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Demography, Migration, and the Labour Market in Oman

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Demography, Migration, and the Labour Market in Oman*

Françoise De Bel-Air

Abstract: As of November 15, 2018, estimates of the Sultanate's total population stood at 4,655,366, of whom 2,047,690 (44 per cent) were foreign nationals. Foreign workers are overwhelmingly from the Asian subcontinent: Indians, Bangladeshis, and Pakistanis together make up 86 per cent of the total workforce and 93 per cent of the male workforce in 2018. Eighty-six per cent of all foreign workers were employed in the private sector that year, and 11 per cent were filling managerial and “white collar” posts. The flow of foreign workers to Oman rose over the 2000s up until 2016 but has been decreasing since then. High levels of youth unemployment and poverty spurred popular protests in 2011, which slowed down economic diversification and private sector's development process. New cases of unrest late 2017 prompted the government to enact bans on recruiting foreign labourers in several economic sectors and to create government jobs. Omanisation quotas are also enforced and the hiring of Omani nationals in every business has become mandatory. Since 2010, frequent amnesty and deportation campaigns have also targeted foreign residents in irregular situation.

Keywords: Oman, Foreign and National Populations, Foreign Population, Labour Market, National and Foreign Labour, Statistics, Omanisation, Irregularity, Amnesty, Deportation.

Introduction

Migration is at the heart of Oman's history and socio-demographic framework. Trade relations (including slave trade) with the coastal regions of East Africa were established in the Middle Ages. Indian merchants from the Gujarat region in the north-west of India settled in Omani ports during the fifteenth century. Oman's colonial empire later developed transnational ties with the Indian subcontinent (Baluchistan), East Africa (Zanzibar), Persia and the rest of the Gulf region, as populations travelled between Oman and these territories in search of livelihoods. Many Baluchi, for

* This is a fully revised and updated version of a previous paper with the same title by the same author (GLMM - EN - No.9/2015).

instance, were enrolled into the country's armed forces while wealthy Omani merchants and poor workers alike settled in Tanzania and elsewhere in East Africa. After Pakistan and Tanzania gained independence, in 1947 and 1964, respectively, descendants of Omani settlers as well as populations originating from these areas "returned" to Oman and were incorporated into the country's multicultural, multi-religious, and multi-ethnic society.¹ Labour-oriented migration also enhanced the mobility of population from and to Oman. Since oil was first exploited in the Gulf region in the 1930s, poverty had pushed a majority of low-skilled, low-educated Omani workers to seek employment in the neighbouring Gulf countries.² Exploitable oil fields in Oman were indeed discovered only in 1964, and Petroleum Development (Oman) Ltd. (PDO) began production in August 1967.³

However, following Sultan Qaboos bin Said Al Said's accession to the throne in 1970, Omani expatriates were encouraged to return, and emigration flows reversed.⁴ Furthermore, after the oil-boom of 1973, the Sultanate became an importer of foreign labour. Owing to Oman's historical ties with South Asia,⁵ Asian workers made up the bulk of foreign workers from the start.⁶ During the 1990s, after the First Gulf War when oil prices fell and an economic slowdown resulted, the number of foreign residents seemed to stagnate (0.4 per cent annual growth on average between 1993 and 2003).⁷ However, it doubled between 2003 and 2009: Oman's economic performance started improving significantly in 1999 due to the upturn in oil prices.⁸ Foreign nationals made up 26.5 per cent of the total population in 1993, 23.9 per cent in 2003, and 36 per cent in 2009, when the global financial crisis occurred.

Since 1970, Oman has embarked on an ambitious programme of economic liberalisation and modernisation sustained by high oil prices. The Sultanate evolved from a country lacking in basic services and infrastructure to a modern state. The Human Development Report of 2010, entitled "The Real Wealth of Nations," attested to this rate of progress by ranking Oman as the fastest HDI (Human Development Index) mover globally over the past forty years: the index more than doubled between 1970 and 2010, from 0.36 to 0.79. Interestingly, this rapid rate of development was achieved without a comprehensive and publicly documented knowledge of the Sultanate's demography, as the first census ever conducted in Oman only took place in 1993.⁹ Before the 1990s, partial demographic and socioeconomic data were collected in the framework of the Five-Year Development Plans and included estimates of the labour force by nationality.¹⁰ However, most data concerned only the Omani population.

Oil rent has been instrumental in financing the state-building enterprise in Oman since 1970.¹¹ However, the country is less hydrocarbon-rich than other GCC states, and Omani policy-makers are increasingly focussed on diversifying the country's economy. The Sultanate's long-term development master plan launched in 1996, Oman Vision 2020, advocates economic diversification, privatisation and localisation ("Omanisation") of the labour force. Following drastic economic reforms, Oman became a member of the World Trade Organisation in October 2000. In its eighth five-year plan (2011-15), the government has increased spending on key infrastructure projects, which is enhancing Oman's status as a logistics hub in the region. Expansion and development of the three major ports at Salalah, Duqm, and Sohar is in progress, major upgrades to the international airports in Muscat and Salalah are underway,¹² together with other large-scale infrastructural developments, for instance in the hospitality sector.¹³ The Tanfeedh Programme, the National Programme for Enhancing Economic Diversification, was launched late 2016, "as a core tenet of the country's ninth-five-year plan."¹⁴ Logistics, tourism, mining,

manufacturing and fisheries have all been identified as potential future economic drivers. These will be the focus of development under the next plan, Vision 2040.¹⁵ From a low of 27.1 per cent in 2016, when oil prices were at their lowest, the share of hydrocarbons in Oman's GDP reached 32.5 per cent during the first half of 2017, after oil prices recovered.¹⁶

The other main concern of Omani policy-makers is the reduction of the national economy's dependence on foreign labourers and the "Omanisation" of the workforce. Instrumental in this matter was "the repositioning of the private sector as the engine of economic growth and generating employment."¹⁷ The challenge is indeed crucial. As a result of past very high levels of fertility and high demographic growth rates since mortality decreased in the 1970s, Oman is a "young" society: until 1990, at least 45 per cent of the population was below 15 years of age. Even if a sharp decrease in fertility could be witnessed until the late 2000s¹⁸ that lowered the share of the young age groups in the total population to around 27 per cent,¹⁹ the numerous generations born in the 1970s and 1980s are now on the job market. Moreover, as education levels have improved spectacularly since the 1970s, every year almost 30,000 students successfully complete their secondary schooling and are ready to enter the job market. Yet, most find it difficult to get a job: "the reason for this is the lack of vocational/higher education and/or the lack of practical work experience compared to expatriate labourers working in similar positions."²⁰ Indeed, implementation of the economic diversification and rationalisation plan created a gap between private sector labour needs and expectations of young Omanis, who, like young people elsewhere in the region, would stay unemployed if no opportunities were offered in the government sector. From its onset in the mid-1990s, Oman Vision 2020 had outlined specific quantitative targets for the indigenisation of the workforce. These included expanding the proportion of Omanis in the labour force from 17 per cent of the total population in 1995 to 50 per cent in 2020; doubling the rate of female participation in the labour force from about 6 per cent in 1995 to 12 per cent by 2020; and lifting the Omanisation ratio from 68 per cent in 1995 to 95 per cent in 2020 for the public sector and from 15 per cent in 1995 to 70 per cent in 2020 for the private sector. Some advancements can be witnessed, especially concerning the female workforce, for instance in retail trade. Certain economic sectors were also successfully localised (oil and gas as well as banking sectors, for instance).²¹ However, Omanisation measures were never fully enforced and youth unemployment rates remained high. They were estimated to have reached "approximately 15 per cent and above 30 per cent in the youth segment" in the early 2010s.²²

In such a context, the political uprisings which shook the Arab world starting at the end of 2010 did not spare the Sultanate. Oman witnessed popular demonstrations protesting the corruption among ruling elites, inequality in the redistribution of resources, difficulties in accessing employment opportunities, and stagnating salaries. Migrant workers were also explicitly targeted by these protests: some slogans accused the regime of keeping employment opportunities for its allies, the inhabitants of the Sultanate's capital Muscat, as well as foreign labourers. Xenophobic statements even alleged "Indian colonisation" of Oman and criticised the privileges granted to foreign managers by the Omani business class, while calling for a total Omanisation of the country's top economic positions.²³ In response, 50,000 public sector jobs were immediately created for Omanis, and the minimum wage was raised to OR200 (around \$500) in the private sector.²⁴

Consequently, Omanis' unemployment rate dropped from 15 per cent in 2011 to 5 per cent in 2013 but started rising again steadily afterwards, as large numbers of new graduates began entering the job market. Unemployment today is very high, especially among the youth. All in all, 54,000 Omanis were said to be looking for jobs early 2017, of which nearly 33,000 were university graduates. Official Omani youth (aged 15-29) unemployment rate reached a stunning 37 per cent for males and 63 per cent for females in 2017.²⁶

Much voluntarism has been shown in reducing nationals' unemployment and in implementing the Omanisation process launched in 1988 with the establishment of the Omanisation Committee and inscribed in the Labour Law.²⁷ The minimum salary was raised in 2013, to OR325, in order to attract more young nationals to the private sector. The Council of Ministers in February that same year decided to put a cap on foreign workers to 33 per cent of Oman's population. Other laws designed to promote local employment were discussed, such as a new taxation on foreign worker remittances, by the Economic and Financial Committee of the Shura Council.²⁸ The Ministry of Manpower announced that from March 2014, it will not entertain any transactions regarding any facility in the private sector that does not have a national workforce.²⁹ However, the Omanisation drive gained momentum late 2016. The Minister of Commerce and Industry put pressure on private companies to enact the earlier Omanisation target of 35 per cent of their workforce. Failing to comply with Omanisation objectives would result in losing state benefits granted to private companies.³⁰

Bans on the hiring of foreign workers in the private sector were imposed. A six-month freeze of expatriates' recruitment in the cleaning and construction sectors for small companies, which officials claim facilitate visa fraud, was implemented in 2013³¹ and extended in 2014.³² Another temporary, six-month freeze on hiring foreigners in ten different industries (including media, information technology, marketing, accounting, management, medical professions, insurance and airlines) and 87 different job titles was enacted in January 2018.³³ This was meant to "create vacancies for Omanis looking for jobs."³⁴ The recruitment ban was extended for another six months in July 2018.³⁵

Following demonstrations in which unemployed young nationals called for greater employment opportunities,³⁶ Oman's government also announced it would create 25,000 new jobs for nationals between December 2017 and the middle of 2018, 60 per cent of them in the government sector. It also aims to open 40,000 to 50,000 jobs each year for the next five years – half of them in the private sector. The Manpower Ministry started pushing for young Omani job-seekers to replace expatriates in private sector companies³⁷ and took action in April 2018 against some companies for not hiring Omani citizens. The ministry planned to stop issuing new work permits for expatriates in those companies and work permits for current expatriates would not be renewed after their contracts expired. The Omanisation campaign resulted in more than 115,000 foreign workers leaving Oman between March 2016 and March 2018, sparking fears of a property crash in the country.³⁸ More so, highly-paid expatriates are now targeted as companies seek to limit their expenditures.³⁹

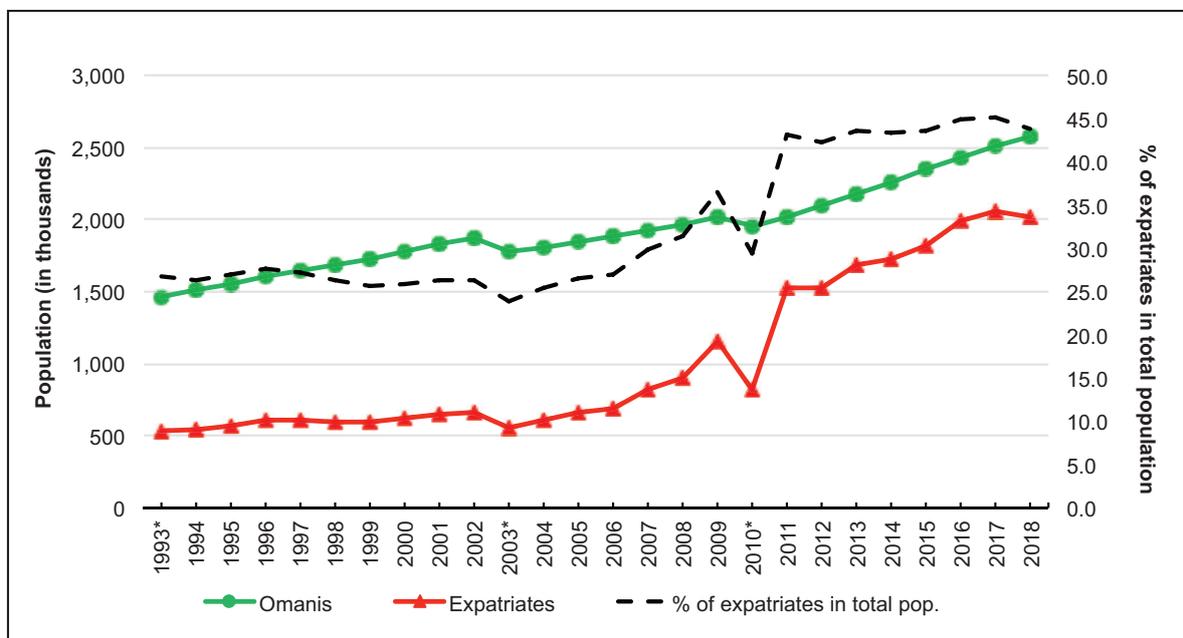
Meanwhile, foreign workers and residents in irregular administrative situation are increasingly criminalised. A massive deportation campaign⁴⁰ was conducted late 2010, after several months of amnesty. Seventy thousand undocumented labourers, mainly from the Indian subcontinent, left the country or

were later deported following massive rounding up operations. In 2013, more raids and inspections led to the apprehension of over 13,000 undocumented workers and the cancellation of over 16,000 visas.⁴¹ Some 47,000 irregular workers and violators of the residency law, mostly from Bangladesh, were arrested in 2015 and 23,000 others were deported.⁴² Regular inspections to detect undocumented migrant workers and ensuing deportation have continued until today.⁴³

INWARD MIGRATION

Stocks

Figure 1: Omanis and expatriates in total resident population (1993-2018)



*Censuses.

Source: NCSI and General Directorate for Civil Status (mid-year figures).

As of November 15, 2018, estimates of the Sultanate’s total population stood at 4,655,366, of whom 2,047,690 (44 per cent) were foreign nationals.⁴⁴ The 1993 census, the first population census ever conducted in Oman, gave a total population figure of 2,017,643, with foreign residents accounting for 26.5 per cent of the total. The second Omani census, conducted in December 2003, estimated the total population at 2,340,815, of which 23.9 per cent were foreign residents. In December 2010, the last census conducted to date counted a total of 2,773,479 residents, of whom 816,143 (29.4 per cent) were foreign nationals.⁴⁵ The evolution of population figures since 1993 as displayed in Figure 1 shows that in Oman, like in all other GCC states, the numbers of foreign nationals rose rapidly during the 2000s. This is consistent with the hike in oil prices and ensuing economic upsurge witnessed in the region during

the decade, which stimulated infrastructural development and, hence, manpower needs. Since 2017, however, the number of recorded expatriates started decreasing.

The drop in the figures of foreign nationals counted during the 2010 census suggest some inconsistencies in the population data. As said earlier, the late onset of a comprehensive and ambitious infrastructural development process (1970) explains why the Sultanate has only a recent history of recording population movements. Yet, the country has caught up and set up a modern statistical apparatus from scratch: within the 1990 to 2010 time-span, Oman evolved from “an absence to a hyper sophistication” of population statistics.⁴⁶ However, Figure 1 shows that the population estimates drawn for intercensal periods (1994–2002 and 2003–2009)⁴⁷ built respectively on the basis of 1993 and 2003 census results and do not match the census results for 2003 and 2010. In particular, the gap is huge between the numbers of expatriates actually recorded during the 2010 census (816,143), and the number expected on the basis of the intercensal yearly estimates (in the range of 1,162,000).⁴⁸ Three scenarios may explain such shifts in numbers: 1) the 2003 and 2010 censuses underestimated population numbers; 2) intercensal estimates inflated the figures of Omanis, and mostly of foreign residents; 3) a sizeable number of the latter left Oman the years the censuses took place.

- 1) The use of the latest technological innovations at every step of the three census operations, from interviewers’ training to data collection, loading, and processing⁴⁹ has been widely acknowledged.⁵⁰ In 2003, in particular, Oman became the first country in the world to equip interviewers with Personal Digital Assistants (PDA) devices.⁵¹ Census-takers were numerous and well-trained, a thorough information campaign in every press organ ensured the cooperation of the population, public institutions were mobilised (schools, the Army, for instance) and the Sultan himself was directly involved. Detailed results of the 2003 census were released within less than a month, a sign of confidence in the reliability of the data. In 2010, by contrast, even though technological innovations were more advanced than in 2003,⁵² a number of organisational and informational drawbacks were reported in the press and among government officials to have affected the validity of the census results.⁵³ Indeed, the sharp drop in the figures of foreign residents in the 2010 census results raises questions.⁵⁴ It effectively contrasts with other sources available for the post-2003 period: the intercensal estimates as well as the newly-established civil registration system.
- 2) Intercensal estimates (1994–2002 and 2004–2009) are drawn using the components method.⁵⁵ However, before 2004 and the creation of the Directorate General of Civil Status (a public body in charge of civil registration),⁵⁶ the systematic and comprehensive registration of births and deaths and, hence, knowledge of the age structure of the total population, was far from complete.⁵⁷ Therefore, it is likely that intercensal estimates of Omani and non-Omani populations between 1994 and 2002 are not fully accurate. As regards the period 2004–2009, intercensal estimates of the foreign residents’ population are based on the 2003 census results, considered to be of high quality as described earlier. Therefore, it is likely that the Civil Registration System provides more accurate estimates of the numbers of Omanis and non-Omanis than Census 2010. The figure of expatriates in 2010 is probably closer to 1,160,000 as estimated from the Civil Registration records for 2010, than to the published figure of 816,173. NCSI’s publications of the figures of residents are currently based on these administrative data, i.e., the Civil Registration records.

- 3) Nonetheless, the deep drop of figures of foreign nationals recorded during the 2010 census held in the month of December may also be due to the aggressive police operations conducted during the year. As mentioned in the Introduction, 70,000 irregulars were deported that year. Moreover, many other undocumented foreign nationals may have been hiding from census operations for fear of being deported too. The police crackdown against illegal sojourners in the year of census may thus partly explain the underestimation of foreign residents in 2010.

As of mid-2017, expatriates were estimated to number 2,054,594. Asian nationalities dominated numerically among them. Indian and Bangladeshi nationals alone made up almost three-quarters (72.3 per cent) of all resident expatriates that year (Table 1). Arab nationalities are much less numerous and the largest national group among them (the Egyptians) does not make up more than 2.3 per cent of all foreign nationals, with 47,000 residents in Oman. Also noteworthy is the diversification of nationalities residing in the Sultanate: nationals from African countries (Tanzania and Uganda) joined other, mainly Asian nationalities. Diversifying the source of recruitment of labourers is a strategy used in several Gulf countries to subvert claims of abuses and demands for better salaries from numerous national groups. Besides, demand for new, cheap and docile workforce in the Gulf States meets poor African countries' growing needs (or perception thereof) for emigration outlets.⁵⁸

Table 1: Oman's foreign resident population by country of citizenship and sex ratio (selected nationalities, mid-2017)

	Total Foreign Residents		Sex Ratio (men/100 women)
	Number	%	
India	766,735	37.3	706
Bangladesh	718,856	35.0	1,654
Pakistan	268,868	13.1	1,166
Philippines	45,213	2.2	41
Indonesia	14,155	0.7	5
Sri Lanka	20,003	1.0	50
Nepal	16,580	0.8	166
Uganda	20,886	1.0	1
Tanzania	17,077	0.8	11
Ethiopia	13,572	0.7	1
Egypt	46,970	2.3	174
Other nationalities	105,679	5.1	135
Total	2,054,594	100.0	515

Source: NCSI, Population Statistics, Issue 7, 2017.

African nationals in Oman are quasi-exclusively women (one Ugandan and one Ethiopian male for hundred women among these nationals, for instance), like among Indonesians (Table 1). Filipinos and Sri Lankans are also mostly females, though not only. On the other end, Bangladeshi and Pakistani nationals display stunning sex ratios of ten or more men for every woman resident. The imbalance is also

great among Indian nationals (7 men per one woman on average). Arab and “other” populations, among whom are Westerners, display a more balanced sex ratio.

A more balanced sex ratio in their total population indicates that Arabs and Western nationals (and Indians, to a lesser extent) are more likely to reside with their families in the Sultanate than other Asians and Africans are. As a matter of fact, in 2010, the census emphasised that children aged 0-14 made up about one-third of total GCC and non-GCC Arab populations. Among Asians as a whole, they made up only 8 per cent. Until 2013, a foreign labourer was able to sponsor his dependents on a family reunification visa, on the condition that his monthly income would be OR300 and above. In Oman, like elsewhere in the GCC, wage differentials by nationality within companies and in each profession are not illegal. Westerners usually earn on average the highest salaries, followed by Arabs and then Asians.⁶⁰ Where available,⁶¹ the distribution of professions and income levels by regional origin highlights that Arabs, as a whole, are often employed in the upper and middle echelons of the occupational scale, below the Westerners. This guarantees them the possibility of bringing their families over and of settling for longer periods in their GCC host countries. This “racialised” labour market indeed entails discrimination and inequalities beyond the divide nationals/non-nationals.

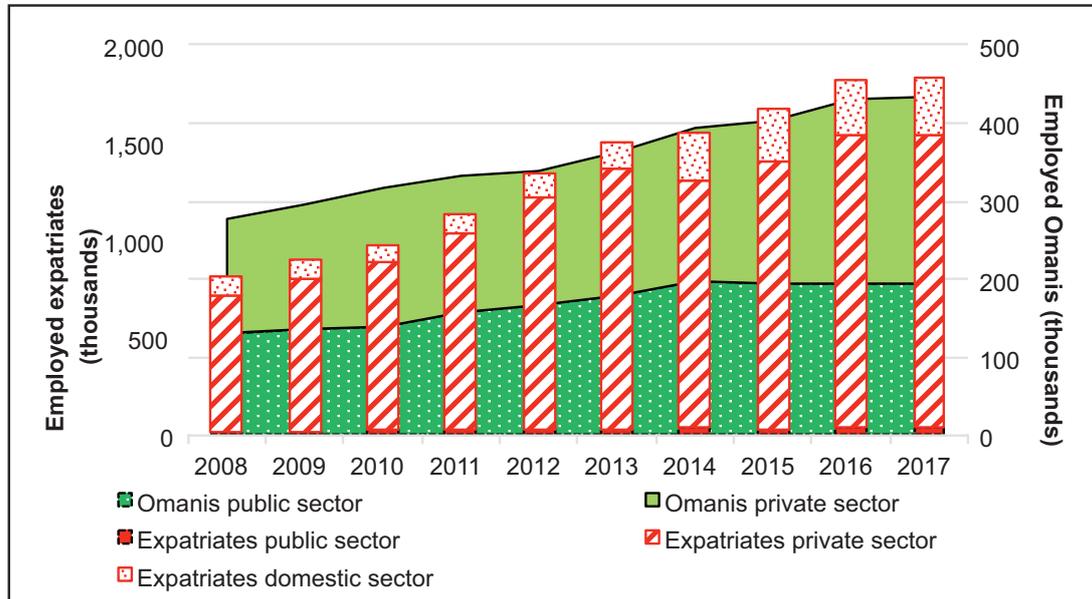
As of October 2018, employed foreign nationals numbered 1,797,613, while all foreign residents numbered 2,051,684. This suggests that 254,071 expatriates, or around 12 per cent of foreign residents, were family dependents.⁶² Even though some variations exist by regional and national origin of expatriates, the bulk of foreign residents in Oman are indeed workers.

Expatriates made up 81 per cent of the total workforce (all sectors) in 2017. By and large, expatriate labourers in Oman are predominantly males (88 per cent or 723 men for 100 women), relatively young (mean age is 35 years), and little educated (78 per cent of men and 75 per cent of women have below-secondary level education as of October 2018),⁶³ which reflects the characteristics of the numerically-dominant group within the expatriate population. Indeed, the overwhelming majority of workers come from the Asian subcontinent: Indians, Bangladeshis, and Pakistanis together make up 86 per cent of the total workforce and 93 per cent of the male workforce. Among female labourers, Indians, Filipinas and Ugandans dominate, making up respectively 22, 16 and 15 per cent of the female workforce. The number of Ugandan labourers, almost all of them females, has increased by 39 per cent since October 2017.⁶⁴

Expatriates made up only 15.7 per cent of the 232,063 government sector’s labourers mid-2017. Expatriates in the sector are usually highly educated: 66 per cent of them held a university degree (63 per cent among males and 71 per cent among female expatriates), as compared to 49 per cent of the Omanis employed in the same sector and 36 per cent only among Omani males. Arab labourers are also comparatively more numerous in the government sector than among the total workforce: they made up almost a half (44 per cent) of all expatriates working for the Omani government in 2017.⁶⁵

Expatriates made up 86 per cent of the 1,741,496 labourers recorded in the private sector mid-2017.⁶⁶ Most recent data indicate that 80 per cent of all foreign workers were employed in the sector in October 2018, 89 per cent among foreign men and 18 per cent among females. The latter were most often in the domestic sector (72.5 per cent). Data from the census of 2010 described the domestic workers’ socio-demographic profile that year: 35 per cent were from Indonesia, 29 per cent from India, and 12 per cent from the Philippines; more than a half were in the age group 30-44 (55 per cent). The vast majority had below secondary education (90 per cent) and most (70 per cent) were married.⁶⁷

Figure 2: Omanis and expatriates by sector of employment (public, private and domestic) (2008-2017)

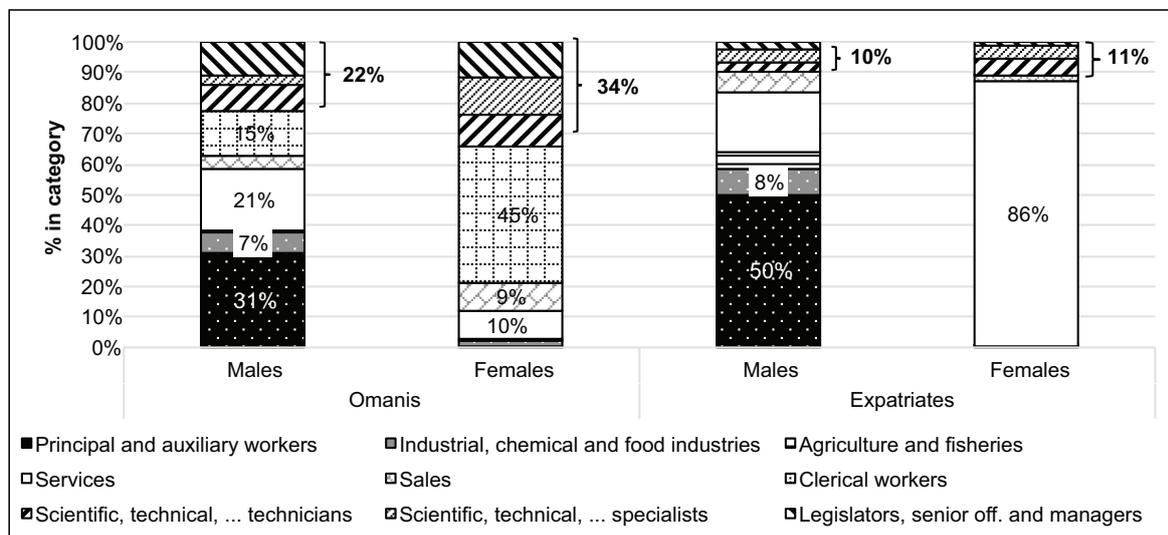


Source: NCSI. Statistical Yearbooks, 2009 to 2018.

The movement of stocks of Omanis and expatriates by sector of employment since the late 2000s (Figure 2) illustrates the government's response to the unrest that erupted in the country in 2011, i.e., supplying public employment opportunities. Yet, the number of locals in the public sector has been stagnating since 2014. Figure 2 also indicates the regular increase of the absolute numbers of Omanis employed in the country's private sector. The number of expatriates in that sector increased even more rapidly: the annual growth rate of expatriate labour in the sector peaked to 21 per cent in 2007 and 2008, before the financial crisis of 2008. The growth rate of the foreign labour force still stood at 16.5 per cent in 2012. Since then, however, the expansion of the foreign workforce in the private sector has been slowing and dropped to a rate of 0.4 per cent for the period 2016-2017. Unlike the public and private sectors, the domestic sector registered a constant increase in the number of employed expatriates. These numbered 292,881, males and females, mid-2017.

As of late 2018, 37 per cent of foreign men employed in the private and domestic sectors⁶⁸ worked in construction, a 9.2 per cent decrease since October 2017, and 15 and 13 per cent were in the "retail and trade" and "manufacturing" sectors, respectively. Among women, 4.3 per cent worked in the education sector, while the trade and health sectors each employed 3 per cent of them. Yet, the bulk of foreign women (79 per cent) worked in domestic activities.⁶⁹

Figure 3: Employed Omanis and expatriates by occupation and sex (private and domestic sectors, 2018)



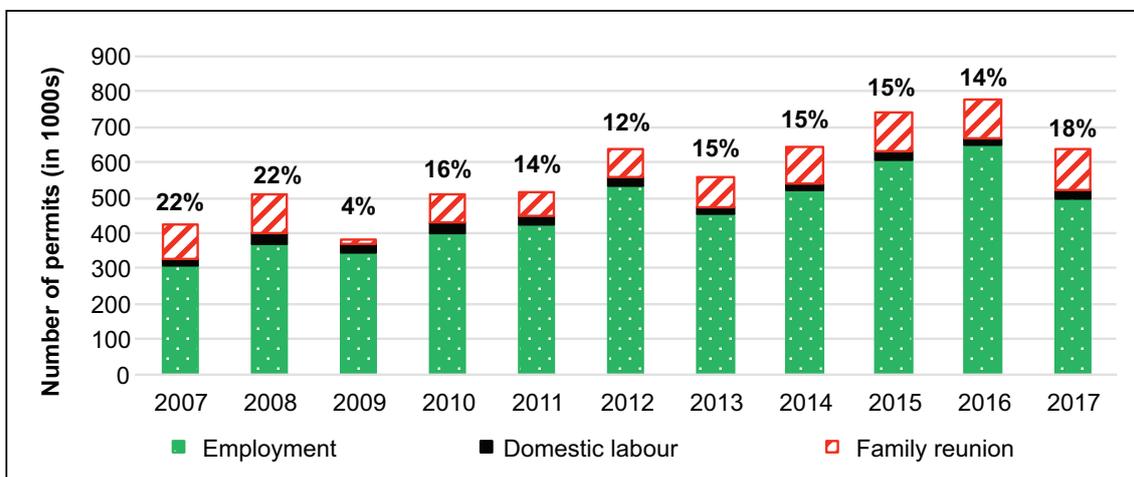
Source: NCSI, Monthly Statistical Bulletin, November 2018.

As regards their occupational structure, expatriates in Oman indeed often perform low-skilled professions, in line with the generally low level of education noted previously for the bulk of the labour force outside the government sector. Most male expatriates in the private and domestic sectors (58 per cent) were in blue-collar occupations, industry or handicraft professions in 2018, while the overwhelming majority of females were in occupations related to services (86 per cent). Yet, it should be noted that year-on-year figures of expatriates employed in the two lowest categories of occupations were markedly down by 6 and 7 per cent from twelve months earlier, in October 2017.⁷⁰ Around 11 per cent of expatriates only were involved in highly-skilled occupations,⁷¹ men and women alike. Interestingly, very few expatriates were employed as clerical workers in 2018. This confirms the impact of Omanisation policies and measures described in the Introduction, which reserve private sector’s white-collar professions to local job seekers. Notwithstanding the 38 per cent male nationals employed in low-skilled occupations and the fact that expatriates still dominate numerically among highly-skilled labourers,⁷² 22 and 34 per cent of employed Omanis (respectively, for men and women) were indeed holding “highly-skilled”, white-collar professions; most Omani private sector female labourers (45 per cent) were also occupying clerical positions that year. The overall decrease in the figures of expatriates since 2016, and the drop of the relative share of those employed in mostly low-skilled, labour-intensive sectors such as construction, as was noted earlier, both suggest that Oman did enact drastic policies aiming to upgrade the country’s workforce and create more and better opportunities for local job-seekers.

Flows

These conclusions are confirmed by recent data on workforce flows. Statistics of permits delivered (net inflows⁷³) indeed highlight the drop in the net numbers of residency permits delivered in 2017, after a period of constant increase since 2012, despite the low oil prices characterising these years.⁷⁴ This is due to a drop in residency permits delivered to workers (residency for the purpose of employment), which matches the decrease in the stocks of foreign workers noted in the previous section. Figure 4 indicates, conversely, that the number of residence permits granted for family reunion has been increasing since 2011, from 72,400 that year to 115,000 in 2017; their relative share thus expanded after 2016, despite the start of the contraction of job opportunities offered to expatriate labourers in the private sector that year.

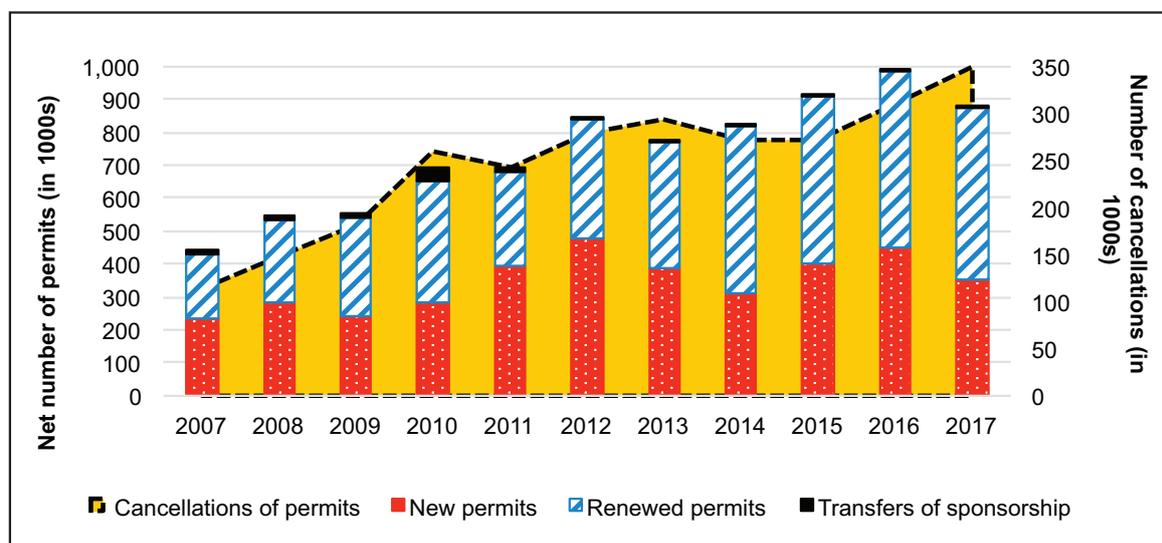
Figure 4: Net flows of foreign residents to Oman by purpose of residency permit and share of family reunion permits in total (2007-2017)



Source: Directorate General of Civil Status, Royal Oman Police.

Family reunion had become a direct target of public policy in the tense aftermath of the financial crisis of 2008 and the 2011 civil unrests, and some families allegedly left the country because of their failure to secure family reunion at the time.⁷⁵ Measures constraining family reunion were indeed announced by the Directorate-General of Passport and Residences at the Royal Oman Police (ROP) in 2013, which imposed a doubling of the monthly minimum income allowing expatriates to be granted a family reunion permit, to OR600 (US \$1,558)⁷⁶ monthly. Family dependents under family residence visas were also barred from taking up employment. Officials justified limiting family reunion as necessary to better manage the labour market and create more job opportunities for Omanis. However, the increase in the number of family dependents' residencies over the period confirms that expatriate workers in Oman are comparatively more skilled, hence their ability to overcome the financial constraints to family reunion.

Figure 5: Flows of foreign labourers to Oman by status of residency permits (2007-2017)



Source: Directorate General of Civil Status, Royal Oman Police.

Closer examination of the inner distribution of residency permits delivered to workers alone suggests another overhaul of the labour market in Oman. The number of labour visas more than doubled between 2007 and 2016: this probably indicates the difficulty of “Omanising” the labour force in every sector, especially in labour-intensive sectors of activity such as construction, which directly concern Oman’s infrastructural development plans. However, until 2011-2012, the number of new visas and their relative share in all the residencies issued was higher than that of residencies’ renewals. Cancellation of permits also more than doubled between 2007 and 2010. This is in line with recruitment policies serving labour-intensive, low-skilled activities, necessitating large numbers and a rapid turnover of short-term labourers. Transfers of sponsorship also went up during this period (42,228 during 2010 alone), probably a consequence of the measures conducted against foreign labourers in irregular situation in the country. Since the turn of the decade, however, most residencies granted have been renewal of permits issued to workers already in the country. This suggests a change in labour and recruitment policies towards rationalising the workforce by retaining the workers already trained. Measures aiming at curbing the hiring of new foreign workers and at fighting irregularity were indeed taken since 2010, with several bans on recruitment of new workers in certain sectors as indicated in the introductory section. These may well explain the drop in the issuance of new visas noticed in Figure 5.

Foreign labourers’ mobility on the labour market was also limited by some decisions announced by the government. Although since 2006, “expatriates no longer need the permission of their current employer to switch to a new one,”⁷⁷ the Royal Oman Police announced a two-year re-entry ban on foreigners willing to return to the Sultanate after failing to complete two years with his/her previous sponsor in Oman. Employment visa transfers for foreign workers who have not completed two years of their work contract with their company also became forbidden.⁷⁸ From a peak of 42,228 sponsorship changes completed in 2010, the figure reached a low of 196 in 2016. Limiting workers’ mobility was said

to aim at “preventing foreign workers from job-hopping prior to the completion of their contracts and to prevent employers from poaching employees from competitors.”⁷⁹

As of 2017, however, another phase seems to have started, with a drop in the number of first-time residencies for employment (from 450,028 in 2016 to 351,293 in 2017), as well as in residencies’ renewals (from 532,359 to 522,263). Cancellations of residencies (following the end of the worker’s contract, resignation or lay-off) also went up since 2015. More likely, the enforcement of sectoral Omanisation quotas ⁸⁰ and the mandatory hiring of Omani nationals to replace expatriates in all private sector businesses are comparable to Saudi Arabia’s “Nitaqat” programme of nationalisation of the workforce, which also gained momentum in 2017-2018.

Similarly, the deportation campaigns and police operations conducted in the Sultanate since 2010 echoed the crackdowns on irregular workers in the Kingdom since 2013. Arrests of workers in irregular administrative situation went up during the current decade, from 7,694 in 2010 to 22,000 in 2016. Of these, 74 per cent (16,296 persons) were from Bangladesh alone. From 4,500 in 2010, deportations also gained momentum to reach 11,900 in 2016. Another 10,000 cases of irregulars were under examination that year.⁸¹ In Oman, like in Saudi Arabia, business owners as well as expatriates whose jobs are at stake are thus deeply affected by the government’s steps to alleviate youth unemployment and discontent.

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3. <http://www.mog.gov.om/Portals/1/pdf/oil/history-Oil-Gas-en.pdf>.
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5. Unlike with the Eastern African countries. The eviction of the Al-Busai'di dynasty and Arab settlers took a violent form during 1964's Tanzania revolution. Another wave of Arab refugees originating from the region also fled the war in the African Great Lakes region in the 1990s [Marc Valeri, *Oman: Politics and Society in the Qaboos State* (Oxford: Oxford University Press, 2013), pp 19-22].
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7. Some authors state: "There was a rapid increase in expatriate labor force between 1991 and 1996. The Iran-Iraq War (1980-88) and the 1991 Iraq War helped to attract migrants to this country." (K.C. Das and Nilambari Gokhale, "Omanization Policy and International Migration in Oman," MEI, February 2, 2010).

8. <http://www.omansultanate.com/economy.htm>.
9. The only existing estimation of 500,000 persons in 1908, drawn by Lorimer, is probably too high. If accurate, the estimate would signify a zero per cent population growth rate until 1993. See Safar 2015, p. 127.
10. A Household Survey was conducted in 1975 in parts of the country only and two fertility surveys were conducted in 1989 and 1995. The first Five-Year Socio-Economic Development Plan covered the period 1976-1980. See O. Winckler, *Arab Political Demography. Population Growth, Labour Migration and Natalist Policies* (Brighton/ Portland: Sussex Academic Press, 2009), pp. 20-21.
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13. For example, the Mina Al Sultan Qaboos project in Muscat's historical Port Sultan Qaboos, a \$1 billion hospitality and residential development project (Claudine Coletti, "How Oman Is Transforming to Stimulate Growth," *Forbes Middle East*, August 26, 2018, <https://archives.forbesmiddleeast.com/en/how-oman-is-transforming-to-stimulate-growth/>).
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18. The Total Fertility Rate (TFR) of Omani women aged 15-49 was six children per women on average in 1995, dropping to a low of 3.1 children per women in 2007. Since then, data suggest a continuous increase of the TFRs (see NCSI, *Statistical Yearbooks*, given years).
19. Safar, *Mariage et procréation à Oman et au Koweït*, p. 230.
20. Das and Gokhale, "Omanization Policy and International Migration in Oman." Other explanations for difficulties encountered by Omani youth to access available positions pertain to their reluctance to perform certain, mainly manual, tasks.
21. Coletti, "How Oman Is Transforming to Stimulate Growth."
22. Ennis and al-Jamali, "Elusive Employment, Development Planning and Labour Market Trends in Oman," p. 3.
23. Jihan Safar, "La question des migrants à la lumière du printemps arabe dans le Sultanat d'Oman," (Paper presented in the conference *Faits migratoires et mouvements sociaux dans le monde arabe*, Paris, Moulay Hicham Foundation, June 2011).
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It is worth noting, however, that raw figures are unavailable in the present report, which stops us evaluating the impact of unemployment on the age group as a whole. Official publications usually provide figures aggregated for Omanis and non-Omanis. No data is available on inactive persons in the country either.
27. The 2012 Omani Labour Law states: “Each employer that does not comply with the stipulated Omanization percentages shall be punishable by a fine of not less than two hundred fifty (250) and not more than five hundred (500) Omani Rials for each Omani employee that should have been employed. The employer shall rectify the Omanization percentage within six months from the date the violation was detected. Penalty shall be doubled upon the repetition of the violation.” Sultanate of Oman, Ministry of Manpower. “Oman Labor Law 2012.” Muscat, Oman: Ministry of Manpower, 2012. Part 10, Article 114; Refer to Julia Craig Romano and Lee Seeger, “Rentierism and Reform: Youth Unemployment and Economic Policy in Oman,” IMES Paper Capstone Series, The Institute for Middle East Studies, The Elliott School of International Affairs, George Washington University, May 2014, p. 43.
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29. <http://www.timesofoman.com/News/Article-29327.aspx>.
30. These include free commercial lands, training and low-interest loans (<https://www.thenational.ae/world/anger-grows-among-educated-but-unemployed-young-omanis-1.57016>).
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46. Safar, *Mariage et procréation à Oman et au Koweït*, pp. 126-127.
47. Drawn from past population movements (births, deaths, emigration and immigration).
48. Using linear regression method.
49. For a description of the techniques used during the three censuses, see, for example: <http://unstats.un.org/unsd/demographic/meetings/Conferences/Korea/2012/docs/s07-5-1-Oman.pdf>
50. Such exemplarity actually propelled Mr Ali Ben Mahboob Al-Raisi, Director General of the Social Statistics and Census Administration at the Ministry of National Economy to the Chairmanship of the UN Statistical Commission for two consecutive years in 2010 and in 2011 (<http://unstats.un.org/unsd/statcom/table-chairs.pdf>). See *Safar Mariage et procréation à Oman et au Koweït*, p. 126.
51. With access to satellite maps and direct transmission of information to data processing computers, http://unstats.un.org/unsd/demographic/meetings/egm/CensusEGM04/docs/AC98_8.pdf.
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53. Among which: technical mishaps in the counting of the housing units preliminary to the start of the census, a delay in the start of operations, an over-mediatization of the census which may have affected the population's commitment and participation. See *Safar, Mariage et procréation à Oman et au Koweït*, pp. 138-142.
54. It is also puzzling that most of 2010's census results, which were published in numerous thematic studies, usually appear as percentages, not raw data that could be processed by researchers.
55. The components method projects the various components of population growth (fertility, mortality, migration) separately by sex, age group, etc.
56. The civil registration is based on the civil status system and is maintained by the General Directorate of Civil Status (DGCS), a part of the Royal Oman Police. Since 2004, registration of all vital events taking place in the Sultanate (births, death, marriages, and divorces) in the civil register is mandatory for Omanis and residents of the Sultanate. The DGCS also issues and keeps records of identity cards for Omanis and residence cards for foreign residents.
57. <http://unstats.un.org/unsd/vitalstatkb/Attachment75.aspx>.
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59. US \$779, or 691 Euros as of May 2015.

60. It is usually justified by the variation in reservation wages by workers' origin, i.e., salaries in the Gulf must be higher than in expats' home country to be attractive, but the increase only needs to be proportionally higher. For a systematic survey of average salaries by profession, GCC country and group of nationalities, see Robert Anderson, "Revealed: The Gulf Business 2015 Salary Survey," *Gulf Business*, vol. 19, Issue 11, March 23, 2015, http://gulfbusiness.com/2015/03/revealed-gulf-business-2015-salary-survey/#.VfwSg_ntmko. On Oman, see GLMM's re-processing of Gulf Business' data: <http://gulfmigration.org/oman-a-comparison-of-average-monthly-salaries-received-by-nationality-group-of-workers-in-us-selected-professions-2015/>.
61. In Kuwaiti and Bahraini statistics, as well as in Dubai's Labour Force Surveys, for instance.
62. NCSI, *Monthly Statistical Bulletin*, November 2018, https://ncsi.gov.om/Elibrary/LibraryContentDoc/bar_November%202018_58c1deb8-e492-4b1e-bb89-06902e3264c0.pdf. Data are taken from the Civil Registration records.
63. Five per cent of all expatriate labourers (5 per cent of males, 8 per cent of females) held a university degree in October 2018. See NCSI, *Monthly Statistical Bulletin*, November 2018.
64. NCSI, *Monthly Statistical Bulletin*, November 2018.
65. NCSI, *Statistical Yearbook 2018*.
66. NCSI, *Statistical Yearbook 2018*.
67. <http://gulfmigration.eu/oman-a-socio-demographic-profile-of-domestic-workers-2010/>.
68. NCSI, *Monthly Statistical Bulletin November 2018*. Data for the private and domestic sectors are aggregated.
69. October 2018 data (NCSI, *Monthly Statistical Bulletin*, November 2018). Data for the private and domestic sectors are aggregated.
70. The lowest categories of occupations are "Principal and auxiliary workers" and "Industrial, chemical and food industries." The number of expatriates in such occupational categories went down by 6 and 7 per cent, respectively, since October 2017 (NCSI, *Monthly Statistical Bulletin*, November 2018).
71. The three upper categories of occupations: "Administration, Directors and Managers"; "Scientific and Technical Specialists" and "Scientific, Technical and Human Matters Technicians."
72. For instance, 60 per cent of those employed in the top category of occupation ("directors of public administration and business") in private and family sectors in 2017 were expatriates (Statistical Yearbook 2018). This is due to expatriates' numeric domination over locals in the private sector's labour force.
73. All permits (residencies) delivered for all purposes (employment and family reunion) and statuses of permits (new permits, renewing of permits and transfers of sponsorship), minus all permit cancellations for the year.
74. Yet, it is impossible to know if a part of these permits actually served to regularise the situation of undocumented residents.
75. <http://gulfnnews.com/news/gulf/oman/oman-tightens-rules-on-expatriate-workers-1.1231629>.
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About the Author



Françoise De Bel-Air (PhD) is a researcher and consultant based in Paris, France. A socio-demographer by training, she specializes in the demography of Arab countries, especially in the Middle East and the Gulf region. She has been a research fellow at the French Institute for the Near East (IFPO) in Amman, Jordan for several years and a part-time Professor at the Migration Policy Centre, EUI. Her research focusses on political demography, as well as on the demographic and socio-political dynamics in the region: youth, intergenerational and gender relationships, family structures, labour and forced migration, migration and population policies. Her recent publications include Chapter 7 “Exclusion, Mobility and Migration” in the Arab Human Development Report 2016 on Youth and “Blocked Youth’: The Politics of Migration from the SEM Countries before and after the Arab Uprisings.” *The International Spectator* (53): 2018.

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