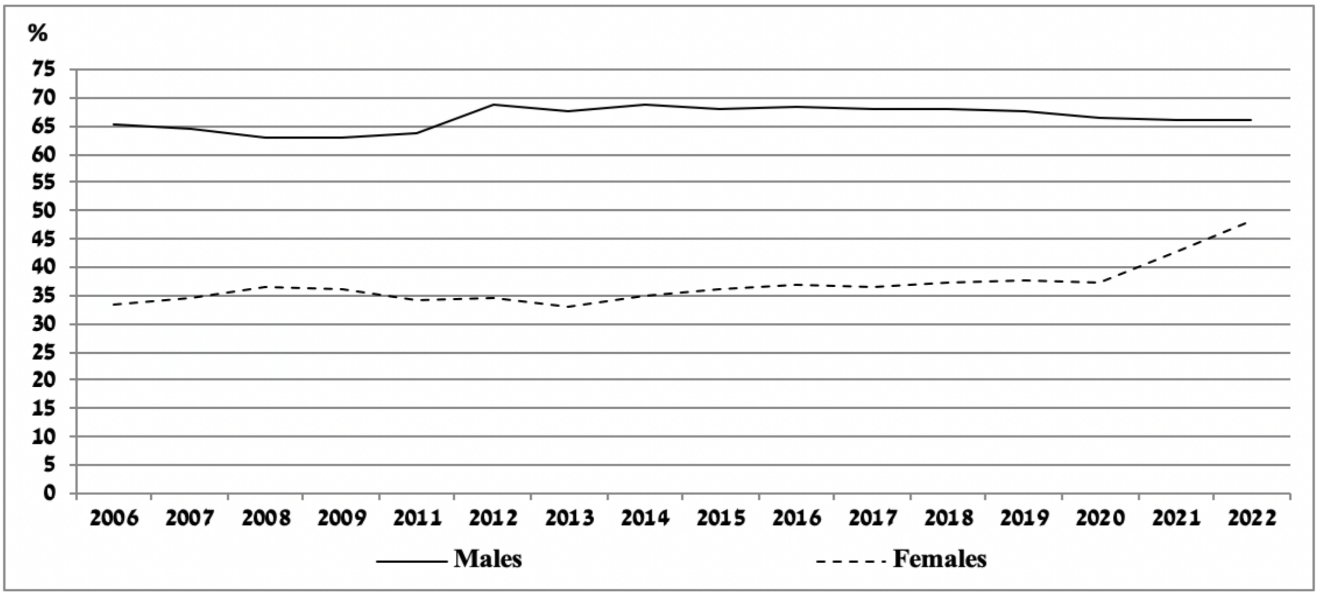
c. The national labor force participation rates. Indeed, in each of the GCC countries during the 2010s, the labor force participation rate of the national women substantially increased. In the Saudi case, the number of national women employed, in both the public and the private sectors, increased by as much as 214% during the 2010-2020 decade (Table 1). In Qatar, the economic activity rate of the national population increased from 48.7% in 2011 (63.6% among males and 34.0% among females) to 54.2% in 2022 (65.9% among males and 38.2% among females) (Table 2).

Table 2. Qatar: Numbers of Active Nationals (in thousands) and Economic Activity Rates, by Sex (2006-2022)

Year	Males			Females			Total		
	Population aged 15+	Economically active	*% economically active*	Population aged 15+	Economically active	*% economically active*	15+ population	Economically active	*% economically active*
2006	60.8	39.6	*65.1*	62.0	20.8	*33.5*	122.8	60.4	*49.2*
2007	63.4	41.0	*64.7*	65.2	22.6	*34.7*	128.6	63.6	*49.5*
2008	69.0	43.5	*63.0*	70.9	25.8	*36.4*	139.9	69.3	*49.5*
2009	73.2	46.0	*62.8*	73.1	26.3	*36.0*	146.3	72.3	*49.4*
2011	78.8	50.1	*63.6*	80.2	27.3	*34.0*	159.0	77.4	*48.7*
2012	82.8	56.4	*68.6*	83.2	28.8	*34.6*	165.4	86.2	*52.1*
2013	84.2	56.9	*67.6*	86.7	28.8	*33.2*	170.9	85.8	*50.2*
2014	90.7	62.5	*68.9*	90.9	31.8	*35.0*	181.6	94.3	*51.9*
2015	94.8	64.4	*67.9*	96.6	34.8	*36.0*	191.4	99.2	*51.8*
2016	94.9	64.9	*68.4*	99.6	36.7	*36.8*	194.4	101.6	*52.3*
2017	98.2	67.0	*68.2*	101.7	37.3	*36.7*	199.9	104.3	*52.2*
2018	99.4	67.7	*68.1*	103.8	38.6	*37.2*	203.2	106.3	*52.3*
2019	100.7	68.3	*67.8*	104.8	39.4	*37.6*	205.5	107.7	*52.4*
2020	105.7	70.2	*66.4*	109.2	40.6	*37.2*	214.9	110.8	*51.6*
2021	107.0	70.8	*66.2*	111.8	47.7	*42.7*	218.8	118.5	*54.2*

Sources: Qatar, Planning and Statistics Authority, *Labor Force Survey*, various issues, 2006-2022 (Doha).

Figure 2. Qatar: Nationals' Economic Activity Rates, by Sex (2006-2022)



Sources: see Table 2.

d. The nominal number of nationals employed by the private sectors. The measurement in this category should not be the percentage of the nationals among private sector employees, but rather the nominal number of nationals employed in the private sector and their percentage of the total national workforce. In light of the current rapid development of the tourism industry, the scale of commerce and retail and many other non-oil sectors, no one expects the number of foreign workers in the private sectors to decrease. The true aim is that through the development of the non-oil industries and services, the number of real work opportunities for nationals in the private sector would increase at least in the face of the increase in the national workforce.

In this case, the most impressive change has occurred among Saudi women. The nominal number of Saudi women employed by the private sector increased from a mere 48,000 in 2009 to 599,000 in 2020. Among Saudi males, the increase was also substantial, from 633,000 in 2009 to 1.14 million in 2014, mainly a result of the implementation of the *Nitaqat* program and the huge governmental subsidies of the national salaries employed by the private sector. However, a major negative side effect of the *Nitaqat* program was the flourishing of the "ghost workers" phenomenon due to the need of the private employers to meet the required quota.[49] Since the mid-2010s, however, the increase in the number of nationals employed by the private sector moderated to less than 13% during the 2015-2020 period, namely less than 2.5% on annual average (Table 1).

e. The economic activity rate of the non-nationals. Both politically and economically, the GCC countries have no positive incentives for allowing residency for the accompanying family members of the foreign workers. Indeed, since the mid-1980s, after replacing the vast majority of the Arab workers in the public sector, the GCC authorities started to impose restrictions on residency of the accompanying family members of the foreign workers. These restrictions, in line with abolishment of their right to free services previously enjoyed, led to a sharp decline in their numbers. In the Saudi case, while in 1975 the percentage of workers among all non-nationals was less than 50%, this rate increased to 77% in 1990 (Table 3). A similar process occurred in the other GCC countries.

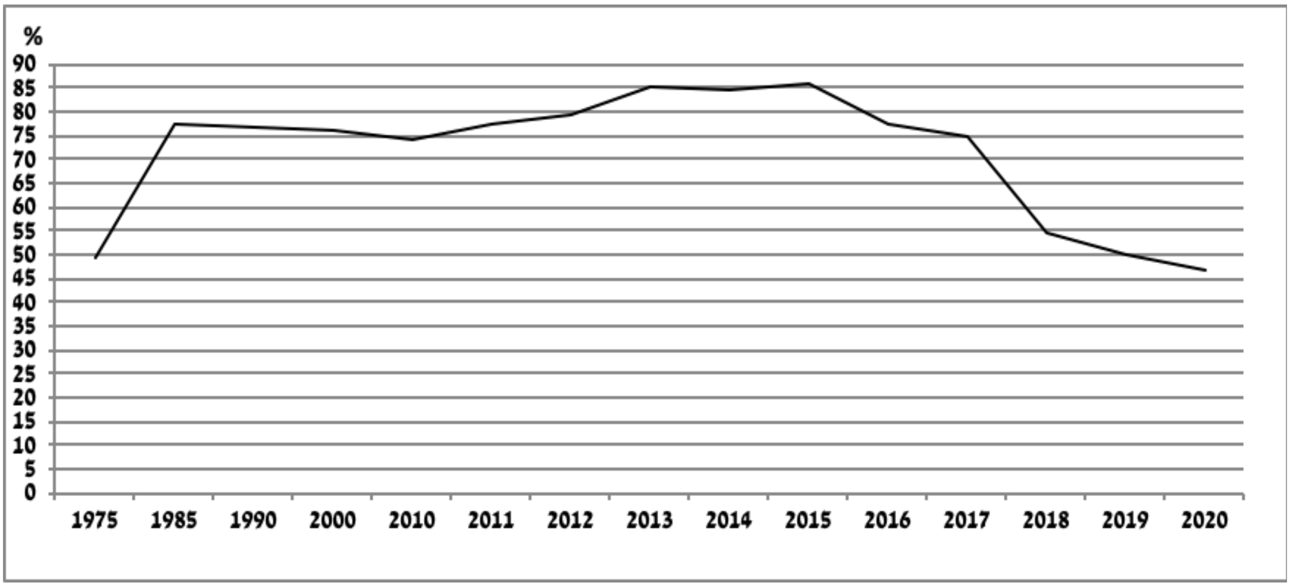
Table 3. Saudi Arabia: Numbers (in thousands) and Activity Rates of Expatriates in Saudi Arabia (1975-2020)

Year	No. of foreign workers (thousands)	Total expatriates (thousands)	*% economically active*
1975	773	1,565	*49.4*
1985	3,522	4,563	*77.2*
1990	3,405	4,437	*76.7*
2000	4,003 (a)	5,258	*76.1*
2010	6,267	8,429	*74.4*
2011	6,937	8,971	*77.3*
2012	7,429	9,357	*79.4*
2013	8,287	9,723	*85.2*
2014	8,544	10,068	*84.9*
2015	8,907	10,391	*85.7*
2016	9,023	11,706	*77.1*
2017	9,102	12,185	*74.7*
2018	6,945	12,645	*54.9*
2019	6,583	13,115	*50.2*
2020	6,330	13,583	*46.6*

(a) data for 1999.

Sources: ILO, *International Migration and Development in the Arab Region*, by J.S. Birks and C.A. Sinclair, (Geneva, 1980); HRD base Ltd., Lloyds Bank Chambers, *Socio-Demographic Profiles of Key Arab Countries* (Newcastle, May 1987); Birks, Sinclair & Associates Ltd., GCC Market Report, 1990 and 1992 (Durham: Mountjoy Research Centre 1990; 1992); Andrzej Kapiszewski, *National and Expatriates: Population and Labour Dilemmas of the Gulf Cooperation Council States* (Reading: Ithaca Press, 2001); SAMA, *Annual Report*, 2010-2020 (Riyadh); SCB, 57th Annual Report-2021 (Riyadh, 2021).

Figure 3. Saudi Arabia: Share of Economically Active in the Total Foreign Population (1975-2020)



Sources: see Table 3.

Following the Arab Spring, this process intensified even further. In the early 2010s, the percentage of the accompanying family members in the total foreign population in Saudi Arabia declined to less than 20% (Table 3). In the case of Qatar, in the third quarter of 2021, the percentage of the economically inactive in the total foreign population was a mere 10%[50] as compared to 56% in 1990.[51] However, since the Saudi authorities started to impose fees on foreign workers and their family members, many of them started to work unofficially in order to avoid the payment of fees. Thus, while the size of foreign population in 2018 was almost half a million higher than in 2017, the number of foreign workers that were employed officially declined from 9.1 million in 2017 to 6.9 million in 2018 and continued to decline to only 6.3 million in 2020, while the number of non-Saudis increased to 13.6 million (Table 3). If the numbers of undocumented foreign workers remain large, one should expect a campaign of the Saudi authorities to curb this phenomenon.

f. The effectiveness of coping with international human rights criticisms. Since the 1990s, but more intensively in the past two decades, during which awareness of the exploitation of foreign workers increased, the international human rights organizations criticized the GCC authorities on three main issues: non-payment of full salaries; much longer working hours than allowed; and exploitation and sometimes even abuse of workers, mainly women employed as domestic workers.[52] The GCC authorities have addressed these criticisms using three main tools. The first was the implementation of changes in the *kafala* system itself and in the set of rules and regulations in order to curb these exploitations. The second tool was intensifying inspection of the private sector employers on the issue of payment of salaries to foreign workers. Thus, for example, in 2009, the UAE introduced the UAEWPS (UAE Wage Protection System) -- an electronic salary transfer system that allows private employers to pay the salaries of their employees through banks and exchange bureaus. Similar systems aimed at addressing the issue of non-payment of salaries to foreign workers exist in all of the GCC countries. The third tool was wide-range donations to various refugee and human rights organizations.[53] In retrospect, indeed, in recent years the extent of these criticisms has significantly diminished.

g. Maintaining the political structure. Overall, despite the unprecedented socioeconomic changes that occurred in each of the GCC countries following the beginning of the oil era more than seven decades ago, their traditional political structure did not change, even in Qatar and the UAE where non-Arabs constitute the vast majority of the population. Naturally, maintaining political stability is the most prominent aim of the GCC royal families. In this respect, the GCC regimes continue to be unique worldwide. This is because although they are not democratic regimes, they still manage to function almost without any real internal opposition, neither from nationals nor from the foreign population. Bahrain is an exception in this respect; but its exclusion, as previously mentioned, is due to the prolonged rivalry between the Sunni regime and the Shiʻis that represent the majority of Bahrain's citizen population.

h. Increasing the competitiveness of non-oil sectors. In retrospect, the employment and labor immigration policies served the competitiveness of the GCC non-oil sectors well. In each of these countries, the private investments of both locals and foreigners increased steadily. According to the World Bank's "Doing Business" index, in 2020, UAE was ranked 16,[54] Qatar was ranked 77, while Egypt was ranked only 114.[55] Overall, in 2021, the FDI (Foreign Direct Investments) in the GCC countries totalled $44 billion. The UAE attracted the highest amount with $20.6 billion, while Saudi Arabia drew $19.8 billion. The rest was invested in the other four GCC countries.[56]

i. Increasing non-rentier revenues. Reviewing the composition of the GCC governmental revenues reveals a steady increase in the non-oil and gas revenues. In the case of Qatar, these revenues increased by as much as 49% during 2016-2019.[57] Saudi Arabia's non-oil revenues increased from $22.6 billion in 2011[58] to $45.8 billion in 2015,[59] and reached $89.8 billion in 2019.[60]

j. Maintaining high security with relatively low expense. The connection between crime rate, gender imbalance and the share of foreign workers is covered extensively in the academic literature.[61] In contrast to other large-scale labor immigration countries, the GCC countries rank very low in the World Crime Rate,[62] despite the fact that the vast majority of the expatriates are males in working age groups (20-54 years). The crime rate of Saudi Arabia is 25.23 (rank 121). Oman ranked 132 with a crime rate of 20.34, the UAE, with a crime rate of 15.23, ranked 135 and Qatar, with a crime rate of 12.12, ranked 136, the lowest worldwide.[63] According to a City Crime Index, of the 416 major cities worldwide, the two cities with the lowest crime rate worldwide are Doha and Abu Dhabi.[64] This high level of personal safety, which is crucial not only for the quality of life, but also for the prosperity of the economy, particularly the tourism industry, is achieved without huge expenditures on internal security. In this respect, the GCC countries are indeed unique.

4. Summary, Conclusions and Looking Ahead

In retrospect, since the beginning of the oil era, the foreign workers, primarily the non-Arabs, have viewed the GCC countries the way an employee views its successful employer. They did not see themselves as "shareholders" of the GCC wealth. Thus, the vast majority of workers, from the onset, did not intend to settle permanently in the GCC countries. This is not only because of the high cost of living in the GCC countries as compared to their home countries, but also because the vast majority of these workers come to the Gulf alone, without their families. As such, neither the nominal number of foreign workers nor their percentage in the workforce or in the total population constitutes "a security danger," just as a large and successful company's management does not fear its extensive workforce.

As such, foreign workers in the GCC countries are not entitled, under any circumstances, to citizenship by virtue of their length of living in these countries, in the same way that an employee is not entitled to shares in the company merely for having worked in the company many years. Naturally, the management of any company will grant shares only to those employees who have the potential to make a unique contribution to the company. This perception explains the new citizenship laws of the GCC countries that are willing to grant citizenship or permanent residency to highly skilled workers, regardless of how long they have been working in the country.

In line with the current socioeconomic and political trends on the one hand and the governmental macro-economic policies on the other, it seems that the following characteristics will continue to prevail in the GCC labor markets for the foreseeable future:

a. The number of foreign workers in the private sectors will continue to steadily increase. The rate of the increase depends, of course, on the pace of the economic performance and the success of the economic diversification policy. Due to the rapid development of the tourism industry, the vast majority of them will continue to be low-skilled, low-paid employees.

b. The national workforces, both men and women, will continue to be concentrated in the public sectors as long as the vast majority of the work opportunities in the private sector will continue to be in low-skilled, low paid occupations.

c. The labor force participation rate of national women will continue to increase in line with the improving of their educational and vocational training level.

d. The percentage of Arabs among the foreign workers will not increase, despite the previous GCC policies regarding the nationality composition of their foreign labor. In the case of Bahrain for example, according to the 2020 census, the non-GCC Arabs constituted a mere 10% of the total foreign population.[65] In Saudi Arabia, in 2022 the non-national Arabs constituted 32.5%(4.35 million) of the total non-Saudi population.[66] Hence, while in the 1970s and even the 1980s, Arabs constituted the majority of the foreign workers in the GCC countries, in the mid-1990s their percentage declined to about 30%.[67] Since then, the trend towards replacing Arabs by non-Arabs continued. Currently, in none of the GCC countries do non-national Arab citizens represent the majority of the foreign workforce.

e. The percentage of the accompanying family members will continue to be low as a result of two factors: The first is the steady increase of the amount of the fees for family members and their limitation to free or highly subsidized public services; and second, the composition of foreign labor. As long as the vast majority of the foreign workers continue to be low paid, these workers will not be able to bring their families to the Gulf.

f. The separation between the nationals and the foreign populations will not only continue to prevail, but probably even intensify in light of the steady increase in their numbers and the natural aspiration of the royal families and the nationals themselves not to share in their "wealth stocks" with others.

Hence, in the near future at least, the dual labor market will continue to be the most prominent characteristic of the GCC economies.

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