

A Robust Regional Economy for Improved Labour Market Outcomes

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Introduction

Understanding the future of work, as a start, requires a review of broad historical trends. While trends are heterogeneous across countries and time, they do provide a baseline from which to compare the development pathways of countries and regions. Two hundred years ago, the vast majority of workers were engaged in agricultural activities. Work was hard and the pay little. Advances in technology allowed people to leave the farm and join factories. Further advances in technology allowed people to leave factories for jobs in the service sector. Work conditions and pay improved, but work was often repetitive and uninspiring. This century will witness further technological advances that will reduce the need for work that can be done by robots and computers, freeing workers from mundane tasks and allowing them to engage in intellectually rewarding activities with better working conditions. Technology is also changing the nature of the workplace, providing increased flexibility for workers to define their own activities and set their own work schedules.

Of course, these broad historical trends mask difficult transitions and divergent regional experiences. In the process of increasing productivity and creating new employment opportunities, technological progress destroys jobs in the old economy, resulting in uncertainty and hardship for affected families and communities. Governments must collaborate with the private sector, workers' organizations and non-governmental organizations to introduce policies, programs, and systems to retrain individuals, support families, and help communities adapt and become more competitive. Countries and communities that isolate themselves from these trends will fall behind, experiencing lower rates of economic growth. Countries and communities that are open to these trends, but fail to adapt adequate policies and programs will also fall behind and potentially expose workers and their families to painful and prolonged transitions.

The economies of the Arab region fall into the latter category ⁽¹⁾. During the 1950s and 1960s, Arab countries adopted a government-led development model that gave the state a large role in directing transitions. However, instead of supporting the growth of a dynamic private

⁽¹⁾ This note uses the terms Arab and Middle East and North Africa (MENA) regions interchangeably to refer to countries covered in the ILO regions of Northern Africa and the Arab States. Data reported from other sources may have a slightly different country mix.

sector, as exemplified by the approach taken in several East Asia and European economies, most Arab governments increased the size of the public sector. While this model succeeded, for a time, in expanding educational attainment, increasing employment, and reducing poverty rates, it began to falter in the 1990s and 2000s as public demand for jobs and services outpaced the ability of governments to deliver. The Arab uprisings of 2011 were as much about government inability to keep its end of the social contract as they were about freedom and dignity. Country-level policy solutions to the region's economic problems have been advanced by many local and international actors, including prominent international organizations. However, while much knowledge has been produced, disseminated, discussed in policy circles and debated public forms, precious little has actually been implemented. Weak governance structures, inefficient bureaucracies, entrenched interests, and rent-seeking actors have grown around the region's development model making it difficult for the region's economies to adapt and change. What the Arab region needs are new systems and processes that can place it on a development path towards more robust socio-economic models.

This issue note examines the economies of the Arab region and prospects for developing robust economies that are able to take advantage of global trends and technological changes for improved employment outcomes. The note is meant to raise questions and to serve as a basis for discussion. It begins with an analysis of key employment challenges and outlines what it would take to promote a strong business environment for large-scale creation of decent jobs and equitable societies. It then touches on the plight of migrant workers and refugees. The note concludes with a list of questions and issues for further discussion.

The Employment Situation in the Arab Region

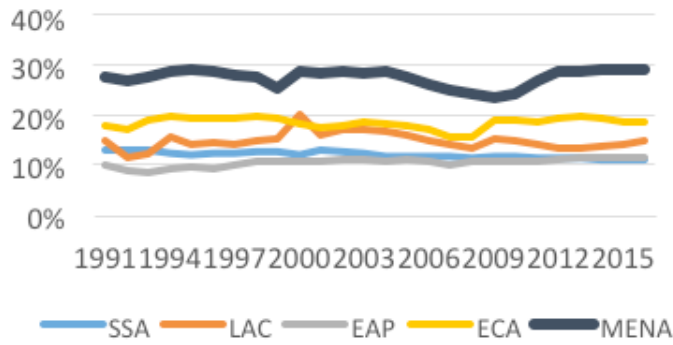
Like other regions of the world, the Arab region is struggling with a variety of economic and employment challenges, from dealing with the effects of globalization and technological change to adjusting to the pressures of global warming to tempering the volatility of global financial markets. In addition, the region's stagnating government-led development model has contributed to a segmented labour market characterized by a small formal economy and a large unregulated informal economy. Jobs in the formal economy have relatively decent wages and job security, but are scarce, covering only 40 per cent of total employment (World Bank, 2013). As a result, new labour market entrants queue up for jobs in the formal economy or work in an unregulated informal economy with lower wages, benefits, rights, and security.

New labour market entrants include youth who are leaving school and trying to find decent work in the public sector or formal private sector; women who prefer jobs in the regulated formal sector, but who face social barriers to participation and are not able to tap into social networks to the same degree as their male peers; and migrant and refugee populations that face legal and regulatory barriers to accessing decent jobs in host communities. This "insider/outsider" model of the Arab region has contributed to three phenomena: (1) persistently

high rates of youth unemployment and underemployment; (2) persistently low rates of female labour force participation; and (3) migrant and refugee populations that have not been able to integrate into the labour markets of host communities.

Challenge 1: Youth Unemployment and Underemployment

Figure 1: Youth Unemployment Trends

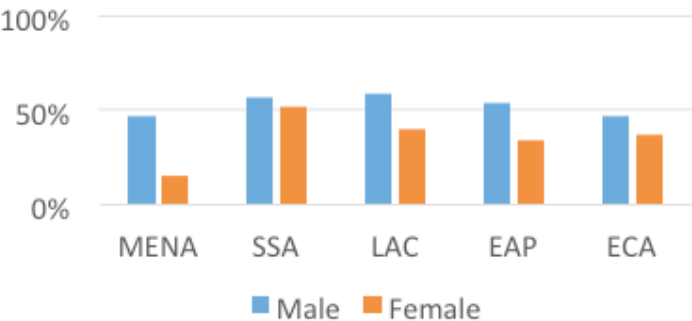


ILO, Trends (2017)

Arab youth experience prolonged periods of transition between school and work that can stretch for years (Dhillon and Yousef, 2009). This is partly the result of waiting for job opportunities in the formal sector. Other factors include education systems that fail to provide youth with the skills demanded in the labour market and strong family support structures that allow youth to prolong their job search. As a result, for more than a quarter century, the Arab region has witnessed the highest rates of youth unemployment in the world, reaching over 28 per cent in 2016 (Figure 1)⁽²⁾. Many youth, especially young women, drop out of the labour force altogether. Other youth undertake training to develop needed skills that they did not obtain in school. As a result, labour force participation rates among Arab youth are the lowest in the world, among both men and women (Figure 2).

⁽²⁾ Regions: Sub-Saharan Africa (SSA), Latin America and Caribbean (LAC), East Asia and Pacific (EAP), Europe and Central Asia (ECA).

Figure 2: Youth LF Participation Rates

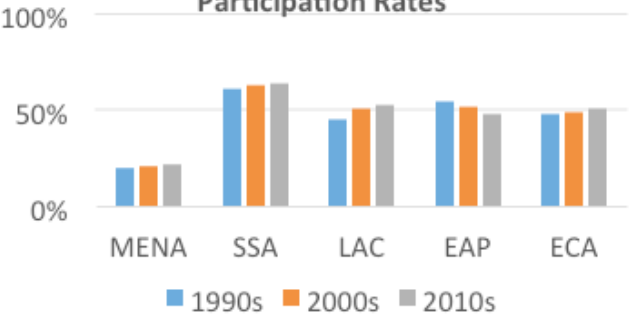


ILO, Trends (2017)

Delayed transitions affect Arab youth across the entire region. For example, in nearly all Arab States unemployment rates among young nationals are higher than the world average of 13 per cent⁽³⁾. Youth unemployment rates are also high in Arab countries experiencing armed conflict (such as Iraq, Libya, Syria, and Yemen) and in countries with large influxes of refugees (such as Jordan and Lebanon).

Challenge 2: Low Female Labour Force Participation

Figure 3: Female Labour Force Participation Rates



ILO, Trends (2017)

⁽³⁾ The one exception is Qatar, which has among the lowest youth unemployment rates in the world (less than 1% overall and 2.2% among Qatari nationals). This is due to its small population size and the absorption capacity of the public sector (MDPS, 2016).

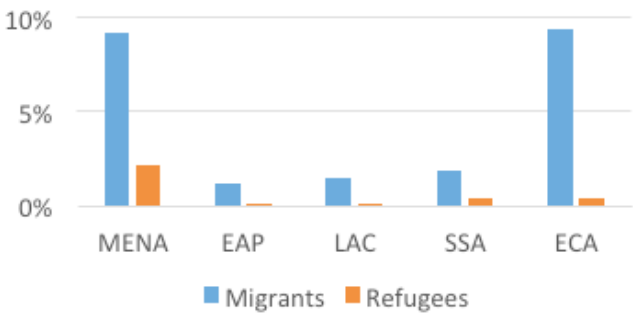
⁽⁴⁾ The one exception is Qatar which has female labour force participation rates of around 54% (ILO, 2017). However, this rate includes migrant workers. Female labour force participation among female Qatari nationals stands at only 36% (MDPS, 2016).

⁽⁵⁾ We use the term 'migrant worker' in this note in accordance with international norms. Governments in the Middle East tend to prefer to use the term 'temporary foreign contract labourers' or 'temporary expatriate workers'.

Another challenge facing the region is the persistently low rates of female labour force participation (Figures 2 & 3). Discrimination plays a role; employers in the Arab region tend to cite gender as a key factor in their hiring decisions. Even more important are family expectations and the work preferences of women themselves. These are governed by social norms that favor specific occupations in the public sector and formal private sector. In addition to higher wages and benefits, the formal sector offers better working conditions and a measure of social acceptability. Again, the issue is region-wide. Nearly every Arab country has female labour force participation rates that are lower than the world average of 50 per cent, and in some countries of the region the rate remains below 20 per cent (ILO, 2017) ⁽⁴⁾.

Challenge 3: Migrant Workers and Refugees

Figure 4: Shares of Migrants (2015) and Refugees (2014) in the Population



WDI (2017)

The Arab region is home to large numbers of migrant workers, reaching over 9 per cent of the population (Figure 4) ⁽⁵⁾. The Gulf States have the highest population shares of migrant workers in the world, reaching around 90 per cent in some States. Migrant workers in the region have limited rights and limited access to decent job opportunities, and are typically beholden to their employer through sponsorship mechanisms. The Arab region also has the highest population share of refugees and displaced persons in the world, reaching to over 2 per cent on an average, although in some countries of the region it has been considerably higher over the past few years. Refugees are often not able to access jobs in the formal private sectors of the Arab region, resulting in large deteriorations in their socio-

economic conditions. In addition, their lack of proper integration places enormous pressures on host communities as well.

Promoting a Strong Business Environment for Large-Scale Job Creation

A key component of the government-led development model in the Arab region is the primacy of public sector employment in the economies of most Arab States. The Arab region has relatively high shares of public sector employment compared to other developing regions. For countries with available data, the share of employment in the public sector ranges from 14 per cent in Morocco to 40 per cent in Jordan, with most countries having shares of over 25 per cent (World Bank, 2013). Excluding expatriate workers, countries of the GCC have by far the highest shares of public sector employment among their national population, reaching over 80 per cent in Qatar (Ministry of Development Planning and Statistics, 2016).

The high share of public sector employment is a legacy of a social contract that offered secure, high-paying government jobs to nationals who completed prescribed levels of schooling (World Bank, 2004). As a result, the Arab region went from having among the lowest levels of educational attainment in the developing world during the 1950s to among the highest within 50 years (Barro and Lee, 2000). However, over time, large numbers of educated workers were steered towards relatively unproductive government jobs. This has contributed to low rates of labour productivity growth of only 12 per cent between 1995 and 2015, the lowest of any region, as compared to a global average of nearly 50 per cent (ILO, 2016).

With most Arab countries suffering from a large public sector, future employment growth in the region must come from unleashing the job-creating potential of the private sector. A dynamic private sector would increase innovation and integration of technology into product development and service delivery. It would let innovative, disruptive small firms grow to create jobs with decent wages, benefits and working conditions. It would allow individuals to engage in market activities through technology platforms. It would encourage the development of public-private partnerships to undertake mega development and infrastructure projects. It would witness a multiplication of investment opportunities in the region. This vision of the future has been stymied by the region's government-led development model which has constrained the growth of the formal private sector and the creation of decent jobs. As a result, most workers in the region are employed in the informal economy in jobs with low wages, limited benefits, and minimal security. There are several channels through which this development model has limited growth:

- **Human resources:** The growth of public sector employment contributed to a crowding out of human resources, particularly university graduates. Instead of supporting innovation, growth and diversification in the private sector, many end up working in less productive government jobs.

- **Education:** The education systems of the region evolved to prepare students for national tests that serve as gateways to public sector jobs rather than to develop skills in demand in the private sector. The result is a system that perpetuates interest in and reliance on public sector jobs.
- **Finances:** Large government bureaucracies require a large public sector wage bill. To the extent that many of these jobs do not contribute to output, they divert financial resources away from private sector investments and reduce prospects for economic growth and job creation.
- **Overregulation:** the growth of government bureaucracies led to over-regulation of the private sector, constraining its ability to grow and create jobs. The average ranking of Arab countries in the 2017 Doing Business survey was 124 out of 190 economies (World Bank, 2017b).
- **Stifling Competition:** Governments allocate lucrative contracts to insiders leading to the spread of crony capitalism in the region. Large, well-connected, entrenched firms have an incentive to prevent the growth of potential competitors, further constraining the size of the formal economy.

Given the limited capacity of governments to hire and the limited amount of economic rents that can be captured in the private sector, supporting the growth of decent jobs in the formal sector requires a reduction in the size of the public sector bureaucracy and removal of barriers to the formation and growth of competitive firms. Policies are needed to lay the foundations for large-scale job creation and promotion of a strong business environment within Arab States that is capable of attracting foreign direct investment.

The prescriptions for reform include, first and foremost, addressing the size of the public sector, ensuring that public sector salaries and benefits align with those in the private sector, and reducing corruption and crony capitalism. In addition, governments should aim to address the following priorities for reform:

- Reducing barriers to starting a business, including registration costs and time and effort required to complete the process. Owners/managers of small firms often indicate that they do not register their firms because they cannot afford to take several weeks off work to complete the paperwork.
- Improving the legal environment and contract law, including mechanisms for enforcing contracts, resolving disputes, and improving bankruptcy laws. The uncertainty created by weak contract law and the time it takes to resolve disputes distracts from the business of growing a business.
- Access to credit is also a barrier to starting and growing a business, even in oil-rich Gulf States. This is ironic given the available wealth in the region searching for good investment opportunities. Governments can help to reduce information asymmetries that lie at the heart of the credit gap. Governments should also limit domestic borrowing so as not to crowd out the private sector.

- Finding workers with the right skills is a key challenge facing businesses in the region. Even though youth unemployment rates are high, vacancies are difficult to fill. Improving the quality of the education system, especially vocational education, to focus more on skills should be a top priority.

Despite reasonable clarity on what needs to be done, the region's track record on economic reform is weak at best, even in countries undergoing popular change. The reality is that attempts at reform will be met with resistance from entrenched interests and insiders who benefit from privileged access to economic opportunities. The result in many Arab countries has been economic paralysis. In addition to focusing on specific reforms, countries should develop processes that introduce change over time. Approaches include:

- **Social Labs:** One way of addressing intractable policy issues is by inviting and enabling a group of key stakeholders to explore and tackle them from novel angles using innovative approaches. Essentially, the group leads a process of change, often with the support of a key policymaker to improve take up. Examples from the region include the Forsati Acceleration Lab in Tunisia.
- **Transparent Processes:** A powerful tool for reducing over-regulation is to create a government office at a high level with a mandate to review and sign off on all new rules and regulations, work with government agencies to document all procedures in a clear and transparent manner, and revisit all existing rules and processes over time. One example is the U.S. Office of Management and Budget (OMB) and its application of the Paperwork Reduction Act of 1995, which requires that government agencies obtain OMB approval before requesting information from the public.
- **Nudge Units:** Encouraged by recent advances in Behavioral Economics and Social Influence, governments have begun introducing “nudge units” that aim to improve policy outcomes by introducing small changes in the choice sets of people and government agencies. For example, encouraging government agencies to replace approval processes with procedures for informing. Nudge units have been set up in several Gulf States; most are modeled after the UK example.

Promoting Decent Jobs and More Equitable Societies

Decent jobs are mainly supported through rules and regulations that apply in the formal sector. It is difficult to promote decent work when 60 per cent of the workforce is working in informal jobs. Thus, the first order of business in promoting decent work in the Arab region is to introduce policies that promote (and revisit policies that obstruct) the development and growth of the formal private sector.

Promoting the growth of the formal private sector can also help to address the gender gap in the region. Unemployment rates among Arab women are more than twice as high as among men (ILO Trends, 2017). This gap is by far the highest in the world. One contributory reason are conservative social norms. Mainly due to the unregulated nature and adverse working conditions of the informal sector, Arab women prefer to wait for job openings in the public and formal private sectors than to work in the informal economy. Furthermore, making it difficult for firms to join the formal economy results in less competitive formal sector firms, which creates opportunities for gender-based discrimination. Firms in competitive markets cannot afford the luxury of discriminating and instead focus on selecting the best workers for a job.

The next issue is ensuring that the jobs created in the formal private sector are decent jobs, with good working conditions, decent wages and benefits, and reasonable levels of jobs security and flexibility. Indeed, a large share of workers in the formal sector of Arab countries today are informal workers who do not have contracts (ILO, 2016). As in the past, appropriate laws and regulations need to be introduced and monitored and workers need to be able to organize to bargain collectively and hold management accountable. In addition, the new jobs also need to be aligned with the evolution of work and workplaces of the future. Several policy priorities can help promote decent jobs and more equitable outcomes:

Policy Focus 1: Education

Promoting decent jobs, preparing for the future of work, and creating more equitable societies requires improving the region's education systems. There is a mismatch between the skills that youth acquire in school and those in demand in the market. This skills gap will only widen as employers seek workers with cognitive and non-cognitive skills that enhance their productivity and their ability to adapt to changing circumstances. These include problem solving, creativity, teamwork, and critical thinking. The portable skills of workers should also be enhanced. In tomorrow's ever-changing technology landscape, the ability to learn and remain current is as important as entry-level knowledge. Unfortunately, schools in the region have focused on imparting knowledge, often through rote learning, rather than on developing skills. Employers in the region also need to communicate their skill needs more effectively. Governments, firms, and education and training providers should move towards a competency-based model that relies on clear skills assessments.

Comprehensive education reform has long been on the region's agenda (World Bank, 2008). In the future, the urgency of reform will only increase. Education systems need to anticipate and respond to the fast-changing needs of employers and the market. This requires introducing iterative processes of institutional assessments and reform at a relatively decentralized level. Devolution of decision making is not easily accomplished in the region. Arab countries should also take steps to promote lifelong learning, providing access to educational platforms and allowing individuals to obtain relevant education at various stages of their careers.

Policy Focus 2: Enhancing Mobility and Flexibility

The world is entering a period of rapid technological change, where robots and computers will continue to intrude on all aspects of work in every occupation. The future of work requires that workers are able to interact with technology, learn on the job, and adapt quickly to changes. Unfortunately, many public policies, corporate practices, and social norms of the past were created with stability in mind. Governments, firms, and support organizations need to adapt to the changing realities.

- **Focusing on Careers:** Governments and firms should support career advancement, rather than focus only on improving work conditions of specific jobs. Arab youth are finding it very difficult to access their first job, leading to prolonged periods of “waithood” (Dhillon and Yousef, 2009). Obtaining an entry level job with promising career prospects is even more important than many aspects of social protection, especially given the region’s strong family support structures.
- **Flexibility in Work:** Technological advances are making it easier for people to design their own work schedules and tailor their work experiences to meet their unique circumstances. Encouraging firms to introduce flexible working hours, allow telecommuting, and provide other flexible work arrangements would align with global trends and take advantage of technological advances. This would especially benefit women, many of whom prefer more flexible working conditions, and people with limited mobility, such as refugees and people with disabilities.
- **Diversifying Incomes:** Workers need to be able to diversify sources of income in order to manage change and uncertainty. In addition to their regular jobs, workers in developed economies are owning more equity stakes in companies and earning income from their assets, such as using their cars (Uber) or renting out extra space in their homes (Airbnb). Many are engaged in online trade (Ebay) or offering their skills through virtual platforms (Upwork). These opportunities are being increasingly pursued in developing countries as well. Diversifying income streams can help foster more equitable societies. Flexible policies are needed to allow such diversity to take place.

Policy Focus 3: Integrating Communities

As discussed in the opening paragraphs of this issue note, communities that fail to adapt to the technological changes taking place by introducing relevant policies and programs will fall economically behind and potentially expose workers and their families to painful and prolonged transitions. This is happening within countries of the Arab region and elsewhere. Technology is both an enabler, working to reduce differences at an individual level, and a disrupter, exacerbating differences at a community level.

Geographic disparities in global integration and adapting new technologies are increasing inequality between and within countries. This can be seen in the increasing economic disparities between rural and urban areas in some countries, or more broadly between poorer and richer communities in others. The next big conflicts in countries and regions, including

parts of the Arab region, that are characterized by high degrees of such inequalities, may thus well be about class.

Addressing this challenge requires, at a first stage, creating equal access to opportunities. This includes access to education, finance, markets, and other resources. Care must be taken to avoid unintended consequences. Subsidized higher education in the Arab region has mainly benefited the middle class, who are able to afford the private lessons needed to get the necessary grades on national tests to access the limited spaces in universities. Low income families are being increasingly marginalized and excluded.

Refugees and Migrant Workers

One of the key labour market issues facing the Arab region is the plight of refugees and migrant workers. Migrant workers are drawn to the region because of lack of opportunities in their home countries and promises of higher incomes and better lives for themselves and their families. While labour migration into the region has provided countless jobs and generated vast amounts of remittances, many migrant workers, especially low-skilled workers, fall victim to unscrupulous recruiters or abusive employers and find themselves struggling to pay off debts to intermediaries, having their passports withheld, or facing delays in payment of wages. Combined with legal dependence upon employers, and few viable avenues to raise grievances, these practices can result in situations akin to forced labour. In addition, refugees face legal barriers to employment in most Arab countries, and limited formal pathways to integration.

Sponsorship systems in the region (commonly known as kafala), impede internal labour market mobility by tying a migrant worker's residency status to an individual sponsor (kafeel). Under this system, migrant workers cannot resign from a job, transfer employment, nor (in some countries) leave the country without the employer's permission. While there is little expectation on the part of migrant workers and refugees in Arab countries of eventual full integration into host countries, much can be done to improve their circumstances. The first step is to note that migrant workers and refugees face problems at multiple levels and improving their situation requires addressing issues at all of them.

- **Home countries:** Most people would choose to stay in their home countries if they were able to earn a decent living there or avoid armed conflict. Thus, improving the economic and political circumstances of home countries and circumstances of the workers there is the place to start. Even for those who wish to migrate because of the pull of better opportunities, having options at home increases their bargaining position and improves their work conditions ⁽⁶⁾.
- **Intermediaries:** Many migrant workers, especially low skilled workers, find employment opportunities through recruitment agencies. These intermediaries often misrepresent the wages they will be paid and the work and living arrangements. These intermediaries should be subject to stronger regulation, experience rating, periodic reviews, and enforcement mechanisms (including suspension of licenses in cases of malpractice). They should also be supported with better tools, such as skills

⁽⁶⁾ Indeed, the first step of the ILO's Fair Migration Agenda is "Making migration a choice and not a necessity by creating decent work opportunities in countries of origin".

assessments, to help them better match workers with employers.

- **Employers:** most violations of rights occur through employers, from withholding passports to underpaying or delaying payment to placing unreasonable conditions on work. The situation is exacerbated with refugees who often are forced to work without the necessary permits and have little recourse for employer abuse. Countries need to be far more diligent in reducing the power of employers, monitoring workers' rights, eliminating common abusive practices (such as withholding passports) and providing access to credible and efficient grievance procedures that protect workers, even those working without a valid work visa or residency status.
- **Host countries:** countries must ensure that their laws and regulatory frameworks are supportive of migrant workers' rights and are internally consistent. In many countries employers are held responsible for infringements committed by migrant workers under their care. This creates a strong incentive for employers to limit the mobility of these workers. Host countries can also regulate intermediaries and help improve the matching process between employers and workers, such as by supporting skills assessments before workers migrate. Finally, Arab countries should adopt internal conventions on refugees and allow them access to employment opportunities and resources to earn a living as well as provide pathways to integration.

Questions and Issues for Discussion

This issue note argues that the current public sector-led development model of the Arab region will continue to limit Arab countries' ability to mobilize a dynamic and diversified formal private sector that is capable of generating decent jobs for the future. At the same time, this model is part of an intricate social contract which has, over time, led to a culture of patronage among key segments of the population.

- To what extent do people want to break with this social contract? Even with fewer opportunities, do workers prefer a second best development paradigm: taking a chance on securing a good job in the public sector or formal private sector rather than dealing with technology-driven change?
- How can countries balance the lowering of barriers to entry for youth, women, migrant workers, and other outsiders while protecting the livelihoods (if not the privileges) of older workers and insiders? What kinds of social safety nets should be developed in the future to support both groups?
- How can societies renegotiate the terms of the social contract? Can governments incrementally reform it or is it necessary to radically change the terms, for example by

changing the perception of public sector jobs as lifetime sources of patronage to temporary positions of public service?

Job creation in the Arab region will be driven by private sector development. The way in which the private sector develops and evolves will, in turn, define how technology is integrated into the jobs of the future. In addition, work needs to be done to ensure that workers of today are prepared for the jobs of tomorrow. New policies are needed to ensure that the jobs of tomorrow have decent wages, conditions and flexibility.

- How can governments remove barriers to the growth and development of new firms wielding disruptive technology while maintaining adequate safeguards to secure the wider public interest?
- How will the role of collective bargaining and unions evolve and adapt in the future of work? What role will they play in supporting the development non-traditional workers and workplaces? Will governments of the region allow an evolution of collective bargaining and union activity?
- What labour market policy alternatives are needed to support the growth and development of decent jobs in the future (career development, flexible work, income diversification, etc.)?
- What are the skill sets required for the jobs of the future? How can education systems be improved or reformed to ensure that students leave schools with the skills they need to succeed?
- What policy changes are needed to ensure that workers will be trained and empowered to master technology? What policy options can limit the adverse effects of technology change?
- What changes in policy and what kinds of now programming are needed to better prepare and integrate migrant workers and refugees into the jobs of the future? How can governments and the private sector be induced to provide adequate training and support to migrant workers?

Arab governments have a weak track record when it comes to implementing needed reforms. What is needed are systems that support a reform process using iterative approaches of assessments and action.

- When governments are unwilling and unable to introduce the necessary policy changes, what systems and mechanisms can be introduced to focus on a process rather than on outcomes?
- What international conventions do Arab countries need to ratify that are most relevant for the future of work? What mechanisms do they need to introduce to ensure their implementation?
- What are the roles of the private sector, workers' organizations, non-governmental organizations and international organizations in reform efforts? How can these roles be activated effectively?

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NOTES

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