



# Diverging Paths

## The Impacts of COVID-19 on Migration in the Middle East and North Africa

By Samuel Davidoff-Gore

INTERNATIONAL PROGRAM

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**Migration Policy Institute**

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## Executive Summary

The COVID-19 pandemic disrupted efforts to manage migration and displacement into, within, and out of the Middle East and North Africa. In many ways, the pandemic threatened to unravel the already fragile system of migration management in the region, a system characterized by lax enforcement of policies against irregular migration, weak intergovernmental cooperation, heavy reliance on migrant labor, and a ceding of migration policymaking around the Mediterranean to European interests. At the same time, the crisis highlighted a crucial split in governments' ability to respond to changing mobility trends between the higher-income Arab Gulf states and the rest of the region, particularly lower-income countries dealing with profound economic and political instability. In the long run, the pandemic has been less of a disruptor of existing trends, instead reinforcing and accelerating them. The Gulf has continued its economic shift away from petrowealth and toward more diversified economies intended to depend less on migrant workers, and North Africa and Lebanon have become increasingly unstable. These trends directly affect which states have been able to recover the quickest to pre-pandemic levels of mobility and migration.

The shutdown of mobility at the start of the pandemic had drastic effects on movement throughout the region. Migrant workers comprise much of the workforce in the Gulf, Jordan, and Lebanon, and many lost their jobs or stopped receiving wages while also being excluded from social protection programs. Because they were legally unable to stay without their employer's sponsorship, many migrant workers lacked a legal basis or economic means to stay in the country; however, at least at first, they also had no way to leave. Meanwhile, tourism and travel, which represent about 10 percent of most countries' gross domestic product (GDP) in the region, largely halted. And border closures stranded irregular migrants along many major migration routes, especially those from sub-Saharan Africa.

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As the pandemic continued, the region saw major shifts in traditional migration patterns. Countries of origin in other parts of the world began organizing repatriation flights for their nationals that, while taking time to get up to speed, dramatically reversed the trend of labor migration *moving to* the region and shifted to labor migrants *leaving* the region.

Similarly, migrants traveling irregularly to Yemen and then Saudi Arabia began returning to the Horn of Africa, repeating their dangerous sea voyage in reverse across the Red Sea or Gulf of Aden. Meanwhile, worsening socioeconomic and political conditions in the rest of the Middle East and North Africa triggered new forms of large-scale displacement and irregular migration. North African countries, which were previously primarily transit points for sub-Saharan Africans leaving for Europe, became countries of origin as many of their nationals attempted the perilous journey as well.

As the region opened further, the trends diverged—in some cases, mobility resumed its pre-pandemic directions and, to a certain extent, volumes, but in other cases, the pandemic-induced changes appear to be lasting. The Gulf states were able to use mobility measures to facilitate the resumption of labor migration to the subregion and restart tourism and travel ahead of several large-scale events such as Expo 2020 in Dubai

and the 2022 FIFA World Cup in Qatar. Spontaneous migration to Saudi Arabia from the Horn of Africa also largely returned to its pre-pandemic contours. But the situation in North Africa and Lebanon worsened, and it is unclear whether and when the number of departing nationals will return to pre-pandemic levels.

In addition to affecting mobility patterns in the region, the pandemic also influenced and intersected with ongoing changes to migration and mobility management, particularly in the Gulf. The pandemic forced Gulf states to reckon with their almost complete reliance on migrant workers to keep their economies afloat, bolstering arguments for increasing the labor force participation of nationals in the private sector. At the same time, the mass departure of migrant workers facilitated much-needed initial reforms to labor rights and migrant protections in the region. These policies are still incipient, but they are promising signs that COVID-19, as well as increased public attention to migrant exploitation during the World Cup in Qatar and continued advocacy, has shifted momentum behind reforming labor migration policies. Meanwhile, the region's drive to grow its tourism sector and host large-scale events has increased following adjustments countries made to successfully host megaevents even during a public-health emergency. These shifts could have lasting impacts for mobility more broadly.

Ultimately, the pandemic has highlighted the diverging paths of different countries in the region. The higher-income, more politically stable countries can actively engage in migration management policy, while others are stuck in a series of compounding crises. Although widespread reform is unlikely, the pandemic has raised opportunities to reshape labor markets, enhance the rights of migrant workers, and make tourism and travel more resilient in the face of public-health crises. But the economic and governance issues in the rest of the region mean that moving forward in a coordinated fashion on migration and mobility policy is unlikely to occur any time soon.

## 1 Introduction

The COVID-19 pandemic has had profound implications for mobility across the globe, and that is certainly the case for the countries that comprise the Middle East and North Africa (MENA) region.<sup>1</sup> In a region home to various extremes of movement and migration—ranging from the Arab Gulf states' exceptionally high reliance on migrant workers, to North Africa serving as the primary departure point for migrants attempting to reach Europe, to Turkey and the Levant hosting millions of Syrian refugees—the pandemic was a shock to the system. It led to some of the world's largest and most sustained repatriation efforts for stranded migrants, halted and reversed ongoing irregular journeys, and left the most vulnerable people on the move in even more precarious positions.

While the pandemic may ultimately have acted as a watershed moment for migration policy in parts of the region, in others, it seems to have only compounded migration-related challenges. The pandemic forced Gulf states to reckon with their heavy reliance on migrant workers to keep their economies afloat, facilitating much needed but still insufficient reforms to labor rights and migrant protections in the region. And as many of the members of the Gulf Cooperation Council (GCC) are in the middle of economic

<sup>1</sup> For the purpose of this report, the Middle East and North Africa (MENA) region refers to the following countries: the six Gulf Cooperation Council (GCC) Member States (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates), Algeria, Djibouti, Egypt, Iran, Iraq, Israel, Jordan, Lebanon, Libya, Mauritania, Morocco, Sudan, Syria, Tunisia, Turkey, and Yemen.

diversification efforts, moving away from relying solely on the energy industry to a wider variety of economic sectors and policies to decrease the public sector bloat, they had to make mobility systems work in new ways to maintain progress toward these efforts. At the same time, the pandemic has exacerbated ongoing economic and political crises throughout the region, prompting new or increased outflows of Algerians, Egyptians, Lebanese, and Tunisians and shifting the routes migrants have taken, particularly in Morocco and Tunisia. This divergence in the challenges faced and the ability to use mobility policy to respond is emblematic of the wider disparity between the Gulf and the rest of the region in how countries were able to weather the pandemic.<sup>2</sup>

Given the pandemic's unprecedented shock to mobility and border regimes across the globe, the Migration Policy Institute's Task Force on Mobility and Borders during and after COVID-19 is exploring opportunities to improve international coordination regarding border management during this public-health crisis and looking ahead to future emergencies. This report is part of a series of regional case studies that cover Asia and the Pacific, Europe, the Middle East and North Africa, and South America. Each offers in-depth analysis of regional trends and policy developments.

For the Middle East and North Africa, understanding how the pandemic has reshaped or reinforced trends and instigated new policies can lead to a better understanding of the next steps for building more robust and cohesive mobility management systems across the diverse region. This report provides an overview of key mobility trends in the region throughout the pandemic and how government responses shaped them. It then looks at how the pandemic affected ongoing policy developments and what they mean for the region, and provides recommendations of areas to watch.

## 2 The Pandemic and Mobility Trends

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The pandemic and the response to it led to vast changes in the volume, direction, and composition of migration to, from, and through the MENA region. Lockdowns and border restrictions in the first months of the pandemic stopped almost all movement. By the end of March 2020, at least 16 of 22 countries in the region had near blanket entry bans.<sup>3</sup> As time went on, countries built systems of travel restrictions that barred entry for travelers coming in from certain countries, health measures that allowed entry under certain conditions (such as testing or vaccination requirements), and exemptions, which allowed different categories of travelers to move depending on national priorities (such as nationals and residents, children below a certain age, and students or workers). These policies were not coordinated across countries; rather, governments largely made decisions on their own.

MENA countries generally took one of two approaches. The six Member States of the Gulf Cooperation Council (GCC)—Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates—primarily used entry restrictions to manage travel throughout much of the pandemic, although they also used exceptions

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2 United Nations Development Program (UNDP), *Arab Human Development Report 2022: Expanding Opportunities for an Inclusive and Resilient Recovery in the Post-Covid Era* (New York: UNDP Regional Bureau for Arab States, 2022).

3 Author analysis of data presented in Meghan Benton, Jeanne Batalova, Samuel Davidoff-Gore, and Timo Schmidt, *COVID-19 and the State of Global Mobility in 2020* (Washington, DC, and Geneva: Migration Policy Institute and International Organization for Migration, 2021).

to keep certain forms of movement going, allowing travelers to enter if they fulfilled specific criteria and health requirements.<sup>4</sup> It is unclear why GCC countries took this specific approach: the reliance on entry restrictions is similar to the approach taken by Israel, EU Member States for travel from outside the bloc, and countries in Asia and the Pacific that took strong eradication approaches to the virus.<sup>5</sup> However, there is little evidence that Gulf states intended to use border policy to achieve the goal of eliminating the virus within their territory.

By contrast, other governments in the region quickly shifted away from using restrictions and toward using health requirements such as asking travelers to provide proof of a negative COVID-19 test or to quarantine.<sup>6</sup> The shift occurred around August 2020 as the economic effects of the pandemic worsened and scientific understanding of how to mitigate the virus's spread grew. Under this system, all travelers could enter if they met certain requirements depending on their country of origin's epidemiological situation. In practice, however, meeting these requirements proved costly for travelers, especially quarantine requirements.<sup>7</sup>

*The differences seem more related to the ability and desire of countries to revive cross-border movement.*

These policies had dramatic impacts on short-term mobility trends in the region. But it is less clear whether and how the two different approaches (restricting entry for certain countries with wide exceptions versus imposing health requirements for

all travelers) affected migration in practice. Although the cost of health measures to the traveler might have hindered the resumption of mobility, this would not account for such a wide variation in trends. Instead, the differences seem more related to the ability and desire of countries to revive cross-border movement: those with the financial and technical resources to facilitate and incentivize mobility and with the government capacity to develop new policies in response to changes throughout the pandemic returned to pre-pandemic norms more quickly. Those without the resources or capacity instead took the slow path to resumption, with the challenges to reviving mobility compounding over time.

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- 4 The Gulf's exceptions meant that governments could implement country-specific health requirements that could potentially limit travel. In September 2021, the United Arab Emirates required travelers from a number of countries (including India, Nepal, Pakistan, and Sri Lanka) to test three times before entering the country. In addition to a polymerase chain reaction (PCR) test taken within 48 hours, travelers were required to take a rapid PCR test at the airport prior to departure and another PCR test upon arrival. The government never gave a clear reason for this testing regimen, and the increase in the number of tests raised the financial and bureaucratic costs of traveling. See, for example, Petlee Peter, "Double-Test Norm Troubles Passengers Heading to UAE," *The Times of India*, November 28, 2021.
- 5 Meghan Benton et al., *COVID-19 and the State of Global Mobility in 2021* (Washington, DC, and Geneva: Migration Policy Institute and International Organization for Migration, 2022); Lawrence Huang, *Mobility Shutdown: The Impacts of COVID-19 on Migration in Asia and the Pacific* (Washington, DC: Migration Policy Institute, 2024); Steven Scheer, "Israel Reopens Borders to Small Groups of Foreign Tourists," Reuters, May 23, 2021; Times of Israel Staff, "Who Can Travel to Israel and How, as Country Reopens to Visitors on Sunday," *Times of Israel*, January 8, 2022; Jonathan Lis, "Israel to Let Unvaccinated Tourists in as More COVID Restrictions Loosened," *Haaretz*, February 20, 2022.
- 6 This trend toward health requirements was present in much of North Africa and the Levant, but Turkey took this a step further by using only entry restrictions for the first few months of the pandemic and imposing them only on certain countries. Turkey also stopped mandating quarantines upon arrival comparatively early (in July 2020) and instead relied almost entirely on health screenings as its primary travel requirement. This relaxed posture is emblematic of the Turkish government's approach to show that the country was open and that the pandemic was not an issue. But this relied partly on undercounting COVID-19 cases and deaths, with later waves of infection having devastating impacts on the country. See Melis G. Laebens and Aykut Öztürk, "The Erdoğan Government's Response to the COVID-19 Pandemic: Performance and Actuality in an Authoritarian Context," *Government and Opposition* (2022): 1–18; Adnan Kisa, "Turkey's COVID-19 Strategy: 'The West Is Jealous of Us,'" *Journal of Public Health Policy* 42, no. 4 (2021): 612–21.
- 7 Benton et al., *COVID-19 and the State of Global Mobility in 2021*.

The pandemic's impacts varied not only across different countries but also across different types of migrants and travelers. The following subsections examine these differential impacts for people on the move in the region.

## A. *Repatriation of Migrant Workers*

The onset of the pandemic and swift border closures, domestic lockdowns, and the economic downturn that ensued left the MENA region's millions of migrant workers in even more precarious and vulnerable situations. Prior to the pandemic, Gulf states and their neighbors were estimated to have at least 23 million migrant workers, comprising the vast majority of private-sector workers in the GCC.<sup>8</sup> In particular, the Middle East is a key destination for migrants from South and Southeast Asia.<sup>9</sup> Many workers migrate regularly under sponsorship (kafala) programs, but some either arrive irregularly or overstay their visas.<sup>10</sup> Migrant workers in the region tend to live in poor conditions and are unable to leave without permission from their employers, who in some cases confiscate their passports. These rules also tie migrants' visas to their employers, meaning they lose their right to be in a country once their employment ends.

As economic activity shut down in the first months of the pandemic and oil prices tanked, migrant workers in the subregion often lost their jobs and were excluded from social safety nets. Governments in these countries prioritized supporting their nationals by implementing job protection and social safety net policies that excluded migrants. For example, Saudi Arabia announced in the early days of the pandemic that it would provide USD 2.4 billion in assistance for its citizens in the private sector but not for foreigners.<sup>11</sup> Migrant workers were left without income and, for many in low-skilled jobs, vulnerable to the swift spread of the virus because of their often crowded and unsanitary living conditions.

### BOX 1 The Kafala System

The kafala system is a system of labor migration that exists in some parts of the Middle East and North Africa, primarily the Gulf states, Jordan, and Lebanon. In this system, employers typically sponsor foreign workers to enter and work in a country and are responsible for arranging workers' travel and accommodations. The workers' visas are linked to their employers. These systems enable the states to bring in large numbers of low-paid workers, representing anywhere from 40 percent to more than 80 percent of the private-sector workforce. However, they have also long been criticized by human rights advocates and other observers for fostering exploitation, since workers rely on their employers for their legal right to stay in the country and have little judicial recourse when facing harsh work conditions, wage theft, and other rights violations.

Sources: International Labor Organization, "Labour Migration," accessed May 7, 2023; Kali Robinson, "What Is the Kafala System?," Council on Foreign Relations, November 18, 2022.

8 Omer Karasapan, "Pandemic Highlights the Vulnerability of Migrant Workers in the Middle East," Future Development (blog), Brookings Institution, September 17, 2020.

9 In 2019, more than 2.8 million workers traveled from South and Southeast Asia to GCC countries. See Jonathan Chaloff, Lauren Matherne, Pitchaya Sirivunnabood, and Yumi Saito, "Trends in Labor Migration in Asia," in *Labor Migration in Asia: COVID-19 Impacts, Challenges, and Policy Responses* (Tokyo, Bangkok, and Paris: Asian Development Bank Institute, International Labor Organization, and Organization for Economic Cooperation and Development, 2022).

10 Estimates of irregular migrants in GCC countries prior to the pandemic range from 6 to 12 million. See Nasra M. Shah and Lubna Alkazi, "COVID-19 and Threats to Irregular Migrants in Kuwait and the Gulf," *International Migration* 61, no. 2 (2023): 138–53.

11 Ben Hubbard, "Coronavirus Fears Terrify and Impoverish Migrants in the Persian Gulf," *The New York Times*, April 13, 2020.



*While migrants were stranded in many parts of the world during the first months of the pandemic, nearly 46 percent of them were in the MENA region.*

This was not the first economic crisis to lead to large-scale emigration from the region: migrants left the region en masse during the 2008–09 financial crisis and the 2014–15 drop in oil prices, many returning home.<sup>12</sup> But the strict travel restrictions and border closures implemented at the start of the pandemic kept many migrants from returning home, and

they had nowhere to go. Additionally, because so many migrant workers in the region were subject to the conditions of the kafala sponsorship system, they were especially vulnerable because they had few rights to stay if fired. While migrants were stranded in many parts of the world during the first months of the pandemic, nearly 46 percent of them were in the MENA region.<sup>13</sup>

The governments of both origin and destination countries had competing priorities in managing these returns. Countries of origin were initially hesitant to repatriate workers because they lacked the necessary health infrastructure for robust testing and quarantines, thus large-scale returns could pose a public-health risk. This was especially tricky for countries in South and Southeast Asia, which both sent many migrants to work in the MENA region and took particularly strict measures to prevent the spread of the virus. MENA countries of destination, meanwhile, did not want to be responsible for supporting the stranded migrants, and some Gulf states also saw this as an opportunity to rebalance their labor markets to lessen their reliance on foreign workers (see Section 3.B for more on economic nationalization campaigns).<sup>14</sup> As such, they attempted to either induce or incentivize countries of origin to start repatriation efforts. For example, the United Arab Emirates threatened to review labor relations with countries that did not repatriate their citizens, which induced Pakistan to begin repatriation registrations.<sup>15</sup> Kuwait, on the other hand, offered amnesty and arranged free flights for migrants present illegally in the country.<sup>16</sup> Some of these flights, for example those organized with Sri Lanka, were paid for jointly by the two governments.<sup>17</sup> But even though destination countries helped facilitate some testing, they generally did not prevent migrants infected with the coronavirus from boarding flights and spreading the virus to other passengers. For example, in the first months of repatriation flights, Pakistan routinely received flights from the United Arab Emirates in which 12 percent of passengers tested positive upon arrival, and the percentage jumped to 40 or 50 percent on several flights.<sup>18</sup>

12 Davide Barbuscia and Marwa Rashad, “What’s the Point of Staying?: Gulf Faces Expatriate Exodus,” Reuters, May 7, 2020.

13 As of July 13, 2020, the International Organization for Migration (IOM) estimated that 1,257,053 migrants were stranded in the MENA region. See IOM Return Task Force, “COVID-19 Impact on Stranded Migrants” (issue brief, September 30, 2020).

14 Irfan Ahmed Nazir, “COVID-19 and Migrant Workers in the GCC Countries: End of the Gulf Dream?” Project on Middle East Political Science, June 2022.

15 Al-Monitor, “Repatriation Flights Take Stranded Workers Home to Pakistan from UAE,” Al-Monitor, April 20, 2020.

16 Zvi Bar’el, “Foreign Workers, Rich and Poor, Sent Packing From Gulf States Over Coronavirus Crisis,” *Haaretz*, June 26, 2020.

17 Bilesha Weeraratne, “COVID-19 and Migrant Workers: The Economics of Repatriation,” Talking Economics, December 16, 2020.

18 Charlotte Greenfield and Alexander Cornwell, “Pakistan Concerned at Workers Returning from UAE with Coronavirus,” Reuters, May 5, 2020.

It is difficult to get a complete picture of the number of migrant workers who repatriated from the MENA region, and particularly Gulf countries, but these numbers exceeded 1 million. The largest operation, India's Vande Bharat Mission, started its first phase in May 2020 and repatriated more than 700,000 workers from the Gulf, including 330,000 from the United Arab Emirates and 138,000 from Saudi Arabia, by the end of December 2021.<sup>19</sup> For Nepal, of the more than 560,000 nationals repatriated, more than 360,000 were returning from just three countries: the United Arab Emirates, Qatar, and Saudi Arabia.<sup>20</sup>

Return and repatriation posed a set of tricky logistical challenges and high costs. In most cases, the countries of origin organized repatriation, with migrants going through consulates and embassies in the destination country. These repatriation flights were difficult to organize, especially because of strict travel restrictions in origin countries. For example, Nepal limited the number of repatriation flights per day because of the lack of sufficient health infrastructure upon arrival, and India conducted the Vande Bharat Mission in phases to avoid overwhelming health systems. While countries of origin paid for some repatriations,<sup>21</sup> in many cases, migrants had to cover the costs of their own flights (which often cost nearly as much as a round-trip ticket, despite being one-way)<sup>22</sup> and quarantine.<sup>23</sup>

Migrants paying for their own repatriation directly contradicted laws in some of the GCC Member States. In Qatar and Saudi Arabia, labor laws in place at the beginning of the pandemic mandated that employers or recruiters pay to repatriate migrant workers.<sup>24</sup> But these laws were enforced poorly during the pandemic. The United Arab Emirates implemented a similar law in 2021, which details employers' responsibility for repatriating migrant workers; however, it remains to be seen how strongly it will be enforced.<sup>25</sup> Finally, migrants were often victims of wage theft, both while they were stranded in the Middle East and after they returned home, leaving them often unable to pay for repatriation or with high debt burdens once they returned.<sup>26</sup>

19 *The Times of India*, "Over 7 Lakh Workers Returned from Six Gulf Countries under 'Vande Bharat Mission': Govt.," *The Times of India*, December 10, 2021. In addition, total repatriations from the Gulf (not just migrant workers) are estimated to have reached 2.88 million by the end of 2020. See Piyasiri Wickramasekara, "Return and Reintegration Challenges and Policy Responses in Asia Following the COVID-19 Pandemic," in *Labor Migration in Asia: COVID-19 Impacts, Challenges, and Policy Responses* (Tokyo, Bangkok, and Paris: Asian Development Bank Institute, International Labor Organization, and Organization for Economic Cooperation and Development, 2022).

20 Wickramasekara, "Return and Reintegration Challenges."

21 For example, Nepal funded some repatriations through its Foreign Employment Welfare Fund. See *Nepali Times*, "Too Many Stranded Nepalis, Not Enough Flights," *Nepali Times*, July 22, 2020.

22 Sam Kiley and Mostafa Salem, "Coronavirus Leaves the Gulf's Migrant Workers in Limbo, with No Income and No Easy Way Out," CNN, May 9, 2020.

23 Sameer Hashmi, "Coronavirus Leaves Gulf Migrant Workers Stranded," BBC, May 16, 2020.

24 DohaGuides, "Qatar Labour Law: Important Things to Know (2024)," updated January 16, 2024; Clyde & Co, "Employment and Labour Law in Saudi Arabia," Lexology, June 20, 2016.

25 Huda Tabrez, "UAE Labour Law: All You Need to Know about the Repatriation Ticket," *Gulf News*, July 29, 2022.

26 This issue predates the pandemic, but employers took advantage of the confusion and chaos surrounding initial pandemic shutdowns and subsequent repatriations to not pay wages. Because repatriated migrants do not have access to the Gulf states' judicial systems, they are unable to seek recourse for the theft and still often owe debts. See Amnesty International, "COVID-19 Makes Gulf Countries' Abuse of Migrant Workers Impossible to Ignore," Amnesty International, April 30, 2020; Sebastian Castelier, "Gulf Migrant Workers Face Crisis of Unpaid Wages amid Pandemic," *Al-Monitor*, August 10, 2020.

While repatriation efforts were still ongoing, labor migration to the MENA region picked up again as the Gulf states began to reopen to inbound travel in 2021 for migrants who were either vaccinated or paid for their own quarantine upon arrival. In India, for example, the number of emigration clearances granted (a proxy for the number of migrant workers going to the Gulf) neared pre-pandemic levels by December 2021 and stayed close to pre-pandemic levels throughout 2022.<sup>27</sup> In Pakistan, labor approvals exceeded pre-pandemic levels in 2022, and in Nepal, new labor approvals far exceeded pre-pandemic levels from July 2021 to July 2022.<sup>28</sup> Bangladeshi labor emigration had a similarly swift recovery, with total overseas employment in the GCC in 2021 exceeding 2019 levels.<sup>29</sup> Within the GCC, it appears that labor migration resumed most slowly to the United Arab Emirates and fastest among Indian and Pakistani workers traveling to Qatar and among Nepali workers headed to Saudi Arabia (see Figure 1). Resumption of migration along specific corridors has been contingent partly on labor market reforms and enhanced cooperation between countries of origin and destination (as will be discussed in Section 3.A); however, the overall recovery shows that the demand for and supply of labor migrants remains strong.

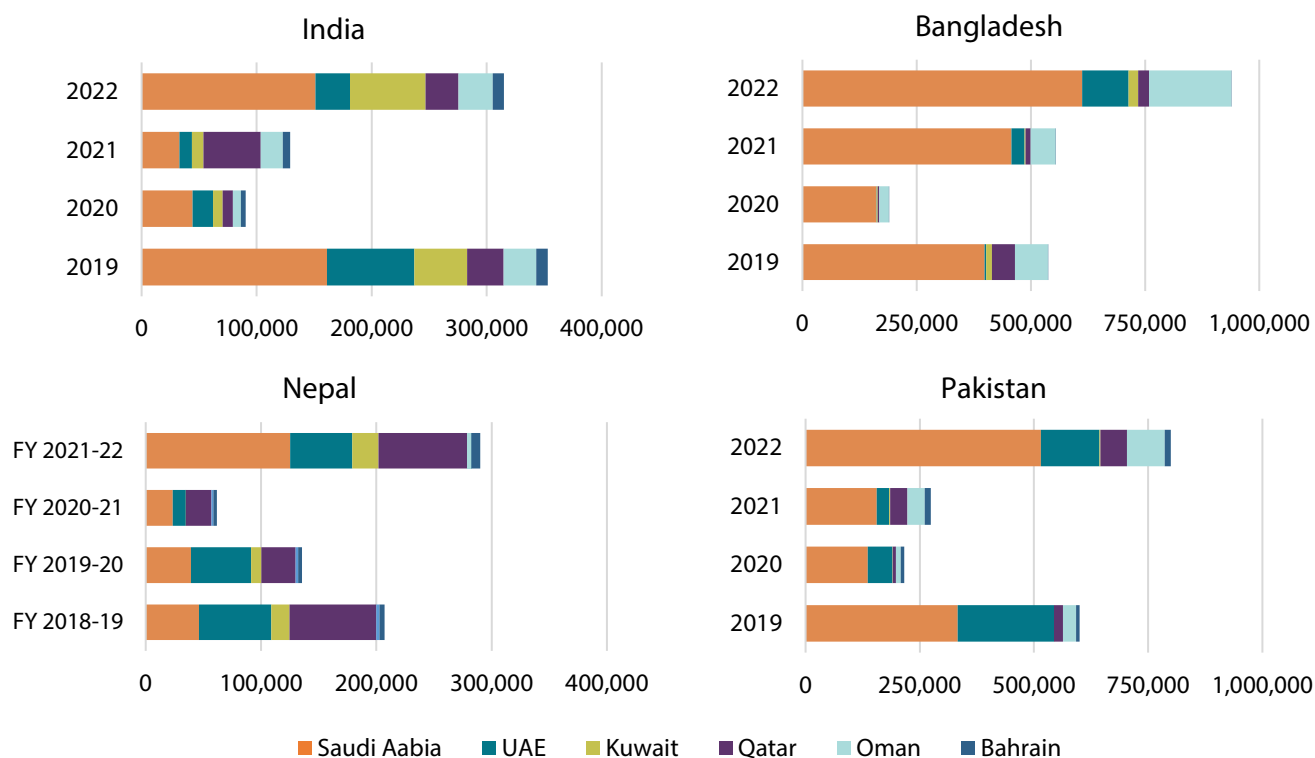
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*While repatriation efforts were still ongoing, labor migration to the MENA region picked up again.*

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- 27 Author analysis of India Ministry of External Affairs, Overseas Employment Division, “eMigrate—PoE-wise, Month-Wise Emigration Clearances (ECs) Obtained by RAs, PEs, and under Direct Recruitment by FEs,” accessed December 23, 2022. Lower-skilled migrants and migrant workers in certain professions are required to get immigration clearance for work in specified countries, including in the Gulf and Middle East. See Embassy of India, Riyadh, “FAQs on ECR and Non-ECR (ECNR),” accessed April 17, 2023.
- 28 Aiko Kikkawa, Raymond Gaspar, Kijin Kim, and Pitchaya Sirivunnabood, “COVID-19 and the Deployment of Labor Migrants from Asia: Lessons Learned and Ways Forward” (brief, Asian Development Bank, Manila, October 2022); author analysis of Pakistan Bureau of Emigration and Overseas Employment, “Statement Showing Number of Pakistani Workers Registered for Employment Abroad during the Period 1971–2023 (up to March) Country Wise,” accessed April 4, 2023; author analysis of Nepal Ministry of Labour, Employment and Social Security, Foreign Employment Department, “Annual Countrywise Labour Approval Reports,” accessed April 4, 2023.
- 29 Bangladesh Bureau of Manpower, Employment, and Training, “Overseas Employment and Remittances (2004 to 2024),” accessed April 14, 2023.

FIGURE 1

**Number of Nationals from Selected South Asian Nations Approved or Cleared to Work in GCC Countries, 2019–22**



Notes: The total numbers of migrant workers approved to work in the six GCC countries cannot be compared between countries of origin because of the different categories of workers that each country counts. In addition, Nepal reports annual statistics by fiscal year (FY), which runs from July 16 to July 15. Finally, the 2022 data for India do not include December 2022.

Sources: India Ministry of External Affairs, Overseas Employment Division, “eMigrate—Statewise, Countrywise Emigration Clearances (ECs) Obtained by RAs, PEs, and under Direct Recruitment by FEs,” accessed December 23, 2022; Pakistan Bureau of Emigration and Overseas Employment, “Statement Showing Number of Pakistani Workers Registered for Employment Abroad during the Period 1971–2023 (up to June) Country Wise,” accessed July 25, 2023; author analysis of Nepal Ministry of Labor, Employment, and Social Security, Foreign Employment Department, “Annual Countrywise Labour Approval Reports,” accessed April 4, 2023; Bangladesh Bureau of Manpower, Employment, and Training, “Overseas Employment and Remittances (1976 to 2023),” accessed April 14, 2023.

## B. Travel and Tourism

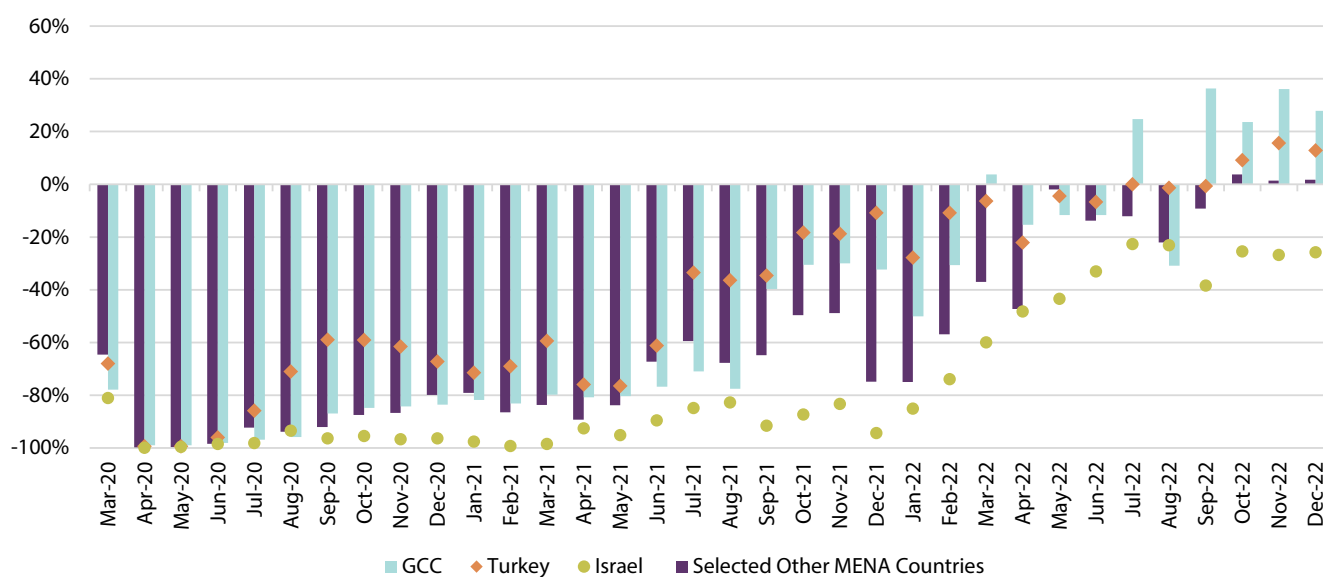
The pandemic had major implications for another crucial part of MENA economies as well: travel and tourism. In much of the region, tourism contributed close to or more than 10 percent of gross domestic product (GDP) in 2019, with Lebanon having the highest at 19.1 percent of GDP, followed by Jordan at 16.2 percent of GDP.<sup>30</sup> Tourism has been a historically important economic sector in some MENA countries such as Jordan, Lebanon, and Tunisia, while for the Gulf states, it is a growing part of their economic diversification agendas. Tourism also contributes to these countries’ foreign currency reserves, which is

30 Country-specific data from World Travel and Tourism Council, “Country/Region Data,” accessed February 13, 2023.

particularly important for countries such as Egypt, Lebanon, and Tunisia, whose relatively limited reserves have hindered their ability to pay for exports and resulted in currencies falling in value significantly.<sup>31</sup>

Shutting down travel during the pandemic had a devastating impact on the tourism and travel sectors of MENA economies. Tourism arrivals almost halted entirely in the pandemic’s first months and did not see a significant recovery until September 2021, when they were growing but still 51 percent below pre-pandemic levels. However, by mid-2022, tourism had generally returned to pre-pandemic levels (see Figure 2).

**FIGURE 2**  
**International Tourism Arrivals as a Percent Change from Pre-Pandemic Levels, Selected MENA Countries and Regions, 2020–22**



Notes: The percentages shown in this figure are calculated by taking the difference in the number of arrivals in a specific pandemic-era month from the same month in the year prior to the declaration of COVID-19 as a pandemic in March 2020 (i.e., March 2019 to February 2020), and then dividing that by the number for the corresponding pre-pandemic month. The decrease in tourism arrivals compared to pre-pandemic levels in the GCC in August 2022 is likely due to the fact that the annual Hajj pilgrimage took place in August in 2019 (the pre-pandemic comparison month) but in July in 2022. The statistics for the GCC do not include Kuwait because of a lack of published data. “Selected Other MENA countries” includes only Jordan, Morocco, Syria, and Tunisia because of inconsistent data availability. However, the trends depicted are corroborated by annual and semiannual statistics published by other non-GCC countries. Source: UN World Tourism Organization, “International Tourism and COVID-19,” accessed July 24, 2023.

Tourist sectors across the MENA region recovered quickest when countries coupled relatively light-touch travel restrictions with strong domestic vaccination rates and public-health measures. Tourism recovered quickest in Turkey (starting in August 2020) following the quick removal of quarantine requirements, the

31 For more on the importance of foreign currency reserves in these countries, see Khaled Dawoud, “Egyptian Government Walks Risky Economic Tightrope to Fulfill Its Loan Conditions to IMF,” Middle East Institute, February 9, 2023; Heba Saleh, “There Are No Dollars’: Foreign Currency Crunch Hits Egypt’s Economy,” *Financial Times*, January 1, 2023; Alex Irwin-Hunt, “Forex Crisis: Countries with the Largest Fall in Reserves since Covid-19,” FDI Intelligence, March 8, 2023; Heba Saleh, “Tunisia Stokes Fears of Economic Collapse after Rejecting IMF ‘Diktats,’” *Financial Times*, April 6, 2023.

continued under-reporting of COVID-19 cases, and a weak lira making travel much cheaper.<sup>32</sup> GCC countries followed, with recovery starting in earnest in September 2021. By contrast, other countries in the region took much longer to recover despite shifting away from travel restrictions earlier. This disparity is partly due to the medical requirements imposed on travelers by other countries in the region (particularly for quarantines), which were stricter and more costly than in the GCC.<sup>33</sup> At the other end of the spectrum, Israel's tourism recovered the slowest. The country had the strictest entry restrictions and medical requirements in the region, and its tourism levels only began to recover in February 2022 once restrictions were relaxed.<sup>34</sup>

The differences in entry restrictions, and the ability of Gulf states to reopen quicker, can be attributed partly to their vaccination strategies. Gulf states had the resources to acquire vaccines and the government capacity to administer them to their populations soon after they became available, helping mitigate the spread of COVID-19, while other MENA states did not.<sup>35</sup> This may have also made Gulf states more attractive to tourists, especially those seeking earlier access to vaccines.<sup>36</sup> However, Israel also invested heavily in vaccination but still did not loosen its travel restrictions, so the two are not always linked. High vaccination rates were helpful but not enough to restart mobility without governments lifting travel restrictions.

The composition of tourists has also changed for some countries from before the pandemic. Most notably, there has been a significant decrease in Russian and Ukrainian tourists to the region following Russia's invasion of Ukraine in 2022. This did not hurt tourism to Turkey, which maintained visa-free access for Russians, but it did hinder recovery in Israel and North Africa.<sup>37</sup> China's continued prohibition of outbound travel until January 2023 also affected the recovery of tourism in some MENA countries, as Chinese tourists could not travel abroad.

Finally, tourism recovered more quickly in some countries than others because of certain countries' decision to prioritize restarting the tourism industry. As will be discussed in Section 3.B, the Gulf hosted several large-scale events such as the Hajj and Expo 2020, for which governments prioritized facilitating tourist entry. Gulf states also invested heavily in maintaining their travel sectors, given the role the region plays as a global hub for travel.<sup>38</sup> By contrast, other states, such as Israel and Morocco, did not provide enough support to their domestic tourism sectors to stop the closure of travel-dependent businesses and significant job losses. Thus, as the pandemic subsided, the tourism industry was not robust enough to facilitate the same number of tourists.<sup>39</sup>

32 Ceyda Caglayan and Canan Sevgili, "Turkish Tourism Heats Up, Stoking Hopes of Economic Recovery," Reuters, May 23, 2022; Kristina Jovanovski, "Tourism in Turkey Expected to Surpass Pre-Pandemic Levels," *The Jerusalem Post*, January 31, 2023.

33 Benton et al., *COVID-19 and the State of Global Mobility in 2021*.

34 Times of Israel Staff, "For First Time in 20 Months, Israel Welcomes Back Tourists," *Times of Israel*, November 1, 2021; Lis, "Israel to Let Unvaccinated Tourists in."

35 Jon B. Alterman, "Covid-19 Splits the Middle East," Center for Strategic and International Studies, April 27, 2021.

36 Lisa Barrington, "Abu Dhabi Opens Up Free COVID-19 Vaccines to Tourists," Reuters, June 22, 2021.

37 Jovanovski, "Tourism in Turkey"; Doron Peskin, "Pandemic No Longer Israeli Tourism's Top Problem," *Al-Monitor*, March 31, 2022.

38 For example, the governments of Dubai and Qatar each invested at least USD 3 billion in Emirates and Qatar Airways, respectively. See Alexander Cornwell, "Dubai Steps in Again as Pandemic Drives Emirates to \$5.5 Bln Loss," Reuters, June 15, 2021.

39 Hadar Kane, "Cruel Summer: Tourists Aren't Returning to Israel," *Haaretz*, September 21, 2022; Rivkah Lambert Adler, "How Has Tourism in Israel Recovered from COVID-19 Closures?" *The Jerusalem Post*, October 1, 2022.

## C. *Irregular, Spontaneous, and Other Migration Flows*

Socioeconomic and political conditions in the MENA region worsened throughout the pandemic. Lockdowns and travel measures introduced in response to the public-health crisis, currency fluctuations, and political instability made this region increasingly insecure and drove large numbers of residents to leave. In a shift from pre-pandemic trends, irregular migration in the region was no longer primarily a matter of migrants from elsewhere moving to MENA countries to either stay or move onward to Europe; instead, residents of MENA countries were themselves leaving as well. Moreover, migrants began taking new irregular routes as border controls changed. This was not just the case for journeys to Europe. For example, some Ethiopian and Somali migrants who had been working in Yemen and Saudi Arabia initially reversed their journeys, traveling back across the Gulf of Aden and Red Sea to their origin countries or receiving repatriation assistance rather than staying in the region, although this trend has subsided as Saudi Arabia has reopened.

### Migration to Europe

Over the course of the pandemic, the complex dynamics of irregular migration from and through North Africa to Europe shifted in two main ways as economic and political conditions worsened. First, the composition of those seeking to reach Europe changed because more North Africans chose to attempt the dangerous crossing of the Mediterranean than at any point since the Arab Spring. Second, the internal routes and subsequent departure points irregular migrants use changed, with more departing from Morocco's Atlantic coast and from Tunisia, although Libya remained a primary departure point.

The number of North African irregular migrants departing for Europe grew dramatically, increasing each year between 2019 and 2022<sup>40</sup> as economic and political conditions worsened. While these issues were already simmering prior to the pandemic (with an increase in Tunisians attempting to reach Europe in 2017, for example), the pandemic pushed the situation to a breaking point. Economic desperation grew as pandemic-related border closures

decimated cross-border trade between Libya and Tunisia, the severe reduction in the tourism economy led to job losses, and the closure of legal pathways to Europe removed safer options for travel.<sup>41</sup> For example, the number of Tunisian irregular migrants departing spiked drastically in May 2020—only a few months

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*The composition of those seeking to reach Europe changed because more North Africans chose to attempt the dangerous crossing of the Mediterranean than at any point since the Arab Spring.*

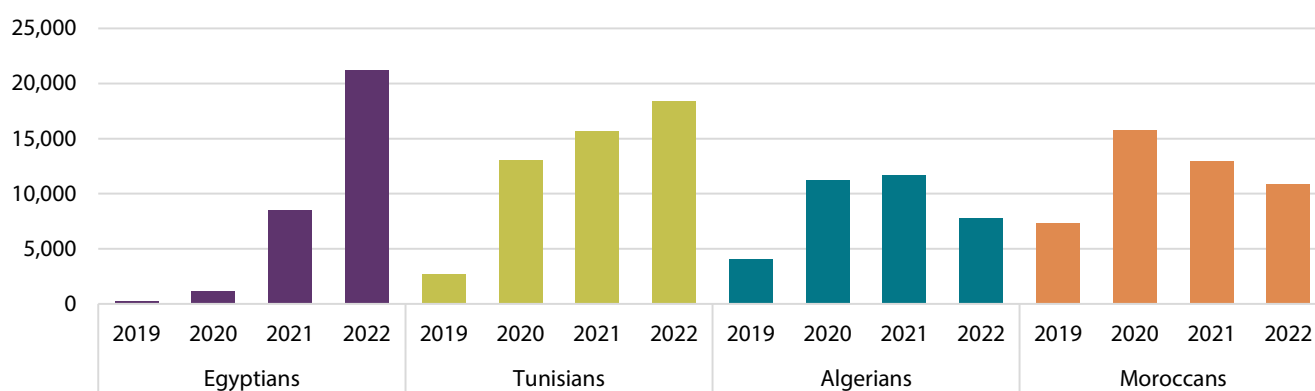
40 The number of detected irregular border crossings by Algerian, Egyptian, Libyan, Moroccan, and Tunisian nationals along the eastern, central, and western Mediterranean routes and the West African route increased from 16,969 in 2019 to 44,329 in 2020, then to 53,632 in 2021 and 61,421 in 2022. Author analysis of Frontex, "Detections of Illegal Border-Crossings Statistics Download (updated monthly)," accessed March 15, 2023.

41 Benton et al., *COVID-19 and the State of Global Mobility in 2021*.

after the pandemic's economic effects began to take hold—and grew in the ensuing years.<sup>42</sup> In both Algeria and Tunisia, political upheaval (including mass protests and an autocoup in Tunisia) sustained pressure to move.<sup>43</sup> The number of attempted departures continued to grow each year of the pandemic as economies continued to suffer. In 2021, Egyptians began to depart, typically from Libya, and this trend increased in 2022 following the Russian invasion of Ukraine and the ensuing food crises caused by interruptions to Ukraine's grain exports.<sup>44</sup>

FIGURE 3

### Annual Detected Irregular Border Crossings along Designated Routes\* by Migrants from Selected North African Countries, 2019–22



\* The number of detections of Egyptians and Tunisians is measured along the central Mediterranean Sea route. The number of detections of Algerians is measured along the western Mediterranean route by both land and sea. The number of Moroccans is measured along the western Mediterranean route (both land and sea) and the east Atlantic route.

Note: These figures refer to the number of irregular border crossings detected (undetected crossings are not included, and detections of repeat crossers are counted as separate detections), but they still provide a good overview of the trends in departures.

Source: Frontex, "Detections of Illegal Border-Crossings Statistics Download (updated monthly)," accessed March 15, 2023.

Moroccan irregular migration to Europe (unlike the more consistent Algerian, Egyptian, and Tunisian irregular migration) was concentrated primarily in two specific periods of mass departures along the eastern Atlantic Ocean route to the Canary Islands. The first occurred in October and November 2020, when several thousand Moroccans attempted the journey, and the second and smaller departure period was from August 2021 to February 2022.<sup>45</sup> This not only represented a major shift in Moroccan migration but was also emblematic of broader shifts in departure points within North Africa.

42 Matt Herbert, *Losing Hope: Why Tunisians Are Leading the Surge in Irregular Migration to Europe* (Geneva: Global Initiative Against Transnational Organized Crime, 2022). The Mediterranean had previously seen a large number of Tunisians crossing in 2011, but it had been relatively quiet for much of the decade. In January and February 2020, an unseasonal increase in Tunisians attempted to depart, which subsequently reduced during the first months of the pandemic. But beginning in May 2020, just two months after the World Health Organization declared COVID-19 a pandemic, the number of Tunisians attempting the crossing spiked considerably. From 2020 to 2022, a clear cycle of departures started in May and peaked in June or July before falling in earnest in October.

43 Matt Herbert, "Tunisia: Growing Irregular Migration Flows amid Worsening Political Fragility" (brief, Global Initiative Against Transnational Organized Crime, Geneva, 2022); Matt Herbert and Sofian Philip Naceur, "Algeria's Protests and Migration: The Fiercest Have It Wrong," Institute for Security Studies, March 15, 2019; Zine Labidine Ghebouli, "Algerians' Clandestine Exodus: A Complex National Tragedy," Middle East Institute, October 19, 2022.

44 Michaël Tanchum, *The Russia-Ukraine War Has Turned Egypt's Food Crisis into an Existential Threat to the Economy* (Washington, DC: Middle East Institute, March 2022).

45 Lucia Bird Ruiz-Benitez De Lugo, "North-West Passage: The Resurgence of Maritime Irregular Migration to the Canary Islands" (brief, Global Initiative Against Transnational Organized Crime, Geneva, December 2022).



After the height of the pandemic, while Libya remained a critical departure point for irregular migrants seeking to reach Europe, Tunisia's Mediterranean coast and Morocco's Atlantic coast emerged as new points of departure for both North African and sub-Saharan African migrants. Previously, Tunisia was not a popular departure point, and most departures from Morocco occurred in the north, with migrants crossing the western Mediterranean to mainland Spain. However, increased cooperation between Morocco and Spain, enhanced security efforts along the northward route many migrants use in Morocco, and pandemic lockdowns that limited mobility in northern Morocco all prompted a shift toward the more dangerous Atlantic crossing.<sup>46</sup> Meanwhile, heightened dangers in Libya, increased security and deportations in Algeria, and a growing migrant community in Tunisia help explain the increased sub-Saharan migrant population moving to and departing from Tunisia.<sup>47</sup>

Tunisia became an increasingly prominent departure point in 2023, particularly after Tunisian President Kais Saied's February speech claiming that sub-Saharan Africans were replacing Tunisians. Anti-Black racism in Tunisia has been an ongoing concern that has led to harassment of migrants, and Saied's speech ignited a powder keg of xenophobia, leading to attacks against Black Tunisians and migrants, including those in the country legally.<sup>48</sup> Many lost their jobs or housing, placing another burden on top of the pandemic's economic challenges. In the aftermath, many migrants attempted to leave Tunisia either by boat or voluntary repatriation, with some protesting outside the offices of International Organization for Migration (IOM) and United Nations High Commissioner for Refugees (UNHCR) to request repatriation assistance.<sup>49</sup>

Throughout the pandemic, North African countries did little to respond to the increase in their nationals departing to Europe besides increasing immigration enforcement.<sup>50</sup> To a certain extent, the governments could do little to address the underlying drivers of these departures in the short term, aside from undertaking drastic political and economic reform efforts, which has become even harder following the pandemic.<sup>51</sup> For example, Egypt, Lebanon, and Tunisia were all in negotiations with the International Monetary Fund for multi-billion-dollar bailout loans, which would require implementing significant reforms on short timelines as preconditions for receiving the funds. Tunisia rejected these terms, and even though Egypt has accepted them, it is unclear whether the Egyptian government is able to implement them successfully in a way that also reduces outward migration pressures or if they in fact worsen the situation for all but the wealthiest.<sup>52</sup>

46 Global Initiative Against Transnational Organized Crime, "Morocco: Organized Crime, Geopolitics, and Economic Woes Drive New Trends in 2021" (brief, Global Initiative Against Transnational Organized Crime, Geneva, July 2022); Ruiz-Benitez De Lugo, "North-West Passage."

47 Herbert, "Tunisia: Growing Irregular Migration Flows."

48 Nesrine Malik, "As the Disturbing Scenes in Tunisia Show, Anti-Migrant Sentiments Have Gone Global," *The Guardian*, March 13, 2023; Haythem Guesmi, "It Was Not Saied Who Introduced Anti-Black Racism to Tunisia," *Al Jazeera*, March 17, 2023.

49 Claire Parker, "Migrants Flee Tunisia amid Arrests and Racist Attacks on Sub-Saharan Africans," *The Washington Post*, March 9, 2023.

50 Algeria's practice of deporting migrants to Niger has created additional pressure on sub-Saharan migrants to move to Tunisia. See Herbert, "Tunisia: Growing Irregular Migration Flows."

51 Adam Hanieh and Rafeef Ziadah, "Pandemic Effects: COVID-19 and the Crisis of Development in the Middle East," *Development and Change* 53, no. 6 (2022): 1308–34.

52 Tarek Amara, "Tunisia President Rejects IMF 'Diktats,' Casting Doubt on Bailout," *Reuters*, April 6, 2023; Dawoud, "Egyptian Government Walks Risky Economic Tightrope"; Khalil Al-Anani, "Egypt and the IMF: Greater Foreign Debt and Deeper Economic Decline," Arab Center Washington DC, November 17, 2022; Bessma Momani, "The IMF and the Arab World: Beyond the Washington Consensus," Arab Center Washington DC, January 4, 2023.

For its part, Europe has attempted to enhance its cooperation with North African authorities, including giving additional funding and support for migrant interceptions and increased returns. For example, in July 2023, the European Union and Tunisia agreed to a broad cooperation deal that included more comprehensively combatting irregular migration across the Mediterranean, with Europe providing additional financial

support. Although this agreement later fell through, Tunisia began to pay more attention to departures.<sup>53</sup> Longstanding cooperation between Europe and Morocco, which has been relatively effective over time in preventing spontaneous departures, lapsed at several points during the pandemic. Moroccan inaction led to a large number of crossings into the Spanish enclaves of Ceuta and Melilla, which was seen as a response to Spain allowing the leader of the Polisario Front (the independence movement in Western Sahara) to enter Spanish territory for medical treatment. However, cooperation resumed after Spain shifted its position on Western Sahara to align with Morocco's, reinforcing the shift in migration patterns toward the Atlantic.<sup>54</sup> But the otherwise continued reliance on Europe-funded deterrence and interception efforts off North Africa's shores has served only to push migrants toward more dangerous routes and led to countless lost lives and stranded migrants in the Mediterranean.

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*Europe has attempted to enhance its cooperation with North African authorities, including giving additional funding and support for migrant interceptions and increased returns.*

### Yemen, the Eastern Route, and Saudi Arabia

The pandemic temporarily reversed the direction of migration flows from the Horn of Africa through to Yemen and Saudi Arabia. Historically, Ethiopian and Somali migrants would take the eastern route, crossing either the Gulf of Aden or the Red Sea and arriving in Yemen, many hoping to transit through to Saudi Arabia for work. This route was highly used, reaching record numbers immediately before the pandemic, and had prompted Saudi Arabia to crack down on illegal migration and work to repatriate migrants, especially Ethiopians.<sup>55</sup>

When the pandemic hit and borders closed, the demand to cross to Yemen reversed, as large numbers of migrants began instead to move from Yemen back to Somalia and Djibouti. In the first year of the pandemic, arrivals in Yemen from the Horn of Africa dropped by 85 percent and did not recover significantly in the next year.<sup>56</sup> At the same time, migrants from the Horn of Africa began crossing back from Yemen to Djibouti—a journey that had previously mostly been taken by Yemenis fleeing the civil war. In part, this reverse migration reflected the fact that these African migrants could not transit through Yemen to Saudi Arabia, as

53 Al Jazeera, "Tunisia and EU Finalize Deal on Migration," Al Jazeera, July 16, 2023; Bouazza Ben Bouazza and Sam Metz, "Tunisia Rejects European Funds and Says They Fall Short of a Deal for Migration and Financial Aid," Associated Press, October 3, 2023.

54 Global Initiative Against Transnational Organized Crime, "Morocco: Organized Crime, Geopolitics, and Economic Woes."

55 Beza Nisrane et al., "Orderly Migration and Sustainable Reintegration," in *The State of Migration in East and Horn of Africa: Report 2022*, eds. Tsion Tadesse Abebe and George Mukundi-Wachira (Geneva: IOM, 2023).

56 Author analysis of the following datasets: IOM, "DTM Yemen—Flow Monitoring 2019 Dataset" (dataset, January 20, 2020); IOM, "DTM Yemen—Flow Monitoring Dataset—2020" (dataset, January 7, 2021); IOM, "DTM Yemen—Flow Monitoring Datasets—December 2021" (dataset, January 6, 2022); IOM, "DTM Yemen—Flow Monitoring Datasets—December 2022" (dataset, January 9, 2023).

many intended, because the Saudi border was closed.<sup>57</sup> According to IOM data, most of these return trips occurred between July 2020 and July 2021, with an average of nearly 1,350 returns recorded per month during that period.<sup>58</sup> By comparison, from August 2021 through December 2022, only 555 returns occurred per month on average.<sup>59</sup>

*Before the pandemic, IOM had organized voluntary return flights for migrants unable to move onward from Yemen, but the pandemic halted these operations. IOM was unable to restart these returns until March 2021.*

In addition, pandemic-related border closures stranded many migrants along the route. Before the pandemic, IOM had organized voluntary return flights for migrants unable to move onward from Yemen, but the pandemic halted these operations. IOM was unable to restart these returns until March 2021.<sup>60</sup> Similarly, Saudi Arabia paused its deportations of migrants, primarily Ethiopians, which had been happening since 2017, albeit only

after international pressure because of the risk of overwhelming Ethiopia's quarantine facilities. Unlike IOM, which took a year before resuming humanitarian return flights, Saudi Arabia resumed regular deportation flights in September 2020.<sup>61</sup> It took longer for spontaneous, voluntary returns of Yemenis from Saudi Arabia to resume, with crossings not picking up pace until June 2021.<sup>62</sup>

Spontaneous departures from the Horn of Africa toward Yemen began to resume in June 2021, and August 2022 saw departures that month reach pre-pandemic levels. According to IOM calculations, while arrivals in 2022 as a whole were still about half of pre-pandemic levels, the number of arrivals was increasing toward the end of the year and was projected to keep increasing.<sup>63</sup> At the same time, returns from Yemen to the Horn of Africa dropped, signaling somewhat of a shift back to normal migration patterns in this corridor. This trend continued in 2023, with arrivals in Yemen just under pre-pandemic levels for the first half of the year and returns from Yemen holding steady.<sup>64</sup>

57 Tsion Tadesse Abebe and Mohamed Daghar, "A Dangerous Road Home for Horn of Africa Migrants," Institute for Security Studies, May 25, 2021.

58 IOM, "2020 Migrant Movements between the Horn of Africa and the Arabian Peninsula" (fact sheet, January 26, 2021); IOM, "2021 Migrant Movements between the Horn of Africa and the Arabian Peninsula" (fact sheet, February 10, 2022).

59 IOM, "2021 Migrant Movements"; IOM, "2022 Migrant Movements between the Horn of Africa and the Arabian Peninsula" (fact sheet, February 10, 2023).

60 IOM Yemen, "Voluntary Humanitarian Return Flash Update No. 1" (fact sheet, March 17, 2021).

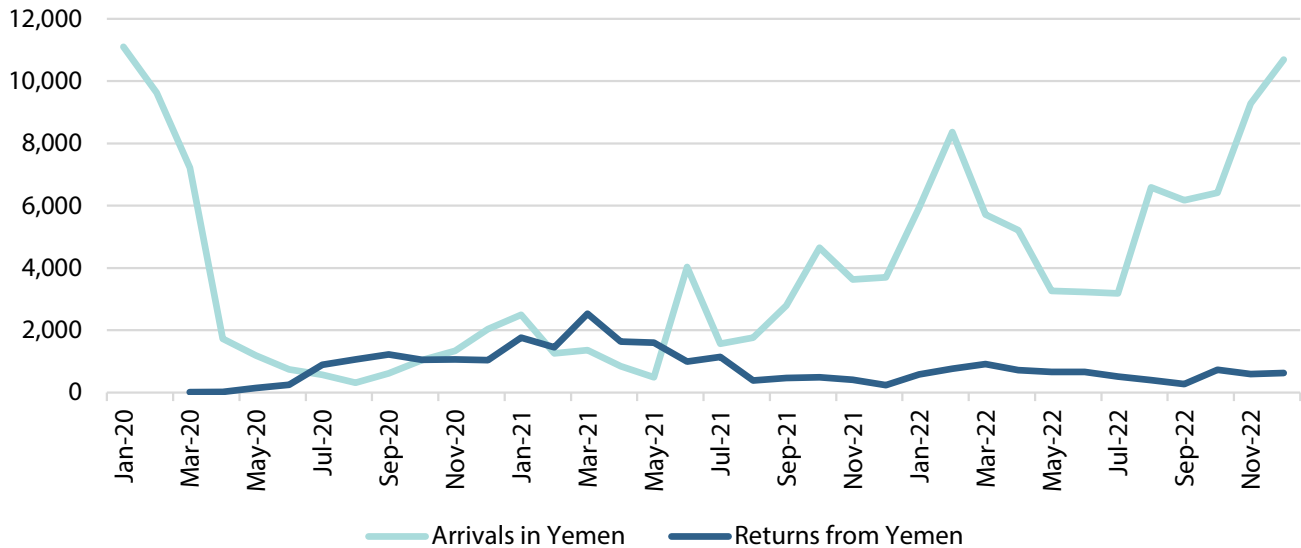
61 IOM, "Return of Ethiopian Migrants from the Kingdom of Saudi Arabia: 5 May 2017–30 September 2020" (fact sheet, October 13, 2020).

62 IOM, "DTM Yemen—Flow Monitoring 2019 Dataset"; IOM, "DTM Yemen—Flow Monitoring Datasets—December 2021"; IOM, "DTM Yemen—Flow Monitoring Datasets—December 2022."

63 IOM, "2022 Migrant Movements."

64 Author analysis of IOM, "DTM Yemen—Flow Monitoring Datasets—June 2023" (dataset, July 10, 2023); IOM, "Migration along the Eastern Corridor as of 30 June 2023" (fact sheet, July 26, 2023).

**FIGURE 4**  
**Trends in Migration across the Gulf of Aden and Red Sea, 2020–22**



Sources: International Organization for Migration (IOM), “DTM Yemen—Flow Monitoring 2019 Dataset” (dataset, January 20, 2020); IOM, “DTM Yemen—Flow Monitoring Dataset—2020” (dataset, January 7, 2021); IOM, “DTM Yemen—Flow Monitoring Datasets—December 2021” (dataset, January 6, 2022); IOM, “DTM Yemen—Flow Monitoring Datasets—December 2022” (dataset, January 9, 2023); IOM, “2020 Migrant Movements between the Horn of Africa and the Arabian Peninsula” (fact sheet, January 26, 2021); IOM, “2021 Migrant Movements between the Horn of Africa and the Arabian Peninsula” (fact sheet, February 10, 2022); IOM, “2022 Migrant Movements between the Horn of Africa and the Arabian Peninsula” (fact sheet, February 10, 2023).

### Departures from Lebanon

In Lebanon, the pandemic’s impacts on the economy combined with political conflict to trigger a substantial increase in emigration, both via regular and irregular channels. The ongoing economic and political crisis, which began in 2019 with widespread protests, worsened with the pandemic, the August 2020 port explosion in Beirut, and increased political conflict. In what analysts have considered one of the worst economic collapses in history, Lebanese currency has little worth, banks refuse to allow withdrawals, and ongoing strikes and shortages have brought the country to a halt.<sup>65</sup>

These multiple crises have led to new patterns of emigration, but how and to where people move and whether they move at all is shaped by their economic class and nationality. By the beginning of the pandemic, some Lebanese nationals were already leaving, particularly those who were socioeconomically well-off or had foreign passports. Emigration increased as the crisis continued, and around 90 percent of all Lebanese with foreign passports were estimated to have left as of 2021.<sup>66</sup> Meanwhile, Lebanese without foreign passports have faced greater challenges in moving. Lebanese passports have been hard to obtain

65 World Bank, *Lebanon Economic Monitor: Lebanon Sinking (To the Top 3)* (Washington, DC: World Bank, 2021).

66 Stephanie Radi, “230,000 Lebanese Left Lebanon in 4 Months: NGO,” *Al Andalou*, October 18, 2021.

(at one point, the Lebanese general services stopped issuing new passports because so many people were applying that they ran out of blank passport booklets),<sup>67</sup> and those with Lebanese passports have not always had somewhere to go.

Most could not emigrate to traditional destinations in Europe and the Americas. Because assets in Lebanon are inaccessible or devalued, many would-be migrants do not meet income thresholds for visas in certain countries. This in part has led Lebanese to nontraditional destinations such as countries in the Balkans and the Caucasus, which offer more accessible immigration pathways. By establishing themselves in countries that were relatively easier for them to enter, they could begin to rebuild their capital and restart lives away from Lebanon.<sup>68</sup>

Low-income Lebanese have also begun to depart Lebanon spontaneously on boats, often with tragic results. While Lebanon had already been a departure point for Palestinians and Syrians, Lebanese have been increasingly joining their ranks, using smugglers to attempt the dangerous journey—often to Cyprus but also to Italy. Much like other areas of the Mediterranean, there have been numerous reports of migrant deaths off the Lebanese and Syrian coasts and interceptions by the Lebanese Navy, which then returns the migrants to Lebanon.<sup>69</sup>

The departure of many educated or higher-income Lebanese has raised concerns about brain drain and the impact on Lebanon's recovery. Because many of those who have been able to move worked in critical and already understaffed sectors such as health and education, or had the financial means to inject capital into the Lebanese economy, their departure may further hamper the recovery of these sectors.<sup>70</sup> Meanwhile, a persistently high desire to emigrate among the country's youth has raised concerns about future labor shortages.<sup>71</sup>

At the same time, Lebanon has a long history of emigration and return, deep diasporic ties, and high remittance flows. Remittances became even more important during the pandemic, representing more than half of Lebanon's GDP in 2021.<sup>72</sup> Often, visiting relatives will bring remittances in foreign currency (typically U.S. dollars),<sup>73</sup> and this influx of cash as well as spending by these relatives while in the country can

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*While Lebanon had already been a departure point for Palestinians and Syrians, Lebanese have been increasingly joining their ranks, using smugglers to attempt the dangerous journey.*

67 Middle East Monitor, "Lebanon Runs Out of Passports, Say Officials," Middle East Monitor, April 29, 2022.

68 Rabih Damaj, "Lebanese Opt for New Emigration Destinations amid Crises," Al-Monitor, December 9, 2021.

69 Al Jazeera, "Death Toll from Lebanon Asylum Seeker Boat Tragedy Rises to 94," Al Jazeera, September 24, 2022; Bassem Mroue, "I Am Dead Here': Lebanese Join Mideast Migrants to Europe," Associated Press, December 9, 2021; Timour Azhari and Laila Bassam, "Poverty in Lebanon's 'City of Billionaires' Drives Deadly Migration," Reuters, September 26, 2022.

70 Sarah El Deeb, "WHO Director: Lebanon's Brain Drain Threat to Health Sector," Associated Press, September 17, 2021; Tom Perry, "Lebanon's Turmoil Fuels Brain Drain," Reuters, July 21, 2020; Anchal Vohra, "Lebanon Is in Terminal Brain Drain," *Foreign Policy*, August 9, 2021.

71 Ghassan Dibeh, Ali Fakih, and Walid Marrouch, "Decision to Emigrate amongst the Youth in Lebanon," *International Migration* 56, no. 1 (2018): 5–22.

72 Sebastian Shehadi, "Lebanon Is Now the Most Remittance-Dependent Country in the World," Investment Monitor, December 14, 2022.

73 Tarek Ali Ahmad, "A Tale of Two Christmases in Crisis-Stricken Lebanon," *Arab News*, December 24, 2022.

represent a lifeline for individuals and families. But as the crisis wears on and overall economic conditions remain untenable, it is unclear whether and for how long this lifeline will be enough to keep more Lebanese from leaving.

*Refugees often live well below the poverty line and are legally barred from working in most sectors, yet they could be an important source of labor to fill the demand created by Lebanese emigration.*

Somewhat lost in the discussion of Lebanese emigration is recognition of the opportunities that Lebanese emigration could present for the Palestinian and Syrian refugee populations in Lebanon. These refugees often live well below the poverty line and are legally barred from working in most sectors, yet they could be an important source of labor to fill the demand created by Lebanese emigration. Advocates and international organizations have already made a significant push to expand labor

market opportunities for these populations, but the government continues to resist these efforts. A 2021 decision by the minister of labor to open up additional labor market sectors to Palestinians seemed to indicate some movement in this direction, but the Shura council later rejected the decision based partly on arguments that the minister had exceeded his authority.<sup>74</sup> The rejection was also likely based in part on arguments that expanding labor rights would be a step toward naturalizing Palestinians, which would alter Lebanon's demographic balance, and it is thus in line with the Lebanese government's well-documented reluctance to extend rights that could lead to permanent, durable local integration for Palestinian and Syrian refugees. Of course, Lebanon's larger demographic-political conflict is itself the source of much of the political and economic strife leading to emigration in the first place, and the increased anti-refugee sentiment that underpins the drive to repatriate Syrian refugees only makes this worse (see Box 2).

<sup>74</sup> Tzvi Joffe, "Palestinian Professionals Banned from Work in Lebanon for Second Time," *The Jerusalem Post*, February 13, 2022; The New Arab Staff, "Lebanon Backtracks on Move to Open up Jobs to Palestinians," *The New Arab*, February 11, 2022. The Shura council also rejected earlier reforms of the kafala system, meaning that it is unlikely any migrant labor reforms can be implemented this way (as opposed to legislative changes).

## BOX 2 Resuming Returns to Syria

The border closures implemented during the pandemic put a temporary halt on the growing push to repatriate Syrian refugees living in Lebanon and Turkey. But as the pandemic wore on, officials in both countries began to resume these efforts, using the pandemic's economic strain and public discontent as justification. Since before the pandemic, the Lebanese and Turkish governments have worked to encourage, or force, many of the millions of Syrian refugees living in their countries to leave. Lebanon, for example, waived exit fees to incentivize voluntary return, while Turkey allowed Syrians to return temporarily to see if they wanted to do so permanently. The Turkish government also advocated for returns, claiming that parts of northwest Syria that it had secured were safe. Despite these assurances and options for temporary relocation, it is likely that many of the Syrians who repatriated did so involuntarily.

Pandemic-era border closures brought these returns to a halt. Not only could Syrians not return or be returned, but those who were temporarily outside of their countries of refuge—including in Syria—were stranded. Borders did eventually reopen, but the pandemic's economic implications combined with Syrian refugees' exclusion from national safety nets heightened the vulnerability that many faced. As societies around them also struggled, refugees became convenient scapegoats.

About two years after the initial halt, both Lebanon and Turkey resumed facilitating, and forcing, returns. Some Syrians have returned voluntarily, and many have cited economic insecurity as their reason, although others have described wanting to reunite with family who had refused to leave Syria. Many others have been coerced. For example, Syrians in Turkey have reportedly been forced to attest to their willingness to return, and others who have made a short visit to Syria have been denied re-entry into Turkey by the Turkish authorities. Some have simply been deported. It is difficult to find accurate statistics, but estimates point to at least several thousand Syrians having been forcefully returned, likely in violation of international law.

The Bashar al-Assad regime in Syria, meanwhile, has partly welcomed returns, especially those to rural areas where returnees do not strain the government's ability to provide services. This not only brings the government income from taxation on remittances but also helps bolster the perception that Syria is safe, a key aspect of normalizing relations with its neighbors. But as reports from multiple human rights organizations attest, there are no guarantees for Syrians' safety upon return. Estimates indicate that several thousand former refugees have been arrested upon return, including examples of torture and forced disappearances.

Lebanon's political crisis, Turkey's May 2023 presidential elections, and the February 2023 earthquake in the Turkish-Syrian border regions have all exacerbated anti-refugee rhetoric and bolstered public support in host communities for returning Syrians. Whether Turkey or Lebanon will be able to implement mass returns, which would almost certainly constitute refoulement, remains to be seen. Syrians themselves seem generally inclined to remain abroad, and this stance does not appear to be changing.

Sources: Tamirace Fakhoury and Derya Ozkul, "Syrian Refugees' Return from Lebanon," *Forced Migration Review* 62 (October 2019): 26–28; Zeynep Sahin Mencutek, "Encouraging Syrian Return: Turkey's Fragmented Approach," *Forced Migration Review* 62 (October 2019): 28–31; Henry Ridgwell, "Facing Poverty and Hostility, Refugees in Turkey Mull Return to War-Torn Syria," *Voice of America*, December 9, 2022; Jennifer Holleis and Kersten Knipp, "Syrian Refugees Fear Turkey Will Force Them Back," *Deutsche Welle*, May 24, 2022; Reuters, "Despite Talk of Returns, Turkey Quietly Works to Integrate Syrian Refugees," *Arab News*, March 29, 2019; Abby Sewell, "Heading Home: Syrian Refugees in Lebanon Going Back to Syria," *AP News*, October 26, 2022; Mohammad Azakir, "Future Unclear for Syrian Refugees as Lebanese Repatriations Begin," *Reuters*, October 26, 2022; Timour Azhari, "Lebanon to Resume Sending Refugees Back to War-Damaged Syria," *Reuters*, October 12, 2022; Jasmin Lilian Diab, *Safe Return and Voluntary Repatriation for Syrian Refugees from Lebanon: What Needs to Happen Next* (New York: United Nations University, 2023); Al Jazeera, "Lebanon Begins 'Voluntary' Repatriation of Syrian Refugees," *Al Jazeera*, October 26, 2022; Emma Wallis, "Syrian Refugees in Lebanon and Turkey Fear Being Sent Back Home," *InfoMigrants*, July 21, 2022; Muhsen AlMustafa, "The Selective Return of Syrian Refugees," *The Tahrir Institute for Middle East Policy*, January 23, 2023; Kelsey Norman, "Migration and Displacement in the Arab World Demands a More Equitable Response," *Carnegie Endowment for International Peace*, May 3, 2023.

### 3 The Pandemic's Impact on Policymaking

Pandemic-era mobility trends shone a spotlight on the fragile nature of the MENA region's migration systems, economies, and political stability. They also reemphasized the importance of ongoing efforts to reshape migration and movement throughout the region, especially in the Gulf. Prior to the pandemic, Gulf governments were embarking on long-term strategies to transform their labor markets away from dependency on migrant workers and to diversify their economies beyond the energy sector. While the pandemic initially raised uncertainty about the feasibility of these changes, it ultimately hastened some changes and prompted innovation that could spur further policy movement. At the same time, the pandemic also highlighted the challenges that remain and some likely to arise in the future, raising important questions about the Gulf's attractiveness as a migration and mobility hub.

#### A. *Enhancing Protections for Migrant Workers*

The MENA region's reliance on restrictive sponsorship (kafala) systems to facilitate migrant labor has long raised concerns about the lack of worker protections (see Box 1). Qatar, for example, built the infrastructure for the 2022 FIFA World Cup through a workforce of mostly migrant workers, who in practice had few protections. As predicted when Qatar was first awarded the World Cup in 2010, numerous reports emerged of migrants who died or were injured working in harsh conditions or who had their pay withheld.<sup>75</sup> Initial reform efforts from 2009 to 2012 were either halted or revoked, and even though reform efforts have been ongoing since then (particularly driven by the International Labor Organization), uptake and implementation before the pandemic was limited.<sup>76</sup>

The pandemic increased pressure on Gulf states to reform sponsorship regulations in ways that both increased migrant protections (at least on paper) and allowed employers greater flexibility to respond to economic conditions. Several governments enabled employers to share surplus workers with other firms, adding a level of flexibility to work permits that opened additional job opportunities for migrants, albeit on employers' terms.<sup>77</sup> Qatar and Saudi Arabia adopted structural reforms allowing migrant workers to more easily switch employers, and though these reforms were in progress before the pandemic, they may have been implemented quicker to respond to the shortage of incoming labor.<sup>78</sup> Additional reforms proliferated as the pandemic continued. In Qatar, for example, the Ministry of Administrative Development, Labour, and Social Affairs launched a new standard employment contract for domestic workers in 2021, which has been rolled out by government-run recruiting centers in Bangladesh, India, Pakistan, and Sri Lanka.<sup>79</sup> In 2022, the United Arab Emirates introduced several new policies and laws providing unemployment insurance

75 For an overview, see BBC, "World Cup 2022: How Has Qatar Treated Foreign Workers?" BBC, November 9, 2022; Human Rights Watch, *Human Rights Guide for Reporters: 2022 FIFA World Cup in Qatar* (New York: Human Rights Watch, 2022).

76 Sophia Kagan and Ryszard Cholewinski, *Reforming the Sponsorship System in the Gulf Cooperation Council Countries: Opportunities and Challenges as a Result of COVID-19 and the Fiscal Crisis* (Jeddah, Saudi Arabia: Gulf Labor Markets, Migration, and Population Program and Gulf Research Center, 2022).

77 Kagan and Cholewinski, *Reforming the Sponsorship System*.

78 Kagan and Cholewinski, *Reforming the Sponsorship System*.

79 International Labor Organization (ILO) Project Office for the State of Qatar, "Progress Report on the Technical Cooperation Programme between the Government of Qatar and the ILO" (progress report, ILO, Doha, December 2021).



for workers of all nationalities,<sup>80</sup> a new digital platform to improve migrant workers' living conditions by determining the validity and safety of accommodations,<sup>81</sup> and a new law that implements a regulatory framework for domestic workers.<sup>82</sup>

The reforms adopted during the pandemic followed advocacy by governments in migrants' countries of origin, some of which prevented their workers from migrating abroad until kafala reforms were adopted. Despite strong demand to emigrate in many origin countries, including on the part of many repatriated migrants,<sup>83</sup> governments in countries such as the Philippines would not approve further labor migration until certain conditions were met.<sup>84</sup> With the private sector in the Gulf needing workers as the economy started to recover, origin countries had leverage to negotiate greater safeguards, resulting in several bilateral agreements to facilitate fairer recruitment and enhance worker protections. Examples include an August 2022 agreement between Saudi Arabia and Indonesia to facilitate recruitment,<sup>85</sup> a November 2022 agreement with the Philippines that led to it lifting its ban on emigration to Saudi Arabia,<sup>86</sup> and several agreements between Gulf states and African nations.<sup>87</sup>

Whether these reforms result in better working conditions, less abuse and wage theft, and fairer and more ethical recruitment remains to be seen. These reforms have come too late in many contexts to prevent widespread labor violations. For example, the reform of the kafala system in Qatar occurred after nearly all the infrastructure work for the World Cup was complete, and even once implemented, the reform did not prevent some migrants from reportedly being removed from the country without receiving their wages in the days before the event.<sup>88</sup> Nonetheless, these policy efforts could mark a significant shift in the Gulf's orientation toward labor migration going forward, with much-needed momentum provided by the pandemic.

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*These policy efforts could mark a significant shift in the Gulf's orientation toward labor migration going forward, with much-needed momentum provided by the pandemic.*

80 Migrant-Rights.org, "Migrant Workers to Be Included in UAE's New Unemployment Insurance Scheme," Migrant-Rights.org, May 24, 2022.

81 NRI Vision Legal Desk, "UAE Launches a New Platform for Safe Labour Accommodation," NRI Vision, February 6, 2022.

82 Zainab Mansoor, "UAE's New Domestic Worker Law Comes into Force Today," *Gulf Business*, December 15, 2022.

83 Joanna Slater, Kareem Fahim, and Kate McQue, "Migration, in Reverse," *The Washington Post*, October 1, 2020.

84 For example, in May 2021, the Philippines temporarily halted the deployment of workers to Saudi Arabia to address reports that employers were forcing migrants to pay for their own pandemic quarantine, insurance, and testing. See Reuters, "Philippines Halts Deployment of Workers to Saudi Arabia," Reuters, May 28, 2021.

85 Saudi Arabia and Indonesia signed a bilateral agreement in August 2022 to increase the number of Indonesian domestic workers deployed while streamlining the recruitment process. See Migrant-Rights.org, "Saudi Arabia and Indonesia Sign Bilateral Agreement on Domestic Workers," updated September 5, 2022.

86 Some of the reforms stemming from the agreement include the adoption of a standard contract and an enhanced dispute resolution system. See AP News, "Philippines Lifts Ban on Sending Workers to Saudi Arabia," AP News, November 7, 2022.

87 For example, Nigeria signed worker protection agreements with Qatar and the United Arab Emirates in December 2021. See Anthony Ailemen, "Nigeria Signs Bilateral Agreements with UAE, Qatar to Protect 7,000 Workers," *Business Day*, December 17, 2021; ILO, "Bilateral Labour Migration Instruments—Africa and Arab States" (thematic brief, ILO, Geneva, November 2021).

88 Marina Lopes, "Qatar Departs Migrant Workers Protesting Alleged Abuse before World Cup," *The Washington Post*, August 23, 2022; Andrew Mills, "Exclusive: Thousands of Workers Evicted in Qatar's Capital Ahead of World Cup," Reuters, October 29, 2022.

## B. Changing Workforce Composition

### Reducing Reliance on Migrant Workers

The COVID-19 pandemic struck while governments in the GCC were working to rebalance their labor force away from a heavy reliance on migrant workers and to diversify their economies away from a reliance on oil and the energy sector. For decades, these countries had been concerned about their almost complete reliance on foreign labor in the private sector, and governments have attempted to incentivize and mandate the nationalization of the private-sector labor force (i.e., increasing the proportion of citizens among workers in the sector).<sup>89</sup> At the same time, the long-term unsustainability of the oil industry and the short-term fiscal downturns associated with drops in oil prices have heightened the need to decrease national workforces' reliance on public-sector jobs. But these efforts had yet to achieve significant shifts in the labor force composition when COVID-19 hit.

The pandemic highlighted the need to reduce public-sector bloat and the potential need for nationals to fill the private-sector jobs vacated by repatriated foreign workers. At the same time, it offered governments an opening to accelerate these nationalization policies. In the initial months of the pandemic, GCC governments moved to ensure that nationals could keep their jobs through income and job support initiatives, which they did not offer to migrant workers. As discussed in Section 2.A, they encouraged foreign workers to repatriate, using this as an opportunity to reduce the number of these workers in the country. In addition, while facilitating repatriations, Kuwait announced it would aim to reduce migrant workers' presence in the private sector to 30 percent.<sup>90</sup> Throughout the pandemic, Saudi Arabia and other countries issued numerous changes to the quotas imposed on certain sectors for how many nationals companies must employ.<sup>91</sup>

The reliance on quotas as well as wage subsidies and government support to make private-sector jobs more attractive to native-born workers is not new in the region. However, efforts to use these tools in previous nationalization efforts have failed to address key constraints, namely that public-sector jobs are typically much better compensated and have greater job protections. In addition, many nationals do not have the qualifications or education level necessary for the types of private-sector jobs they might be willing to take. The private sector also has an economic incentive to continue to rely on migrant workers, whose per-worker labor tends to be more productive than that of Gulf country citizens.<sup>92</sup>

Thus, even as some Gulf states (particularly Kuwait and Saudi Arabia) have ramped up deportations of migrant workers, canceled expat visas, and tried to shift local workers from the public to the private sector, there is an acknowledgement that migrant labor will still be a critical part of the workforce for the near future. The Gulf states' continued dependency on migrant workers is reflected in their attempts to

89 Abbas A. Al-Mejren and Abdul A. Erumban, *GCC Job Nationalization Policies: A Trade-Off between Productivity and Employment* (Sharq, Kuwait: The Conference Board, 2021).

90 Kagan and Cholewinski, *Reforming the Sponsorship System*.

91 Al-Mejren and Erumban, *GCC Job Nationalization Policies*.

92 Productivity in this context refers to how much economic output an individual worker creates. According to Al-Mejren and Erumban, migrant workers in the Gulf produce more economic activity than Gulf nationals partly because of migrant workers' lower wages and concentration in the private sector, and the lack of investment in productivity increases in public-sector work. See Al-Mejren and Erumban, *GCC Job Nationalization Policies*.

restimulate labor migration by reforming the kafala system, as well as competition among Gulf states for high-skilled and wealthy expats to foster economic growth.

### Incentivizing High-Wealth Immigration

Another aspect of the MENA region's ongoing economic reforms and diversification has been attracting high-wealth immigration. By securing the long-term residency and investments of expatriates with significant financial resources or those with highly specialized skills, governments aim to grow their economies, promote development, and maintain access to foreign currency.<sup>93</sup> To attract these individuals, states promote favorable conditions (such as lower rates of taxation and special tax exemptions along with high standards of living) and ease access to long-term residency and citizenship. Although these programs and reforms were in progress prior to the pandemic, the risk of losing its high-income expatriate community, coupled with the opportunity to take advantage of the widespread adoption of remote work, gave new impetus to implementing and expanding these policies. Such policies exist across the region, but developments are particularly concentrated in the GCC, as Member States compete for expatriates in a constant game of one-upmanship.<sup>94</sup>

*Governments have begun to provide more pathways for high-income residency without local sponsors, allowing more opportunities for self-employment, entrepreneurship, and remote work.*

The reforms in question fall into three different categories. The first and most established in the Gulf is golden or investor visas, which aim to attract foreign wealth to boost countries' economies by requiring up-front investments before people enter. These visas allow high-wealth individuals to buy property, open businesses, and invest in capital development funds. They can also be used by "special talents" who bring specific skills and human

capital, including doctors, athletes, and specialists in certain fields.<sup>95</sup> Throughout the pandemic, Gulf states broadened access to these visas. The United Arab Emirates expanded eligibility for its existing golden visa and introduced a new retirement visa, while Bahrain and Oman both announced new investor or golden residency programs.<sup>96</sup> In addition, governments have begun to provide more pathways for high-income residency without local sponsors, allowing more opportunities for self-employment, entrepreneurship, and remote work. Saudi Arabia relaxed its sponsorship rules in March 2021 and later created an agency to govern sponsorless premium residency programs, and the United Arab Emirates created a sponsorless residence visa.<sup>97</sup>

93 Elizabeth Shaw, "Millionaire Migration Rises and Heads to New Destinations," *Migration Information Source*, November 10, 2022.

94 Ksenia Svetlova, "The Great Gulf Citizenship Competition—Analysis," *The Jerusalem Post*, November 19, 2021. In some cases, this one-upmanship is targeted directly at the other country. For example, Saudi Arabia instituted a requirement that large international companies have regional headquarters based in Saudi Arabia to gain public-sector contracts. See Nayera Abdallah and Alexander Cornwell, "Saudi Arabia Won't Work with Foreign Firms without Regional HQ from 2024," Reuters, February 15, 2021; PwC, "KSA: Regional Headquarters Program," updated March 15, 2023.

95 Ruth O'Malley, "New UAE Golden Visa, Green Visa, Long-Term Visit Visa Rules Come into Effect Today: Benefits and How to Apply," *Arabian Business*, October 3, 2022.

96 Oman announced its investment residency visa in November 2021, while Bahrain introduced its version in February 2022. See PwC, "GCC Immigration and Employment Roundup: February 2022," updated March 8, 2022; PwC, "GCC Immigration and Employment Roundup: November 2021," updated November 4, 2021.

97 PwC, "GCC Immigration and Employment Roundup: Summer 2022," updated July 3, 2022; Embassy of the Kingdom of Saudi Arabia in Washington, DC, "Premium Residency Visa," accessed February 29, 2024.

Alongside relaxing immigration rules for high-wealth immigrants, Gulf countries have also made it somewhat easier to acquire citizenship in order to promote long-term investment. In February 2021, the United Arab Emirates introduced new laws to grant citizenship to exceptional foreigners, with Saudi Arabia following suit in December 2021. While this is a logical next step from golden or investor visas, it represents a dramatic shift. Previously, these countries closely guarded their citizenship and the benefits it confers, including higher pay, lower taxes, subsidized services, and a potentially stronger passport: as few as 10 percent of UAE residents are UAE citizens, for example.<sup>98</sup> But access to citizenship opportunities remains limited: the state must proactively select those who are eligible. By comparison, non-Gulf countries in the MENA region have much more direct investment pathways to citizenship, such as Egypt's newly introduced program aimed at bolstering its foreign currency reserves.<sup>99</sup>

The United Arab Emirates has also introduced a digital nomad visa, which allows greater flexibility to work remotely from the country. A localized version of this program was first introduced by Dubai in October 2020, and it was expanded nationwide in April 2021. The visa allows individuals to work from the United Arab Emirates for foreign companies for up to a year at a time while receiving access to most public services, despite not paying local income tax.<sup>100</sup> This type of visa has not been adopted in the other GCC countries.

Given the lack of publicly available data on the uptake of these different legal pathways, it is difficult to assess how widely they are being used. Of the metrics that do exist, in 2022, the United Arab Emirates was projected to have a net inflow of 4,000 high-net-wealth individuals (the highest in the world), while Saudi Arabia was forecasted to lose 600, although this is a lower outflow than in recent years.<sup>101</sup> The Dubai office of the General Directorate of Residency and Foreign Affairs also issued 152,000 golden visas from 2019 to 2022, with more than half issued in 2022 alone as eligibility was widened.<sup>102</sup>

### C. *Facilitating Large-Scale Mobility and Travel*

A key prong of Gulf countries' strategies to increase international tourism and enhance their international image has been to bid for the rights to host megaevents. In 2010, Qatar succeeded in winning the rights to host the 2022 FIFA World Cup, and in 2013, Dubai followed suit with a successful bid for Expo 2020, the modern-day version of the World's Fair.<sup>103</sup> The World Cup was expected to generate USD 17 billion for Qatar and attract 1.2 million visitors,<sup>104</sup> while Expo 2020 was projected to generate USD 23 billion for the United Arab Emirates with about 17.5 million external visitors.<sup>105</sup> In addition, Saudi Arabia hosts the annual

98 Natasha Turak, "The UAE Is Now Offering Citizenship to Foreigners, and the Economic Gains Could Be 'Transformative,'" CNBC, February 1, 2021.

99 Middle East Eye, "Egypt: Thirsty for Dollars, Government Eases Citizenship Terms of Foreigners," Middle East Eye, March 8, 2023.

100 Kate Hooper and Meghan Benton, *The Future of Remote Work: Digital Nomads and the Implications for Immigration Systems* (Washington, DC: Migration Policy Institute, 2022); Mark Johanson, "The Digital Nomad Visas Luring Workers Overseas," BBC, July 11, 2022.

101 Henley & Partners, "Henley Private Wealth Migration Dashboard," accessed May 5, 2023; Shane McGinley, "Saudi Slips and UAE Soars as Millionaires Seek New Homes," Arab Gulf Business Insight, June 15, 2022.

102 Government of Dubai, "GDRFA Dubai Issues More than 152,000 Golden Visas, 16m Transactions Handled between 2019 and 2022," November 16, 2022; Tala Michel Issa, "Almost 80,000 UAE Golden Visas Issued in 2022: GDRFA," Al Arabiya News, January 12, 2023.

103 Yousef Gamal El-Din, "Dubai Celebrates Winning Right to Host Expo 2020," CNBC, November 27, 2013.

104 Brad Adgate, "The 2022 FIFA Men's World Cup: By The Numbers," *Forbes*, November 14, 2022.

105 Daniel Partovi, "Dubai to Host Expo 2020: The Anticipated Economic Boost," Jones Day, May 2014; Tuqa Khalid, "Expo 2020 Dubai to Attract 11 Million Foreign Visitors: Officials," Reuters, May 27, 2019; Sameer Hashmi and Ian Rose, "Rescheduled Dubai Expo Hopes to Attract 25 Million Visits," BBC, April 11, 2021.

Hajj pilgrimage, typically bringing 2.5 million pilgrims to the country and about USD 30 billion per year in revenue.<sup>106</sup> During the pandemic, however, planning large-scale events posed a particularly tricky problem, since mass gatherings and international travel risked further spreading the virus. Given the economic and soft-power importance of these events to the Gulf, ensuring they could be held successfully and with enough visitors were governmental priorities.

The debate over whether to hold these types of events and, if so, how spanned the globe. In the short term, events scheduled for 2020—including Expo 2020 and the Tokyo Summer Olympics—were postponed by a year, but even then, it was unclear how to hold these megaevents in a way that would minimize the still significant public-health risks. On the one hand, Japan (in hosting the delayed Summer Olympics in 2021) and China (which hosted the 2022 Beijing Winter Olympics) operated under strict COVID-19 protocols and entry measures, making it difficult, if not impossible, for international fans to enter the countries to attend.<sup>107</sup> By contrast, the Gulf states opened their borders and welcomed hundreds of thousands of visitors for the Hajj and the expo—events that cannot be fully experienced or monetized through television broadcasts—as well as for the World Cup.

The annual Hajj pilgrimage to Saudi Arabia was the first major event in the region during the pandemic, but it returned to scale gradually. The 2020 Hajj allowed only 1,000 Saudi residents and citizens to participate, most of whom had recovered from COVID-19 and had few comorbidities, and required physical distancing, constant testing, quarantines, and location monitoring throughout.<sup>108</sup>

The following year, Saudi Arabia allowed up to 60,000 pilgrims, provided they had been vaccinated; however, nonresident pilgrims remained unable to officially attend.<sup>109</sup> In 2022, Saudi Arabia lifted many restrictions on travel and domestic activity to allow nearly 780,000 international pilgrims to enter, though still with some requirements. Pilgrims had to be vaccinated, under age 65, and test negative on a PCR test within 72 hours of travel.<sup>110</sup> For the 2023 Hajj (which took place in the last week of June), Saudi Arabia lifted all restrictions and received more than 1.8 million pilgrims—close to pre-pandemic numbers.<sup>111</sup>

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*The annual Hajj pilgrimage to Saudi Arabia was the first major event in the region during the pandemic, but it returned to scale gradually.*

Saudi Arabia's gradual approach meant that it did not attract large numbers of international pilgrims until 2022, but it used this progression to consolidate its control of the entire Hajj process. Previously, pilgrims from non-Muslim-majority countries were allowed to arrange their own journeys, often through specialized travel agents, while those from Muslim-majority countries were subject to annual quotas. In the lead-up

106 Abbas Al Lawati, "The Hajj Is Back and Saudi Arabia Is Hoping to Cash In," CNN, July 6, 2022.

107 Motoko Rich and Ben Dooley, "Spectators from Overseas Are Barred from Tokyo Olympics," *The New York Times*, March 20, 2021; Karolos Grohmann, "Beijing Games to Allow Spectators Only from Mainland China," Reuters, September 29, 2021.

108 Jaffar A Al-Tawfiq, Rana F Kattan, and Ziad A Memish, "Escalating the 2022 Hajj during the Third Year of the COVID-19 Pandemic," *Journal of Travel Medicine* 29, no. 6 (2022): taac059; Jomana Karadshe and Tamara Qiblawi, "Unprecedented' Hajj Begins—With 1,000 Pilgrims, Rather than the Usual 2 Million," CNN, July 29, 2020.

109 Al-Tawfiq, Kattan, and Memish, "Escalating the 2022 Hajj;" Saudi Arabia General Authority of Statistics, "Hajj Statistics 1442 (2021)" (fact sheet, 2021).

110 Agence France-Presse, "Saudi Arabia to Ease COVID Restrictions, Allow 1 Million Hajj Pilgrims," *Times of Israel*, April 9, 2022.

111 Saudi Arabia General Authority for Statistics, "Hajj Statistics 1444 – 2023" (executive summary, General Authority of Statistics, Riyadh, Saudi Arabia, 2023).

to the 2022 pilgrimage, the government issued new rules subjecting all potential pilgrims to a lottery and launched a digital platform through which all bookings had to be made.<sup>112</sup> This has threatened to put the cottage industry of pilgrimage travel agencies out of business, and it is unclear whether it will save pilgrims money in the long run. Initial user reports from the United States indicated that the platform was buggy, difficult to navigate, and had inaccessible customer support.<sup>113</sup> This shift is linked to a wider, centralized push to attract tourism, including the Visit Saudi Arabia website and campaign and the creation of new visa options specifically for pilgrims conducting Umrah, another pilgrimage that can be made at any time of year.<sup>114</sup>

While Saudi Arabia loosened its Hajj entry policies progressively each year, the United Arab Emirates—and particularly the Dubai emirate—opened to international and inter-emirate travel much more swiftly.<sup>115</sup> Within the United Arab Emirates, Dubai's economy has relied more heavily on tourism and travel than the Abu Dhabi emirate. This resulted in Dubai reopening for tourism partially by mid-2020, compared with December 2020 for Abu Dhabi, which also imposed health requirements for longer than Dubai. Dubai's emphasis on tourism culminated in Expo 2020 (held October 2021–March 2022), which the government saw as an important part of its pandemic recovery.<sup>116</sup> Efforts to attract both domestic and international visitors included giving free tickets to Emirates Airlines passengers, providing days off for government workers to attend, and trying to reduce pandemic-related restrictions, ultimately requiring either vaccination or a negative PCR test for entry. Even with these testing or vaccination requirements, UAE tourism returned to near pre-pandemic levels during the expo, with the exception of January 2022, which saw a significant decrease likely caused by restrictions on entry from some countries due to the Omicron variant.<sup>117</sup> By contrast, tourist arrivals increased significantly in March 2022, the expo's final month.

By the time the World Cup came around in November and December 2022, the Gulf states had dropped most of their entry requirements, with Qatar doing so just before the tournament.<sup>118</sup> This was one of the final barriers to be removed to facilitate the regional, multi-entry approach needed for the event. Because of Qatar's small size and lack of sufficient hotel capacity, many fans stayed in Saudi Arabia or the United Arab Emirates and flew into Doha daily. The first barrier removed was the January 2021 resolution of the rift between GCC countries that had seen Saudi Arabia, the United Arab Emirates, and others blockade Qatar, including by suspending flights from these countries to Doha.<sup>119</sup> The second was easing visa requirements to allow constant cross-border travel, resulting in the creation of the Hayya card,<sup>120</sup> which served as a multi-

112 Liam Stack, "New Saudi Rules on Pilgrimages Upend a Rite for New York Muslims," *The New York Times*, July 12, 2022.

113 Fiona Andre, "New Hajj Booking Process Frustrates Many Foreign Pilgrims," *The Washington Post*, June 28, 2023.

114 Arab News, "Saudi Hajj and Umrah Ministry Launches 'Nusuk' Platform to Facilitate Pilgrim Procedures," *Arab News*, September 26, 2022; Jihane Rahhou, "Saudi Arabia Introduces New Visa Measure to Facilitate Umrah for Muslims," *Morocco World News*, December 19, 2022.

115 Each emirate has the power to set its own health requirements, meaning that the Dubai emirate could relax its health requirements more quickly than Abu Dhabi, thereby reopening to both international and domestic travelers.

116 James Reinl, "Expo 2020 Dubai a 'Catalyst for Hope' of COVID Recovery, UN Official Says," *The National*, September 28, 2021. By the end of the expo, government officials similarly touted the economic impact the event had on the country. See Emirates News Agency (WAM), "Expo 2020 Dubai Helped Accelerate Recovery from COVID-19 Pandemic: Thani Al Zeyoudi," *Gulf News*, April 5, 2022.

117 Crisis24, "UAE: Authorities Suspend Entry from Certain African Countries from Dec. 25 amid Concerns over COVID-19 Omicron Variant and Rising Case Numbers/Update 79," *Crisis24*, December 24, 2021.

118 AP News, "Qatar Drops Coronavirus Restrictions Just before World Cup," AP News, October 27, 2022.

119 Tariq Panja, "Qatar Faces a Tight Squeeze for Its Compact World Cup," *The New York Times*, November 14, 2019.

120 Al Jazeera, "What Is a Hayya Card and Why Do You Need It for World Cup 2022?" Al Jazeera, October 26, 2022.

entry visa to Qatar, Oman, Saudi Arabia, and the United Arab Emirates. This represented a marked shift in how these countries cooperated on travel and tourism. Although nationals of GCC countries often have certain rights to enter and remain in other GCC countries, this coordination has not typically extended to regional visa regimes or permits for nonnationals to enter multiple GCC countries. After the World Cup ended, Qatar extended the validity of the Hayya card and used its digital infrastructure to revamp the visa acquisition process, hoping to reap more tourism benefits and potentially establish a precedent for similar arrangements in the future.<sup>121</sup>

Despite these efforts, the World Cup did not attract as many visitors as projected, missing the mark by a few hundred thousand, and the regional approach did not necessarily bring the anticipated benefits to communities on the outskirts of the event.<sup>122</sup> It did, however, demonstrate the feasibility of hosting such global events in the region (as Saudi Arabia has emerged as the sole bidder for the 2034 men's World Cup)<sup>123</sup> and making it accessible to a wide range of fans. Looking ahead to the 2026 World Cup hosted across the United States, Mexico, and Canada, who can attend is likely to shift, given the complexities of the three countries' visa systems. Most important, the 2022 World Cup—along with Expo 2020 and the Hajj—demonstrated that with the right combination of vaccination rules, travel restrictions, and health requirements as well as political prioritization, large-scale tourist events can occur even during major health crises.

## 4 Moving Forward along Diverging Paths

The COVID-19 pandemic has helped crystalize the disparities in the MENA region between countries with high and low incomes and between countries with stable and unstable political systems and governance capabilities. The will and ability of some governments to respond effectively to the pandemic's mobility impacts has led to swifter recoveries, while for others, crises seem to continue compounding. This reinforces the need for diverse approaches to supporting and improving the MENA region's mobility and migration systems. Some countries are policy movers and shakers and can focus directly on these reforms, while others need much broader development and governance support. As countries march along these diverging paths, their progress will depend on their ability and the ability of partner countries and institutions to internalize the pandemic's lessons.

The pandemic has spotlighted three main areas where significant policy reforms remain necessary:

- ▶ **Labor markets and visa regimes.** Labor markets in the Gulf are going through a period of rapid change and are torn between their dependence on migrant workers (through both the kafala system and high-wealth immigration) and their ongoing efforts to nationalize their workforces. The pandemic underscored the precarity of economies that rely so deeply on migrant workers but do not fully protect and regulate their labor rights. As governments work to reform migration

121 Alexandra Evangelista, "Qatar Extends Hayya Card Validity for Visitors until January 2024," *The Peninsula*, January 30, 2023; Joelyn Baluyut, "Hayya Expanded, Application for Visa to Qatar in 4 Easy Steps," *The Peninsula*, April 17, 2023.

122 For example, the Saudi city of Al-Ahsa saw the World Cup as an opportunity to regain tourist traffic and cross-border trade with Qatar that it had lost during the blockade, but visitor numbers failed to recover. See Vivian Nereim, "Qatar's World Cup Showcases Renewed Ties with Saudi Arabia, But Scars Remain," *The New York Times*, November 30, 2022.

123 Paul MacInnes, "Saudi Arabia Confirmed as Sole Bidder for 2034 Men's World Cup," *The Guardian*, October 31, 2023.

policies to meet labor market needs, the success of these efforts will depend on building flexibility into systems in a way that benefits migrants as well as employers, so that future crises do not result in mass unemployment and strand thousands of migrants. Adding flexibility—such as allowing migrant workers to change jobs or remain in the country while looking for a new one, improving private-sector work conditions to close the wage gap with the public sector, and opening long-term residence to a broader array of individuals—would help achieve stated policy goals, and could also help soften the impact of the next mobility crisis. However, these reforms, particularly those guaranteeing greater rights to migrant workers, must see real progress in implementation before being deemed successful, as past reforms have tended not to move beyond paper and into practice.

- ▶ **Tourism and megaevent planning.** Tourism and travel play a central role in several MENA economies, and COVID-19 underscored that these sectors rely on well-managed mobility systems that are resilient to crises. Bolstered by the success of Expo 2020 in Dubai, the 2022 World Cup in Qatar, and successively larger Hajj pilgrimages, the Gulf’s relatively swift tourism recovery shows that the region’s mobility systems can adapt to account for external shocks. As the impacts of COVID-19 fade from public discourse, it is important that pandemic-era adaptations and lessons not be lost. Some of these innovations, such as the regional multi-entry visas used to facilitate the World Cup, could be adopted in the longer term. Others pandemic policies and their impacts, such as the choice to relatively quickly stop requiring costly quarantines, could inform contingency planning as this period shed light on the costs and benefits of different public-health interventions. This knowledge could also be used to develop a set of thresholds that could guide countries as they seek to resume travel more efficiently in future crises. In addition, sustained investment in tourism industries through periods of economic crisis have proven critical to ensuring that these sectors can rebound effectively. Yet these megaevents, notably the World Cup, were in part built on exploited migrant labor. As the region bids to host more events, and as tourism continues to recover, it will be essential to learn from the pandemic’s lessons on maintaining and safeguarding mobility and on the need to better protect migrant rights.
- ▶ **Responding to irregular migration.** The pandemic triggered important shifts in who was moving irregularly and to where, and many North African and Levantine countries saw increasing numbers of their own nationals leaving. But migration policy was slow to adapt to these trends simply because governments in the region lacked the capacities, resources, and political will to make the significant reforms needed to stop the exodus in the short term. As such, it is critical to see how the governments respond over the longer term, if at all. If they continue to rely on European funding for enhanced immigration enforcement, there will likely be little actual change in governments’ approaches to managing and preventing irregular migration.

The pandemic highlighted fundamental and varied mobility-related challenges in the Middle East and North Africa. But even beyond the three policy areas described above, there is a need for governments in the region to think more systematically about mobility and migration policy moving forward. The lack of coordination and cooperation within the region during the pandemic pushed countries’ diverging paths further apart, with some catalyzed to policy action by the crisis-induced disruptions while others largely stayed in place. However, if the region is to respond more swiftly and comprehensively to the mobility implications of the next public-health crisis, coordinated efforts to bridge this divide will be essential.



## About the Author

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