



**Gulf Research Centre Cambridge**  
Knowledge for All

## Workshop 8

# **The Future of GCC Labour Market Reform: Towards a Multi-Disciplinary, Sustainable, Evidence-Based and Practical Understanding**

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### **Abstract**

Labour market reform increasingly represents the single biggest challenge for government, academic, and business leaders. Broadly, at a national level, policy makers are concerned with transforming the productivity of the local population into the future engine of economic growth, creating a more sustainable economic and social model, supporting greater economic diversification, social stability, improving job creation, employee engagement and well-being. Employers are impacted by the factors influencing supply, demand, and the cost of talent and how it would influence the productivity and positivity of their regional workforce. Finally, individuals living and working in the region are concerned with personal standards of living, how best to invest in their own human capital, their careers, quality and quantity of life, etc. These factors are all, in some way, dependent on the existing structure and future direction of reform of the labour markets of the region.

It is important to understand how to attract, develop, engage, and retain the growing numbers of job-seeking youth, females and other marginal groups, particularly amongst the region's local population. While government policies focus on promoting the prospects of the local population, changes to the role of nationals in the workplace, by implication imply changes to the role of expatriates too. Highly segmented labour markets and the significance and inconsistency of the role of government, both disproportionately as employer of choice for the majority of the local population and formulator of labour policy within the broader context of social and economic policies, is an aspect that needs to be studied. Reconsidering the role of education in the region with such a young and rapidly growing demography is key, in particular in promoting broader employability among graduates, helping them to navigate the transition from education to employment. Arguably, promoting self-awareness and the finding of meaningful work are critical.

An evidence-based approach is required, extending research to better understand how these issues interact with each other, without over-relying on analysis and practices conducted elsewhere. It is imperative to develop local solutions, focused on impact analysis of investments made by governments, employers, and individuals, where stakeholders work together (researchers and practitioners, governments & employers (PPP), educators and employers) in order to establish an integrated, multi-disciplinary approach (including economics, education, business, psychology, human resources, finance etc.). This workshop aims to take a lead in promoting such an approach and papers are invited accordingly.

In sum, although labour reform has been a priority in the region for decades, an increased sense of urgency now prevails to get it right this time. The advancement of the local population is at the very heart of the issue – in determining whether the region propels itself towards a demographic dividend or spins into a demographic disaster as it continues to pursue the transition to a post-energy mode of achieving social, economic, and work imperatives.

## **Description and Rationale**

Arguably, in the GCC today there is no area of policy formation and execution with a higher priority than increasing the effectiveness and efficiency of local labour markets. Put simply, labour market reform represents the single biggest issue for government, academic and organisational leaders (Jones and Punshi 2013). Broadly, at a national level, policymakers are concerned with transforming the productivity of the local population into the future engine of economic growth, creating a more sustainable economic and social model, supporting greater economic diversification and, social

stability, besides improving job creation, employee engagement and well-being. Employers are impacted by the factors influencing supply, demand and the cost of talent and how it would influence the productivity and positivity of their regional workforce. Finally, individuals living and working in the region are concerned with personal standards of living, their quality and quantity of life, where they live, how they get to work, where their kids go to school, etc. All of these aspects are in some way dependent on the existing structure and future direction of reform of the region's labour markets.

**Figure 1: Key Characteristics of the GCC Labour Markets**



From *Unlocking the Paradox of Plenty*, Jones & Punshi (2013)

Without doubt, the dominating factor moving forward is the unprecedented demographic growth forecast for the region. According to the World Bank (2014) “the dynamics of demography in the Arab Region have created some of the most intense pressures on labour markets observed anywhere in the post-World War II period.” At a time when most other populations in the world are in decline, the Arab world's population is expected to double by 2050 (UNDP 2010). A significant majority of the population is of working age, as a result of high fertility and immigration rates in the region. This ‘youth bulge’ has resulted in the most rapid growth of young people as a proportion of the region's population in recorded human history. Undoubtedly, this has far-reaching implications in terms of the region's economic, socio-cultural and political future. More than 60 per cent of the region's population are under the age of 30 years in the Arab World (IFC 2011), with this proportion at 50 percent within the GCC (United Nations,

Department of Economic and Social Affairs, Population Division, 2013; The Talent Enterprise research 2014).

Table 1

*Proportion of Youth Population to Total Population in the GCC by 2015*

<b>Country</b>	<b>Youth Population Under the Age of 30 by 2015</b>	<b>Total Population in 2015</b>	<b>% Youth Population</b>
<b>Bahrain</b>	673,000	1,360,000	49%
<b>Kuwait</b>	1,817,000	3,583,000	51%
<b>Oman</b>	2,550,000	4,158,000	61%
<b>Saudi Arabia</b>	15,867,000	29,898,000	53%
<b>Qatar</b>	1,023,000	2,351,000	44%
<b>UAE</b>	4228000	9,577,000	44%
<b>GCC</b>	26,158,000	50,927,000	51%

*Source: Research by The Talent Enterprise (2014); United Nations, Department of Economic and Social Affairs, Population Division (2013)*

The region has a compelling opportunity to tap into its demographic endowment due to its ‘youth bulge.’ However, having a young working age population is a necessary, but not a sufficient condition, for enhancing the productive capacity required to drive economic growth. Their energy and aspirations need to be channelled in the right direction in terms of developing their skills and providing positive and productive work opportunities (Jones & Punshi 2013). Further, even though the region is experiencing the most rapid growth in its young population, ironically it also has some of the highest and most persistent levels of youth unemployment in the world.

According to a recent report, “Young people (in the Middle East) are seeking to achieve the transition to adulthood, competing with a large cohort of peers to secure places in preferred educational fields and gain employment in scarce positions in the formal sectors of the economy. They are also trying to successfully reach other important milestones in the transition to adulthood, e.g. marriage and household formation. Over the past two decades, efforts to achieve these normative milestones have been increasingly met with growing frustration and failure, as evidenced most clearly by poor average outcomes in the region’s labour markets. In the future, such efforts will take place in the context of greater domestic political uncertainty and increased global economic dislocation” (World Economic Forum 2012). Moreover, in the longer term, the sustainability of current social and economic models may also be challenged by ecological developments and climate change, rendering many parts of the region “uninhabitable by 2100” (Pal & El Tahir 2015).

It is important to stress that youth unemployment is a global concern. Worldwide, young people are three times more likely than their parents to be out of work (*The Economist*, 2013). However, in contrast to global patterns, what is most concerning for our region is the nature of unemployment. In most parts of the world, the duration of unemployment is typically shorter for youth than for adults, reflecting the tendency of youth to move more frequently between jobs. In most MENA countries, youth unemployment appears to be the result of waiting for the 'right' job. During school-to-work transition in the Middle East, long periods of unemployment are common. To a large extent, this extended state of unemployment reflects a misalignment between the expectations of the younger generation and the quality of jobs available, the financial security available to wait for the ideal offer, as well as a historical preference to work in the public sector.

Another serious concern is that the region continues to face some extraordinary challenges with regard to motivating its young population. Compared to other parts in the world, nationals in the GCC report some of the lowest levels of workplace engagement or motivation, in contrast to their expatriate colleagues. Of all the age cohorts, younger nationals (those aged 25 to 34) have consistently reported the lowest levels of engagement for over three years at 40.1 per cent (Jones 2015). Further, a significant decline in engagement levels has also been reported for nationals under the age of 25 at 47.7 per cent (compared to 64 per cent in 2010) and 43.4 per cent for the 35 to 44 age group (which was at 49 per cent in 2010) (Jones 2015). These mediocre and falling levels of engagement among the younger citizens of the Gulf countries are highly counter-productive to growth and need to be addressed in earnest.

The message is clear. The region can no longer afford to take this generation for granted. As the recent past has demonstrated, a young, working age population that is uneducated, unemployed, lacking in employability skills or significantly disengaged is a recipe for social and economic volatility.

The increasing youth bulge is also complemented by rapid growth in the representation of women in the local workforce. Though recently developing from a lower base compared to global standards, more women are not only entering the formal labour market, but also participating for longer periods of time.

Another key feature is the highly segmented nature of the labour markets. The early exploitation of fossil fuel discoveries and the lack of capacity within nascent labour markets resulted in a massive inflow of foreign workers into the GCC. The monetary strength provided by the energy endowments over the subsequent decades allowed the reliance on expatriate workers to continue as a firmly established feature of the local

talent landscape, rather than a temporary stage of development. This is especially pronounced for the vast majority of jobs providing physical and service labour, along with a high proportion of more specialised technical and managerial roles. Remarkably, even today, of the world's twenty countries with the highest proportion of international migration, approximately half are in the Arab world (Malmberg 2013), with Qatar and UAE leading the tally.

Further, the public sector continues to dominate employment of national talent, with the private sector significantly lagging behind as the employer of choice for nationals. It is estimated that 72.3 per cent of all public sector jobs in the GCC are held by its citizens (Bunglawala 2011). As a result of the historically lower national population base, an oversaturated public sector, and the decades of reliance on imported labour, there are deeply entrenched cultural views about employment among the local population. Participation rates especially in the private sector among nationals are startlingly low. As an example in the UAE, a report released by the National Bureau of Statistics (*The National*, 2012) reported that only 19,874 Emiratis worked in the private sector at the start of 2012, constituting approximately 0.5 per cent of the sector's total workforce of nearly 3.89 million.

The region's strategic policy priority to transition from economic dependence on energy revenues towards 'knowledge-based economies' is an attempt to extend the avoidance of the 'curse of oil.' This phenomenon, more pronounced among developing countries which discover and exploit their natural resources before a more diversified economic development has been achieved, is at the very heart of how to unlock the 'paradox of plenty' within the region's labour markets. The idea that natural resources might be more an economic curse than a blessing began to emerge in the 1980s. In academic terms, the resource curse thesis, describes how countries rich in natural resources were unable to use that wealth to boost their economies and how, counter-intuitively, these countries had lower economic growth than countries without an abundance of natural resources. Numerous studies have shown a link between natural resource abundance and poor economic growth. This apparent disconnect between natural resource wealth and economic growth can be seen by looking at an example from the petroleum producing countries as a whole.

From 1965 to 1998, in the OPEC countries, per capita GNP growth decreased on average by 1.3 per cent, while in the rest of the developing world, per capita growth was on average 2.2 per cent. The economic travails of Venezuela, Nigeria, and others have demonstrated this thesis in action.

Nonetheless, this has not necessarily been the experience of the oil-exporting countries of the GCC, at least to date. According to a report from HSBC, the six GCC countries earned more from their oil and gas exports between 2010 and 2014 than from the previous 15 years combined which resulted in windfall fiscal surpluses. However, since last year, energy revenues have fallen steeply, are currently continuing to fall and are predicted to stay low for some time. With growing domestic per capita energy consumption in the GCC, along with prolific population growth, the policy imperatives of shifting from a dependence on such revenues as a means of supporting the current social contracts can only accelerate across the region. More importantly, in many ways, income inequality is continuing to rise considerably in the GCC countries, a key factor that contributed to the “Arab Spring” in 2011. Despite the GCC region being politically and economically stable, there are broader economic and political implications across the neighbourhood as well because of the increasing divide between the rich and stable GCC and an increasingly relatively unstable and poor Arab world in the Levant and North Africa as they continue to suffer from civil strife and the resulting economic and population dislocation. As the Middle East’s economic inequalities grow, the rich nations of the oil-exporting Gulf States should be all too aware of the risks of emerging as isolated enclaves of stability in a region of failing states. Interestingly, many of the nations of northern Europe have welcomed the resultant surge in refugees as a significant potential benefit to their long-term labour productivity, the benefits of which the GCC countries have currently largely excluded themselves from.

Most of the GCC countries have a 2030 Vision, in some cases this is a 2020 or 2021 Vision, which aims to transform their economies from one dependent on oil towards a ‘knowledge based’ economy. On the face of it, this should be achievable as the region uniquely has a young, growing and educated workforce combined with large public sector reserves and sovereign wealth funds with which to invest in their productivity. Indeed, the major macroeconomic characteristic shared by most of the oil-exporting GCC states is that they currently run large trade surpluses. As a result, they have accumulated substantial foreign currency reserves, which represents both a major ‘windfall’ opportunity and a historical challenge for their governments. The management of these currency holdings is the most significant challenge for policy makers. Converting them into domestic currency and spending them locally leads to an appreciation of the exchange rate and higher domestic inflation. Keeping them in foreign currency and managing through a sovereign wealth fund can prevent these problems but can contribute to global imbalances and a surfeit of liquid assets, creating asset bubbles wherever they are spent around the globe.

To meet the growing demands of accelerating population growth and to move towards a more diversified, competitive knowledge economy, the onus is now largely on the private

sector to create the estimated 85 million jobs by 2020 across the Arab world (International Finance Corporation 2011).

However, despite the stated demographic surplus and current availability of youth due to high levels of unemployment, one of the essential factors inhibiting employment of young nationals is that private sector employers believe that these people do not have the required skills for the workplace. These skills are often referred to as employability skills. Broadly, employability refers to a person's capacity to gain and maintain employment and meet changing job requirements. This necessitates employees or potential employees possessing the formal qualifications required for particular positions in the workforce, along with the other skills that employers are looking for in addition to formal qualifications.

Hence, the current education to employment system is not adequately aligned for most employers and young people, particularly in the Arab world. According to a global study (McKinsey 2012), less than half of the students (45 per cent) and employers (42 per cent) believe that the education system has prepared them for the workplace. Ironically, 72 per cent of educational providers believe that the students are adequately prepared for the workplace. However, students report that the relevance of their education to the job market is insufficient. Fewer than half of the students are confident that they would study the same subject, if they were given a choice again. Furthermore, most students need to wait six to twelve months to find employment and more than half are unable to do so in their chosen area of study (McKinsey 2012).

These same global trends are being witnessed locally, and arguably, the situation may be even more alarming. Only 22 per cent of young nationals believe their country's education system helped prepare them (or is preparing them) to find a job (Booz & Co. 2010). Only 29 per cent of GCC employers feel that education prepares students with necessary technical skills. Only 19 per cent agree that it prepares young people with the right attitude for work (EY 2014).

Hence, along with fostering formal education, there is a critical need to understand, assess, and foster psychological, employability, and life skills and a positive mindset among GCC youth, as these impact not just academic performance, but also future success, motivation, and performance at the workplace. This is crucial to support employability efforts in the GCC.

Taking into account the ongoing shift in demographics, positive indications of economic growth, and the experience of the region in the wake of the 'Arab Spring', organisations today are facing a unique employment environment. The broad-based demographic

pyramids forming across the region – a significant youth bulge, along with troubling levels of youth unemployment and incidents of socio-political strife – are fuelling a surge in formal and informal regulatory amendments to accelerate the participation of local talent in the labour market. There are also increasing efforts towards educational reform. However, from a long-term growth perspective and with visible skill gaps persisting, labour markets continue to depend on foreign workers to take on both white collar and blue collar jobs which the local talent supply is currently unable or unwilling to perform. Thomas Piketty (2013) predicts the continued relative diminishing of the global value of labour compared to capital across twenty-first century labour markets. However, at this point in the GCC, real wages are high and increasing, on average, both for GCC nationals and some categories of expatriates. Rather than the price of labour, it is the value of labour which is the primary lacunae in the region's labour markets. Pride, the honour of work, the focus on personal contribution remains deficient.

Satisfying the need to provide genuine, positive, and productive work for the legions of young men and women projected to enter the workforce over the next decade and beyond is now more urgent than ever before. If we are all to leave a lasting legacy of positive change and contribute to a future for the region which is fuelled by people versus energy endowments, we all have to commit ourselves to both understanding more about the uniqueness of the GCC's workplaces and to wholeheartedly adopting genuinely new approaches to fully address the opportunities and challenges which present themselves to us in our daily work as policy makers, educationists, organisational leaders, human capital experts and the larger workforce. A multi-disciplinary, integrated approach is required to address each facet of these issues, which collectively represent what is arguably the single biggest challenge and opportunity for the century ahead, even more so than the more manifest security and ecological issues which typically dominate the headlines. From a positive perspective, all the ingredients are in place: The question is, can we collectively get the recipe right?

We need an evidence-based approach, extending research to better understand how these issues interact with each other, and without relying on analysis and practices conducted elsewhere, often with limited success. We need to focus more on a sustainable impact analysis. It is imperative to develop local solutions, where stakeholders work together (researchers and practitioners, governments and employers (PPP), educators and employers) to establish an integrated, multi-disciplinary approach (including economics, education, business, psychology, human resources, finance etc.). This workshop aims to take a lead in promoting such an approach.

This workshop intends to highlight the impact of the emerging demographics in shaping not only the social and economic, but also the broader social, cultural, and political future

of the Arab world. With the youngest population profile in the world and the largest and most accessible global energy reserves, the security and success of the region's economies is a critical issue for the world. The events of the Arab Awakening over the past couple of years or so have only served to highlight the importance of understanding more about the potential demographic dividend which the region could harvest, if it were able to combine effective investments in human capital, along with its undoubted financial endowments and capacity to build its physical infrastructure. Although the development of local or national talent has been a priority for decades, an increased sense of urgency now prevails to get it right this time. The advancement of the local population is at the very heart of the issue – in determining whether the region propels itself towards a demographic dividend or spins into a demographic disaster.

It is manifest that the region is at a decisive crossroads in terms of labour market reform and the way ahead is not certain. Critical and courageous choices have to be made by the leaders of these nations, by policy makers, organisational leaders, and individuals in terms of how best to harness the positive productive potential of this population surge. This is a dramatic juncture in the development of the Middle East and the success achieved over the next decade will be critical in determining the talent landscape of the future, and in turn, the sustainability of the current economic, social, and political structure of the region. Some of these decisions may significantly alter the composition of the labour market and have far reaching, longer term consequences on the socio-cultural fabric of the society. The increased mobility and employment of local women in Saudi Arabia is an often cited as a key step in this direction; however, there are many more such decisions in terms of the employment and productivity of the local workforce combined with a continued dependency on importing foreign talent that need to be re-evaluated in earnest.

One thing is clear: our collective future in this region will be dramatically different to what is being witnessed today because of the scale and pace of change that is unprecedented in the region's history. In fact, the transformation has already begun. It may be slower and more subtle than the dramatic changes being experienced elsewhere in the post-recession world, but labour market changes in the GCC will be more seismic and far reaching than we have ever experienced before. Understanding how to navigate this revolutionary change will be instrumental in ensuring that we reap the demographic dividend in order to unravel the paradox of plenty.

### **Anticipated Participants**

- Research studies and case studies on evidence-based policy making towards informing, evaluating, and accelerating labour market reform

- Review and synthesis of evidence-based literature and practices to inform and develop actions which address key labour market concerns and challenges
- Collaborative research, projects, initiatives and impact analysis between key stakeholders on addressing labour market issues
- Multi-disciplinary/inter-disciplinary approaches to addressing labour market issues across the GCC, sharing best practices, and enhancing the efficacy of reform across the region.
- Outline of policy frameworks towards enhancing labour market outcomes for GCC local populations; defining nationalisation 2.0
- Understanding the current and future challenges and opportunities of expatriation
- New perspectives on addressing the structural elements, including reducing the current segmented nature of GCC labour markets and tackling the rent-seeking behavior in the region's workplaces
- Analysing and anticipating the changing talent landscape towards the future of work in the region
- Practical case studies and evidence-based papers which demonstrate the pragmatic experience of the implementation of programs and initiatives towards education and labour market reform in practice
- Studies on the impact of global discourses on equality and human rights and their impact on labor market policy and regulation
- Experiences of managing diversity in the workplace

## **Workshop Director Profiles**

**David Jones** is the Co-Founder and Managing Director of The Talent Enterprise, a premier human capital 'think' and 'do' tank, focusing on creating employability, talent development, and leadership solutions for the MENA region, with a key emphasis on local talent development, youth and female inclusion. Having lived and worked in the GCC for almost 20 years and with a background in labour market economics, David is a senior advisor to policy makers and organisational leaders on strategic human capital issues and challenges. Previously, he was the Chief Consulting Officer for Aon Hewitt for the MENA region. In this role, he advised clients on a wide range of people challenges and directed the development of the firm's evidence-based consulting. Mr. Jones led the growth and delivery of the entire spectrum of talent solutions and worked on some of the largest human capital projects in the region. He also directed the research efforts of the firm, including Qudurat – the largest workplace research study to date, as well as the Best Employer research and formation of the regional People Risk Index. Prior to this, he held senior HR leadership roles at Emirates Group, Dubai Civil Aviation, and KPMG.

Mr. Jones is a regular lecturer at universities including the University of Cambridge, the European School of Management and Technology in Berlin, and the University of Bradford. He is a frequent speaker at conferences across the world as well as a regular commentator in the regional media. He is the co-author of the best-selling book titled “Unlocking the Paradox of Plenty – A Review of the Talent Landscape in the GCC.” In addition, his latest publications include a new book on women in the Arab World titled “Game-Changers” by Motivate Books, edited chapters in books entitled “Employment and Career Motivation in the Arab Gulf States: The Rentier Mentality Revisited” by Gerlach Press and “The Political Economy of Wasta: Use and Abuse of Social Capital Networking” by Springer Publications, as well as other key publications in academic, business journals, and magazines.

**Dr. Sofiane Sahraoui** is President of the Arab Governance Institute which he co-founded in 2012. He is currently Senior Advisor in charge of consulting and research at the Institute of Public Administration of Bahrain (BIPA). Prior to joining BIPA in 2009, he held several faculty and academic administration positions in Bahrain, and the United Arab Emirates. He is also an Associate Research Fellow at Brunel Business School in the UK. Dr. Sahraoui led the foundation of the MENAPAR (Middle East & North Africa Initiative for Public Administration Research) initiative and has been elected as its Director of Research. He sits on the Board of Management of the International Association of Schools and Institutes of Administration (IASIA) and is its Vice-President for the MENA region. He co-chairs its working group on “Governance & Public Policy.” He was elected to be the General Rapporteur of the 2013 Congress of IIAS/IASIA, one of the largest conferences in Public Administration in the world and has facilitated a workshop during the UNDESA public service awards summit in 2013.

Dr. Sahraoui holds a Ph.D. domestically and internationally from the University of Pittsburgh (Katz Graduate School of Business), MSc. from the University of Oxford (College of St Anne’s) and an undergraduate degree from the Institut des Hautes Etudes Commerciales (IHEC) in Tunis. His research is primarily on governance and organisational design. He has published two books and more than 40 research articles in leading academic journals and conference proceedings and speaks regularly at international professional gatherings. He was the guest editor of the prestigious European Journal of Information Systems and serves on the editorial board of many journals including Transforming Government: People, Process, and Policy. He holds regular seminars and workshops on higher education governance as part of his consulting activities and serves as auditor for a number of quality assurance agencies and as such regularly participates in institutional accreditations and program review visits. As a consultant for ANQAHE (Arab Network for Quality Assurance for Higher Education), he

developed a UNESCO-funded study on quality assurance of higher education in the Arab region.

## **Selected Readings**

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