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THE SOCIO-ECONOMIC IMPACT OF COVID-19 AND LOW OIL PRICES ON MIGRANTS AND REMITTANCES IN THE ARAB REGION

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Introduction

The Arab region recorded its first COVID-19 cases in the Gulf States in late January 2020. The pandemic has subsequently spread to the rest of the region,[1] accelerating to over 100,000 cases per week from September 2020.[2] On the economic side, lockdowns to control the spread of COVID-19 and the collapse of oil prices have plunged most Arab countries into deep economic recession, regardless of their status as oil-exporting, oil-importing middle-income, or crisis-affected countries.

The Arab region is host to an estimated 40 million immigrants (Annex, Table 1), and 30 million or more of the regions' citizens are emigrants worldwide (Annex, Table 2).[3] The pandemic and subsequent economic crisis have both underlined and aggravated the pre-pandemic vulnerability of migrants in the region, as well as the vulnerability of the region's diaspora in their host states. Using data from international agencies, sending and receiving countries, and press statements, this paper first introduces the trends and main characteristics of migration to and from the Arab region. The vulnerabilities faced by migrants in the Arab region are briefly discussed. The period of reference is 2019, prior to the crisis. The paper then analyses the socio-economic impact of the twin crises—COVID-19 and low oil prices—on the migrant population in and from oil-exporting countries, middle-income oil-importing countries, least developed countries (LDCs) and fragile/crisis-affected countries in the Arab region. It then concludes with an in-depth focus on the channel of remittances. In this regard, the paper briefly discusses the measurement of remittances, the importance of remittances—sent and received—in the region, the vulnerability of Middle East and North Africa (MENA) emigrants to income loss, the impacts of remittances on socio-economic indicators in the region, and the likely consequences of lockdowns and declining oil prices on remittances, and consequently, socio-economic indicators using microdata from four country studies (Algeria, Egypt, Tunisia and Somalia). Based on the analysis, the paper proposes a set of policy recommendations.

1 The countries included in this study are the Arab League Member States, with the exception of the Islamic Republic of Mauritania and the Union of the Comoros.

2 World Health Organization records published online (United Nations Development Programme, 2020a). The data is for the period to end of September 2020 and does not include the People's Democratic Republic of Algeria.

3 Unless stated otherwise, the definition of a **migrant** in the chapter is adapted from United Nations (2008), paragraphs 2.91 and 2.92. To reflect receiving countries' diverse immigration systems and legislation on citizenship and naturalization, a migrant may be:
1. A usual resident of a country who was born outside that country, as a foreigner (birth criteria); the migrant can be still a foreign national in the residence country or be naturalized.
2. A usual resident of a country, holding a foreign nationality (nationality criteria).
The term includes all legal categories of persons and purposes/circumstances of cross-borders movements, such as migrant workers, family dependents, persons forcibly displaced across international borders, registered refugees, etc. The definition excludes persons whose movements are due to recreation, holidays, visits to friends and relatives, business, medical treatment or religious pilgrimages, i.e. who did not change their place of usual residence.
An **immigrant** is, "from the perspective of the country of arrival, a person who moves into a country other than that of his or her birth and nationality or usual residence, so that the country of destination effectively becomes his or her new country of usual residence". An **emigrant** is, "from the perspective of the country of departure, a person who moves from his or her country of birth and nationality to another country, so that the country of destination effectively becomes his or her new country of usual residence" (International Organization for Migration, 2019). In the paper, unless stated otherwise, registered refugees (see footnote 6) and the other legal categories of persons and purposes/circumstances of cross-border movements, as stated in the above definition of who is defined as a "migrant", are included in the umbrella categories of "migrants", "immigrants" and "emigrants".


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I. Migration to, from and within the Arab region prior to the COVID-19 crisis: trends and characteristics

In 2019, the Arab region was host to an estimated 40 million immigrants (Annex, Table 1), and 30 million or more of the regions' citizens were emigrants worldwide (Annex, Table 2). Emigrants from the region made up 7.3 percent of Arab countries' national populations, which stands markedly above the world average of 3.5 percent.[4] Furthermore, despite only accounting for 5.5 percent of the global population, the region hosted almost 15 percent of the world's international migrant stock.[5] Among these, registered refugees[6] numbered

4 Author's calculations, based on United Nations data (United Nations, 2019a; United Nations, 2019b).

5 271,642,105 migrants (United Nations, 2019a).

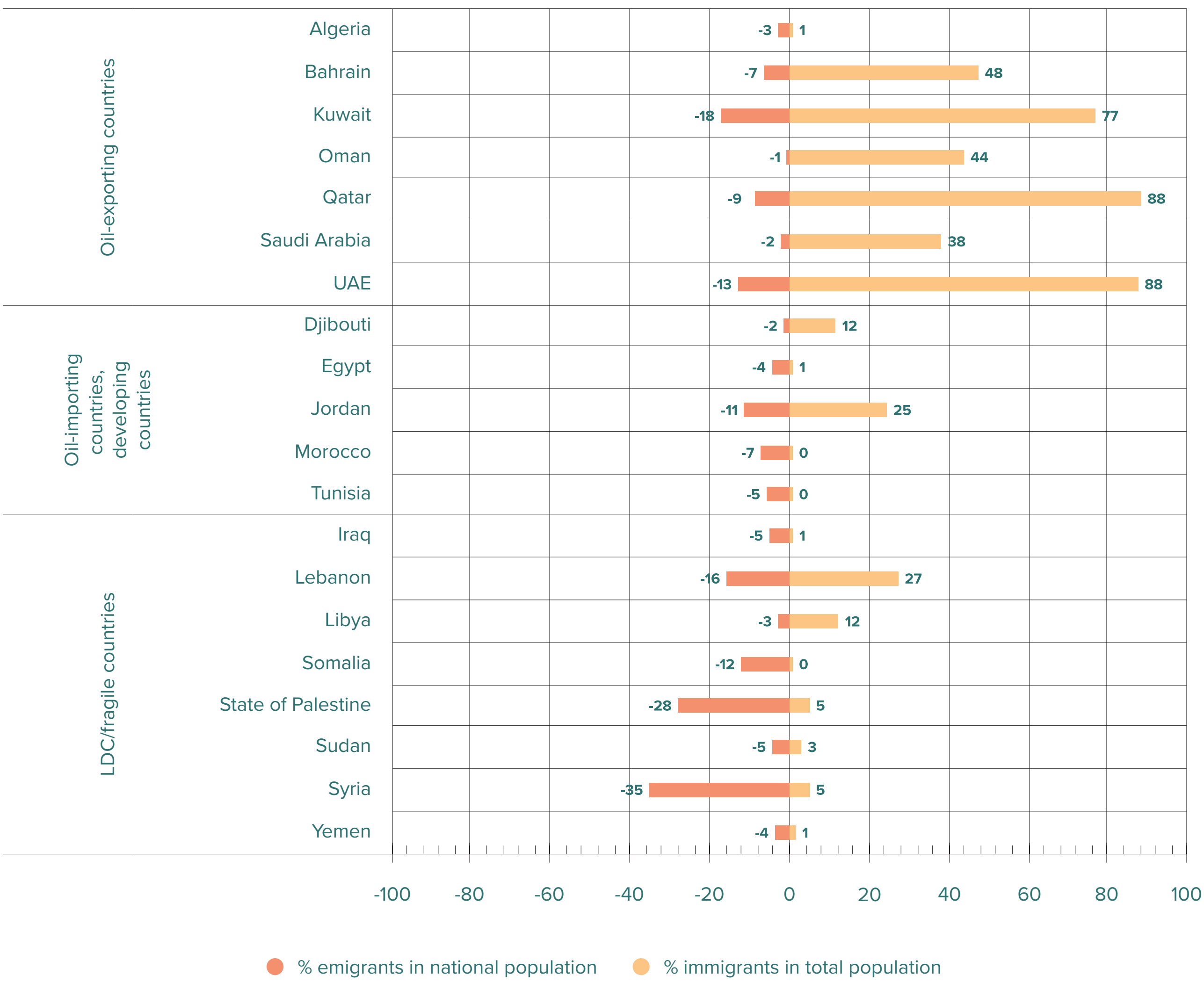
6 The "registered refugee population" comprises those formally registered as refugees or asylum seekers with the Office of the United Nations High Commissioner for Refugees (UNHCR), and Palestinian refugees registered by the United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA) in its five operation zones: the West Bank, Gaza, the Lebanese Republic, the Syrian Arab Republic and the Hashemite Kingdom of Jordan. The registered refugee population only partly overlaps with the immigrant population of interest here (i.e. born abroad as a non-national of the current host state), or the non-nationals, depending on the definition of the receiving state. Due to the protraction of many of the regional conflicts, refugees are not necessarily migrants. Some—Palestinians especially—have been in their host countries for generations, which means that an (unknown) share of today's refugees are born in their current country of usual residence. Others have been naturalized in their country of residence. In Jordan, for example, most 1948 refugees, and those displaced in 1967, were naturalized. Consequently, their descendants are born in Jordan as Jordanian citizens. Yet, they are refugees registered with UNRWA. In the paper, Palestinian refugees in Jordan are not included among the immigrants (see Annex, Table 2, note (f)) and emigrants (see Annex, Table 1, note (c)).

around 10 million (Annex, Table 3). Arab countries therefore hosted 37 percent of the estimated 29 million refugees worldwide (United Nations, 2019a). Refugees from the State of Palestine (6.3 million) and Syria (2.1 million) made up 60 percent and 20 percent, respectively, of all refugees in the region (Annex, Table 3). The Arab world is thus characterized by the intensity of migration movements from, to and within the region.

Numbers of migrants and their proportion in receiving and sending populations

While 7.3 percent of Arab nationals on average have emigrated abroad, 9.3 percent of the region's resident populations are composed of foreign immigrants.[7] However, as illustrated in Figure 1, only a few countries in the region both send and receive migrants: only four countries—Jordan, the State of Kuwait, Lebanon and the United Arab Emirates—have significant shares of foreign immigrants in their resident populations, coupled with sizeable communities of nationals abroad.

Figure 1. Share of emigrants and immigrants in the Arab region, by country (2019)



Source: Annex, Tables 5 and 6.

7 Most Arab countries do not naturalize immigrants and apply the nationality criteria: migrants are defined as foreigners. Therefore, second- and third-generation descendants of migrants, born in their country of residence, cannot be identified in statistics and separated from the "migrants" (first generation, born-abroad immigrants).

Oil-exporting states are the largest recipients of immigrants. The six Gulf Cooperation Council (GCC) countries alone hosted 30 million foreign citizens[8] in 2019, of whom 13.1 million were in Saudi Arabia (Annex, Table 2). These foreign citizens represented 11 percent of the world's total migrant stock (United Nations, 2019a), and more than half (53 percent) of the Gulf region's resident population (Annex, Table 5; Figure 1). As many as 88 percent of residents in Qatar and the United Arab Emirates were immigrants.

By contrast, as is also highlighted in Figure 1, crisis-affected countries and LDCs are more often countries of emigration. For example, over one third (35.4 percent) of Syrian nationals (i.e. 8.9 million people) had left the country as of 2019 (Figure 1; Annex, Table 6). Up to 28 percent of the State of Palestine's national or born-in population were residing in another country, among whom many were registered as refugees in the host state (Annex, Table 6; Figure 1),[9] while for Lebanon this figure was 16 percent and for Somalia it was 12 percent. To a lesser extent, Lebanon and Libya also host sizeable immigrant communities—27 and 12 percent, respectively—of their resident populations.

Registered refugees made up 11 percent on average of crisis-affected countries' total national populations (residents and emigrant citizens combined), with figures ranging from 27 percent of the Syrian population to 5.4 percent of the Somalian population (Annex, Table 8). Refugees make up a small share (4.2 percent) of fragile countries' resident populations (immigrants and resident nationals combined), but as much as 54 percent of the State of Palestine's residents and 21.5 percent of Lebanon's residents (Annex, Table 7). However, it is likely that figures of *de facto* refugees among immigrants may be underestimated. These fragile and crisis-affected countries serve as transit countries to other destinations (the European Union for Libya and Lebanon, the Gulf States for Yemen). Fragile LDCs may also receive refugees from neighbouring conflict-affected countries—the Republic of Sudan, for example, received refugees from the Republic of South Sudan and from other neighbouring countries. In the extreme case of war-torn Yemen, the collapse of state institutions and functions, plus the added complexity of the mixed nature of the immigration from the Horn of Africa (refugees, migrants in transit, stranded persons, etc.), has hampered the monitoring of migrant flows and stocks beyond those formally recorded by the Office of the United Nations High Commissioner for Refugees (UNHCR) as refugees and asylum seekers (Wilson-Smith, 2019).

Oil-importing middle-income countries are mostly countries of emigration, except for Djibouti (where 12 percent of the resident population are immigrants) and Jordan. Jordan is both a country of emigration (11 percent of the country's national population have emigrated abroad) and a country of immigration (in 2019, 25 percent of the resident population were immigrants and 30.3 percent were registered refugees).[10] In Egypt, the most populous country of the Arab States, with over 100 million inhabitants (representing 24 percent of the region's population), "only" 4 percent of nationals are emigrants abroad. Yet, the 4.4 million recorded Egyptian emigrants make up the second largest Arab migrant community, only outnumbered by Syrians.

Destinations of Arab emigrants, origins of immigrants

A significant share of Arab citizens migrate within the region: in 2019, almost half (48.2 percent) of emigrants from Arab countries resided in another Arab state, a quarter of them in the six GCC states alone (Annex, Table 1). Of the 13 million refugees originating from the 20 Arab countries, 48 percent had remained in the Arab region (Annex, Table 4). As illustrated in Figure 2, migrants usually move towards destinations that are geographically close to their country of origin. While most of the Maghreb countries' citizens emigrate to Europe (87 percent of Moroccan emigrants, 85 percent of Algerian emigrants and 72 percent of Tunisian emigrants), the six GCC countries attract migration from Arab states: 60 percent of the 4.4 million Egyptian emigrants and almost three quarters of the Jordanian emigrants were residing in the GCC region in 2019 (Annex, Table 1; Figure 2), mostly in the Kingdom of Saudi Arabia, the United Arab Emirates and Kuwait (Gulf Labour Markets, Migration, and Population Programme—GLMM, 2017a).

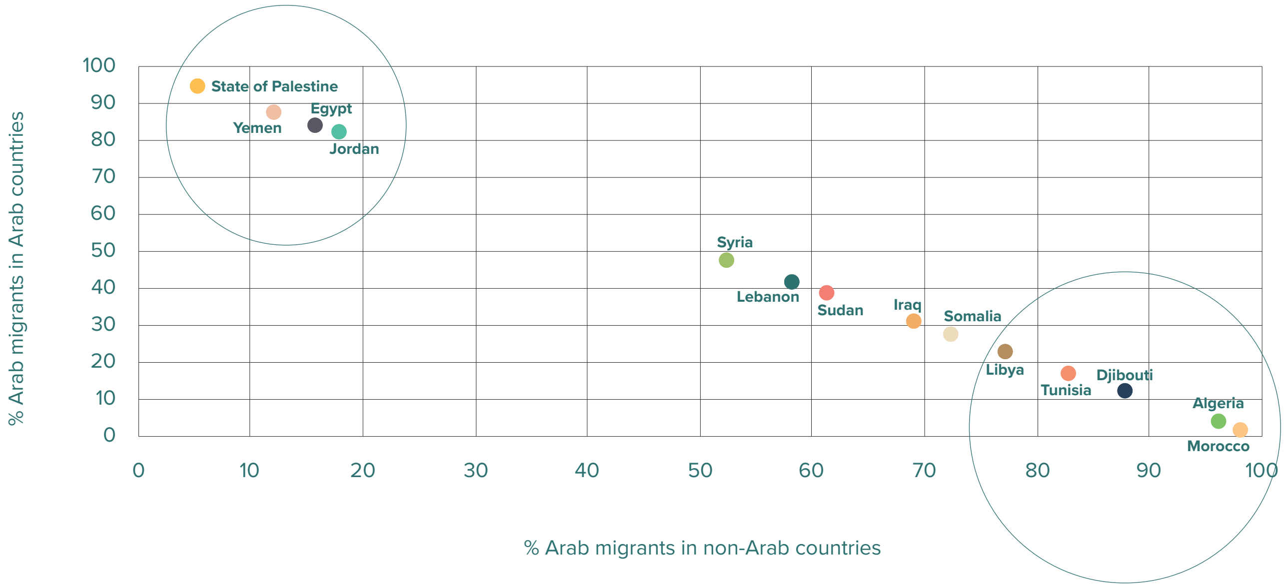
8 See previous footnote.

9 Figures for the State of Palestine should be treated with caution, as it is difficult to separate "migrants" (i.e. born abroad as foreign nationals) from "refugees", who may be born in their current country of residence. Unlike United Nations (2019a) data, the figures of immigrants from the State of Palestine presented in this report do not incorporate all registered refugees, for example for Jordan. The figure selected here (634,182) is taken from Jordan's latest census, which focused on residents' nationality, not place of birth. Yet the accuracy of such a figure may be questioned, as some residents classified as Palestinians (i.e. who do not hold Jordanian nationality) may be born in Jordan and hold a range of administrative statuses. For Lebanon, estimates were taken from recent field surveys.

10 A large share of the refugees in Jordan (especially the refugees from the State of Palestine and their descendants) are not migrants. They were born in Jordan and hold Jordanian nationality. Therefore, in the case of Jordan, the two categories of "refugees" and "migrants" only partly overlap (see footnote 6).

Emigrants[11] from crisis-affected countries followed a similar trend: 83 percent of Yemeni emigrants went to Gulf States; 95 percent of Palestinian emigrants, among whom many are refugees, were recorded in the Arab region; 28 percent of Somali emigrants were in Arab countries (primarily Yemen); and 39 percent of Sudanese emigrants were in Egypt. In the case of Somalia and Sudan, however, around half of emigrants from the two countries were also present in neighbouring sub-Saharan African countries. Half of Syrian emigrants had moved to the Arab countries that border Syria (Jordan and Lebanon), and 43 percent had moved to the Republic of Turkey (Annex, Table 1). The 2.1 million Iraqi emigrants, of whom one third were registered refugees, were dispersed across the Mashreq, Turkey, Europe and North America (Annex, Table 1; Figure 2).[12]

Figure 2. Percentage distribution of Arab emigrants by destination (to Arab countries or non-Arab countries) (selected countries, 2019)



Source: Annex, Table 1.

In 2018–2019, immigrants in the Arab region were mostly concentrated in oil-producing Gulf States, which hosted 30.4 million immigrants, i.e. 76 percent of the 40 million immigrants in the 20 countries (Annex, Table 2). The bulk of immigrants in the six GCC countries were from Asia (72 percent). Arabs accounted for 23 percent of immigrants in the six countries, of whom 38 percent (2.6 million) were from Egypt alone. Large numbers of immigrants were also found in Jordan (2.5 million), Lebanon (1.8 million) and Sudan (1.2 million). Sudan accommodated 1.1 million sub-Saharan Africans, most of them refugees from South Sudan (Annex, Table 2).

Most of the region's registered refugees are from within the region: 86.2 percent, or 9.1 million of the 10.6 million refugees recorded in the 20 Arab states (Annex, Table 3). These refugees were concentrated in the crisis/fragile countries in the region, which hosted 64 percent of the total in 2019. One third were recorded in oil-importing developing countries. The richest oil-producing countries and largest recipients of international migrants, the GCC

11 Including refugees (see footnote 3).

12 The figure illustrates the preferred destination of emigrants from each Arab country: another Arab country vs a non-Arab country. The sum of x+y is 100. For example: 82 percent of Jordanian emigrants are residing in another Arab country, while 18 percent of Jordanian emigrants are residing in a non-Arab country, as of 2019.

countries, hosted less than 2 percent of all refugees in the region.[13]

Characteristics of migrants

Stocks of immigrants to the major receiving countries are demographically distorted (Annex, Table 11). The sex ratio among foreign residents in the Gulf States, for instance, ranges from 239 to 572 men to 100 women in Kuwait and Oman respectively (GLMM, 2017c). United Nations data also indicated that females made up 29 percent of immigrants to Libya, a sex ratio of 247 men to 100 women.[14] The age structure of migrants in Gulf States is also acutely skewed towards economically active age groups. Those aged 25 to 64 years made up 75 to 85 percent of immigrant populations, as compared with around 40 percent of national populations. Children (aged 0 to 14 years) constituted less than 20 percent of foreign residents, much less than among Gulf nationals (GLMM, 2017b).

The demographic characteristics of migrants in the Gulf States indicate that they are largely economically active, since the right to family reunion is limited to migrants at the upper level of the occupational scale. The GCC region's economic growth has been stimulated by oil revenue and large-scale, labour-intensive construction and infrastructure projects, relying on workers of all skill levels (Malit Jr. and Naufal, 2017). Yet the bulk of foreign workers in the Gulf States were confined to the bottom of the occupational ladder; in Saudi Arabia, for example, 78 percent of foreign workers were in the lowest "blue collar" categories (from "engineering support" to "services") in 2017 (GLMM, 2018b).

Jordanian and Lebanese emigrants are generally tertiary educated and occupy skilled and even highly skilled positions in the Gulf (Jordan Strategy Forum, 2018). Due to their large numbers, Egyptians in the Gulf States are found at all occupational levels. In Saudi Arabia in 2013, for instance, the most common occupations among Egyptian emigrants were: general accountant, marketing specialist, and livestock and agricultural jobs (Middle East Monitor, 2013). In general, foreigners are most often involved in the construction sector (10.4 percent of all employed non-nationals in Kuwait to 40 percent in Oman and Qatar) and the trade sector (12 percent in Oman to 22 percent in Saudi Arabia) (GLMM, 2018a).

Foreigners were concentrated in the private sector (from 68 percent of all foreign workers in Kuwait, to over 80 percent in Bahrain, Oman and Qatar) and in the domestic sector (from 9 percent of all employed foreign nationals in Qatar, to 27 percent in Kuwait) (GLMM, 2019a). Female migrants, when employed, largely work in the domestic sector; figures range from 75 percent of all employed female migrants in Saudi Arabia (GLMM, 2018b) to 45 percent in the United Arab Emirates (GLMM, 2019c). In Jordan, the domestic services sector employed 19 percent of all registered workers in 2016, and 60 percent of all women among them, mostly originating from Bangladesh, the Philippines and Sri Lanka (Jordan, Department of Statistics, 2016).

In the Gulf States, Jordan, and Lebanon, employers of domestic workers have to provide meals, clothing, accommodation and medical care to both their male and female employees by law (Nasri, 2017; Migrant-Rights.org, 2018). Since domestic workers, like other foreign labourers, cannot work for employers other than their sponsors, they are therefore housed by the employer. Low-skilled labourers in the Gulf and in Jordan are often housed in labour compounds, i.e. large company-owned labour camps with shared facilities (bathrooms, kitchens, canteen, etc.) that sometimes accommodate thousands of foreign labourers. Single, low-paid workers may also be housed in shared apartments and villas. In Qatar in 2015, 60 percent of the total population (nationals and non-nationals) and 74 percent of all male residents were living in labour compounds (GLMM, 2017d). In Jordan, the manufacturing sector (mainly the apparel assembly and garment industries) employed 35 percent of all foreign female documented workers and a quarter of all foreign labourers in 2016. Usually located within Qualifying Industrial Zones, manufacturing industries provide closed housing

13 As suggested earlier, the numbers of immigrants in fragile countries (most of which are not countries of immigration) may be underestimated, as may the numbers of immigrants in other countries that are also mainly countries of emigration (the Kingdom of Morocco, the People's Democratic Republic of Algeria and the Republic of Tunisia in the Maghreb; and Egypt in the Mashreq). These countries are transit countries for "third country nationals", i.e. migrants from sub-Saharan Africa and Asian countries, who cross these territories on their way to the European Union or Israel, or to the Gulf States in the case of Djibouti. Estimates of third country nationals from sub-Saharan Africa in North African states number a few thousand in available statistics (Annex, Table 2), which mainly refer to registered refugees. Yet, those largely unrecorded migrants make up increasingly large numbers. For example, in late 2019, the International Organization for Migration (IOM) estimated that at least 500 migrants from West African countries were entering Algeria daily (Makooi, 2019). Records of sub-Saharan immigrants in Tunisia included around 10,000 irregular immigrants and 7,000 students (Boukhayatia, 2020; Comité Catholique Contre la Faim et pour le Développement–Terre Solidaire, 2020). In Morocco, about 50,000 undocumented foreigners were regularized in two operations, in 2014 and 2018 (Morocco, High Commissioner for Planning, 2020). Of these, most were from African countries (80 percent in 2014) (Fédération internationale des ligues des droits de l'Homme/Groupe antiraciste d'accompagnement et de défense des étrangers et migrants, 2015). No estimates of the numbers of sub-Saharan residents or workers, whether holding a residency and labour permit or undocumented, are available in official statistics and in surveys conducted with this population. Yet, considering that many more remain in an irregular situation (newly arrived migrants, stranded migrants denied regularization and asylum), the figure of 6,600 immigrants from sub-Saharan Africa recorded in Table 2 is clearly an underestimation and these migrants could number tens of thousands in Morocco.

14 Author's calculation based on figures from: United Nations (2019a).

compounds to accommodate their foreign employees, who are usually recruited directly from their countries of origin, mostly Bangladesh and Sri Lanka (De Bel-Air, 2019, pp. 60–61). Shared accommodation is also the norm for most undocumented refugees living in the region: 60 percent of Iraqi, Yemeni and sub-Saharan African refugees interviewed by UNHCR in Cairo in 2018 were living in rooms rented in apartments (UNHCR, 2019b, p. 38).

In the agricultural sector—the primary employment sector for foreign labourers in Jordan (29 percent of the total), and for Egyptians among them—low pay and precarious living conditions are especially prevalent. Furthermore, irregularity was pinpointed as particularly frequent in the economic sectors offering short-term, project-based assignments (construction), away from cities (agriculture) and especially away from the public sphere (household domestic labour). It was estimated that only 54 percent of domestic labourers and 40 percent of agricultural labourers were properly documented in the mid-2010s in Jordan (UNHCR, 2019b, pp. 61–62).

The share of refugees among immigrants to the Arab region is low (11 percent),[15] but significantly higher among Arab emigrants (31 percent of all emigrants from the 20 countries within and outside the Arab region) (Annex, Tables 9 and 10). It is even higher among migrants from crisis countries in the region. Half (49 percent) of emigrants from these countries were registered refugees: up to 76 percent for Syria alone, as well as 44 percent of Somali emigrants, 40 percent of Sudanese emigrants and 33 percent of Iraqi emigrants (Annex, Table 9). Emigrants from the oil-importing countries, who mostly emigrate to the nearest region (the European Union from the Maghreb, and the Gulf States from the Mashreq), are seldom refugees, except for the Djiboutians (Annex, Table 9). Unlike the major countries of immigration (the GCC states), 38 percent of immigrants to the oil-importing countries and 63 percent of immigrants to the fragile, crisis-affected countries were refugees (Annex, Table 10).[16] This aggravates the pressure on these countries' socio-political dynamics, insufficient resources and weak infrastructures.

Vulnerabilities

The various emigration and immigration patterns described in this section both underline and create specific vulnerabilities among migrants from and to the region.

Large emigration movements signal a low level of social cohesion in countries of origin

The scale of emigration from Arab countries points to the economic, social and political fragility of countries of origin. Besides situations of open armed conflict, large-scale emigration reveals a web of issues and concerns for local populations. These concerns were repeatedly voiced during the various street protests and uprisings that have taken place throughout the region since the late 2000s, and especially since 2011. As clearly emphasized in public opinion polls, such as the Arab Youth Surveys (ASDA'A BCW, 2019; ASDA'A Burson-Marsteller, 2017), corruption and nepotism, low salaries, and the absence of rewarding economic opportunities for young people (especially the most educated and skilled among them) are all reasons to emigrate, especially from the Maghreb and the Mashreq (United Nations Development Programme—UNDP, 2016, Chapter 7; Milton-Edwards, 2018; Ayeb, 2019). Furthermore, the control of the process of elite reproduction and the protection of patronage networks in the region also motivate regimes to encourage reform-savvy, or potentially disruptive young people to emigrate (UNDP, 2016, p. 157).

Another issue is migrant remittances, a lifeline for migrants' family members left behind and a significant share of migrant-sending countries' gross domestic product (GDP) (UNDP, 2020b). For these reasons, sending countries have not implemented policies actively seeking emigrants' return (UNDP, 2016, Chapter 7).

The lack of data on emigrants may be due to the weakness of statistical systems of countries in the global south. More generally, however, not recording emigrants implicitly means denying that they are a part of the citizenry: as expressed by Bookman, one indeed "counts" (i.e. matters) if one "is counted" (i.e. enumerated) (adapted from Bookman, 1997, p. 71).

The fragility of global contexts and the absence of socio-political cohesion in sending countries is also dramatically underlined by the 31.5 percent of Arab emigrants registered as refugees (Annex, Table 9). The prevalence of migrants in irregular situations in crisis and in oil-importing countries points to the precarity experienced by many Arab migrants (e.g. from Somalia to Djibouti or Yemen; or from Iraq, Sudan and Syria to Lebanon) and non-Arab immigrants in these countries. Undocumented migrants are particularly vulnerable to abuses by smugglers and to trafficking networks, either during their travel, in transit or in destination countries, which offer them no assistance.

15 These figures do not include Palestinians, who were removed from the totals of registered refugees and immigrants because the numbers of Palestinian registered refugees are higher than the numbers of Palestinian immigrants, as explained earlier. If Palestinians were included, ratios of refugees to immigrants would exceed 100 percent.

16 The figures do not include Palestinian refugees.

Women in such situations are especially vulnerable by all accounts, especially to gender-based violence (Mixed Migration Centre, 2019). Also, women often experience more difficulties than men in accessing independent resources, especially in Arab destination countries where there are fewer laws to protect women. This situation channels female migrants to specific occupations (sex work, domestic labour, etc.) and forces them to depend on other men, migrant or local (de Regt, 2010).

The polarization of Arab labour and forced migration from the Arab region adds to the economic and legal vulnerable status of migrants

The polarization of Arab migration from each country to a specific receiving region[17] makes migrants and origin countries very vulnerable to economic downturns and policy changes in destination areas. Migrants from the Maghreb, for example, have been unable to redirect to alternative destinations following the progressive closure of European Union borders since the 2000s. The persistent migration pressure has therefore forced migrants into more risky sea travel (UNHCR, 2019a).

The polarization of Arab migration to specific receiving regions also means that sending countries have a dependency towards receiving states. However, some of these states do not grant migrants the labour and civil rights required by international standards. Moreover, most countries in the Arab region do not recognize refugees' international protection status because they did not ratify the 1951 Geneva Convention relating to the status of refugees or its 1967 Protocol. Exceptions are the three Maghreb countries, Djibouti, Egypt, Somalia, Sudan and Yemen (UNHCR, 2015). However, according to Bisiaux (2020), policies enacted towards asylum seekers and *de facto* refugees seeking protection in these countries represent, at best, a policy of "non-hospitality" ("non-accueil").

The rule of law in most Arab states does not extend to immigrants, who are submitted to discriminatory measures. *Kafala* (sponsorship) existed throughout the GCC region, Jordan and Lebanon until 2019.[18] Sponsorship forces foreign workers to depend on a local guarantor. The system may therefore place the foreign labourer in a position of "structural dependence" (Longva, 1999) and subordination vis à vis the sponsor, theoretically his/her employer, who controls the migrant's professional mobility and exit from the territory. Dependence on employers' permission for mobility, and the vulnerability created by the sponsorship system, are particularly problematic for live-in domestic workers, who are often women (Nasri, 2017). Changing job without the sponsor's permission is difficult, despite recent reforms, and is impossible for low-skilled labourers. Several categories of workers, especially low-skilled and domestic workers housed by their employers, have their passports confiscated by their sponsor (Amnesty International, 2018; Fargues et al., 2019b, p. 12), although the practice is officially outlawed in Jordan and in every Gulf country today (van de Glind et al., 2017). The *kafala* system also ensures that labour migrants do not settle permanently in the country. Labourers are contract workers, whose stay should not extend beyond the end of their labour contract. For this reason, the right to family reunion is limited to certain categories of foreign employees: those in the upper echelons of the occupation scale. In some GCC countries, wives of employed foreigners are not allowed to work, which makes them dependent on the husband's sponsor for exiting the country, travelling, etc. Naturalization is quasi-impossible, no matter how long a worker has been living and working in a host country.

The socio-economic segmentation between nationals and foreign citizens is therefore the rule in the region and extends to job opportunities: increasing numbers of professions and sectors are only accessible to nationals, due to ongoing job nationalization policies.[19] This nationality-based segmentation also affects salaries (nationals are paid more than most foreigners) and other factors such as housing, as demonstrated earlier, and at times can culminate in segregation outcomes and human rights violations.

However, segmentation is also the rule within foreign communities, which prohibits collective bargaining and action; salaries, for example, also vary according to the worker's origin (Europeans are paid more than Arabs, who receive more than Asians, and so on) (Anderson, 2015), which is not illegal in the Gulf. Arabs, and especially, the highly skilled among them, usually rely on personal networks to emigrate and negotiate their conditions (De Bel-Air, 2018). However, salary scales, as well as working and living conditions for the mass recruitment of low-skilled labourers, or for the state secondment of experts, are usually established through bilateral labour agreements between sending and receiving governmental authorities.

17 Due to a wealth of reasons, including geographic proximity, shared historic ties, cultural proximity, existence of networks facilitating migration, attractive labour opportunities and/or conditions, etc.

18 Reforms of the sponsorship systems were conducted in almost every country in the region, from (partially) lifting exit permits to opening (limited) avenues for changing sponsor and job. Qatar formally ended sponsorship in January 2020. In October 2020, Saudi Arabia announced drastic reforms of the system, to be introduced in 2021.

19 For example, see the Jordan Ministry of Labour (2020) website. Saudi Arabia launched the *Nitaqat* policy for the Saudization of the workforce in 2011, which progressively closes some economic sectors to foreign employees.

Constrained by the necessity to export their labourers, poor migrant-sending states retain little agency in negotiating good conditions for their nationals. Controlling employer abidance to the terms of the agreements is also an issue because most countries in the region do not apply international labour regulations (Human Rights Watch, 2020c).

The structure of migration stocks: prevalence of vulnerable categories

As noted in this paper, refugees make up a large share of Arab migrants, and most have sought shelter in neighbouring countries. These are often fragile economically (Jordan) as well as politically (Lebanon). More generally, the concentration of refugees in crisis countries has added to the burden of these countries and put a strain on solidarity and local absorption capacities (UNHCR, 2013). This has added to refugees' vulnerability in their host states, especially registered and non-registered refugees living in urban and rural settings. Only a minority are housed in camps providing minimal support and sanitary infrastructure. For example, in Egypt, Iraq, Jordan and Lebanon combined, only 5 percent of Syrian refugees were housed in camps in 2020 (United Nations, 2020).

The large share of low-skilled labourers in the oil-exporting countries and in Jordan also increases migrant vulnerability, as many of them are housed in separate compounds, with no possibility to escape abusive working or living conditions. Most foreign labourers are therefore confined to the so-called "3D" jobs, i.e. "dirty, dangerous and difficult". The clustering of most active foreign women, as well as a sizeable number of men, in domestic labour[20] also poses a problem for their agency and protection in their host countries. Domestic workers, especially women, are one of the most vulnerable groups of migrant workers in the Gulf and the Mashreq (Amnesty International, 2014). Often isolated within homes and highly dependent on their employers in almost every aspect of their lives, they are not covered by labour law protections across the Gulf. Even in Jordan, where domestic labour has been incorporated within the provisions of Jordan's labour law since 2008, verifying compliance is difficult (Tamkeen Fields for Aid, 2015).

More generally, there is a lack of legal provisions protecting women in general in Arab countries of immigration (Kalush et al., 2019). Sexual abuse is frequent, especially among live-in and informal live-out domestic workers and refugees in precarious situation (Allam, 2020). The vulnerability of female migrants is compounded by the fact that they frequently share accommodation with their employers (in the case of women domestic workers) or other refugees. In Egypt in 2018, 1,231 cases of sexual and gender-based violence were reported to UNHCR and its partner CARE International by Africans and other nationalities, including Iraqis and Yemenis. These represented 81 percent of the total reported sexual and gender-based violence cases in 2018. Of these, 267 cases were children, including 13 separated and 80 unaccompanied children (UNHCR, 2019b, p. 16).

Lastly, another category of vulnerable migrants is the undocumented residents and informal workers. One of the sources of informality is political instability. Neither countries in crisis nor their neighbours who receive inflows of refugees, can accurately record sudden immigration and emigration movements. Cross-border, pendular movements are also hard to measure. This is the case for Libyans in Tunisia, whose numbers fluctuate in line with the intensity of the conflict (Annex, Tables 1 and 2). The prevalence of irregularity among migrants is also due to the complexity of immigration measures and to the sponsorship system, which multiply the categories of irregularity among foreign residents (De Bel-Air, 2017).

20 The domestic services sector includes all household services functions (cleaners, nannies, cooks, private drivers and guards, private gardeners, etc.).

II. Impact of the COVID-19 pandemic on migrants

In migrants' host states

In general, the COVID-19 pandemic has revealed and accentuated the vulnerability of most migrants in the Arab region. This has been especially acute among low-skilled labourers and refugees living outside the camps and settlements supervised by host governments and international agencies. This report now explores the various impacts of the pandemic on migrants and migration in and from the region.

Exposure of migrant workers and refugees to the pandemic

Compared to other regions in the world, the impact of the COVID-19 pandemic on the 20 Arab countries examined in this report may appear moderate.

As highlighted in the rare data disaggregated by place of birth, immigrants in the region were initially overrepresented among COVID-19-related cases, and probably deaths. The first victim of the virus in Yemen was a Somalian refugee (Al-Qaoud, 2020). In Saudi Arabia, immigrants make up 37 percent of the total resident population. Despite their younger age structure, immigrant communities accounted for 73 percent of all confirmed cases of COVID-19 in the Kingdom by 20 April 2020, and 83 percent of new cases reported at that time, according to the Saudi Ministry of Health (2020). An analysis of the 1,304 COVID-19 infections that occurred between 24 February and 17 April 2020 in Oman indicates that infected immigrants accounted for 64.2 percent of the recorded cases (Khamis et al., 2020), despite making up 44 percent of Oman's population. Migrants' higher exposure to the virus at the onset of the pandemic reveals the multifaceted precarity of most immigrants in their host states, especially throughout the Arab region.

The higher exposure of immigrants to the virus in the Arab region is due to multiple causes. In oil-exporting countries of immigration, where most immigrants are contract workers, they are also often “frontline workers”, such as cashiers, delivery persons, or skilled and highly skilled medical personnel, especially in the Gulf States (Batrawy, 2020). In Saudi Arabia, highly skilled immigrants employed in the health sector are mostly from Egypt, India and the Philippines. In 2018, immigrants made up 40 percent of Saudi public health sector employees, and 62.4 percent of the private health sector workforce (Al-Shanqityi, 2018).

The characteristics of migrant housing described earlier also played a role in the clustering of infections among migrants at the early stages of the pandemic. Poor refugees in camps or urban districts and low-wage labourers in overcrowded camps or labour compounds could not secure physical distancing, hygiene and isolation from infected individuals (The Economist, 2020). The lack of access to clean water and hygienic sanitation in some GCC labour camps had already been pinpointed by rights groups before the crisis (International Trade Union Confederation, 2014). In Jordan and Lebanon, refugees and other migrants often live in densely populated areas, with several households sharing dwellings and several generations living under one roof. Independent bathrooms and kitchens are also rare in Syrian refugee camps in Jordan. Such a setup makes preventive health measures very hard to implement (Tiltnes et al., 2019, chapter 3). Homeless migrants living in informal camps in Morocco also suffered from lack of access to health care facilities and hygiene products during the country’s mandatory lockdown period (Euromed Rights, 2020). Throughout September 2020, numbers of infections in refugee camps across Iraq, Lebanon, the Palestinian territories and Syria rose sharply (Chulov, 2020), likewise in refugee detention centres in Libya (International Rescue Committee, 2020).

More generally, access to health care has become more problematic since the outbreak of the pandemic. The World Health Organization (WHO) judged that Gulf States' health systems were of a good enough quality to absorb the crisis, yet not all workers have equal access to health care in the region. Free testing was made available at some medical clinics, but not necessarily everywhere and for all applicants; testing could cost up to US$100 in Abu Dhabi (Cornwell, 2020a). Qatar and Saudi Arabia both offered COVID-19-related free health care services to migrant workers, irrespective of their legal status in the country (Amnesty International, 2020). More generally, language, transportation and access to information were discriminating factors against migrants’ access to health care (Alahmad, 2020). Furthermore, domestic workers’ and other low-wage labourers’ access to health facilities is “largely dependent upon employer policies” (Wright, 2020). Some positive cases were reportedly turned away after being tested, others were forcibly detained in quarantine, and some may have been rounded up by the police prior to being deported (Wright, 2020). Such bad experiences deterred a number of foreign labourers from seeking testing or treatment (Asi, 2020).

Oil-importing countries, such as Egypt and Morocco, were already suffering severe shortages of doctors, nurses and midwives before the crisis, according to WHO (2019). In Egypt, for instance, migrants reported being turned away in some emergency cases because of a lack of available beds, and suffered a low quality of service in public hospitals (Habersky, 2020). Others also might have experienced racism and discrimination, especially amongst African refugee communities (Habersky, 2020). In Jordan, access to Ministry of Health medical facilities was opened to non-Syrian asylum seekers and refugees across the Kingdom in mid-July 2020, but not for free; the non-insured Jordanian rate applied (Inter-Sector Working Group Jordan, 2020). Also, refugee camps often lack developed health care infrastructure able to respond to the needs of COVID-19 patients. In Zaatari—the largest Syrian refugee camp in Jordan, which hosted 77,258 refugees in mid-2020 (UNHCR, 2020b)—there is one hospital, with 55 beds, and 10 health care centres. Intensive health care, such as access to ventilators, was virtually non-existent in camp settings (Partridge-Hicks, 2020).

In Syria, before the outbreak of the pandemic, WHO (2018) estimated that 70 percent of health care workers had left the country, while only 64 percent of hospitals and 52 percent of primary health care centres remained operational. Many hospitals or health facilities, located in areas close to conflicts, have also been damaged or closed, for example in Libya (Mahecic, 2020) and Yemen (Lorenzen, 2019). In the latter, imposing preventive measures, including social distancing, hygiene, quarantine and isolation, is impossible in the country’s conflict settings. Basic protective, testing and treatment equipment are absent (Alkarim et al., 2020). The rising numbers of African refugees trying to reach the Gulf States through Yemen are particularly at risk. These migrants are considered “the most exposed to spread coronavirus, as a result of the lack of access to health care, insufficient access to clean water, sanitation and other basic services” (Al-Qaoud, 2020). Moreover, warring parties have intervened in the activities of international aid agencies and humanitarian organizations, blocking the supply of protective equipment, threatening medical workers and leaving sick people afraid to seek treatment (Human Rights Watch, 2020a).

Mobility restrictions and their outcomes

Immigration policies and contagion containment measures also strongly affected the mobility of migrant labourers. On the one hand, in oil-exporting immigration states in the Gulf, close monitoring of coronavirus cases and extensive testing campaigns were rolled out. Densely populated areas inhabited by foreign, low-wage workers; labour compounds; and apartments and villas housing single Asian and Arab male labourers were particularly monitored, with full lockdowns reported in Dubai emirate, Oman, Kuwait and Qatar (Cornwell, 2020b). State-run and controlled isolation or quarantine camps, as well as transit camps, were also set up for irregular migrants prior to their repatriation (Zouache, 2020). Government-imposed restrictions on movement consequently prevented many of these migrants from accessing preventive care and necessary goods and services, unless provided by governments and companies, especially in cases where they were not allowed to leave their accommodation (Amnesty International, 2020). Lockdowns also made abuse against live-in migrants even less detectable than before. Domestic workers were affected by social distancing measures and isolation in employers' homes or shelters (Hubbard and Donovan, 2020), in addition to suffering increasing workloads and potential abuses (Financial Times, 2020).

On the other hand, some Gulf countries initially barred workers with valid permits and residency from re-entering the host state and resuming employment. These migrants eventually lost their residency (Al-Sherbini, 2020b). Migrants in the region also experienced a wave of forced departures. In Qatar, salary cuts were applied to foreign employees only (Foxman, 2020), making it unaffordable to stay in the Gulf for many middle-class migrants (Fattah and Abu Omar, 2020), who had no choice but to leave the host state, sometimes after years of residence (Al-Sherbini, 2020a). At the very beginning of the COVID-19 crisis, United Arab Emirates and other Gulf country private sector employers resorted to "early leave" schemes to encourage workers to return to their home countries; yet many were forced to accept unpaid leave (Copper-Ind, 2020b) and payment termination, even in international companies (Dhal, 2020). Employees made redundant in their company could be seconded to other employers during the crisis, for example via the "Virtual Labour Market" digital platform of the UAE's Ministry of Human Resources and Emiratization (MoHRE),[21] which provides employment services to job seekers and companies. Yet, because staying in the Gulf is dependent on employment, workers who lost their jobs and could not find suitable alternative opportunities were compelled to leave the host state sometimes at their own expense (Al-Sherbini, 2020a). However, according to some reports, some selected nationals might have also been forcibly repatriated (Budhathoki, 2020; Endeshaw and Paravicini, 2020).

To streamline and accelerate the departure of foreign labourers, other countries of immigration, such as Jordan, lifted all administrative obstacles, including fines (Arab News, 2020a). Jordan set up the online platform Hemayah.jo to coordinate migrants' repatriation, with a deadline set for 4 May (Heinrich Böll Foundation, 2020). Kuwait and the United Arab Emirates also accelerated the expulsion of many irregular migrants by declaring amnesties and waiving fines (Middle East Monitor, 2020; Human Rights Watch, 2020b).

In oil-importing and fragile crisis-affected countries, mobility restrictions also increased poverty, deprivation and precarity among low-wage migrant workers and refugees, as well as their potential stigmatization and discrimination. Informal employment is frequent among migrant workers and refugees in these countries, and they often were the first to lose their livelihoods due to mobility restrictions during lockdown. Egyptian labourers in Jordan, most of them in informal employment, became stranded in Jordan after losing income during lockdown (Heinrich Böll Foundation, 2020). Unemployment among refugees in Jordan's 10 United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA) camps rose from about 50 percent to almost 100 percent as a result of restrictions on movement and the closure of businesses to prevent the spread of COVID-19 (Luck, 2020). In Tunisia, a majority (61 percent) of a sample of sub-Saharan refugees and migrant workers reported experiencing reduced access to work as one of the impacts of the COVID-19 crisis on their daily lives, while around the same share (60 percent) reported having lost income due to the mobility restrictions imposed (Mixed Migration Centre, 2020). A survey conducted with Syrian refugees in Jordan and Lebanon concluded that one third of the Syrian workers interviewed in Jordan had lost their jobs permanently due to the crisis, as had 60 percent of the Syrian refugees in Lebanon (Kattaa and Kebede, 2020). In addition, among the Syrian refugees in Lebanon, 31 percent were temporarily laid off. Unable to cope with diminishing income, migrant workers and refugees face housing insecurity and threats of eviction if they are unable to pay their rent, risking falling into debt, among other outcomes. The survey also pinpointed employers' differential treatment towards nationals as compared with non-nationals: Lebanese and Jordanian citizens reported much lower incidences of job losses than Syrian refugees in the two countries (Kattaa and Kebede, 2020).

21 Available at https://careers.mohre.gov.ae/.

Migrant and refugee women may also be more affected than men by the impact of mobility restrictions. In Lebanon, 61 percent of Syrian women reported having lost their jobs due to COVID-19, compared with 46 percent of Syrian men (Kattaa and Kebede, 2020). Women are indeed disproportionately engaged in some informal jobs, which have been severely curtailed by the crisis in the whole region (World Food Programme, 2020). "Negative coping mechanisms" such as early marriages and taking debts were recorded (Mixed Migration Centre, 2020).

Lockdowns and restrictions of movements even disrupted the supply of basic items and food. Faced with drastic reduction or loss of their income, migrants suffered from price hikes for basic food items, for instance in Libya and Lebanon (Mahecic, 2020; Sewell and Chehayeb, 2020). Syrian refugees in informal settlements in Lebanon encountered difficulties in accessing food and basic items, as the restrictions on supply and movements due to the country's lockdown were compounded by the spiralling financial and economic crisis (Francis, 2020). A World Food Programme survey (2020) confirmed that refugees were particularly vulnerable to price increases, with 44 percent of Palestinian respondents and 64 percent of Syrians reporting that they were unable to have emergency food stocks, mainly due to unaffordability. In urban settings across North Africa, charities and non-governmental organizations (NGOs) managed to secure the distribution of food baskets and primary goods to vulnerable refugees, but the closure of local retail shops and the halting of road transport during lockdown disrupted the supply of basic goods in isolated refugee settlements, such as the Polisario-run refugee camps in southern Algeria. Although little affected by the virus, these populations experienced food insecurity because of the lockdown (Crétois, 2020).

A survey conducted on children's education during lockdown in Jordan, Lebanon and the State of Palestine highlighted how mobility restrictions may have deepened inequalities by disrupting access to education for some migrant and refugee children. Not all refugee children could be enrolled in distance learning schemes set up during lockdown. Syrian refugee children enrolled in public school afternoon shifts in Lebanon, for instance, lost their access to education. Technical obstacles such as repeated power cuts and slow internet connections also kept refugee students in Lebanon and the State of Palestine away from schooling during lockdowns. The cost of an internet connection and electronic equipment and their parents' unfamiliarity with teaching and technological tools also hampered refugee children's access to distance learning (Abu Moghli and Shuayb, 2020).

Limitations of access to rights and protection

According to UNHCR, border closures, travel restrictions and lockdown measures, as well as police surveillance of public spaces, have restricted the access to asylum rights and protection for refugees in need (UNHCR, 2020a), while also leaving asylum seekers stranded in corridor countries (i.e. Libya and Yemen). International refugee resettlements from countries in the region were put on hold in the wake of the mobility restriction measures, leaving refugees in limbo in their country of asylum (Garnier et al., 2020). Border closures and movement restrictions have also negatively impacted the capacity of international and other agencies working to assist migrants, asylum seekers and refugees to access the services they offer, including counselling, legal advice, referrals and lifesaving assistance (UNHCR and IOM, 2020). Some countries, such as Egypt, stopped issuing residency permits during lockdown, potentially pushing many migrants and refugees into irregular residency status (Centre for Migration and Refugee Studies, 2020b). Other countries, however, extended the validity of residency documents to guarantee migrants and refugees access to health and education, including the Maghreb region (Ribadeau Dumas, 2020), Jordan (Inter-Sector Working Group Jordan, 2020), and the United Arab Emirates (Fattah and Abu Omar, 2020). However, foreign residents stranded abroad due to lack of means to leave, or those willing to stay in the host state, remain exposed to any change in policy.

Furthermore, as income losses continue, the risks of migrants falling victim to trafficking and enrolling into militias to secure income may increase. Interviews carried out by the Mixed Migration Centre with migrants in Somalia and Yemen pointed to smugglers searching for alternative routes "to avoid authorities and checkpoints," which may increase risks for those travelling with them (Litzkow, 2020). Increased smuggling activities and ensuing abuse of migrants along the Eastern route between the Horn of Africa and Yemen was also reported.

Gender-based violence became reportedly more frequent during lockdowns. Female-headed households, which are more prevalent among refugees, are at greater risk as gender barriers and discrimination limit economic opportunities (CARE International, 2020).

Exacerbated xenophobia, waning solidarity and polarization of host societies

The pandemic also spurred general distrust and fear of the "other" within migrants' host societies. Unsurprisingly, foreign residents were designated as sources of infection. Xenophobic and hostile statements flurried across the region, which polarized host societies around the issue of migration. In the Gulf, while some acknowledged nationals' dependency on foreign labourers, others have expressed anti-immigrant sentiments (Courrier International, 2020; Darwish, 2020; Alshammari, 2020).

As highlighted in Section I, 64 percent of refugees to and within the region are concentrated in neighbouring crisis-affected countries, which adds to these countries' economic and socio-political burden. For example, in Yemen, where Somalis make up most of the foreign population, large parts of the population suffer dire conditions of starvation, malnutrition and constant risk of falling victim to air raids. In such a context, the sense of solidarity towards newcomers and foreign residents is waning. African migrants in general and Somali refugees in particular are increasingly seen as a burden, and the influx of refugees is perceived to be a drain on food and medical supplies (Al-Qaoud, 2020). As expressed by Somali migrants, Yemenis grew "tired of helping [them]" (Sanderson, 2020). A similar resentment against refugees was reported in crisis-hit Lebanon, and even in Jordan (Jansen, 2019).

In countries of origin

The crisis also unveiled migrants' situation vis-à-vis their governments. Initially, at the early stage of the pandemic, emigrants' particular vulnerability to the virus was compounded by the initial reluctance of countries of origin to repatriate and treat their possibly infected citizens. Among other issues, the closure of land, sea and air borders following the lockdowns in migrant-sending states also barred many nationals from returning to their own country (Ersan, 2020).

Migrants' relations with their home states put under stress

In migrant-sending countries, such as Jordan, Egypt and Lebanon, passenger flights were suspended and land, sea and air borders were closed by mid-March. Yet, repatriation schemes and registration platforms only started in May 2020 (on Jordan: Prensa Latina, 2020). Some Jordanian citizens were denied entry to the country after the border closed and remained stranded in the border area between Jordan and Saudi Arabia for weeks (Ersan, 2020). Repatriation schemes posed restrictions to returns to the three countries (on Jordan: Arab News, 2020b; on Lebanon: Houssari, 2020). Among these, plane tickets were not free (Royal Jordanian Airlines, 2020), and return expenditures could amount to very large, unaffordable sums for middle-class families (Gabboun, 2020). Initially covered by the government (Heyman, 2020), mandatory quarantine venues in hotels and medical supervision proposed by Jordan's army-run COVID-19 Crisis Management Cell, for instance, became available upon out-of-pocket payment (Al-Ajlouni, 2020). This added to the financial burden of many middle-class families prevented from returning to Jordan. Their residency permits having expired, these stranded nationals became irregular migrants in their Gulf host states (Gabboun, 2020). Like the other countries, Lebanon had to prioritize between various categories of stranded citizens (tourists, visitors, students, etc.), with emigrants left behind until June (Chehayeb, 2020). Delays in repatriation flights from Kuwait to Egypt also spurred migrants' violent discontent (Reuters, 2020a), despite Egyptian authorities reaffirming that emigrants in the GCC were their priority target (Egypt, Ministry of Immigration and Egyptians Affairs Abroad, 2020d). The Egyptian authorities promised to cover the costs of quarantine for returnees in collective accommodation (youth hostels, university dorms), but isolation in hotels was left to returnees' own expenses (Egypt, Ministry of Immigration and Egyptians Affairs Abroad, 2020h).

More generally, the policy among Middle East migrant-sending countries of encouraging citizens to emigrate to alleviate unemployment, channel remittances to local households and stimulate domestic consumption, goes hand-in-hand with a general lack of knowledge about their emigrated citizens, especially their numbers and characteristics (De Bel-Air, 2020).

Forced returns from GCC and restrictions on returns: a human rights and health risk

Some countries of origin were also forced to accept nationals returning from host states, which points to the asymmetry of relations between migrant-sending and migrant-receiving states. The Gulf States sent back many irregular migrants (Ethiopians from Saudi Arabia and Nepalis from Qatar, for instance) at the beginning of the pandemic, before the closure of borders and interruption of air transport (Budhathoki, 2020; Endeshaw and Paravicini 2020).

Many laid-off labourers also had to leave due to the dwindling of their resources and savings in their Arab host states, where governmental support schemes are most often reserved for nationals. It is therefore likely that such—directly or indirectly—forced exits may have contributed to the spread the virus in migrants' countries of origin (Agence France-Press, 2020a).

From the summer of 2020 until the time of writing in Q1 2021, all countries of immigration in the region have limited the entry of new migrants and permitted the re-entry of valid visa holders on the condition that they produced recent certificates of non-contamination of COVID-19 using a polymerase chain reaction (PCR) test, obtained just prior to departure.[22] Some countries (United Arab Emirates, Jordan) have imposed another PCR test upon arrival. The costs of these tests were incurred by the migrants themselves. Other guarantees were also requested, such as mandatory self-isolation for 7 to 14 days upon arrival, proof of health insurance (Oman, Lebanon) and sufficient means to cover one's COVID-19 treatment (in Lebanon). Additional restrictive measures were also applied to citizens of countries classified as "yellow" and "red" in Jordan, such as supplementary PCR tests during mandatory self-isolation and electronic monitoring bracelets (Trip.com, 2020). These requirements, though expected, complicate the migration process. Furthermore, they disrupt decades-old migration routes. Among these are cross-border circulation between neighbouring countries, for example between Jordan and Egypt (Roya News, 2020). No evidence has yet been reported to support such a hypothesis, but one can expect that some migrants might have attempted to enter countries of immigration illegally to avoid the COVID-19 control measures. Employers may also have wanted to bypass migrants' mandatory self-isolation period. In such a case, health control measures would prove counter-productive, by pushing migrants to take more risky migration paths and avoid health screenings.

22 At the time of writing, in November 2020.

III. Lower oil prices and economic slowdown

Situation in countries of immigration

The sharp decline in oil prices and the economic downturn caused by the COVID-19 outbreak have strained the finances of governments and businesses in the region. Decreasing public budgets further reduce investment (large construction projects) and demand for business (procurement, services, etc.). A contraction in employment, mass dismissals and salary cuts were also witnessed in private corporations and businesses, mostly impacting migrant labourers.

Jobs and income losses in countries of immigration

Across the six GCC member states, the major employer of migrants in the region, some experts forecasted for 2020 that employment "could fall by around 13 percent, with peak-to-trough job losses of some 900,000 in the UAE [United Arab Emirates] and 1.7m in Saudi Arabia" (Oxford Economics, 2020). Meanwhile, 250,000 foreign labourers had already lost their jobs in Kuwait by April 2020 (Kuwait Upto Date, 2020). In Dubai alone, 70 percent of business owners expected their companies to close before the end of 2020 (Naar, 2020).

All categories of workers were concerned by the dismissals, even the skilled and highly skilled. Furthermore, the suspension or delay in mega-projects and world-class events such as Dubai Expo 2020 is also likely to have affected other sectors, such as construction and logistics, impacting many engineers, architects and other skilled and highly skilled technicians. The aviation industry, another major employer of migrants, was expected to dismiss as many as 800,000 employees from the six Gulf States' national companies

(International Air Transport Association, 2020). As with the tourism, hospitality and retail sectors, which are major employers of foreign workers, the oil sector witnessed high employment contraction worldwide. This impacted the many skilled labourers from the region employed in these activities (Ayadi, 2020).

In Jordan, the fragility of the economy due to the prevalence of micro-, small- and medium-size enterprises, for example in construction, and the sector's reliance on informal foreign labourers, are likely to have had a significant effect on migrants' employment (L. Al-Ajlouni, 2020). No figures or projections were available at the time of writing the paper, but the many Egyptian labourers in Jordan are likely to have suffered a sustained impact of job losses. Apart from agriculture and domestic services (in gardening, guarding and security), Egyptian labourers in Jordan are employed in economic sectors such as construction and hospitality, two sectors which were hit by the economic downturn. However, it is difficult to provide figures assessing the impact of the economic crisis on the employment of Egyptians, since many are in informal situations in Jordan, as explained in Section I.

More generally, the frequency of informal, low-wage and short-term employment among migrant workers and refugees makes them particularly vulnerable to economic fluctuations, as well as unfair treatment by employers in oil-importing developing countries and in crisis-affected countries. A rapid assessment of the impact of the COVID-19 pandemic on vulnerable groups in the Jordanian labour market, including Syrian refugees, women and workers in informal employment, highlighted the negative effects of the lockdown measures and ensuing economic downturn on these workers. Surveyed Syrian refugees were among those hardest hit as a result of their largely informal employment situation—whether in relation to lack of written contracts, social security and health insurance coverage, or valid work permits (Kebede et al., 2020a). In Morocco, sub-Saharan African migrants, who largely rely on informal employment, also quickly lost their livelihood opportunities (Forum des Organisations de Solidarité Internationale issues des Migrations, 2020; Le Monde, 2020).

In Lebanon, in the midst of the months-long severe economic and political crises faced by the country, compounded by the global pandemic, a study carried out to assess the impacts of the COVID-19 pandemic on labour markets in the Arab States underlined the high prevalence of informality (absence of written contracts, paid leave, social security coverage or health coverage) for all labourers before the pandemic outbreak. Yet, the COVID-19 crisis had the worst effect on Syrian refugees, who were forced to accept lower wages and tougher working conditions. Eighty-four percent were permanently or temporarily dismissed from work due to the COVID-19 crisis, with almost twice the share of Syrians permanently laid off than Lebanese. Syrian households had less savings to cope with financial challenges (Kebede et al., 2020b). Domestic labourers also suffered from the spiralling crisis in the country. Employers went as far as abandoning female domestic workers in the streets and in front of the employees' embassies, which did not offer any shelter (Cheeseman, 2020). Most of these women, unpaid for months by their employers and often deprived of their belongings, were from Ethiopia, but many also came from other African and Asian countries (Makooi, 2020). The desperate economic situation of Palestinian refugees in the impoverished camps of Gaza and Lebanon is "deepening the hopelessness among Palestinian refugees," and even compelling some to be trafficked out of Gaza to flee to Europe on migrant boats (Arab Weekly, 2020).

Discrimination against migrants

Policies implemented by host states highlighted the discriminatory treatment of foreign labourers, as opposed to nationals. From Morocco (Le Monde, 2020) to the Gulf (Daily Tribune – News of Bahrain, 2020)—and in contrast to Europe, where protection schemes apply to all formal labourers— foreign employees are often excluded from unemployment insurance schemes and *ad hoc* governmental initiatives which supplement income losses or cover the wages of public and private sector employees (Oommen, 2020). Salary cuts in some Gulf States only affected foreign labourers, even in the governmental sector (Foxman, 2020). The United Arab Emirates' Ministry of Human Resources and Emiratization issued Ministerial Resolution No. 279 of 2020, which permits employers to reduce foreign employees' salaries due to the pandemic (Mehta, 2020).

Return and step migration

As Gulf States, like most Arab states, make employment a condition of foreigners' residence, the return from Gulf countries of migrants who have been made redundant could exceed 3.5 million people according to some forecasts; consequently, the numbers of residents were expected to decline by between 4 percent (in Saudi Arabia and Oman) and around 10 percent (in the United Arab Emirates and Qatar) (Mathew, 2020). As of early 2021, data confirmed a 4 percent decrease in the size of total Gulf populations (Arabian Business, 2021). Jadwa Investment (2020) forecasted the departure of around 1.2 million migrants from the Saudi labour market by the end of the year, mostly from the accommodation, food, administrative and support sectors (which includes rental and leasing activities, travel agencies, security and building services). The Saudi Ministry of the Interior also confirmed that an estimated 300,000 immigrants had left the Kingdom during the first semester of 2020, with 178,000 successful applications for *Awdah* (the government scheme to facilitate the departure of migrant workers to their countries of origin during the COVID-19 pandemic) processed between 22 April and 3 June (Copper-Ind, 2020a). By mid-July 2020, Kuwait claimed that over 158,000 immigrant workers had left the country since March, the majority Indians and Egyptians (Arab News, 2020d). Around 280,000 immigrants left Oman between January and November 2020, decreasing the migrant population by 16 percent.[23]

Some pessimistic scenarios forecasted the possible return of up to 1 million Egyptian workers from abroad, mostly from the Gulf States and Jordan, making up 3 percent of Egypt's active population (Abdo, 2020). By late June 2020, Jordan (Arab News, 2020c) and Tunisia (Ayadi , 2020) had each repatriated around 20,000 citizens, including students and visitors abroad, as well as returning migrants.

In the case of refugees unable to return to their home state, such as refugees from Sudan, step migration to third countries is the only solution. In Lebanon, where migrants' difficulties due to the economic crisis were compounded by the lockdown, Sudanese refugees stepped up their attempts at crossing over to Israel (Goldman, 2020). Sub-Saharan African migrants in Algeria and Libya, pushed out of these countries by the health and economic crises, were also found to emigrate to Tunisia in large numbers (Blaise, 2020). The economic crisis has therefore likely increased the vulnerability of irregular migrant workers from countries in crisis to smugglers and trafficking networks.

Challenges posed by migrants' return to countries of origin

The economic outcomes of the COVID-19 crisis have other, direct and indirect, impacts on migrants and their communities. On the one hand, many of these countries are not set up to reabsorb returning migrants. Migrants are often excluded from national schemes such as wage subsidies, unemployment benefits and social protection measures (Financial Times, 2020). On the other hand, the economic downturn and possible returns may have strained origin countries' capacities and desire to reintegrate migrant citizens into national economies.

Developing oil-importing countries were expected to be negatively affected by migrant returns, with a potential decrease in remittance inflows and increased domestic unemployment (World Bank, 2020b). These are compounded by the decline in oil prices—likely to decrease financing and investments by Gulf States, the largest investor in the Arab region—as well as in international assistance.

In Jordan and Egypt, for instance, economies were already fragile before the crisis. According to a study released on 29 May 2020 by the Institute of National Planning, a government institute, Egypt's unemployment rates were expected to increase from around 8–10 percent before the crisis to 11 percent, or even 16 percent, depending on the economic crisis scenario faced by the country; according to governmental estimates, 1.2–2.9 million Egyptian citizens were estimated to possibly lose their jobs, 824,000 of whom were already unemployed as of June 2020 (Mostafa, 2020).[24] Yet, the size of the Egyptian economy and population allowed authorities to envisage the reintegration of Egyptians returning from abroad into Egypt's economy (Egyptian Streets, 2020). Some initiatives, coordinated by the Egyptian Ministry for Immigration and Egyptians Abroad, were implemented to facilitate this reintegration, for example, the "Enlighten your Country" campaign. The initiative was launched by the Immigration Ministry in June 2020, in cooperation with several other ministries and public bodies (Egypt, Ministry of Immigration and Egyptians Affairs Abroad, 2020b). It aimed to assess the profiles, locations and competencies of returned migrants, to establish appropriate training programmes and provide job opportunities to returnees that are compatible with their capabilities and contribute to the sustainability of development in the region of residence (Egypt, Ministry of Immigration and Egyptians Affairs Abroad, 2020a). Other initiatives aim to provide employment opportunities to returnees (Egypt, Ministry of Immigration and Egyptians Affairs Abroad, 2020f and 2020i). The Ministry also supports returnees' attempts to remigrate abroad (Egypt, Ministry of Immigration and Egyptians Affairs Abroad, 2020e) and renew their documents (Egypt, Ministry of Immigration and Egyptians Affairs Abroad, 2020c). It is likely that reintegration schemes will take time to prove their effectiveness. Moreover, advertised job training and openings seem to target educated returnees, rather than rural, and more generally, low-skilled citizens, with less or no access to online information platforms.

23 Author's calculation, based on data from National Centre for Statistics and Information (accessed December 2020).

24 However, the exact definition of employment is unclear: does it only consider individuals who are employed in market economic activities as employed, or does it consider as employed individuals who engage in market and subsistence economic activities? This affects the definition, and measurement, of unemployment (Arezki et al., 2020: 27-29).

In Jordan, the unemployment rate stands at 19 percent of the Jordanian labour force according to official statistics (Jordan, Department of Statistics, 2020). From the onset of the crisis until early July 2020, 150,000 Jordanian private sector employees lost their jobs in the Kingdom (Fadila, 2020). The situation is likely to deepen if flows of return migration reach the anticipated threshold of 100,000 (20 percent of an estimated 500,000 Jordanian workers abroad) (Jordan Times, 2020). Meanwhile, Jordan's finances may not benefit much from returnee savings, as salary cuts, unpaid leave and lay-offs, as well as travel and quarantine costs, have exhausted many migrants' assets. Many returnees mentioned difficulties in even retrieving their end-of-service benefits from abroad (Gabboun, 2020).

Jordanian authorities claimed that they were planning to integrate returning migrant expertise into the local economy (Jordan Times, 2020). Public sector employees on secondment abroad (for example, the many Jordanian teachers in Gulf States) may have returned to their jobs. The Labour Ministry was working to link private sector employers to job seekers through directorates and electronic platforms. The Ministry also coordinated with the Investment Promotion Authority to open investment opportunities for returnees, even offering loan funds to support small- and medium-sized enterprises (Fadila, 2020).

However, the structure of the economy, mostly propelled by labour-intensive, low value-added economic sectors such as industrial subcontracting, assembly and textile manufacturing, is not conducive to the employment of skilled and highly skilled jobseekers (UNDP, 2016, Chapter 7). It is therefore unlikely that returnees from the Gulf would be able or would want to compete with foreign workers currently in Jordan, who are mostly employed in low-skilled, low-wage activities, as demonstrated in the first section of the report. It is more likely that most returnees would live off their savings, waiting to remigrate to the Gulf or elsewhere.

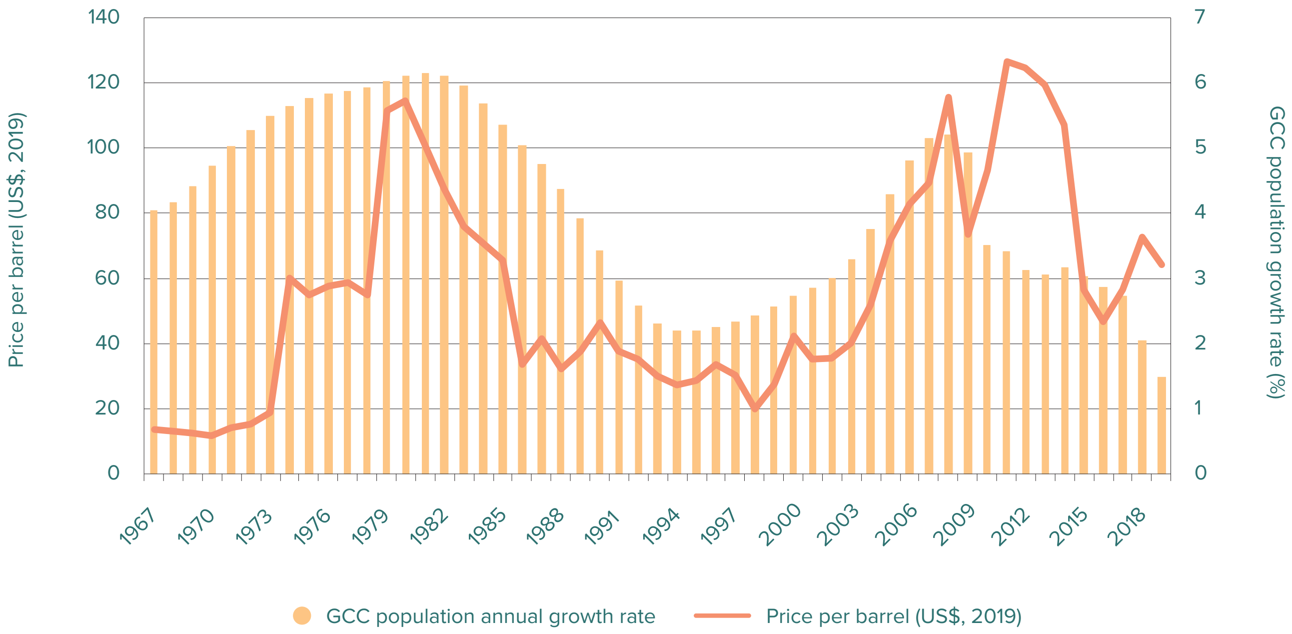
As for Lebanon, a country with significant social, economic and political challenges, the financial crisis that erupted with the popular demonstrations of October 2019, added to the economic downturn due to the pandemic, can only be exacerbated by the return of emigrants and the drop in remittances, which made up 12.7 percent of the country's GDP and amounted to $7,467 million in 2019 (World Bank, 2019d). Unemployment figures are not available for the country, but it is unlikely that the current economic climate will encourage returnees to stay in Lebanon and spend, let alone invest, their savings. The deterioration of the socio-political climate and deepening recession compelled increasing numbers of despairing citizens to emigrate from Lebanon (Bajec, 2020), a trend reinforced by the August 2020 blast in Beirut.

Prospects for remigration to countries of immigration

Some migration specialists are confident that migration will resume as the crisis recedes and oil prices improve. Massive return migration to home states is feared but has not yet happened; figures of job losses are also larger than figures of departures, so far. Some, especially low-skilled immigrants, may have also remained in the Gulf irregularly (Centre for Migration and Refugee Studies, 2020a).

However, changes in Gulf States' hiring policies may have a decisive impact on future migration trends in the region. Figure 3 shows that until early 2011, population growth rates in the GCC region were relatively well correlated to the fluctuation of oil prices. However, since then, the two have evolved separately, which suggests that hiring and migration policies are no longer solely driven by economics, but also plans to develop labour-intensive activities. Political concerns emerged, which spurred drastic changes in the size and structure of migrant stocks and flows.

Figure 3. Oil prices and demographic growth rates in the Gulf Cooperation Council region (1967–2019)



Source: United Nations (2019b), GCC Statistical Center (2019) and British Petroleum (2019).

In fact, using the crisis as an opportunity, GCC governments are currently hastening pre-crisis policies of replacing migrants with nationals to curb their citizens' unemployment and address the "demographic imbalance" between nationals and immigrants. One such example is the *Nitaqat* programme, ongoing in Saudi Arabia since 2011, which bars an increasing number of employment sectors to foreign employees, to the benefit of nationals. A hike in foreign worker levies and dependent and other fees since 2017 has made foreigners more expensive to employ; as a result, Jadwa Investment estimated that about 2 million immigrants had left Saudi Arabia since 2017 (Copper-Ind, 2019). Job nationalization, especially in the public sector (Al-Monitor, 2020; Agence France-Press, 2020b), is accelerated everywhere, except for Qatar and the United Arab Emirates. Hiring agencies in sending states, such as Egypt, have experienced a reduction in opportunities for their nationals in the Gulf since 2017 (Rabie, 2019), especially for low-skilled labourers. Ongoing ambitious reforms and masterplans aiming to make Gulf States "knowledge societies", which are less dependent on oil revenues, indeed prioritize the hiring of highly skilled foreign workers (Kingdom of Saudi Arabia, 2020; Qatar, General Secretariat for Development Planning, 2008).

The crisis also presented an opportunity to drastically transform the structure of the resident population. To correct the demographic dominance of immigrants in the resident population, some Kuwaiti lawmakers proposed a draft bill suggesting a quota system, according to which the share of foreigners would make up a maximum of 30 percent of the total population. The numbers of Indian workers should not exceed 15 per cent of the overall Kuwaiti population, while Egyptian immigrants should account for a maximum of 10 per cent (Al-Khamis, 2020). The implementation of the quota system would have meant that Egyptians would only number 140,000 in Kuwait, down from at least 670,000 before the COVID-19 crisis (GLMM, 2019b), while 800,000 Indians would have been forced to leave Kuwait. Kuwait's National Assembly eventually approved only parts of the law.

Such policy choices pose several questions. The effects of the first job nationalization policies on future economic growth in the countries concerned (Oman and Saudi Arabia) is yet to be assessed. One may also wonder if GCC states and their model of "dual societies" and "dual economies", structurally based on segregation between nationals and foreigners, will remain attractive for highly skilled foreign workers. The economic crisis, the reduction in incomes and the repatriation policies implemented by some Gulf countries, as well as the lack of social protection, have forced many middle-class migrants to leave the Gulf region (Fattah and Abu Omar, 2020). Gulf nationals may not be able to replace the foreign labour force in all posts, due to lack of skills and experience. Labour costs will also increase for employers if nationals replace foreign labourers. Gulf countries may thus experience setbacks in implementing their ambitious reform plans, without reflecting on how to retain or re-attract some foreign workers (Siddiqui, 2020).

Possible impacts of the global economic downturn on refugees in the region: towards a contraction of international and country-to-country aid?

The budgets of international agencies in charge of protecting refugees have been tight for decades. Yet they are likely to decrease further as donors shift priorities or experience cash shortages due to the current economic downturn. The mandate of UNRWA covers 5.6 million refugees from the State of Palestine and their descendants in the West Bank, the Gaza Strip, Jordan, Lebanon and Syria. The agency oversees primary and vocational education, primary health care, relief and social services, microfinance, and emergency response, including in situations of armed conflict. It also manages and maintains infrastructure in 58 refugee camps, which concentrate one third of the registered Palestinian refugees in the five zones (UNRWA, 2019b). UNRWA budget and assistance capacities have been short for years. The COVID-19 pandemic pushed most donor countries into recession, while its economic effect increased the assistance needs among refugees, in terms of food and basic items, as well as health (Luck, 2020; Arab Weekly, 2020; Atrache, 2020). Other international agencies involved in the region, such as UNHCR, are suffering the same financial drains, while needs are expanding (Chulov, 2020).

For years, the GCC countries have been a major supplier of aid to vulnerable populations in the region. Saudi Arabia, for instance, is one of the largest aid providers to Palestinian refugees (Al-Arabiya English, 2020) and the third largest donor to UNRWA (UNRWA, 2019a), while Qatar supplied aid to Gaza through the Hamas movement (Rasgon, 2020) and through UNRWA (UNRWA, 2020). Kuwait was the sixth largest donor to UNHCR (Hagagy, 2017). Gulf States' governmental organizations and NGOs, as well as royal non-profit organizations, are also major supporters of Syrian refugees, especially in Jordan (Ababsa, 2016). In particular, the United Arab Emirates channelled aid packages to Syrian refugees in Lebanon, Jordan (Rizvi, 2019), Iraq and Egypt (The National, 2019). Aid from the United Arab Emirates has included health care provision and the construction of field hospitals and refugee camps such as Mrajeeb Al Fhood—a joint Jordanian-United Arab Emirates camp which currently runs at $30 million (United Arab Emirates, Ministry of Foreign Affairs and International Cooperation, 2020). The United Arab Emirates also sent medical assistance to Sudan, including for refugees (Gulf Today, 2020).

However, the then shrinking revenues of oil-exporting countries, due to the fall in oil prices and subsequent effects, may reduce aid allocations that support refugee communities. The contraction of Gulf States' grants to refugee protection had not been felt, by the end of 2020. However, changes of policy towards countries hosting refugees in the region may emerge. For instance, since oil prices began to fall, Gulf States have been exploring ways to limit their country-to-country assistance (Hassan, 2020). Given the large amounts of aid and loans channelled to major refugee host countries in the region, such as Egypt and especially Jordan (Partridge, 2018), such policies would necessarily impact refugee populations in those countries.

IV. Impact of the twin shock on remittances

The twin shock of COVID-19 and falling oil prices had important repercussions for remittance flows to and from the region.[25] As previously discussed, oil-producing countries in the region rely heavily on foreign workers,[26] a sizable share of which are Arab nationals, who are likely to have seen their incomes drop or disappear, affecting both their own and their origin country households' standards of living, as well as foreign exchange reserves at the national level. While global in scope, the economic downturn has affected countries and sectors in heterogeneous ways, warranting a closer inspection of the vulnerabilities to the likely negative impacts of the pandemic on remittance flows and—down the line—well-being in countries that rely on remittances. This part of the paper aims to analyse the likely consequences of the twin shock, focusing on the channel of remittances.

Due to the lack of precise measurement on remittance flows, and an inherent difficulty in capturing them exhaustively and in real time, we still do not know exactly how remittances have been affected by the twin shock. At a global level, there are, however, clear indications of a downturn: during the last two weeks of March 2020, MoneyGram saw an 18 percent drop in its business compared to the same period in 2019, and on the whole the company experienced a 10 percent drop in revenue in the second quarter of 2020, although revenue

25 Countries included in the region are Algeria, Bahrain, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Somalia, Sudan, Syria, Tunisia, United Arab Emirates, West Bank and Gaza, and Yemen.

26 The six GCC countries hosted 6.3 million migrants from the Arab Region out of 30 million international migrants in 2019 (United Nations, 2019).

growth from money transfers in June alone (on a year-over-year basis) was positive (MoneyGram 2020a; MoneyGram, 2020b). During the same period, Western Union saw an 8 percent drop in customer-to-customer transactions, although growth also picked up in June (Western Union, 2020). As can be seen in Table 1, both companies had yet to see growth in total revenue by the end of 2020, although transactions picked up in the third and fourth quarters.

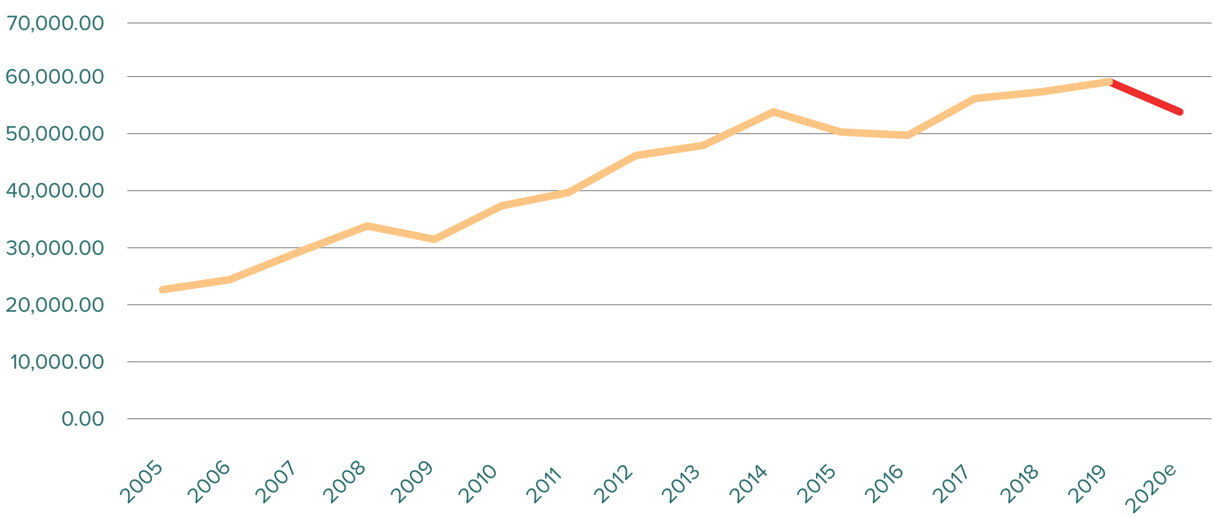
The World Bank forecasted a slower but more prolonged decline in remittances in the Middle East and North Africa (MENA) region (World Bank, 2020d). The inflow of remittances to the Arab States reached around $60 billion in 2019, and was estimated to drop to $54 billion in 2020 (see Figure 4). Even if these predictions end up being worse than actual decreases, the situation is undoubtedly serious. All the more so, particularly since remittances in normal times are said to be countercyclical, acting as an informal safety net for households that are subject to shocks (Frankel, 2011). This time, however, the shock is global, and for many migrant-origin households, decreasing income will likely not be compensated by transfers from migrant members, who have also seen their income fall.

Table 1. Growth in revenue and transactions, Western Union and MoneyGram (Q1–Q4, 2020)

	Western Union		Moneygram	
	Total revenue growth (year-on-year)	Total transaction value (year-on-year)	Total revenue growth (year-on-year)	Money transfer revenue (year-on-year)
1st quarter	-11%	-3%	-8%	-6%
2nd quarter	-17%	-8%	-14%	-10%
3rd quarter	-4%	6%	0%	5%
4th quarter	-3%	6%	0%	4%

Source: Author's compilation using quarterly press releases from the two companies.

Figure 4. Cumulated remittance inflows to the Arab region (US$ million)



Source: World Bank (2020c) Migration and Remittance Data.

Note: The remittance data reported by the World Bank only **systematically** cover officially recorded remittances and, therefore, do not **systematically** include remittances sent through informal channels. The red line factors in the World Bank forecast

A note on measuring remittances

The measurement of remittances is far from straightforward. What is captured by the commonly accepted definition of remittances, namely personal transfers—formal or informal—destined to alleviate income constraints in origin households, is difficult to measure. In balance of payment statistics, remittances are composed of both *personal transfers* and *employee compensation*. The salaries of cross-border workers or temporary workers, as well as personnel of embassies and international organizations, thus contribute to the overall category of remittances in the balance of payments. Employee compensation measured in this way is based on the recipient's residency and does not distinguish money spent in destination countries from money sent back to origin countries. Closer in spirit to what is implied by remittances in this section, personal transfers reflect those transfers that occur between residents of two different countries, whether they reflect transfers in cash or in kind.

Compiling data on personal transfers is not an easy task, however, given the multitude of channels through which money may be funnelled to destination countries. The International Monetary Fund (IMF) compiles data from central banks who may (or may not) rely on models or surveys from money sending operators, banks and wider labour force or household surveys to estimate the flows of personal transfers. Surveys carried out on money transfer operators can, by construction, not account for alternative, informal cash transfers, such as those based on trust and social networks.[27] Household surveys are not regularly carried out in all countries and are not directly tailored to measuring remittances.

Comparability of remittances in space and over time is made difficult through the limitations in data collection which plague remittance statistics, and official remittance figures such as those compiled by the IMF and the World Bank should therefore be taken as indicative. As an example of heterogeneity in data collection, a survey on central banks run by the World Bank (Irving et al., 2010) found that 43 percent of central banks attempted to measure informal flows in some way or another. Another paper found that a large share (perhaps 80 percent) of growth in remittances in recent decades can be attributed to changes in measurement rather than actual growth in transfers (Clemens and McKenzie, 2018). In this paper, when using the term remittances, we refer to formal or informal personal transfers from migrants to recipients in their origin countries, rather than the broader definition of remittances from the balance of payments, which includes employee compensation. In most cases, the two are very similar, but in some contexts the gap is large. Notably in the State of Palestine, salaries of the many Palestinians commuting to work in Israel contribute largely to the compensation of employees (see Figure 5).

The importance of remittances in the Arab region

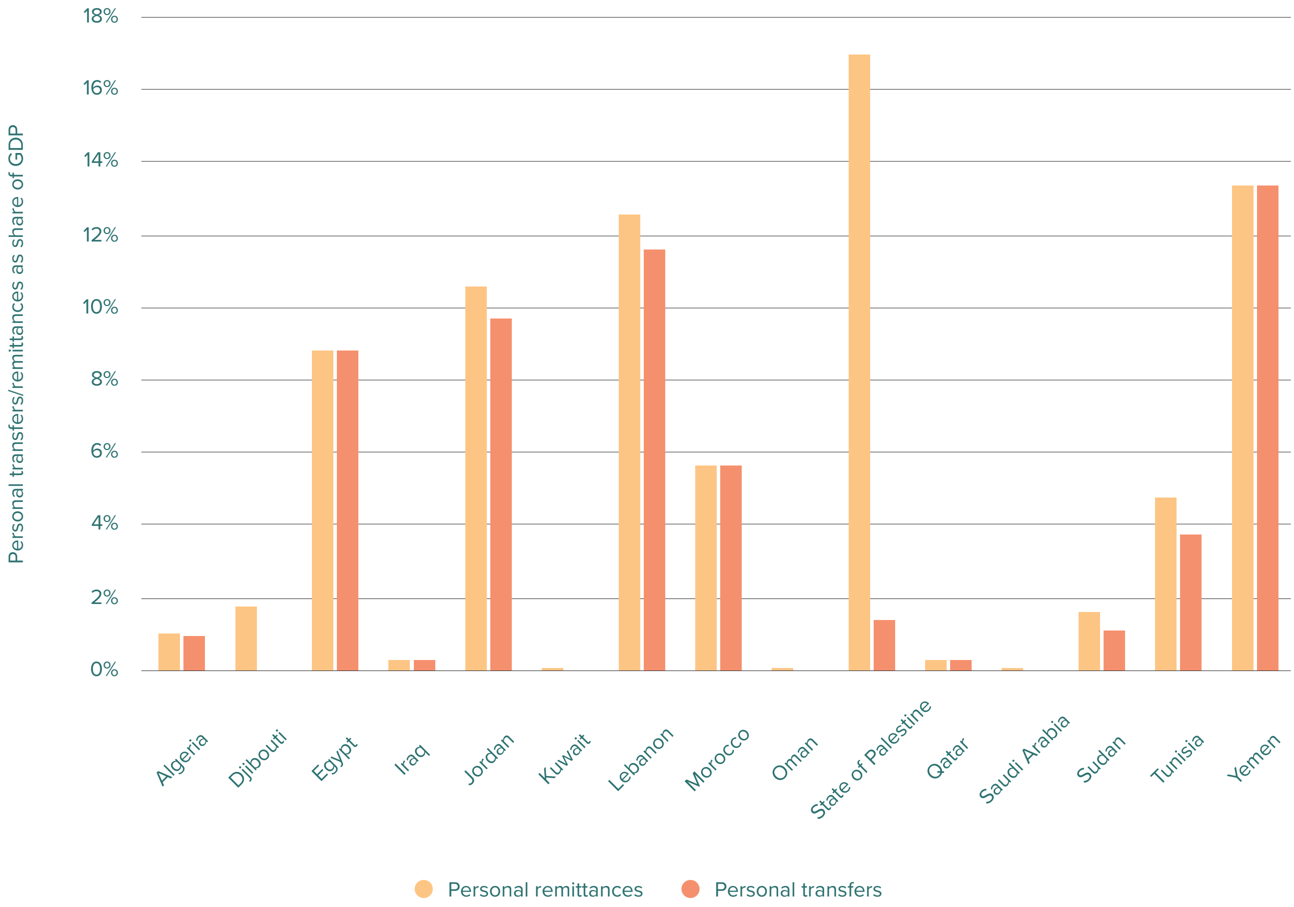
In terms of remittances received, Figure 5 illustrates the diversity of situations prevailing in the region.[28] While inward flows of remittances represent an insignificant portion of GDP in countries like Saudi Arabia, Oman or Qatar, they exceed 10 percent of GDP in Jordan, Lebanon and Yemen. These are all labour-exporting countries, although some also have a sizable immigrant population (Lebanon and Jordan in particular, hosting many Syrian refugees in addition to a long-term migrant population). The Maghreb countries represent an intermediate case, with personal transfers as a share of GDP being relatively unimportant in Algeria (1 percent of GDP and declining), and more important in Morocco and Tunisia (5.9 percent and 3.8 percent respectively). The regional average for personal transfers stands at 3 percent.[29]

27 Transfers sent via the *hawala* system make up an important share of remittances in some contexts, such as Somalia. In countries like Algeria, most transfers are hand-to-hand through visiting family members or friends.

28 The aggregate data does not allow for a gendered analysis of remittance receipts. According to Kunz (2008), the literature on remittances has framed itself as gender-blind, carrying with it implicit stereotypes such as the fact that men send less in remittances than women, that women receiving remittances make better use of them than men, or that women are mainly passive remittance receivers. Although an important question, this paper's main objective is not to analyse remittances from a gender perspective.

29 Based on the World Bank regional classification, including Iran and excluding Somalia and Sudan.

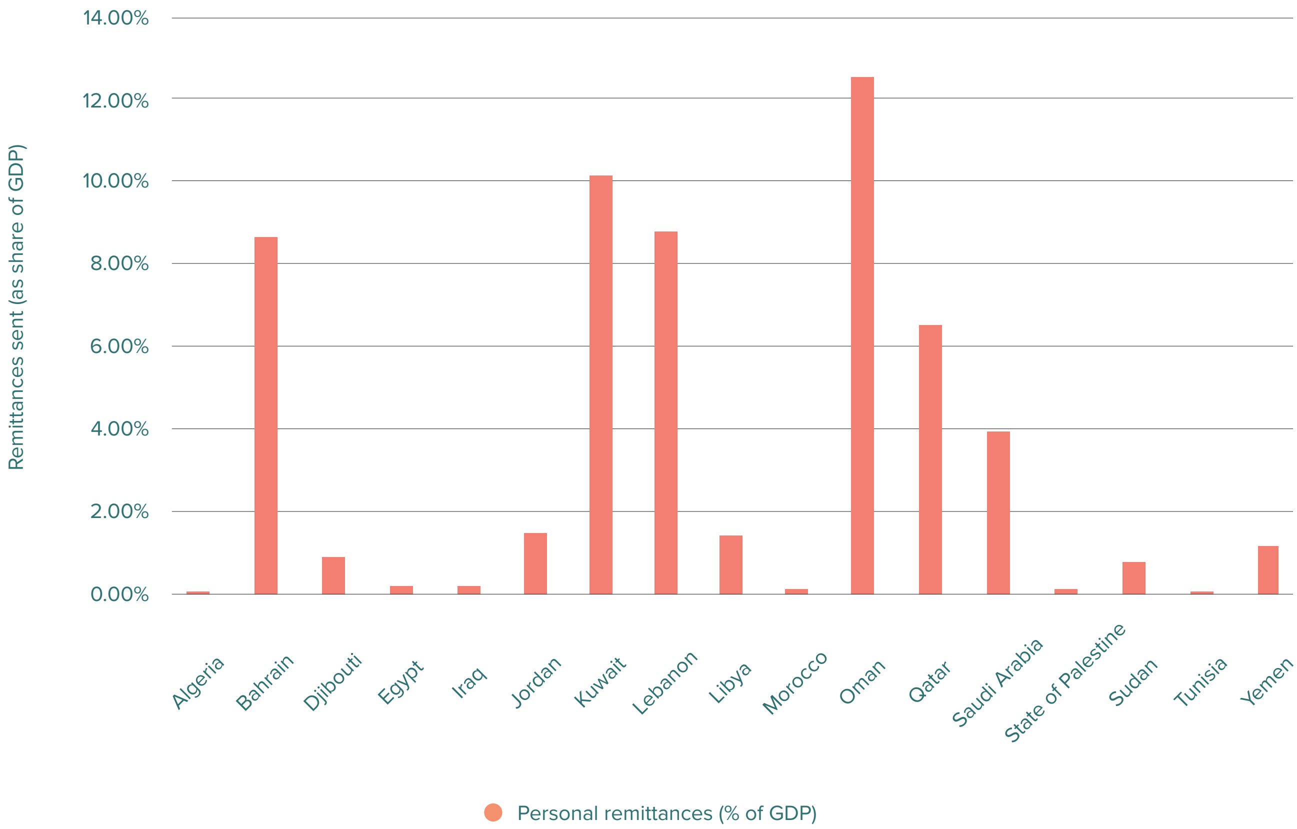
Figure 5. Remittances and personal transfers as a share of gross domestic product (receipts, selected countries)



Source: World Bank (2019b). Most recent available year: 2019 (Djibouti, Egypt, Iraq, Kuwait, Morocco, Oman, Qatar, Saudi Arabia); 2018 (Algeria, Jordan, Lebanon, State of Palestine, Sudan, Tunisia); 2016 (Yemen). No recent information on personal remittances or personal transfers for Bahrain, Libya, Somalia, Syria or the United Arab Emirates was available. No recent data on personal transfers was available for Djibouti, Kuwait, Oman and Saudi Arabia. Personal remittances: personal transfers (cross-border flows between individuals) + employee compensation (salaries of cross-border workers and employees of embassies and international organizations). Personal transfers: transfers between individuals residing in different countries, whether in cash or in kind.

We expect the pattern of Figure 5 to be reversed when looking at remittance outflows. The countries where remittance inflows represent very small shares of GDP—Oman, Qatar, Saudi Arabia, for example—are some of the region's largest labour force importers. This is indeed the case in Figure 6, where GCC countries such as Bahrain, Oman, Qatar and Saudi Arabia dominate. More than being oil-exporting countries, these countries are also among the wealthiest in the region in terms of GDP per capita, with GCC countries all having a GDP per capita above the world average, while the remaining Arab countries lie below.

Figure 6. Personal remittances as a share of gross domestic product (sent, selected countries)



Source: World Bank (2019a). Paid remittances. Most recent year: 2019 (Morocco, Qatar, Saudi Arabia), 2018 (Bahrain, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Oman, State of Palestine, Sudan, Tunisia), 2017 (Algeria), 2016 (Yemen), 2012 (Djibouti). No data were available for Somalia and the United Arab Emirates.

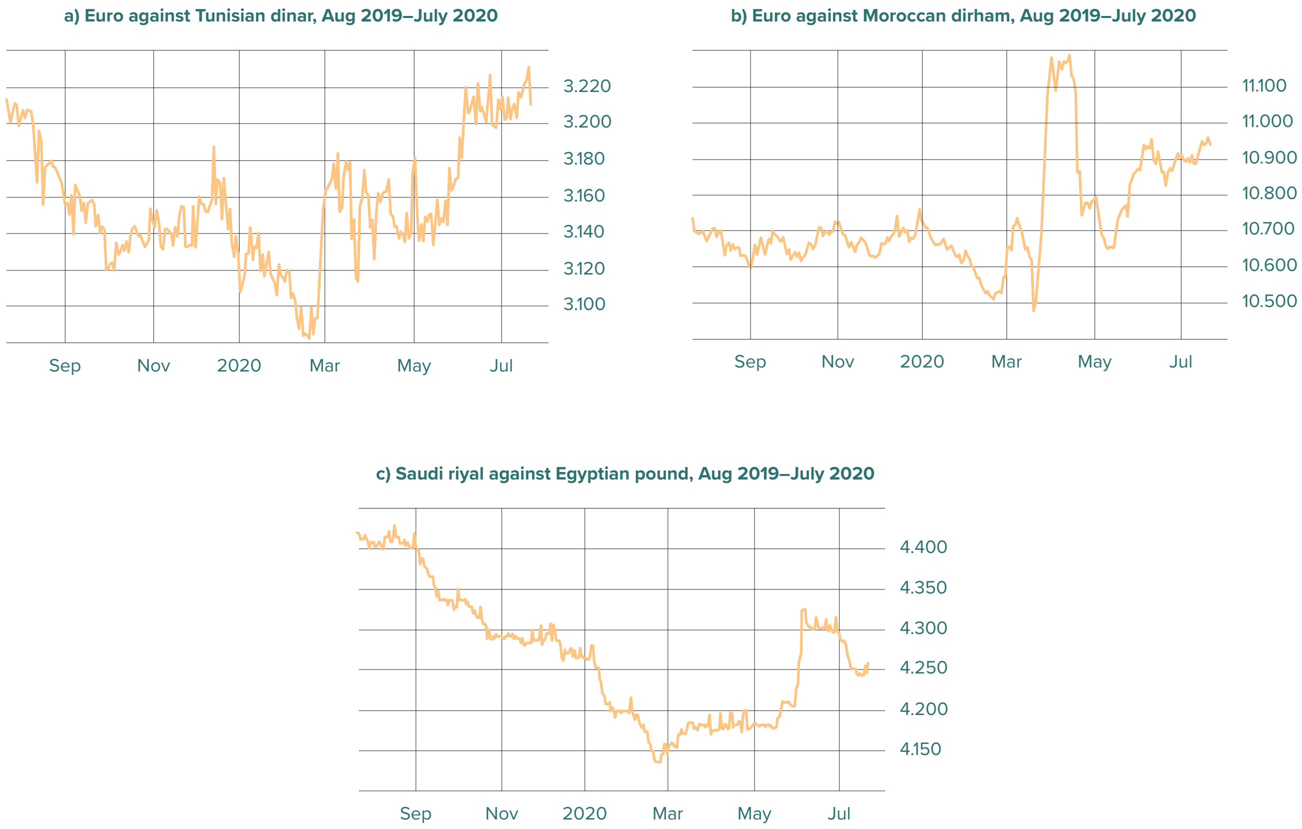
The socio-economic impact of the economic downturn on remittances due to the twin crises should thus be considered from two angles. First, decreasing incomes in destination countries (whether Arab or not) lead to decreased remittances that cause income to fall in remittance-receiving countries. Countries like Egypt, Jordan and Yemen, with a substantial number of workers in GCC countries, are likely to suffer in this regard. For instance, Jordan's Central Bank figures for the first quarter of 2020 indicated a 6 percent decrease in remittance inflows when compared with the same period in 2019. Second, decreasing incomes in destination countries directly affect the migrant population of those countries, many of whom have a long-standing presence in the countries and are an integral part of society. The extent to which their situation worsens depends on the extent to which their livelihoods can be maintained during the crisis, and depend on a combination of policy measures, sectoral resilience and individual savings behaviour. They also depend on whether their remittances to "home" countries—themselves subject to economic turmoil—are maintained or not.

A natural question to ask is that of the overall vulnerability of remittances to Arab countries during the current global pandemic. It is known that remittances tend to fall during global economic downturns. The 2009 financial crisis induced a fall in remittances to developing countries of 5.2 percent (Sirkeci et al., 2012). This was, however, nowhere near the falls in private equity or foreign direct investment, such that remittances proved to be among the least volatile flows in times of crisis. This time is likely to be different, however, since the job and wage losses associated with lockdowns and halts to supply chains are much more severe than they were in 2009. In other words, the present crisis is one of the real economy, rather than a financial crisis with repercussions on the real economy.

The World Bank estimate of an 8 percent drop in remittances for the region (World Bank, 2020c)[30] would imply dire consequences for households that are dependent on remittances, the share of which varies strongly across countries in the region. Afrobarometer data suggest that 2 percent of households in Tunisia and 3 percent of households in Morocco are very dependent on remittances, with another 20 percent (Morocco) and 14 percent (Tunisia) stating that they are a bit or somewhat dependent (Kalantaryan and McMahon, 2020). This figure can be compared to Somalia, where some 7 percent of households declared remittances to be their main source of livelihood, and more than 20 percent declared it to be their main source of income (see section on migrants and remittances in the Somali High Frequency Survey).

Furthermore, the World Bank estimate is made in dollars and, as such, may overstate or understate flows in national currencies. Currency appreciations or depreciation may worsen or dampen the shock. Figure 7 shows that the Moroccan dirham and the Tunisian dinar have both depreciated with respect to the euro since March 2020 (around 3 percent for the Tunisian dinar and 6 percent for the Moroccan dirham), implying that transfers from Europe are worth more in local currency. This exchange rate shock is bound to offset some of the negative impact on flows when measured in local currency. Similarly, the Egyptian pound has lost value to GCC currencies, counteracting the drop in remittances for Egyptian recipient households. For flows between Gulf countries, Jordan, Lebanon and Iraq, such an effect can only exist very marginally since all currencies (except the Kuwaiti dinar) are pegged to the US dollar.[31]

Figure 7. Exchange rates, August 2019–July 2020 (selected currencies)



Source: Trading Economics (2020).

30 Again, this is based on the World Bank MENA country group, which include Iran and excludes Sudan and Somalia.

31 It should be mentioned that the Lebanese pound, although officially pegged to the dollar, also evolves at a black market rate, which has unravelled in the last year, implying that remittances are now worth three times as much in local currency (LebaneseLira.org, 2020).

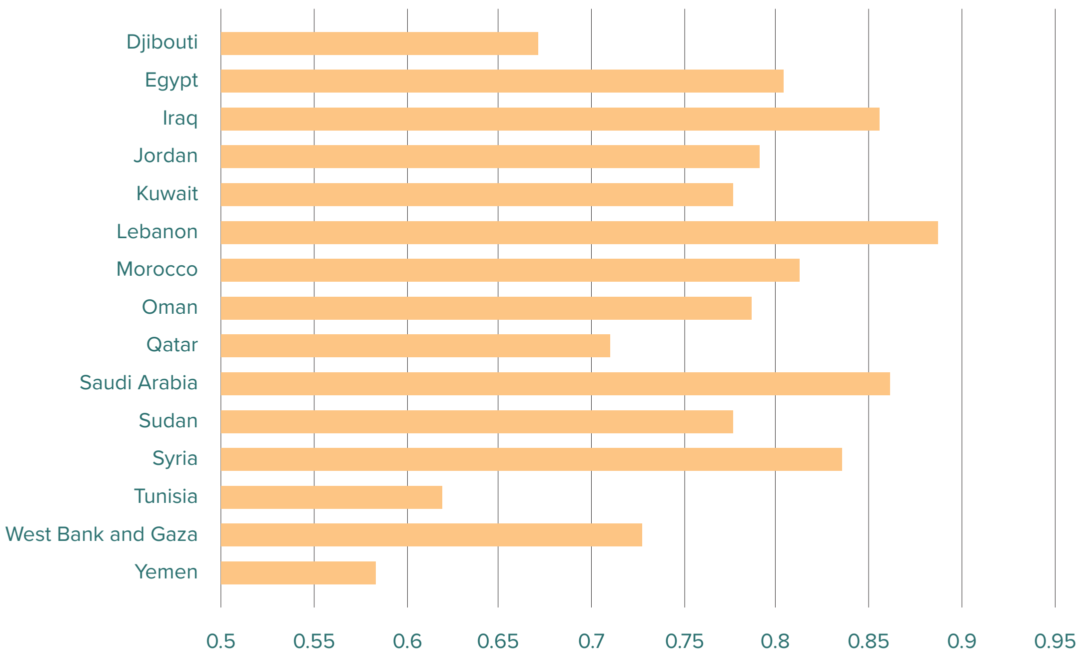
Vulnerability of Arab emigrants in destination countries

To assess the vulnerability of countries and the prospective socio-economic impacts that may be anticipated for households with emigrants, we will provide an overview of the countries in which migrants from the region are most commonly living, and the sectors within which they work. Since such a general picture does not suffice to draw conclusions at the country level; we will later provide illustrations from individual countries relying on microdata.

A first indicator of vulnerability is the remittances diversity index (Kalantaryan and McMahon, 2020). This index, previously used to assess the diversity of migrants in terms of countries of origin (Ortega and Peri, 2014), represents the probability that two dollars taken out of the total amount of remittance inflows come from two different sources. The higher the index, the more diversified remittance inflows are in terms of origin countries.[32] In the region, countries like Syria, Iraq and Lebanon have high index values, indicating widespread diasporas (Figure 8). On the other hand, countries like Yemen, and to some extent Tunisia, rely on remittances from a smaller set of countries (for Yemen, essentially Gulf countries with Saudi Arabia as the main supplier).

Given that the pandemic is global in scale, one might argue that diversity should not matter. However, the pandemic has hit different areas of the world in different months, and lockdowns and relief measures have been enacted at different times. Having a broader set of income sources may thus provide better protection against the most acute falls in remittances. For the region, this might not matter that much, however, since two regions dominate as remittance sources: Europe and the Gulf. Within those regions, the evolution of the pandemic and the ensuing policy responses happened roughly during the same time period, and recipient countries tend to receive most of their remittances from one or the other group of countries. Nevertheless, divergent policy measures in Europe during the periods of "second" and "third" lockdowns may call into question the assumption of homogeneity within the source regions in the medium term.

Figure 8. Remittances diversity index, Arab countries (2017)



Source: Author's computations from the World Bank (2017) Bilateral Remittance Matrix.

32 A value of 0 indicates that the country receives remittances from a single source country. A value of 1 indicates that the country receives an equal amount of remittances from all countries in the world. The distribution of the index is however skewed towards a value of 1, with very little diversity required to achieve a score higher than 0.5.

Oil-exporting countries

Oil-exporting countries in the region tend to be net labour force importers, and therefore send more remittances than they receive. Indeed, the populations of GCC countries are made up of between 38 percent (Saudi Arabia) and 89 percent (Qatar) of non-nationals (GLMM, 2018a), with limited or sometimes impossible access to citizenship. The lion's share of the foreign population in GCC countries comes from Asia, with countries like Pakistan, Nepal, India, Sri Lanka and the Philippines being major labour force exporters to the region. Migrants from the region are, however, numerous as well, with significant numbers of Egyptians, Jordanians and Yemenites working in GCC countries.

The type of work carried out by migrants from Asian and Arab countries is likely to vary, although data from the region tends not to distinguish foreigners by country or region of origin. Data from Kuwait and the United Arab Emirates, however, are available (Annex, Table 12 and Table 13) and show that Asians in both countries are less likely to work as professionals, legislators, senior officials and managers than non-GCC Arabs, yet they are more likely to be service or sales workers. Also, data on wages for selected high-skilled occupations show that in similar occupations, Asians tend to earn less than Arabs in all countries in the region (GLMM, 2018a).

While GCC countries all rely heavily on foreign labour, the remaining oil-producing countries (Algeria, Iraq and Libya) do not fit this picture. While the latter two have seen their societies plunge into chaos in recent times, and are included in the fragile country group, Algeria distinguishes itself from GCC countries by having a large emigrant population, and relatively few immigrants, such that remittances received outweigh remittances sent. Despite the large number of Algerians abroad, remittances are of fairly little importance in the balance of payments. The cause is likely that emigration took place on average a relatively long time ago (Meynier and Meynier, 2011), and was often related to independence or (more recently) the Algerian civil war.[33]

In GCC countries, given the sheer size of the foreign labour force, the COVID-19-related lockdowns are generating income losses and layoffs for workers who are often without social protection. In some cases, returns to origin countries have been organized, sometimes with the involvement of origin countries.[34]

Unfortunately, microdata from GCC countries are not publicly available and there is little information on the distribution of Arab non-nationals in the workforce. A look at the sectoral distribution of migrants, however, suggests that a majority work in sectors likely to see their operations cease during confinement. Table 2 shows that manufacturing, construction, wholesale and retail trade alone account for 58 percent of migrant employment in Saudi Arabia, equivalent to some 4.3 million migrants. While these figures represent the total number of foreign workers, we also know from Egyptian survey data (Economic Research Forum, 2019) that roughly one third of Egyptian migrants work in the construction sector, and that an overwhelming majority do so in GCC countries. Both falling oil prices and government issued lockdowns are an obvious threat to these sectors, and there have been reports of both blue collar and white collar employees from Egypt and Jordan leaving the region rather than accepting large wage cuts or long periods with frozen wages.[35] At the same time, the crisis has brought back enthusiasm for workforce nationalization policies in the region, posing a long-term threat to the viability of foreign skilled labour, and thus to migrant flows from countries such as Jordan, Lebanon and to a lesser extent Egypt (Mazzucco, 2020).

33 As stated in Section I, differences in central banks' measurement methodologies may account for differences in the number of remittances reported. It is very difficult, however, to assess precisely how said methodological differences would impact reported estimates, even if the precise methodologies were known.

34 Islamabad reportedly wished to repatriate some 40,000 Pakistanis in the United Arab Emirates who have registered to return home (Reuters, 2020b). Kuwait launched an amnesty programme for undocumented workers, who were allowed to return home despite overstaying their visas.

35 The Jordan Chamber of Commerce estimated in May 2020 that some 100,000 citizens (20 percent of the Jordanians working abroad) would be returning to the country (Jordan Times, 2020).

Table 2. Sectorial distribution of foreign workers, Saudi Arabia (2016)

Agriculture, forestry and fishing	**305,824**	4.2%
Mining and quarrying	**36,341**	0.5%
Manufacturing	**869,623**	11.8%
Electricity, gas, steam and air conditioning supply	**27,299**	0.4%
Water supply; sewerage, waste management and remediation activities	**23,232**	0.3%
Construction	**1,882,586**	25.6%
Wholesale and retail trade; repair of motor vehicles and motorcycles	**1,513,669**	20.6%
Transportation and storage	**274,194**	3.7%
Accommodation and food service activities	**347,393**	4.7%
Information and communication	**84,494**	1.1%
Financial and insurance activities	**54,510**	0.7%
Real estate activities	**38,548**	0.5%
Professional, scientific and technical activities	**160,263**	2.2%
Administrative and support service activities	**218,136**	3.0%
Public administration and defence; compulsory social security	**55,732**	0.8%
Education	**92,388**	1.3%
Human health and social work activities	**206,588**	2.8%
Arts, entertainment and recreation	**21,820**	0.3%
Other service activities	**165,627**	2.3%
Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use	**969,859**	13.2%
Activities of extraterritorial organizations and bodies	**6,994**	0.1%
Total	**7,355,120**	100.0%

Source: GLMM (2018a).

Oil-importing developing countries

The group of oil-importing developing middle-income countries refers to Djibouti, Egypt, Jordan, Morocco and Tunisia. These countries have significant shares of their populations abroad and a history of work-related emigration. While significant proportions of the Maghreb countries' (Algeria, Morocco and Tunisia) populations are in Europe, the majority of emigrants from Mashreq countries (Egypt and Jordan) go to GCC countries (Table 3). Although Egypt has the lowest share of emigrants among the four countries mentioned above, it has the largest absolute number of emigrants, with the number one destination being Saudi Arabia (1.3 million in 2013), followed by the United Arab Emirates (0.7 million), Jordan (0.3 million), Kuwait (0.2 million) and the USA (0.2 million) (David and Nilsson, 2017). Second as a country of origin in both absolute and relative terms, Morocco has an approximate 0.9 million emigrants in France, followed by 0.7 million in Spain, 0.4 million in Italy and 0.2 million in the Netherlands.

Table 3. Emigration from oil-importing developing countries (2015)

	Egypt	Morocco	Tunisia	Jordan
International migrant stock	3,268,970	2,834,641	651,044	699,719
Developed regions	546,633	2,636,112	608,428	123,213
Developing regions	2,722,337	198,529	42,616	576,506
Emigration rate in total population	3.9%	8.3%	5.8%	9.1%

Source: David and Nilsson (2017), based on data from United Nations Department of Economic and Social Affairs.

France, Spain and Italy host significant numbers of Maghreb emigrants, and were hit hard in the pandemic's early stages, imposing early curfews and a complete lockdown of all but essential sectors. Emigrants in these countries can be classified into three groups: 1) employees or equivalent who kept their jobs and wages during the pandemic; 2) employees or equivalent who did not work during the pandemic, but who benefited from governmental technical unemployment compensation schemes; 3) workers without legal status who lost their jobs and saw no income compensation. For the last group, the pandemic plausibly corresponds to a near 100 percent income loss, at least for those workers who could not continue their activity, such as unregistered workers in the hotel and restaurant or construction sectors. For the second group, the pandemic should bring about a gross income loss of some 30 percent, the exact repercussions on net income depending on the initial wage and the country of residence (Foki, 2020). Unfortunately, no data are available on the proportions of Maghreb emigrants belonging to each of these categories.

To ascertain the impact of the twin shock on the amount of remittances sent, one might consider the procyclical and countercyclical nature of remittances. Generally, remittances are said to be procyclical with respect to the country of immigration (host country), and countercyclical with respect to the country of emigration (source country) (Frankel, 2011). This allows remittances to fill an insurance purpose in case of idiosyncratic shocks. The global pandemic and the drop in oil prices in 2020, however, negatively affected the economic environment in both origin and destination countries, such that an *a priori* opinion on the change in remittances is difficult to formulate. The available evidence from formal channels and estimations by the World Bank, however, shows that remittances fell in the second quarter (as shown by quarterly reports from MoneyGram and Western Union), and they were initially expected to continue falling throughout the year. It is now known that the total drop in remittances was much lower than expected, but country-specific losses may still be substantial. Thus, even if worsened economic situations in countries of origin cause migrants to want to transfer a larger share of their income to their origin households, this effect is dwarfed by the decrease in available income and the availability of channels to carry out such transfers.

Fragile/crisis-affected countries

The consequences associated with a drop in remittances may be particularly acute in the case of fragile countries or countries in crisis. This group includes countries at war, where basic services in areas of health care or education cannot be adequately met, and where social safety nets are non-existent or severely compromised. Some countries in the group rely little on remittances, such as Iraq and Sudan where remittances represent less than 2 percent of GDP (Figure 1). The apparent low reliance on remittances may be misleading though. In Sudan, for example, a recent UNDP report estimated total remittances (formal and informal) at 8 percent of GDP (Ramachandran et al., 2020). Although plausibly underestimated, World Bank remittances (compiled by the IMF based on data provided by central banks) still represent large shares of GDP in some countries, such as Lebanon—in a political, economic and societal crisis prior to the twin shock— State of Palestine and Yemen, caught in a civil war since 2014. For several countries in this group (Libya, Somalia and Syria), no recent reliable information on remittances exists. Country-specific studies on remittances, however, provide us with some indications of the importance of remittances. For Libya, although no estimates exist for the post-Gadhafi period, prior estimates from 2006 suggest that received remittances were close to zero (World Bank, 2019c). However, since the civil war, sizable Libyan diasporas have settled in Tunisia and Egypt, although little is known about potential transfers to Libya from these communities. For Somalia, although official figures are lacking, estimates indicate that the country may be the most dependent on remittances in the region. The most recent Article IV Staff report of the IMF (2019) places net remittances as a share of GDP at 29.2 percent, and a 2015 estimate of the World Bank (2016) mentions a figure of 23 percent. Lastly, in Syria, almost nothing is known about the magnitude of transfers since the onset of the Syrian civil war, although qualitative evidence from refugee camps and receivers in the country suggest that the phenomenon is widespread (Dean, 2015).

To summarize, in some countries in the fragile country group, such as Somalia, Yemen and plausibly Syria, remittances are an important lever to alleviate poverty and a channel of the utmost importance in analysing the effect of the twin shock on socio-economic equilibria. Fragile countries are countries where remittances likely compensate for basic needs not being met through other channels and are also those where the socio-economic consequences of a drop in remittances are the most dramatic. Findings from a study on 240 remittance-receiving households in Khartoum, Sudan (Ramachandran et al., 2020), suggest that households receive considerable amounts (82 percent of households receive monthly remittances in the range $200–900, which can be compared with the nationwide annual per capita GDP of $715). Therefore, remittances likely make a substantial difference for receiving households, who use around one third to fund health and education expenditure. The study also points out that 58 percent of the Sudanese diaspora send money for investment, primarily in real estate (52 percent) but also in productive enterprises in agriculture, industry and services. A slowdown of remittances would thus deprive the country of capital flows that spur development in all sectors.

Socio-economic impacts of remittances in the region

How are remittances used?

Unlike the latest estimates available, previous estimates suggest that remittances were expected to fall in 2020, although the extent to which they would was likely very heterogeneous across countries and households. Furthermore, the reliance on remittances to consume basic services might vary within countries, from one region to another, as it does between countries. The use of remittances is of central importance to a discussion on the consequences of these reductions. In the early economic literature, their use was considered unproductive, with recipient households claimed to be squandering resources on consumption goods with no long-term utility (e.g. Lipton, 1980). This traditionalist view has mostly been disproven by empirical data both internationally and from the region. An early paper by Adams Jr. (1991) suggests that a significant proportion of remittances to Egypt are used to invest in housing, a finding echoed by Zohry (2009). Arouri and Nguyen (2017) show that households which send a migrant to work increase their consumption of durable goods more than comparable households which do not send a migrant, and the finding of Adams Jr. (1991), that households with a migrant use a higher proportion of supplemental income on investment both confirm that emigration may be part of a long-term investment strategy, and not just a means of protecting the household against shocks. Similarly, in a study on an oasis in southwest Tunisia, Gammoudi and Sghaier (2007) suggest that remittances are mainly used to buy agricultural land and to hire agricultural labourers as substitutes for labour lost to migration (a similar phenomenon has been observed in Morocco). In Jordan, Chaaban and Mansour (2012) examine whether remittances affect the educational attainment of young men and women, showing a positive effect on schooling at the university level but not at the high school level, a result also found in Egypt by Elbadawy and Roushdy (2010).

Although remittances have been shown to increase investment and durable goods, this does not mean that they are not used to fill primary needs. Indeed, Akçay and Karasoy (2017) show a positive relationship between remittances and calorie consumption for Algeria from 1970–2008, which is only partially mediated by GDP, and, in a study using data from three Sudanese states, Suliman et al. (2014) show that remittances are mainly used to smooth consumption. A case study from Hargeisa in the self-declared autonomous region of Somaliland also suggests that in fragile settings, remittances are a means to cope and meet daily living expenses (Lindley, 2007). As previously mentioned, a commonly accepted framework is that remittances move countercyclically with the origin country's economic environment, acting as a cushion in terms of shock. This insurance function of remittances is far from universal though. Joseph et al. (2014) show that households living in areas of Yemen with unfavourable climatic conditions do not receive disproportionate amounts of remittances, and Sayan (2006) investigates the cyclicality of remittances in 12 countries from 1976 to 2002, three out of which are in the region. His results suggest that remittances were acyclical in Algeria, and procyclical in Morocco and Jordan, casting doubt on the pure insurance function of remittances for those economies.

Remittances and poverty and inequality

Related to the discussion about the use of remittances, a relatively large literature has attempted to answer the question of whether remittances decrease poverty and inequality in origin communities. For inequality, this hinges on the position of households in the income distribution. For poverty, it also hinges on the type of poverty considered—absolute, relative or multidimensional. For absolute poverty, there are few reasons to believe that an increase in remittances at the local level would plunge more households into absolute poverty, but if only relatively well-off households can afford to send a migrant, and subsequently receive remittances, this may accentuate inequality and relative poverty measures at the local level. In Egypt, Adams Jr. (1991) shows that including remittances in household income decreases the number of poor households by 9.8 percent, and other studies from the country generally suggest that migrant-sending households are better off than non-migrant sending households (Nassar 2005; Roushdy et al., 2009; Arouri and Nguyen 2017). In a cross-country study using 71 developing countries, Adams Jr. and Page (2005) show that for the MENA region, a 10 percent increase in remittances reduces the poverty headcount by 5.7 percent.

In Morocco, Teto (2001) finds that the removal of remittances would mean that 1.17 million Moroccans would fall back into poverty. Collyer (2004) and de Haas (2009), however, suggest that remittances also result in increasing intra-community inequality. In Tunisia, Gammoudi and Sghaier (2007) show that households with emigrants abroad enjoy higher standards of living, but also highlight potential negative externalities of remittances flow. One such negative externality is the impact on the real estate market, where remittances can make prices soar and exclude the poorest households from the market. At the same time, it has been argued that international migration and the remittances it generates may counter urbanization and agrarian decline in Morocco. While internal migration tends to generate urbanization, international migration may allow households to stay in their villages (De Mas, 1990; Fadloullah et al., 2000; de Haas, 2007).

An example of the not-so-straightforward relationship between remittances, poverty and inequality is the study by Margolis et al. (2013) from two migrant-sending regions of Algeria. While overall remittances help to decrease inequality and reduce poverty, it does so much less in one of the two regions (Nedrome). In this region, emigrants tend to send fewer remittances, thus compensating less for the negative effect of their absence in the household-on-household income.

Labour market effects of remittances

It is well known that non-work income affects individuals' behaviour in the labour market, and remittances should not be an exception to this. A vast literature has examined the links between migration, remittances and labour supply in origin households. Although it is not always the case, findings generally suggest that remittances have a labour displacement effect. On the one hand, the loss of a migrant produces a need for replacement labour. This may be especially true in agricultural households, where the amount of work on the farm is relatively constant. Sorensen (2004) discusses how, due to emigration, harvesting has gone from a traditionally male occupation to a female one in rural Morocco, to the point of it being shunned by men in some areas. A similar finding comes from anthropological literature on Egypt (Taylor, 1984; Adams, 1986). On the other hand, de Haas and van Rooij (2010), focusing on the Togda valley in Morocco, observe a decrease in the workload of women in international migrant households, since they can hire agricultural labourers (often women from internal migration or non-migrant households). Furthermore, Lenoël and David (2019) show that international migration lowers female labour market participation in the country and does not seem to be a lever for better employment for women.

The types of labour households engage in are also affected by remittances and migration. Binzel and Assaad (2011) show that wage labour decreases with migration in both urban and rural areas of Egypt, and Arouri and Nguyen (2017) show that migrant households more often engage in self-employment. The negative impact on wage employment further extends to child labour (Elbadawy and Roushdy, 2010), with migrant households seeing fewer children engaged in market work and an increased probability of school presence, in particular at university age.

In Jordan, studies point to a net labour decreasing effect of remittances (Emilsson, 2011; Wahba, 2014; Al-Assaf, 2016). Jordanian emigration is, however, relatively high-skilled, and Jordanians earn four times what they would earn at home (Wahba, 2014). This creates an upward pressure on reservation wages in Jordanian migrant households. In Tunisia, David and Marouani (2017) show that heads of remittance-receiving households participate less in the labour market.

The impact on labour market activities of remaining household members thus arises from two effects: a need to substitute for lost local labour, and a relaxation of the constraints on household income through remittances. It is evident that in the case of a large decrease or temporary halt in remittances, the only channel left is the need to substitute for lost local labour, suggesting increased labour market participation after a decline in remittances to the region. This is likely to affect those household members most likely to be inactive but on the margin of activity, such as spouses of migrants and relatively older children. The last point seems especially concerning, since temporary schooling interruptions have been known to translate into permanent school abandonment, and remittances contribute to educational investments in the region (Elbadawy and Roushdy, 2010; Mansour et al., 2011).

Macroeconomic effects of remittances

The preceding paragraphs have discussed remittances as a source of income at the household level. A large body of research has also looked into the macroeconomic effects of remittances, treating them as a financial flow affecting the balance of payments. As such, effects on growth (through increased or reallocated investment), inflation, the exchange rates or debt sustainability can be expected. One concern from remittances is that of a Dutch disease effect, namely that the inflow of remittances leads to an appreciation of the real exchange rate, lowering competitiveness and undercutting exports. Petri and Saadi-Sedik (2006) show that this has indeed been the case for Jordan, relying on a time series from 1964 to 2004. Fayad (2010) suggests that remittances generally appreciate exchange rates in the region, but that migration-induced foreign direct investment—increasing productivity and thus competitiveness—can attenuate the negative effect from remittances. Labour-exporting countries in the Arab region therefore may not suffer dramatic consequences from remittances, especially if financial markets are developed and deep, enabling remittances to be channelled into new investments. Similarly, the reverse Dutch disease effect prevailing for oil-producing labour importers implies that sent remittances put a downward pressure on the exchange rate, preserving competitiveness.

From a development perspective, a fundamental question to ask is whether remittances increase output. Glytsos (2005) argues that the relationship between remittances and output is country and time specific but finds a positive elasticity of remittances to output for Morocco, Jordan and Egypt. Saad (2015) finds a similar relationship for the West Bank and Gaza. This suggests that even if labour displacement effects from remittances exist and are important (such as in Jordan), their overall benefit for growth is ubiquitous and implies that the fall in remittances is a likely contributor to negative growth rates and development indicators in the wake of the twin shock.

Evidence from four countries in the region

This section introduces four short country studies using microdata to assess plausible repercussions of lockdowns and falling oil prices on remittances, and down the line, socio-economic indicators. The data used are either household-level origin country data (Tunisia, Somalia and Egypt) or individual-level destination country data (Algeria).

Plausible impacts of the twin shock in Tunisia

Migrants and remittances in the Tunisian Labor Market Panel Survey

The analysis is based on the Tunisian Labor Market Panel Survey from 2014 (Economic Research Forum, 2016),[36] a nationally representative survey of 4,521 households containing a total of 16,430 individuals. The survey contains a migration module where households can list up to five household members living abroad. Reported migrants are about 250, representing some 140,000 Tunisians living abroad: 72 percent reside in European countries, of which more than half live in France, while 11 percent live in Libya and 10 percent in other Arab countries. The typical migrant is a 35-year-old male, son of the head of household, who was unemployed prior to leaving.

Table 4 shows work-related characteristics of Tunisian migrants abroad. Based on household declarations, almost 7 out of 10 migrants are working. Within this group, the majority work in the private sector, where they evolve as wage workers, often in an irregular fashion. In terms of contractual arrangements, about one fifth of migrants do not have a contract, a little less than half of migrants have one (albeit more often than not of limited duration), and in remaining cases the household does not know the contractual arrangements of the migrant.

Table 4. Employment characteristics of Tunisian emigrants (2014)

Work status of migrant abroad.			Institutional sector of migrant abroad.		
	Freq.	%		Freq.	%
Working	96,073	69. 39	Government	5,024	5.40
Unemployed	21,111	15.25	Public enterprise	10,762	11.56
Inactive	14,134	10.21	Private	50,098	53.83
Don't know	7,130	5.15	NGO	677	0.73
Total	138,449	100	Associations	450	0.48
			Don't know	26,050	27.99
			Total	93,062	100
Employment status			**Contract duration**		
	Freq.	**%**		**Freq.**	**%**
Regular wage worker	55,089	59.84	Unlimited duration	18,527	19.71
Irregular wage worker	29,788	32.36	Limited duration	25,383	27.00
Employer	3,602	3.91	No contract	19,364	20.60
Self-employed not employing others	2,202	2.39	Don't know	30,733	32.69
Unpaid family worker	1,381	1.50			
Total	92,062	100	Total	94,007	100

Source: Tunisian Labor Market Panel Survey: migration module (Economic Research Forum, 2016). Weighted observations. Missing information implies that the row totals do not add up to the total number of working migrants.

Given the irregular nature of many migrants' work status, and the fact that according to origin households almost a quarter of migrants did not possess proper visa or travel documents upon departure, a fair share of migrants are likely to be undocumented.

36 The survey is a collaboration between the Tunisian National Institute of Statistics and the Economic Research Forum. See Assaad et al. (2016) for a description of the survey.

Table 5 suggests that around 3 percent of Tunisian households receive remittances from abroad. The cash or in-kind donations are mostly transferred via the donor himself or a friend, or through mail. Very rarely do individuals declare using money transfer operators. On average, a recipient household receives slightly less than 3,000 Tunisian dinars (about $1,050) per year in cash, and 363 Tunisian dinars ($127) in kind. These numbers can be compared with the average yearly wage declared by wage employed survey respondents in their primary job, some 6,300 Tunisian dinars.

Table 5. Remittances in Tunisian households

Is the household receiving remittances from abroad?			Amount received in Tunisian dinars	In cash	In kind
	Freq.	**%**		**%**	**%**
No	2,649,842	97.27	None	15.22	47.3
Yes	73,960	2.73	Less than 1,000	33	21.79
Total	2,729,782	100	1,000–1,999	10.99	1.96
			2,000–3,999	12.35	1.24
How did the donor send money?			4,000–9,999	3.21	2.42
	Freq.	**%**	10,000 and above	2.64	0
By himself	10,476	13.11	Don't know	22.59	25.28
Friend/relative	18,592	23.26	Total	100	100
Mail	43,729	54.7			
Bank	4,104	5.13			
Money transfer office	2,023	2.53			
Other	677	0.85			
Missing	338	0.42			
Total	79,940	100			

Source: Tunisian Labor Market Panel Survey: migration module (Economic Research Forum, 2016). Author's calculations. Weighted observations. One household may receive from several donors, such that the number of transmission channels adds up to more than the number of households receiving remittances.

Effects of a drop in remittances to Tunisian households

The above data suggests that on average, a Tunisian household in receipt of remittances receives about half of a year's worth of salary. This is by all means an important addition to household resources on average, and raises three further questions: 1) where in the income distribution are remittance receiving households located? 2) are households that are seeing income from remittances drop also likely to see their domestically earned income drop? 3) how do households alter spending patterns to deal with the income shock?

Table 6. Household characteristics by remittance receiving status

	Receives remittances		
	No	**Yes**	**Difference**
Household size	3.60	3.37	12
No. Of children	0.87	0.80	0.06
Employed members	0.86	0.82	0.04
Age of household head	55.4	57.9	-2.5*
Mean income	439.9	1,008.8	-568.9
Median income	401.67	480.00	78.3
Income from non-agricultural business	0.5	0.07	-0.02
Receives agricultural income	0.11	0.15	-0.04*
Percentile of income distribution	50	50	0
Decile of wealth score	5th	6th	1***

Source: Tunisian Labor Market Panel Survey 2014 (Economic Research Forum, 2016). Author's calculations. Unweighted observations. Student's t-test P-values: *** <0.01; ** <0.05; * <0.1

Although no reliable survey data on the variation in remittances to Tunisia in the present period is available, available data from the Tunisian Labor Market Panel Survey can at least provide information on the relative situation of household remittances in the country in 2014. Table 6 shows that households receiving remittances are overall quite similar to households that do not receive remittances, in terms of size, employed members and age. They are, however, slightly wealthier on average, but the lion's share of the difference is due to a few high-earning households, with a median income much closer to that of non-remittance receiving households, and the difference in income is not significant. Excluding remittances, their location in the household income distribution is similar for recipient and non-recipient households (although when observations are weighted, recipient households are slightly better off). When remittances are included (not shown), recipient households are in the 62nd percentile and earn an average 1,510.3 Tunisian dinars per month (and a median 517 DT). In terms of assets, remittance-receiving households are also wealthier; on average belonging to the sixth decile of a synthetic wealth score taking into account some 30 household durable goods, while non-recipient households on average belong to the fifth decile.

Table 6 also suggests that households receiving remittances more often receive income from household enterprises, be they agricultural or non-agricultural. These results arise from bivariate tests, implying that variables may have no genuine influence on remittance receipt, but simply reflect correlations with another, omitted variable. To assess the extent of such multicollinearity, an ordinary least squares and a probit regression were run. The variables for which differences were significant in Table 6 also have significant coefficients in those regressions, while variables showing no significant difference between recipient and non-recipient households turn up non-significant. To properly assess the causal nature of links between remittance receipt and income, however, endogeneity of remittance receipt should be dealt with. It is very likely that households receiving remittances are different from households not receiving remittances in other dimensions than remittance receipt, making their use as a control group questionable. Instrumental variables are often used to alleviate such concerns, but rely on strong and untestable assumptions of unconfoundedness, and may when unsuitable lead to even more bias. In this study, and for all four countries, no credible instrument for remittance receipt was found, and bivariate correlations should thus not be interpreted as more than what they are: correlations.

If migrants' employment status and vulnerability to the twin shock were completely random with respect to household income, we could expect the shock to be inequality-reducing, with relatively wealthy households losing more than relatively poor ones. The extent to which such inequality reduction actually takes place depends on the evolution of remittance-receiving households' domestically earned income during the COVID-19 pandemic. A phone survey carried out by Tunisia's National Institute of Statistics (2020a, 2020b) in collaboration with the World Bank—which took place in two waves in April and May 2020—sheds some light on how households adapted to the pandemic, and the kind of households most affected financially by the crisis. The report shows that in the midst of the lockdown, two thirds of individuals employed before lockdown were away from work during lockdown, the vast majority of whom declared COVID-19 as a direct or indirect reason. The survey also provides some information on wage losses, which turn out to be unequal across sectors and along the income distribution. As such, more than half (53.3 percent) of the poorest 20 percent of wage earners declared receiving no income, against 15.6 percent of the richest 20 percent. Furthermore, the share of wage earners receiving pay while away from work varies greatly by sector. While most agricultural and industry workers perceive at least part of their wages (72.6 percent and 61.3 percent respectively), only 27.1 percent of wage earners in the service sector do so. A joint report by UNDP and the Tunisian Ministry of Development, Investment and International Cooperation (2020) on Tunisia, based on a Computable General Equilibrium model of the Tunisian economy, furthermore suggest that in terms of employment loss, service sectors (tourism and transport, mainly) as well as non-manufacturing industry were hit the hardest.

Table 6 showed that households receiving remittances were slightly wealthier than non-remittance receiving households. Plausibly, and according to the results of the phone survey run by the Tunisian Statistical Institute in association with the World Bank, they would also be slightly more protected against wage losses. However, if households receiving remittances were systematically more present in the service sector than non-remittance receivers, this effect could be counterbalanced. A look at the data, however, shows that while some 66 percent of employed individuals in the country are wage earners, members of remittance-receiving households are neither more often wage earners, nor more often in the service sector than members of non-recipient households.

In Tunisia, two thirds of households receiving remittances are headed by men. This confirms that migration occurs in a different way in Tunisia from other countries in the region, such as Egypt, where emigration is job-related, temporary and very male-dominated (almost 4 out of 5 remittance-receiving households in Egypt are headed by women). When women do head remittance-receiving households, they are often housewives or elderly and outside the labour force. Those who do work declare being self-employed or unpaid family workers.

The results above suggest that Tunisian households receiving remittances are on average slightly better off than non-recipients and are no more vulnerable to domestic income losses. A flat decrease in remittances, although definitely income-reducing and plausibly poverty-increasing, is likely to result in a more equal disposable income distribution.

Plausible impacts of the twin shock in Egypt

Migrants and remittances in the Egyptian Labor Market Panel Survey

The Egyptian Labor Market Panel Survey has been running since 1988, and the fifth wave, with data collected during 2018, provides the basis for the analysis of the Egyptian case (Economic Research Forum, 2019). Unlike Tunisia, which is also a member of the group of oil-importing middle-income countries, a majority of Egyptian migrants are engaged in temporary migration to other Arab states, primarily those of the GCC. The 2018 wave of the survey contains data from 15,746 households, and reported migrants in the migration module are 815, representing some 1.1 million Egyptians above the age of 15 and living abroad.[37] Of those migrants, 93 percent reside in Arab countries, the most common being Saudi Arabia (41 percent), Kuwait (24 percent) and Jordan (11 percent). The typical migrant captured in the survey is a 37-year-old male who is married, attended secondary school and had a job as an irregular wage worker in the private sector prior to migration.

Table 7 shows job-related characteristics of Egyptian migrants, and confirms the purely job-oriented, temporary migration of Egyptian migrants. A very large majority (94 percent) of migrants are employed, and virtually all are wage workers, although one third of migrants work as irregular wage workers. The vast majority belong to the private sector and make an average 34,000 Egyptian pounds a month ($2,160 or roughly 17 times the national minimum wage). Finally, the fact that 31 percent have no formal job contract, and 45 percent a limited duration contract, bears witness to a precarious employment situation, suggesting a strong vulnerability of migrants to fluctuations in the economic and policy environments of host countries. The destination countries of migrants—primarily other Arab oil-producing countries—further strengthens this vulnerability in the present context. Falling oil prices conjugated with the global pandemic and labour nationalization policies suggest that many migrants are likely to see their job prospects worsen. Indeed, evacuations of Egyptian workers have taken place in Saudi Arabia, Kuwait and Qatar, and the strict lockdown measures taken in Jordan have most likely caused substantial numbers of Egyptian workers to return home (Centre for Migration and Refugee Studies, 2020b).

37 This is not an estimate of the Egyptian diaspora, which is much larger. It only refers to Egyptians considered to be part of a household residing in Egypt (the criterion is having lived in the household six months prior to migration). Migrants whose entire households have moved are therefore excluded from such estimates.

Table 7. Employment characteristics of Egyptian emigrants

Work status of migrant abroad			Institutional sector of migrant abroad		
	Freq.	**%**		**Freq.**	**%**
Employed	1,021,152	93.73	Government	40,239	3.95
Unemployed	31,283	2.87	Public enterprise	621	0.06
Inactive	17,745	1.63	Private sector	879,670	86.29
Don't know	19,225	1.76	Investment	22,745	2.23
Total	1,089,405	100.00	Foreign	10,720	1.05
			Non-profit/NGO	525	0.05
Employment status			Don't know	64,947	6.37
	Freq.	**%**	**Total**	1,019,468	100.00
Regular wage worker	619,033	60.72			
Irregular wage worker	377,099	36.99	**Contract duration**		
Employer	2,351	0.23		Freq.	[%]
Self-employed	12,689	1.24	Unlimited duration	152,984	15.37
Unpaid family worker	1,406	0.14	Limited duration	455,116	45.72
Don't know	6,890	0.68	No contract	307,232	30.86
Total	1,019,468	100.00	Don't know	80,155	8.05
			Total	995,487	100.00

Source: Author's calculations using the 2018 wave of the Egyptian Labor Market Panel Survey (Economic Research Forum, 2019). Due to missing variables for some observations, totals for employment status and institutional sector do not add up to the total number of employed migrants.

Regarding remittances, some 3.5 percent of Egyptian households receive remittances from abroad (Table 8). This number excludes households receiving payments from within Egypt, through internal migrants for example. Including all remittances irrespective of their origin, the share of Egyptian households receiving remittances stands at 5.8 percent. Contrary to the Tunisian case, a majority of remittances in Egypt arrive through bank transfers. The extent to which such transfers are carried out using digital tools in unknown but is likely to determine the percentage of income that migrants were able to transfer during lockdown. With regards to facilitating the use of digital bank services, in March 2020 Saudi Arabia's Central Bank urged commercial banks to waive all fees associated with digital services, including subscription fees for new customers (Bloomberg, 2020).

Table 8. Remittances in Egyptian households

Is the household receiving remittances from abroad?			Amount received in Egyptian pounds		
	Freq.	**%**		**% in cash**	**% in kind**
No	22,301,133	96.55	Less than 1,000	7.97	54.97
Yes	795,796	3.45	1,000–3,999	29.91	12.15
Total	23, 096,929	100.00	4,000–9,999	12.65	15.02
			10,000–19,999	17.39	2.38
How did the donor send money?			20,000–49,999	16.32	0.65
	Freq.	**%**	More than 50,000	6.22	1.68
In person	89,710	10.83	Don't know	9.55	13.14
Friend/relative	103,935	12.55			
Mail	95,732	11.56	**Total**	100.00	100
Bank	518,271	62.59			
Money transfer office	18,636	2.25			
Don't know	1,746	0.21			
Total	828,030	100.00			

Source: Author's calculations using the 2018 wave of the Egyptian Labor Market Panel Survey (Economic Research Forum, 2019).

In terms of amounts received, the median household received 4,000 Egyptian pounds in the 12 months preceding the interview, a sum equal to twice the minimum wage. The distribution of amounts is wide, however, and there are relatively many households receiving much lower as well as much higher amounts.

Effects of a drop in remittances to Egyptian households

Table 9 shows differences between Egyptian remittance receiving households and non-remittance receiving households. Compared to the equivalent table for Tunisia (Table 6), Egyptian migrant-sending households are statistically different from non-sending households to a larger extent. This emphasizes different migration practices among the two countries: in Egypt, it is often the main breadwinner who migrates, substantially reducing the average number of employed persons in the household. Furthermore, while income excluding remittances in Tunisian households was similar for both household groups, Egyptian migrant-sending households have significantly lower pre-transfer incomes, confirming that the loss of the main breadwinner needs to be compensated through remittances, and also suggests that Egyptian emigration is more work-oriented than Tunisian emigration. Ultimately, Egyptian households that receive remittances are thus more vulnerable to fluctuations in destination country incomes than their Tunisian counterparts.

Table 9. Characteristics of Egyptian households by remittance receipt

Is the household receiving remittances from abroad?	No	Yes	Difference
Household Size	3.90	3.51	-0.40***
Number of children	1.37	1.59	0.22***
Number of employed	1.07	0.45	-0.6163988***
Head of household's age	46.3	39.7	-6.61363***
Income (including remittances)	3,702	3,785	83
Income (excluding remittances)	3,702	2,616	-1086*
Income from non-agricultural business	0.13	0.06	-0.066***
Income from agricultural business	0.12	0.14	0.016
Median income	1,790	1,435	-355
Wealth decile	6th	7th	1***
Income percentile (excluding remittances)	51st	30th	-21***
Income percentile (including remittances)	51st	48th	-3**

Source: Egyptian Labor Market Panel Survey, 2018 (Economic Research Forum, 2019). Author's calculations. Unweighted observations. Student's t-test P-values: *** <0.01; **<0.05; *<0.1.

Given that households with migrants are on average approximately as wealthy (or as poor) as households without, and the fact that remittances account for a sizable share of their income, a sudden, drastic loss of income (such as one associated with a halt to remittances) would put them at risk of poverty. Abstracting from remittances would indeed shift these households from the middle of the income distribution to the third decile. Furthermore, most remittance-receiving households (77 percent) are headed by women, whose incomes tend to be lower and contractual arrangements more precarious than those of men (Constant et al., 2020). In addition to their vulnerability to fluctuations in remittances, this group of households may also be more vulnerable on the local labour market. Schooling interruptions may also require women to stay at home taking care of children, reducing the time spent in market work even when such work would be available. Indeed, Egyptian women heading households that receive remittances tend to declare themselves as housewives, and it is therefore plausible that they are not part of the labour market. Only some 11 percent of these women work, the vast majority of whom work in agriculture, and they have on average one additional child living in the household, implying more severe constraints to labour market participation.

Plausible impacts of the twin shock in Somalia

Perhaps no country in the list fits the description of a fragile country as well as Somalia. After more than 25 years of civil wars, and a failure of numerous governments to establish order of law and provide basic services, a sizable Somali diaspora exists, which sends money back to their home country. Concentrated in neighbouring countries (Ethiopia, Kenya and Yemen), large diasporas also exist in the United States and in several European countries. This section focuses on the plausible impacts on Somalian households' livelihoods through a decrease in remittances. As if the global downturn due to oil prices and COVID-19 were not enough, the country has been hit by two other exogenous shocks threatening livelihoods: the worst locust outbreak in

25 years and serious seasonal flooding that has displaced some 0.5 million people. In a country where one fourth of GDP is composed of remittances, essential to maintain livelihoods in the face of such shocks, the timing could not be worse.

Migrants and remittances in the Somali High Frequency Survey

The data used in this analysis comes from the Somali High Frequency Survey (SHFS), a collaboration between the World Bank and the Somali Statistical authorities (Pape, 2017) which features a sample of 6,092 households across 17 regions of Somalia, including nomadic households and households in internally displaced persons settlements. The dataset distinguishes internal and international remittances, received by some 7.4 percent and 10.9 percent of households respectively. In this section, coherent with the commonly accepted definition of remittances, we focus on international remittances and exclude within-country transfers from the analysis. It should, however, be recalled that internal remittances may well be transfers of international remittances from urban households to their rural relatives (Majid et al., 2020). The data used, however, does not allow us to identify the source of internal remittances, but the overall percentage of households that declare receiving remittances and/or internal transfers stands at 15.7 percent.

In the survey, almost all (99 percent) of declared remittances come from family members, most often from a brother or sister (42.5 percent), or a niece or nephew (17 percent). Remittances are sent in US dollars, and most often on a monthly basis (67 percent of households declare receiving remittances once per month). Of the households surveyed, 6.5 percent declare remittances to be their main source of income/livelihood.[38]

Table 10. Amount and receipt of remittances, last 12 months (Somalia, 2017)

How are remittances received?	Households	%
At a remittance company like Dahabshiil (*hawala*)	181,214	86.5
Other	26,055	12.4
At a bank	18,422	8.8
In the mail	1,131	0.5
By a bus or minibus	979	0.5
Through a credit card or automatic teller machine card	967	0.5
Through a family member travelling to your area	967	0.5
Through the internet	384	0.2
Through a mobile phone	204	0.1
By a courier	136	0.1
Amount received (12 months)	**Households**	**%**
Less than $100	14,789	7.3
$100–249	52,365	25.9
$250–499	34,912	17.3
$500–999	40,469	20.0
$1,000–2,999	49,115	24.3
$3,000–9,999	8,450	4.2
$10,000 or more	2,225	1.1

Source: Author's calculations using Wave 2 of the SHFS (Pape, 2017).

Table 10 shows a breakdown of channels and number of remittances for remittance-receiving households in Somalia. By all accounts, remittances are overwhelmingly channelled through remittance companies, among which the Dahabshiil money transfer company is the dominating actor in Somalia. The system is a modernized form of *hawala*, fully integrated with mobile and bank services. The average amount received in the last 12 months stands

38 The first round of the SHFS, fielded in 2016, suggested that 26.4 percent of households relied on remittances as their main source of income. The second round, however, has multiplied the number of categories and introduced the word livelihood rather than pure income. In the second wave, some 24 percent of households now declare agriculture to be their main source of livelihood—a previously non-existent category.

at $944, with a median of $450. Although a very uncertain estimate, the IMF puts the Somalian GDP per capita in 2017 at $327, confirming the importance remittances play in Somalian households' livelihoods (IMF, 2019).

Table 11. Somalian diaspora and origin of remittances

Somalian diaspora (Individuals, 2015 (United Nations, 2015))		Top remittance origins (Households, 2017, SHFS)	
Kenya	**488,470**	**United States**	**41,065**
Ethiopia	442,910	United Kingdom	35,556
Yemen	**245,683**	**Saudi Arabia**	**30,396**
United States of America	145,579	Canada	24,003
United Kingdom of Great Britain and Northern Ireland	**110,775**	**Sweden**	**22,645**
Libya	104,539	South Africa	15,925
Djibouti	**93,042**	**United Arab Emirates**	**14,028**
South Africa	69,688	Other	7,958
Sweden	**59,213**	**Netherlands**	**5,238**
Uganda	28,586	Kenya	4,412
Netherlands	**27,115**	**Somalia**	**3,569**
Norway	27,042	Sudan	1,735
Canada	**24,747**	**Djibouti**	**829**
Egypt	22,709	Yemen	761
Algeria	**20,810**	**Ethiopia**	**46**
Finland	12,490	Eritrea	32

Source: Figures on the Somali diaspora come from United Nations (2015) and represent estimated numbers of individuals in each host country. Numbers on remittance origins are weighted observations from the SHFS and represent the main source country of international remittances of the household.

Table 11 shows the locations of the Somali diaspora, and the main origins of remittances as declared by households in the SHFS. As previously stated, the largest numbers of Somalis abroad are to be found in the neighbouring countries of Ethiopia, Kenya and Yemen (although there are reports of significant flows of returnees from Yemen since the start of the civil war in 2014). Remittances, however, mostly accrue from North America, Europe and the Gulf (and to a lesser extent, South Africa). In terms of amounts remitted, Somalis in the UK remit the largest amounts, followed by those in Sweden and the United States. Given the predominance of Europe and North America as sources of income, understanding the plausible drop in remittances to Somalia requires understanding the income situation of the Somali diaspora in those countries.

The SHFS does not directly ask questions about the labour market situation of Somali relatives abroad. Secondary sources, however, suggest remitting is commonplace: out of 106 interviewees of Somalis in the UK, 100 percent declared sending money to Somalia on a regular basis, and most of them send to more than one person (Hassan and Chalmers, 2008). The study also mentions that only 16 percent of the Somali-born population in London is officially employed, the lowest of any foreign-born community. A study from Sweden also suggests Somali employment to be particularly low—at 21 percent, compared to 73 percent in the entire population. While the Somali diaspora in North America is also less employed than the population average, the gap is strikingly smaller, with 46 percent and 54 percent of Somalis employed in Canada and the United States respectively. Even in these countries, however, reports suggest that Somalis have the lowest employment rates and the lowest median income of all foreign-born ethnic groups (Capps et al., 2012). While this is undoubtedly a bad thing in terms of integration and welfare in the host country, it could also imply that many Somalis receive their income from other sources than the labour market. Social transfers are one such source, the volatility of which is lower than the volatility of wages during times of crisis such as the COVID-19 pandemic. Given the low labour market insertion of the Somali diaspora, the drop in remittances could arguably be estimated as lower than for other countries in the region.

Effects of a drop in remittances to Somali households

What are the characteristics of remittance-receiving households in Somalia? Table 12 shows a set of household characteristics for remittance-receiving and other households in Somalia. Similar to Tunisia, albeit more distinctively so, remittance-receiving households seem better off in almost all dimensions. Columns 2 and 3 show households receiving international remittances (with Column 2 containing households also receiving internal transfers). Households belonging to these categories are less often below the poverty line. When they are poor, they are on average closer to the poverty line than households which do not receive remittances. Both food and non-food consumption are higher for households with remittances. Interestingly, these differences are prominent for households receiving international remittances only. Internal transfers do not seem to protect against poverty, be it food or non-food.

Table 12. Remittances and household characteristics (Somalia, 2017)

	No remittances	International & internal remittances	International remittances only	Internal remittances only
Poverty and consumption				
Below poverty line (%)	64	55	49	66
Average poverty gap of poor households	0.40	0.24	0.36	0.35
Below food poverty line (%)	44	22	33	43
Weekly non-food consumption (PPP 2017 $)	32.96	39.28	34.79	34.72
Weekly food consumption (PPP 2017 $)	12.12	19.26	15.97	13.21
Household situation				
Household size	5.36	5.34	5.43	5.53
Urban (%)	63	76	81	69
Internally displaced (%)	16	3	8	10
Nomad (%)	26	11	13	41
Amenities (%)				
Household head literate	49	77	60	46
Water at home	39	78	65	30
Electricity	48	87	76	55
Agriculture main livelihood	25	2	10	28
Receives social assistance	25	29	14	31

Source: SHFS (Pape, 2017), author's calculations.

Abbreviations: PPP, purchasing power parities.

Households seem to be relatively equal in size. Remittance-receiving households, however, more often live in urban areas. This could be a wealth effect, but could also be related to the wider availability of remittance operators in urban areas. Remittance-receiving households are also less often nomadic, and less often internally displaced than non-recipients. In terms of standard of living, they are more often equipped with water and electricity in their homes, and household heads are more often literate. Surprisingly, households receiving only international remittances receive less social assistance, whereas the same is not true for households receiving both internal and international remittances.

An interesting question is whether these effects are location driven. It could be that wealthier areas of Somalia also feature higher rates of remittance receipt, and that in a given area, there is no correlation between household wealth and remittance receipt. Producing the figures in Table 12 for urban households only does not alter the main findings. For all of the above indicators, remittance-receiving households in urban areas are better off than non-recipient households. Furthermore, when regressing the above indicators on remittance status and adding a set of regional controls, we find that the relationships hold.

Even if households receiving remittances in Somalia are relatively well-off with respect to their non-recipient counterparts, this does not imply that a drop in remittances will not be a significant shock to family incomes. As previously stated, the median remittance-receiving household receives $450 per year, or $37.5 per month. This is roughly equivalent to half of what they spend on food during a given month, and a flat drop in household income equivalent to that amount would place a significant number of non-poor households on the other side of the poverty line and reinforce the severity of poverty of the already poor. It should be noted though, that such an exercise ignores at least two things: 1) that the organization and labour market participation of the household is resulting from the fact that it receives remittances, and 2) that the receipt of remittances does not fall randomly on households. In other words, receiving remittances is most likely endogenous to a large set of household characteristics, including income generating activities. The World Bank Somali Poverty and Vulnerability Assessment (World Bank, 2019e) computes counterfactual poverty and income figures for Somalia without internal and international remittances. Their figures suggest a moderate effect of remittances, the absence of which would increase the poverty headcount by 2 percentage points and increase the Gini coefficient by 0.01. These figures are most likely lower than the real impact in the short term. In reality, for households to change their economic organization may take time, and in the initial period following a shock, households are likely to see significant decreases in their income levels before being able to strategically adapt. As is well-known from a vast literature on income shocks in developing countries, plausible mitigation strategies include selling assets (productive or unproductive), taking loans and taking children out of school.[39] Furthermore, lack of sufficient nutrition during early childhood comes with lifelong costs in terms of stunting, which translate into decreased earnings in adulthood (Almond and Currie, 2011).

Plausible impacts of the twin shock in Algeria

Migration and remittances in two French datasets

Unfortunately, there are no publicly available datasets mentioning remittances for the group of oil-exporting countries, including Algeria. Nevertheless, two French datasets can be mobilized to assess the extent to which remittances are likely to be affected by the twin shock. Evidently, not all Algerian emigrants reside in France, but a large proportion does, such that lessons learned from immigrants in France go a long way in understanding how remittances may affect recipient households in Algeria in general. According to United Nations Department of Economic and Social Affairs data, 81 percent of all Algerian migrants live in France (United Nations, 2015).

The first dataset originates in a study on diasporas and remittances in the city of Montreuil, a suburb of Paris (Chauvet et al., 2015). The survey sample comprised 156 Algerian migrants sending remittances, who were questioned on their employment and income, remittance behaviour, and general financial inclusion. The second dataset—Trajectories and Origins—comes from the Institut National d'Etudes Démographiques and contains 958 individuals born in Algeria aged 18–60 years, representative of some 740,000 Algerians living in France in 2009 (Beauchemin et al., 2010).[40] The information in this dataset corroborates the idea of a relatively weak stream of remittances from France to Algeria. Only 7 percent of Algerians state that they send financial aid outside of France.

Table 13. Characteristics of remitting and non-remitting Algerians in France, (Trajectories and Origins, 2009)

	Not sending remittances	Sending remittances	Total
Employment status	%	%	%
White collar worker	8.1	6.7	8.0
Blue collar worker	18.8	29.2	19.6
Other worker	33.9	45.0	34.7
Not working	39.3	19.1	37.8
Currently employed	%	%	%
Employees, public sector	27.6	11.8	26.1
Employees, private sector	67.6	80.1	68.8
Help in family business without pay	0.3	0.0	0.2
Business owner/own-account worker	4.6	8.1	4.9
Income			
Per capita household income (euros, monthly)	1,047	983	1,042
Average earnings in main job	1,654	1,638	1,653

39 Schools have been closed in Somalia during various stages of the pandemic, but when they have reopened, some vulnerable families may have not had the means to re-enrol their children.

40 When counting the total diaspora, children and the elderly should be included. Furthermore, many French-born descendants of Algerian immigrants hold dual citizenship; therefore, the current number of Algerian citizens in France is closer to 2 million.

	Not sending remittances	Sending remittances	Total
Other characteristics	%	%	%
Finished high school	38.4	43.6	38.8
University diploma	25.4	30.8	25.8
French citizenship	65.8	40.2	63.9

Source: Author's calculations using data from the 2009 Trajectories and Origins dataset (Beauchemin et al. 2010).

Table 13 suggests that remitters are not radically different from non-remitters. They are, however, more often employed, although less often in white collar jobs, and more often in the private sector. Their income is slightly lower than that of non-remitters, but the difference is not substantial. Furthermore, they are more likely to have finished high school and gone to university, but less likely to hold French citizenship.

Using data from the Greenback 2.0 survey (Chauvet et al., 2015), Table 14 shows the number of yearly remittances sent by Algerian migrants. Similar to Tunisia, formal channels such as money transfer operators are seldom used, and some 91 percent prefer to use hand-to-hand remittances (either through friends, the *hawala* system or in person when visiting) rather than wire transfers or money transfer operators. Average yearly remittances stand at €1,260 but include a few very large remitters. Median yearly remittances stand at €500. This can be compared to the official minimum wage, recently raised to 20,000 Algerian dinars, equivalent to €137 per month at the official exchange rate.[41] On average, Algerian remitters have been in the country quite a long time (the median stay is 13 years, and the average duration of stay is 16 years).

Table 14. Remittances to Algeria from a Parisian suburb (2014)

Amount remitted over last 12 months			Use of remittances	
		%		%
Less than €500	65	41.67	Food	50
€500–999	29	18.59	Others	47
€1,000–2,999	30	19.23	Durable/technological goods	39
€3,000–9,999	14	8.97	Health	37
€10,000 or more	7	4.49	Emergencies (disease, accidents, natural disasters)	31
Don't know or won't say	11	7.05	Productive investment or real estate	22
Total	156	100	Education	11
			Debts	5
Beneficiary of remittances			Rent	3
		%	Savings	2
Parents	67	44.08	Did not cite any use	6
Siblings	40	26.32		
Spouse or children	6	3.95		
Other family	21	13.82		
Friends	7	4.61		
Other	11	7.24		
Total	152	100		

Source: Greenback 2.0 survey, carried out in Montreuil and surrounding areas in 2014 (Chauvet et al., 2015).

Table 14 also shows that the main beneficiaries of remittances are parents, followed by siblings. Given that the average age of remitters is 39 years, parents are presumably near or at retirement, and remittances are a means of preserving a certain quality of life in the absence of income from work. The declared uses of remittances fit

41 And significantly less at the black market rate.

this picture well, with the most prevalent use being food consumption. When cross-tabulating beneficiaries and remittance uses, parents are indeed overrepresented among individuals using remittances for food, health or emergencies.

What are the plausible vulnerabilities of remittance streams to Algeria in times of pandemic? The above paragraph showed that a large majority of remittance senders used hand-to-hand transactions. Of the remitters interviewed, 62 percent state that they return to Algeria at least once a year, and an additional 21 percent return at least every two or three years. Most large cities in France have direct airlines to major Algerian cities, and Algerians are allowed to bring €7,500 in cash through customs (Algeria, General Directorate of Customs, 2020). In a situation where most remitters declare holding formal jobs, thus receiving at least 80 percent of their initial wage, perhaps the largest threat to remittances during the recent period was the closure of the Algerian borders after mid-March 2020 (France 24, 2020). Although this opened up for the possibility of growth for alternate channels of transfers, such as money transfer services, many, if not most, may have preferred delaying remittances until borders reopen, unwilling to pay commission fees they were not accustomed to.

Effects of a drop in remittances to Algerian households

Since no direct household data featuring information on remittance receipt is publicly available, it is difficult to make predictions about the plausible impact of a drop in remittances to Algerian households. Margolis et al. (2013) do not find any effect of remittances on inequality as measured by the Gini coefficient. They do, however, find an effect on poverty, with migration accounting for a drop in poverty of 16 percentage points, and highlight an important effect of foreign pensions from returnees who spent a large share of their working life in France. As previously stated, both a drop in income and delayed remittance due to closed borders were likely to have affected remittance flows to Algeria, and assuming the results of Margolis et al. (2013) hold, increased household poverty is a likely outcome, especially in vulnerable communities.

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V. Policy recommendations

Many countries, both host and source countries, have implemented policies to try to curb the worst adverse effects of the global downturn, especially in terms of employment and incomes. European governments in Spain, Italy and France, which host large North African diasporas, have backed technical unemployment programmes, providing temporarily unemployed workers with a significant share of their previous income (60 to 84 percent). The durations of such furlough programmes, however, have varied, as has the share of furloughed employees in the workforce. Furthermore, the extent to which government budgets have been able to sustain such programmes has depended on the evolution of the pandemic and the extent to which economies have recovered positive growth rates.

GCC countries have also passed laws attempting to deal with the effects of the pandemic. In some countries, the virus has allowed for increased attention on the living and working conditions of migrants, who have accounted for a large proportion of infections in GCC countries. Prominent policy responses have included access to health care and testing facilities, and a tolerance for overstaying work permits. In Jordan, a cash transfer programme was rapidly expanded to support Syrian refugees during the crisis (however, other migrant workers were not covered). In Kuwait, a six-month moratorium on bank loans for both citizens and migrant workers retail clients was enacted, and price stability and minimum income programmes were voted upon. In the United Arab Emirates, governments have outlawed evictions for tenants unable to pay their rents and have decreased fees on a number of business-related expenses. Furthermore, in the United Arab Emirates and in Saudi Arabia, labour law has been amended to enable employers to decrease workers' wages, impose vacation or reduce working hours. While these actions may keep some businesses afloat during the pandemic, they may also carry long-term negative effects for migrant workers. In GCC countries, governments may find the present period opportune to pursue labour nationalization policies. Such policies may impact skilled migrants in the long term if they are successfully replaced by nationals.

This section provides a set of short- and medium- to long-term policy recommendations to accelerate efforts to respond to the challenges faced by migrants and their families in the region. The section also includes a focused set of policy recommendations to alleviate remittance-related challenges.

Short term

- Ensure access to (and affordability of) quality health care, COVID-19 testing and treatment, and access to vaccinations for all migrant populations in host countries, and particularly the most vulnerable; remove any perceived fears of punitive measures. Efforts should also be undertaken to ensure that care-rationing choices are not made based on socio-economic and/or migration status.

- Consider extending temporary unemployment compensation to migrant workers; providing rent control and subsidies on essential goods and services to preserve income/savings; and extending visas and support for employment retention, so migrants can return to work. Guarantees of protection against income losses, such as unemployment insurance, could be extended to foreign workers in countries that grant such protection to nationals. Access to unemployment insurance could also be guaranteed to returning migrants in their countries of origin. Countries that do not offer generalized social security systems including unemployment insurances schemes, such as Lebanon (Abou Jaoude, 2015, p. 15), could pursue these. The portability of social security rights and retirement insurance subscribed to in host states could also be guaranteed to workers willing to return to their country of origin after retirement.

- Consider addressing protection gaps, including protective measures against COVID-19, which affects the most vulnerable among migrant workers (low-skilled labourers in housing compounds, live-in domestic labourers and informal sector labourers).

- Labour inspections by host state governmental authorities could be expanded to cover inadequate housing conditions (in the case of labourers living in employer-provided accommodation); and non-compliance with the contract provisions, working conditions, and workers' health protection. Labour inspection teams could include representatives from migrants' countries of origin and NGOs involved in defending migrant rights.

- Enhance the roles of local government and civil society by providing technical and financial support to municipalities and local authorities to ensure effective service delivery to migrants.

- Consider providing affordable, safe and COVID-19 compliant transport options for migrants who plan to return to their country of origin, through greater collaboration between host and sending countries.

- Scale up reintegration programmes in line with the corresponding need of returning migrant populations in their countries of origin to capitalize on returning human, financial and social capital, and access to social safety nets to minimize individual and household loss in welfare.

- Combat any stigma and discrimination against migrants and any negative connotations with COVID-19 (both in host countries and for those returning to their country of origin) through communication campaigns.

Medium to long term

- Consider introducing wage protection systems and mechanisms to protect workers' wages in cases of company bankruptcy in countries that do not already have this in place (Jureidini, 2017), and extend to all categories of workers, including domestic workers. Alternative mechanisms should be explored to address large-scale economic downturns that make it impossible for employers and governments to sustain social security schemes, including international or regional funds.

- The polarization of Arab migration (outside conflict-induced forced movements) to specific regions (the European Union, or the oil-producing Gulf States) creates a dependence of sending states vis-à-vis receiving countries and increases the vulnerability of immigrants to policies of destination countries. Migrant-sending countries may want to assess the sustainability of mass migration to countries where migrants are not granted any leeway to negotiate better employment and living conditions. Alleviating dependency on single destination states or regions through diversifying host states may be a good start, as is currently being advocated for in Egypt (Rabie, 2019). Tunisia is another example: the country is working to expand placement opportunities for skilled and highly skilled workers outside traditional European destinations, especially France, and has started looking to countries such as Canada.

- Migrant-sending states could enforce better negotiations of bilateral migration agreements to guarantee migrants' protection, as well as empower home state representatives in destination countries (embassies and consulates, for instance). Learning from the experience of other non-Arab states would be useful. The Philippines, for example, has achieved a better (if far from perfect) degree of institutionalization of migration policies and monitoring of migration flows.

- In view of the high degree of informality among migrants, especially in oil-importing and crisis-affected countries in the region, sending states could set up tools to better track the numbers, location, movements and characteristics of their emigrants, in order to devise sustainable migration policies including economic and social reintegration schemes, and be prepared for future crises and large-scale returns. These operations may stimulate cooperation between stakeholders, especially with receiving countries' statistical and administrative authorities. An Egypt-Germany bilateral initiative was established in July 2020 which could be an example of such a "holistic" approach to migration, incorporating the reintegration of returnee workers into the country of origin's economy from the onset of the migration process (Egypt, Ministry of Immigration and Egyptians Affairs Abroad, 2020g). Such data-collection and policy schemes should incorporate all migrants, including the low skilled.

- Continue to reform the *kafala* system. The *kafala*-induced separation between nationals and foreigners in the region, which extends to highly skilled foreign workers present in the Gulf States, became particularly visible during the crisis. The report highlighted the acute vulnerability of foreign workers and migrants to salary cuts and job losses, as compared with nationals, throughout the Arab region. The crisis also emphasized the effects of the *kafala* system on migrants' lack of control over their mobility, from detention in COVID-19-infected compounds to deportation. Furthermore, the subordination of residency to employment uprooted long-term residents, for legal and financial reasons. The sponsorship system is being progressively dismantled everywhere; high growth, less populated countries like Qatar and the United Arab Emirates, who depend economically on foreign workers (Fattah and Abu Omar, 2020), could lead the way towards formally and effectively eradicating the system everywhere in the GCC and the Mashreq.

- Consider abolishing the system of live-in domestic workers; domestic labour should be incorporated under the umbrella of labour laws everywhere, for at least a minimal protection, and better visibility in the public sphere.

- Guarantee a sufficient and regular flow of refugee aid. All aid agencies experience growing financial difficulties in addressing refugees' expanding needs at times of crisis, and this would alleviate host states' increasing burdens in the region. Refugee aid should be unaffected by global economic fluctuations and donors' political considerations in selecting beneficiaries. To that effect, international taxation on households and on business transactions has been considered counterproductive politically and ill-adapted to the current context of economic stagnation. However, the prospect of a tax on financial transactions applied equally in all the major financial markets, based on the Tobin Tax model, could be more promising (Joly, 2015).

To alleviate socio-economic risks and impacts related to remittance flows, countries in the Arab region may consider the following policy recommendations.

Short term

- Keep money transfer services open during the crisis by declaring them an essential service.

- Lower the costs of remittances, preferably by encouraging unilateral private sector efforts, but through fiscal instruments if necessary, such as tax incentives to compensate for reduced fees, targeting money transfer operators (in line with the Sustainable Development Goal of reducing remittance costs to 3 percent or less). Eliminate remittance corridors with costs of higher than 5 percent, in keeping with Sustainable Development Goal 10. Remove any daily transaction limits and encourage mobile money.

- Source countries could identify remittance-dependent households and offer income-smoothing solutions, such as interest-free loans conditioned on future remittances and providing temporary subsidies on essential goods and services, ensuring that households maintain their livelihoods throughout the crisis.

- Consider ensuring access to social protection, including social security and assistance, particularly for the most vulnerable households which depend on remittances to sustain themselves, and ensure that the most vulnerable households have access to affordable health care.

Medium to long term

- Promote competition in the remittance market in both source and destination countries by ensuring legislation and regulations are pro-market and payment systems infrastructure is opened up, eliminating anti-competitive behaviour and increasing the incentive for actors to innovate in-service delivery and product design. Include loan options to invest in productivity enhancing activities for instance, into small and medium enterprises to create jobs and generate income in local economies.

- Reduce information asymmetry on available remittance options and costs to migrants and beneficiaries by investing in information dissemination and awareness-raising campaigns/materials.

- Combine financial literacy and financial inclusion initiatives, in both destination and source countries, with remittance strategies, enabling beneficiaries to make optimal use of remittances through access to financial services, including via savings accounts and microfinance (insurance) products.

- Invest in data collection and analyses to monitor and evaluate the migration remittance development nexus.

- Invest in digital infrastructure, fintech solutions, mobile money, digital skills for migrants and beneficiaries, and access to smartphones or tablets, to support digital remittances and the interconnectivity between transfers and financial products. This will help keep remittances afloat under lockdowns and border closures.

- Expand the access of migrants and remittance recipients to formal bank accounts at affordable costs to facilitate the use of formal channels for remittance transfers.

- Explore diaspora bonds and their enabling environment (engagement with diaspora) to support sovereign resource mobilization.

Annex

Table 1. Arab outward migration by region of destination (2018–2019)

		Region of destination	Arab countries (a)				Europe		
			GCC countries	**% in total**	**All Arab countries**	% in total	EU-28 + Norway + Switzerland	% in total	**All Europe**
		Sources	**(1) (2)**		**(2) (3)**		**(3) (4)**		**(3) (4)**
		Definition of migrant	**(B)**		**(B)**		**(A)**		**(A)**
Country of origin	**Oil-exporting, immigration countries**	Algeria	15,947 (c)	**1.4**	**44,956 (c)**	3.9	984,010	85.0	**985,914**
		Bahrain	5,220	**8.6**	**15,688**	26.0	8,156	13.5	**8,177**
		Kuwait	80,000	**38.0**	**113,988**	54.2	25,134	11.9	**25,590**
		Oman	NA	**NA**	**12,423**	53.7	18,709	80.9	**5,563**
		Qatar	4,131	**13.3**	**16,299**	52.5	5,739	18.5	**5,812**
		Saudi Arabia	137,457	**30.3**	**215,946**	47.6	52,083	11.5	**52,588**
		UAE	58,528	**33.4**	**73,505**	41.9	29,655	16.9	**30,692**
	Oil-importing, developing countries	Djibouti	NA	**NA**	**1,878**	12.1	5,997	38.8	**6,000**
		Egypt	2,642,063	**59.8**	**3,719,925**	84.2	322,387	7.3	**327,520**
		Jordan	710,372	**72.5**	**804,800**	82.1	41,980	4.3	**47,480**
		Morocco	43,795	**1.5**	**56,113**	2.0	2,449,804	86.5	**2,455,612**
		Tunisia	79,306	**12.0**	**113,648**	17.2	472,390	71.4	**475,418**
	LDC/fragile countries	Iraq	79,448	**3.8**	**643,621**	30.9	468,053	22.5	**473,322**
		Lebanon	377,573	**39.6**	**399,618**	41.9	186,727	19.6	**191,356**
		Libya	NA	**NA**	**41,300**	22.9	63,744	35.4	**67,638**
		Somalia	75,167	**3.5**	**595,668**	27.7	294,035	13.7	**297,156**
		Sudan	663,472	**33.2**	**776,806**	38.8	57,209	2.9	**57,877**
		Syria	1,357,719	**15.3**	**4,227,143**	47.6	590,416	6.7	**618,118**
		State of Palestine	178,349 (c)	**9.8**	**1,718,461 (d)**	94.7	5,506	0.3	**21,309**
		Yemen	900,256	**82.7**	**956,785**	87.9	23,966	2.2	**24,725**
	TOTAL (est.) (f) (g)		7,408,803	**24.6**	**14,548,571**	48.2	6,105,700	20.2	**6,177,867**

Sources: in general and unless stated otherwise, estimates are retrieved from receiving countries' statistics.
(1) National population registers and statistics, in Gulf Labour Market and Migration database and publications on Gulf countries (http://gulfmigration.eu/); (http://gulfmigration.org/).
(2) United Nations (2019b).
(3) Receiving countries' statistics (population censuses, population registers, residency and labour permits records).
(4) Organisation for Economic Co-operation and Development (OECD)-International Migration Database, 31 December 2017 and 2018.

Abbreviations: **GCC, Gulf Cooperation Council; UAE, United Arab Emirates; LDC, Least Developed Countries.**

Notes: **Definition of migrant:** (A) country of birth; (B) country of nationality.
The figures usually do not include foreign residents in irregular situation.
Data include figures for asylum seekers and refugees (registered by the Office of the United Nations High Commissioner for Refugees (UNHCR) and United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA), unless these refugees are non-migrant nationals.
(a) Most Gulf States provide scarce or no data on migrants disaggregated by single country of citizenship. Due to the absence of data for some destination countries, especially major ones like Saudi Arabia and the UAE, the figures presented here can be underestimated.
At the same time, available figures may be also overestimated, as they comprise a large share of foreign or stateless nationals (especially Palestinians), who have been settled in Gulf or other receiving countries (Lebanon, Syria, Iraq) for decades (i.e. non-migrant, Gulf-born second-and third- generation Palestinians, or stateless "bidouns" in Kuwait).
(b) Includes Turkey and Israel.
(d) UNRWA-registered Palestinian refugees, most of whom are born in Jordan as Jordanian nationals (i.e. not migrants in the UN sense), are not included.
(e) Includes Syrian refugees registered by the Turkish government, not included in the figures of the foreign-born population residing in the country taken from censuses and population registry.
(f) Due to missing data for some destinations countries, and due to the exclusion of migrants in irregular administrative situation from receiving countries' statistics, totals may be underestimated.
(g) Total provides the sum of population numbers at different dates for the period 2018 - 2019. It is not the exact total population at any of these dates.

	Americas				Non-Arab African countries		Non-Arab Asian countries (b)		Oceania		TOTAL (est.) (f) (g)
% in total	USA and Canada	% in total	**All Americas**	**% in total**		**% in total**		**% in total**		**% in total**	
	(3) (4)		**(2)**		**(2)**		**(2) (3)**		**(2) (4)**		
	(A)		**(A)**		**(B)**		**(A) (B)**		**(A)**		
85.1	67,045	5.8	**89,564**	**7.7**	15,193	**1.3**	19,693	**1.7**	2,993	**0.3**	**1,158,313**
13.5	2,600	4.3	**2,676**	**4.4**	336	**0.6**	31,595	**52.3**	1,970	**3.3**	**60,442**
12.2	49,464	23.5	**49,627**	**23.6**	186	**0.1**	13,693	**6.5**	7,320	**3.5**	**210,404**
24.1	8,675	37.5	**1,848**	**8.0**	49	**0.2**	1,081	**4.7**	2,160	**9.3**	**23,124**
18.7	2,905	9.4	**3,013**	**9.7**	0	**0.0**	2,259	**7.3**	3,635	**11.7**	**31,018**
11.6	111,531	24.6	**114,145**	**25.2**	4,538	**1.0**	50,514	**11.1**	15,598	**3.4**	**453,329**
17.5	23,220	13.2	**36,736**	**21.0**	3,806	**2.2**	19,002	**10.8**	11,550	**6.6**	**175,291**
38.8	2,370	15.3	**2,370**	**15.3**	4,013	**26.0**	996	**6.4**	200	**1.3**	**15,457**
7.4	251,554	5.7	**257,163**	**5.8**	14,884	**0.3**	48,750	**1.1**	47,590	**1.1**	**4,415,832**
4.8	92,658	9.5	**95,331**	**9.7**	96	**0.0**	24,319	**2.5**	7,820	**0.8**	**979,846**
86.7	157,176	5.5	**159,969**	**5.6**	8,426	**0.3**	148,970	**5.3**	2,957	**0.1**	**2,832,047**
71.9	38,220	5.8	**38,453**	**5.8**	1,181	**0.2**	31,194	**4.7**	1,378	**0.2**	**661,272**
22.7	302,933	14.6	**304,035**	**14.6**	401	**0.0**	566,462	**27.2**	93,606	**4.5**	**2,081,447**
20.0	216,847	22.7	**246,714**	**25.8**	9,314	**1.0**	12,675	**1.3**	94,830	**9.9**	**954,507**
37.6	8,955	5.0	**19,855**	**11.0**	10,101	**5.6**	38,226	**21.2**	2,840	**1.6**	**179,960**
13.8	134,715	6.3	**134,804**	**6.3**	1,101,792	**51.2**	14,713	**0.7**	9,500	**0.4**	**2,153,633**
2.9	58,205	2.9	**58,232**	**2.9**	1,085,119	**54.2**	2,961	**0.1**	19,750	**1.0**	**2,000,745**
7.0	160,289	1.8	**182,499**	**2.1**	868	**0.0**	3,820,623 (e)	**43.0**	27,490	**0.3**	**8,876,741**
1.2	1,800	0.1	**55,905**	**3.1**	330	**0.0**	14,739	**0.8**	3,130	**0.2**	**1,813,874**
2.3	64,098	5.9	**64,129**	**5.9**	7,630	**0.7**	34,872	**3.2**	910	**0.1**	**1,089,051**
20.5	1,755,260	5.8	**1,917,068**	**6.4**	2,268,263	**7.5**	4,897,337	**16.2**	357,227	**1.2**	**30,166,333**

Table 2. Inward migration to Arab countries by region of origin (2018–2019)

Region of origin		Arab countries*		Africa		Asia	
Country of destination		Number	% in total	Number	% in total	Number	% in total
Algeria	(1)(4)	258,395 (a)	**96.8**	1,381 (b)	**0.5**	2,308	**0.9**
Bahrain	(1)(2)	149,429	**19.1**	5,743	**0.7**	572,523	**73.2**
Kuwait	(2)	1,261,062	**39.2**	47,227	**1.5**	1,868,208	**58.0**
Oman	(1)(2)	159,845	**7.3**	390	**0.0**	2,016,851	**91.9**
Qatar	(1)(2)	340,584	**13.6**	14,338	**0.6**	1,828,669	**73.2**
Saudi Arabia	(1)(2)	3,378,577	**25.8**	160,192	**1.2**	9,167,287	**69.9**
United Arab Emirates	(1)(2)	1,639,267	**19.1**	66,359	**0.8**	6,555,424	**76.3**
GCC countries		**6,928,764**	**22.8**	**294,249**	**1.0**	**22,008,962**	**72.4**
Total oil-exporting, immigration countries		**7,187,159**	**23.4**	**295,630**	**1.0**	**22,011,270**	**71.8**
Djibouti	(1)	95,790	**83.0**	12,650	**11.0**	N.A.	**N.A.**
Egypt	(1)(4)	696,614 (d) (e)	**85.9**	56,925 (b)	**7.0**	15,390	**1.9**
Jordan	(1)(3)	2,346,380 (f)	**94.7**	655	**0.0**	119,970	**4.8**
Morocco	(1)(3)	25,466	**25.8**	6,600 (c)	**6.7**	1,300	**1.3**
Tunisia	(1)(3)	29,337	**51.1**	4,417	**7.7**	N.A.	**N.A.**
Total oil-importing, developing countries		**3,193,587**	**89.7**	**81,247**	**2.3**	**136,660**	**3.8**
Iraq	(1)	306,007	**83.1**	1,331	**0.4**	33,945	**9.2**
Lebanon	(1)(3)(4)	1,662,024 (i)	**89.4**	151,654	**8.2**	43,180	**2.3**
Libya	(1)	678,800	**83.0**	20,793	**2.5**	52,875	**6.5**
Somalia	(1)	7,051	**13.5**	19,388	**37.2**	N.A.	**N.A.**
State of Palestine	(1)	160,857	**63.4**	N.A.	**N.A.**	62,458	**24.6**
Sudan	(1)	18,633	**1.5**	1,174,620	**96.0**	2,944	**0.2**
Syria	(1)	799,967	**92.2**	N.A.	**N.A.**	1,018	**0.1**
Yemen	(1)	332,270	**86.2**	18,457	**4.8**	22	**0.0**
Total LDC/fragile countries		**3,965,609**	**68.1**	**1,386,243**	**23.8**	**196,442**	**3.4**
TOTAL (estimates) (m) (n)		**14,346,355**	**35.8**	**1,763,120**	**4.4**	**22,344,372**	**55.8**

Sources: in general and unless stated otherwise, estimates are retrieved from receiving countries' statistics.
(1) United Nations (2019b).
(2) National population registers and statistics, in Gulf Labour Market and Migration database and publications on Gulf countries (http://gulfmigration.org/; http://gulfmigration.eu/).
(3) Receiving countries' statistics (population censuses, population registers, residency and labour permits records).
(4) UNHCR (2020).

Abbreviations: **GCC, Gulf Cooperation Council; UAE, United Arab Emirates; LDC, Least Developed Countries.**

Notes: *"Arab countries" are the same countries as the countries listed as destinations, i.e. the Arab League 22 member states, minus Mauritania and the Comoros.
A migrant is defined as a resident in a given country who was born outside that country, as a foreigner. The migrant can be still a foreigner in the residence country, or be naturalized.
Most Arab countries do not disclose the numbers of expatriates by place of birth and instead apply the nationality criteria. Therefore, second- and third-generation descendants of migrants, born in their country of residence, cannot be identified in statistics and separated from the "migrants" (first generation, born-abroad immigrants).
Figures of migrants in major immigration countries (especially, the Gulf States) thus include an (unknown) share of Gulf-born foreigners or stateless persons, who do not conform to the definition of migrant adopted here, i.e. a person born abroad as a non-national of his/her current country of residence.
Most Arab countries do not publish statistics on immigrants, whether agregated or disagregated by country or region of origin. Therefore, the figures presented here are underestimated.
Receiving countries' figures usually do not include foreign residents in irregular situation.
Data include figures for refugees (registered by the Office of the United Nations High Commissioner for Refugees (UNHCR) and UNRWA (United Nations Relief and Works Agency for Palestine Refugees), in countries where refugees, even born in their country of residence, were not naturalized.
(a) Includes 90,000 Sahraoui refugees from Tindouf camps.
(b) No data available from the country's official statistics. The estimate is the figure of sub-Saharan African refugees and asylum seekers in the country (UNHCR records).
(c) No data. Estimates taken from United Nations (2019b).
(d) Figures of Sudanese migrants are taken from UNHCR records (Sudanese refugees and asylum seekers). Sudanese are estimated to number between 2 and 4 million, but often reside and work informally and are not captured in statistics. No figures from 2017 Egypt census were available on foreign residents by nationality as of July 2020.
(e) The figure includes an estimated 300,000 Libyans allegedly residing in Egypt. (https://www.al-monitor.com/pulse/originals/2019/03/egypt-libya-agreement-border-work-illegal-smuggling.html).

Europe		North America		Other/unknown		TOTAL (2019) (m)(n)
Number	% in total	Number	% in total	Number	% in total	
3,649	**1.4**	1,087	**0.4**	N.A.	**N.A.**	**266,820 (c)**
4,101	**0.5**	1,178	**0.2**	49,026	**6.3**	**782,000 (h)**
18,076	**0.6**	20,513	**0.6**	3,439	**0.1**	**3,218,525 (g) (h)**
16,349	**0.7**	N.A.	**N.A.**	N.A.	**N.A.**	**2,193,435**
8,457	**0.3**	4,325	**0.2**	302,684	**12.1**	**2,499,057 (k)**
N.A.	**N.A.**	N.A.	**N.A.**	408,915	**3.1**	**13,114,971 (h)**
49,744	**0.6**	15,390	**0.2**	261,072	**3.0**	**8,587,256**
96,727	**0.3**	**41,406**	**0.1**	**1,025,136**	**3.4**	**30,395,244**
100,376	**0.3**	**42,493**	**0.1**	**1,025,136**	**3.3**	**30,662,064**
N.A.	**N.A.**	N.A.	**N.A.**	6,901	**6.0**	**115,341 (c)**
33,718	**4.2**	6,624	**0.8**	1,372	**0.2**	**810,643**
6,072	**0.2**	3,069	**0.1**	491	**0.0**	**2,476,637**
47,765	**48.5**	1,926	**2.0**	15,517	**15.7**	**98,574**
12,468	**21.7**	616	**1.1**	10,617	**18.5**	**57,455**
100,023	**2.8**	**12,235**	**0.3**	**34,898**	**1.0**	**3,558,650**
279	**0.1**	0	**0.0**	26,500	**7.2**	**368,062 (c)**
866	**0.0**	647	**0.0**	N.A.	**N.A.**	**1,858,371 (j)**
50,423	**6.2**	13,511	**1.7**	1,814	**0.2**	**818216 (c)**
N.A.	**N.A.**	N.A.	**N.A.**	25,692	**49.3**	**52131 (c)**
N.A.	**N.A.**	7,771	**3.1**	22,649	**8.9**	**253,735 (l)**
N.A.	**N.A.**	N.A.	**N.A.**	26,895	**2.2**	**1,223,092**
N.A.	**N.A.**	N.A.	**N.A.**	66,863	**7.7**	**867,848**
N.A.	**N.A.**	N.A.	**N.A.**	34,879	**9.0**	**385,628 (c)**
51,568	**0.9**	**21,929**	**0.4**	**205,292**	**3.5**	**5,827,083**
251,967	**0.6**	**76,657**	**0.2**	**1,265,326**	**3.2**	**40,047,797**

(f) Includes some 650,000 foreign residents originating from Palestine, figure updated from the Jordanian census of 2015.
This figure was considered more reliable than the figure of the 2.2 milllion Palestinian refugees registered with UNRWA in Jordan in 2019, because most of the registered refugees from Palestine are descendants of forced migrants. They are neither migrant (they are born in Jordan), nor foreign nationals (they are Jordanian nationals).
(g) Administrative data of residence permit holders, disagregated by region of origin in Kuwaiti statistics (31 December 2018).
(h) Figures of foreign resident population for mid-2019, taken from the country's statistics.
(i) Includes some 300,000 Palestinian refugees from 1948 and 1967 and their descendents, considered foreign nationals in Lebanon.
(j) Author's estimates, using figures of 1. refugees registered with UNHCR, and 2. figures of labour permit holders from the Lebanese Ministry of Labour, disaggregated by nationality (selected nationalities only). The figures do not include the many foreign residents living and working informally.
(k) Author's calculation, using several Qatari statistical sources.
(l) Does not include the Jewish/Israeli settlers in the West Bank.
(m) Due to missing data for some destinations countries, and due to the exclusion of migrants in irregular administrative situation from receiving countries' statistics, totals may be underestimates.
(n) Total provides the sum of population numbers at different dates for the period 2018 - 2019. It is not the exact total population at any of these dates.

Table 3. Registered refugees in the Arab region, by Arab country/region of origin (2019)

	→ Country/region of origin Country of destination ↓	Algeria	Bahrain	Djibouti	Egypt	Iraq	Jordan	Kuwait	Lebanon	Libya	Morocco	Oman	Qatar	Saudi Arabia	Somalia
Oil-exporting countries	Algeria					17				35					
	Bahrain				5	290									
	Kuwait			5	24	638	5		5						660
	Oman					549									
	Qatar				23	214									9
	Saudi Arabia					61									16
	United Arab Emirates	5			23	1,352	31	5	39	5	15			5	18
	Total	**5**	**0**	**5**	**75**	**3,121**	**36**	**5**	**44**	**40**	**15**	**0**	**0**	**5**	**703**
Oil-importing, developing countries	Djibouti					20									13,396
	Egypt			22		6,771	22			5				22	6,702
	Jordan	5			702	67,216	1,884	5	123	200	15			34	744
	Morocco	14			5	142			16	60					18
	Tunisia	22			5	25			6	55					189
	Total	**41**	**0**	**22**	**712**	**74,174**	**1,906**	**5**	**145**	**320**	**15**	**0**	**0**	**56**	**21,049**
LDC/fragile countries	Iraq		23		22	5		209	10					5	11
	Lebanon	14	24		408	13,468	163	9	4,983	21	12			30	24
	Libya					2,312									4,844
	Somalia			14	26	21									134
	State of Palestine														
	Sudan						6	5							609
	Syria	5	5		43	56,002	19		28	21	5			9	377
	Yemen			10	26	3,394	27		5						253,054
	Total	**19**	**52**	**24**	**525**	**75,202**	**215**	**223**	**5,026**	**42**	**17**	**0**	**0**	**44**	**259,053**
TOTAL		**65**	**52**	**51**	**1,312**	**152,497**	**2,157**	**233**	**5,215**	**402**	**47**	**0**	**0**	**105**	**280,805**

Source: United Nations High Commissioner for Refugees (UNHCR) (2020) and United Nations Relief and Works Agency for Palestine Refugees (UNRWA) (2020a).

Notes: Definition of population: UNHCR: registered refugees, asylum seekers, stateless persons and other populations of interest, 2019 data.
UNRWA: Total registered Palestinian refugees, as of 31 December 2019.
UNRWA figures of Palestinian refugees from Syria are estimates, given the volatility of the situation.
Refugees are not necessarily migrants (i.e. born abroad as a non-national of the current host state), as some have been in their host country for generations (Palestinians) and may be naturalized in the host state (in Jordan, for instance).

State of Palestine	Sudan	Syria	Tunisia	United Arab Emirates	Yemen	Western Sahara	Arab countries	Africa	Asia	Europe	Americas	Stateless	Unknown	TOTAL refugees
173	34	7,757			257	90,000	**98,273**	1,962	13					**100,248**
					14		**309**							**309**
5	20	206			15		**1,583**	45	131	5		92,020		**93,784**
		8					**557**		5					**562**
	13	34			5		**298**	5				1,200		**1,503**
22	5	2,372	7		71		**2,554**	60	28			70,000		**72,642**
29	19	6,919			67		**8,532**	26	70	5				**8,633**
229	**91**	**17,296**	**7**	**0**	**429**	**90,000**	**112,106**	**2,098**	**247**	**10**	**0**	**163,220**	**0**	**277,681**
	12	10			5,322		**18,760**	12,027	5					**30,792**
70,010	47,763	129,210	5		9,160		**269,692**	54,385	588	32		10	5	**324,712**
2,419,768	6,010	654,692	21	5	14,792		**3,166,216**	264	100					**3,166,580**
183	42	3,676	5		843		**5,004**	4,531	180					**9,715**
45	283	1,382			31		**2,043**	1,187	35					**3,265**
2,490,006	**54,110**	**788,970**	**31**	**5**	**30,148**	**0**	**3,461,715**	**72,394**	**908**	**32**	**0**	**10**	**5**	**3,535,064**
7,965	780	245,810	5		147		**254,992**	50	31,891					**286,933**
539,480	2,201	912,518	11		152		**1,473,518**	978	272					**1,474,768**
9,736	25,520	34,700			94		**77,206**	13,668	22					**90,896**
21	20	266			13,293		**13,795**	22,017	11					**35,823**
2,687,893							**2,687,893**							**2,687,893**
		93,495			1,679		**95,794**	977,815	5		5		937	**1,074,556**
647,308	810	0	10		269		**704,911**	212	1,422			160,000	5	**866,550**
939	648	3,958					**262,061**	17,098	30					**279,189**
3,893,342	**29,979**	**1,290,747**	**26**	**0**	**15,634**	**0**	**5,570,170**	**1,031,838**	**33,653**	**0**	**5**	**160,000**	**942**	**6,796,608**
6,383,577	**84,180**	**2,097,013**	**64**	**5**	**46,211**	**90,000**	**9,143,991**	**1,106,330**	**34,808**	**42**	**5**	**323,230**	**947**	**10,609,353**

Table 4. Registered refugees from the Arab region, by Arab country of origin and region of destination (2019)

	Region of destination / Country of origin	Arab countries	Europe: EU-28+ Switzerland+ Norway	Europe: All Europe	Africa
Oil-exporting countries	Algeria	65	9,555	9,718	0
	Bahrain	52	344	344	0
	Kuwait	233	1,997	1,997	0
	Oman	0	60	60	974
	Qatar	0	20	20	0
	Saudi Arabia	105	801	801	0
	United Arab Emirates	5	87	87	0
	Total	**460**	**12,864**	**13,027**	**974**
Oil-importing, developing countries	Djibouti	37	960	960	63
	Egypt	1,312	16,031	16,409	57
	Jordan	2,157	2,391	2,391	0
	Morocco	47	10,704	11,242	12
	Tunisia	1,092	2,744	2,744	0
	Total	**4,645**	**32,830**	**33,746**	**132**
LDC/ fragile countries	Iraq	151,341	294,287	295,322	66
	Lebanon	5,215	7,161	7,196	40
	Libya	402	16,603	16,700	65
	Somalia	278,383	129,471	129,697	532,187
	State of Palestine	3,695,684*	17,112	17,234	196
	Sudan	71,420	47,832	47,917	673,043
	Syria	2,079,663	1,037,718	1,040,356	2,392
	Yemen	46,164	11,612	11,854	2,538
	Total	**6,328,272**	**1,561,796**	**1,566,276**	**1,210,527**
	TOTAL	**6,333,377**	**1,607,490**	**1,613,049**	**1,211,633**

Source: United Nations High Commissioner for Refugees (UNHCR) (2020) and United Nations Relief and Works Agency for Palestine Refugees (UNRWA) (2020a).

Notes: Definition of population: UNHCR: registered refugees, asylum seekers, stateless persons and other populations of interest, 2019 data.
UNRWA: Total registered Palestinian refugees, as of 31 December 2019.
* does not comprise the 2.7 million Palestinian refugees recorded within Palestine.
UNRWA figures of Palestinian refugees from Syria are estimates, given the volatility of the situation.
Refugees are not necessarily migrants (i.e. born abroad as a non-national of the current host state), as some have been in their host country for generations (Palestinians) and may be naturalized in the host state (in Jordan, for instance).

Asia	Canada and USA	South and Latin America	Oceania	TOTAL refugees
277	1,892	91	41	**12,084**
0	165	0	140	**701**
17	390	5	73	**2,715**
0	35	0	5	**1,074**
0	53	0	0	**73**
28	1,859	25	383	**3,201**
0	241	0	6	**339**
322	**4,635**	**121**	**648**	**20,187**
0	2,111	11	5	**3,187**
1,180	22,704	549	2,014	**44,225**
66	3,916	105	414	**9,049**
534	617	731	27	**13,210**
116	651	128	15	**4,746**
1,896	**29,999**	**1,524**	**2,475**	**74,417**
207,217	9,556	976	14,463	**678,941**
50	2,486	2,315	1,553	**18,855**
100	3,402	77	1,304	**22,050**
6,308	5,190	767	763	**953,295**
1,772	2,666	1,072	686	**3,719,310**
8,900	4,535	235	863	**806,913**
3,596,967	11,417	9,733	2,502	**6,743,030**
6,160	3,585	382	196	**70,879**
3,827,474	**42,837**	**15,557**	**22,330**	**13,013,273**
3,829,692	**77,471**	**17,202**	**25,453**	**13,107,877**

Table 5. Share of immigrants in total populations, by country/group of countries of residence (2019)

Country of residence	Total population mid-year	Total immigrants	Share of foreign immigrants in total population (%)
	2019	2019	
Algeria	43,053,054	266,820	0.6
Bahrain	1,641,172	782,000	47.6
Kuwait	4,207,083	3,218,525	76.5
Oman	4,974,986	2,193,435	44.1
Qatar	2,832,067	2,499,057	88.2
Saudi Arabia	34,268,528	13,114,971	38.3
United Arab Emirates	9,770,529	8,587,256	87.9
GCC countries	**57,694,365**	**30,395,244**	**52.7**
Oil-exporting countries	**100,747,419**	**30,662,064**	**30.4**
Djibouti	973,560	115,341	11.8
Egypt	100,388,073	810,643	0.8
Jordan	10,101,694	2,476,637	24.5
Morocco	36,471,769	98,574	0.3
Tunisia	11,694,719	57,455	0.5
Developing, oil-importing countries	**159,629,815**	**3,558,650**	**2.2**
Iraq	39,309,783	368,062	0.9
Lebanon	6,855,713	1,858,371	27.1
Libya	6,777,452	818,216	12.1
Somalia	15,442,905	52,131	0.3
State of Palestine	4,981,420	253,735	5.1
Sudan	42,813,238	1,223,092	2.9
Syrian Arab Republic	17,070,135	867,848	5.1
Yemen	29,161,922	385,628	1.3
Fragile/crisis countries	**162,412,568**	**5,827,083**	**3.6**
TOTAL	**422,789,802**	**40,047,797**	**9.5**

Sources: United Nations (2019b) and Table 2.

Table 6. Share of emigrants in total populations, by country/group of countries of origin (2019)

Country of origin	Total emigrants (est.)	National population (resident nationals + emigrants)	Share of emigrants among nationals (%)
Algeria	1,158,313	43,944,547	2.6
Bahrain	60,442	919,614	6.6
Kuwait	210,404	1,198,962	17.5
Oman	23,124	2,804,675	0.8
Qatar	31,018	364,028	8.5
Saudi Arabia	453,329	21,606,886	2.1
United Arab Emirates	175,291	1,358,564	12.9
GCC countries	**953,608**	**28,252,729**	**3.4**
Oil-exporting countries	**2,111,921**	**72,197,276**	**2.9**
Djibouti	15,457	873,676	1.8
Egypt	4,415,832	103,993,262	4.2
Jordan	979,846	8,604,903	11.4
Morocco	2,832,047	39,205,242	7.2
Tunisia	661,272	12,298,536	5.4
Developing, oil-importing countries	**8,904,454**	**164,975,619**	**5.4**
Iraq	2,081,447	41,023,168	5.1
Lebanon	954,507	5,951,849	16.0
Libya	179,960	6,139,196	2.9
Somalia	2,153,633	17,544,407	12.3
State of Palestine	1,813,874	6,541,559	27.7
Sudan	2,000,745	43,590,891	4.6
Syrian Arab Republic	8,876,741	25,079,028	35.4
Yemen	1,089,051	29,865,345	3.6
Fragile/crisis countries	**19,149,958**	**175,735,443**	**10.9**
TOTAL	**30,166,333**	**412,908,338**	**7.3**

Sources: United Nations (2019b) and Table 1.

Table 7. Share of registered refugees in resident populations, by Arab country/group of countries of residence (2019)

Country of residence	Foreign refugees in resident population	Total population mid-year 2019	Share of foreign refugees among residents (%)
Algeria	100,248	43,053,054	0.2
Bahrain	309	1,641,172	0.0
Kuwait	93,784	4,207,083	2.2
Oman	562	4,974,986	0.0
Qatar	1,503	2,832,067	0.1
Saudi Arabia	72,642	34,268,528	0.2
United Arab Emirates	8,633	9,770,529	0.1
Total GCC countries	**177,433**	**57,694,365**	**0.3**
Total oil-exporting countries	**277,681**	**100,747,419**	**0.3**
Djibouti	30,792	973,560	3.2
Egypt	324,712	100,388,073	0.3
Jordan	3,166,580	10,101,694	31.3
Morocco	9,715	36,471,769	0.0
Tunisia	3,265	11,694,719	0.0
Total oil-importing countries	**3,535,064**	**159,629,815**	**2.2**
Iraq	286,933	39,309,783	0.7
Lebanon	1,474,768	6,855,713	21.5
Libya	90,896	6,777,452	1.3
Somalia	35,823	15,442,905	0.2
State of Palestine	2,687,893	4,981,420	54.0
Sudan	1,074,556	42,813,238	2.5
Syria	866,550	17,070,135	5.1
Yemen	279,189	29,161,922	1.0
Total LDC/crisis-affected countries	**6,796,608**	**162,412,568**	**4.2**
TOTAL	**10,609,353**	**422,789,802**	**2.5**

Sources: United Nations (2019b), United Nations High Commissioner for Refugees (UNHCR) (2020) and United Nations Relief and Works Agency for Palestine Refugees (UNRWA) (2020a).

Abbreviations: **GCC, Gulf Cooperation Council; LDC, Least Developed Countries.**

Notes: Definition of population: UNHCR: registered refugees, asylum seekers, stateless persons and other populations of interest, 2019 data.
UNRWA: Total registered Palestinian refugees, as of 31 December 2019.
UNRWA figures of Palestinian refugees from Syria are estimates, given the volatility of the situation.
Refugees are not necessarily migrants (i.e., born abroad as a non-national of the current host state), as some have been in their host country for generations (Palestinians) and may be naturalized in the host state (in Jordan, for instance).

Table 8. Share of refugee citizens in national populations, by country/group of countries of origin (2019)

Country of origin	Total refugee citizens from the country	Total emigrants (est.)	National population (resident nationals + emigrants)	Share of refugees in national population (%)
Algeria	12,084	1,158,313	43,944,547	0.0
Bahrain	701	60,442	919,614	0.1
Kuwait	2,715	210,404	1,198,962	0.2
Oman	1,074	23,124	2,804,675	0.0
Qatar	73	31,018	364,028	0.0
Saudi Arabia	3,201	453,329	21,606,886	0.0
United Arab Emirates	339	175,291	1,358,564	0.0
Total oil-exporting countries	**20,187**	**2,111,921**	**72,197,276**	**2.9**
Djibouti	3,187	15,457	873,676	0.4
Egypt	44,225	4,415,832	103,993,262	0.0
Jordan	9,049	979,846	8,604,903	0.1
Morocco	13,210	2,832,047	39,205,242	0.0
Tunisia	4,746	661,272	12,298,536	0.0
Total oil-importing countries	**74,417**	**8,904,454**	**164,975,619**	**5.4**
Iraq	678,941	2,081,447	41,023,168	1.7
Lebanon	18,855	954,507	5,951,849	0.3
Libya	22,050	179,960	6,139,196	0.4
Somalia	953,295	2,153,633	17,544,407	5.4
State of Palestine	3,719,310	1,813,874	6,541,559	56.9
Sudan	806,913	2,000,745	43,590,891	1.9
Syria	6,743,030	8,876,741	25,079,028	26.9
Yemen	70,879	1,089,051	29,865,345	0.2
Total LDC/crisis-affected countries	**9,402,908**	**19,149,958**	**175,735,443**	**10.9**
TOTAL	**9,497,512**	**30,166,333**	**413,208,338**	**2.3**

Sources: United Nations (2019b), United Nations High Commissioner for Refugees (UNHCR) (2020) and United Nations Relief and Works Agency for Palestine Refugees (UNRWA) (2020a).

Abbreviations: **GCC, Gulf Cooperation Council; LDC, Least Developed Countries**

Notes: Definition of population: UNHCR: registered refugees, asylum seekers, stateless persons and other populations of interest, 2019 data.
UNRWA: Total registered Palestinian refugees, as of 31 December 2019.
UNRWA figures of Palestinian refugees from Syria are estimates, given the volatility of the situation.
* Results for Palestine are incoherent because most Palestinian refugees are not migrants (i.e. born abroad as a non-national of the current host state).

Table 9. Share of refugees among national emigrants by country/group of countries of origin (2019)

Country of origin	Total refugee citizens from the country	Total emigrants (est.)	Share of refugees among emigrants (%)
Algeria	12,084	1,158,313	1.0
Bahrain	701	60,442	1.2
Kuwait	2,715	210,404	1.3
Oman	1,074	23,124	4.6
Qatar	73	31,018	0.2
Saudi Arabia	3,201	453,329	0.7
United Arab Emirates	339	175,291	0.2
GCC countries	**8,103**	**953,608**	**0.8**
Oil-exporting countries	**20,187**	**2,111,921**	**1.0**
Djibouti	3,187	15,457	20.6
Egypt	44,225	4,415,832	1.0
Jordan	9,049	979,846	0.9
Morocco	13,210	2,832,047	0.5
Tunisia	4,746	661,272	0.7
Developing, oil-importing countries	**74,417**	**8,904,454**	**0.8**
Iraq	678,941	2,081,447	32.6
Lebanon	18,855	954,507	2.0
Libya	22,050	179,960	12.3
Somalia	953,295	2,153,633	44.3
State of Palestine*	3,719,310	1,813,874	205.0
Sudan	806,913	2,000,745	40.3
Syria	6,743,030	8,876,741	76.0
Yemen	70,879	1,089,051	6.5
LDC/crisis-affected countries	**9,402,908**	**19,149,958**	**49.1**
TOTAL	**9,497,512**	**30,166,333**	**31.5**

Sources: Table 1; United Nations High Commissioner for Refugees (UNHCR) (2020) and United Nations Relief and Works Agency for Palestine Refugees (UNRWA) (2020a).

Abbreviations: **GCC, Gulf Cooperation Council; LDC, Least Developed Countries**

Notes: Definition of population: UNHCR: registered refugees, asylum seekers, stateless persons and other populations of interest, 2019 data.
UNRWA: Total registered Palestinian refugees, as of 31 December 2019.
UNRWA figures of Palestinian refugees from Syria are estimates, given the volatility of the situation.
*** Results for Palestine are incoherent because most Palestinian refugees are not migrants (i.e. born abroad as a non-national of the current host state).**

Table 10. Share of refugees among resident immigrants by country/group of countries of residence (2019)

Major area, region, country or area of destination	Foreign refugees in resident population*	Total immigrants*	Share of refugees among immigrants (%) (Palestinians excluded)
Algeria	100,075	235,286	42.5
Bahrain	309	777,084	0.0
Kuwait	93,779	3,203,434	2.9
Oman	562	2,193,435	0.0
Qatar	1,503	2,493,351	0.1
Saudi Arabia	72,620	13,114,971	0.6
United Arab Emirates	8,604	8,529,811	0.1
GCC countries	**177,377**	**30,312,086**	**0.6**
Oil-exporting countries	**277,452**	**30,547,372**	**0.9**
Djibouti	30,792	115,341	26.7
Egypt	254,702	676,563	37.6
Jordan	746,812	1,776,637	42.0
Morocco	9,532	98,574	9.7
Tunisia	3,220	56,892	5.7
Developing, oil-importing countries	**1,045,058**	**2,724,007**	**38.4**
Iraq	278,968	355,720	78.4
Lebanon	935,288	1,558,371	60.0
Libya	81,160	514,615	15.8
Somalia	35,802	52,131	68.7
State of Palestine	0	253,735	0.0
Sudan	1,074,556	1,223,092	87.9
Syrian Arab Republic	219,242	272,001	80.6
Yemen	278,250	381,815	72.9
LDC/crisis-affected countries	**2,903,266**	**4,611,480**	**63.0**
TOTAL	**4,225,776**	**37,882,859**	**11.2**

Sources: Table 2; United Nations High Commissioner for Refugees (UNHCR) (2020) and United Nations Relief and Works Agency for Palestine Refugees (UNRWA) (2020a).

Abbreviations: **GCC, Gulf Cooperation Council; LDC, Least Developed Countries**

Notes: Definition of population: UNHCR: registered refugees, asylum seekers, stateless persons and other populations of interest, 2019 data.
UNRWA: Total registered Palestinian refugees, as of 31 December 2019.
* UNRWA and UNHCR-registered Palestinian refugees are not included.
UNRWA figures of Palestinian refugees from Syria are estimates, given the volatility of the situation.
Refugees are not necessarily migrants (i.e. born abroad as a non-national of the current host state), as some have been in their host country for generations (Palestinians) and may be naturalized in the host state (in Jordan, for instance).

Table 11. Some demographic characteristics of immigrant populations by country of residence (2019)

Major area, region, country or area of destination	Female migrants as a percentage of the international migrant stock	Sex ratio (men for 100 women)	% of children (0-14) in migrant population
Source	A	B	A
Algeria	47.2	112	10.8
Bahrain	27.7	261	6.0
Kuwait	33.6	197	16.0
Oman	16.4	510	8.3
Qatar	17.2	481	12.3
Saudi Arabia	31.4	218	15.2
United Arab Emirates	26.3	280	13.4
Djibouti	47.4	111	14.2
Egypt	46.2	116	10.9
Jordan	49.6	101	40.1
Morocco	49.8	101	16.5
Tunisia	48.2	107	14.0
Iraq	41.8	139	24.1
Lebanon	51.9	93	28.4
Libya	28.8	247	16.1
Somalia	47.9	109	30.0
State of Palestine	55.7	80	8.8
Sudan	50.4	99	37.6
Syrian Arab Republic	48.8	105	14.5
Yemen	47.5	110	26.5

Source: A, United Nations (2019b); B, Author's calculation, based on A.

Table 12. Occupational distribution of non-Kuwaitis, Kuwait (2016)

	Arabs	%	Asians	%
Legislators, senior officials and managers	28,358	4%	18,520	1%
Professionals	91,365	14%	32,996	2%
Technicians and associate professionals	30,004	5%	66,364	4%
Clerks	68,889	10%	47,231	3%
Service workers and shop and market sales workers	130,953	20%	596,813	36%
Skilled agricultural and fishery workers	5,507	1%	17,660	1%
Craft and related trades workers	81,116	12%	189,601	11%
Production supervisors and foremen	93,529	14%	372,052	22%
Regular work professionals	90,159	14%	240,510	14%
Not stated	46,696	7%	83,066	5%
Total	**666,576**	**100%**	**1,664,813**	**100%**

Source: Gulf Labour Markets, Migration, and Population (GLMM) (2018a).

Table 13. Occupational distribution of selected foreign workers, United Arab Emirates (2008)

	United Arab Emirates	Non-Gulf Cooperation Council Arab countries	%	Asian countries (non-Arab)	%
Legislators, senior officials and managers	19,398	38,558	11%	102,224	4%
Professionals	33,006	71,190	21%	122,280	5%
Technicians and associate professionals	33,596	58,971	17%	202,882	8%
Clerks	17,132	27,943	8%	141,652	6%
Service workers and shop and market sales workers	4,866	46,343	14%	314,973	13%
Skilled agricultural and fishery workers	70	466	0%	5,747	0%
Craft and related trades workers	2,128	47,661	14%	788,823	31%
Plant and machine operators and assemblers	3,806	25,567	8%	452,748	18%
Elementary occupations	2,971	19,454	6%	364,017	15%
Not stated	49	1,638	0%	12,446	0%
Total	**117,022**	**337,791**	**100%**	**2,507,792**	**100%**

Source: Gulf Labour Markets, Migration, and Population (GLMM) (2018a).

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