



حوار أبوظبي بين الدول الآسيوية المرسلية و المستقبلية للعمالة  
Abu Dhabi Dialogue among the Asian Labor-Sending and Receiving Countries

# ABU DHABI DIALOGUE

| SENIOR OFFICIALS' MEETING |

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ANTICIPATED CHANGES IN THE EMPLOYMENT LANDSCAPE IN THE GCC AND  
THEIR IMPACT ON LABOUR SUPPLY AND DEMAND IN ADD CORRIDORS

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## THE SHIFTING EMPLOYMENT LANDSCAPE AND INTERNATIONAL MIGRATION IN ADD CORRIDORS:

### WHAT SKILLS FOR THE FUTURE?

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# EXECUTIVE SUMMARY

Abu Dhabi Dialogue (ADD) member states are increasingly facing a technologically changing employment landscape. Migrant destination countries are diversifying their economies and moving toward capital- and technology-intensive industries. Such change is navigated by policy and strategy at the highest levels and has accelerated since the beginning of the Covid-19 pandemic. National development strategies have propelled this transition, and generally aim at leveraging automation and digitalisation, while diversifying into several high-growth sectors. The changes in the nature of the economy and the labour market will directly affect the future demand for skills in these countries. Skills in demand are slated to be more technologically relevant, built on STEM (Science, Technology, Engineering and Math) fields, and steeped in a diverse set of soft-skills that complement automated and technologically driven jobs – skills that are currently less desired by prospective students or hard to define. As the ADD area is deeply built on labour migration, the impending changes will affect migrants, their countries of origin and the recruitment systems they are attached to. While countries of origin are increasingly more educated, the share of highly educated labour force remains relatively low. Individuals with tech-related skills are in short supply and the prospects of migration may translate into shortages in their own countries for such skills. Both sending and receiving countries must adapt their education, labour market and migration recruitment systems to adapt to both domestic and foreign demand in skills, to seize the opportunities that the wave of new technologies will bring. Education systems in both countries of origin and destination must continue efforts to transmit needed skills to future cohorts, while creating greater incentives for students to enrol in STEM fields, and vocational training programmes. Education culture must also foster life-long learning and better educate on, identify and evaluate impactful soft skills. Countries must also adapt recruitment programmes that aim at filling labour needs in both origin and destination. To do this, education and employment sectors must work closer together. The ADD will therefore play a crucial role in creating dialogue and partnerships, particularly around the issues of credential certification, migration partnerships based on skills development.

Abu Dhabi Dialogue (ADD) member states are increasingly facing a technologically changing employment landscape. Countries of destination (CoD) in particular, namely the Gulf Cooperation Council (GCC) states of Bahrain, Kuwait, Oman, Qatar, the Kingdom of Saudi Arabia (KSA) and the United Arab Emirates (UAE), as well as Malaysia, are diversifying their economies and moving toward capital- and technology-intensive industries.

Considering the sizeable migration flows between ADD member countries, such a shift has direct consequences on employment prospects and implications for both countries of origin (CoOs) and of destination (CoDs). Migrants contribute to a high degree to the development of CoDs through their labour. Migrant workers are also important development agents for CoOs as they remit money back home and return with new social, financial and human capital. The future of migration flows and their contributions to ADD economies will depend on the adaptability of member states to the transforming employment outlook and demand in skills. But what kind of transformation will they face and which skills will be in demand? This paper explores the ways the future of work will affect the types and demand of skills in the ADD corridors. It presents an analysis of the current and future employment contexts in both CoOs and CoDs, places the analysis within the context of migration in the region and identifies the skills needed in relation to it.

### **What is the current employment context in the GCC countries?**

GCC economies are structurally similar and rely heavily on the growth of the hydrocarbon sector. While the oil and gas sector has been and remains the biggest contributor to GDP in the region, its share has fallen significantly over the last 20 years. At the turn of the 2000s, mining and quarrying accounted for 37 % of GDP in GCC countries and 41 % in 2010. Only Bahrain and the UAE were less dependent on resources with less than 30 % of their GDP linked to mining and quarrying. In 2019, this share had fallen to 29 per cent, while all the other contributing sectors of the economy had grown (GCC Stat, 2019). The largest sectors outside of energy are finance and real estate; manufacturing (chemicals and metal industries); public administration and defence; wholesale, retail trade and hospitality; and construction.

The oil industry does not drive employment in the GCC countries, however. In fact, the share of employment in GCC economies does not follow the corresponding sectoral contributions to GDP. The biggest sector of employment in GCC countries is the construction industry rather than oil and gas, followed closely by wholesale and retail trade and public administration. In Bahrain, the UAE and Saudi Arabia, the manufacturing sector also plays an important role and employs a comparatively larger share of people than in Kuwait, Oman and Qatar. The UAE's real estate and business sector stands out, as it employs twice as many people as in other GCC countries (ILO Stat, 2020a).

Economic diversification into non-oil sectors has become a high priority since 2014, however, following the collapse of oil prices (Fattouh and Sen, 2021), and the current Covid-19 pandemic provides the impetus to further push this transition. In fact, strategic national development plans have been adopted across all six GCC countries in recent years, ensuring that the transition away from oil dependence is navigated from the top, with adequate resources, and with the objective of modernising and further developing the private sector, specifically fostering future growth sectors. Generally, the

strategies aim at diversifying the economies into advanced, value-adding industries and creating knowledge-based economies. This implies a transition away from low-cost and labour-intensive industries to capital-intensive industries requiring high-skilled labour (Shayah and Sun, 2019).

In addition to shifting towards higher value sectors, national plans prioritise economic diversification, with infrastructure, renewable energy, manufacturing, tourism, retail and finance targeted as strategic sectors. Oman, for example, aims to increase the non-oil share of its GDP from 61 % in 2017 to 92 % in 2040 (Vision 2040, Government of Oman, 2018).

### **What future changes are expected in the GCC labour market?**

Changes in the sectors of employment in GCC countries are underway. Investment in infrastructure, especially those related to digital and data technologies, is highlighted in development plans as vital to keep the pace with the changing economic landscape. The renewable energy sector is expected to grow and create more jobs in GCC countries, an effort led by the UAE, which accounts for 70 % of the GCC area's renewable energy capacity, followed by Saudi Arabia (17 per cent) and Kuwait (1 per cent) (World Bank Group, 2019). The manufacturing sector, deeply disrupted by automation and digitalisation, is another sector of growth in GCC countries, where a 'fourth industrial revolution'<sup>1</sup> is in progress. New technologies and methods, such as decentralised manufacturing, the Internet of things (IoT), robotics, remote monitoring and localised distribution, offer reduced costs and efficiency gains. Tourism is also a sector to which GCC countries are turning to diversify their economy and seize the opportunities provided by their cultural heritage. The financial sector across the region has embraced new technologies, and namely Fintech - innovative technologies and platforms that either compete with or augment traditional financial services. These expanding sectors require more labour as they develop, but with a different skill set than previously dominant industries.

Digitalisation underpins the economic transformation of the region in all sectors and GCC countries are positioning themselves relatively well in terms of readiness for the future. According to the 2020 Network Readiness Index (NRI), a model based on four pillars (Technology, People, Governance, and Impact) seeking to evaluate the ability of countries to exploit the opportunities offered by information and communications technology (ICT), the UAE places in the top quartile, ranking 30th among 134 countries. This position is mostly related to the fact that the UAE ranks first in terms of "ICT usage among its population" (people pillar) and third in terms of "government promotion of investment in emerging technologies". The UAE is followed in the ranking by Qatar (38th), Saudi Arabia (41st), Bahrain (42nd), Oman (44th) and Kuwait (53rd) (Portulans Institute, 2020).

The automation agenda, accelerated by the current Covid-19 pandemic, is being fuelled by the availability of new technologies and the desire to be less reliant on an external labour force. The potential of scaling up automation is high in GCC countries, especially in sectors where low-to-semi skilled and cheap migrant labour is employed

<sup>1</sup>Key trends include automation, artificial intelligence (AI), big data analytics, blockchain technology, the Internet of Things (IoT) and 3D printing (OECD, 2018).

<sup>2</sup>France, Germany, Italy, Spain, and the United Kingdom.

to perform routine tasks that could be accomplished by machines. The share of work activities that could be automated given current technologies was estimated to be 45 % for GCC countries in 2018, a level similar to that in the United States (46 per cent) and the “Big 5” European countries<sup>2</sup> (47 per cent) (Aus dem Moore et al., 2018). Manufacturing as well as transport and warehousing are the two sectors where jobs have the greatest automation potential in GCC countries (58 % on average). Other important sectors in GCC labour markets, such as retail and wholesale trade, and construction also have on average more than 50 % of automatable activities. Thus, automation will mainly affect low-to-semi skilled jobs typically involving routine manual or cognitive tasks as well as employees with less working experiences, resulting in a skill bias in favour of high-skilled workers (Aus dem Moore et al., 2018).

The economic and health impacts of the Covid-19 pandemic could have mixed effects on the automation process in different sectors however. Considering the various lockdown measures and rapid transition to teleworking as well as the dire impacts on business and public finances, the push for technological innovation could precipitate the transition in various industrial sectors. According to the World Economic Forum’s Future of Jobs Report 2020, 50 % of business leaders surveyed globally stated that they had accelerated the automation of tasks in their companies because of the pandemic’s impact (WEF, 2020). Simultaneously, the dismissal of workers in many countries and industries as well as the rising global unemployment rate will increase the supply of workers willing to accept low salaries and conditions, which could slow down the automation process.

TVET enrolment in GCC countries is low, reflecting the general attitude toward this type of education despite GCC governments’ investments as part of their economic vision plans (Khan et al., 2017). Enrolment in vocational programmes at the upper secondary level is less than 2 % in Oman, Saudi Arabia and Qatar, 2.5% in the UAE and 4% in Kuwait. Bahrain has however higher enrolment than other GCC states with 14% of upper secondary level students pursuing vocational education in 2018. TVET options remain mostly limited to male students, which explain the low share of female students in these programs (UNESCO-UNEVOC, 2018).

The labour force participation of women has also increased sharply since 2000 and represent an opportunity for GCC countries. With female labour participation rates varying from 45 % to 57 % in 2020, Qatar, the UAE, Kuwait and Bahrain have significantly higher participation than Oman (36 per cent) and Saudi Arabia (22 per cent) (ILO Stat, 2019). Nonetheless, half of Saudi Arabian university graduates are women, an asset that is strongly considered in Saudi Arabia’s development strategy, which aims to increase women’s participation into the workforce to 30 % by 2030 (Vision 2030, Government of Saudi Arabia, 2016). Measures to improve the employability of women could help leverage the region’s human capital and fill labour gaps, specifically those useful adapted to new technologies (World Bank Group, 2019).

### What is the current state of labour migration in the ADD area?

To sustain economic growth and fill labour gaps in all sectors of the economy, GCC countries strongly rely on migrant workers, a large share of them originating from Southeast and Southern Asia. The foreign-born population totalled nearly 31 million and represented 53 % of the overall GCC population in 2020, with the highest shares found in the UAE (88 per cent), Qatar (77 per cent) and Kuwait (73 per cent) (Table 1).

**Table 1. Number of migrants and population size in the GCC countries (2020)**

COUNTRY	NUMBER OF MIGRANTS	TOTAL POPULATION	SHARE OF MIGRANTS IN TOTAL POPULATION
Bahrain	0.9 million	1.7 million	55%
Kuwait	3.1 million	4.3 million	73%
Oman	2.4 million	5.1 million	46%
Qatar	2.2 million	2.9 million	77%
Saudi Arabia	13.4 million	34.8 million	39%
United Arab Emirates	8.7 million	9.9 million	88%
<b>TOTAL</b>	<b>30.8 MILLION</b>	<b>58.7 MILLION</b>	<b>53%</b>

**Source:** Authors' calculation, based on UNDESA (2019) and UNDESA (2020).



The sizeable shares of migrants partly reflect skill shortages in the domestic workforce. GCC economies have a dual labour market in which many local citizens work in the public sector and migrants work in the private sector. For citizens, public sector employment is more attractive in terms of salary and social benefits (World Bank Group, 2018b). Considering this dynamic, migrant workers in GCC countries complement the skill sets of nationals. The specific sectors in which migrants work vary across GCC countries, and depend on skills, gender and country of birth.

Migrants to GCC countries typically take positions as low-skilled workers in the private labour market mainly in the construction and domestic sectors. They also account for important shares of the labour force in agriculture, oil and gas, manufacturing, hospitality and transportation (ILO, 2021). In the UAE, for example, 50 % of the foreign-born population work in low-skilled jobs as plant and machine operators, agricultural and fishery labourers, trades workers and assemblers. Another 20 % of foreign workers are employed as cleaners and helpers as well as low-skilled labourers in agriculture, construction, manufacturing and transport<sup>3</sup>. These proportions differ from the native population where 58 % work in highly skilled occupations, as managers, officials, professionals and technicians and only 5 % work in low-skilled employment (ILO Stat, 2020b). As they are highly over-represented in lower skilled occupations, foreign workers are more affected by the automation progress than nationals (Aus dem Moore et al., 2018). As GCC economies develop sectors where high-skilled labour will be increasingly in demand, a move away from the large base of low-income and low-skilled foreign workers who were in demand before is expected. Transition of migrants into these capital-intensive sectors will depend on their skills and might imply a shift in the categories of migrants working in GCC countries.

In addition, in an effort to address youth unemployment, dependence on foreign labour and political stability, workforce nationalisation policies are being implemented by GCC member states, aiming at generating opportunities for citizens in the private labour market (Peck, 2017). Instruments have included labour market reforms, such as quotas for nationals, restrictive visa policies and sanctions for non-compliance (Alsahi, 2020). This attempt to increase the capacity of the private sector to absorb the new workforce is present in the strategic development plans of GCC economies. Oman's 2040 goal, for instance, is for 40 % of all jobs created in the private sector be filled by Omanis, compared to the approximately 12 % in 2016 (Government of Oman, 2018). Since 2018, Oman only allows the hiring of nationals in certain sectors including IT, engineering and aviation (Gupta, 2021). In 2021, Oman also announced higher visa fees for employers hiring foreign workers, using the tax to finance vocational trainings for citizens (Nagraj, 2021).

COVID-19, and the resulting economic contraction, has intensified efforts to tighten rules on migrant admission. Notably, some countries announced they would stop issuing or renewing work permits for certain groups of migrants, based on their age or sector of work. Some GCC countries have passed laws allowing employers affected by the crisis to terminate migrant workers' contracts. These policies will have long-lasting effects on labour migration in the region (Alsahi, 2020).

Not all members of the ADD have primarily strong migration ties to GCC member states. The primary countries of origin

<sup>3</sup>Official statistics exclude migrant workers residing in company accommodation, the majority of them doing low-skilled work.

to GCC countries in the ADD are Bangladesh, India, Indonesia, Nepal, Pakistan, the Philippines and Sri Lanka. At least 25 % of all emigrants from each of those countries lives in GCC member countries. For Pakistan (53.9 %) and India (53.5 %), it is more than half of their total emigrant population (Table 2).

**Table 2. Number of migrants in the GCC countries (2020)**

COUNTRY	NUMBER OF EMIGRANTS	TOTAL NUMBER OF EMIGRANTS IN GCC COUNTRIES	SHARE OF TOTAL EMIGRATION
Afghanistan	5.9 million	0.5 million	8.5%
Bangladesh	7.4 million	3.4 million	46.6%
India	17.9 million	9.6 million	53.5%
Indonesia	4.6 million	2.3 million	49.7%
Nepal	2.6 million	0.8 million	31.3%
Pakistan	6.3 million	3.4 million	53.9%
the Philippines	6.1 million	1.7 million	27.6%
Sri Lanka	2.0 million	0.9 million	45.2%
Viet Nam	3.4 million	0.0 million	0.0%

**Source:** Authors' calculation, based on UNDESA (2019) and UNDESA (2020).

CoOs in the ADD area have specific laws and policies that govern labour migration, stipulating the qualifications and conditions needed for overseas employment. Policies in all countries include some form of mandatory pre-departure orientation (PDO) to prepare workers for their employment abroad, aiming to raise awareness and basic knowledge of migrants on the CoDs and on their rights as workers. More specifically, trainings usually focus on the working conditions in the CoD, labour laws and contract, customs and culture of the CoD, rights and responsibilities of migrants, financial literacy (remittances) and health concerns. In certain countries or migration corridors, basic language training and sector-specific skills training are also offered (Colombo Process, 2021).

CoOs have responded to the shifts in employment landscape by implementing strategies to upskill their population for employment abroad. Countries like Bangladesh, Pakistan and the Philippines, traditionally sending mostly low-skilled migrants abroad, now aim to send semi-skilled and skilled migrants. This strategic change toward diversification of skills is based on the changing labour demand in CoDs, the increasing competition between labour migrants from different countries and the realisation that skills can maximise the benefits of migration for countries of origin, through general upskilling of society, social remittances and return migration (World Bank Group, 2018a).

Pre-departure skills development programmes in CoOs are often not valued or required by employers and recruiters in the GCC countries, however, which limit their impacts. The skills training offered in technical training centres in Bangladesh, for example, are perceived by foreign employers as low quality, not matched with employers' demand and therefore not providing them a strong signal (World Bank Group, 2018a).

Intensive emigration from certain sectors may also create labour shortages in CoOs. The health care sector is one where shortages are typical, and where many workers from Bangladesh, Indonesia and the Philippines generally find work in GCC countries (Yeates and Pillinger, 2018). In 2019, 17 000 nurses from Philippines signed overseas work contracts (Aljazeera, 2020). In fact, South-East Asian countries face the largest shortage of health workers in the world according to the global threshold of at least 4.45 skilled health workers per 1 000 people (WHO, 2016). Shortages lead to reduction in services provided and poorer quality, especially since those who leave generally have high levels of training, experience, and skills (Castro-Palaganas et al., 2017). There have been attempts at minimising such negative effects of migration. Early in the Covid-19 pandemic, the Philippines government banned deployment of healthcare workers; the ban was eventually lifted and replaced with a cap of 5000 healthcare workers permitted to emigrate per year (Aljazeera, 2020).

### **What skills will be needed in the future in the ADD area?**

There is little doubt that the demand for skills related to new technologies will continue rising in the ADD area, but soft skills, which are much harder to define, will also garner much more interest and attention.

The demand will continue for specific technology-relevant skills, built on STEM and ICT fields, like computer programming, the ability to handle and manage hardware and network infrastructure, and data management. STEM subjects equip people with the problem-solving skills and technical knowledge necessary to understand and work with the ever-changing technologies that will characterise the future in any sector (British Council, 2018).

Surveys conducted with TVET institutions from the secondary to the tertiary level in Indonesia, the Philippines and Viet Nam show that institutions have a good understanding of the skills required by the 'fourth industrial revolution', but that mismatches in prospects by students remain. In the Philippines, the categories of skills of the future identified by training institutions are similar to what employers are seeking, namely technical skills

closely followed by digital and ICT skills, complex problem-solving skills and computer literacy. Nevertheless, assessments of skills and competences differed between training institutions and employers: 96 % of TVET institutions in Indonesia believed their graduates were well prepared for entry-level positions whereas only 32 % of employers in the food and beverage manufacturing and automotive manufacturing sectors agreed (Asian Development Bank, 2021).

In light of the changes and rise in demand for digital and STEM skills, ADD countries have been creating incentives for students to move into related disciplines. The UAE, for example, actively encourages youth to shift away from studying business and finance, typically seen as preparation for government jobs and move toward STEM skills, especially engineering (British Council, 2018). The UAE had spurred this change with various strategic measures to spark reforms in its education system. Spurred by its 2015 National Innovation Strategy, the UAE launched several initiatives to attract students toward STEM education, such as the Mohammed bin Rashid Smart Learning Program, Think Science and EmiratesSkills. The latter, for example, is a national competition encouraging students to embrace technology-based careers through vocational trainings (UAE Ministry of Cabinet Affairs, 2015). The Fourth Industrial Revolution strategy, launched in 2017, focuses on research in advanced sciences and artificial intelligence. Motivating youth to enrol in these key fields is a top priority of the UAE to foster a knowledge-based economy (Al Murshidi, 2019). Research and development, product design and marketing skills are also expected to grow in importance in the next years, mostly in the manufacturing, energy as well as technology, media and communications (TMC) sectors (British Council, 2018).

CoOs are also facing higher demand in STEM-related fields, and in fact the skills shortage in STEM fields in South and Southeast Asia is higher than the global shortage (45 versus 28 per cent) (ILO, 2018). The Federation of Indian Chambers of Commerce and Industry estimates that around 60 to 70 % of the IT workforce will need reskilling or retraining in sectors such as biotechnology, nanotechnology, self-monitoring analysis and reporting technology (SMART), and advanced analysis. In Indonesia, the shortages mostly concern ICT specialists with master degrees and above, and positions such as web developer/ programmer, graphic designer and Android developer are the most difficult to fill. In Thailand, shortages are present in both high-skilled and semi-skilled ICT positions (ILO, 2019).

Rapid technological change is also generating and changing the demand for soft skills, as they provide human workers a comparative and complementary advantage over technologies. In the context of automation, robot-oriented services and AI, people-to-people services may come at a higher premium and therefore reinforce the importance of interpersonal skills. In ICT occupations, skills like analytical thinking, ability to learn, problem-solving, flexibility, communication, creative thinking, teamwork and leadership are increasingly necessary. Future employment requires the capacity to adapt quickly and interdisciplinary skills are an asset (ILO, 2020). In the event of important technological changes replacing workers and rendering certain skills obsolete, the ability to cope with change and learn new skills will determine whether workers are able to remain employed with new tasks or a new job (ILO, 2018). Language skills, especially English, are among the most-demanded soft skills (British Council, 2018).

New demand for soft skills is expected to arise in occupations that were formerly mostly technical. Analytical thinking and innovation, active learning, problem-solving, critical thinking and creativity are listed as the top five skills for 2025 in the Future of Jobs Report 2020 (WEF, 2020). Creative and interpersonal skills will be in greatest demand in sectors such as sales, human resources, healthcare and education. Healthcare workers, for instance, might see a redefinition of their roles towards the translation and communication of data produced by new technologies that allow for the automation of diagnosis and personalisation of treatments. In sales jobs, creativity will be essential as traditional retail faces important online competition from e-commerce (WEF, 2016).

Soft skills are hard to quantify and there are no one-size-fits-all way of acquiring them. While soft skills are largely demanded by employers, the 2019 Global Talent Trends Report notes that 57 % of the companies surveyed struggle to assess soft skills accurately. The lack of clear formal process to quantify such skills result in assessments based on perceptions of responses to behavioural and situational questions as well as body language, which are often unconsciously biased (LinkedIn, 2019). Suggestions on how to teach such skills underline that people must develop specialised expertise before acquiring general skills like problem solving. In other words, “generic skills are often best acquired in the context of mastering specific disciplinary, trade or professional expertise” (ILO, 2018). In light of this, Technical and Vocational Education and Training (TVET) institutions in Singapore, for example, have moved away from conventional workshops and laboratories to create learning facilities that model actual workplace settings where students can pick up the soft skills necessary in a specific profession (Tan and Seet, 2020).

Labour shortages combined with the prospects of outward migration raise the risk of brain drain for CoOs. To minimise the negative consequences, ADD member countries can draw upon experiences like the ‘Pilot Project Addressing Labour Shortages Through Innovative Labour Migration Models’ (PALIM) project, implemented in 2019 by Enabel - Belgium’s development agency – in partnership with Flanders and Morocco. This skills partnership trains ICT workers in Morocco in order to respond to labour shortages and skills mismatch in this sector in both Flanders and Morocco. In this agreement, half the trainees find skilled jobs in their country, while the other half migrate to Belgium, which benefit both CoO and CoD (Enabel, 2019).

### **Are countries of origin ready for the change in employment landscape in the ADD area?**

The economies in CoOs heavily depend on the agricultural sector, although a transition toward more capital-intensive sectors is under way. In general terms, the agriculture, forestry and fishing industries continued to be the main sector of employment in 2019, with shares over total employment varying from a low of 23% in the Philippines to a high of 64 % in Nepal. The share of employment in the agricultural sector has significantly reduced since 2000 in CoOs, however, accompanied by a rise of employment in the manufacturing, construction, transport as well as wholesale and retail trade sectors. This is led by Pakistan, Sri Lanka and Viet Nam where approximately 18 % of the respective populations were working in the manufacturing industry in 2019. It is the second largest employment sector in most countries except in Afghanistan, Indonesia and the Philippines, where wholesale and retail trade was more important (ILO Stat, 2020a).

A large share of the labour force in CoOs also has no formal schooling, although the share has been decreasing.



Individuals with no formal schooling form the majority of workers in Afghanistan, Bangladesh, Nepal and Pakistan, translating to a large share of the population working in low-skilled jobs. Comparing the average educational distribution of the workforce versus that of youth aged 15 to 24 suggests an increasingly educated population. In 2017, for example, 22 % of the workforce in Nepal had completed upper secondary level whereas this proportion was 34 % for younger cohorts (ILO Stat, 2017).

The ‘fourth industrial revolution’ is expected to generate important displacement of workers in CoOs that will likely lack the necessary skills to enter new employment opportunities. In Viet Nam’s agro-processing sector for example, it is estimated that up to a third of the workforce will be displaced by 2030 as their tasks will become automated, but the positive net impact on jobs in this sector is estimated at 34 per cent. This means that job lost will be offset by job creation in most sectors, but skills development is essential for people to transition in these new jobs (Asian Development Bank, 2021).

Equipped with new skills, students in CoOs can obtain higher-skilled jobs and improve their employment outcomes. The distributional effects of digitalisation suggest that highly skilled workers benefit more from digitalisation, as they tend to perform tasks that are complementary with technology (OECD, 2021). Enrolment rates in tertiary education have increased since 2000, but the speed of this transformation has varied between countries. Indonesia, the Philippines, India and Viet Nam have the highest graduation ratio at the university level, while enrolment in tertiary education remains low in Afghanistan, Bangladesh, Nepal, Pakistan and Sri Lanka (World Development Indicators, 2021a). Among university graduates, the share of people graduating from programmes related to STEM fields was 11 % in Bangladesh, 23 % in Viet Nam, 32 % in India, 19 % in Indonesia and 29 % in the Philippines<sup>4</sup> (World Development Indicators, 2021b).

Strategies to leverage the potential of digital technologies are fundamental to navigate the ongoing changes. Recent strategies in India, Indonesia, the Philippines and Viet Nam aim at adopting advanced technologies in industrial sectors, and such efforts have accelerated since the Covid-19 pandemic began (OECD, 2021). Many challenges remain, ranging from lack of digital awareness, shortage of skilled labour, limited budgets, inadequate infrastructure and weak cybersecurity (OECD, 2021). Viet Nam stands out as one of the few countries whose policies are in line with international best practices on the readiness and adaptability of education and training curriculums towards emerging skill needs. This was not the case in an assessment of strategies in Cambodia, Indonesia and the Philippines (Asian Development Bank, 2021). Recently, however, the Philippines established a nationwide mapping of 21st century skills through consultations with employers to identify emerging skills needs and gaps in the workforce skills. The Philippines’ National Technical Education and Skills Development Plan also considers the impacts of the ‘fourth industrial revolution’ on jobs and skills (Asian Development Bank, 2021).

<sup>4</sup> The latest year for which this data was available differs between countries, but all data is from 2016 to 2019. Data is unavailable for Afghanistan, Nepal, Pakistan and Sri Lanka.

One area of particular concern is vocational training. Enrolment in vocational education remains low in ADD CoOs. TVET programmes, aiming at the acquisition of knowledge, skills and competencies for entering the labour market are viewed as second-class and less prestigious, which explains why general education is preferred. Compared to Finland and the United Kingdom, for example, where the share of secondary level students enrolled in vocational training was above 45 % in 2016, most emerging Asian countries have low enrolment. The share in the Philippines, for example, was about 6 % in 2017, and in India, less than 2 per cent. In Indonesia, the rate is nearly 20 % of secondary students enrolled in vocational training, following a reform of the country's TVET system that aimed to ensure a better linkage with the skills demanded in the labour market. Around 56 % of Indonesian vocational secondary schools focus on ICT and about 46 % on technology and engineering (OECD, 2019a).

General internet usage is also growing in ADD CoOs, which equips the populations with new skills and opportunities, outside of the formal educational system. It is particularly high in Viet Nam (70 %) and the Philippines (60 %), average in Indonesia (40 %), Sri Lanka (34 %) and India (32 %), and low in Nepal (21 %), Bangladesh (18 %), Pakistan (17 %) and Afghanistan (11 %). The average usage across CoOs remains lower than in OECD countries (83 %) and GCC countries (ranging from 80 % to 99 %) (World Development Indicators, 2018). Additionally, women have less access and make less use of digital technologies.

### **How can educational and migrant recruitment systems adapt to changes in skill demand?**

Future technology-driven ecosystems will require advanced logistics, high-speed internet connectivity and sophisticated infrastructure, but also specialised skills (OECD, 2018). The transition to knowledge-based economies will depend on the ability of countries to develop and leverage human capital, so that workers are more productive and technologically well equipped. Adapting migrant recruitment systems will also be key in ensuring that changes in the demand for skill are taken into account in the readiness of potential migrants.

Technological innovations will affect countries and workers differently, requiring differentiated skill development programmes. Workers who lose their jobs will likely need to retrain, learn new skills and potentially shift to new sectors. Others will experience changes in the tasks they are asked to perform and will need to upgrade certain skills, through short-term or on-the-job trainings. Future workers who join the labour market will need to be prepared with adequate skills in their education journey (Asian Development Bank, 2021).

Education systems in GCC countries mostly focus on credentials rather than skills demanded by private sector employers. In the public sector, where citizens commonly find employment, obtaining credentials – a diploma, a degree or a certificate – has been emphasised more than acquiring skills. Consequently, memorisation, rather than critical thinking and problem-solving, collaborative teamwork, and socioemotional and digital skills, features prominently in school curricula in GCC countries (El-Saharty et al. 2020). A modernisation of the educational curriculum, from credentials to skills, from schooling to learning, is needed to have an education system that focuses on competencies needed in the new economy. This is especially the case for vocational and technical

education, and higher education. As an example, Finland has notably implemented such a reform to promote twenty-first century transversal competences as well as life-long and life-wide learning. The Finnish curriculum includes a focus on language and digital skills and uses collaborative classroom practices to engage students (Lavonen, 2020).

Global competition for high-skilled migrant workers has increased with digitalisation. The OECD Skills Outlook 2019 shows a growing demand for different positions that require digital skills such as software and applications developers, database and network professionals and ICT operations technicians (OECD, 2019b). Due to high labour demand and skills shortages in ICT sectors, several countries, like Canada, China and Germany, have implemented favourable visa policies to attract workers with digital skills. India is a large supplier of ICT workers and recent graduates, who typically obtain jobs in the United States, the United Kingdom and European countries (ILO, 2020). GCC countries will face increased competition to attract workers with the right skills for their developing technology-intensive sectors.

Enabling women to benefit from the shift in the changing demand for skills will also be fundamental. Indeed, at the university level, women in GCC countries make up more than 50 % of enrolled students in Science, Technology, Engineering and Math (STEM) fields. Enrolment of women especially outnumbers that of men in Natural sciences, Math and Statistics programmes, accounting for 57 % of students in the UAE to 85 % of students in Bahrain. Women are also more numerous than men in ICT programmes in Oman, Qatar and the UAE, although closer to a 50% share (Islam, 2019). The rise of digital jobs present opportunities for women as they offer benefits like flexibility and project-based work models (PwC, 2017).

As ADD countries develop the human capital of their populations, labour migration systems need to be able to recognise, evaluate and target skills in demand. Migration recruitment systems are also key in advancing 'fourth industrial revolution' skills, by acting as bridges between sending and receiving economies. A rethinking of pre-departure orientation trainings, for example, might ensure their relevance in the context of increasing use of technologies.



### **What is the role of the ADD in preparing for the future demand in skills**

The GCC labour market is in flux and the ADD will play a crucial role in creating dialogue, particularly around the issues of credential certification, migration partnerships based on skills development in both CoOs and CoDs, data sharing and bringing education and employment sectors closer together. GCC countries are actively seeking to move to higher value technology sectors, which will have a direct effect on the existing migration mechanisms on which both GCC countries and South and Southeast Asian countries are dependent. CoOs have been transitioning to higher-tech sectors, but at a slower pace than their CoDs counterparts. Thus, there will likely continue to be a disparity of economic opportunities between ADD countries, and therefore demand for migration.

**Here are five areas in which the ADD's role will be pivotal in establishing partnerships and solidifying a smooth and resilient future of labour in both CoOs and CoDs:**

- *Map and harmonise skills development programs in countries of origin with labour demand in countries of destination*

The future of employment will impact the supply and demand of skills. Good preparation will require mapping exercises from several angles - understanding what skills exist in both CoOs and CoDs, but also what employers in CoDs are and will be demanding in the future. Not only will CoOs need to develop skills portfolios and mapping of workers in their own countries, in coherence with ambitions and plans in CoDs, but such programmes will also need to determine and define such skills, beyond those that are already well-known and defined today, and elaborate a plan to evaluate them. The ADD can then foster an area-wide strategy to incentivise students and older workers to gain skills in demand in the future, target specific groups, such as women and help develop a culture of life-long learning amongst both employers and employees.

- *Implement migration mechanisms that ensure the recognition of existing education credentials by employers in countries of destination*

In addition to mapping and harmonising skills programmes, the ADD has a role in ensuring that credentials certifying general education or Technical and Vocational Education and Training (TVET) are recognised by foreign employers in CoDs – fundamental in laying the groundwork for a smooth transition of migration systems into the future of work landscape. Implementing mechanisms to recognise and value the skills acquired by migrant workers in their CoOs can incentivise governments to invest more in development programs, as well as facilitate upskilling by migrants themselves, which will also benefit CoDs by filling skilled labour gaps. Such mechanisms should be implemented directly in national development strategies, as well as strategies explicitly pertaining to migration. An important element in skills recognition will be the definition of soft skills in demand in the future.

- *Create skills partnerships that benefit both countries of origin and destination*

Higher demand for skills in the future may generate competition for skilled migrant workers. Both CoOs and CoDs can gain from labour migration by establishing partnerships to fill labour gaps on

both sides. To minimise potential negative consequences of high skilled migration and retain skilled workers in CoOs, member countries can develop partnerships to train workers with specific skills in CoOs in order to respond to labour shortages and skills mismatch in a specific sector in both CoOs and CoDs. Such partnerships can leverage lessons learned from existing programmes in other parts of the world, including the PALIM programme between Belgium and Morocco targeting ICT workers.

- *Spur dialogue between educational institutions and employers at the national level*

Alignment between education and training institutions with the private sector, on issues such as critical skills required by the ‘fourth industrial revolution’, the relevance of educational and training curricula, and skills certification systems will be key to adapting the shift in skills demand. More collaboration and co-ordination between educational institutions and employers is needed in the ADD area in order to reduce existing and potential future gaps in skills, including ill-defined soft skills. Employers will need to be more integrated in the education cycle, integrating apprenticeships and life-long learning concepts, within and between CoOs and CoDs

- *Enhance and encourage data-sharing across ADD member states*

The ability to effectively navigate the future of work landscape and the shifting demand in skills in the ADD area will be enhanced with access to the right data and harmonising evidence-based planning. Better data sharing and harmonisation can help minimise skills shortages and mismatches in both CoOs and CoDs. As such, the ADD’s role in creating platforms for better data sharing not only between employers and education institutions, but also between line ministries, private sector, civil society and local governments across different countries on key indicators of the future of work landscape will be essential.

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## **IMPACT OF COVID-19 ON LABOUR MOBILITY FRAMEWORKS IN THE ABU DHABI DIALOGUE CORRIDORS.**

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## EXECUTIVE SUMMARY

The COVID-19 pandemic is creating a great reset moment for countries in the Abu Dhabi Dialogue (ADD) as it creates new challenges, as well as new opportunities for labour mobility in these corridors. The closure of national borders and cross-border movements affected both the supply and the demand for migrant labour in the ADD corridors. As countries are looking to gradually reopen their labour markets, the reduced mobility, as well as the increase in the cost of hiring migrant workers with the need for testing, quarantines, vaccination will disrupt the easy and low-cost availability of migrant workers that existed pre-COVID-19.

Accelerating the shift towards a high-skilled, diversified economy in the Gulf region will see a demand, and even competition, for higher-skilled workers, including migrants. At the same time, the demand for low-skilled workers may decline with automation, but migrants will remain in the short term. These changes present an opportunity: a race to the top to enhance legal labour migration channels, improve labour mobility, ethical recruitment, skills partnerships both in Countries of Origin and in Countries of Destination and improving social protection of migrant workers.

It is too early to draw out a definite trend for the emerging labour mobility frameworks post-COVID-19, but it is clear that public health considerations will become as important as economic objectives. By bringing together countries of origin and destination in the ADD corridors in the Gulf region and Asia, the Abu Dhabi Dialogue is uniquely positioned to work towards its goal to enable safe, orderly, and regular labour migration.

## INTRODUCTION :

The COVID-19 pandemic is creating a great reset moment for countries in the Abu Dhabi Dialogue (ADD) as it creates new challenges, as well as new opportunities for labour mobility in these corridors. The existing economic and labour market model in the Gulf countries of destination is one, in which migrant labour, and crucially labour mobility, is underpinning the highly oil-based, labour-intensive economies. As a result, the share of migrants in the employed population in these countries is among the highest in the world - over 95% of the labour force for construction and domestic work in the Gulf region is comprised of migrant workers<sup>1</sup>. On the other hand, countries in Asia are some of the main countries of origin for these migrant workers and their economies are in turn highly dependent on the remittances and savings of migrants both in terms of business investments, as well as for families and household subsistence.

The COVID-19 pandemic forced the closure of national borders and cross-border movements and this affected both the supply and the demand for migrant labour in the ADD corridors. Migrant workers, especially women, are among those most affected by the pandemic, seeing losses of jobs and a reduction in wages. Migrants have also been on the frontline of the COVID-19 response working in key sectors such as healthcare, sanitation, deliveries, among others. As countries are looking to gradually reopen their labour markets, the reduced mobility, as well as the increase in the cost of hiring migrant workers with the need for testing, quarantines, vaccination will disrupt the easy and low-cost availability of migrant workers that existed pre-COVID-19.

The pandemic also exposed the gaps in social protection related to migrant workers, they have borne the brunt of the pandemic, often without adequate social protection in place. A wide range of emergency measures were adopted to extend social protection to some of the most vulnerable to the crisis.

The pandemic is also accelerating processes that were already taking place in the region, such as the shift away from oil to sectors of the economy such as tourism, technology, renewable energy; and an increasing demand for higher skilled migrants; the development of technology and the advances in automation of certain jobs, including low-skilled; and nationalization of the workforce in the private sector.

These changes present an opportunity: a race to the top with enhanced legal labour migration channels, including ethical recruitment, and raising standards in areas such as healthcare and housing, but also broadly in terms of social protection of migrant workers. Accelerating the shift towards a high-skilled, diversified economy in the Gulf region will see a demand, and even competition, for higher-skilled workers, including migrant workers. The demand for low-skilled workers may decline with automation, but migrant workers will remain central in the short term due to the low wages and lack of interest from nationals in these jobs.

<sup>1</sup>World Migration Report, 2020, IOM Publications: [https://publications.iom.int/system/files/pdf/wmr\\_2020.pdf](https://publications.iom.int/system/files/pdf/wmr_2020.pdf)

Equally, as government support is wound down and economic recession hits as a result of the twin shock of COVID-19 and the slump in oil prices<sup>2</sup>, there is a likelihood of a public backlash against migrants. This was seen during the pandemic and if left unchecked, calls for reducing migration are likely to continue and intensify across the Gulf region. This could lead to tightening and reducing legal migration frameworks, which in turn could lead to increasing irregularity and exploitation of migrant workers, especially in the low-skilled, low-wage and domestic workers' sector.

This paper looks specifically at the emerging legal and policy framework for labour mobility in the Abu Dhabi Dialogue corridors in the post COVID-19 era and attempts to map out the changes taking place. The research is part of the wider Abu Dhabi Dialogue Research Agenda Thematic Area 1 looking into Anticipated changes in the employment landscape in the GCC and its impact on labour supply and demand in ADD corridors. The paper is based on background research and relies on interviews with key government stakeholders and experts in the field of migration from: Bahrain (Ausamah Alabsi, migration expert and former CEO of the LMRA), Kuwait (Mubarak al-Azmi, Deputy General Manager for Labour protection and Jaber al-Ali, Head of International Relations Department, Public Authority for Manpower, and Shaikha Al-Hashem, academic and author), UAE (HE Abdullah Alnuaimi, Assistant Undersecretary for International Relations and Communications at the Ministry of Human Resources and Emiratization) and the Philippines (Sarah Arriola Undersecretary for Migrant Workers' Affairs, Ministry of Foreign Affairs).

On the basis of these emerging trends, recommendations have been developed with a view of furthering the implementation of the Abu Dhabi Dialogue's (ADD) objectives to facilitate safe, orderly, and regular labour migration<sup>3</sup>.

<sup>2</sup>World Bank, GCC Economic Outlook, April 2021: <https://www.worldbank.org/en/country/gcc/publication/economic-update-april-2021>

<sup>3</sup> Abu Dhabi Dialogue: <http://abudhabidialogue.org.ae/about-abu-dhabi-dialogue>

## IMPACT OF COVID-19 ON LABOUR MOBILITY IN THE ADD CORRIDORS

COVID-19 dramatically impacted the flow of migrant workers in the ADD corridors as borders were closed, lockdowns were imposed, and economic and social activity was significantly reduced.

### Returning migrant workers from the Gulf region

This resulted in a large outflow of migrants from the Gulf region, with workers returning to their countries of origin. Based on available data, approximately 1.25 million migrants left the Gulf region between May and October 2020. This included nearly 400,000 Filipino migrant workers – the biggest repatriation operation in the country’s peacetime history. However, it is likely the numbers are higher as there are many more that would like to return but are unable to do so due to travel restrictions, exit visas depending on employers, lack of funding, etc.

The table below presents some indicative numbers on returned migrant workers from the Gulf countries<sup>4</sup>.

COUNTRY	NUMBER OF RETURNED	DATE RETURNED
India	400,000	May/ June 2020
Philippines	389,000	October 2020
Bangladesh	217,000	January/ June 2020
Indonesia	90,000	May 2020
Nepal	50,000	June/ August 2020
Sri Lanka	5,727	May 2020

<sup>4</sup>The table has been compiled on the basis of a wide range of sources: J. Slater, K. Fahim, K. McQue ‘Migration, in reverse’, (October 1, 2020) The Washington Post: <https://www.washingtonpost.com/graphics/2020/world/coronavirus-migration-trends-gulf-states-india/>; ‘National Task Force Coronavirus Disease-2019’, (October 6, 2020): [https://ndrrmc.gov.ph/attachments/article/4036/Update\\_Sitrep\\_no\\_188\\_re\\_NTF\\_COVID19\\_as\\_of\\_06OCT2020.pdf](https://ndrrmc.gov.ph/attachments/article/4036/Update_Sitrep_no_188_re_NTF_COVID19_as_of_06OCT2020.pdf); M.N.I. Sorkar, ‘COVID-19 Pandemic Profoundly Affects Bangladeshi Workers Abroad with Consequences for Origin Communities’, (July 9, 2020), Migration Policy Institute: <https://www.migrationpolicy.org/article/covid-19-pandemic-profoundly-affects-bangladeshi-workers-abroad-consequences-origin>; ‘Concern in Indonesia over returning migrants’, (May 11, 2020): <https://www.9and10news.com/i/the-latest-concern-in-indonesia-over-returning-migrants/>; C.K. Mandal ‘At least 500,000 migrant workers want to return home at the earliest, says report’, (May 21, 2020) The Kathmandu Post: <https://kathmandupost.com/national/2020/05/21/at-least-500-000-migrant-workers-want-to-return-home-at-the-earliest-says-report>; C. Attanayake, ‘Repatriating Migrants during COVID-19: Challenges for the Sri Lankan Government’, (June 6, 2020) ISAS Briefs, Available at: <https://www.isas.nus.edu.sg/papers/repatriating-migrants-during-covid-19-challenges-for-the-sri-lankan-government/>

In the future, it is expected that employment across the region will fall by around 13% with losses of some 900,000 jobs in the UAE and 1.7 million jobs in Saudi Arabia; the migrant worker population in some countries may drop by as much as 10%<sup>5</sup>.

This substantial outflow of migrant workers may mean that the Gulf countries ‘export’ some of the impact of the recession. However, as economic activity gradually resumes, it is also expected this outflow will lead to labour shortages and adverse effect on key sectors, such as hospitality, construction, and healthcare.

Among those leaving there is a substantial number of high-skilled migrants whose departure was triggered by the pandemic – by health concerns, job and income losses and the overall uncertainty it created<sup>6</sup>. The outflow of educated professionals carries risks for the economies in the Gulf region, as many sectors would find it difficult to replace skilled professionals in the high numbers needed despite ongoing efforts of training and workforce nationalization across the region. According to the Indian embassy in Kuwait, about 28,000 Indians are working for the Kuwaiti government in various jobs like nurses, engineers in national oil companies and a few as scientists, while the majority work in the private sector. Other large high-skilled migrant communities from the ADD countries include Egypt, Pakistan, and the Philippines<sup>7</sup>.

### Reintegration of migrant workers in countries of origin

To address the needs of high numbers of returning migrants, some countries of origin have established specific return and reintegration programs to assist their nationals in entering the labour markets upon their return.

The Philippines government marked 5.2 billion USD for the returning overseas workers including cash assistance through its ‘Help is Within Reach’ Program. It includes interim monetary assistance, welfare package, emergency educational fund for children of COVID-19 affected overseas Filipinos<sup>8</sup>.

In India the Skilled Workers Arrival Database for Employment Support (SWADES) programme aims to create a database of qualified returning professionals that records their skill sets and experiences.<sup>9</sup> Details regarding job designation, educational qualification, work sector and total work experience can be shared with Indian and foreign companies so that they can offer relevant jobs to the returnees.<sup>10</sup> This information is linked to the Aatmanirbhar Skilled Employee Employer Mapping (ASEEM) – an online job search portal for those repatriated from the Gulf countries.

<sup>5</sup>“Gulf Business, Expat population in some GCC states may drop by up to 10% – report”, 24 May, 2020, Gulf Business Available at: <https://gulfbusiness.com/expat-population-gcc-states-may-drop-10-report/>

<sup>6</sup>S. Al-Hashem, G. Martin, “COVID-19’s Implications for Foreign Labour Outflow in Kuwait”, May 19, 2020, London School of Economics, Available at: <https://blogs.lse.ac.uk/mec/2020/05/19/covid-19s-implications-for-foreign-labour-outflow-in-kuwait/>

<sup>7</sup>S. Siddiqui, “GCC faces possible setback with exodus of skilled professionals”, 22 June, 2020, Al-Monitor, Available at: <https://www.al-monitor.com/originals/2020/06/gulf-state-gcc-exodus-saudi-arabia-wokers-uae-kuwait.html>

<sup>8</sup>“Bayanihan 2 for workers: DOLE to meet aid deadline”, Republic of the Philippines Department of Labour and Employment, December 8, 2020, Available at: <https://www.dole.gov.ph/news/bayanihan-2-for-workers-dole-to-meet-aid-deadline/>

<sup>9</sup>S. Nambiar “India to conduct skill mapping of citizens returning from overseas”, June 4, 2020, Business Traveller, Available at: <https://www.businesstraveller.com/business-travel/2020/06/04/india-to-conduct-skill-mapping-of-citizens-returning-from-overseas/>

<sup>10</sup>L. Priya, “Labour Sector Reforms in the GCC and Challenges for Indian Expatriates”, November 27, 2020, <https://idsa.in/issuebrief/labour-sector-reforms-in-the-gcc-lpriya-271120>

Similarly, the Overseas Employment Corporation of Pakistan launched a portal which has registered around 70,000 jobless workers in order to guide the returnees in identifying opportunities both in Pakistan and abroad. The Overseas Pakistani Foundation has been working to recover residual salaries from workers' foreign employers.

In Nepal, the government has allocated USD 98 million for creating additional 200,000 jobs and is prioritising returnee migrant workers for those jobs. It also allocated funding for psycho-social counselling services for returnees.<sup>11</sup>

These re-integration measures are important, however, they are broadly considered as temporary, until foreign recruitment reopens across the Gulf, and labour migration will continue to be a key economic driver in many of the countries of origin. For example, India has a labour force of over 400 million and a young population so every year it needs to generate 10-12 million new jobs. It has also stated its goal to become the skill capital of the world, training its young workforce not only for the domestic economy but for abroad as well, so sending skilled labour abroad will continue to be one of its major policies.<sup>12</sup> The Philippines also has a young population and emigration for work will remain a defining feature for the foreseeable future<sup>13</sup>.

<sup>11</sup> I. Dhungana, A. Ghimire "Left behind, anxious and forgotten: the impact of COVID-19 on the wives of migrants", October 15, 2020, MIDEQ, Available at: <https://www.mideq.org/ar/blog/left-behind-anxious-and-forgotten-impact-covid-19-wives-migrants/>

<sup>12</sup> "COVID-19 Global Roundup: Expatriate exodus in Gulf countries", (May 8, 2020), CGNT Available at: <https://news.cgnt.com/news/2020-05-08/COVID-19-Global-Roundup-Expatriate-exodus-in-Gulf-countries-Qkabps4nYs/index.html>

<sup>13</sup> Interview with Sarah Arriola Undersecretary for Migrant Workers' Affairs, Ministry of Foreign Affairs of Philippines, 12 January 2021

## EMERGING NEW FORMS OF LABOUR RELATIONS

### Interim COVID-19-related measures

In the beginning of the COVID-19 pandemic there were returns of, mostly irregular migrants, that were carried out by some countries. Many Gulf governments broadly enacted measures to improve the situation of migrant workers, including those with irregular status, which were widely recognized as best practices. These included visa extensions, reduction or waving of visa renewal fees and amnesties for irregular migrants. In addition, access to free COVID-19 healthcare was provided, as well as later on access to vaccination for all residents, including some categories of irregular migrants. Measures mandating the provision of socially distanced accommodation for migrant workers were also introduced in some countries. These were considered temporary measures and it is unclear if and how they will be extended into this new post-COVID-19 period.

Further to the interim measures in place, below are some of the new changes and trends that have been observed in ADD corridor countries with regard to labour mobility, as countries are preparing to re-open their labour markets to international recruitment.

### Healthcare, vaccination, and labour mobility

Due to the demographic composition of countries in the Gulf region, access to medical services and COVID-19 vaccination and will be instrumental in the development or hinderance of labour migration going forward.

During the initial period of the pandemic, countries in the region all extended access to healthcare for migrants, both regular and irregular, for COVID-19 related treatment and testing. To facilitate access to healthcare, the Ministry of Health of Bahrain also suspended the BD7 medical consultation fee or health fees for non-Bahrainis.<sup>14</sup> All Gulf countries also provided equal access to vaccination for both citizens and residents, and this includes in some cases residents with expired documentation (in Bahrain, UAE and KSA).

The costs of medical provision for migrants will ultimately raise the costs of employing them. In Kuwait, recruitment costs prior to COVID-19 were capped at 990 KD (2900 USD) but an additional 500 KD (1656 USD) have been added to cover the cost of quarantining incoming migrants, performing multiple PCR tests, and providing general medical services<sup>15</sup>.

From the perspective of countries of origin, vaccination of migrant workers is also a priority area. In the Philippines returned overseas workers are prioritised in the national vaccination strategy as the expectation is that they can return to the country of destination once travel and recruitment resumes<sup>16</sup>.

These rising costs are creating weariness for both migrants and employers about who might incur the costs of medical services, while for employers and governments this will likely increase the incentive to retain workers both on a company level, as well as on a country level.

<sup>14</sup> Vinita, "Bahrain: Health Ministry Suspends BD7 Fee for Expats", 10 April, 2020, Gulf Insider, Available at: <https://www.gulf-insider.com/bahrain-health-ministry-suspends-bd7-fee-for-expats/>

<sup>15</sup> Interview with Mubarak al-Azmi, Deputy General Manager for Labor protection of the Public Authority of Manpower in Kuwait, 25 January 2021

<sup>16</sup> Interview with Sarah Arriola Undersecretary for Migrant Workers' Affairs, Ministry of Foreign Affairs of Philippines, 12 January 2021



### Mobility within the labour market

The reduction of the labour supply as a result of COVID-19 imposed restrictions on travel and will become a challenge in the short term when it comes to reopening economies across the Gulf region. Already some sectors, like hospitality, are reporting shortages of staff locally.

The UAE is seeking to address this by enhancing the mobility within its labour market through the establishment of a Virtual Labour Market Platform: [www.careers.mohre.gov.ae](http://www.careers.mohre.gov.ae) by the Ministry of Human Resources and Emiratization (MOHRE). This followed Ministerial Decree Number 279 (2020) which stipulated that companies affected by the precautionary COVID-19 related measure and have made employees redundant, must register the information of these employees so that they can be recruited by other companies based on the jobs market needs. Any companies or businesses seeking to employ non-Emirati workers during the period of stopping the overseas employment must post their vacancies on the Virtual Labour Market, search the available employees' database. The platform then matches the requirements of the jobs posted by UAE companies with the job seekers' profiles. Work permissions should then be obtained electronically where a suitable candidate is identified, by applying to MOHRE. A similar online platform – Talent Platform was created by the Labour Market Regulatory Authority (LMRA) in Bahrain: [www.talentportal.bh](http://www.talentportal.bh) to connect jobseekers and employers and was launched in 2021.

The UAE is using the current stop on foreign recruitment to redesign some parts of its visa policy, which was previously met with resistance, and to improve the recruitment process to ensure it enhances legal labour migration<sup>17</sup>. This concerns particularly reforming the visit visa category, which is often linked to the practice of visa trading. Visit, or tourist visas, are currently available for nationals of countries who are not eligible for visa on arrival or visa-free entry. The visit visa can be issued for 30 days or 90 days for single or multiple entries. Tourist visas can be extended for 30 days twice, without the need to leave the country. In some cases, migrants enter on a visit visa but then overstay and work irregularly. To regularize this process, the UAE is introducing a new type of work permit which can be applied for in the country of origin and, significantly, will also cover domestic workers. It will be valid for 2 years, will not be linked to a specific employer and will allow employees to work for multiple employers, as well as part time. This work permit will become active once the international recruitment market reopens and the price is expected to be 36 USD<sup>18</sup>. With these measures the UAE is hoping to allow migrants who arrive on a tourist or work visa or those who are already in the country to move from sectors where there are no jobs to sectors where there may be more opportunities<sup>19</sup>.

<sup>17</sup> Interview with HE Abdullah Alnuaima, Assistant Undersecretary for International Relations and Communications in UAE, 2 December 2020

<sup>18</sup> Interview with HE Abdullah Alnuaima, Assistant Undersecretary for International Relations and Communications in UAE, 2 December 2020

<sup>19</sup> Interview with HE Abdullah Alnuaima, Assistant Undersecretary for International Relations and Communications in UAE, 2 December 2020



Bahrain pre-COVID-19 had one of the most flexible labour markets in the Gulf with a self-employed Flexi permit introduced in 2018 which allowed for self-employment. However, as the economic recession is creating future uncertainty there are increasing calls in the media and in the public space to limit the scope of the Flexi permit. In January 2021, the lower house in Parliament – the House of Representatives adopted a bill to extend the period a migrant worker must remain with their current employer from one to three years. The reasons for this were cited as the need to protect Bahraini entrepreneurs and give advantage to Bahraini workers. Some MPs have said this legislation if adopted will be a reversal in the reforms of the sponsorship system in the country<sup>20</sup>. There has still not been any official announcement on whether these changes will be adopted by the government.

### Labour agreements and skills mobility partnerships

It has also become apparent during the current COVID-19 crisis that workers in all skills levels are equally important. Many countries that have experienced a significant need for qualified healthcare professionals (doctors, nurses, laboratory technicians, radiologists, etc.) have similarly expressed a need for health-related low and medium skilled support staff (such as care workers and hospital cleaners)<sup>21</sup>.

The UAE sees Bilateral Labour Agreements (BLAs) and Memoranda of Understanding (MoUs) as tools for improving the recruitment process. It aims to do that by introducing additional measures to increase protection for migrant workers in agreements that will be concluded once international recruitment resumes<sup>22</sup>.

Similarly, the Philippines is also working in this direction with a new department that has been established to deal solely with migration and foreign employment as a response to COVID-19. Due to the pandemic, and recognizing the importance of healthcare, the Philippine government will introduce a standard employment contract that will seek to include healthcare provisions, along with provisions related to housing standards on future labour agreements<sup>23</sup>.

The Embassy of Bangladesh in Bahrain has developed an initiative which is an example for upskilling of the migrant workforce already in country of destination. It is aimed at unskilled workers to improve their career prospects in the construction sector. The training is supported by the Embassy, delivered through a licensed training centre and upon completion the Embassy works with a recruitment company to facilitate placement within the construction industry across Bahrain. The program will start with 200 and cover a total of 1000 Bangladeshi workers, who will receive a certificate upon completion. The training programme covers a number of key areas including: personal skills improvement, communication skills, health and safety induction with COVID-19 focus, theory and workshop training, as well as on-site practical field work training. The programme is ready to start with the first 200 pending approval from the Bangladeshi government.

<sup>20</sup> ‘Proposed Return to Sponsorship System at Odds with International Law’, 12 January 2021, Al-Ayam, Available at: <https://www.alayam.com/online/local/888794/News.html>

<sup>21</sup> The Future of Human Mobility: Innovative Partnerships for Sustainable Development  
Theme 2: Skilling Migrants for Employment, GFMD 2020

<sup>22</sup> Interview with HE Abdullah Alnuaima, Assistant Undersecretary for International Relations and Communications in UAE, 2 December 2020

<sup>23</sup> Interview with Sarah Arriola Undersecretary for Migrant Workers’ Affairs, Ministry of Foreign Affairs of Philippines, 12 January 2021

### Permanent residency

The UAE has also officially launched a permanent residency system, this is the first of this kind in the Gulf region where permanent residency and citizenship for migrants have long been unavailable. The Golden Card will be granted for distinguished individuals with exceptional talents<sup>24</sup>. The new system enables foreigners to live, work and study in the UAE without the need of a national sponsor. These visas will be issued for five or ten years and will be renewed automatically. Eligible are individuals who make public investments of at least AED 10 million or with specialized talents and researchers in the fields of science and knowledge such as doctors, specialists, scientists, inventors, as well as creative individuals in the field of culture and art. The visa's advantages are extended to the spouse and children and has been granted to 6,800 foreigners so far<sup>25</sup>.

The lack of permanent residency options and the lack of healthcare and social protection linked to residency, were cited among the main reasons why many migrants, especially highly skilled went back. This was one of the reasons why the Philippines saw large waves of returning migrants from the Gulf, but not from Europe and the US because in these countries migrants have access to the healthcare system and to state support in case they lost their jobs<sup>26</sup>.

### Insurance and Wage Protection Systems

The pandemic has affected employers and businesses across the region and has resulted in millions of migrant workers losing their jobs or their wages have been reduced or their employers have gone bankrupt leaving migrants awaiting compensation for their unpaid wages and end of service payments.

The UAE has taken steps to enhance the system for wage protection and compensation for unpaid wages, which existed before the pandemic, but are now being reinforced. This includes the introduction of an insurance system for employers who need to pay 600USD for the insurance which will be used to cover unpaid wages, end of service agreements and repatriation costs. In the UAE, these account for about 80% of all work-related disputes<sup>27</sup>.

Saudi Arabia also introduced an insurance in July 2020 aimed at protecting migrant workers in the private sector, the decision includes that the state will bear the costs of implementation. The insurance will protect migrant workers in the event of bankruptcies, covers unpaid wages, and repatriation costs. A committee comprising representatives from the Ministry of Human Resources and Social Development, the Ministry of Finance, and the Saudi Arabian Monetary Agency (SAMA) is working to: classify workers targeted by the insurance policy, setting the necessary controls and mechanisms and determine the value of the insurance policy<sup>28</sup>.

<sup>24</sup> Interview with HE Abdullah Alnuaima, Assistant Undersecretary for International Relations and Communications in UAE, 2 December 2020

<sup>25</sup> "Golden visa - Long-term residence visas in the UAE", 7 Jan 2020, U.A.E, Available at: <https://u.ae/en/information-and-services/visa-and-empirates-id/residence-visa/long-term-residence-visas-in-the-uae>

<sup>26</sup> Interview with Sarah Arriola Undersecretary for Migrant Workers' Affairs, Ministry of Foreign Affairs of Philippines, 12 January 2021

<sup>27</sup> Interview with HE Abdullah Alnuaima, Assistant Undersecretary for International Relations and Communications in UAE, 2 December 2020

<sup>28</sup> "Saudi Arabia unveils 'insurance product' to protect foreign workers' rights", July 17, 2020, Saudi Gazette, Available at: <https://saudigazette.com.sa/article/595628>

In addition to insurance policies, countries are strengthening the Wage Protection Systems (WPS). The LMRA announced the introduction of a WPS in the private sector in Bahrain starting in May 2021 for companies with employees above 500 and in January 2022 for companies with less than 50 employees<sup>29</sup>. Lessons learned from the existing WPS need to be reinforced to ensure they achieve the intended outcome to enhance protection and ensure migrants are paid according to their contractual agreements. Moreover, Saudi Arabia has also added additional enhancements to their WPS as of December 2020. The new additions include extending implementation of the program to 100% application, with the program now covering all private sector companies and employees. Secondly, a new version of the program has been launched through the «Mudad» platform to encourage private sector companies to commit to the payment of wages at the rate and during the timeframe stipulated by law.<sup>30</sup>

### Technology and automation

Advances in technological change and automation will depend on the interplay of several uncertain factors, including those that relate to the public health situation.

During the pandemic, technology enabled many skilled and highly skilled workers to shift to working online, from home and virtual meetings, as well as further shifting consumption to online platforms. New spheres of the digital economy are emerging such as - e-consultation, e-health monitoring, e-learning, automated mining, and safety and sanitation<sup>31</sup>. Therefore, technological changes and automation are expected to lead to the reduction in certain jobs by approximately 45% and those most affected are expected to be workers with low to medium levels of education and experience, but this shift also creates new employment opportunities to accommodate the growing younger demographic of nationals and generates alternate means of economic growth in the Gulf.<sup>33</sup>

The shift to working remotely for example, also opens opportunities for work to be done by workers who are in another country, in a way that was not possible before. There are some examples of this happening in the area of private education, where teachers were unable to return to the Gulf and held lessons online from their home locations<sup>34</sup>.

Despite emerging opportunities of the platform economy, it is important for governments to ensure that the platform economy becomes an integral part of the formal economy so that the workers employed there will pay taxes and social security contributions.

<sup>29</sup> <https://www.fragomen.com/insights/alerts/implementation-wage-protection-system-forthcoming>

<sup>30</sup> “Saudi Arabia implements final phase of wage protection program today”, December 1, 2020, Arab News, Available at: Saudi Arabia implements final phase of wage protection program today (arabnews.com)

<sup>31</sup> R. Sadaqat, ‘Investments in ICT to drive digital economy’, (September 1, 2020), Khaleej Times, Available at: <https://www.khaleejtimes.com/technology/investments-in-ict-to-drive-digital-economy>

<sup>32</sup> J. aus dem Moore, V. Chandran, J. Schubert “The Future of Jobs in the Middle East”, 16 January, 2018, World Government Summit in Collaboration with McKinsey & Company, Available at: <https://www.mckinsey.com/-/media/mckinsey/featured%20insights/middle%20east%20and%20africa/are%20middle%20east%20workers%20ready%20for%20the%20impact%20of%20automation/the-future-of-jobs-in-the-middle-east.ashx>

<sup>33</sup> S. Smith, ‘Digital Transformation in the GCC’, 2020, EGIC, Available at: <https://www.egic.info/digital-transformation-in-the-gcc>

<sup>34</sup> Interview Shaikha Al-Hashem, Academic and researcher in Kuwait, 11 January 2021

### Reducing the number of migrants

Among certain political sectors in the Gulf the pandemic is seen as providing justification for calls to reduce the number of migrant workers in the country. Some countries started deporting migrant workers, and especially irregular migrants, early on in the pandemic.

Such calls are made across the region, in the media and in some cases reaching Parliament. In Kuwait, the Parliament is considering a bill calling for the reduction of the migrant population to 30% from the current estimated 70%. The bill also proposes to introduce a quota system for specific nationalities, as well as to make anyone over the age of 60 without a secondary education ineligible for residency<sup>35</sup>. Bahrain's public discussions have also seen calls for reducing the number of migrants in the country, as a way to protect the Bahraini workforce accompanied with strong anti-immigrant statements.<sup>36</sup>

COVID-19 had the potential to increase xenophobia and be used in an opportunistic way by anti-migrant politicians and sentiments could intensify if nationals continue to feel insecure with regard to the economic conditions and the negative effects of the expected economic recession in the Gulf region.

<sup>35</sup> S. Al-Hashem, G. Martin, 'The Elephant in the Room: Kuwait's Labor Crisis', (5 November, 2020) Gulf International Forum, Available at: <https://gulrif.org/the-elephant-in-the-room-kuwaits-labor-crisis/>

<sup>36</sup> 'Bahrain's parliament passes a bill to restrict labour mobility for migrants' (January 15, 2021) Migrant-Rights. Org, Available at: <https://www.migrant-rights.org/2021/01/bahrains-parliament-passes-a-bill-to-restrict-labour-mobility-for-migrants/>

## COVID-19 – THE GREAT RESET

The compounding health, economic and social effects of the COVID-19 pandemic are catalysing a process of transformation in labour mobility frameworks globally, as well as in the Gulf. And while recruitment concerns are apparent among policy makers, employers, and migrants in both sending and receiving countries, the policies that will set the direction are not yet clear. Despite the challenges, the temporary halt in migrant flows and the measures to include migrant workers in the response to the pandemic present an opportunity to reform labour mobility frameworks in the Gulf region and in the Abu Dhabi Dialogue corridors. It presents an opportunity to enhance measures and systems that could lead to further improved safe, legal, and orderly migration in the ADD corridors.

It can provide the basis for adapting labour mobility policy frameworks to enhance labour mobility within countries and indeed the region, as well as address existing problems such as visa trading and irregular migration.

The identified gap in social protection for migrant workers in the region, as well as the fact the migrant workers were at the frontline of the response, along with locals, provides a basis for developing an inclusive social protection system that goes beyond temporary emergency measures. The good practice from expanding access to healthcare which was provided during COVID-19, along with free and equitable vaccination in these countries in the Gulf, sets a good precedent to further extend the provision of healthcare beyond COVID-19. Provision of adequate housing in line with COVID-19 requirements for social distancing and sanitation can also be used as a basis to raise the standards in migrant accommodation in general across the Gulf region. Other forms of contributory and non-contributory social protection measures can be explored as well. These provisions will become increasingly important in the global competition for talent as well.

Withholding of wages, including both payments of salaries and end of service agreements, has seen a considerable rise during the pandemic. This has left workers from some of the poorest countries without an income and without the ability to provide for their families. To help resolve this situation governments need to ensure migrant workers receive their due wages and enhance existing legal complaints systems for workers' grievances and complaints to respond to the increase in wage-related complaints. In addition, there are proposals to develop a wage compensation fund, aimed at enacting rules and regulations related to the recovery of payments from employers or when employers have gone bankrupt, which also cover cases when workers have left the country of destination.

During the pandemic migrants also experienced rising xenophobia across the region. Particularly many Asian migrants, both low and high-skilled, cited xenophobia and the negative public discourse blaming migrants for the pandemic as one of the reasons to leave the Gulf. Although governments in the region have taken xenophobia seriously, providing information in different languages, and providing medical care for all residents, such public anti-immigrant sentiments may be used in an opportunistic way politically as well. There is a sentiment among some parts of the population that extending healthcare to migrants and introducing flexibility in the labour regime was the right thing to do in the short term, but they shouldn't have to do this in the long run<sup>37</sup>. This framing may be used to justify calls for reducing the number of migrants and legal channels for labour migration to the region. This may in the future affect the ability of Gulf countries to attract highly skilled migrants, as competition for skills increases globally. For the low-skilled workers,

<sup>37</sup> Interview with Ausamah Alabsi, migration expert, former CEO of LMRA in Bahrain, 13 January 2021

this kind of discourse may have a negative effect as costs of recruitment rise, protection is reduced and the possibility for exploitation increases.

In summary, the pandemic has presented many challenges to governments and migrant workers across the globe and in the ADD corridors in particular. However, the temporary suspension of the flow of migrants in these corridors also presents an opportunity to re-design the labour mobility frameworks and to make them more responsive and geared towards the strategic development Visions and Agendas that all Gulf countries have developed.

It is too early to draw out a definite trend for the emerging labour mobility frameworks post-COVID-19, but it is clear that there will be attempts to reform the existing system that will be subject to the political developments in the region, as much as to health and economic concerns. The pandemic presents an opportunity to enhance the protection of migrants, both low and highly skilled and improve labour market mobility, legal labour migration channels, ethical recruitment, skills partnerships and provision of health and social protection. By bringing together countries of origin and destination in the ADD corridors in the Gulf region and Asia, the Abu Dhabi Dialogue is uniquely positioned to enable safe, orderly, and regular labour migration.

## RECOMMENDATIONS

### **Enhance internal labour mobility in countries of destination**

Enhancing internal labour mobility has an array of economic benefits which set the foundation for more sustainable economic development. This includes stimulating skills development, diversification, job creation and supporting nationalization efforts. It can also help address existing problems such as visa trading and irregular migration. To this end, support measures that enhance mobility in the labour market – self-employment, employment by multiple employers, enhance ability to change employers and sectors of growth as the economy reopens. These measures should be gender responsive as well and take into account the situation of women migrant workers and also address women migrant workers, including domestic workers.

### **Extend social protection to migrant workers**

In an increasing competition for skills and talent globally, countries of destination may want to consider the emerging nexus between the future of work and social protection and the leverage that enhancing social protection provides in attracting migrant workers, and particularly skilled workers. Furthermore, building on the good practices developed during the COVID-19 response and the need to ensure that all people present in a society need to be safe, ADD Member States explore how to extend social protection measures to all migrant workers including those in an irregular situation. This includes expanding access to healthcare beyond COVID-19; extending provision of adequate housing in line with COVID-19 requirements for social distancing and sanitation beyond the pandemic response to raise the standards in migrant accommodation in general across the Gulf region. Different forms of contributory and non-contributory social protection measures can be explored to ensure migrant workers (also those in irregular situations) can receive support in the future and/or be supported in making the transition from informal to formal employment and thus be capacitated to contribute to social protection systems; Migrant Welfare Funds are another tool familiar in the ADD corridors and can be further developed.



### **Enhance the provision of comprehensive information to migrant workers and women migrant workers**

Building on the existing Comprehensive Information and Orientation Programme (CIOP) developed in the framework of the ADD, enhance the provision of information at key stages of the migration journey: before decisions to migrate are made, pre-departure, post-arrival and pre-return to ensure a productive and successful migration experience. In addition, promote a gender focused approach which will include content tailored to the sectors women migrants work in, along migration corridors in the ADD.

### **Develop Skills Mobility Partnerships (SMPs)**

Explore innovative forms of labour mobility for skilled migration such as Skills Mobility Partnerships (SMPs). They can be beneficial for countries of destination who have a pool of qualified and certified professionals to recruit from and can help meet skill shortages and labour market needs and can also contribute to country of origins' development through a better trained workforce. Migrants benefit from training opportunity and career options both in countries of origin and destination. By design, SMPs consider participant's previously earned degrees, qualifications and competences at all skill levels. Through cost sharing and joint investments in educational reform between stakeholders, the expenses for training local workers and future migrants are kept low. Relevant bi-lateral and multilateral Memorandums of Understanding and Bilateral Labour Agreements can be concluded between countries of origin and destination that are based on and facilitate such skills mobility partnerships. These can be concluded both between governments as well as between the private sector and government.

### **Explore upskilling partnerships in countries of destination**

As part of the Skilled Mobility Partnerships and building on the local knowledge and skills of migrants already in countries of destination, as well as maximizing on the investments in health already made and creating a shock-proof model for future pandemics and closure of labour mobility corridors, ADD MS can explore partnerships for upskilling in countries of destination. These can be developed for specific sectors that are facing shortage of workers as the economy reopens – i.e., construction, hospitality, healthcare. Countries of origin and destination can share costs to provide targeted trainings for upskilling on migrants already in countries of destination who can quickly take on new jobs required by the labour market.

## UPSKILLING FOR THE FUTURE

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## EXECUTIVE SUMMARY

Migrant workers are an important part of global workforces. International migration is an effective instrument to meet skill demand in sectors or occupations where domestic skill supply is insufficient. Its effectiveness can be enhanced through properly designed and executed skilling and upskilling initiatives in countries of origin and of destination. This paper discusses the skilling and upskilling imperative in the context of the Abu Dhabi Dialogue (ADD) countries. It highlights examples of upskilling strategies and contours of skilling ecosystems to derive insights on how policy makers, program implementors and organizations can cater to reskilling and upskilling requirements for migrant workforces.

Various aspects need to be strengthened to achieve this goal. These include, among others, systems that provide updated information on the skills in demand, opportunities provided in the destination country to skilled migrant workers to acquire incremental / specialized skills, enhanced role of public-private partnerships and other collaborative models. Skilling programs in many countries are based on qualification frameworks that provide a basis for assessing and upgrading skills. Such frameworks often emphasize objectives such as relevance and flexibility, recognition of prior learning and enhancing lifelong learning. Well-informed and adaptive standards are needed for skilling and upskilling initiatives to align with industry demand.

The paper highlights that as ADD member countries move up the technology ladder, they increasingly seek workers with specialized skills. Alignment of standards and accreditation mechanisms for certifications across countries can help countries of origin prepare the workforce in line with the future requirements of destination countries. Critical aspects that stakeholders need to focus on for upskilling for the future include developing appropriate delivery mechanisms, increasing offtake, enhancing private sector participation, generating wider reach for upskilling initiatives, developing focus on workplace learning, and increasing emphasis on future skills. Further, a dynamic skilling and upskilling ecosystem must meet the diverse and context-specific learning needs of people at all education and digital literacy levels, and in different age groups. Member States also need to focus on developing appropriate skill mobility partnerships for mapping, harmonization, and mutual recognition of skills along with introducing adequate interventions for promoting upskilling through regulatory and financial incentives.

## ABU DHABI DIALOGUE RESEARCH AGENDA : UPSKILLING FOR THE FUTURE

*UNDER THE OVERALL THEME: ANTICIPATED CHANGES IN THE EMPLOYMENT LANDSCAPE IN THE GCC AND THEIR IMPACT ON LABOUR SUPPLY AND DEMAND IN ADD CORRIDORS*

### **ABSTRACT:**

Migrant workers are an important part of global workforces. International migration is an effective instrument to meet skill demand in sectors or occupations where domestic skill supply is insufficient. Its effectiveness can be enhanced through properly designed and executed skilling and upskilling initiatives in countries of origin and of destination. This paper discusses the skilling and upskilling imperative in the context of the Abu Dhabi Dialogue (ADD) countries. It highlights examples of upskilling strategies and contours of skilling ecosystems to derive insights on how policy makers, program implementors and organizations can cater to reskilling and upskilling requirements for migrant workforces.

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## A. Introduction

Several countries are seeing rising median age of their population. Ageing population impacts the size of the working age population. Consequently, labour shortages may emerge in specific regions, sectors or occupations, at different skill levels. Additionally, there are occupations where labour demand itself is expected to increase because of an ageing population, such as healthcare or domestic services. Faced with labour shortages, governments across the world are responding by encouraging adoption of new technologies and taking measures to raise workforce participation. Further, usage of new age technologies and automation is rapidly evolving the landscape for jobs and skills. Many of these measures would show an effect only in the long term. In the short term, countries may not be able to rely on them alone to bridge gaps in workforce requirements. One of the tested solutions is to attract economic migrants from other countries in sectors and occupations experiencing labour shortages.

Given the important role of migrants in global workforces, countries must focus on skilling potential migrants to prepare them for economic opportunities in other countries, as well as on reskilling and upskilling existing migrant workforces. This paper discusses the reskilling and upskilling imperative in the context of the Abu Dhabi Dialogue (ADD) countries. It highlights some examples of upskilling strategies and broad contours of skilling ecosystems in different countries to derive insights on how policy makers, program implementors and organizations can create future ready workforces and cater to reskilling and upskilling needs for migrant workforces.

## B. Migration and Skills

Skilled worker migration plays a critical role in many countries to meet skill requirements. In 2017, there were 164 million migrant workers worldwide, accounting for 4.7% of all workers. The Arab states have the largest share of migrant workers as a proportion of all workers (40.8%), although their share of total migrant workers is lower (13.9%, compared to 23% for Northern America and 23.9% for Northern, Southern and Western Europe). Migrants constitute 52% of the population in the GCC countries. In the UAE, Qatar, Kuwait and Bahrain, the population of migrants in fact outnumbers that of natives<sup>i</sup>. The migrant workforce is seen as critical to sustain economic growth and support large infrastructure investment and economic diversification plans in the GCC Countries.

Malaysia, another ADD Country of Destination (COD) member, has a lower share of migrants in its total population (8.4%) compared to the GCC countries. However, migrants are expected to continue to remain economically important given its population trends – new entrants in the age group 15-24 years would drop from 19.7% in 2015 to 14.8% in 2025 and population above 50 years would increase from 18.2% in 2015 to 22.1% in 2025.

People migrate for various reasons such as better livelihood and living standards. Migration brings multiple benefits to both the country of origin (COO) and the destination country. Migrants add to a country's productivity and enable global transfer of local know-how and technology. At the same time, they provide remittances to their home country. Over the last three decades, remittance flows to developing countries have risen steadily from USD 126 billion (1990) to USD 528 billion (2018)<sup>ii</sup>.

## Identifying labour shortage sectors and occupations in countries of destination

Recent OECD estimates suggests that 14% of all jobs across OECD countries have a high risk of automation. 32% of jobs may experience significant changes in how they are carried out<sup>iii</sup>. In this scenario, digital skills are among the most sought-after skills today. A 2017 PwC CEOs Survey finds that 80% of the CEOs surveyed are concerned with the availability of digital skills in their workforce<sup>iv</sup>. In demand are also the skills needed to work with new technologies and greater automation in processes and systems. According to the OECD, 30% of current jobs in member states are at stake due to automation. An OECD study highlights that workers with at most secondary educational attainment and those with below median income per capita levels are disproportionately likely to be most impacted by technology-driven disruptions. These studies provide us an indication of expected changes, which are relevant for the ADD Members in formulating strategies for their workforces.

While automation may reduce the long-term requirement for low skilled migrant workers, there is a transition period in which organizations adopt new technologies, gear their workforces to use them, make changes in their way of operation, and perhaps seek to expand business as technology enables greater efficiencies. In such a scenario, upgrading skills of workers and imparting new skills to them may be necessary to drive performance in their current job. Further, there is some evidence that automation is pushing native-born workers into more complex roles as occupations most likely to be automated seem less attractive to them. In Europe, more than 40% of foreign-born workers are in occupations dominated by routine tasks<sup>v</sup>. Migrants in such occupations require support to reskill and upskill to cope with changing needs. Here, migrants who in many cases are at a disadvantage due to language issues, less than complete assimilation in the country's culture and norms, and lack of social networks.

International migration is often used as an instrument to meet skill demand in sectors or occupations where domestic skill supply is insufficient. However, its effective use requires a system for providing continuous feedback on evolving skill demand. An example is the skills anticipation system in Denmark, which provides labour market trends and skills demand for 850 occupations. Activities include forecasting through statistical models, sectoral studies and employer surveys. The output feeds into occupational skills mapping and curricula development. In addition to new labour force entrants, jobseekers, training providers and employers, the system caters to people in employment who are looking at reskilling or upskilling. Another example is that of a real-time skills demand information system in the EU that consolidates information from disparate sources, launched by CEDEFOP (the European Centre for Development of Vocational Training) in 2017<sup>vi</sup>.

Skill gap studies can provide useful pointers about skill requirements and therefore where reskilling and upskilling programs are needed. For instance, in a study conducted by NSDC, it was seen that while Saudi Arabia's economy continues to offer avenues for low skilled migrant employment in extractive industries, it is diversifying into other sectors such as agriculture and personal care services, and opportunities are also increasing for technical and high skilled professionals in IT and manufacturing. The study also found that in the UAE, where migrants form 82% of total population, demand is expected to grow in sectors like financial services, tourism and hospitality, and healthcare. Further, the ongoing digital transformation of the UAE's oil and gas sector suggests demand for skills in emerging technologies such as cloud, mobility, robotics, and big data analytics. Qatar is another GCC country heavily dependent on migrant workers (90% of its labour force comprises non-nationals). Here, emerging areas include downstream industries in hydrocarbon sector, healthcare infrastructure and education.

### C. Stakeholders in Upskilling for the Future

Skilling ecosystems in countries with large migrant workforces must therefore strengthen their systems for upskilling not only their domestic workforces, but also migrant ones. With the changing nature of work, and with job roles being redefined or becoming redundant and new ones emerging, there are implications at three levels – individual, industry / practitioners, policy makers / program implementors. Individual decision-making is about learning new skills (reskill) or upgrading skills (upskill) to prepare for new or better work opportunities and to facilitate career progression. For migrant workforces, opportunities and support provided by governments of the destination country and by their employing organizations are particularly critical for them to sustain their livelihoods.

For organizations, it is about adopting upskilling strategies for their current workforces – which could include both domestic and migrant workers – to ensure a ready pool of adequately skilled individuals. For policymakers and program / project implementation agencies, the focus is on developing policies, programs, and strategies to reskill and upskill the workforce, and the scope for public-private partnership and industry involvement therein.

When it comes to migrant workforces specifically, the approach to upskilling is likely to have commonalities with that for domestic workforces, with shared aims when it comes to preparing workforces for new job requirements, imparting future skills, and equipping them to work with new technologies. At the same time, there will be elements specific to migrant workforces, when it comes to aspects such as recognizing new skills acquisition to strengthen employability of migrant workers when they return to their country of origin or providing them social protection especially in transition periods between jobs.

### D. Operationalizing Skilling Ecosystems for Creating an Employable Labour Force

Underlying skilling ecosystems across the world is a nuanced understanding of what skills are and therefore what are the most appropriate frameworks that be used to build a skilled and employable workforce and provide them opportunities to reskill and upskill in line with market demand.

According to ILO (2017)<sup>viii</sup>, there are three types of skills: soft skills (ICT, problem-solving, communication, decision-making skills); basic (literacy and numeracy); job-specific / technical (specialist knowledge, knowledge of products or services produced and materials worked with, ability of operating technical tools). India's National Sample Survey Organization (NSSO) specifies that: 'Any marketable expertise, however acquired, irrespective of whether marketed or not, and whether the intention is to market it or not, is considered as skill.'

The ILO also describes skill as the ability to carry out a given job<sup>ix</sup>. It has two dimensions: skill level (which depends on the complexity and range of the tasks) and skill specialization (field of knowledge, tools/machinery/materials used, goods & services produced). Operationally, the ILO uses educational attainment to define skill level, which only partially reflect that skills can also be acquired through informal learning and experience and may not be adequate proxies. People in specialized occupations (for example plumber, automotive mechanic) may be highly skilled even if they do not have a formal educational qualification. At the other end, an aeronautical engineer has both high skill and high level of formal education. Years of education or level of formal education may be an especially imperfect proxy in an economy such as India's, where there is a vast segment of informal workers in India, many of whom possess skills that have not been formally recognized.



A central theme that emerges from these definitions is that skills are related to ‘competence’ and the ability to do a job well, may be formally or informally acquired, and have a market value. Skilling and upskilling programs are, in many countries, therefore based on skill qualification frameworks that provide a basis for assessing and upgrading skills. Such frameworks, include an approach to standard-setting and development of course curricula and content, emphasize objectives such as relevance and flexibility of training programs, assessment and certification processes and norms, recognition of prior learning (RPL), enhancing lifelong learning, and developing quality assurance systems. Well-informed, responsive and adaptive standards and competency-based frameworks underlie not only first-time skilling of those who are in the labour force and are seeking employment, but also of the existing workforce, aligned to industry demand.

Reskilling and upskilling for enhancing workforce readiness for the future of work are even more crucial in the context of digitalization and emergence of new technologies such as Robotics and Artificial Intelligence (AI), which can potentially allow workers to do more of productive, less routine tasks. Technology is also expected to change many existing jobs and the related requirement of the competencies of the workers.

While reskilling is sometimes taken to be associated with workers who have lost jobs, that is not the only interpretation. It is also the acquisition of new skills that enable job market mobility and transition into different professions. Reskilling may also be required to transition to a different position or new role within the organization – could be for a career growth opportunity, or because new technologies adopted by the firm has made current role redundant and a new role has emerged. Upskilling, meanwhile, usually connotes the intent to expand capability and therefore employability of a worker, and to improve their competency portfolio, including technical, soft and digital skills. Upskilled employees can offer more to their employing organization. Upskilling also implies re-qualification, which is an important tool in the transition to jobs that are less likely to be automated.

### **Creating Competency Based Skilling Framework**

In India, the competency-based National Skills Qualifications Framework (NSQF) has been developed and is operationalized through the creation of National Occupation Standards (NOS) and Qualification Packs (QP). A NOS defines measurable performance outcomes required from an individual engaged in a task. A QP corresponding to a job role is defined as a combination of the relevant NOSs. NOSs and QPs are formulated by Sector Skill Councils (SSCs), which drive industry participation in the process through expert committees, stakeholder workshops and validations from organizations. Processes have thus been established for curating occupational standards for developing future skills in line with emerging job market needs. Importantly, focus on future skills is maintained through regular updates and revisions of QPs. Obsolete and redundant QPs are phased out and new ones are created in line with industry requirements. New age skills are integrated into standards, and new standards introduced for creating future ready workforces. For instance, for developing future skills for emerging technologies, such as Cyber Security, AI, Big Data Analytics (BDA), Cloud Computing, Block Chain, Robotic Process Automation (RPA) and IoT, over 50 new age skills for Industry 4.0 have been introduced. The IT-ITeS SSC supported by NSDC, developed the ‘FutureSkills’ platform, which aggregates training programs from premium providers to cater to the skilling, re-skilling, and upskilling needs of employees.

## **Institutionalizing mechanisms to upskill migrant labour with specialized skills / incremental skill requirements in destination countries**

A critical aspect is developing appropriate delivery mechanisms for upskilling programs for increasing offtake and generating wider reach. While instructor-led training in physical classrooms remains a mainstay of skilling programs, increasingly new methods of delivery are being adopted. In India's flagship skilling scheme, blended learning technology has been leveraged on a pilot basis. e-Skill India, NSDC's digital skilling platform, drives learner-centricity by aggregating B2C e-learning portals operating in the skilling ecosystem and thus providing opportunities to skill seekers to choose an e-learning course from a comprehensive catalogue. Moreover, it allows targeting of segments that may not wish to go for full-time vocational programs but are aiming to acquire new and additional skills while being in work. It also caters to segments that have low educational attainment levels and whose low capacity to pay does not allow them to go for more expensive training programs. Such digital platforms see offtake also because they allow scheduling flexibility for learners in self-paced programs.

Another key learning from various skilling ecosystems is that TVET institutions must institutionalize linkages with industries, in setting standards and designing curricula and course content, and in ensuring high quality trainers. In India, for instance, there is focus on professional development of trainers covering domain and platform skills, with training of trainers being an industry-driven process.

### **E. Private Sector Participation in Reskilling and Upskilling for Future Ready Workforces**

There is also scope for increasing emphasis on future skills. In France, it was observed in various surveys that 42% of the training taken focused on, as the main objective, developing flexibility, the ability to multi-task and/or building other soft skills competencies. Majority of effective training investment was aimed at ensuring that the employee is more comfortable in their current job (49%) or to comply with new regulatory issues (31%). Only 15% focused on protecting against job obsolescence or on learning skills required to obtain new employment.

Firms tend to underinvest (from a social point of view) in developing skills of their employees as the latter may leave after acquiring skills, thereby benefiting other firms. Recognition of Prior Learning (RPL) interventions, which assess and formally certify informally acquired skills, also see underinvestment by private entities for similar reasons. For instance, in Africa, informal sector firms offering apprenticeships were often reluctant to align with formal systems as a skills certificate may raise an employee's bargaining power, who can then move to another employer<sup>xi</sup>. It is relevant to note here that an RPL intervention can also include a component of upskilling, wherein existing competencies are assessed and upgraded to a prescribed level.



### **Challenges faced by enterprises in implementing upskilling programs...**

Organizational focus on reskilling and upskilling employees is increasing – 67% of CEOs in the PwC survey acknowledge their responsibility to reskill and upskill their workforce<sup>xii</sup>. Getting employees to attend trainings is challenging to as they are more demanding and looks for varied options of learning. In the survey of L&D professionals in India, 29% said employees do not attend training programs<sup>xiii</sup>. One way to motivate employees to reskill or upskill is for companies to include training in work objectives, or link incentives such as higher pay to competency acquisition. Organizational focus on making structured programs for skills acquisition available can generate buy in. Large organizations pay attention to this, while SMEs do not always have the capacity to offer workers training time and resources.

Further, businesses can find it challenging to develop a clear vision of future job requirements. Anticipating future skills and new ways of working is especially difficult for Small and Medium Enterprises (SMEs), for whom even articulation of current skill requirements can be a challenge. Also, SMEs are constrained in their access to training due to their small size and resource limitations. Effectively engaging SMEs in reskilling programs is critical for ensuring the success of broad-based reskilling and upskilling.

A dynamic skilling and upskilling ecosystem should meet the diverse and context-specific learning needs of people at all education and digital literacy levels, and in different age groups. Recent research estimating the impact of automation on labour markets across OECD countries highlights that workers with at most secondary educational attainment and those with below median income per capita levels are disproportionately likely to be most impacted by technology-driven disruptions.

### **...which are being met by new solutions**

Encouragingly, with the advent of online learning and digital training platforms, organizations can provide their workforces with the flexibility to choose learning modes and schedules. For instance, there are coding schools in countries such as Japan, the US, France that prepare people, who have little or no previous technical knowledge, within as short durations as three months to be hired. The right selection criteria (including aspects such as motivation and cognitive skills), well-structured programs, frequent tests and remediation of issues, real case projects are some of the elements essential to success. One such example of a coding school is that run by Progate in Japan<sup>xiv</sup>, which has a programme comprised of AI, robotics and customer interface.

### **Increasing effectiveness of training programs**

On-the-job training and upskilling programs can be made more effective if they are targeted right. Understanding the demography of migrants is essential for effective targeting of reskilling and upskilling programs. Young people dominate international migrant flows – around 70% are younger than 30 years of age<sup>xv</sup>. In the G20 countries, nearly 30% of the foreign-born population had a tertiary level of education in 2015-16, though this share varied across origin countries. Low shares of immigrants from Mexico (10%), Bangladesh (10%), Morocco (17%) and Kazakhstan (19%) had tertiary education. In contrast, more than half of immigrants from India had a high level of education, and high shares of immigrants from the UK (49%), China (48%), the Russian Federation (43%) and Germany (42%) had tertiary education.

The importance of incorporating soft skills – such as problem-solving, innovation, interpersonal and collaborative skills

– in upskilling programs cannot be overstated. Several studies<sup>xvi</sup> link adaptable technology-based capability, soft skills development and complex problem-solving, with employability. Workforces need to acquire the soft skills essential to work in a professional environment, develop the ability to use new technologies and adapt to new ways of working – and upskilling programs need to cater to that. Yet, the 2018 OECD Report on Automation indicates that only 31% of at-risk employees (job loss through automation) have received professional training in the past 12 months<sup>xvii</sup>. Data from the OECD countries reveals that low-skilled workers and those at the highest risk of losing their jobs to automation are less likely to participate in and receive fewer hours of on-the-job training over a 12-month period than workers in non-automatable positions.

In many cases, the requirement for highly specialized skills means that upskilling programs either do not require or cannot achieve scale. Despite small numbers, there are lessons to be learnt from how collaborative models can be used to quickly create the required skills and positive outcomes can be achieved when government and industry cooperate to build well-designed programs. In Luxembourg, a pilot reskilling and upskilling project, known as the Luxembourg Skills Bridge, was undertaken across multiple sectors, such as manufacturing, financial services, construction, the craft industry and professional services. This initiative is available to any company facing a major shift in their work organisation due to technological and digital investments. The programme absorbs up to a specified proportion of training costs and provides an additional salary compensation during the training period. The initiative was designed around limiting the administrative burden of programme management for participating companies and reinforces company workforce planning practices<sup>xviii</sup>.

## F. ROLE OF GOVERNMENTS AS AN ENABLER

### Developing effective Public Private Partnerships

Upskilling programs, if implemented by governments or public sector organizations in partnership with private enterprises, or by the enterprises themselves, can help ensure that skills reflect current or future business requirements. Public-private partnerships (PPPs) are therefore prevalent in skill development and have been found to yield positive outcomes. For instance, a third-party evaluation of a publicly funded short-term training program in India finds that the intervention, which entails industry/private sector participation at various steps (such as occupational standards development, curriculum design, training provision, training of trainers, and placements) yields benefits in terms of employment and income. The study also finds positive impact of RPL in terms of making certificate-holders more prepared for current employment, improving income earning capability, and better labour market mobility.

### Exploring strategies such as mapping and harmonization of skilling standards across countries

As ADD Member countries move up the technology ladder, they shall increasingly seek workers with specialized skills. Without alignment of standards and accreditation mechanisms for certifications, however, skilled workers can lose out on growth opportunities and wage premiums. To prepare the workforce in line with the future requirements of the CODs, member states can focus on mapping and harmonization of skilling standards across the countries. A pilot project was undertaken for the mapping and harmonization of India's skill development programmes with specific job requirements in the UAE<sup>xx</sup>. Currently, about 70% of the 3.42 million Indians in the UAE can be categorized as blue-collar workers. Some have received formal vocational training, but often start as entry-level employees and do not get a wage premium. Therefore, an effort is being made to create a skills harmonization and accreditation programme to

facilitate alignment of standards between the two countries, The UAE has started to notify the skills that will be required for working in different vocations through the Abu Dhabi Quality & Conformity Council (ADQCC). India has started working on this portfolio in order to keep pace with upskilling requirements in the UAE and create a skill mapping and harmonization template. This will help to align UAE and Indian occupational qualifications, and facilitate upskilling and certification, and create upskilling infrastructure in the UAE. A similar initiative has been undertaken between India and Kingdom of Saudi Arabia for launching the Skills Verification Program (SVP) in India for prospective migrants. Under the program, skills of the migrant will be verified at dedicated assessment centres on identified benchmarked qualifications, leading to mutual skill certification.

Skills can depreciate with time because of changes in workplaces or new technologies. Structuring upskilling programs across the migration corridors, requires recognizing and tracking available skills based on standardized frameworks. For instance, the European Qualification Framework streamlines the recognition of formal and non-formal qualifications in 39 European countries, improving labour market mobility and facilitating access to a larger pool of comparable skills<sup>xxi</sup>. The ILO has suggested a Regional Model Competency Standards (RMCS) for recognizing the skills of migrant workers<sup>xxii</sup>. This includes ‘lifestyle’ pre-departure training; training in language, culture (including work culture), and occupational safety and health. The RMCS define essential skills required to work in an industry or sector, providing a flexible framework that enterprises in different countries can use. RMCS have been implemented in countries such as the Philippines and Sri Lanka. Upskilling programs in the destination country that provide for formal skills recognition are suggested as being useful for migrant workers who have acquired additional skillsets when they return to their home country.

### **Building and sustaining motivation for reskilling and upskilling**

Member states need to play a proactive role to bring a focus towards upskilling of the workforce through adequate interventions at both regulatory and financial levels. One of the drivers to promote private sector investment in upskilling can be through financial incentives by CODs tax incentives or reduction of visa/work permit costs. In few countries, the same has been found to be beneficial. For instance, in Austria, 120% deduction is allowed from taxable profits for training expenses for employees<sup>xxiii</sup>. The Netherlands offers an incentive to enterprises to train employees for a better position in the business – this takes the form of a tax credit, where salary tax is partly deducted from overall tax payments. In Austria, companies with insufficient profits can claim a tax credit of 6% of training expenses (deducted from tax liability) instead of the extra tax allowance mentioned above. Though, one of the issues with tax incentives is that they may encourage firms to train higher skilled, higher paid workers, where the expected economic return is higher. In Ireland, employer organizations have therefore recommended an employer’s tax credit focused on lower skilled employees. Similarly, in the US, the Future of Work Initiative has proposed a Worker Training Tax Credit, targeted at smaller businesses and lower paid employees<sup>xxiv</sup>. Modeled on the R&D tax credit, it is estimated that the tax credit would lead businesses to increase training investments by 8.5%.

Other instruments for businesses include payroll taxes dedicated to subsidizing training opportunities and public grants for subsidizing training especially for smaller firms. In addition to supporting workplace learning, personalized instruments can be used such as publicly subsidized vouchers and preferential loans. To increase resource availability, some countries, such as Singapore, have set up lifelong learning endowment funds. Singapore uses the interest from

this fund to support initiatives for skill acquisition. A dual approach is used to both subsidize the provision of trainings on the supply side, and to provide credit for individual training accounts for learners on the demand side.

Providing subsidized training opportunities for workforces does not always suffice to foster participation. Motivation-related issues and concerns about availability of information about employment opportunities need to be addressed. In France, the Manpower Group is helping redundant workers in career transitions by developing their skills for in-demand sectors like IT and call centres, through four month-long programmes comprising of skills assessments, training, and access to an online learning management system in hard and soft skills<sup>xxv</sup>. Thereafter, the 'Bridge to Work' program works as a matching platform for deploying unemployed people to fill job vacancies. The program thus links skills acquisition and employment opportunities, while addressing issues of information availability.

## CONCLUSION

To create a holistic framework for Upskilling for the Future different stakeholders, such as Governments of both COD and COO, employers, employees, regulators, and industry associations, all have different and important roles to play. Industry and sector associations are well placed to identify skill needs and training gaps at the sector level and share the anticipated skills and jobs with the relevant stakeholders through a well-defined system. Organizations can offer structured workplace learning programs, encourage employees to participate in sector-specific programs organized by sector association, and support reskilling and upskilling opportunities across supply chains. A dynamic skilling and upskilling ecosystem should meet the diverse and context-specific learning needs of people at all education and digital literacy levels, and in different age groups. Governments can make workforce development efforts coherent by ensuring appropriate regulation, quality assurance systems, frameworks for standards and skill recognition, social safety nets for workers during job transitions as well as implement tax instruments to incentivize workplace upskilling.

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# THE FUTURE OF WORK FOR WOMEN MIGRANT WORKERS IN THE ASIA-GULF STATES ABU DHABI DIALOGUE (ADD) REGIONAL CORRIDOR.

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UN WOMEN





# EXECUTIVE SUMMARY<sup>1</sup>

## THE FUTURE OF WORK FOR WOMEN MIGRANT WORKERS IN THE ASIA-GULF STATES ABU DHABI DIALOGUE (ADD) REGIONAL CORRIDOR

A web of forces is driving economic diversification, automation and newer social and demographic trajectories in GCC states. GCC states have prioritized high technology sectors, the knowledge economy and services; women's increased workforce participation and nationalization of workforces. They have introduced a raft of measures to protect women and men migrant workers, including domestic workers.

Automation<sup>2</sup> is transforming the work fabric in the dual labor markets of GCC states and in other ADD geographies with different outcomes for all workers, including women and men migrant workers. This is mediated by gendered socio-economic labor market differences and inequalities and their interface with other inequalities in ADD countries of origin and destination. Tailored response to the distinct priorities of different categories of women and men migrant workers will help achieve inclusive development.

This paper probes future of work trends for women migrant workers in the Asia-GCC corridor, framed by socio-economic, technological and political drivers of automation and other future of work determinants, including the unfolding COVID-19 crisis. It highlights the ADD's strategic position to enhance migrant women's employability and protection in line with GCC labor market demand. These are the highlights:

- 1.** Available data in GCC dual labor market economies show that GCC country women nationals tend to be in mid to sometimes high level public sector jobs; in services like health and banking; and in business. By contrast, migrant women dominate low-skilled informal jobs and to a smaller extent medium and high-skilled formal jobs in feminized segments of the private sector. These include social/ community/ financial services: domestic work; health and social work, education; financial services and insurance, real estate; hotels and restaurants, whole-sale and retail trade. They work to a much smaller extent in transport and storage, mining, manufacturing and construction and negligibly in electricity, water and gas, and in agriculture and fishing. Many women and men migrants work in sectors hardest hit in the COVID-19 crisis.
- 2.** Key future of work technological trends in GCC states are: increasing , fast-paced digitization in most sectors and jobs, proliferating digital platforms, increasing online businesses and automation.

<sup>1</sup> References and sources are excluded from this summary in the interest of brevity.

<sup>2</sup> Especially marked by the Fourth Industrial Revolution

**3.** Research suggests the following future of work technological impacts on women overall in GCC countries: (a) low or virtually no impact on traditional women-oriented work sectors strong in human interaction, personal care, creative, non-routine tasks and services such as care work (domestic work, healthcare), and education with below average automation potential; (b) displacement risks for a small proportion of women in medium skilled routine repetitive sales and clerical jobs, although tertiary education and skilling can prevent job loss and create new work opportunities; (c) new job opportunities via digitization and through digital platforms that also match employees with jobs. Governments too are leveraging technology to improve labor market matching for migrant men and women workers and extending it to online monitoring of their contracts and work conditions; (d) new women-friendly medium to higher skilled office jobs that replace labor intensive physically heavy tasks in male work sectors (e) net new jobs outside the technology sector and ‘middle jobs’ with strong human-machine interaction across domains.

**4.** Current work trends for women migrant workers are likely to continue in the foreseeable future with some new opportunities requiring upgraded skills. These are in (a) various segments of the care sector where women are already engaged: (i) domestic work with a competitive edge for professional training in domestic work and those with certified skills in home-based care for children including those with special needs, disability/geriatric care, care for the chronically ill; (ii) institution-based healthcare as nurses and lower end support roles, but potential new openings as occupational and physiotherapists, physicians and special needs experts; (b) other social, financial, trade and business services: education, travel/tourism, accommodation/hospitality, retail/trade, financial services/insurance where women are already engaged: (i) the education sector in existing roles as school/university teachers, researchers and lower end support roles, but potential new openings as educators and researchers in professional application-oriented STEM fields and digital technologies and in IT support roles; (ii) the fore-mentioned service sectors outside education in managerial and supervisory roles or financial accounting roles; service, clerical/administrative work; lower-end roles in cleaning, house-keeping, waitressing. Higher and mid-level jobs would require investments in management skills, digital skills to use digital tools and advanced analytics across these sectors (e.g for e-commerce in goods/services, checking stocks/inventory, enhancing performance, customer care etc) and to use new technologies and platforms introduced by the financial sector; (c) manufacturing, mining, and construction e.g in new woman-friendly office-based process management jobs that replace routine, heavy physical labor-intensive operations.

**5.** These work scenarios for migrant women workers in the foreseeable future are based on existing secondary data and key informant interviews. More definitive predictions for the longer-term require more rigorous sector-and-country specific empirical research. Other future of work determinants for women migrant workers include: rate and pace of containment of the spread of COVID-19; economic recovery accompanied by job-led growth; pressure from migrant workers and other migration actors across regions to open up economies; extent to which population growth in GCC states can sustain desired levels of economic development without migrant labor; cost-benefit analysis by employers of competitive wages of migrant women workers and other benefits vs automation,

including nature of incentives provided to private sector; extent to which nationalization policies affect women migrant workers' jobs; demographic trends, gaps in infrastructure, and labor deficits in the care and other sectors of women's work that raise a demand for migrant women; cultural norms, legal measures and support governing women's mobility, interactions, education, employment, sectoral, occupational and skill preferences; levels of investment in education and training; and skills and job readiness of women nationals in GCC and ADD countries of origin to meet new labor market demands. Lastly negotiations over "terms of trade" governed by social, economic and political interests of countries of origin and destination will determine future jobs, protection levels and migration corridors for women migrant workers.

**6.** Drawing on promising practice, the ADD can use its strategic role and position to advance gender-responsive initiatives via dialogue and harmonized action between its countries of origin and destination. Potential areas of engagement could be research, shared thought/analysis and pilot-action on job demand and matching such as job-based skills determination, skills development, assessment and recognition and skills-based mobility backed by more regular migration pathways, fair and ethical recruitment and decent work for women migrant workers.

## I. INTRODUCTION :

A web of forces is driving economic diversification, technological changes marked by the Fourth Industrial Revolution<sup>2</sup> and newer social and demographic trajectories in the Gulf Co-operation Council (GCC) states. Although the contribution of the oil sector to GDP has dropped hugely<sup>3</sup>, it continues to be the greatest determinant of GDP growth for GCC economies (GCC Stat, 2018), while mining and quarrying account for a rising share. Key contributors outside these sectors are finance and real estate; manufacturing; public administration and defense; wholesale, retail trade and hospitality; and construction (GCC Secretariat, 2010). However, the largest sector of employment in GCC states is construction, closely followed by wholesale and retail trade and public administration (ILO, STAT, 2020). Despite impressive economic growth since the 1970s, GCC labor productivity has been slow growing as economic expansion has been based on expansion of the workforce and labor-intensive processes, rather than on the adoption of more productive technologies (International Monetary Fund, 2013).

The changing economic landscapes of GCC countries and labor markets as articulated in their 2030 visions and strategies are consequently marked by (a) high value-added capital-intensive sectors requiring highly skilled labor; (b) private sector augmentation; (c) economic diversification that prioritizes infrastructure, renewable energy, manufacturing, tourism, hospitality, retail trade, finance, robust healthcare and education. These changes seek to save costs, enhance quality, efficiency, scale, brand and image, and generate growth and new jobs. Changes are already afoot in these sectors.<sup>4</sup> GCC countries also prioritize women's increased workforce participation that seeks to match education with job demand; and nationalizing their workforces. All GCC states have introduced a raft of legal and institutional reforms and innovative programs to protect men and women migrant workers, including domestic workers.

The many structural drivers of these changes in GCC countries, include steering away from over-dependence on oil revenues accruing from finite crude oil, cyclical oil crises and competitive pressures of renewable energy. GCC countries have the technology to spur on automation.<sup>5</sup> Amid an economic downturn triggered by the oil crisis and COVID-19-related lockdowns, the pandemic is reinforcing and accelerating automation. It is increasing and institutionalizing new business models of telecommuting and online activity in various sectors, especially where remote working is possible and cost-effective. The pandemic has reinforced prioritizing investments in healthcare. Dynamic economic trajectories are being driven by imperatives to address population growth that increased in GCC countries by 51 percent (by 18 million) or 4.2 percent annually between 2007-2016 (Tayah and Assaf, 2018), a youth demographic growing at 1.4 percent annually in the same period (Ibid) and widespread unemployment among youth<sup>6</sup> and women. The saturated public sector, much preferred for jobs among GCC nationals cannot absorb this. With a demographic skewed towards migrants in some GCC states,<sup>7</sup> there is keenness to develop a self-reliant capacitated national workforce across skill-lines in an efficient private sector. Nationalization policies and strategies that GCC countries are pursuing to achieve this include skilling nationals with a focus on white collar jobs in the private sector and quota-based rules that impose proportional shares of national and migrant workers on private employers (Baldwin-Edwards, 2011 and Hertog, 2014). GCC response to cross-regional and global dynamics, including adoption of the Sustainable Development Goals (SDGs) and 2030 agenda are also shaping their changing socio-economic and future work terrains.

Automation will transform the work fabric – its organization, sites, sectors, occupations, skills and entitlements in the GCC as in other ADD geographies like India, Malaysia and Thailand.<sup>8</sup> This will differently impact various categories of national and migrant women and men workers in the structurally similar dual labor markets of GCC states. Private sector jobs in these states are mostly held by medium-and-low-skilled women and men migrants, typically from poorer Asian, African and Arab countries or by highly skilled employees from countries of the North and South, while nationals of GCC countries dominate public sector employment (Hertog, 2014). The differential outcomes of these processes for various categories of women and men migrant workers will be mediated by gendered socio-economic, labor market differences and inequalities, and other intersecting inequalities<sup>9</sup> in ADD countries of origin and destination, albeit with differences. Tailored responses to the distinct priorities of various categories of women and men migrant worker would achieve inclusive development.

This paper probes likely trajectories for the future of work for women migrant workers in the Asia-GCC regional corridor, framed by socio-economic, technological and political drivers of automation and other future of work determinants in ADD countries of origin and destination, including the unfolding COVID-19 crisis. It explores (a) current labor market trends for women migrant workers; (b) trends and impacts of future of work technologies and other future of work determinants on women migrant worker's jobs in the foreseeable future. Drawing on promising practice, the ADD can leverage dialogue and harmonized action between its countries of origin and destination to enhance women migrant workers' employability and protection aligned with labor market demand in GCC states. Potential areas of engagement include: research, shared thought/analysis and pilot-action on job demand and matching such as job-based skills determination, skills development, assessment, recognition and mobility backed by more regular migration pathways, fair and ethical recruitment and decent work for women migrant workers. The paper is structured along the aforementioned issues it explores, in line with ADD priorities that seek to make migration work better for all, including for women migrant workers. It is based on secondary sources of government, civil society and UN data and analysis, complemented by interviews with experts from these sectors.<sup>10</sup>

<sup>2</sup> Current future of work discussions focus on the Fourth Industrial Revolution whose key trends are automation, artificial intelligence (AI), big data analytics, blockchain technology, the Internet of Things (IoT) and 3D printing (OECD, 2018). Examples of this in the GCC states include advances in 3-D printing in construction <https://www.techradar.com/news/3d-printing-opens-new-horizons-for-construction-sector-in-uae>

<sup>3</sup> The contribution of the oil sector (including the extraction of oil, gas and related services) to GDP dropped from 45.6% in 2013 to 26.4% in 2017 (GCC Stat, 2018).

<sup>4</sup> For example, investments in infrastructure have embraced digitization (aus dem Moore et al, 2018). GCC states are investing heavily in renewable solar and wind energy led by UAE, Saudi Arabia and Kuwait. If GCC renewables goals are met by 2030, the projected 80GW renewable energy capacity could generate an average of 140,000 direct jobs yearly, savings in fuel consumption, CO2 emissions and water withdrawal (Irena, 2016).

<sup>5</sup> A study in six Arab countries Bahrain, Egypt, Kuwait, Oman, Saudi Arabia and the UAE says that 45 percent of existing labor market activities are automatable today based on currently demonstrated technology, with only small variations between them (aus dem Moore et al., 2018).

<sup>6</sup> In 2016 youth unemployment was 10 percent in the UAE, 13.5 percent in Kuwait, and 20 percent in Saudi Arabia <https://data.worldbank.org/indicators/SLUEM.1524.ZS>

<sup>7</sup> Bahrain (51%), Qatar (75%), Kuwait (74%) and the United Arab Emirates (88%). While Oman and Saudi Arabia have relatively smaller shares of the population that are foreign born, this is still much higher than in many European countries or the USA (Pew Research Center, 2016)

<sup>8</sup> The International Federation of Robotics says that growth rates in sales of robots are recorded in ADD countries like India and Thailand. [https://ifr.org/downloads/press2018/Executive\\_Summary\\_WR\\_2018\\_Industrial\\_Robots.pdf](https://ifr.org/downloads/press2018/Executive_Summary_WR_2018_Industrial_Robots.pdf). Manufacturing in Malaysia has a range of new technologies such as machine learning, robotics, 3D printing and internet of things that are revolutionizing production (ILO, 201)

<sup>9</sup> These may be based on age, economic, education, marital, ethnic, nationality and migration status, and others.

<sup>10</sup> This paper has benefitted from the expertise and resources shared by several people. The author gratefully acknowledges: HE Mr. Abdulla Hassan Al Muaini, Mr. Ibrahim Almar, Rasha Assem Saleh, Ann Abunda, Tanjel Ahsan, Shaikha Al-Hashem, Eleanor Burton Al Issa, Ryszard Cholewinski, Sedef Dearing, Elisa Franceschini, Roma Golda, William Gois, Roula Hamati, Tan Tai Hiong, Mega Irena, Dr. Ramani Jayasundere, Avanthi Kalansooriya, Shahbaz Khan, Nanciri Lamsuk, Geoffrey Martin, Denise McGinty, Shabarinath Nair, H.E. Ambassador Nahida Sobhan, Aloysius Rego, Laetitia Wiebel Roberts, Tapati Saha, Menatallah Salama, Dr. S.K. Sasikumar, Dr. Piyasiri Wickramasekara and others



## II. CURRENT LABOR MARKET TRENDS FOR WOMEN MIGRANT WORKERS IN THE ASIA-GCC ADD REGIONAL CORRIDOR

In 2017 women were about 7.7 million (27.6 percent) of 28.1 million migrant workers in the GCC, varying from 16 percent in Oman to 32 percent in Kuwait. This proportion essentially reflects a higher demand for men across skills, especially low-skilled jobs in the male-focused construction, oil and related sectors, with the oil boom of the 1970s. But women's migration to the GCC states rose and stabilized by 665,000 women (9 percent) since 2015 (Ibid). Migrant women's workforce participation rates are more than GCC women nationals (Young, 2016), and more than three times that of women nationals in the Middle East as a whole. This is due to the low workforce participation rates of women nationals in the Middle East<sup>11</sup> and the high demand for domestic and hospitality workers who are often women (UNESCWA and IOM, 2020).

Most women migrant workers in the GCC are from Asia (Bangladesh, Nepal, India, Indonesia, Pakistan, Philippines, and Sri Lanka); Africa (Egypt, Ethiopia, Kenya); other Arab states and other countries globally. While some ADD countries of origin such as Bangladesh, India and Vietnam are among the fastest growing worldwide, with economic growth rates at over 7 percent in 2018, by contrast Afghanistan, Sri Lanka and Thailand saw more muted growth (IMF, 2019). However aggregate growth has occurred alongside structural discrimination and inequality including gender and other inequalities in households, communities, markets, and states, disproportionately impacting women and youth. Insufficient job creation overall with only 22.4 percent of working women being employees in South Asia; notably higher unemployment rates for young women relative to young men; a higher share of women workers in informal employment including in agriculture; lower wages for women relative to men, (ILO, 2019); and socio-cultural discrimination and violence against women largely drive women to migrate in the hope of for higher paid, more decent work and a better life in prosperous GCC states. Moreover, many lower wage ADD countries of origin facilitate migration to GCC states as a development strategy.<sup>12</sup> Gendered protectionist policies of some ADD countries of origin restrict women's out-migration, contributing to them being in irregular and more vulnerable situations (Thimothy and Sasikumar, 2012).

### Economic sectors employing women migrant workers

There is a lack of easy access to comprehensive and comparable labor market data on national and migrant workers in and across GCC states, in terms of economic sectors, occupations, skills and wages disaggregated by sex, age, nationality and other variables. Variations in conceptual and methodological approaches to data collection, classification, analysis and dissemination are partly responsible for this. However available data broadly indicates a dual labor market based on nationality, economic and migration status. Gender-based segmentation is common to national and migrant women's work. Women nationals of GCC states are concentrated in public sector government jobs. In Kuwait for example women make up about 55.5 percent of the national public sector (Young, 2016). GCC women nationals tend to be located in sectors such as health, education and banking services and in business. In the UAE, for example, Emirati women run over 23,000 businesses with a combined worth of about USD 50 billion (Assi and Marcati, 2020). By contrast

<sup>11</sup> Labor force participation rates for women nationals in GCC states are improving. Bahrain and Kuwait have the highest labor force participation of national women among GCC countries (Young, 2016)

<sup>12</sup> ADD countries of origin earned about \$88.8 billion (49.6 percent) of global remittances in 2017 (IMF, 2019)

migrant women are preponderant in low skilled and to some extent medium and high skilled jobs in the informal and formal segments of the private sector. These are woman-oriented sectors marked by women's nurturing, care-giving, house-keeping roles or client-facing sales or service roles or routine, repetitive administrative roles in social, community, financial services, hospitality and trade. More specifically these sectors are domestic work, health/social work and education, financial services/insurance and real estate, hotels and restaurants; and basic, whole-sale and retail trade. Women migrant workers are employed to a much smaller extent than men in transport and storage, mining and quarrying, manufacturing and construction and are almost absent in electricity, water and gas, and agriculture and fishing.

This is borne out by **three tables in Annex 1** on the distribution of migrant workers by sex and economic sector in **Kuwait (2013), Qatar (2012) and Saudi Arabia (2013) (Table 1); Oman (2017) (Table 2) and Saudi Arabia (2018) (Table 3).**

Table 1 shows that out of a total of 9,736,389 migrant workers in Kuwait (2013), Qatar (2012) and Saudi Arabia (2013), women migrant workers number 938,050 (9.6 percent) of all migrant workers.<sup>13</sup> The top three of 16 listed economic sectors in terms of migrant employment are construction, basic, wholesale and retail trade, and households with employed persons that employ a total of 608,3575 male and female migrant workers (62.5 percent) of the total migrant workforce for the 3 countries.<sup>14</sup> Across all three countries women are most concentrated in the sector - households with employed persons where they number 601,841 (64.2 percent) of women's total employment.<sup>15</sup> This is followed by basic, wholesale and retail trade where women number 71,304 (7.6 percent) and health care and social work where they number 68,707 (7.3 percent) of women's total employment respectively.<sup>16</sup> Education, community and social services, financial services and insurance, other economic activities and construction are other sectors employing women.

Table 2 shows that out of a total of 1,795,689 migrant workers in Oman in 2017, women migrant workers number 193,994 (10.8 percent) of all migrant workers.<sup>17</sup> The largest of nine listed economic sectors in terms of migrant employment is engineering employing 821,336 workers, with women comprising only 101 workers - less than 0.1 percent of workers in this sector.<sup>18</sup> Services is the second largest sector employing a total of 468,240 men and women migrant workers.<sup>19</sup> This is the largest employer of women migrant workers at 35.7 percent of the sector.<sup>20</sup> Also women service sector workers number 167,074 (86.1 percent) of women migrant workers.<sup>21</sup> The next largest occupational category for women is scientific technical and human subjects technicians and specialists together numbering 18,973 workers (9.8 percent) of all migrant women employees.

<sup>13</sup> This author's additional calculations based on based on Table 15 in Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and ILO. (2015); \*Saudi Arabia, Central Department of Statistics, [www.cdsi.gov.sa/english](http://www.cdsi.gov.sa/english) [accessed 2014]; \*\*Qatar, Labour Force Survey, 2012; Kuwait, PACI.

<sup>14</sup> Ibid

<sup>15</sup> Ibid

<sup>16</sup> Ibid

<sup>17</sup> This author's additional calculations based on National Centre for Statistics and Information data Sultanate of Oman. (2017). Labour Market.

<sup>18</sup> Ibid

<sup>19</sup> Ibid

<sup>20</sup> Ibid. (It is however unclear from the Table if this includes domestic workers).

<sup>21</sup> Ibid



Table 3 (Annex 1) shows that out of a total of 6,924,995 migrant workers in Saudi Arabia in 2018, women migrant workers number 222,446 (3.2 percent) of all migrant workers. The top six of ten listed economic sectors in terms of migrant employment are construction, trade, manufacturing, financial insurance, real estate and business services, collective and social services and post and telegraphs, employing 97.1 percent of the total migrant workforce.<sup>22</sup> Women are concentrated in two key sectors collective and social services<sup>23</sup> and financial insurance/real estate/business services together numbering 149,220 (67.1) percent of all women migrant workers.<sup>24</sup> 32 percent of women migrant workers are also employed in three more sectors<sup>25</sup>: construction (12 percent), trade (12 percent) and manufacturing (8 percent).<sup>26</sup> Men tend to dominate the construction, trade, manufacturing and business sectors.<sup>27</sup>

Sectors employing women (and men) migrant workers such as accommodation and food services, real estate, business and administrative activities, wholesale/retail trade, manufacturing and care work that were unsuitable for remote working were among the hardest hit in the COVID-19-driven lockdowns that disrupted supply chains. Some of these sectors were at the helm of response to the pandemic, placing women (and men) health and other essential service workers at risk. Already encumbered by prior labor market and social disadvantages women suffered the impact of job and wage losses, abuse, cuts in work hours or workload increases as for example in healthcare or domestic work (D’Cunha, 2021a).

### Migrant women domestic workers in the GCC

In 2016, migrant women domestic workers were 1.65 million (44 percent) of the 3.77 million domestic workers in the GCC, comprising 62 percent, the bulk of migrant women’s employment in this sub-region. Domestic work constitutes equivalent or higher proportions of migrant women’s employment at national/sub-national levels in this sub-region: Oman (62 percent), Bahrain (66 percent), Kuwait (67 percent), Saudi Arabia (77 percent), Abu Dhabi (82 percent) (Tayah and Assaf, 2018). Male domestic work as a percentage of migrant male employment is much smaller than women’s domestic work in sub-national/national contexts (Ibid). These numbers are said to be highly underestimated as domestic workers dominate the informal sector and are about half the migrants in irregular situations in some GCC countries (Shah and Al-Kazi, 2017).

There is also a gender-based division of labor within domestic work. Minor differences between GCC countries apart, migrant women domestic workers are largely ‘nannies’, cooks, cleaners, home-based tutors, home-based nurses and healthcare providers, seamstresses, housekeepers, with skills ranging from low to medium levels. Table 4 (Annex 1) on the distribution of migrant domestic workers by sex and occupation in Saudi Arabia in 2018 shows that migrant domestic workers are employed in nine key occupations.

<sup>22</sup> This author’s additional calculations based on General Authority for Statistics Kingdom of Saudi Arabia data. (2018). Labor Market. Fourth Quarter 2018.

<sup>23</sup> Ibid. (It is however unclear from the Table if this includes domestic workers)

<sup>24</sup> Ibid

<sup>25</sup> Ibid

<sup>26</sup> Ibid

<sup>27</sup> Ibid

<sup>28</sup> These are drivers, cleaners, cooks and food providers, house/building and restroom guards, home-based nurses and health professionals, house farmers, home-based teachers and nannies, housekeepers and home-based tailors (in order of size). (General Authority for Statistics Kingdom of Saudi Arabia data. (2018). Labor Market. Fourth Quarter 2018).

Most are concentrated in two occupations: drivers (53 percent) and cleaners (45.3 percent), comprising 98.6 percent of the total domestic worker occupations.<sup>29</sup> 98.8 percent of women domestic workers are cleaners followed by cooks, home-based teachers/nannies, home-based nurses/health professionals, and home-based tailors.<sup>30</sup> By contrast, 98.5 percent of male domestic workers are drivers (80.4 percent) and cleaners (18.1 percent).<sup>31</sup>

This discussion shows the gendered nature of care work, especially domestic work and its interface with economic, nationality and other inequalities for migrant women workers - concentrated in and contributing to various segments and levels of the care economy but dominating low skilled domestic work. Women's contribution globally to all types of care, including unpaid care, amounts to \$11 trillion globally - 9 percent of global GDP (ILO, 2018). In GCC states as elsewhere, the COVID-19 pandemic has visibilized the critical contribution of women healthcare workers<sup>32</sup> at the frontlines of institution-centered or home-based response, many of whom are migrants (D'Cunha, 2021a). Investments in the care economy would increase women's employment in the sector and enable women's greater participation in the workforce, with multiplier impacts for social and economic development, and realization of the SDGs.

All GCC countries have in the last decade introduced various legal and other measures to protect women and men migrant workers, including domestic workers. Measures for domestic workers have different levels of protection and alignment with provisions of the ILO Domestic Workers Convention, 2011 (No. 189), whose adoption GCC states voted in favor of. More specifically legal protections include covering men and women migrant workers including domestic workers under applicable labor laws/codes; having separate laws, ministerial regulations, decrees and instructions governing domestic work; standard contracts for domestic workers; or legislative enactments governing particular labor rights such as regulations for recruiting agencies, non-discriminatory minimum wages, improved enforcement and accountability. These are very important steps, even though GCC countries still need to ratify Convention 189 on Domestic Workers and address existing gaps in policy and program design and enforcement, as is the case elsewhere worldwide (D'Cunha, 2021c). Also some ADD countries of origin have worked to professionalize domestic work. All of this could together invigorate the discourse and perceptions on the value of domestic work – a value that lies in sustaining human life, households and their working members and enabling women and other household members to engage in paid employment. It thus contributes to productivity, economic growth and human development in GCC countries and countries of origin – also considering migrant domestic workers' economic and social remittances to families and communities. Domestic work is thus foundational to the economy and society. Professionalizing it and providing quality care is intertwined with ensuring decent work conditions for domestic workers (D'Cunha and Chammartin, 2012; Tayah and Assaf, 2018).

<sup>29</sup> This author's additional calculations based on General Authority for Statistics Kingdom of Saudi Arabia data. (2018). Labor Market. Fourth Quarter 2018.

<sup>30</sup> Ibid

<sup>31</sup> Ibid

<sup>32</sup> Women are 70 percent of the global health workforce (WHO, 2019)

### III. TRENDS AND IMPACTS OF FUTURE OF WORK TECHNOLOGIES AND OTHER FUTURE OF WORK DETERMINANTS ON WOMEN MIGRANT WORKERS JOBS IN THE FORESEEABLE FUTURE

#### Overall trends and impacts of future of work technologies on women's jobs in GCC countries

Research in the Arab region including in GCC countries<sup>33</sup> identified the following key future of work technological trends. These are increasing and quick-paced digitization across several sectors and occupations; the growth of digital platforms, on-line entrepreneurship and increased automation (Assi and Marcati, 2020). The following are the overall implications of these trends for women's jobs in GCC countries: (a) Sectors that are strong in human interaction, personal care, creative, non-routine tasks and services such as healthcare, education, arts and entertainment that typically employ large numbers of women have below average automation potential, and are far less vulnerable (aus dem Moore et al., 2018); (b) sectors that are anchored in routine physically heavy labor intensive tasks like manufacturing, transport, warehousing, information technology that typically employ men show over 50 percent automation potential (aus dem Moore et al., 2018 and Assi and Marcati, 2020), as do certain repetitive, routine jobs in finance, business services and trade. A relatively small proportion of women performing repetitive tasks in medium skilled jobs with high automation potential in these sectors, are at risk of displacement. However, women with tertiary education and digital skills are less likely to be impacted than peers who lack this (Assi and Marcati 2020); (c) Digitization and digital platforms will generate new job opportunities for women. Digital platforms provide market sites for contingent work<sup>34</sup> or longer-term work and enhance employability by facilitating employee-matching with jobs (Ibid). Governments are increasingly leveraging technology to improve conventional labor market matching for migrant men and women workers, and extending these functions to online monitoring of their contracts and work conditions (UN Women, 2019); (d) New medium and higher skilled office jobs that replace the decline of physically heavy labor intensive work in male-oriented sectors, will emerge and potentially benefit women (Assi and Marcati 2020); (e) Net new jobs outside the technology sector, and 'middle jobs' with strong human-machine interaction across domains will be created (aus dem Moore et al., 2018). These could also benefit women who have the required skills. The overall future work skill-mix for required workers is skewed towards more social, emotional skills and logic, and less on repetitive motor skills and structured data gathering and processing (Ibid).

Flexible, remote-working online work provides job opportunities for women who are out of the workforce due to socio-cultural, infrastructural and other challenges and enables them to combine work at home with paid employment (Assi and Marcati 2020). Women migrant workers, especially those with digital skills could also potentially capitalize on some of these opportunities. The increasing incidence of telework and the outsourcing of service activities to overseas workers, are examples. This entails worksite changes ranging from home-based work sites to working in offshore public locations. While new technologies generate home-based work opportunities for women, this combined with care work at home and less optimal home-based work environments could increase women's workloads and stress levels and reduce their productivity. Also, some or much of this work, especially on-demand, intermittent work will be informal, thus compromising the decent work agenda for national and migrant women workers.

<sup>33</sup> Research on impact of automation on jobs in general in Bahrain, Egypt, Kuwait, Oman, Saudi Arabia, and the United Arab Emirates (UAE) (aus dem Moore et al., 2018), and its impact on women in Egypt, Jordan, Kuwait, Lebanon, Oman, Saudi Arabia, and the UAE (Assi and Marcati 2020);

<sup>34</sup> Examples include sites for show of talent/sale of artistic skills, media/social media sites that shape public opinion, opportunities for online entrepreneurship and service provision including interior and graphic design, translation or tutoring services, health and beauty care, luxury and lifestyle brands (Assi and Marcati 2020)

## Potential future of work trajectories for women migrant workers in the Asia-GCC corridor in the foreseeable future and the basis for this

Against this backdrop, the more likely future of work trajectories for women migrant workers in the Asia-GCC corridor are charted below with caveats. Demand for migrant women workers in traditional sectors of work not vulnerable to automation will broadly remain the same and even grow in the foreseeable future. New occupations requiring newer and higher skills in these traditional sectors and in non-traditional sectors are also likely to emerge. More specifically these sectors and occupations include (a) various segments of the care sector where women are already engaged: (i) domestic work with a competitive edge for professionally trained domestic workers and those with certified skills in home-based care for children including children with special needs, disability/geriatric care, care for the chronically ill; (ii) institution-based healthcare as nurses and lower end support roles, but potential new openings as occupational therapists, physiotherapists, physicians and special needs care professionals; (b) other social, financial, trade and business services: education, travel/tourism, accommodation/hospitality, retail/trade, financial services/ insurance where women are already engaged: (i) the education sector in existing roles as school/university teachers, researchers and lower end support roles, but potential new openings as educators and researchers in professional application-oriented STEM fields and digital skills and in IT support roles; (ii) the fore-mentioned service sectors (b) outside education in managerial and supervisory roles or financial accounting roles; service, clerical/administrative work; lower-end roles in cleaning, house-keeping, waitressing. Higher and mid-level jobs would require investments in management skills, digital skills to use digital tools and advanced analytics across these sectors (e.g. for e-commerce in goods/services, checking stocks/inventory, enhancing performance, customer care etc.) and to use new technologies and platforms introduced in the financial sector; (c) manufacturing, mining, and construction e.g. in new woman-friendly office-based process management jobs that replace routine, heavy physical labor-intensive operations.

### (a) The Care Sector:

**(i) Paid care work in households** As of 2016, (based on data from the past decade), the annual growth rate in the number of domestic workers in GCC countries was 8.7 percent (35,970 domestic workers), with a traditionally high demand for ‘nannies’, cooks (Tayah and Assaf, 2018), and cleaners. Demand for home-based care and domestic workers will continue to grow, driven by interfacing structural factors. National households in GCC countries bear greater care responsibilities due to women’s increasing education and workforce participation rates. Although national women’s workforce participation rates in the GCC sub-region reached 31 percent of total national employment in 2016 (Ibid), these rates have grown from a much lower threshold and are projected to grow further given GCC states’ Vision 2030 commitments. This is combined with growing child and elder care needs, underlined by regional demographics and cultural norms. Children (0-14 years) needing care constitute a significant proportion of the GCC population. Average life expectancy in almost all GCC states will be 75 years in 2025 and 80 years in 2050 (Khan et al., 2017), increasing the age dependency ratio. Cultural norms in GCC states privilege home-care conventionally provided by women in the family over institutional care. Changes in the household structure from joint to nuclear households, inadequate investment in state-provided institutional child, elder, disability care facilities and insufficient uptake where this is provided creates the demand for domestic workers. Domestic workers directly fill gaps in care work or allow family women to provide this by relieving them of other responsibilities (D’Cunha and Charmmartin, 2012; Tayah and Assaf, 2018). Demand also comes from a large population of dual wage-earning expatriate families needing childcare and domestic work and who prefer professional service with minimal supervision (Tayah and Assaf, 2018).

Migrant women fill deficits in local women's availability for domestic work. Underscoring this is the cultural reticence of GCC women nationals to undertake what is perceived as low-end drudge work in the privacy of another home where they are exposed to males outside their own families (D'Cunha and Charmmartin, 2012). Domestic work has also been relatively untargeted by nationalization policies and bilateral MOUs for domestic workers have been signed between ADD countries of origin and GCC states, for example Bangladesh-Saudi Arabia and Bangladesh-UAE as recently as 2018 (UN Women and SDC, 2019).

Finally the COVID-19 pandemic is generating pressure for domestic workers as GCC women nationals (and elsewhere) struggle to cope with work from home combined with childcare and home-schooling including for children with special needs, and care for other family members with special needs. Workers with professional qualifications in childcare, including special needs care, teaching, home-based nursing, disability and geriatric care are likely to have a competitive advantage.<sup>35</sup>

Decreasing the numbers of migrant domestic workers would require GCC countries to invest in and professionalize these jobs in public institutional settings such as creches, early childhood centers, special needs schools for children, disability and geriatric care centers, assisted living for the elderly and so on. These could become viable employment opportunities for women nationals, although it would demand significant social norm change, and is unlikely to happen in the near future.<sup>36</sup>

**(ii) Institution-based health care work:** GCC countries have prioritized building strong, modern, holistic health infrastructures as part of their 2030 agendas.<sup>37</sup> The WHO estimated that the health care workforce worldwide had a deficit of seven million professionals in 2013 and predicted it would reach 18 million by 2030 (WHO, 2016). GCC states have similar deficits. While on average they have a higher density of pharmaceutical and dental personnel than across the OECD countries (Sheikh, J.I., et al, 2019), the average density of physicians, nurses and midwives, is only 4.6 per 1000, compared to 8.0 in the OECD countries.

Physiotherapists and occupational therapists are also scarce in GCC states. GCC states are consequently heavily dependent on a migrant health care workforce (Ibid). Women nurses and paramedics from India, the Philippines and Sri Lanka for example play an already important role this workforce.

While new opportunities for Asian migrant women are a possibility in under-served specializations such as physicians, physiotherapists, occupational therapists and other professional special needs experts, the demand for migrant women nurses, paramedics and lower end support roles is likely to continue in the foreseeable future in the GCC. COVID-19 prevention and health recovery, and the uncertainty around the evolution of the pandemic has demanded emergency health response on a war-footing that this migrant workforce is tied into, plugging gaps in local labor availability. Healthcare reforms with GCC countries will take time as this demands planning, policy development and execution;

<sup>35</sup> Interview by author with Denise C McGinty, CEO Housekeeping: Domestic Workers Services LLC, Tad-Beer authorized by Ministry of Human Resources and Emiratization, UAE on 11 January 2021.

<sup>36</sup> Ibid.

<sup>37</sup> Initiatives include Qatar's Nursing Strategy 2013–2015 and Nursing and Midwifery Strategy 2015–2018; Saudi Arabia's healthcare reform under its National Transformation Program 2020, and the UAE's mandatory standardized indicators to improve health care quality (Sheikh, J.I., et al, 2019).



creating a research infrastructure to understand emerging and chronic diseases for relevant healthcare; scaling up the infrastructure, curricula and training capacity of existing schools; and establishing new schools that specialize in under-resourced disciplines. Cultural factors in the GCC are likely to encourage jobs for migrant nurses (Ibid) and critical support staff at the lower end of the institutional healthcare hierarchy in the foreseeable future.

**(b) Other social, financial, trade, and business services: education, travel and tourism, accommodation and / hospitality, retail and wholesale trade, financial services and insurance**

**(i) The education sector** GCC states have committed USD 27 billion to boost reforms in the education sector (Ernst and Young, 2015) in line with changing economic and technology landscapes. Reforms range from state investment to attracting foreign investment, encouraging private sector competition, globalizing the education sector and facilitating world class universities set up in the region (Alpen capital, 2018). In the UAE, for example, a wide range of local and international education providers are establishing schools and universities with curricula from the UK, USA, Australia, India and Germany being followed by different institutions (Ford, 2014). The majority of teachers in private higher education institutions who teach specialized and professional courses are expatriates (Naithani, P. (2011). National strategies to groom national populations to take up teaching and faculty positions are underway (Alpen capital, 2018), including education in pedagogy and discipline-based subject matter, also covering specialized applied technology fields. While this gets consolidated, expatriate women, including from certain Asian countries who are also currently employed as educators, could still be recruited for school and university jobs and newer roles in specialized professional instruction in STEM fields and digital technologies. This is however likely to get increasingly competitive.

The pandemic has generated on-line teaching and learning, and many expatriate teachers have returned to countries of origin from where they continue instruction on-line. Skills in on-line instruction, grading, exam supervision, seminars, workshops and conferences are relatively new in the evolving repertoire of skills for school and tertiary educators that expatriate and national women may need to consolidate to be competitive.<sup>38</sup> Such trends could also open IT support jobs for women in the sector.

**(ii) Other social, financial and business services: travel and tourism, accommodation and /hospitality, retail and wholesale trade, financial services and insurance** Women migrant workers hold client-facing or interactive jobs in these sectors. While they are employed to a smaller extent in higher or medium end managerial and supervisory and financial accounting roles, the larger concentration is in medium skilled service or clerical work as reservation and check-in staff at airports and hotels, in-flight service staff, customer care and telephone operators across sectors, sales workers in retail and whole sale trade and insurance, and cashiers and accounts staff across all sectors. At the lower end of the skills spectrum women work in housekeeping and waitressing in hotels/accommodation and in cleaning across these sectors. Cultural norms in GCC countries tend to deter women nationals from taking on front facing interactive roles with a range of clients, and accord less value and prestige to women's fore-mentioned roles in hospitality, retail and wholesale trade, especially at mid and lower levels.

Automation including digitization and online platforms have been introduced in these fore-mentioned sectors in varying degrees across GCC states. Common examples include e-commerce for retail and whole sale trade in commodities and

<sup>38</sup> Interviews by author with young professional GCC country nationals living and working in GCC countries on 4 February, 2021

trade in services such as online systems for purchase orders, bookings and payments for a range of commodities and services; digital tools and advanced analytics used in retail trade to improve performance, online applications to check stocks and respond to customer enquiries or elicit customer feedback,<sup>39</sup> new technologies and platforms introduced by the financial sector region-wide to enhance conventional financial services (Gagnon and Gagnon, 2021), including online banking and offshoring of back office tasks. As noted earlier, this would affect women services workers, shop and other sales and administrative staff in these jobs with medium skills involving repetitive tasks such as data processing and clerical support work (Assi and Marcati, 2020), as well as more skilled women accountants and financial sector workers. Investments in skills upgrading/reskilling can prevent job losses for those at risk and provide new jobs for women.

With projections of non-oil GDP growth expected to return to 2019 levels in 2022 (Augustine, 2021), and delayed projects such as UAE's Expo 2020, Qatar's World Cup and others being rescheduled, work in construction, trade, travel, hotels/accommodation will gradually open up, including for women. In the prevailing situation and for cost effectiveness, some jobs in these sectors, for example in wholesale or retail trade in commodities and trade in services may be performed online and outsourced. Women migrant workers with the required skills are likely to be recruited into these in the short to medium term.

**(c) Manufacturing, mining quarrying and construction** Manufacturing in GCC countries is turning to Fourth Industrial Revolution technologies and methods like decentralized manufacturing, remote monitoring, localized distribution at lower costs and greater efficiency (Gagnon and Gagnon 2021). While women are not heavily represented in these sectors, it will affect those women in automatable jobs. However, automation could create potential job opportunities for women in office roles such as process managers to manage newly automated processes, as physically heavy labor intensive operations and processes performed by males are automated in sectors such manufacturing, mining, and quarrying and construction (Assi and Marcati, 2020). Women's ability to access these jobs will be contingent on employer and community attitudes to women's recruitment into traditional sectors of male employment. Should women be hired, it would likely be migrant women in the short to medium term who dominate low and medium skilled lower wage jobs in the private sector, and because these are emerging jobs in traditional sectors of male employment.

#### **Other future of work determinants on future jobs for women migrant workers in the Asia-GCC corridor**

The fore-going discussion presents likely scenarios on the future of work for migrant women workers in the foreseeable future based on existing secondary data and key informant interviews. These likely 'future of work' technology-driven trends are framed by and are accompanied by evolving socio-economic processes and other future of work determinants at the convergence of unfolding crises in ADD countries of origin and destination. More definitive empirical predictions demand more rigorous sector and country specific empirical research.

These socio-economic-political future of work determinants for women migrant workers jobs are many. Competitive wages in the unorganized women migrant labor market segments including in telework and off-shore outsourcing, and the nature of incentives provided to private sector would likely determine the recruitment choice between low wage migrant women and higher wage GCC women nationals. Nationality-based cultural perceptions also influence recruitment of Asian women migrant workers from particular countries for specific kinds of jobs in the GCC and related

<sup>39</sup> Ibid



entitlements. For example, Nepali women workers are seen as diligent, compliant and responsible. Women migrant workers from the Philippines are considered refined, efficient, quick on the uptake, skilled, and good English speakers.<sup>40</sup> Moreover some categories of women’s work, for instance domestic work, are not targeted by nationalization policies, and nationalization policies overall are still to reach optimum impact. The rate and pace of change in education, training, experience and skill-readiness of GCC women nationals relative to women from ADD countries of origin is another potential future of work determinant for migrant women. The current female to-male ratios in professional and technical jobs in GCC countries are low. Women are inadequately integrated into STEM-related study fields, their participation in Technical and Vocational Education Training (TVET) is low, and fewer women relative to men opt for university degrees offering digital skills (Assi and Marcati 2020). This indicates that good digital gender parity ratios in GCC countries are perhaps less established than they seem.<sup>41</sup> While there is an uptake in online contingent work in the region, women are underrepresented on regional freelancing platforms, typically charge up to 50 percent less than men (Steiglitz, 2019) and have slower career progression tracks relative to male free-lance workers (Accenture, 2017). Further, changes in socio-cultural norms on women’s roles and conduct in the GCC as elsewhere take time and do not match the speed of automation and changes in job related landscapes. These norms, for instance, restrict spatial and geographical mobility away from home, public sphere interactions with non-familial males and underline related legal and institutional support systems related to women’s study, work streams and workforce participation. Cultural norms underline women’s (and men’s) preference for public sector jobs that are considered more prestigious and secure relative to private sector jobs, adversely impacting nationalization policies. GCC women and men nationals tend to privilege academic degrees in terms of content and prestige compared to TVET degrees, and to refrain from retail sales jobs and manual work – traditionally reserved for migrant workers.<sup>42</sup>

ADD countries of origin seem less clear about the precise nature of GCC states’ demand for women migrant workers outside of domestic work and health care. ADD discussions on the demand for domestic work and professionalizing the sector have contributed to this clarity on domestic work. Several countries of origin such as Bangladesh, India, Indonesia, the Philippines, Sri Lanka have institutionalized pre-departure trainings for women migrant workers, including with modules on protecting workers’ rights. Some of these countries have tried to professionalize domestic work through intensive skills training, and certification linked to national skills development and certification programs. Sri Lanka’s National Vocational Qualification (NVQ) Level III for domestic workers is an example.

Moreover, Tertiary and Vocational Education Commission data for 2014 in Sri Lanka shows that women have been enrolling in skills development for non-traditional skilled jobs, yet 81 percent of the 89,524 women migrant workers from Sri Lanka in 2015 primarily to GCC countries were domestic workers (Sri Lanka Bureau of Foreign Employment, 2015).

<sup>40</sup> Interviews by author with domestic workers and expatriate employers in GCC countries on 17 February 2021

<sup>41</sup> The female to-male ratio in professional and technical jobs is low in the UAE (0.22), Saudi Arabia (0.31), Oman (0.35), Jordan (0.44) versus moderate for Egypt (0.62) and good in Lebanon (0.8) and Kuwait (0.9) Female participation in technical and vocational education and training (TVET) programs are low at, for instance 37 percent in UAE and 26 percent in Saudi Arabia (Assi, R and Marcati, C, 2020)

<sup>42</sup> Interviews by author with young professional GCC country nationals living and working in GCC countries on 21 January 2021

While these initiatives by ADD countries of origin are creditable, a mix of factors have inhibited impact optimization. These include continuing social perceptions of domestic work as ‘unproductive,’ ‘intrinsic to women requiring no special skill and hence of low value; gendered cultural norms that undermine women’s recruitment into non-traditional or male-sectors of work; a lack of clarity on the nature of labor demand for women beyond domestic work in GCC states. This is underscored by a lack of comprehensive sex- education- nationality- disaggregated labor market data and analysis on migrant and national workers beyond domestic work in the GCC – capturing current and changing longer term employment landscapes. Further, barring a few recent initiatives, there are a lack of national occupation-based competency standards, skills recognition and mobility policy frameworks and initiatives to strategically guide skills upgrading and mobility for women migrants in domestic work and other sectors.

The infrastructure for TVET, STEM study streams and jobs, digital literacy and use is entrenched to varied levels in ADD countries of origin such as India, Indonesia, the Philippines and Sri Lanka.<sup>43</sup> Available data for these countries suggests some promise in women’s job competencies in these fields, while recognizing differing extents of gender-based inequalities.<sup>44</sup> However greater investment and further strengthening of women’s enrollment, completion of education/training, and technical job uptake in line with clearly articulated GCC labor market demand will be an important determinant of migrant women’s employment in these sectors. This should be governed by better labor standards, that ADD countries of origin seek (GIZ and ILO, 2015; ILO and IOM, 2017). Where countries of origin have relatively small populations and a shortage of medium and high skilled women workers; or where they have a growing ageing population as in the case of Sri Lanka, Thailand and Vietnam (ILO, 2019), or where there may be a hardening of protectionist attitudes and policies towards women there could be relative containment in outflows of women migrant workers.

<sup>43</sup> For example, India has a wide network of skills training institutions under the SKILL India program; STEM related education is well developed and STEM related jobs have grown by 44 percent in the recent past available at <https://www.orfonline.org/expert-speak/stem-and-the-digital-economy-for-women/>; Indonesia’s Ministry of Communication and Informatics (Kementerian Komunikasi Informasi dan Teknologi Republik Indonesia (Kominfo) reported that there were 82 million Internet users in 2014, and Indonesia has the eighth highest number of Internet users in the world (Kominfo, 2014) available at <https://www.sciencedirect.com/science/article/pii/S2452315117303818>). In the Philippines TVET enrolment has more than quadrupled since 1995, reaching almost 2.3 million in 2016: available at [https://www.tesda.gov.ph/Uploads/File/GAD/2019/Gender%20Profile%20of%20the%20TVET%20Sector%20\(final\).pdf](https://www.tesda.gov.ph/Uploads/File/GAD/2019/Gender%20Profile%20of%20the%20TVET%20Sector%20(final).pdf) and STEM education is well entrenched The TVET sector in Sri Lanka focused on GCC-relevant fields, operates through a nationwide training service network with an annual enrollment of more than 150,000 students. Public TVET service providers account for 71% of the total enrollment compared with the private sector (19%) and NGOs 10%) available at: <https://www.adb.org/sites/default/files/publication/176571/tvet-hrd-south-asia-sri-lanka.pdf>; well developed STEM education available at <https://www.ips.lk/talkingeconomics/2020/02/11/girls-in-stem-how-is-sri-lanka-faring/>; and high levels of digital and computer literacy; higher use of smart phones in rural than urban areas and high use of internet for education and work available at [http://www.ft.lk/ft\\_view\\_editorial/Bridging-the-digital-literacy-gap/58-702581](http://www.ft.lk/ft_view_editorial/Bridging-the-digital-literacy-gap/58-702581).

<sup>44</sup> According to All India Survey on Higher Education (AISHE) 2018-19 by Ministry of Education, women constitute nearly 43 percent of the total STEM enrollments in the country. However, the disparity becomes starker with subsequent qualifications available at <https://www.orfonline.org/expert-speak/stem-and-the-digital-economy-for-women/>. In Indonesia women constituted 42.9 percent of TVET enrollees in 2017 available at [https://unevoc.unesco.org/pub/tvet\\_country\\_profile\\_indonesia\\_revised\\_may\\_2020.pdf](https://unevoc.unesco.org/pub/tvet_country_profile_indonesia_revised_may_2020.pdf).

In the Philippines, female TVET enrollees outnumber male enrollees (53 percent to 47 percent in 2016,) but not as much as in tertiary education (57 percent to 43 percent). Among tertiary education enrollees, over 26 percent were in the sciences, technology and mathematics (STEM) streams, with men outnumbering women (63 percent to 37 percent), particularly in engineering (71 percent to 29 percent). If medicine and allied fields are included, the percentage jumps to 32 percent, with women’s share rising by six points to 43 percent. Overall, women’s STEM study completion is relatively better at 41 percent vs men’s 59 percent.<sup>6</sup> When medicine and allied fields are included in STEM, women’s total share jumps to 48 percent among the graduates. Women and men TVET enrollees have reportedly similar training completion rates in recent years available at [https://www.tesda.gov.ph/Uploads/File/GAD/2019/Gender%20Profile%20of%20the%20TVET%20Sector%20\(final\).pdf](https://www.tesda.gov.ph/Uploads/File/GAD/2019/Gender%20Profile%20of%20the%20TVET%20Sector%20(final).pdf); In Sri Lanka, primary and secondary school enrollments and completion rates are similar for girls and boys, while girls have higher enrollment and retention rates in upper secondary and tertiary education. Also according to the University Grants Commission (UGC), females accounted for nearly half – or 49% – of undergraduate enrollments in STEM subjects in local universities in 2017, versus a global figure of 35% available at <https://www.ips.lk/talkingeconomics/2020/02/11/girls-in-stem-how-is-sri-lanka-faring/>

Finally, the fore-mentioned socio-economic-political determinants of the future of work for women migrant workers are complicated by the COVID-19 crisis. This includes the rate and pace of containment of the spread of COVID-19 and economic recovery in countries of origin and destination accompanied by the extent of job-led growth.<sup>45</sup> GCC countries have seen a huge and sudden exodus of men and women migrant workers with critical skills, amplifying challenges to completing major development projects and to meeting their SDG 2030 objectives. As elsewhere, GCC states are caught in the grim calculus of balancing health, economic and political interests, including employer pressure to open up the economy which will need migrants, including low skilled migrant workers. Several ADD countries of origin have announced relief measures and stimulus packages to respond to impacts of the pandemic.<sup>46</sup> Despite efforts at health care, social safety net provisions and job creation, countries of origin lack the adequate social, economic and health infrastructure to cope with large returns of migrant workers amid deepening economic crisis, unemployment, relative declines in remittances, and much larger populations than GCC states. Migrant returnees, including returned women migrants are waiting to remigrate, as they have been affected by job and wage loss, debt, and exclusion from social safety nets (D’Cunha, 2021a). This situation in countries of origin and destination and the promise of vaccines will lead to a cautious opening of economies including for women migrant workers. This could potentially be marked by greater competition between countries of origin, the imposition of more stringent health criteria for entry into GCC states, potentially higher skill demands where automation has accelerated, and higher costs for migrants. This is likely to compromise workers’ protection, unless some fundamental structural changes are put in place (D’Cunha, 2021b). Some ADD countries of origin have begun exploring employment opportunities for their citizens in countries in Southeast Asia, Europe and North America. Likewise demand in GCC states for women migrant workers, especially women domestic workers from Africa, such as English-speaking Ethiopian, Kenyan and Ugandan women domestic workers could increase.<sup>47</sup> In other words negotiations over “terms of trade” governed by social, economic and political interests of countries of origin and destination will be an important determinant of future jobs, protection levels and migration corridors for women migrant workers.

<sup>45</sup> The IMF and others predict slow complete turnaround in the GCC from the oil crisis and COVID-19 related economic crises. Real GDP growth of 2.5 per cent for the GCC is forecasted over 2021-23 after a contraction of about 6 per cent in 2020 triggered by the oil crisis and COVID-19 related restricted economic activity (Augustine, 2021). The World Bank’s East Asia and Pacific Economic Update says that growth will be just 4.4 percent across East Asia and the Pacific, excluding China, below the region’s long-term average (Strangio, 2021), while for South Asia growth is expected to increase by 7.2 percent in 2021 and 4.4 percent in 2022 (World Bank, 2021). India will see more than 10 percent growth in 2021-22; Bangladesh’s GDP will increase by 3.6 percent in 2021; Nepal’s GDP is expected to grow by 2.7 percent in the fiscal year 2021-22 and recover to 5.1 percent by 2023; Pakistan’s growth is expected to reach 1.3 percent in 2021 (World Bank, 2021). However more recently the pandemic has worsened in India and this will change its growth prospects.

<sup>46</sup> For example, India announced a stimulus package equivalent to 2 per cent of GDP, and Bangladesh and Pakistan 3.3 per cent and 1.6 per cent of their GDPs respectively (Wignaraja, G et al., 2020).

<sup>47</sup> Interview by author with William Gois, Regional Coordinator Migrant Forum for Asia on 4 February, 2021.

## IV. RECOMMENDATIONS FOR ACTION ON THE FUTURE OF WORK FOR WOMEN MIGRANT WORKERS, DRAWING ON PROMISING SCALABLE PRACTICE

The fore-going discussion points to the need for effective policies and scalable programmatic action to enhance women migrant workers' employability aligned with labor market demand in GCC states, backed by more regular migration pathways, fair and ethical recruitment and decent work for women migrant workers. Action should adopt a whole of government and whole of society approach across countries of origin and employment, including via the ADD platform and ensure active engagement with women migrant workers and their representative organizations. This will ensure coherence, amplified impact and inclusive development. Recommendations are based on learnings from promising practice in ADD member countries - a valuable starting point.

### **GOVERNMENTS SHOULD CO-ORDINATE GLOBALLY, REGIONALLY AND BILATERALLY AND USE EVERY SOURCE IN THE NATIONAL TOOLKIT TO CREATE FISCAL SPACE TO INVEST IN A GENDER-RESPONSIVE COVID-19 RESPONSE AND LONG TERM RECOVERY TO:**

**1. Preserve jobs, enhance labor mobility and protections, compensate wage reductions and non-payment, ensure social protection, free COVID-19 testing and treatment, equitable access to vaccinations, regularization opportunities for all women and men migrant workers.**

**2. Generate current and post-COVID-19 labor market data for national and migrant women and men by sector, occupation, activity, education, and skill/wage levels - disaggregated by sex, age, and nationality at minimum.** This will visibilize the totality of national and migrant women's and men's work and contributions in the dual labor market context of GCC countries, promote positive images of migrants, cohesion and stability. It will help adoption of evidence-based measures to ensure efficient labor migration governance that matches workers' education, training and skills with labor market demand, commensurate wages and other benefits.

**3. Enhance the provision of comprehensive information to women migrant workers:** Building on the existing Comprehensive Information and Orientation Program (CIOP) developed in the framework of the ADD, enhance the provision of information at key stages of migration: before decisions to migrate are made, pre-departure, post-arrival and pre-return to ensure a productive migration experience. Ensure that information addresses (a) the nature of labor market demand for women and means of enhancing employability; (b) policies, procedures, mechanisms and services governing recruitment, entry, work, residence and return and how to invoke these; (c) women's labor and social entitlements, protection issues, available remedies and how to access these. In addition, tailor content to the sectors women migrants work in along migration corridors and ensure that this information is accessible to women in terms of communication formats, delivery sites and timeframes.

**4. Ensure harmonized worker-employer skills matching and skills-based mobility for women migrant workers aligned**

<sup>48</sup> In June 2020 civil society organizations and unions for example led by Migrant Forum in Asia (MFA) and the Cross Regional Center for Refugees and Migrants (CCRM), generated effective response across Asia and the Arab States on the recovery of unpaid/reduced wages and entitlements for women and men migrant workers during COVID-19. Many Asian and Arab governments acted on this prior to and after the afore-mentioned action (Migrant Forum in Asia, 2021)

<sup>49</sup> [www.abudhabidialogue.org](http://www.abudhabidialogue.org)

**with labor market demand** by developing national and regional occupation-based competency standards (NCS and RCS) with commensurate wages and benefits; developing, assessing and recognizing workers' skills against these standards; and promoting mobility tied to these standards, including via Mutual Recognition Agreements (MRAs), or Skills Passports. In addition, encourage skills development and recruitment of women in non-traditional sectors of work and jobs.

## PROMISING PRACTICES

- Template-setting for harmonized skills matching and skills-based mobility for domestic workers:** The ADD report on the Future of Domestic Work in GCC countries (2018) details these steps that include: (a) understanding the varied and specific dimensions of domestic work; (b) mapping the current structure of labor market demand and recruitment for domestic work based on discussions with employers, workers and recruiters; This includes mapping occupational and related task differentiation within domestic work by sex, nationality, skill, wages; modalities used by placement agencies to recruit and match employers and workers; actual skills and competencies needed for the various occupations in the sector : vocational skills (knowledge and know-how to perform the job), transversal skills (ability to learn, communicate, work in a team, solve problems), attitudinal skills (worker attitude to the job in terms of dependability and flexibility in responding to employer demand), and cultural perceptions of employers and workers to the work sector and each other; (c) developing occupational standards that capture occupational differentiation in domestic work with commensurate wages and benefits; (c) developing, assessing and recognizing domestic workers' skills against these standards through curriculum development, skills upgrading and certification; (d) promoting workers' mobility within a sector and outside it in line with these occupational standards; (e) linking labor admission to skill certification or recognition of prior learning (RPL) systems; (g) developing RCS to recognize regional mobility of domestic workers within the GCC, and reflecting RCS in mutual recognition agreements (MRAs); (f) linking RCS to regional skills passports that recognize the skill and expertise of domestic workers, migrating within the GCC; and promoting recognition of these passports for returning workers. This would enable countries of origin to better manage skills development and reintegration.

This process for occupational standard setting and mobility partnership initiatives could be extended to other sectors of women's work such as healthcare, hospitality and more.

- Skills competency standard setting for domestic and care workers in the UAE:**<sup>50</sup> The Abu Dhabi Dialogue endorsed the need to develop national occupational standards, assess and recognize workers' skills against such benchmarks. This would help match employer expectations and worker qualifications better and enhance work quality. The Abu Dhabi Quality and Conformity Council (QCC) has piloted the development of occupational terms of reference and national competency standards for four main occupations in domestic work: head housekeeper; housekeeper; child caregiver; and home cook. This is significant given



the demand for domestic workers and care givers in the GCC. It could be customized for other care giving occupations, such as care for older persons, and to develop regional competency standards, assess and recognize skills for regional mobility of domestic and care givers in the GCC subregion. Sharing these standards with countries of origin would enable the latter to upgrade training curricula in line with these standards that would enhance skill levels related to, among other things, on-demand work, supervising other domestic workers and management of workplace conflicts, use of modern household appliances and detergents, cooking, geriatric and disability care, childcare including for children with special needs.

- Skills training, assessment, certification and recognition of prior learning by Countries of Origin:** the Philippines: The Philippines Technical Education and Skills Development Authority (TESDA) Onsite Assessment Program (TOAP) institutionalized in 2015, enables Filipino migrant workers (FMWs) obtain TESDA/government-issued National Certificates of Competency recognizing their levels of knowledge and technical skill. This can help workers improve their economic prospects as employees or entrepreneurs. Of significance is TOAP's targeted outreach to migrant workers in vulnerable occupations such as domestic workers; extending the program to migrant workers in destination countries through TOAP visiting teams, including to countries in the Arab, East and Southeast Asian regions; forging partnerships with Filipino organizations and trainers in destination countries to reach more workers to secure skills recognition. As of December 2018, 2,681 Filipino migrant workers benefitted from TOAP despite a host of operational challenges: the context-specificity of each destination country with varied access to accredited assessors, equipment, materials supply, space and facilities for assessments, and constraints in worker availability. TESDA is striving towards accreditation of Filipino trainers, training and accreditation of assessors in destination countries, and maintaining close links with Philippines Overseas Labor Offices and Filipino organizations and institutions that provide training (Arayata, 2018)
- Non-traditional TVET training for women in Sri Lanka:** Labor market information from Sri Lanka's Tertiary and Vocational Education Commission in 2014 suggests that (a) women constituted almost half - 9199 (49.5 percent) out of a total of 18,599 male and female trainees for TVET skills development training courses;<sup>51</sup> (b) out of a total of 15 courses, women were enrolled in all 11 non-traditional skills development training courses together with men;<sup>52</sup> (c) more women enrolled and qualified to work than men in various components of the non-traditional Information and Communications Technology courses (information & communication technician, information and communication technology, PC-based application (part time), ISM operator). Women numbered 4,189 (70.7 percent) out of a total of 5,929 in these four ICT related courses, and 45.5 percent of all women in the 15 trainings;<sup>53</sup> (d) more women enrolled and qualified to work than men in traditional women's training courses (tailor, beautician, hairstylist) numbering 4,467 (93.9 percent) out of a total of 4,758, and 64.5 percent of all women in the 15 training courses<sup>54</sup>.

<sup>50</sup> Interview by author with HE Mr. Abdulla Hassan Al Muaini, Executive Director, Central Testing Laboratory Sector, Abu Dhabi Quality and Conformity Council on 23 March, 2021

<sup>51</sup> This authors calculations based on Sri Lanka Labour Market Information System, TVEC, 2014 cited in IOM and ILO, 2017

<sup>52</sup> Ibid The eleven non-traditional courses in which women were enrolled were information & communication technician (ICT), domestic electrician, information and communication technology, woodcraftsman (furniture), PC-based application (part time), cook, welder, ISM operator, aluminium fabricator, construction craftsman (masonry), automobile mechanic, computer hardware technician. The remaining three traditional courses were tailor, beautician and hairstylist.



- Bilateral Skills Harmonization Partnerships between India and the UAE:**<sup>55</sup> The Ministry of Skill Development and Entrepreneurship, Government of India and the National Skill Development Corporation in India, have a skills harmonization partnership with the Ministry of Human Resources and Emiratization, Government of UAE and the Abu Dhabi Quality and Conformity Council. This seeks to match certified Indian workers' skills with UAE's labor market demand. This partnership (a) aligns occupational qualifications of the UAE and India; (b) trains, up-skills and certifies workers according to set standards; (c) recognizes Indian awarding bodies; (d) creates upskilling infrastructure in the UAE; and (e) incentivizes recruitment and retention of skilled workers. It piloted the recruitment of 100 skilled and certified workers across two benchmarked occupations in the construction sector. The Government of the UAE will also recognize Indian qualification sectors, such as health care, tourism and hospitality, retail, domestic work, security and 'Future Technologies' viz blockchain, 3D printing and artificial intelligence). Several of these sectors are largely women oriented.
- Wage Protection Systems:** Several GCC countries have introduced Wage Protection Systems (WPSs), including UAE (2009, upgraded in 2016), Oman (2014), Qatar and Kuwait (2015) and Bahrain (2018). This is an electronic wage transfer system for male and female workers. It requires employers to deposit workers' wages per contract, in a timely manner every month into banks and financial institutions authorized to render the service. WPSs seek to prevent employers from withholding due wages especially of migrant workers, as direct transfers of agreed wages into employees' bank accounts ensure an official record of payment that can be monitored on line.<sup>56</sup> But there are continuing challenges such as the need for more effective enforcement in case of breach, integration of contractual information and expansion of WPS coverage to all workers including migrant domestic workers, and need for additional provisions to protect worker's wages when companies are unable to pay or are bankrupt (ILO, 2020).

The UAE's Wage Guarantee System, UAE's and Qatar's Workers' Support and Insurance Fund are examples of such complementary mechanisms. If employers in the UAE fail to transfer workers' wages or pay any other entitlement, the worker can report this to the Ministry of Human Resources and Emiratization (MOHRE) who notifies the employer. Continuing non-payment for various reasons, including bankruptcy, has stringent administrative actions provided for against the employer. The case can also be referred for public prosecution in Court. If the worker is still not paid per court order, then MOHRE pays the workers dues by liquidating the bank guarantee amounting to 3000 AED per worker deposited by the employer in the MoHRE bank account when seeking approval to recruit a foreign worker and before issuance of the worker's residency permit.<sup>57</sup> MOHRE has also launched an Insurance Policy for Worker Protection in cooperation with a pool of national

<sup>53</sup> Ibid

<sup>54</sup> Ibid

<sup>55</sup> Interview by author with HE Mr Abdulla Hassan Al Muaini, Executive Director, Central Testing Laboratory Sector, Abu Dhabi Quality and Conformity Council on 23 March 2021

<sup>56</sup> Interview by author with Mr. Ibrahim Almari Director of Health and Safety Department and Former Manager of WPS system, UAE and Ms Rasha Assem Saleh, International Relations Expert ADD Secretariat, 13 January, 2021

insurance companies. This covers workers' due wages and entitlements up to 20,000 AED, including end of service entitlements and air fare back home. The insurance company works to retrieve this money from the company, including through the courts.<sup>58</sup> The UAE is also extending the WPS system to migrant domestic workers. In early 2021 a pilot covering 423 workers facilitated their wage transfers into bank accounts with debit cards issued to them. MoHRE is monitoring the governance and operation of the system to evaluate its outcomes, define the gaps and related response, before extending it to all migrant domestic workers.<sup>59</sup>

**5. Introduce fair and accountable recruitment processes that are accessible to and protect women migrant workers, especially low skilled workers including domestic workers.** Many GCC countries have introduced public-private partnerships to e-recruit migrant workers, including domestic workers. These are innovative initiatives that facilitate job matching, reduce intermediaries, facilitate provision of comprehensive reliable information on a legitimate site, help track workers and related migration stakeholders. However the efficacy of on-line recruitment, particularly for low-skilled workers could be enhanced by information in languages of key countries of origin in addition to English, and Arabic; outreach by countries of origin to low-skilled women migrant workers who are not technologically-adept to understand content and better access the platform; more active engagement on queries and complaints by recruiting agencies and other parties in both countries; more public information on agency vetting; and monitoring and accountability for non-compliant agencies in countries of origin and destination, including ensuring that recruitment costs are not passed on to workers. Workplace protection would need additional measures (UN Women, 2019)

## PROMISING PRACTICES

- Public-private partnerships for e-recruitment of migrant women domestic workers in KSA:** The ADD The Kingdom of Saudi Arabia was among the pioneers of public-private partnerships for e-recruitment of migrant women domestic workers. In 2014 the KSA launched Musaned, an innovative online recruitment platform for migrant domestic workers including from Bangladesh, via public-private tie-ups. The initiative aimed to streamline recruitment and ensure transparency and accountability by authorizing specific recruitment agencies in both countries to deploy workers to KSA, reducing intermediaries, allowing the Ministry of Labor and Social Development KSA monitor the contracting process, and archiving personal information and relevant documents online. This online database enables the Governments of KSA and Bangladesh to identify and track a documented migrant domestic worker, her employer and recruiting agency especially in the case of a problem, or dispute between parties. This is a significant advance over hard-copy documentation and tracking. As of September 2018, the website included information on rights and obligations of employers and employees, all licensed recruitment offices/companies listed in both countries, complaints mechanisms, guidance on filing complaints, documents required for recruitment and e-recruitment services. (UN Women, 2019)

<sup>57</sup> Ibid

<sup>58</sup> Ibid

<sup>59</sup> Ibid

## 6. Enhance the efficacy of bilateral labor agreements and MOUs via robust gender-responsive protection provisions.

There are some good examples of bilateral MOUs on domestic workers in Southeast Asian ADD member countries. For such agreements to work better they should include key labor rights such as the application of minimum wage, fixed recruitment fees, skills-based admission, social security provisions. They must also have monitoring and enforcement mechanisms. Moreover, the larger policy and accountability ecosystem must ensure decent work, regular, safe, affordable migration pathways and social norms and practices that protect all migrants (UN Women and ASEAN 2017).

### PROMISING PRACTICES

- Bilateral MOUs between Malaysia and Indonesia protecting migrant domestic workers:** In 2011, Malaysia and Indonesia signed a protocol amendment to an earlier MoU for Indonesian domestic workers with the following improvements: capping recruitment fees with shared payment between the employer and worker; a weekly rest day or wages at a time-and-a-half for those opting to work; direct wage deposits into workers' bank accounts; workers' retention of passports; guidelines on the roles and responsibilities of recruiting agencies, employers, and domestic workers per the MoU; standard employment contracts; having joint taskforce to monitor compliance; (UN Women and ASEAN, 2017)

## V. ADD'S UNIQUE LEVERAGE ON THE FUTURE WORK FOR WOMEN MIGRANT WORKERS IN THE ASIA-GCC CORRIDOR: JOINT PARTNERSHIP PROPOSALS

More specifically, the ADD can use its unique role and position to facilitate thought leadership and evidence-based action on the future of work for women migrant workers through coordination and collaboration among ADD member governments and civil society on focused areas of partnership. Proposals are:

- 1. Continue to facilitate the production of research papers on emerging and past-continuing issues** on various aspects of the future of work for women migrant workers such as medium and high skilled migrant women's work in sectors beyond domestic work - health care; women and technology (STEM field and digital technology related jobs); women in the hospitality sector; the value and contribution of care work, including domestic work and its professionalization etc.
- 2. Provide a platform for regular thematic dialogue on women migrant workers jobs and related issues:** This could focus on research findings and other themes and on sharing scalable good practice on women migrant workers implemented by ADD member countries or others (e.g. national competency standards for domestic workers etc; skills upgrading for women migrant workers).
- 3. Pilot concrete bilateral and regional initiatives on women migrant workers. Potential areas could include:** (a) developing regional competency standards for domestic workers, and national competency standards for selected categories of women health workers, and hospitality sector workers; (b) piloting bilateral skills mobility partnerships for (i) domestic workers (ii) categories of women health care workers (e.g. nurses) (c) categories of women hospitality sector (defining competency standards, developing curriculum, delivering training, assessing and recognizing skills, recruiting, skills based visa and entry); (d) developing training programs tailored specifically for employers of domestic workers.

**Table 1: . Number and proportion of female migrant employment, by sex and economic sector in selected GCC countries (latest year)**

No.		Kuwait (2013)		Qatar (2012)		Saudi Arabia (2013)		All 3 Countries		Total	Remarks
		M	F	M	F	M	F	M	F		
	<b>Total no of Migrants K</b>	1,356,177	128,270	1,257,981	137,792	6,134,181	671,988	8,798,339	938,050	9,736,389	
	<b>Migrants in % age</b>							90.4 %	9.6 %		
	<b>Eco Sector</b>										
1	<b>Construction</b>	160,013	4,098	582,445	2,948	1,591,523	7,560	2,334,981	14,606	2,348,587	
	%	11.8 %	3.3 %	46.3 %	2.1 %	26.0 %	1.2 %	99.4 %	0.6 %		
2	<b>Basic Trade, Wholesale, retail</b>	602,178	57,115	158,506	5,616	1,341,755	8,573	2,102,439	71,304	2,173,743	
	%	44.4 %	44.4 %	12.6 %	4.0 %	21.9 %	1.3 %	96.7 %	3.3 %		
3	<b>Household with employed persons</b>	-	-	56,609	91,824	902,795	510,017	959,404	601,841	1,561,245	Only 2 countries
	%			4.5 %	65.4 %	14.7 %	79.5 %	61.4 %	38.5 %		
4	<b>Community &amp; Social Services</b>	216,281	47,056	Included in education		140,649	-	356,930	47,056	403,986	Only 2 countries
	%	16.0%	35.6 %			2.3 %		88.4 %	11.6 %		
5	<b>Manufacturing</b>	132,885	6,848	116,992	56	484,516	2,816	734,393	9,720	744,113	
	%	9.8 %	5.3 %	9.3 %	0.4 %	7.9 %	0.4 %	98.7 %	1.3 %		
6	<b>Agriculture Forestry Fisheries</b>	57,885	126	Not specified		336,016	864	393,901	990	394,891	Only 2 countries
	%	4.3 %	0.1 %			5.5 %	0.1 %	99.7 %	0.3 %		
7	<b>Transport Storage</b>	70,081	2,718	70,447	4,212	150,830	1,664	292,358	8,594	300,952	
	%	5.2 %	2.1 %	5.6 %	3.0 %	2.5 %	0.3 %	97.1 %	2.9 %		
8	<b>Hotel Restaurant</b>	Included in Wholesale & Retail		Not specified		227,559	323	227,557	323	227,882	Only 1 country
	%					3.7 %	0.1 %	99.9 %	0.1 %		
9	<b>Health Care &amp; Social Work</b>	-	-	Included in Education		214,444	68,707	214,444	68,707	283,151	Only 1 country
	%					3.5 %	10.7 %	75.7 %	24.3 %		
10	<b>Financial Services Insurance</b>	79,845	8,290	Not specified			30,499	79,845	38,789	118,634	Partially specified for only 2 countries
	%	5.9 %	6.4 %				0.5 %	67.3 %	32.7 %		
11	<b>Public Admin Defence</b>	-	-	42,771	2,527	167,315	1,246	210,086	3,773	213,859	Only 2 countries
	%			3.4 %	1.8 %	2.7 %	1.9 %	98.2	1.8		
12	<b>Mining Quarry</b>	8,837	630	88,059	1,966	26,616	362	123,512	2,958	126,470	
	%	0.7 %	4.9 %	7.0 %	1.4 %	0.4 %	0.1 %	97.7 %	2.3 %		
13	<b>Education</b>	-	-	21,386	20,078	153,956	29,273	175,342	49,351	224,693	Only 2 countries
	%			1.7 %	14.3 %	2.5 %	4.6 %	78.0 %	22.0 %		
14	<b>Real Estate</b>	Included in Financial Services		Not Specified		34,707	0	34,707	0	34,707	
	%					0.6	0	100 %			
15	<b>Electricity, Gas &amp; Water</b>	5,187	125	Not Specified		20,503	0	25,690	125	25,815	Only 2 countries
	%	0.4 %	0.1 %			0.3 %	0	99.6 %	0.4 %		
16	<b>Other Economic Activities</b>	22,985	1,714	120,766	8,565	310,498	10,084	454,249	20,363	474,612	
	%	1.7 %	1.3 %	9.6 %	6.1 %	5.1 %	1.6 %	95.7 %	4.3 %		

**Source:** Author's expanded calculations based on Table 15 in Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and ILO. (2015); \*Saudi Arabia, Central Department of Statistics, [www.cdsi.gov.sa/english](http://www.cdsi.gov.sa/english) [accessed 2014]; \*\*Qatar, Labour Force Survey, 2012; Kuwait, PACI.

**Table 2: Distribution of Migrant Workers by Sex and Economic Sector/Occupation in Oman, 2017**

SECTOR/OCCUPATION	NUMBER OF MIGRANT WORKERS			% OF TOTAL		Total No. of M & F in Sector/ occupation as % age of total
	M	F	Total	M	F	
Administration and Management	34,735	2,341	37,076	93.7	6.3	2.1
Scientific, Technical and Human Matters Specialists	73,654	7,975	81,629	90.2	9.8	4.5
Scientific, Technical and Human Subjects Technicians	47,357	10,998	58,355	81.2	18.8	3.2
Clerical Occupations	2,175	64	2,239	97.1	2.9	0.1
Sales Occupations	96,273	3,718	99,991	96.3	3.7	5.7
Service Occupations	301,166	167,074	468,240	64.3	35.7	26.1
Agriculture	94,920	1	94,921	99.9	0.10	5.3
Industrial, Chemical and Food Industries	130,180	1,722	131,902	98.7	1.3	7.3
Principal and Auxiliary Engineering	821,235	101	821,336	99.9	Less than 0.1	45.7
<b>Total</b>	<b>1,601,695</b>	<b>193,994</b>	<b>1,795,689</b>			<b>100</b>

**Source:** Author's expanded calculations based on National Centre for Statistics and Information data Sultanate of Oman. (2017). Labour Market.



**Table 3: Distribution of Migrant Workers by Sex and Economic Sector in Saudi Arabia, 2018**

SECTOR/OCCUPATION	NUMBER OF MIGRANT WORKERS			% OF TOTAL		Total No. of M & F in Sector as % age of total
	M	F	Total	M	F	
Post and Telecommunications	275,489	1,134	276,623	4.11	1	4.0
Trade	1,733,272	26,578	1,759,850	25.86	12	25.5
Construction	2,846,104	26,932	2,873,036	42.46	12	41.6
Mining/quarrying	68,630	915	69,275	1.02	0	1.0
Other collective and social services	385,772	88,666	474,438	5.76	40	6.5
Agriculture/fishing	77,479	206	77,685	1.16	0	1.1
Manufacturing	655,328	17,346	672,674	9.78	8	9.8
Electricity, gas, water	52,720	112	52,832	0.79	0	0.8
Financial insurance, real estate, business services	608,024	60,554	668,578	9.07	27	9.7
Other activities	1	3	4	0.00	0	0.0
<b>Total</b>	<b>6,702,549</b>	<b>222,446</b>	<b>6,924,995</b>			

**Source:** Author's expanded calculations based on General Authority for Statistics Kingdom of Saudi Arabia data. (2018). Labor Market Fourth Quarter 2018.

**Table 4: Distribution of Migrant Domestic Workers by Sex and Occupation in Saudi Arabia, 2018 (based on administrative records of the Ministry of Labor and Social Development)**

Occupation	NUMBER OF DOMESTIC WORKERS			% OF TOTAL		
	M	F	Total	% of M DW	% of F DW	% of occupations in Total DWs
Housekeeper	1,154	519	1,673	0.07	0.06	0.07
Driver	1,308,512	181	1,308,693	80.38	0.02	53.31
Cleaner	294,872	816,772	1,111,644	18.11	98.78	45.29
Cooks & food providers	14,999	4,574	19,573	0.92	0.56	0.79
House, building, restroom guards	4,886	203	5,089	0.30	0.02	0.21
House farmer	2,200	1	2,201	0.14	0.00	0.09
Home-based tailors	631	607	1,238	0.03	0.07	0.05
Home-based nurses and health professionals	575	1,771	2,346	0.04	0.21	0.10
Home-based teachers & nannies	18	2,267	2,285	0.001	0.28	0.09
<b>Total</b>	<b>1,627,847</b>	<b>826,895</b>	<b>2,454,742</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Source:** Author's expanded calculations based on General Authority for Statistics Kingdom of Saudi Arabia data. (2018). Labor Market Fourth Quarter 2018.

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