

# Geopolitical Shifts in Qatar: Impacts on Expatriate Labor Inflows

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# 1. Introduction

## 1.1 Overview of Qatar’s Expatriate Labor Market

Qatar’s unparalleled economic growth has been underpinned by its reliance on expatriate labor, which, according to the latest statistics, accounts for approximately 89.5% of the population, reflecting a steady increase in reliance on foreign workers for critical economic functions (NPC. n.d., Sukoco. 2024). This workforce is vital for the nation’s economic goals, driving industries such as energy, construction, healthcare, and technology (Sweeney. 2024). As the world’s top exporter of liquefied natural gas (LNG), Qatar has invested heavily in infrastructure projects, including those developed for the successful hosting of the 2022 FIFA World Cup, which showcased the nation’s capacity for innovation and large-scale planning, while setting the stage for continued economic diversification (Bloomberg. 2024). The labor market in Qatar is governed by the Qatar Labor Law, which has undergone significant reforms in recent years. These reforms focus on improving worker mobility and autonomy, including the elimination of exit permits for most workers (Abdullah. 2014, ILO. 2024, Sweeney. 2024, GCO. 2025). In August 2023 alone, over 153,000 workers successfully transferred to new employers, showing the continued implementation of these reforms (Salari. 2023). According to the IOM’s World Migration Report 2024, migration is a global phenomenon where the majority of people move within their own countries. However, international migration patterns are diverse, with a considerable proportion of individuals migrating for work, family, or education (IOM. 2024).

**Table 1. Sector Reliance on Expatriate Workforce**

Sector	Expatriate Workforce Share (%)	Key Dependence
Energy	70 %	Skilled operations in LNG and oil
Construction	85 %	Infrastructure and mega projects
Healthcare	60 %	Nursing and specialized medical staff
Technology	75 %	ICT and digital transformation roles

**Reference Source:** Based on content from "Sweeney. 2024" and "GCO. 2024" on reliance on expatriates for economic goals.

Building on previous research utilizing Qatar’s Labor Market Information System (LMIS), this report integrates newly segmented internal data from the Ministry of Labor to provide deeper insights into expatriate workforce dynamics. While the early chapters rely on publicly available labor statistics and macro-level indicators, the latter sections draw on LMIS data to analyze workforce behavior in greater depth - enabling more precise evaluation of reform impact, job mobility, and crisis resilience. The dataset includes detailed information on tenure, one-year retention rates, and regional and sectoral transition patterns across reform phases - offering a sharper and more policy-relevant view of workforce behavior than publicly available sources.

This internal data strengthens the report’s ability to analyze how recent labor reforms have affected different segments of the expatriate population. It reveals, for instance, declining retention rates among high-income workers, region-specific salary structures, and functional segmentation across nationalities. By aligning public trends with these operational insights, the report presents a more targeted and actionable understanding of Qatar’s evolving labor market.

## 1.2 Significance of Geopolitical Developments

Global and regional geopolitical developments, such as the 2017 Gulf Diplomatic Crisis and the COVID-19 pandemic, have disrupted labor mobility and reshaped Qatar’s expatriate workforce dynamics. These disruptions necessitated strategic labor policies to ensure economic resilience, as outlined in Qatar’s Second National Development Strategy 2018-2022 (PSA. 2018). Simultaneously, international trends like Brexit and shifts in U.S. immigration policies have made Qatar a destination for skilled labor seeking stability, a trend highlighted in the IOM’s World Migration Report 2024 (IOM. 2024). Qatar’s growing role as a mediator in regional conflicts, has enhanced its stability and attractiveness to expatriates (Middle East Council on Global Affairs. 2023). This, combined with its strategic foreign policy of maintaining relations with both Western and Eastern powers, has ensured a steady influx of labor, reinforcing its position as a secure and prosperous destination (Cafiero 2022).

## 1.3 Interplay Between Geopolitical Events and Qatar’s Labor Market

This report examines how geopolitical shifts have directly influenced expatriate labor inflows into Qatar, focusing on migration trends, policy adaptations, and future challenges. Geopolitical events such as the 2017 Gulf Diplomatic Crisis and the COVID-19 pandemic disrupted global labor mobility, leading to a temporary decline in expatriate inflows to Qatar. However, the

country's strategic response, including labor market reforms and diplomatic mediation, has since restored and even enhanced its attractiveness to foreign workers (PSA. 2018).

The introduction of Law No. 12 of 2024, which removes exit permits for most workers and promotes job nationalization, has significantly improved Qatar's appeal as a destination for expatriate labor (NATLEX. n.d.). These reforms align with the Third National Development Strategy (NDS3) 2024-2030, which aims to balance the reliance on expatriate labor with increased Qatari participation in the private sector (NPC. 2024). For instance, the Ministry of Labour's Workforce Strategy 2024-2030 emphasizes attracting high-skilled expatriates while ensuring skill development for Qatari nationals, creating a more dynamic and competitive labor market (GCO. 2024, Al-Kuwari. 2024).

Qatar's growing role as a mediator in regional conflicts has further enhanced its stability, making it an attractive destination for skilled labor seeking security and prosperity (Middle East Council on Global Affairs 2023). This aligns with the IOM's World Migration Report 2024, which highlights the growing importance of migration for economic stability in the face of global systemic shifts (IOM. 2024). By leveraging these strategic reforms and geopolitical advantages, Qatar is well-positioned to address future labor market challenges and sustain its economic growth.

## 2. Labor Migration in a Geopolitical Context

### 2.1 Traditional Expatriate Labor Corridors

#### 2.1.1 South Asian Labor Dominance

South Asian expatriates, primarily from India, Nepal, Bangladesh, Pakistan, and Sri Lanka, form the backbone of Qatar's labor force, particularly in construction, hospitality, and domestic services. This group is driven by economic opportunities and remittance potential, with many workers prioritizing job availability and competitive wages. According to the Qatar University Social and Economic Survey Research Institute (SESRI), these nationalities collectively accounted for nearly 50% of the foreign workforce prior to 2017, underscoring their critical role in Qatar's economic development (SESRI. 2019). Policies ensuring fair wages, improved working conditions, and access to grievance mechanisms are key to retaining this workforce.

- **Key Characteristics:** High reliance on remittances, focus on job availability, and competitive wages.
- **Policy Implications:** Fair wages, improved working conditions, and access to grievance mechanisms.

#### 2.1.2 Arab Professionals in Middle- to High-Skilled Roles

Arab professionals, particularly from Egypt, Jordan, and Lebanon, occupy middle- to high-skilled positions in sectors such as construction management, finance, education, and government advisory roles. This group values career advancement opportunities, professional recognition, and cultural familiarity. For instance, Egyptian professionals have historically played a key role in Qatar's healthcare and education systems, while Lebanese expatriates are prominent in finance and media (Gulfcareers. 2023, PwC. 2022). Qatar's economic diversification efforts and inclusive policies have further attracted skilled Arab professionals, with companies like Qatar Energy and

Hamad Medical Corporation actively recruiting them for their expertise and cultural familiarity (Careerical 2025). Retention strategies for this group include offering leadership roles, professional development programs, and competitive benefits.

- **Key Characteristics:** Career advancement, professional recognition, and cultural familiarity.
- **Policy Implications:** Leadership roles, professional development programs, and competitive benefits.

### 2.1.3 Western Expatriates in Specialized and Executive Roles

Western expatriates from the United States, the United Kingdom, Canada, Australia, and parts of Continental Europe typically fill specialized or executive-level positions in sectors such as energy, technology, finance, and academia. This group prioritizes high salaries, career growth opportunities, and a high standard of living. Qatar's initiatives, such as Education City and the Qatar Science & Technology Park, have bolstered its reputation as a global hub for innovation and research, attracting Western professionals seeking advanced career opportunities (Almoli and Tok. 2020).

Retention strategies for this group include competitive expatriate packages, tax-free income, and access to cutting-edge research and innovation projects. For example, Qatar's focus on digital transformation and renewable energy has created demand for Western expertise in emerging fields like artificial intelligence and sustainable energy (Domat. 2025). Additionally, long-term residency permits and investments in high-quality infrastructure further enhance Qatar's appeal to this demographic (Ibrahim and Shirazi. 2021)

- **Key Characteristics:** High salaries, career growth, and a high standard of living.
- **Policy Implications:** Expatriate packages, tax-free income, and innovation opportunities.

### 2.1.4 Labor Demand Driven by Infrastructure and Service Sector Expansion

Qatar's reliance on foreign labor is closely tied to its large-scale infrastructure projects and service sector expansions. The development of FIFA World Cup stadiums, metro systems, and urban infrastructure has driven demand for construction workers, while the growth of hospitality and tourism has increased the need for service staff (MarkWide Research. 2025). Initiatives like Education City and the Qatar National Research Fund have also attracted high-skilled expatriates to support Qatar's knowledge economy, particularly in renewable energy, AI, and logistics (PwC. 2024).

Retention strategies for this workforce include ensuring safe working conditions, providing skill development programs, and offering competitive wages. The Ministry of Labour's Workforce Strategy 2024-2030 emphasizes labor productivity and improved employment policies, while Qatar's focus on sustainability and green initiatives creates additional opportunities for skilled labor (GCO. 2024, Fassatoui. 2024).

- **Key Characteristics:** Job availability, skill development, and competitive wages.
- **Policy Implications:** Safe working conditions, skill development programs, and competitive wages.

## Table 2. Regional Contributions to Qatar's Workforce

Region	Contribution (%)	Significance
South Asia	50 %	Core in construction and domestic work
Sub-Saharan Africa	20 %	Emerging source, focused on ICT and healthcare
Western Countries	15 %	High-skilled roles in technology and academia
Middle East	10 %	Skilled professionals in healthcare and finance

**Reference Source:** Content from "SESRI. 2019" and "Murimi. 2024" on South Asia and sub-Saharan Africa as dominant labor sources.

## 2.2 Effects of the 2017 GCC Diplomatic Crisis

The 2017 blockade by Saudi Arabia, the UAE, Bahrain, and Egypt against Qatar remains a pivotal episode in modern GCC relations. Enacted on June 5, 2017, it cut diplomatic ties and restricted land, air, and sea routes, causing several immediate shifts in Qatar's labor market and economic strategies (GCO. n.d., Al Jazeera Centre for Studies. 2017):

- **Decline in Labor from Blockading Countries:** Egypt's substantial expatriate community in Qatar had traditionally filled both blue-collar and professional roles in sectors such as education, healthcare, engineering, and media. Once the crisis began, uncertainties regarding political tensions and logistical or visa hurdles slowed new arrivals from blockading countries. This disruption forced Qatar to seek alternative labor sources to mitigate the impact on critical sectors (Umar. 2023).
- **Reinforced South Asian Corridors:** Facing potential labor shortages, Qatar expanded its recruitment efforts from South Asian countries such as India, Nepal, Pakistan, and Bangladesh. These nations became the primary source of labor for Qatar's infrastructure projects, ensuring that initiatives like the FIFA World Cup 2022 preparations and urban development were not significantly derailed (Umar. 2023, Morgan et al. 2012).
- **Emergence of New African Corridors:** With borders closed by GCC neighbors, Qatar pursued recruitment in sub-Saharan Africa, particularly from countries like Kenya, Ethiopia, and Ghana. Although these new labor corridors were smaller in scale compared to the established South Asian networks, they helped Qatar diversify its labor sources and reduce dependency on traditional markets (Refworld. 2017, Atlantic Council. 2017).
- **Increased Cooperation with Turkey and Iran:** Qatar's closer economic and political relationships with Turkey and Iran led to modest increases in skilled and semi-skilled Turkish workers, particularly in project management, engineering, and specialized services. This cooperation not only addressed labor shortages but also strengthened Qatar's strategic alliances in the region (Miller 2024, Kabbani. 2021).

Through diversification and forward-looking policies, Qatar largely prevented severe, long-lasting labor shortages. However, some early disruptions caused delays in projects already on tight timelines, highlighting the challenges of adapting to sudden geopolitical changes (Umar. 2023).

## 2.3 Impact of Global Policy Shifts

Qatar's labor market is significantly influenced by global political and economic trends, which shape the flow of skilled and unskilled labor into the country. These trends include changes in immigration policies, geopolitical conflicts, and global health crises:

- **Changing U.S. Immigration Regimes:** Fluctuations in U.S. immigration policies, such as travel bans and stricter visa requirements, have led Middle Eastern professionals and students to consider Qatar and other GCC states as alternative destinations. The tightening of H-1B visa programs and increased scrutiny on student visas have redirected skilled talent to Gulf countries, which offer competitive salaries and stable employment opportunities (Federal Register. 2024). Qatar's inclusion in the U.S. Visa Waiver Program in 2024 further enhances its appeal, facilitating easier travel and business exchanges (Federal Register. 2024). Additionally, Qatar's focus on workforce empowerment and economic diversification has created demand for skilled professionals in sectors like technology and finance, positioning it as a viable alternative to the U.S. (SHRM. 2024).
- **Brexit:** The UK's decision to leave the EU in 2016 created uncertainty for EU nationals, particularly regarding employment and residency rights. This has led some British and European professionals to seek opportunities in Qatar, especially in finance, consulting, and academia. Qatar's tax-free income, expatriate-friendly policies, and stable economy make it an attractive alternative (Al Jazeera Centre for Studies. 2022). Initiatives like Education City and the Qatar Science & Technology Park further enhance Qatar's appeal as a hub for innovation, attracting skilled professionals from the UK and Europe (Team QT 2024). Recent reforms in residency and labor policies also strengthen its position as a preferred destination (The Peninsula Qatar. 2023).
- **Middle East Conflicts:** Ongoing conflicts in Syria, Yemen, and Libya have caused large-scale displacement, with many skilled migrants choosing Qatar for its stable economy, higher wages, and expatriate-friendly policies. This has enriched Qatar's labor pool, particularly in healthcare, engineering, and education (The Peninsula Qatar. 2025b). Qatar's initiatives, such as Education City and the Qatar National Research Fund, have attracted skilled professionals from conflict zones, supporting its transition to a knowledge-based economy (The Peninsula Qatar 2025a). Additionally, long-term residency permits and competitive benefits have strengthened Qatar's appeal as a destination for skilled labor.
- **COVID-19 Pandemic:** The COVID-19 pandemic disrupted foreign labor mobility in Qatar, particularly in construction and hospitality. Qatar's proactive measures, including health screenings, vaccinations, and support for migrant workers, ensured a gradual recovery (Global Investigative Journalism Network. 2021). Free testing, vaccinations, and training programs helped maintain labor market resilience (Anani. 2024).

## 2.4 Additional Regional Tensions and Implications

Political volatility in the Middle East, such as unrest in Lebanon and diplomatic disputes, has ripple effects on Qatar's labor market. While skilled workers from unstable regions often seek opportunities in Qatar's stable economy, new conflicts or tensions can disrupt established recruitment pipelines. For example, the 2017 GCC diplomatic crisis highlighted the need for



Qatar to diversify its labor sources and strengthen regional partnerships to mitigate such disruptions (Welle. 2025).

To address these challenges, Qatar has implemented proactive measures, such as expanding recruitment from sub-Saharan Africa and South Asia, and maintaining robust labor agreements with key partner countries. These strategies ensure labor market stability and reduce dependency on any single region (THE ASSOCIATED PRESS. 2025).

## 3. Government Responses and Policy Adjustments

### 3.1 Diversification of Labor Sources

Diversifying labor sources is a cornerstone of Qatar's strategy to mitigate geopolitical risks and ensure workforce stability. Recent agreements with Kenya, Ethiopia, and other African nations have been instrumental in expanding Qatar's labor pool, particularly in sectors like ICT, healthcare, education, and infrastructure. For example, the 2024 agreement with Kenya aims to triple the number of skilled Kenyan workers in Qatar, targeting key sectors and ensuring fair treatment and protection for workers (Murimi. 2024, Babassa. 2024).

Qatar's foreign policy also emphasizes attracting and retaining expatriate labor from diverse global regions, including South Asia, sub-Saharan Africa, and Europe. This approach not only addresses labor shortages but also strengthens Qatar's position as a global hub for skilled professionals. Initiatives like the Qatar Visa Centres and the National Strategy for an Effective and Highly Productive Workforce (2024-2030) further support this goal by streamlining recruitment processes and enhancing labor market efficiency (GCO. 2025, Qatar Tribune. 2024).

These efforts underscore Qatar's commitment to creating a stable and inclusive environment for expatriate workers, ensuring the country's continued economic growth and development.

### 3.2 Visa Reforms and Labor Rights Enhancements

Recent reforms have strengthened Qatar's labor environment:

- **Introduction of a universal minimum wage:** In 2021, Qatar introduced a non-discriminatory minimum wage of QAR 1,000 per month, with additional allowances for accommodation (QAR 500) and food (QAR 300) if not provided by the employer. This reform applies to all workers, including domestic workers, and is periodically reviewed to ensure it meets living standards (MADLSA. 2020, Human Rights Watch. 2024).
- **Revisions to the Kafala system:** Qatar abolished the No-Objection Certificate (NOC) requirement in September 2020, allowing workers to change jobs without employer permission after completing their contracts. This reform enhances labor mobility, though challenges like delayed documentation and lack of awareness persist (MADLSA. 2020, Qarjouli. 2021).
- **Streamlining visa processes through Qatar Visa Centers:** Qatar has established 20 Visa Centers in key labor-sending countries (e.g., India, Nepal, Bangladesh) to streamline recruitment, ensure transparency, and protect workers from exploitative practices. These centers also provide pre-departure orientation and contract attestation services (GCO. 2025, Saraswathi. 2023).



- **New visa types for entrepreneurs, freelancers, and students:** Qatar has introduced specialized visa categories to attract skilled professionals and diversify its labor market. These include visas for entrepreneurs, freelancers, and students, supporting Qatar's transition to a knowledge-based economy (Fahad. 2023, GCO. 2025).

These reforms reflect Qatar's commitment to creating a more inclusive and dynamic labor market, aligning with its National Vision 2030 and international labor standards (MADLSA. 2020, GCO. 2025).

**Table 3. Key Labor Reforms In Qatar (2020-2024)**

Year	Reform	Impact
2020	Abolishment of No-Objection Certificate (NOC)	Increased worker mobility and autonomy
2021	Introduction of Universal Minimum Wage	Improved financial stability for all workers
2023	Specialized Visa Categories for Entrepreneurs, Freelancers, Students	Support for knowledge economy and attracting global talent
2024	Expansion of Qatar Visa Centers	Streamlined recruitment and enhanced worker protection

### 3.3 Alignment with Qatar National Vision 2030

Qatar's National Vision 2030 (QNV 2030) emphasizes economic diversification and the development of a knowledge-based economy, with a focus on attracting skilled expatriate labor to drive innovation and growth. The National Strategy for an Effective and Highly Productive Workforce 2024-2030 aligns with this vision by prioritizing the recruitment of high-skilled expatriates in sectors like technology, renewable energy, and healthcare. Key initiatives include safeguarding labor rights, streamlining visa processes, and fostering innovation to create a dynamic labor market (GCO. 2008, GCO. 2024).

Recent reforms, such as specialized visa categories for entrepreneurs, freelancers, and students, further enhance Qatar's appeal to global talent. These measures support Qatar's transition to a knowledge-based economy and ensure a steady inflow of skilled expatriates to meet the demands of its growing industries (Qatar Tribune. 2024).

By aligning labor policies with QNV 2030, Qatar has strengthened its position as a stable and attractive destination for expatriate labor, ensuring sustained economic growth and resilience (The Peninsula Qatar. 2024, SHRM. 2024).

## 4. Future Outlook

### 4.1 Intra-GCC Reconciliation and Regional Integration

The Al-Ula Agreement, signed in January 2021, continues to strengthen diplomatic and economic ties between Qatar and its GCC neighbors, including Saudi Arabia, the UAE, Bahrain, and Egypt. Recent developments, such as the Qatari-UAE official delegations meeting in Abu Dhabi in September 2024, highlight ongoing efforts to implement the Al-Ula Declaration and enhance

regional cooperation. These discussions focus on mechanisms to restore traditional labor corridors and facilitate the movement of workers, reducing disruptions caused by the 2017 blockade (General Secretariat of the Gulf Cooperation Council. 2024, MOFA. 2024).

Qatar's role as a mediator in regional conflicts, combined with its commitment to GCC integration, enhances its credibility and stability in the region. This positions Qatar as an attractive destination for skilled labor, particularly as traditional labor corridors re-open and regional collaboration deepens (MOFA. 2024).

## 4.2 Global Talent Competition

As neighboring GCC nations enhance labor reforms to attract global talent, Qatar continues to offer competitive incentives to maintain its position as a progressive labor hub. Recent initiatives, such as capital funds and growth opportunities in sectors like healthcare, technology, and renewable energy, have attracted foreign professionals seeking stable and lucrative employment (The Peninsula Qatar. 2025c).

Qatar's strategic investments in healthcare and life sciences, supported by initiatives like the Qatar National Vision 2030, further enhance its appeal to skilled expatriates. These efforts align with Qatar's goal of becoming a regional leader in innovation and economic diversification, ensuring a steady inflow of global talent (Invest Qatar. n.d., GCO. 2008).

## 4.3 Sustainability and Worker Welfare

Ongoing reforms in housing, wages, and legal protections remain critical to sustaining Qatar's labor market attractiveness. The introduction of a non-discriminatory minimum wage, the abolition of the No-Objection Certificate (NOC) requirement, and the establishment of the Workers' Support and Insurance Fund are notable steps toward improving worker welfare (FIFA, n.d., Amnesty International. n.d.). However, organizations like Amnesty International have highlighted the need for sustained improvements, particularly in addressing wage theft, ensuring fair working conditions, and maintaining the positive legacy of the 2022 FIFA World Cup. Continued collaboration with international bodies like the ILO will be essential to achieving these goals (Amnesty International. 2022, ILO. 2024).

# 5. Insights from the Ministry of Labor's Internal Data

Building on the preceding analysis, this section draws on internal Ministry of Labor data to provide deeper, evidence-based insights into Qatar's expatriate labor dynamics. Two proprietary analytical reports – a comparative study of labor market shocks during major crises and an assessment of labor mobility shifts following recent visa reforms – inform the discussion. These internal datasets allow a granular economist-style interpretation of trends, aligning empirical findings with Qatar's strategic objectives under the National Development Strategy 2024–2030 (NDS3) and ongoing labor reforms. The analysis is structured into sub-sections covering the data framework, crisis-period impacts, post-reform mobility patterns, structural labor market asymmetries, and resulting policy implications.

## 5.1 Overview of the Dataset and Classification Framework

The Ministry's Labor Market Information System (LMIS) has been leveraged to generate two key internal reports: (1) the Qatar Crisis Impact Comparative Analysis (2025) examining labor market

outcomes during the 2017–2019 GCC diplomatic blockade versus the 2020–2022 COVID-19 pandemic, and (2) the Reform Impact Analysis (2025) evaluating changes in expatriate job mobility before and after Qatar’s landmark 2020 labor reforms (notably the Kafala system overhaul). Both datasets are comprehensive, covering millions of employment records, and are systematically classified to isolate the effects of specific time periods and demographic segments.

### 5.1.1 Reform Phase Classification

Each dataset is classified based on key time periods or reform phases to enable targeted comparisons:

- **Crisis Comparison:** The GCC Blockade (2017–2019) and the COVID-19 Crisis (2020 - 2022) represent two distinct periods that enable a side-by-side evaluation of labor market responses to different types of shocks: the former being geopolitical, and the latter health-related.
- **Reform Analysis:** Pre-Reform refers to the period before the year 2020, during which Qatar operated under the Kafala system. Post-Reform denotes the period beginning in 2020, when major labor policy changes were introduced, including the abolition of exit permits and the No-Objection Certificate (NOC) requirement for job changes.

This phased classification isolates the effects of key policy changes and controls for unrelated external variables, allowing for a clearer attribution of observed outcomes.

### 5.1.2 Regional Classification

To analyze patterns by expatriate origin, all nationalities were grouped into the following broad regions. These align with prior demographic segments used throughout the report.

- **Asia:** Includes South, Southeast, and East Asian countries.
- **Africa:** Includes Sub-Saharan and North African countries, excluding Egypt where specified.
- **Middle East:** Non-GCC Arab and nearby states such as Lebanon, Syria, Iran, and Jordan.
- **GCC:** Qatar, Kuwait, and Oman. Saudi Arabia, UAE, and Bahrain are treated separately as part of the Blockading group.
- **Blockading Countries:** Includes only Egypt for the purposes of blockade-related analysis, as it is the only country from this group that appears in the relevant dataset.
- **Europe, North America, South America, Oceania:** Grouped according to standard continental definitions.
- **Other:** Countries not easily assigned to the above categories.

This classification framework ensures consistency across datasets and enables regional analysis that aligns with the Ministry’s labor monitoring strategy. A separate category for "Blockading Countries" is retained to reflect their geopolitical relevance during the 2017 crisis; however, only Egypt is included in the analysis due to data availability. The data is also disaggregated by economic sector and occupation, enabling multi-dimensional insights into sector-specific

shocks and labor mobility. This structure allows policymakers to draw nuanced conclusions grounded in both demographic and occupational realities.

## 5.2 Labor Market Shocks and Resilience During Crisis Periods

Qatar's expatriate labor market has undergone multiple external shocks in recent years, most notably the 2017–2019 GCC blockade and the 2020–2022 COVID-19 pandemic. This section analyzes workforce responses to these disruptions using LMIS data, with a focus on job loss volumes, sectoral and regional vulnerabilities, and differential impacts by nationality. Each subsection integrates visual evidence to highlight patterns of resilience and structural exposure.

### 5.2.1 Scale and Composition of Workforce Exits

The COVID-19 pandemic resulted in more than three times the job losses observed during the blockade period, with total workforce exits rising from approximately 225,000 to over 700,000. The job loss rate increased from 15.3 percent to 28.4 percent, while total turnover climbed from 21.8 percent to 40.4 percent. These shifts reflect the unprecedented disruption to global mobility and domestic operations caused by the pandemic compared to the more regionally contained nature of the blockade.

A striking observation across both crisis periods is the stability in the ratio of job losses to overall turnover, which remained close to 70 percent. This consistency points to entrenched employer behaviors during economic contractions: a preference for large-scale layoffs as the primary means of workforce adjustment. Rather than adopting more adaptive responses - such as internal redeployment, flexible work arrangements, or short-term contracts - many employers relied on direct terminations, facilitated by low separation costs and a labor framework centered on employer control.

This dynamic illustrates a core limitation in labor market flexibility. While the scale of disruption differed between the two crises, the mechanism of response remained largely unchanged. The structure of employment contracts, limited redundancy protections, and rigid sectoral labor channels leave little room for countercyclical labor policy or negotiated adjustment strategies. For mid- and lower-wage expatriates in particular, this translates into repeated vulnerability and limited resilience against future shocks (Table 4).

**Table 4. Comparative Job Loss and Turnover (2017–2019 vs. 2020–2022)**

Indicator	GCC Blockade (2017-2019)	COVID-19 (2020-2022)	Difference
Total Job Losses	225,056 people	702,479 people	+477,423 people (212.1%)
Average Expatriate Workers	1,468,570 people	2,477,674 people	+1,009,104 people (68.7%)
Job Loss Rate	15.32%	28.35%	+13.03 percentage points

Indicator	GCC Blockade (2017-2019)	COVID-19 (2020-2022)	Difference
Turnover Rate	21.83%	40.39%	+18.56 percentage points
Job Loss to Turnover Ratio	0.70	0.70	0

**Note:** This table presents aggregate job losses, average workforce size, turnover rates, and loss-to-turnover ratios during the blockade and pandemic periods.

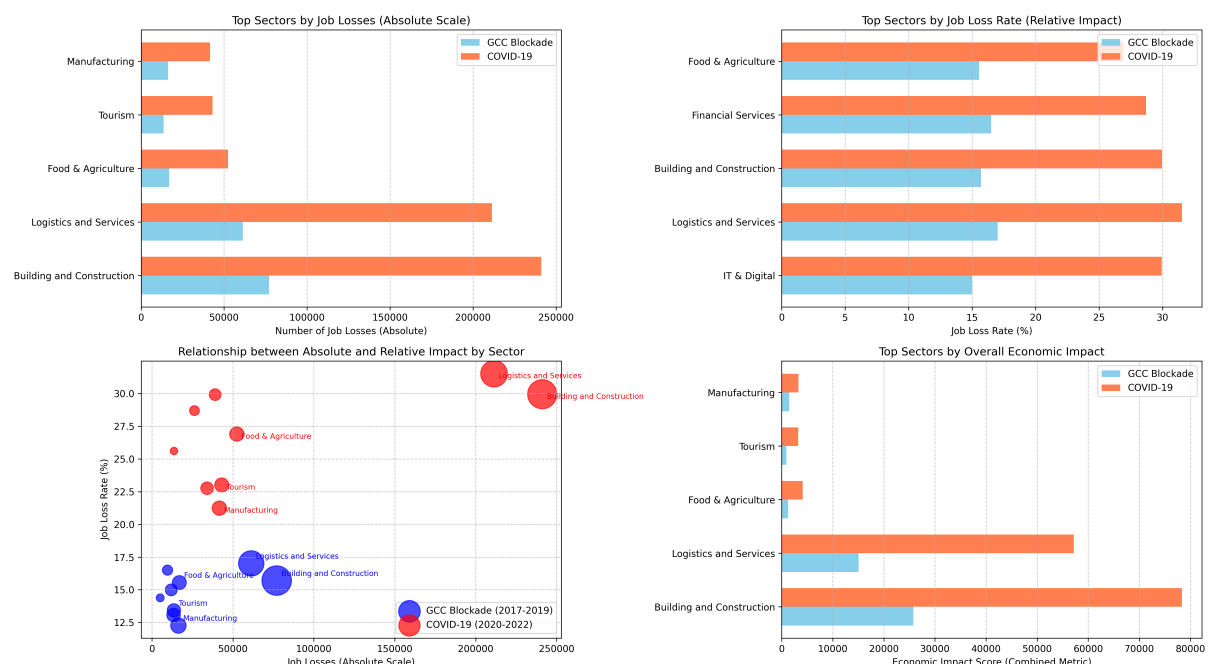
**Reference Source:** Ministry of Labour (LMIS)

## 5.2.2 Sectoral Fragility and Exposure to External Shocks

Construction and logistics consistently ranked as the most affected sectors during both crises. However, the pandemic extended labor market disruption far beyond these core areas. The IT & Digital sector, for example, recorded a job loss rate of 291 per 1,000 workers during COVID-19, despite being nearly unaffected during the blockade. Similarly, healthcare, food services, and agriculture emerged among the top five impacted sectors during both crises.

These trends illustrate how different types of crises interact with sector-specific vulnerabilities. While the blockade mainly disrupted externally dependent sectors linked to regional trade, the pandemic undermined internal service delivery, physical operations, and consumer-facing roles. This broader exposure profile indicates that Qatar's labor market is highly sensitive not only to geopolitical events but also to global disruptions that interrupt project flows, worker mobility, and local demand.

**Figure 1. Sectoral Job Loss Patterns Across Crisis Periods**



**Note:** This figure presents the five sectors with the highest job loss rates in each crisis period.

**Reference Source:** Ministry of Labour (LMIS)

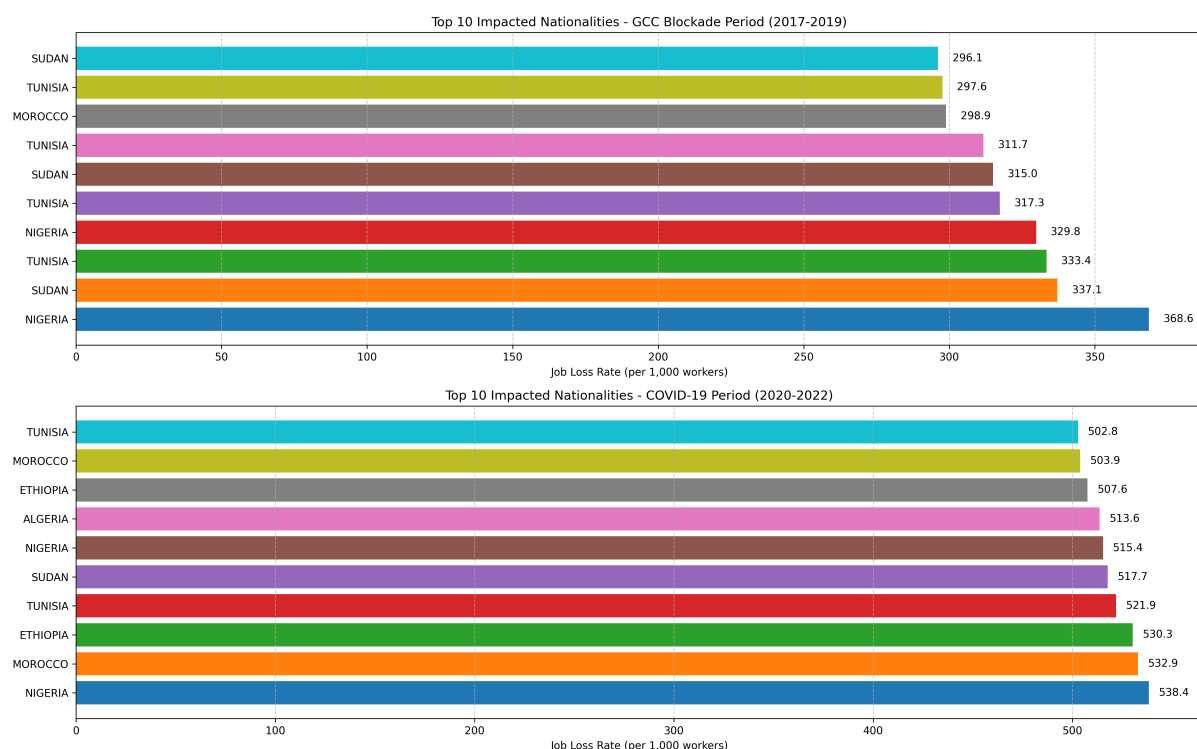
### 5.2.3 Nationality-Based Disparities and Structural Risk Profiles

LMIS data reveal stark disparities in how different nationalities experienced job loss during the two crises. Nigerians consistently appeared among the most affected, with loss rates of 369 per 1,000 workers during the blockade and 530 per 1,000 during the pandemic. For Moroccans, the pandemic represented a first major shock, placing them among the top three most affected groups despite their limited exposure during the blockade.

These patterns reflect more than random variation. They indicate structural risk profiles shaped by nationality, with distinct clustering in occupations, employment arrangements, and industry assignments. For example, Egyptians, who are employed across construction, transport, and logistics, saw job loss rates increase from 147 to 321 per 1,000 workers between the two crises. The data suggest that while Egyptian workers were not entirely marginalized by the blockading countries, they faced increased exposure to risk under unstable diplomatic conditions.

In broader terms, nationality has become a proxy for employment risk in Qatar's segmented labor market. During crises, these differences are amplified, creating persistent inequalities in job security, recovery timelines, and re-entry prospects. Policymakers must therefore consider not only sectoral and contractual reforms, but also nationality-based inclusion mechanisms to build true labor market resilience.

**Figure 2. Job Loss Rate by Nationality Group**



**Note:** This chart shows the ten most affected nationalities by job loss rate in each crisis period.

**Reference Source:** Ministry of Labour (LMIS)



## 5.3 Mobility Shifts Under the Visa Reform Era

Drawing on internal data from the Ministry of Labor’s LMIS-based reform impact analysis, the following section examines shifts in expatriate labor mobility following Qatar’s 2020 labor market reform. The section is organized into four thematic subsections, each highlighting key findings supported by visual evidence.

### 5.3.1 Transfer Volume vs. Mobility Rate: Interpreting the Divergence

While the total number of job transfers surged after the 2020 labor reform, increasing from approximately 51,000 to nearly 480,000, the mobility rate - defined as job transfers relative to the total expatriate labor force - declined from 0.0034% to 0.0021%. This apparent contradiction is primarily due to the substantial growth in the overall labor force during the same period, as Qatar’s economy recovered and hiring resumed across sectors. As a result, although job changes rose in absolute terms, they accounted for a smaller share of a larger workforce.

This divergence also reflects transitional implementation dynamics. Initial administrative hurdles, gaps in awareness, and uneven employer readiness may have tempered early uptake despite the policy change. In parallel, statistical volatility during the pandemic complicates direct comparisons with earlier baselines. The post-reform surge in job transfers also coincided with a broader recovery in expatriate labor inflows, as hiring resumed across sectors following both the COVID-19 downturn and easing of regional tensions. This expansion in the labor pool underscores how mobility reforms not only influenced internal job switching but also reshaped the volume and composition of new foreign worker entries.

Crucially, a lower mobility rate should not be interpreted as reform failure. Rather, it may represent a phase of stabilization in which job switching becomes more intentional and aligned with sector-specific dynamics. The broader picture - rising transfer volumes coupled with a declining mobility rate - suggests that reforms have successfully unlocked worker mobility, but institutional and behavioral shifts are progressing more gradually.

Together, these metrics illustrate the complexity of labor market transformation. Ongoing monitoring will be necessary to assess how freedom of movement translates into sustained labor flexibility and long-term workforce optimization.

**Table 5. Relationship Between Transfer Volume and Mobility Rate (Pre- and Post-Reform Period)**

Metric	Before Reform	After Reform	Absolute Change	Relative Change (%)
Calculated Mobility Rate	0.00%	0.00%	0.00%	-36.98%
Mean Reported Rate	0.06%	0.02%	-0.04%	-63.75%
Median Reported Rate	0.00%	0.00%	0.00%	nan%

Metric	Before Reform	After Reform	Absolute Change	Relative Change (%)
Total Transfers	53,337	486,136	432,799	811.44%
Total Expats	1,571,003,180	22,720,193,182	21,149,190,002	1346.22%

**Note:** This figure presents annual trends in both the total number of job transfers and the mobility rate (defined as job transfers per expatriate worker) before and after the 2020 reform.

**Reference Source:** Ministry of Labour (LMIS)

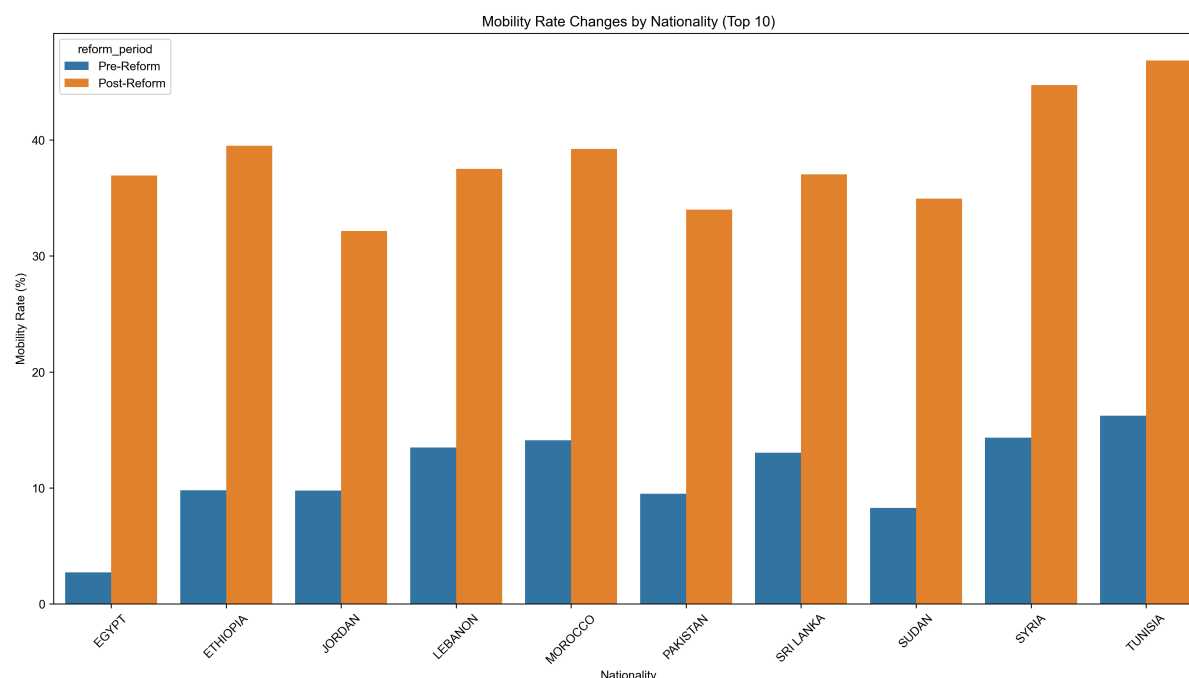
### 5.3.2 Mobility Disparities by Nationality

The reform's impact on job mobility was not uniform across expatriate groups. Internal LMIS data show that the most significant increases in job transfers were concentrated among workers from Asia and the Middle East. In particular, expatriates from former blockading countries such as Egypt and Jordan registered sharp rises in job change activity. For example, transfer volumes for several Asian nationalities more than doubled in the post-reform period.

In contrast, Western expatriates demonstrated far more stable patterns of job movement. Although this group is generally concentrated in higher-skilled and higher-paid roles, the data show little to no growth in transfer activity after the reform. This divergence likely reflects structural differences in labor market dynamics. Workers from Asia and the Middle East may have previously faced more rigid constraints under the former NOC system, whereas Western professionals may have already enjoyed more mobility or occupied longer-term, contract-based roles with greater employment stability.

These trends point to a segmented labor market response. The most substantial improvements in labor flexibility were concentrated among mid- and lower-skilled expatriates who historically faced barriers to mobility. The data suggest that the reform was particularly effective in enabling job transitions among groups that had previously lacked such options.

#### Figure 3. Change in Job Transfers by Nationality (Top 10)



**Note:** This figure presents the ten nationalities with the largest absolute increase in job transfers following the 2020 reform.

**Reference Source:** Ministry of Labour (LMIS)

### 5.3.3 Within-Sector vs. Cross-Sector Mobility

The reform influenced not only whether expatriates could change jobs, but also how they moved between sectors. LMIS data indicate a modest increase in the share of job transfers that occurred within the same sector, rising from 36.6 percent before the reform to 37.0 percent afterward. Although the shift is small, it is noteworthy in the context of broader labor mobility patterns.

This rise in same-sector transfers suggests that many expatriates sought improved conditions or opportunities within familiar occupational domains. Rather than seeking entirely new roles, these workers likely aimed to leverage their existing skills and sectoral experience. For employers, this behavior signals greater intra-sector competition for talent, particularly in fields such as construction, hospitality, and healthcare where job roles are often standardized and skills are readily transferrable.

At the same time, cross-sector mobility continues to dominate. This indicates that although restrictions on employer change have eased, deeper structural frictions - such as gaps in certification, industry-specific experience, or differences in sectoral demand - still shape the patterns of job transitions. These factors may also explain why the share of cross-sector moves remains high even after reform.

From a policy standpoint, the increase in same-sector transitions reflects an expansion of worker agency without destabilizing existing sectoral employment structures. This provides a foundation for targeted upskilling and career advancement pathways within specific industries.

**Table 6. Sector Mobility Summary Table**

Metric	Before Reform	After Reform	Change
Same-Sector Transitions (%)	36.63%	36.96%	0.33pp
Total Transitions	53,337	486,136	432,799

**Note:** This table presents the share of job transitions occurring within and across sectors based on LMIS data.

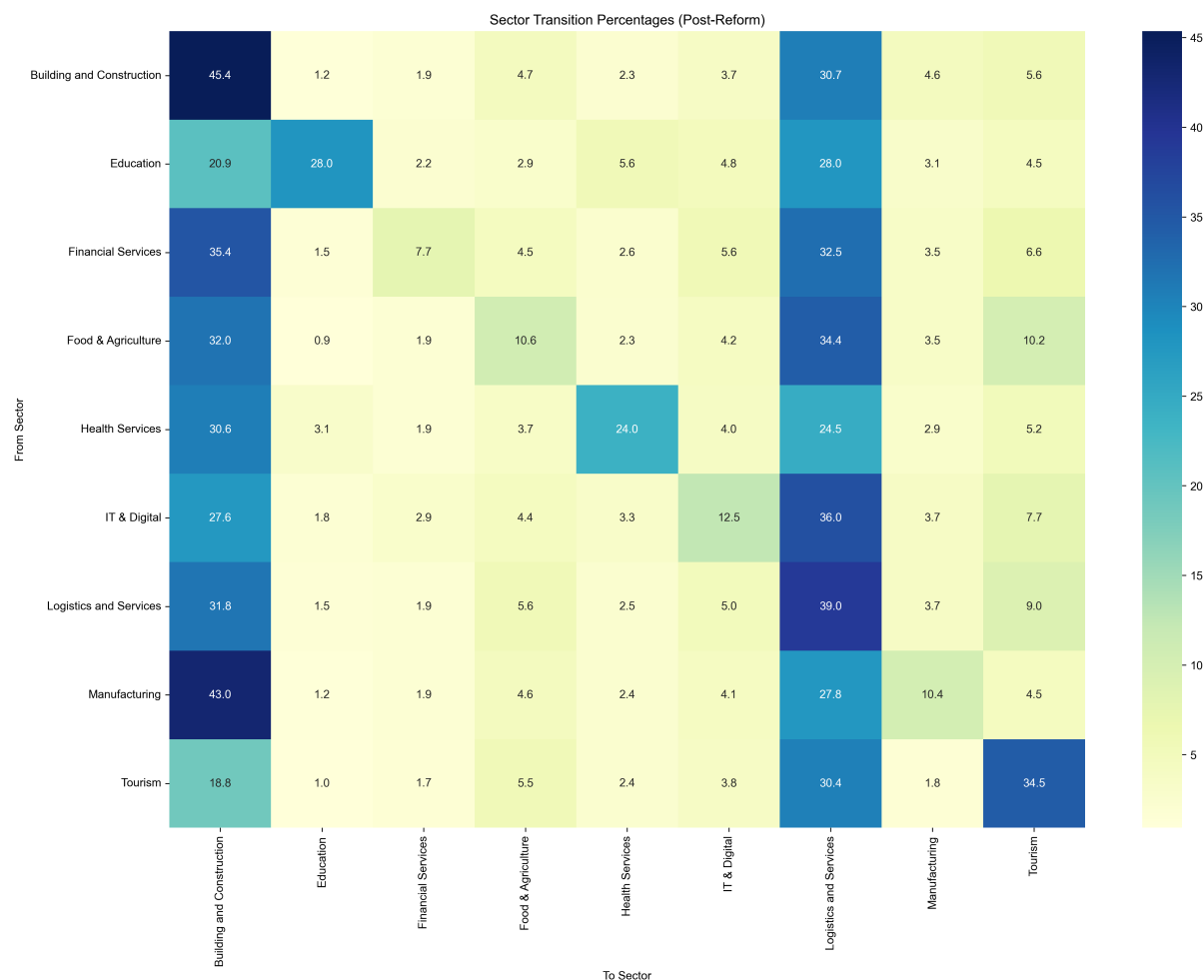
**Reference Source:** Ministry of Labour (LMIS)

**Figure 4. Sector Transition Patterns Before and After Reform**

(a)



(b)



**Note:** These heatmaps compare sector-to-sector job transitions before and after the 2020 labor market reform. The upper panel (a) illustrates pre-reform pathways, while the lower panel (b) highlights post-reform changes, including emerging transition flows and increased fluidity.

**Reference Source:** Ministry of Labour (LMIS)

## 5.4 LMIS Data in Context: Comparative and Strategic Insights

This section presents a consolidated discussion of how LMIS data compares with the public datasets used earlier in the report and outlines its practical value for policy and institutional strategy.

### 5.4.1 Added Value Over Public Datasets

Public sources, such as national surveys and mobility reports, provide essential context but often lack the granularity needed for reform evaluation. LMIS offers disaggregation by sector, region, salary band, and nationality - enabling more refined analysis. For example, LMIS clarifies the seemingly contradictory pattern of increased job transfers alongside declining per capita mobility, an insight only visible through administrative microdata.

### 5.4.2 Structural Differentiation and Risk Profiling

LMIS makes visible the structural segmentation of Qatar's labor market. It highlights differences in job loss patterns during crisis periods, salary distribution by region, and retention disparities across nationalities - offering a more detailed risk profile than public datasets. These structural indicators are critical for targeting reform outcomes more effectively.

### 5.4.3 Strategic Planning and Reform Monitoring

LMIS serves as a core resource for evaluating policy outcomes and supporting institutional coordination. Its application in tracking changes related to the No-Objection Certificate, visa reform, and sectoral shifts allows ministries to make timely and targeted decisions. These capabilities are central to realizing the human capital priorities of NDS3.

In short, while public data enables broad trend analysis, LMIS provides the operational detail necessary to inform adaptive, evidence-based governance.

## 5.5 Strategic Relevance of LMIS Data for Policy and Governance

The insights drawn from the Ministry of Labour's LMIS datasets highlight the critical value of internal administrative data in advancing evidence-based workforce governance. While publicly available statistics offer high-level snapshots of labor trends, LMIS enables analysis that is both timelier and more responsive to policy needs. This section summarizes how LMIS insights can support Qatar's labor market strategy under the Third National Development Strategy (NDS3). This is particularly relevant in a post-crisis context, where geopolitical shocks and recovery periods have led to fluctuating inflows of expatriate workers, requiring responsive tools for monitoring entry volumes, transition patterns, and risk exposure.

The strategic relevance of LMIS data can be summarized across four key areas:

- **Reform Monitoring and Evaluation:** LMIS allows for more precise tracking of reform outcomes, including job transfers, turnover, and continuity across regions and nationalities. It explains trends not captured in aggregate public data - such as rising transfer volumes alongside declining per capita mobility.
- **Sectoral Forecasting and Workforce Planning:** Sectoral data from LMIS enables ministries to anticipate labor gaps and retention risks, particularly in healthcare, IT, and logistics. It supports proactive alignment of training programs with emerging workforce demands.
- **Targeted and Inclusive Policy Design:** LMIS reveals structural disparities in labor market outcomes by nationality and region, informing differentiated approaches to upskilling, contract design, and onboarding procedures for vulnerable groups.
- **Institutional Coordination and Real-Time Monitoring:** LMIS supports cross-agency policy alignment by providing real-time data on workforce transitions and employer behavior. It strengthens oversight and supports adaptive implementation of labor reforms under NDS3.



## 6. Conclusion

This report has examined how Qatar's expatriate labor market has responded to major disruptions and structural reforms, integrating new insights drawn from the Ministry of Labour's LMIS datasets. The updated findings reveal deeper patterns of mobility, sectoral resilience, and demographic disparities that were not visible in public data sources alone. LMIS has enabled a more detailed analysis of job loss dynamics during the blockade and COVID-19 pandemic, sectoral mobility trends, and the uneven impact of reforms across nationalities and regions.

Where previous conclusions pointed to Qatar's macro-level adaptability and strategic positioning, this expanded analysis underscores the importance of workforce-level granularity in informing future policies. The use of LMIS data has revealed that:

### Key Takeaways:

- 1. Crisis Impact Varied Widely Across Groups:** While both the blockade and the pandemic triggered large-scale job losses, the effects were highly uneven across sectors and nationalities. Certain groups faced compounding risks over both periods, highlighting the need for nationality-aware risk mitigation.
- 2. Labor Market Behavior Has Become More Dynamic:** The shift in mobility patterns-such as increased transfer volume but lower transfer rates per capita-suggests that Qatar's labor market is no longer shaped solely by legal constraints, but also by changing employer strategies and workforce expectations.
- 3. Sectoral Transitions Are Not Uniform:** LMIS-based tracking of sector-to-sector transitions before and after reform shows that some sectors have emerged as net talent gainers while others experience persistent outflows. This calls for sector-specific retention strategies and upskilling pipelines.
- 4. Institutional Capacity Is Enhanced by Real-Time Data:** The integration of LMIS into policy monitoring allows for faster, more precise responses to emerging challenges. It strengthens accountability and helps align implementation with Qatar's NDS3 objectives.

Going forward, the strategic use of internal administrative data must remain central to Qatar's labor market governance. By linking real-time workforce behavior to national planning, LMIS provides the evidence base needed to strengthen reform outcomes, anticipate shocks, and deliver inclusive growth. The insights presented here reinforce the value of Qatar's continued investment in data-driven policy, not only to manage labor market transitions, but to shape them proactively.

### Acknowledgement:

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## 7. Appendix

**Table A. Regional Classification Used in Analysis**

*This table outlines the classification scheme applied to expatriate nationalities in the analysis, grouping countries into broader regions based on geographic and political considerations relevant to Qatar's labor market structure. The mapping ensures consistency across datasets and facilitates disaggregated analysis by region.*

Region	Example Countries	Classification Notes
<b>Africa</b>	ALGERIA, ANGOLA, BENIN, BOTSWANA, BURUNDI, CAMEROON, CAPE VERDE, CENTRAL AFRICAN REPUBLIC, CHAD, COMOROS, CONGO, COTE D'IVOIRE, CÔTE D'IVOIRE, DEMOCRATIC CONGO, DJIBOUTI, EQUATORIAL GUINEA, ERITREA, ETHIOPIA, GABON, GAMBIA GAMBIA, GHANA, GUINEA, GUINEA-BISSAU, IVORY COAST, KENYA, LESOTHO, LIBERIA, LIBYA, MADAGASCAR, MALAWI, MAURITANIA, MAURITIUS, MOROCCO, MOZAMBIQUE, NAMIBIA, NIGER, NIGERIA, RWANDA, SENEGAL, SEYCHELLES, SIERRA LEONE, SOMALIA, SOUTH AFRICA, SOUTH SUDAN, SUDAN, SWAZILAND, TANZANIA, TOGO, TUNISIA, UGANDA, UPPER VOLTA, ZIMBABWE	Includes Sub-Saharan and North African nations not in GCC or blockading countries
<b>Asia</b>	AFGHANISTAN, ARMENIA, AZERBAIJAN, BANGLADESH, BHUTAN, BRUNEI, BURMA, CAMBODIA, CHINA, CHINESE TAIPEI, DEM PEOPLES REP KOREA, DEMOCRATIC PEOPLES REPUBLIC OF KOREA, EAST TIMOR, GEORGIA, HONG KONG, HONG KONG SAR, INDIA, INDONESIA, JAPAN, KOREA, KYRGYZ STAN, LAOS, MACAO, MACAU, MALAYSIA, MALDIVES, MONGOLIA, MYANMAR, NEPAL, PAKISTAN, PALESTINE, PEOPLES REPUBLIC OF CHINA, PHILIPPINES, REPUBLIC OF CHINA, REPUBLIC OF KOREA, SINGAPORE, SOUTH KOREA, SRI LANKA, SRILANKA, TAIWAN, TAJIKISTAN, THAILAND, TIMOR EAST, TURKMENISTAN, UZBEKISTAN, VIETNAM	Includes South, Southeast, and East Asia; excludes Middle East
<b>Blockading Countries</b>	BAHRAIN, EGYPT, KINGDOM OF SAUDI ARABIA, SAUDI ARABIA, STATE OF BAHRAIN, UAE, UNITED ARAB EMIRATES	Includes countries involved in the 2017 blockade (Saudi Arabia, UAE, Bahrain, Egypt)
<b>Europe</b>	ALBANIA, AUSTRIA, BELARUS, BELGIUM, BOSNIA AND HERZEGOVINA, BULGARIA, CROATIA, CYPRUS, CZECH, CZECH REPUBLIC, CZECHO, DENMARK, ESTONIA, FINLAND, FRANCE, GERMANY, GREAT BRITAIN, GREECE, HUNGARY, ICELAND, IRELAND, ITALY, KOSOVO, LATVIA, LITHUANIA, LUXEMBOURG, MACEDONIA, MALTA, MOLDOVA, MONTENEGRO, NETHERLANDS, NORTHERN IRELAND, NORWAY, POLAND, PORTUGAL, REP. OF ESTONIA, REPUBLIC OF IRELAND, ROMANIA, RUSSIA, RUSSIAN	Includes EU and non-EU countries in continental Europe

	FEDERATION, SAN MARINO, SERBIA, SLOVAKIA, SLOVENIA, SPAIN, SWEDEN, SWITZERLAND, UK, UKRAINE, UNITED GERMANY, UNITED KINGDOM	
<b>GCC</b>	KUWAIT, OMAN, QATAR, STATE OF KUWAIT, STATE OF QATAR, SULTANATE OF OMAN	Includes only GCC countries not involved in the 2017 blockade
<b>Middle East</b>	HASHEMITE KINGDOM OF JORDAN, IRAN, IRAQ, ISLAMIC REPUBLIC OF IRAN, ISRAEL, JORDAN, LEBANON, REPUBLIC OF IRAQ, REPUBLIC OF LEBANON, REPUBLIC OF TURKEY, REPUBLIC OF YEMEN, STATE OF ISRAEL, SYRIA, SYRIAN ARAB REPUBLIC, TURKEY, YEMEN	Includes non-GCC Arab countries in West Asia
<b>North America</b>	BAHAMAS, BARBADOS, BELIZE, CANADA, COSTA RICA, CUBA, DOMINICAN REPUBLIC, GUATEMALA, HAITI, HONDURAS, JAMAICA, MEXICO, NICARAGUA, PANAMA, REP. OF CUBA, TRINIDAD AND TOBAGO, U.S.A, UNITED STATES, UNITED STATES OF AMERICA, USA	Includes the U.S., Canada, Mexico, and Caribbean states
<b>Oceania</b>	AUSTRALIA, COMMONWEALTH OF AUSTRALIA, FIJI, INDEPENDENT STATE OF PAPUA NEW GUINEA, KIRIBATI, NAURU, NEW ZEALAND, PAPUA NEW GUINEA, SAMOA WESTERN, SOLOMON ISLANDS, TONGA, VANUATU, WESTERN SAMOA	Includes Australia, New Zealand, and Pacific island nations
<b>South America</b>	ARGENTINA, BOLIVIA, BRAZIL, CHILE, COLOMBIA, ECUADOR, FEDERATIVE REPUBLIC OF BRAZIL, GUYANA, PARAGUAY, PERU, REPUBLIC OF CHILE, REPUBLIC OF COLOMBIA, REPUBLIC OF PERU, SURINAM, URUGUAY, VENEZUELA	Includes all South American countries

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