

The Omani Labour Market: Patterns and Challenges

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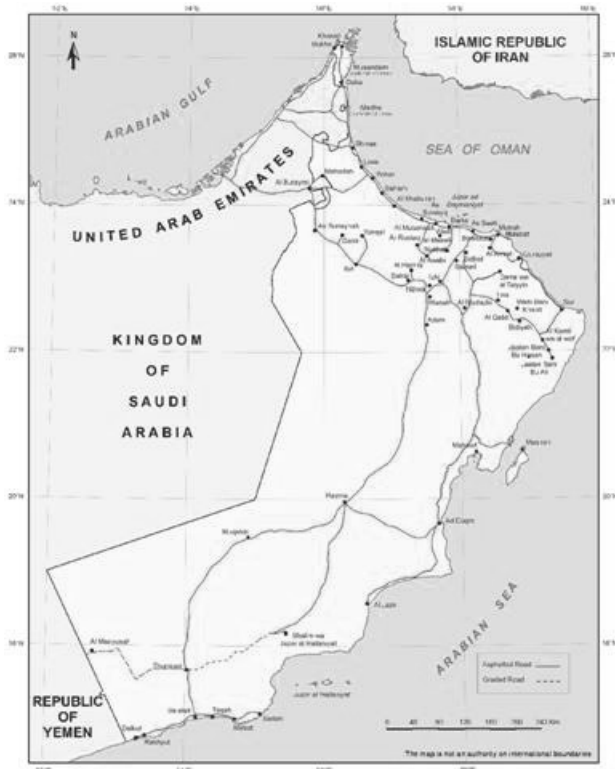
1. Introduction

The Sultanate of Oman located at the southern tip of the Arab Peninsula (*Figure 1*) has experienced tremendous transformations over the last decades. It developed from a static subsistence/oasis economy in the 1960s into a dynamic high-income economy with a nominal GDP per capita of US\$ 18,876 in 2009. The enabling force behind this remarkable trajectory was the discovery and extraction of oil since the late 1960s which happened relatively late as compared to other Gulf countries. At the turn of the millennium Oman's oil production had reached its preliminary peak and declined until 2008 before new enhanced oil recovery techniques and investments reversed this trend (temporarily). Despite this reduction over much of the last decade the Omani economy performed well when compared with the EU-27 or Austria. In real terms the latter two grew by modestly 1.7% annually between 2000 and 2010 while Oman's economy grew by 4.6% on average (IMF 2011). Given the declining oil production oil exports have been gradually replaced as

engine of growth by increased local demand that has been largely driven by public spending on physical and social infrastructure. In particular the latter projects are often labour-intensive and, hence, they created a huge amount of jobs in the Omani economy. Between 2000 and 2010 employment more than doubled and increased alongside the expansion of the economy from around 660.000 in 2000 to almost 1.3 million persons employed (SoO 2011).

The Omani economy remains characterized by a strong importance of the hydrocarbon sector, including oil and gas production, which accounted for 80% of total export earnings, 80% of government revenues and 46% of GDP in 2010 (CBO 2011). Alongside the hydrocarbon sector other sectors have emerged since the 1980s (World Bank 1988; 1994). Within the industrial sector other resource-based sectors such as copper and cement were promoted and some forward linkages in the oil and gas sectors were established (oil-refineries and processing of gas into transportable liquefied natural gas). More recently, energy intensive manufacturing industries have been set up drawing on Oman's gas resources, including the production of plastics, fertilizer and aromatics as well as metal processing such as aluminium smelting and steel rolling. Last but not least the building and construction sector has augmented as in other Gulf States in view of increased public spending on infrastructure (e.g. roads, airports, ports, housing). Within the service sector tourism has grown in importance which is a reflection of the heightened efforts of the Omani government to target the tourism sector as a future driver of growth and provider of jobs.

The emergence of these industries has to be framed against the background of Oman's long term development strategy. The "Vision 2020" was officially launched in 1995 and aims to promote a structural change of the economy to reduce the dependency on the oil sector. Hence, economic diversification into industrial and service sectors lies at the heart of the agenda. In particular, the contribution of oil and gas to GDP should be reduced to 19% by 2020. In contrast, the industrial sector and particularly manufacturing industries should increase to 29%. Given Oman's relatively small oil and gas resources as compared to neighbouring Gulf States¹



Source: SoO, Ministry of Information (online, 2011)

Fig. 1. Map of Oman

¹ According to data from the BP Energy Review the Middle East region accounts for almost 55% of global oil and 40% of global gas reserves as of 2010. Saudi Arabia (19%), Iran (10%), Iraq (8%), Kuwait (7%) and United Arab Emirates (7%) account for the lion share of global oil reserves while Oman's share is estimated at 0.4%. Oman's share in global gas reserves is also relatively small accounting for 0.4% while Iran (16%) and Qatar (14%) account almost for one third of global gas reserves (BP 2011).

finding alternative sources of growth was recognized as key in sustaining economic and social progress. To promote this change the plan foresaw an important role for the private sector and enhanced co-operation between private and public sector. A third important pillar of the strategy was dedicated to the development of the local Omani labour force, in particular by upgrading their skills to meet the demands of the local labour market.

The focus on the Omani human resource development is in line with the long-term concern to integrate Omanis into the local labour force and provide enough jobs for them. This concern is related to the initial reliance on foreign workers during the 1970 and 80s due to a lack of qualified Omani nationals (ILO 2010). Hence, under the heading of “Omanisation” a specific set of (labour market) policies was first launched in 1988 to further the participation of Omani nationals in the labour market. This endeavour remains of crucial importance as an increasing number of Omani are entering the labour force. According to the 2010 population census around 48% of the Omani nationals are between 19 years and younger (SoO 2011). Even when taking into account that an important part of them will be channelled into the educational system for some time the challenges are huge. In view of this we are going to assess the developments and current state of the Omani labour market. Based on this assessment we will highlight some challenges that need to be addressed to improve labour market outcomes.

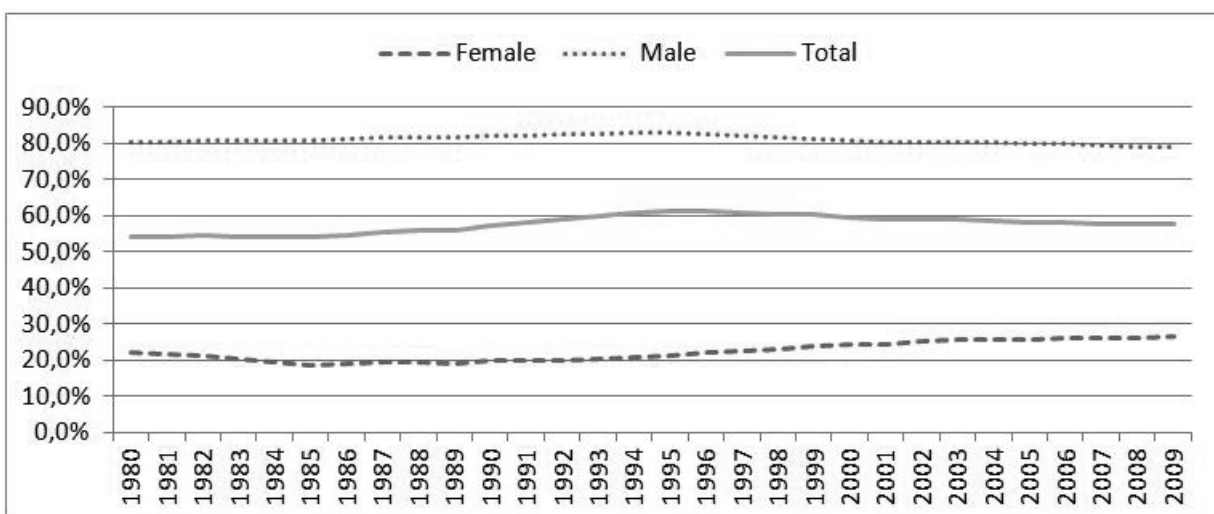
2. Patterns of the Omani labour market

Officially published data on labour market issues is scarce in the Gulf countries in general and Oman is no exception in this regard (Baldwin-Edwards 2011). Therefore, the following pages provide a broad-brush picture rather than a detailed account of the labour market developments and, hence, the current assessment needs to be taken with a grain of salt. Nevertheless, some important findings can be highlighted.

Data is used from the Oman Statistical Yearbook 2010 as well as from the International Labour Organization (ILO), particularly the “Key Indicators of the Labour Market” Database (KILM). The data is complemented by secondary sources from academia and international organizations.

2.1. Low labour force participation

The first interesting indicator is the labour force participation rate which gives a broad idea about the actual usage of the potential labour supply in one country. It is calculated as the share of the resident population aged between 15 and 64 years that is economically active. The economically active population - the labour force - includes both employed and unemployed as well as the armed forces but generally does not take into account workers in the informal sector. Since there is no national time series available for this indicator we draw on the international estimates from the ILO (see *Figure 2*). According to the ILO data the labour force participation was estimated at roughly 58% in 2009 which is an increase from the estimated 54% in 1980 but a bit lower than the 60% during the second half of the 1990s. A gendered view on participation rates reveals a very pronounced divergence between female and male participation. Labour force participation of men has slightly increased from around 80% in the early 1980s to roughly 83% in the mid-1990s before it started to decline to roughly 79% by 2009. By contrast women’s role in the Omani labour market is modest due to socio-cultural norms and tradition (Kapiszewski 2006; ILO 2010: 5). Women’s participation rate has decreased from around 22% in 1980 to 19% at the end of the 1980s from where it climbed again to around 26% in 2009. A comparison with Austria reveals marked differences. In 2009 the general labour force participation rate for Austria stood at 75% while the Omani rate was only 58%. Male participation in Oman (79%) is comparable with Austria (81%) while female participation in Austria (68%) is - despite being lower than the male rate - still way above the corresponding Omani rate (27%).



Source: ILO – KILM Database

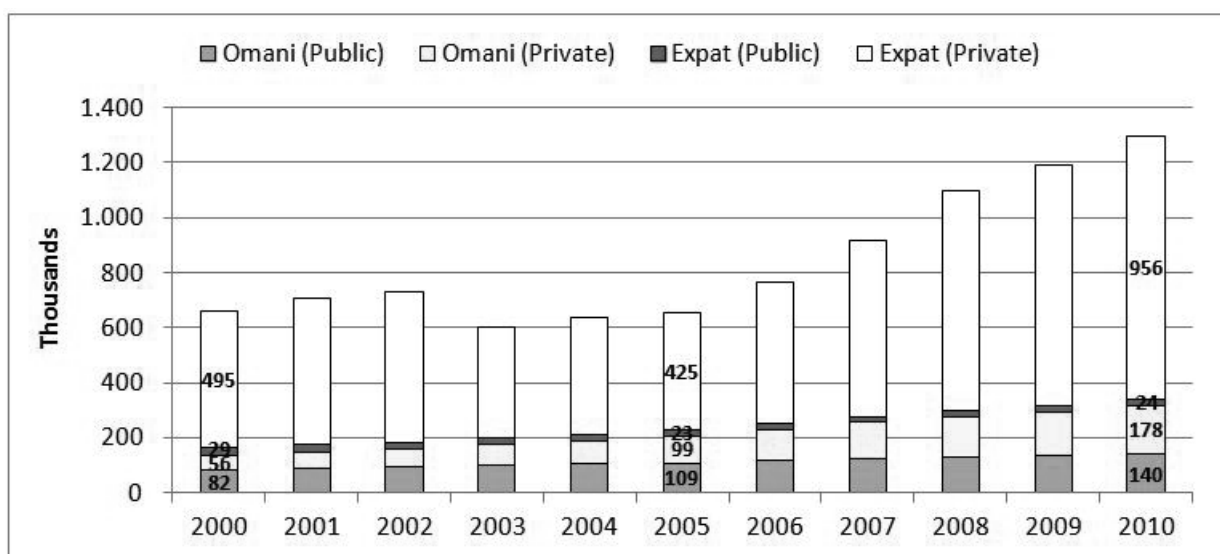
Fig. 2. Labour force participation in Oman (1980-2009)

The increase of women's participation, albeit from low levels, can be amongst others related to the efforts to gradually improve the position of women in the Omani society which has been a long-time aim and endeavour of the Sultanate, in particular of Sultan Qaboos bin Said. This agenda is amongst others reflected in a stronger visibility of women in public life (e.g. the nomination of female ministers (Kapiszewski 2006: 5)), and a stronger role of female education when compared to other Gulf countries (ILO 2010). Data from the national authorities suggest employment of Omani women has increased from 30,000 in 2000 to roughly 80,000 in 2009 with 30,000 jobs created in the public and around 20,000 created in the private sector (SoO 2011). The more pronounced increase in the public sector might be related to the generally more favourable terms and conditions of the public sector in comparison to the private sector (see below) which tend to make jobs in the former more socially acceptable (ILO 2011a: 8). Besides the increase of female Omani employment, employment of non-Omani women needs to be considered. The national data does not allow for comparison over time but extrapolating from the 10% female share of the total expatriate workforce in the private sector (in 2008 and 2009), we arrive at an estimated Non-Omani female employment of 50,000 in the private sector for 2000. This suggests an increase by roughly 37,000 to 87,000 in 2009 while the public sector employment of non-Omani women declined from 10,000 to 8,000 over the same period.

The ILO data on participation rates takes the resident population as basis for comparison, and hence, it includes Omani and Non-Omani nationals. Unfortunately, it does not allow for disaggregation between the two groups which would, however, be very important given the crucial role of foreign guest workers on the Omani labour market. We now turn to the analysis of their role in Oman based on employment data from the national authorities.

2.2. Dominance of foreign nationals on the labour market

As in other Gulf countries an important part of the Omani labour force is made up of foreign nationals. They have come to play a key role in the development of various economic sectors, including but not limited to the exploitation of natural resources, in the oil-rich Gulf States while the development of local human resources was initially sidelined (Baldwin-Edwards 2011). A key instrument in this regard was the Kafala, or sponsorship system, that was intended to control the influx of foreign workers and to ensure the rotation of a flexible labour force that can be adjusted to the economy's cycle. Under the Kafala system expatriates were considered as temporary 'guests' and used to be treated differently than the native workers e.g. having different rights. The work permit is generally tied to the sponsor and, hence, expatriate can only change employment if the sponsor agrees. Otherwise, workers have to leave the country - or work illegally. Given the labour abundance of neighbouring South Asian sending countries and the high asymmetries between the sponsor and the respective expatriate worker, this system has resulted in downward pressures on wages and working conditions of un- and semiskilled workers. In recent years, some GCC countries have altered the system as they recognized its limits and problems (ILO 2011b; Baldwin-Edwards 2011). The UAE has undertaken several improvements since 2007, including compulsory electronic bank payments of wages and compulsory health insurance for all workers. Bahrain initially announced in 2007 to abolish the system but finally held on to it and introduced minor changes, including the change of employment without the permission of the employer-sponsor (except for the domestic service sector). Kuwait announced to abolish the system in early 2011 but again domestic service workers have been excluded from the reform. It was also reported that Oman would advance some reforms in the context of the ILO "Decent Work Country Programme" addressing the situation



Source: SoO 2011

Fig. 3. Employment in the public and private sector by nationality (2000-2010)

of domestic service workers (ILO 2010).

In 1975 expatriates only represented 34% of the total labour force, or roughly 71,000 people in Oman (Baldwin-Edwards 2011). Over the decades their presence has, however, increased significantly, and they represented more than 79% (or 524,000 workers) of total employment in 2000 (see *Figure 3*). In particular since the mid-2000s the number of expatriate workers has increased even further: from roughly 533,000 in 2006 to 897,000 in 2009. Hence, they represent almost three quarters of total persons employed in the public and private sector. Qatar (94%), UAE (85%), Kuwait (83%) and Bahrain (77%) had even higher shares of foreign workers and only Saudi Arabia (51%) can be considered an outlier in this regard (Baldwin-Edwards 2011).

Official data on the role of foreign nationals in the labour market is likely to underestimate their presence (Baldwin-Edwards 2011: 49). A key reason is that many of the expatriate workers are not 'temporary' guest workers - say for two years - as envisioned by the labour and immigration policies and reflected in their contracts but have become 'de facto' permanent residents. From the employer's perspective this reduces cost as the need for training and registration of new workers is reduced. As a result employers prefer to hold on to their workers. Similarly, workers are - deliberately or not - non-compliant with labour and immigration laws. "*As a result, the average period of time that foreign workers spend in the GCC countries continues to extend, and the number of 'almost permanent' foreign workers has increased, albeit not formally*" (Kapiszewski 2006: 4). Given the nature of this phenomenon, it is not surprising that more systematic data is hard to come by.

The majority of expatriate workers in the private sector - which employs around 85% of expatriate workers - migrates from South Asian countries (see *Table 1*). In 2009 Indian nationals accounted for 56% (489,000 workers), Bangladeshi for 18% (156,000 workers), and Pakistani workers for 14%

(121,000 workers) of the total private sector expatriate workforce. The overwhelming majority of these workers is male accounting for 90% in 2009. As regards the remaining 10% female workers they are predominately from Asian countries, including India, Philippines and Sri Lanka, which is also in line with migrant worker patterns in other GCC countries (Kapiszewski 2006: 6). In the public sector, the main countries of origin are India and Egypt and to some extent other Arab countries, except for the GCC states (SoO 2011).

The skill profile of the expatriate workforce in the private sector is dominated by workers with limited skills (ILO 2010; SoO 2011). In 2009 they accounted for 41% of the total expat workforce while 21% were considered vocational/occupational labour, 22% skilled, 10% specialist/professional, 6% technical labour. This is in line with results from a recent joint study of the Arab Labour Organization and the International Migration Organization which highlights that with the exception of Qatar all GCC countries do have expatriate workers with low or no education levels. According to this study Oman has actually the highest share of illiterate migrant workers (21%) and also a high share of workers who only dispose of basic read and write skills (31%). If these two categories are taken together Oman is showing the highest proportion (52%) of migrant workers which are barely educated among the Gulf States² (cf. *Figure 4*).

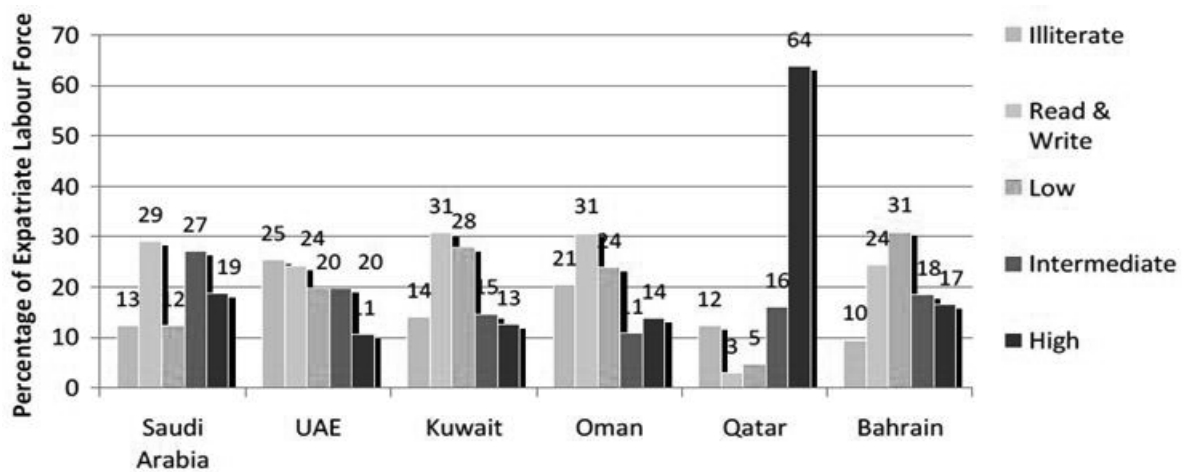
When looking at the labour market from a sectoral perspective the concentration of employment in specific sector is obvious. Like in other GCC countries most employment is concentrated in the labour-intensive construction sector

2 The national data on educational level of expatriate workers in the Omani private sector (2009) also suggests a similar high share of workers who can only read and write (35%). However, the group of illiterate workers does not even account for 1% in this data suggesting that there are more or less no illiterate expatriate workers in Oman (SoO 2011).

Table 1. Expatriate Workers in the private sector, by country of origin and gender (2008-2009)

	2008					2009				
	Male	Female	Female %	Total	% of Total	Male	Female	Female %	Total	% of Total
Indians	436.356	29.832	6,4%	466.188	58,6%	457.916	31.443	6,4%	489.359	56,0%
Bangladeshi	123.049	2.276	1,8%	125.325	15,8%	153.841	2.439	1,6%	156.280	17,9%
Pakistani	105.780	258	0,2%	106.038	13,3%	121.125	291	0,2%	121.416	13,9%
Sri Lankans	4.089	5.192	55,9%	9.281	1,2%	4.354	5.858	57,4%	10.212	1,2%
Philipinos	5.824	9.910	63,0%	15.734	2,0%	5.594	11.255	66,8%	16.849	1,9%
Egyptians	9.936	907	8,4%	10.843	1,4%	10.725	975	8,3%	11.700	1,3%
Other Nationalities	31.597	29.929	48,6%	61.526	7,7%	33.186	35.243	51,5%	68.429	7,8%
Total	716.631	78.304	9,9%	794.935	100%	786.741	87.504	10,0%	874.245	100%

Source: SoO 2011



Source: Hassan 2010: 65

Fig. 4. Foreign workers in GCC countries by education levels (latest available years)

Table 2. Expatriate workers in the private sector, by gender and economic activity (2009)

Economic Activity (ISIC 3.1)	Total	Sectoral %	Male	Female	Female %
Agriculture and Fishing	68.134	7,80%	67.936	198	0,30%
Mining and Quarrying	12.486	1,40%	11.797	689	5,50%
Manufacturing	94.143	10,80%	93.542	601	0,60%
Electricity, Gas & Water Connections	765	0,10%	741	24	3,10%
Construction	341.357	39,00%	340.341	1.016	0,30%
Whole Sale, Retail Trade and Car Repairs	124.268	14,20%	121.574	2.694	2,20%
Hotels & Restaurants	51.052	5,80%	49.335	1.717	3,40%
Transport, Storage & Communication	16.900	1,90%	15.575	1.325	7,80%
Financial Intermediaries	3.112	0,40%	2.716	396	12,70%
Real Estate, Renting & Business Activities	33.479	3,80%	31.784	1.695	5,10%
Education	7.750	0,90%	4.056	3.694	47,70%
Health & Social Work	4.021	0,50%	1.944	2.077	51,70%
Community & Personal Services	21.284	2,40%	19.478	1.806	8,50%
Private Household with Employed Persons	94.592	10,80%	25.336	69.256	73,20%
Extra Territorial Organization & Bodies	833	0,10%	532	301	36,10%
More Than One Activity	69	0,00%	54	15	21,70%
Total	874.245	100%	786.741	87.504	10,00%

Source: SoO 2011

as well as in specific service sectors (SoO 2011; Baldwin-Edwards 2011)³. A view on the composition of the expatriate

3 With regard to the agriculture and fishing sector one needs to highlight that despite their relative small contribution to GDP, they remain an important source of income and employment. While relative importance has decreased over the long-term as other sectors of the economy have emerged they still play an important role in the informal economy. For instance, according to the national agriculture survey around 155,000 Omanis are working on holdings that produce for own consumption primarily (MoAF 2005).

workforce in the private sector reveals that 39% of the total expatriate private sector workforce is employed in the construction sector in 2009 (see Table 2). Service jobs in the “whole sale, retail trade and car repairs” accounted for 14.2% in 2009 followed by domestic service workers (10.8%) and manufacturing (10.8%) as well as “hotels & restaurant” which accounted for 5.8% in the same year. A gender-disaggregated analysis highlights that female migrant workers almost exclusively work in the domestic service

sector accounting for almost 70,000 out of a total of roughly 88,000 female migrant workers. Other important sectors, in particular relative to the female migrant component are “health & social work” (51.7%) and “education” (47.7%). In contrast, manufacturing and construction but also agriculture and fishing are an exclusive male domain.

2.3. Rising unemployment, in particular among young people

As shown above in *Figure 3* the strong increase in employment over the last decade, particularly since the mid-2000s, has been largely due to an increase of foreign workers that were needed in the private sector development. Notwithstanding the pronounced influx of foreign workers total employment of Omani nationals also rose importantly from 138,000 to 318,000 over the same period. However, this increase was not sufficient to ease the increasing pressures resulting from a growing number of native young job seekers. As more and more young people have entered the labour force and as the public sector has been unable to absorb them, open unemployment rates have increased (Baldwin-Edwards 2011). Although complete time series are missing in this regard, this increase is reflected in data from the Arab Labour Organization (ALO) and the ILO. In 2005 they suggest a total unemployment rate of 7% and a significantly higher rate of 19.6% for youth unemployment for Oman (Chaaban 2010: 21). More recent estimates from 2010 suggest an unemployment rate of around 15% for the total population and around one-third among the age group 15-24 highlighting the particular challenge to create decent employment opportunities for the young Omani population (ILO 2010).

As mentioned in the introduction Oman has addressed the need to provide sufficient jobs to its native population relatively early with its ‘Omanisation’ policy established in 1988 (ILO 2010). Like other GCC countries the prime goal was to increase the share of Omani nationals in the total labour force. Efforts accelerated during the 1990s with several measures introduced, including national quotas for specific professions/sectors and the exclusion of expatriate workers from certain occupations. Other measures included raising the cost of hiring foreign workers (e.g. via additional taxation), offering preferential treatment of quota-fulfilling firms for public procurement and deporting irregular migrants. In addition, efforts have been undertaken to channel new entrants in the labour market towards the private sector

and to simultaneously promote vocational trainings and the study of technical subjects with the aim to raise the skill level of Omanis (Baldwin-Edwards 2011). However, results have been mixed as Omanisation was largely confined to the public sector, thus far. As highlighted above the absolute number of Omani employed in the private sector also increased but given the particular strong influx of expat workers since the mid-2000s the relative importance diminished. Currently Omanisation quotas are in place in six areas of the private sector: transport, storage and communications (60%); finance, insurance and real estate (45%), industry (35%), hotels and restaurants (30%), wholesale or retail trading (20%); and contracting (15%) (ILO 2010: 4).

Before turning to the challenges in the next section *Table 3* briefly highlights the segmentation along several dimensions of the Omani labour market. First, Omanis account for barely 25% of total persons employed while three out of four people employed in Oman are expatriate workers. Second, Omani nationals are heavily concentrated in the public sector, accounting for more than 85% of public sector employment. While this is indeed a result and success of Omanisation policies the picture is actually reversed for the private sector. Although the absolute number of Omanis employed in the private sector has increased their share in total private sector employment has decreased to barely 15% given the significantly stronger increase of the expatriate workforce over the same period. A third important line of separation is related to gender. Women workers, including Omani and foreign nationals, just make up 15% of total employment.

3. Overcoming a segmented labour market

In view of the above described patterns there are several challenges ahead that need to be addressed to overcome this segmentation with a view to provide employment opportunities for Omani nationals in the private sector.

First, and foremost, the gap between the public and private sector must be reduced. Traditionally, the public sector used to be the preferred employer for Omani nationals. It was particularly perceived as providing better earnings and working conditions and on top of that pension benefits (ILO 2010). However, this role of ‘employer of last resort’ is increasingly becoming a problem given Oman’s declining natural resources which are crucial to the government’s budget. Closing the gap between the public and private sector involves in particular raising the standards in the private

Table 3. Employment in the public and private sector by gender and nationality (2009)

	Public			Private		
	Male	Female	Total (nationality)	Male	Female	Total (nationality)
Omani	86.387	50.235	136.622	129.042	29.273	158.315
Expat	15.205	7.711	22.916	786.741	87.504	874.245
Total (gender)	101.592	57.946	159.538	915.783	116.777	1.032.560

Source: SoO 2011

sector so as to offer more jobs with attractive conditions. In this regard the establishment of the Oman “Decent Work Country Programme” in 2010 is a very positive step as it aims to promote decent working conditions based on international agreed labour standards. A linchpin to meet this target is the reform the sponsorship system. Thus far, it contributed to a problematic reliance on cheap and flexible workers and provided limited incentive to upgrade activities and increase productivity as abundant cheap labour supply existed. In its current form it tends to put downward pressures on wages and working conditions in the private sector thereby increasing the gap between public and private sector. As highlighted in the Country Programme “*the vast majority of foreign workers, especially women domestic workers, are hired through personal contacts. Little information is available on the types of contracts negotiated through formal private employment agencies, or whether the employer adheres to the contractual clauses. The processing fees demanded by recruitment agencies are very high relative to what the prospective migrant would earn. The means of recruitment of this category is blurred, and it is not clear whether migrant workers and women migrant domestic workers are treated equally*” (ILO 2010: 2). Hence, besides reforming the labour migration system strengthening the implementation of labour laws in Oman remains crucial. The recent establishment of the Oman General Federation of Trade Unions as well as the increased efforts to strengthen labour administration in Oman are encouraging signals in this regard. A last important issue is related to the extension of social security coverage to the private sector which would help to raise the profile of private sector employment among Omani nationals.

Second, the employability of the Omani workforce must be further increased as to reduce the skill mismatch in the private sector. The success of Oman’s development trajectory was recently acknowledged by the United Nations Development Programme. In its 20th anniversary edition of the Human Development Report it compared 169 nations in terms of the progress made in human development from 1970 to 2010 (UNDP 2010). Oman topped the list, in particular due to its achievement in health and education. In the area of education Oman has not only established basic educational institutions but also a variety of technical and vocational schools over the last decade that are deemed important in providing specific skills needed by the private sector. However, the system of technical and vocational training system in Oman faces several challenges, in particular when it comes to flexibility, innovation and adaptation to change (ILO 2010: 15). Also, the number of students in sciences and technology tends to be modest while enrolment in social sciences and humanities is high (World Bank 2008). This pattern of enrolment is historically consistent with a policy of absorbing most university graduates into the public sector, but is questionable for a strategy that draws on private initiatives and dynamic manufacturing and service sectors. A final point is the issue of ‘work ethics’ where anecdotal evidence suggests that some Omani’s are not willing to meet the required standards of the private sector which is reflected in absences or refusal to carry out tasks (Baldwin-Edwards 2011).

Third, the role of women in the labour market must be strengthened. Over the last decades women’s role in Omani

society has gradually increased as highlighted above. With regard to labour market participation the available data suggests a slight improvement over the last decade as well. However, despite these improvements women do still face important barriers to entry to labour markets, most notably due to socio-cultural norms. The good news is that these are increasingly addressed, in particular in the context of the National Strategy for Advancement of Omani Women (2007-2020). The strategy aims to “*promote full participation and involvement of women in economic and social development process, expand the representation of women in decision-making (...) and review legislation to ensure equal rights between men and women with the view to eliminating all forms of discrimination against women*” (ILO 2010: 5). A case in point is the situation of women migrant workers, in particular the large majority which is working in private households. They are most vulnerable to exploitative practices, in particular since they are not covered under the labour law (ILO 2010).

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