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Layers of Segmentation in GCCs Labour Markets: How Well do Migrant Women Fare?

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Layers of Segmentation in GCCs Labour Markets: How Well do Migrant Women Fare?

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Abstract: This explanatory note attempts to briefly review the complexity of segmentations prevalent in the private labour markets of the Gulf Cooperation Counsel's member states, based on the relative conditional earnings distributions of workers. We do so while considering the historical evolution of regional economies, and active policies regarding the recruitment of skilled workers. It is shown that in addition to the typical public-private segmentation, the distribution of workers and earnings structures of skilled labour forces within private employment remain prone to several sources of bias. First, temporary economic migrants still constitute the overwhelming majority of skilled labor, which testifies to the shortcomings of existing nationalization policies. Within migrant labour, workers are further segmented in terms of gender and national backgrounds, placing migrant women at the bottom of the earnings distributions. We recommend the revision of current nationalization and migration policies, to adhere more closely to market conditions. Additionally, we encourage the development of merit-based frameworks for hiring and firing workers, independent of national background, and introduce measures that would increase labour mobility from a regional perspective.

Keywords: Gulf Cooperation Council; Labour Market; National & Foreign Labour; Earnings; Decomposition Analysis.

A brief overview of prevalent segmentations:

Market failure, whether in input or output markets, occurs due to a host of reasons including information asymmetries, moral hazard, government intervention and market power. These causes are not mutually exclusive and may underlie persistent market distortions simultaneously. Within the context of Gulf Cooperation Council's (GCC) labor markets, simultaneous distortive forces have over time resulted in complex segmentations within member states' labor markets, with measurable impacts on employment levels of various worker segments, as well as corresponding wage structures.

Among GCC-wide observed segmentations are those related to migration backgrounds, employment sectors and gender, which are layered and intertwined. Economic migrants constitute significant portions of GCC's populations, in many cases the majority. Figure 1 shows that the percentage of migrants ranges from 39% in Saudi Arabia and Oman, to 88% in Qatar.

As a consequence of this demographic characteristic of GCC societies, which is more intimately related to the region's historical economic evolution as opposed to short- or medium-term government labor market interventions, the supply of labor at any particular point in time is characterized by a dominant share of migrant workers.

The demographic composition of the region's labor supply is certainly a fundamental factor explaining the distributions of workers across various economic sectors. The allocation of workers to public or private employment is, nonetheless, directly associated with governments' labor market policies, workers' selection behaviors and labor market participation decisions, Alfarhan (2015).

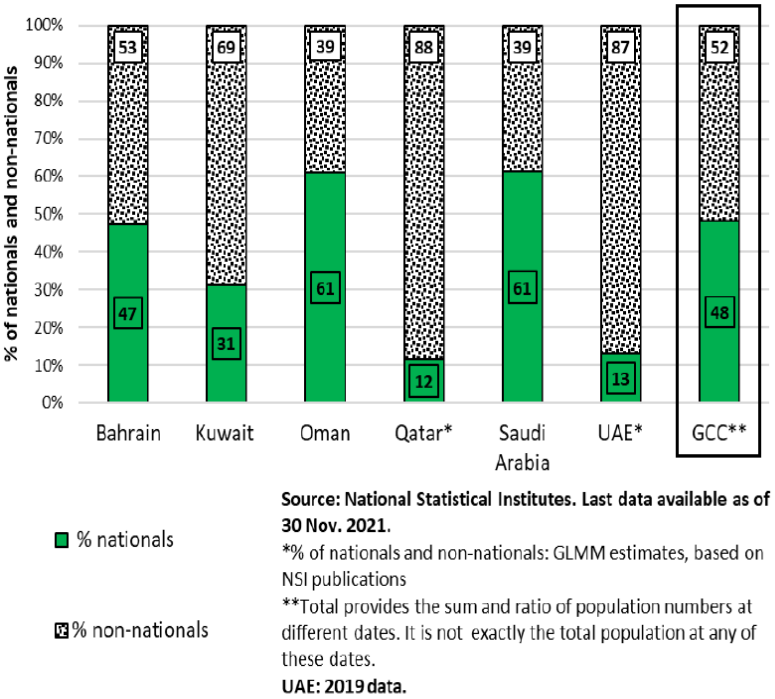

Figure 1: Percentages of nationals and non-nationals in GCC's populations (2020).

Source: https://gulfmigration.grc.net/media/graphs/Figure_1percentageofnationalsnon-nationals%202020.pdf

At the early stages of development, GCC governments were the primary employer of local and migrant workers, with priority granted to the former, contingent on the availability of skills required to kick-off planned economic transformations. The nature of the technical relationship between local and migrant workers at the time was more complementary than substitutive. With time and public resources allocated to the investment in local human capital, the supply of local skill and qualified workers increased, thereby increasing the substitutability between local and migrant workers. This, in-turn, initiated the segmentation where local workers eventually comprised the majority of public labor forces.

Governments also facilitated the emergence of private sectors via promoting local investments, the attraction of foreign direct investments, privatization and easing private employers' access to relatively cheaper migrant labor via supporting sponsorship systems and engagement in bilateral labor agreements with major source countries (Wickramasekara, 2018). Due to historical and cultural ties, geographical proximity and lower relative opportunity costs of migration, economic migrants from the Indian subcontinent, including India, Pakistan and Bangladesh, in addition to the Philippines comprise the majority of private labor forces today. Other sources of skilled migrant workers are surrounding MENA populations such as Egyptians, Lebanese, Jordanians and Palestinians, Moroccans Algerians and Tunisians (Kapiszewski, 2006). Albeit at declining shares through time, skilled workers from more distant Western populations still contribute to the stock of migrant workers in the region, Alfarhan and Al-Busaidi (2019).

Table 1 below shows cross-sectional statistics regarding employment levels and the percentages of migrant workers as a combined group in each of GCC's public and private sectors. Information on UAE is not publicly available.

Table 1: Public vs Private Employment and the Percentages of Migrants in thousands.

Country	Period	Public Sector	% of Migrants	Private Sector	% of Migrants
Bahrain	**2013: Q4**	149.9	25.4	496.1	80.7
Kuwait	**2013: Q4**	439.2	29.6	1314.8	93.2
Oman	**2012: Q4**	378.3	7.3	1362.1	87.4
Qatar	**2012: Q1**	161.7	57.1	1039.5	98.7
Saudi Arabia	**2013: Q4**	3034.2	3.8	8487.5	86.6

Source: National institutes of statistics, latest year or period available as of April 2014.

Data reported in the table do not account for domestic sectors, where the percentages of migrants are close, if not equal, to 100%. Public employment in the GCC is clearly dominated by local workers due to both demand and supply side conditions. On the demand side, public employment of locals was for long episodes considered a right for local populations and a tool for facing unemployment in local workforces. With the fiscal constraints facing most GCC states today, this tool is confined to targeting the growing concern of youth unemployment in particular. On the supply side, local workers favor government jobs for reasons including preferable employment packages, contractual terms and higher perceived social status affiliated with public employment (Ramady, 2013; Alfarhan, 2015). That said, nationalization policies designed to increase the participation of local workers in private employment have long been in place, albeit with limited success (Hertog, 2014; Alfarhan and Al-Busaidi, 2019). Hence, migrants who are employable at lower wages and less favorable employment conditions are found to comprise around 90% of GCC's private labor forces (Randeree, 2012).

Within private employment, there is another layer of segmentation. The percentage shares of the aforementioned groups of Asian, Arab and Western migrants are significantly variant. Confining the discussion to skilled workers, Alfarhan and Al-Busaidi (2019) report those percentage shares as 64.2%, 18.9% and 16.9% respectively. Furthermore, there are considerable within-group differences in terms of nationality and real hourly earnings as shown in Table 2 below. Migrants from the U.K. and the U.S. constitute 35% of skilled Western workers employed in GCC's private sectors, earning on average $46 an hour. Within the category of Arab migrants, Egyptians, Lebanese and Jordanians constitute over 78% and earn $27 an hour. Indian and Pakistani workers comprise 85.6% of Asians workers, earning about $18 an hour.

Table 2: Main Nationality Group and Real Hourly Earnings

Nationality	%	Real Hourly Earnings (2010 US$)
Westerners		
United Kingdom	22.3	46.9
United States	12.7	44.4
France	7.7	42.2
Canada	6.8	46.3
Greece	5.2	34.6
Spain	5.1	36.5
Arabs		
Egypt	37.2	25.7
Lebanon	20.7	28.3
Jordan	20.4	26.1
Syria	6.3	22
Palestine	3	23.5
Tunisia	2.8	21.5
Asians		
India	74.3	18.3
Pakistan	11.3	17.8
Philippines	8.6	11.1
Sri Lanka	2.1	14.1
Malaysia	1.2	35.0
Bangladesh	0.5	14.9

The observed differentials in earnings between the three groups of skilled migrants may, in part, be explained by their relative supplies. The authors also indicate that Westerners face higher opportunity costs of migration, followed by Arabs and Asians, which are monetarily reflected in their migration decision. Additionally, Westerners join GCC's private labor forces with higher levels of job market experience, occupy higher managerial positions and work for larger employers. This, in turn, grants them a comparative advantage in terms of bargaining power.

Yet, another segmentation form that is intertwined with the public/private distributions of workers in terms of migration background is the observed gender labor market segmentation. In general, Figure 2 shows that formal public and private employment levels are considerably biased toward men. GCC-wide, every 100 local women are accompanied by 400 local men, a men-to-women ratio of 4:1. For migrants, this ratio is closer to 7:1. The underlying causes of such gender imbalances in the case of locals are largely reduced to gender differentials in

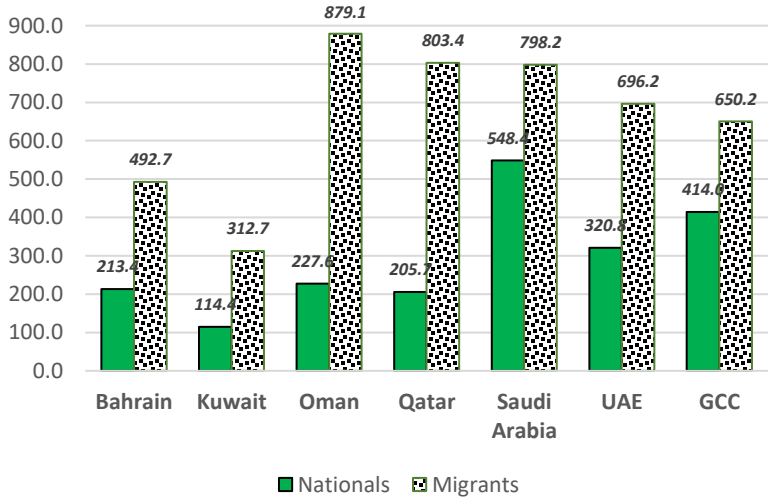

Figure 2: Men employment for every 100 women. Bahrain (2010), Kuwait (2013), Oman (2012), Qatar (2013), Saudi Arabia (2013) and UAE (2009).

Source: National institutes of statistics, latest year or period available as of April 2014.

labor force participation rates, driven by cultural and institutional aspects as opposed to market forces. Saudi women, for example, are mainly employed in public health and education, sectors deemed appropriate for the female labor force (Hertog, 2012). Such aspect is not unique to Saudi Arabia, but extends to a wider regional context, including Jordan as highlighted by Alfarhan (2015). For migrants, the observed gender imbalance is mainly due to gender differences in migration patterns and to relative industry demands. As shown by Alfarhan and Al-Busaidi (2019), migrant workers are mostly men in their early 30s who work in construction (26.3%) and wholesale and retail trade (19.9%). This overlap of segmentations by employment sector, migration background gender has also been documented by Hertog (2012, p. 9), who reports local men-to-women ratios of 2:1 and 15:1 in Saudi Arabia's public and private sectors, based on official 2007 figures.

Migrant women in GCC's private employment:

The previous exposition describes a rather clear and persistent situation, where formal public and private employment in GCC's labor markets is male dominated. Locals are concentrated in public sectors that offer favorable employment terms and working conditions, and migrants are predominantly constituting private labor forces working at less favorable employment terms, including lower earnings. This places privately employed migrant women in particular in a curious spot. The aspect of low employment levels of this group, due to combined adverse conditions on both the demand and the supply side has already been established. Hence, their relative position in terms of labor market earnings merits further investigation.

A technical impediment to such query stems from the general lack of official data on workers' earnings and productivity-related characteristics at the individual level in the GCC. Alfarhan and Al-Busaidi (2020), therefore, revert to an open-source data set shown capable of reproducing publicly accessible aggregates and producing theoretically consistent and empirically meaningful results. Their investigation identifies privately employed skilled migrant women's relative earnings, in comparison to local and migrant men. Their modeling process adopts the decomposition structure introduced by Shamsuddin (1998), and the conditional counterfactual quantile estimation approach of Chernozhukov et al. (2013).

The authors define the three groups of local men (A), migrant men (B) and migrant women (C). Accordingly, the differential in private labor market earnings between local men and migrant women is disentangled into a component due to women's migration background (M) and a component originating from gender labor market discrimination (G). In order to produce these components, the authors estimate the earnings distribution of local men conditional on their own productivity-related characteristics, $\int F_{Y_A}(y,x)dF_{X_A}(x)$, the counterfactual earnings distribution of local men conditional on the characteristics of migrant men, $\int F_{Y_A}(y,x)dF_{X_B}(x)$, the earnings distribution of migrant men conditional on their own characteristics, $\int F_{Y_B}(y,x)dF_{X_B}(x)$, the counterfactual earnings distribution of local men conditional on the characteristics of migrant women, $\int F_{Y_B}(y,x)dF_{X_C}(x)$, and the earnings distribution of migrant women conditional on their own productivity-related characteristics, $\int F_{Y_C}(y,x)dF_{X_C}(x)$. In this process, the earnings distribution of local women is not necessarily an input, which is convenient in the GCC context given the low female labor force participation rates.

It follows that the differential in private labor market earnings between local men and migrant women may be expressed as $\Delta F = \Delta F^M + \Delta F^G$, such that:

$$\Delta F^M = \left[\int F_{Y_A}(y,x)dF_{X_A}(x) - \int F_{Y_A}(y,x)dF_{X_B}(x)\right] + \left[\int F_{Y_A}(y,x)dF_{X_B}(x) - \int F_{Y_B}(y,x)dF_{X_B}(x)\right] \quad \text{...(1)}$$

and

$$\Delta F^{G} = \left[\int F_{Y_B}(y,x)dF_{X_B}(x) - \int F_{Y_B}(y,x)dF_{X_C}(x)\right] + \left[\int F_{Y_B}(y,x)dF_{X_C}(x) - \int F_{Y_C}(y,x)dF_{X_C}(x)\right] \quad \text{...(2).}$$

ΔF^{M} Refers to the earnings differential between local men and migrant women due to migration background alone, and ΔF^{G} refers to the part of that differential exclusively explained by gender. The first term on the right-hand-sides of equations (1) and (2) represent the components due to differentials in productivity-related characteristics within each segmentation and the second terms represent the components due differentials in the returns to observed characteristics. These distributional differences are estimated at the 10th to the 90th percentiles of the earning distributions.

Data comprise annual cross sections during 2010 and 2016, including 7384 privately employed full-time workers in GCC's member states. Summaries of workers' productivity-related characteristics are shown in figures 3 and 4.

As expected from official estimates, Figure 3 shows that migrant men outnumber local men by a ratio of 17:1. In terms of age and job market experience, there are no profound differences between the two groups. Migrant men are on average one year older and possess one additional year of job market experience. In terms of educational attainment and job match however, 5% more migrant men possess a graduate degree, 5% less have lower levels of educational attainment and 21% more migrant men match their job perfectly.

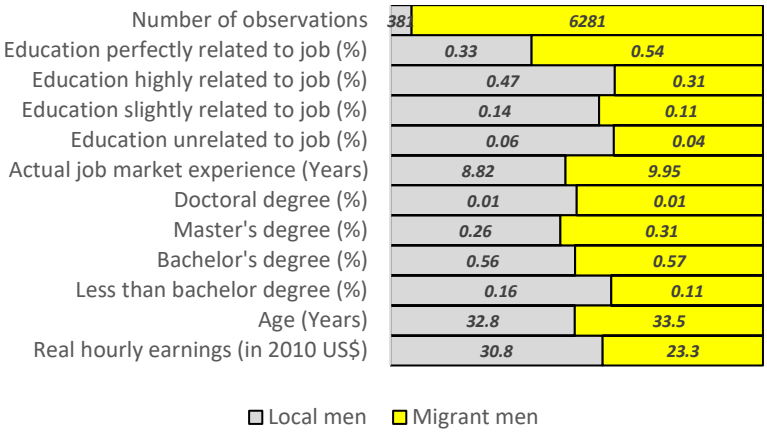

Figure 3: Descriptive statistics of privately employed local and migrant men.

In contrast, Figure 4 shows that migrant women outnumber local men by a ratio of 2:1. They too possess higher levels of educational attainment, and 11% more migrant women work at jobs that match their education perfectly. The two groups are equally experienced and are of same age.

In Figure 3, the aspect of gender is held constant. Despite migrant men being favorably endowed in terms of productivity-related attributes, local men earn a premium of 32.2%. Hence, this this premium is attributable to being of migrant origin, exclusively.

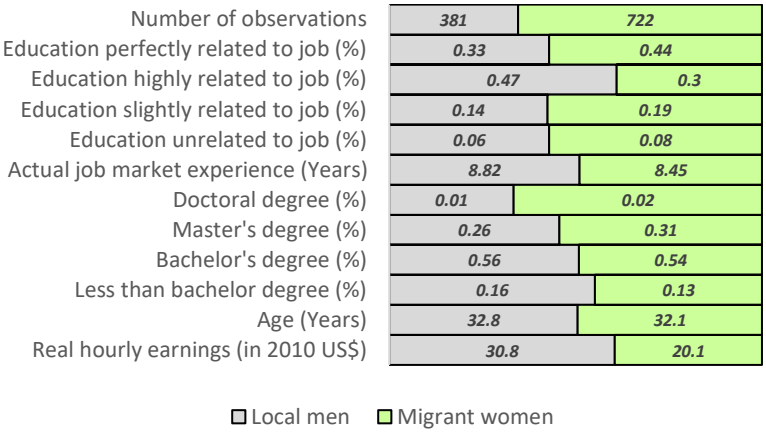

Figure 4: Descriptive statistics of privately employed migrant men and women.

In Figure 4, both migration background and gender vary across groups. Statistics show local men to earn 53.2% more than migrant women. Given the impact of migration in Figure 3, 20% of the hourly earnings differential between local men and migrant women is attributable to gender earnings discrimination alone.

Figure 5 below summarizes the conditional counterfactual quantile decomposition results of estimated hourly earning differentials between privately employed local men and migrant women, $\Delta F = \Delta F^M + \Delta F^G$. Results show that migrant women are at a persistent disadvantage along earnings distributions. Local men earn 65% more than migrant women at the lower end of earnings, which declines to 45% at the higher end.

The solid green bars represent the percentage contributions of relative market returns to productivity-related characteristics, while holding gender constant. That is the difference in the returns to constant characteristics between local and migrant men, hence potential labor market discrimination due to migration background. As shown by the heights of these bars, this effect increases consistently along distributions, which indicates that local workers' premia increase at higher levels of earnings. To word it differently, the relative discriminatory disadvantage of being a migrant in GCC's private labor markets rises with the level of hourly earnings. Such effect is accompanied by an observed increase in relative productivity-related characteristics of migrants, as indicated by the patterned green bars. With higher levels of earnings, migrant workers become increasingly better endowed than locals, which causes migration-induced hourly earning differentials to fall, despite an increasing effect of discrimination.

Likewise, albeit with smaller percentage shares, the solid grey bars show that migrant women get increasingly disadvantaged compared to their migrant men coworkers. The relative shares of gender-induced differentials in the returns to productivity-related characteristics increases from 16% at the 60th percentile to 38% at the 90th percentile of earning distributions. That in spite of the stability in relative

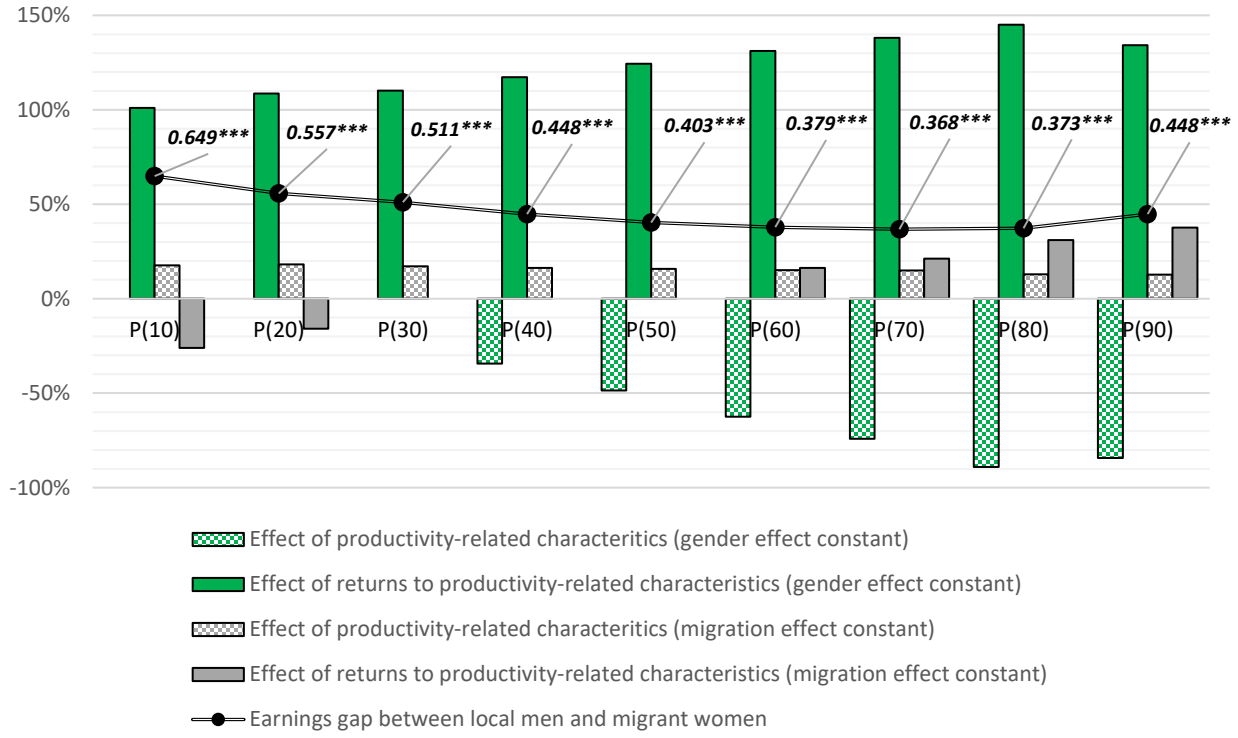

Figure 5: Decomposition of the quantile hourly earnings differentials between privately employed local men and migrant women in the GCC.

*** indicates the differential is statistically different from zero at 1% level of probability.

Note: The missing bars between the 10th and the 50th percentiles indicates that the corresponding effect was found statistically indifferent from zero at 10% level of probability.

productivity-related characteristics between migrant men and women, as shown by the patterned gray bars. This is indicative of gender labor market discrimination, potentially in the form of glass ceilings.

Conclusion

Labor markets in GCC member states are fairly complex and greatly influenced by the evolution of the region's economies. It is therefore difficult to understand prevalent patterns without a deep understanding of the region's history. Prior to the discovery of commercial oil reserves in the 1950s and 60s, populations in the GCC co-existed in tribal and nomadic communities, absent of modern states and institutions. After the discovery of the region's mineral riches, governments formed, and with the aid of the international society, embarked on building modern states and launching massive economic transformations.

Given the lack of required skillful local labor forces at the time, governments opted for bridging that deficit with migrant labor, whilst at the same time investing generously in their local human capital. States were the primary employers of inputs at the beginning, until active private sectors emerged later along countries' development paths. Whereas local workers remained chiefly interested in the public jobs consciously and actively provided by governments, private sectors' labor demands were fundamentally satisfied by migrant workers. These dynamics resulted in a public/private labor market segmentation in terms of labor force allocations and earning structures. In terms of earnings in particular, with the objective of raising local populations' standards of living, public jobs offered lucrative employment terms.

This led to relatively high public earning structures and high local workers' reservation wages. In the private sector, where firms' hiring decisions are driven by the motive of profit maximization, coupled with easy access to relatively cheaper migrant labor, earnings remained lower. This, in turn gave rise to persistent earning gaps between public and private employment, further exacerbating the public/private labor market segmentation. Even with the introduction of various forms of nationalization policies, local work forces remain hesitant joining private employment, just as private employers remain hesitant hiring local workers.

Additionally, given the social construct of GCC populations, where men are considered the main bread winners of families, female labor force participation rates are among the lowest internationally. Even after recent changes in such perceptions, local women still prefer a narrow set of industries, mainly public health and education. In private sectors, where the bulk of labor demand is generated in the construction, wholesale and retail trade industries, employers prefer hiring prime-aged, migrant men. These factors, among others, add another layer of segmentation to an already segmented labor market, rendering migrant women at the bottom of earning distributions in the GCC.

Among the migrant labor force are three main groups. Asian workers who comprise an overwhelming majority of privately employed migrants, Arabs and Westerners. Since Westerners are in relative short supply, highly endowed and with significant bargaining power, they are the higher earners among all other migrant groups. Asians, on the other hand, face quite different market conditions which result in the lowest earnings, even within the skilled labor force. Yet another layer of segmentation.

From a purely economic standpoint, GCC member states are recommended to revise current migration policies and processes. Recruitment of migrant labor ought to be exclusively based on economy-wide information matching the stock of local skills and the economies' demands for skills, such that only workers with no local substitutes would be recruited. This will increase the complementarity between local and migrant labor, increasing productivity and wages.

Current gaps in employment terms in the public and private sectors ought to be minimized. This includes processes and criteria of hiring and firing locals and migrants alike. Labor market exchange ought to become more performance-based, free of nepotistic or discriminatory behavior.

Additionally, labor mobility must be sustained at the local level and preferably at the regional level. Workers, especially migrants, shall be allowed to move freely across industries within any given member state enhancing the efficiency of resource allocation. That said, labor mobility across GCC member states by means of a multilateral labor agreement would increase the efficiency of resource allocation GCC-wide, increasing the profitability of the regions private sectors and eventually increase employment of locals and migrants.

Several aspects of GCC labor markets, that are nonetheless related to the context of segmentation, remain unaddressed by this research note. These may include institutional frameworks such as GCC's sponsorship systems and migration provisions, past and recent regulations such as minimum wage laws, regional differences in nationalization policies and active bilateral labor agreements, as well as the region's domestic sectors.

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