



Exporting to **THE GULF STATES**

A guide for clients



#GlobalAmbition

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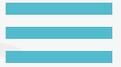
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Gulf States

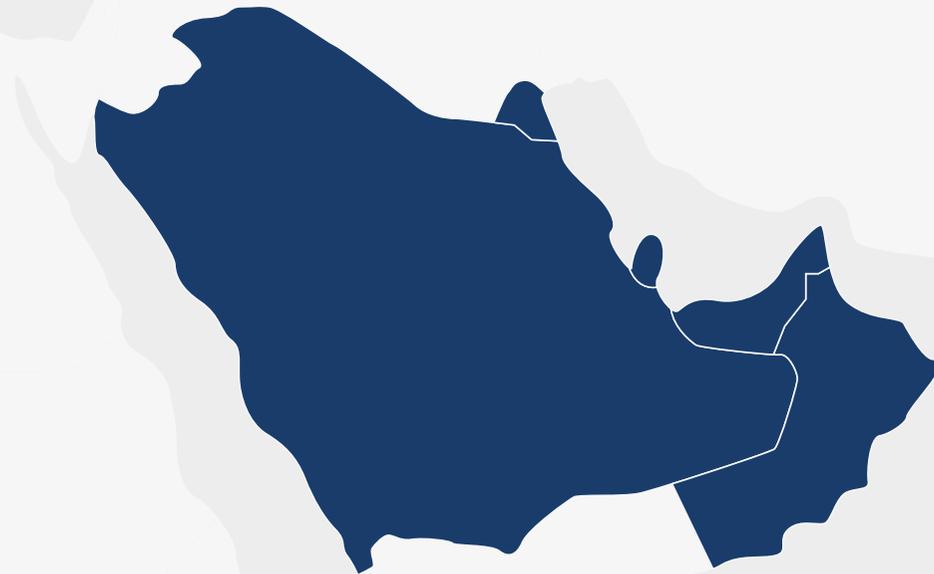
Population	58,801,848
Annual GDP Growth (2019)	0.8%
Unemployment (2019)	4.5%
GDP per capita average in USD (2019)	\$29,700
Total Global Exports (2019)	\$742.22bn
Predicted economic growth by 2021	2.5%
Enterprise Ireland Client Exports (2020)	€461.3m ¹

Bahrain

Population	1,708,775 ²
Annual GDP Growth (2019)	1.58% ³
Unemployment (2019)	3.9% ⁴
GDP per capita average in USD (2019)	\$20,913 ⁵
Global Exports (2019)	\$13.22bn ⁶
Predicted economic growth by 2021	1.5% ⁷
Enterprise Ireland Client Exports (2020)	€54m ⁸

Kuwait

Population	4,280,371 ⁹
Annual GDP Growth (2019)	0.7% ¹⁰
Unemployment (2019)	2.17% ¹¹
GDP per capita average in USD (2019)	\$32,697 ¹²
Global Exports (2019)	\$54.6bn ¹³
Predicted economic growth by 2021	2.6% ¹⁴
Enterprise Ireland Client Exports (2020)	€39.8m ¹⁵





Oman

Population	5,125,904 ¹⁶
Annual GDP Growth (2019)	0.5% ¹⁷
Unemployment (2019)	3.1% ¹⁸
GDP per capita average in USD (2019)	\$14,992 ¹⁹
Global Exports (2019)	\$35.9bn ²⁰
Predicted economic growth by 2021	3% ²¹
Enterprise Ireland Client Exports (2020)	€19m ²²

Qatar

Population	2,888,073 ²³
Annual GDP Growth (2019)	0.1% ²⁴
Unemployment (2019)	0.1% ²⁵
GDP per capita average in USD (2019)	\$62,021 ²⁶
Global Exports (2019)	\$69.8bn ²⁷
Predicted economic growth by 2021	2.2% ²⁸
Enterprise Ireland Client Exports (2020)	€29.9m ²⁹

Saudi Arabia

Population	34,892,972 ³⁰
Annual GDP Growth (2019)	0.3% ³¹
Unemployment (2019)	12.7% ³²
GDP per capita average in USD (2019)	\$20,542 ³³
Global Exports (2019)	\$251.8bn ³⁴
Predicted economic growth by 2021	2.9% ³⁵
Enterprise Ireland Client Exports (2020)	€166.3m ³⁶

United Arab Emirates

Population	9,905,753 ³⁷
Annual GDP Growth (2019)	1.3% ³⁸
Unemployment (2019)	2.6% ³⁹
GDP per capita average in USD (2019)	\$41,420 ⁴⁰
Global Exports (2019)	\$316.9bn ⁴¹
Predicted economic growth by 2021	3.3% ⁴²
Enterprise Ireland Client Exports (2020)	€152.3m ⁴³



Why Export to The Gulf States

The Gulf States represent a significant market opportunity for export-focused Irish companies. They are rich in natural resources but heavily reliant on imports and with growing populations allied to plans for significant infrastructural development. More commonly recognised as the Gulf Cooperation Council (GCC), the Gulf States are united through an intergovernmental, political, and economic union consisting of all Arab states on the Arabian peninsula (except Iraq). The member states are Bahrain, Kuwait, Oman, Qatar, the Kingdom of Saudi Arabia, and the United Arab Emirates. While this union has standardised some aspects of doing business across its member states, there are also important differences which Irish companies should consider carefully.

The United Arab Emirates

In just a few decades, the United Arab Emirates (UAE) has established itself as the financial heart of the Middle East and is regarded as a prime business and tourism hub in the region – principally the emirates of Dubai and Abu Dhabi⁴⁴. Having built an open economy which is known for its ease of doing business, the UAE is a magnet for expatriates: of the 9.9 million people living in the seven emirates, more than 80% hail from outside the country⁴⁵. The UAE is a significant consumer of Irish goods and services. While still a strong exporter of oil, the UAE has successfully managed to diversify from relying solely on hydrocarbons, resulting in more than 80% of its GDP now coming from non-oil activity⁴⁶.

Qatar

Qatar's miniscule size and its population of just 2.8 million belies its considerable financial might⁴⁷. It is the region's fastest growing economy with a place in the world's top 10 highest GDP per-capita countries (more than \$60,000)⁴⁸. Irish firms have built a presence in the construction, oil & gas, and aviation sectors in Qatar, yet new sectoral opportunities are unveiling themselves as low oil prices call for economic diversification. Qatar's ambitious development plans for its non-energy sector is creating a broad range of opportunities in infrastructure, education and health⁴⁹. Considered to be one of the more progressive states in the region, Qatar's profile has been boosted significantly by winning the rights to host the 2022 FIFA World Cup which alone will cost an estimated \$200 billion-plus to stage⁵⁰.

Kuwait

Like Qatar, Kuwait is also small geographically but with a population of just over 4 million⁵¹, and a GDP of \$120 billion, it is an important market and a significant consumer of Irish exports in the region⁵². Kuwait is undergoing significant expansion in the infrastructure and construction industries. The government has approved a National Development Plan that includes construction of major roadways, a new airport, new hospitals, new residential developments, a new Kuwait University campus, a new oil refinery, oil exploration, new power projects, and a new railway and metro⁵³. The traditional import sectors of automotive, oil and gas, computers/ICT, telecommunications equipment, and construction equipment remain firm. However, there is a shortage of high-quality health care facilities, and most building materials are imported⁵⁴. Altogether, these translate into opportunities which bode particularly well for high-end exports that already have GCC exposure. Concisely, Kuwait is a thriving nation with distinguished expertise present in its private sector. The predominant public sector moves slowly however, and necessitates patience, persistence, and a strong local partner to succeed.



Why Export to The Gulf States

(continued)



Bahrain

Similar to the UAE and Qatar, Bahrain is home to a diverse and multicultural population, with approximately 50% expatriates⁵⁵. It also has complimentary visa policies, regarded as one of the most flexible in the Middle East⁵⁶. The state's strategic position attached to the Arabian peninsula by a land bridge permits easy access to every market in the Middle East. Though oil revenues remain the largest components of GDP, the Bahraini government continuously endeavours to diversify its economy. The non-petroleum portion of its economy continues to grow at rates above historic trends. Areas in which this growth has been most significant include: manufacturing and industrial services, information and communications technology, health care and medical equipment, construction, ports, professional services, renewable energy, and tourism⁵⁷. More recently, the government has begun allocating private investment to improve infrastructure such as, quadrupling the size of Bahrain International Airport⁵⁸, building a second causeway to Saudi Arabia⁵⁹, and connecting all citizens to the fibre-optic network. In comparison to other GCC members, Bahrain continues to be the state with the lowest costs for office rent and industrial land⁶⁰.

The Kingdom of Saudi Arabia

The Kingdom of Saudi Arabia (KSA) is the largest state in the GCC and has a proportional population of 34.8 million⁶¹, of which 22 million are KSA nationals and approximately 11 million are expatriates⁶². Its economy is the largest in the Gulf region, and the country is the only nation in the GCC that is a member of the G-20 group of major economies. KSA is predominantly known for possessing the largest crude oil reserves in the world (16% of the world's total proven petroleum reserves)⁶³, and naturally, it is the largest exporter of this commodity. However, this has resulted in an overdependence on petroleum as it presently accounts for approximately 65% of the country's export revenues⁶⁴. Acknowledging that this is not sustainable, the government of KSA is seeking to bolster its resolve to rely less heavily on a primary-commodity based economy. It is continuously utilising the revenues from the oil and gas sector to support the growth of non-oil sectors, such as infrastructure, construction, education, tourism and manufacturing. Real estate, hospitality and construction are the key areas of opportunity in KSA. With a growing population, increasing urbanisation, stable inflows of religious tourism, and a sharp focus on economic diversification, there is certainly increased investment potential in the country. The government further plans to construct

multiple schools and hospitals in the Kingdom over the next few years. Moreover, there is a significant focus on developing industrial hubs and healthcare facilities that offer investment and business opportunities.

Oman

Located in the south-eastern quarter of the Arabian Peninsula, The Sultanate of Oman is the only member of the GCC passed the Strait of Hormuz facing into the Indian Ocean. It is an oil rich state with an estimated population of 5.1 million⁶⁵, of which almost 44% are expatriates⁶⁶. Over the years Oman has sought to diversify its economy, particularly in tourism, logistics and industrial manufacturing – mainly through their Vision 2020 & Vision 2040 plans. Historically, Oman has always been a trading nation as it benefits from a strategic geographic position and now has the goal of becoming a global logistics hub. The Omani government has set out priority targets for economic development and have appropriately bestowed attractive opportunities in areas including agriculture, fishing, industrial manufacturing, public infrastructure, education, health and tourism.



Get Ready To Do Business in the Gulf States



Travelling

Travel to the Gulf States from Ireland has become much easier in recent years, thanks to direct flights from Dublin through several carriers including Emirates, Etihad, and Turkish Airlines. There are regular daily flights from Dublin to the UAE and Qatar and more are planned. The UAE and Qatar are served by daily flights from Dublin direct to Abu Dhabi, Dubai and Doha. All other destinations require a change of airplane at one of these major hubs. It should be noted however, that due to the recent 'Saudi Blockade' against Qatar, the only way to reach it is through Dublin direct or transiting via Oman or Kuwait. Flights from the other GCC member states to Qatar have been indefinitely ceased and will require stopovers to Kuwait or Oman in order to reach it. Nevertheless, flights between the states pre Covid-19 were very frequent and not overly expensive. This is expected to return to the region post Covid-19. Travel and hotel charges will add to your costs, especially since frequent personal contact is such an important part of doing business in the region.

In the Gulf, Islamic principles and social customs are widely observed, with some divergence in religious observance and customs between the different States. Irish business people should approach the Gulf market with respect for that culture, and a clear understanding that it is different to that of the West. Arabs won't expect first-time visitors to fully understand all the nuances, and the differences shouldn't be seen as intimidating. Respect and patience will take you far, and in many ways the Arab style of doing business is closer to the Irish than you might think. The ability to strike up a personal rapport and build a relationship is a key part of doing business in the Gulf. Personal relationships are valued above all in business. Conducting yourself properly and in a formal manner will help you to make progress, as will showing a healthy inquisitiveness about your potential business partners culture.

Given the importance of relationships, regular presence in the market by senior members of a company's management is essential to winning business in the Gulf. Over 15,000 Irish live in the Gulf; with between 10-11,000 residing in the UAE, 3,000 to 3,500 in Saudi Arabia and over 2,000 living in Qatar.⁶⁷

In light of global travel restrictions, we are advising all clients to regularly review the Government of Ireland advice at www.gov.ie/, travel advice from the Department of Foreign Affairs, business continuity advice from the Department of Enterprise, Trade and Employment and the World Health Organisation website.



Geography

The United Arab Emirates are situated between the Kingdom of Saudi Arabia and Oman, where the locally named Arabian Gulf narrows to the Straits of Hormuz. The two key emirates, Dubai and Abu Dhabi, are separated by 120km of good roads which are easily travelled by car. During Irish Summer time Qatar, Kuwait and Saudi Arabia are two hours ahead of Irish time, while the UAE is three hours ahead. During Irish winter time the Arabian Gulf does not put its clock back and as a result an extra hour must be added to the time difference.



Language

While Arabic is the official language of all the GCC states, the business language is English. With the proliferation of expats and MNCs establishing themselves in the gulf over the years, English has become the main form of communication. However, there are several nuances in the way Arabs prefer to communicate that are essential to know for any Irish company looking to establish a presence in this market: Arabs prefer face-to-face meetings over communicating by email, phone or letter, and at the start these encounters are about establishing a rapport and gauging mutual trust.



Get Ready To Do Business in the Gulf States

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- Expect the early part of the conversation to be dominated by small talk as your Arab host gets to know you better.
- Arabs like to be addressed by their official title – this may be ‘doctor’ or ‘engineer’.
- If someone has an elevated position such as Ambassador, or Head of a Government Department, you would address them as ‘Excellency’.
- Many Gulf Arabs have a relaxed approach to timekeeping. While you may be kept waiting, however, you should make a point of always arriving for meetings on time.
- Meetings with Arabs in the Gulf can be unstructured. When you arrive, it’s not uncommon to find other people in the room at the same time.
- Meetings generally take longer than in Ireland and may be interrupted by phone calls or drop-ins. This is considered normal.
- It’s good practice to make follow-up calls after a meeting. This is important in building the relationship.
- If you are making follow-up phone calls, avoid doing so at prayer time. Prayer times are printed in the daily newspapers and online.



ROUTES TO THE MARKET

As an Irish company, your main route of entry to the Gulf will most likely be through a local partner or agent. In most cases, only early business development or post-sales customer service can be carried out from Ireland.

Keeping in touch with the market remotely offers several challenges, but these can be overcome provided you are willing to be flexible. The time difference of three hours in Qatar and Kuwait, and four in Abu Dhabi and Dubai, should be factored in to dealings between locals and your Irish base. More importantly, you should be aware that there will be an overlap in weekends when organisations in the Gulf will be out of contact. This is on Fridays and Saturdays in Kuwait, Qatar and the UAE. That cuts both ways: stories are not uncommon of customers in the Gulf looking to reach their Irish suppliers on a Sunday morning. For most Irish companies, supplying directly from Ireland is not a practical option and you will need to work with a local partner.

Throughout the Gulf countries, working with a local partner is compulsory when dealing with Government contracts, as the various States still retain control over most sectors. Even where you are selling to a family-run private business, a local agent is often required to facilitate the deal. The

advantage to this arrangement is that the distance from Ireland and the cultural differences mean your business can benefit from an experienced partner who knows the territory and has the right contacts. That is particularly important if you sell in a sector where your potential customers come from a large group, or in a company where the decision-makers are not so easily accessible without the right introduction. Partners can also assist with obtaining visas and work permits where necessary.

In the Gulf States, it can be difficult and expensive to dissolve agreements, either written or implied. This makes it essential to ensure you are working with someone you can trust and one who can deliver what they promise.

In sectors where there are fewer potential customers that are easy to identify, it may be possible to meet with the decision-maker in that organisation as part of the business development stage. You could respectfully ask if they have a preferred partner who could work with your company on the contract. This allows you to comply with local regulations and may fast-track your own progress. However, you should always follow up any recommendations with checks of your own.



Get Ready to Do Business in the Gulf States

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When appointing a partner:

- Find out whether the partner can provide the levels of access to customers that they claim.
 - Seek out the advice of multinationals, locally based professional services firms, or trusted business colleagues who may recommend a company for you.
 - Suggest a short-term engagement initially so you can more closely gauge the partner's effectiveness.
 - Clearly define roles and responsibilities of each party before working together.
 - Beware of using terms like 'exclusive' in contracts. Regional exclusivity is not recommended as family networks are a key part of conducting business in the Gulf.
 - Where you are required to do business through a partner or agent, this should preferably be a local who is well connected.
 - Don't sign agreements with anybody until you are sure they are someone you can do business with, as extricating yourself from a contract can be difficult and expensive.
- Don't give exclusive rights for all business activity on an ongoing basis. Instead, try short trial periods with measurable outcomes to test the working relationship.
 - If you are entering into an agreement for one project, very carefully identify the collaboration for that specific activity and that specific contract.

Helping you win in the Gulf States

Enterprise Ireland's office in Dubai can provide lists and contact possible agents or representatives in the market. It can also broker contacts with business accelerators – experienced consultants with contacts and expertise in a particular sector who now provide their services to companies looking to sell into the region, or a subset of it. Some funding may be available to retain the services of a business accelerator. However, this is usually for a fixed term and you should set aside sufficient funding to continue working with this consultant beyond the initial contract in order to keep up momentum in the market.



Things to Consider

Each GCC country has its own traits and traditions, meaning that while they are very closely linked and often similar, there are things that will work in one country and not in another. This needs to be considered when proposing your product to each market and the following questions and considerations can help guide you in your exporting decisions.



Market landscape

What is the size of your target market? Is it dominated by a few strong players or fragmented with many small competitors? The Gulf states are made up of several different countries taking up a large geographic region. These countries have varying entry channels which cannot all be targeted the same way. Irish businesses should carefully consider where and how to enter this market. Exercising efforts on one country at a time and allocating resources accordingly is key to success. Finally, having a local presence in the market is essential; meeting cancellations are common and being available to meet with Arab prospects within a moment's notice is vital. Commitment and patience are the main success factors in a market where decisions and deals take months to reach.



Market trends

What are the current market trends for the sectors you will be targeting? Depending on the country, it is important to know if its market is in line with global trends or is ahead/behind the norm. If there is an obvious gap in the market, find out why - it may exist for a reason.



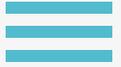
Market research

Irish SMEs that fail in the Middle East fall in a common pothole – lack of market knowledge. Spending time conducting relevant market research will help you decide which Gulf State is a suitable target market for your product / service. It will also help develop your market knowledge which will enhance your credibility when speaking with Arab buyers. In addition, identifying competitors, understanding cultural nuances and refining your marketing messages for Arabic and local conditions is essential.

Enterprise Ireland's Market Research Centre offers client companies access to market intelligence in the form of company, sector, market, and country information to explore opportunities and compete in international markets. Enterprise Ireland's website is a good source of more detailed market information. The Market Research Centre section features a database of sector-specific information that will indicate whether there is research available for the market you wish to target.

For more information visit:

www.enterprise-ireland.com/en/Export-Assistance/Market-Research-Centre/



Going Global

Things to Consider

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Market segmentation

The Gulf States should be considered separate and distinct markets as they are culturally different, with the UAE, for example, having a particularly Westernised business environment. It is important that companies have a clear understanding of where their niche lies. Who are your most probable customers, where are they located, how and what else do they currently buy, who are their influencers and what “need” are you fulfilling?



Boots on the ground

While it is customary for initial introductions and discussions to be made via email/telephone/video call in most other markets, this is not always the way business is conducted in the Gulf States. It is essential to travel to the marketplace to develop relationships with potential buyers. Arabs must be allowed to develop their trust in you and need to see commitment in the marketplace ideally through a local point of contact. An in-market visit and attending industry specific trade fairs is recommended to get an understanding of the opportunity and identify the right strategy for market entry.



Key Growth Opportunities in The Gulf States



Education

The Gulf States have a long history of sponsoring students to travel to Ireland mainly for medical studies. However, over the years this has been extended to other disciplines such as architecture and engineering. There are over 3,000 Middle Eastern students sent to study in Ireland on a yearly basis. Of this figure, Saudi Arabia and Kuwait are the two main countries from which these students come from. A significant amount of these students are sent to study at the Royal College of Surgeons in Ireland (RCSI).

agriculture solutions and technologies. Significant investment and financial incentives are being pumped into domestic and international companies that bring with them agritech solutions. This combined with Ireland's rich knowledge and capabilities in agriculture has meant that Irish agritech companies have been highly successful in securing contracts in this region. Key areas of opportunity for Irish companies include:

- Adaptive Irrigation Solutions
- Animal/Crop Monitoring/Sensors
- Automation
- Farm Equipment and Sheltering
- Feed Systems
- Veterinary Pharmaceuticals and Supplies
- Livestock Management

- Construction and Engineering Services
- ICT and IoT Solutions
- Marine Environment Monitoring
- Service Vessels and Equipment
- Security and Access Control
- Materials Handling

Ports are a major focus for policy makers in the Middle East. In all new strategic plans, which set out national objectives, there is a specific focus on increasing trade capacity for both national and international sea trade. Increasing efficiency is also a major focus as the Gulf States look to stay ahead of the curve internationally and take full advantage of their geographic location linking Europe, Africa and Asia.



Agritech and Food Production

The Middle East's rich abundance of crude oil, hydrocarbons and natural resources coincides with a region that is characterised by arid land, water scarcity and food insecurity. The region has a high dependence on food imports; the UAE alone imports approximately 90% of all its food. While traditional farming methods have not been straightforward to implement or to replicate in this region, the Gulf States remain determined to innovate and augment their agricultural capabilities. They are mainly turning their attention towards advancements and growing trends in sustainable



Infrastructure Development, Logistics and Maritime

Significant investment across the region in port infrastructure, digitisation of ports and increased levels of seaborne trade make it an attractive sector for Irish companies to offer their innovative solutions. There is a wide array of Irish companies in this space covering:

- Navigation and Safety



Healthcare

Growing expat (and in particular, Western expats) populations are providing market impetus for higher standards of health care provision. Well documented in the local media is the impact of the rapid growth of diseases such as cancer and diabetes, the latter a root cause of many other afflictions. Additionally, the UAE, KSA and Qatar are in the top 10 most obese countries in the world. There is copious evidence that in Western societies where lifestyle diseases have led directly



Key Growth Opportunities in The Gulf States

(continued)



by necessity to healthcare investment, the same factors are prevalent in the Middle East.



ICT

The regional governments of the Gulf States are investing heavily in their IT infrastructures and Irish products have a strong competitive edge. While all countries in the region are upgrading their IT infrastructure, they present several opportunities for Enterprise Ireland's ICT companies. The UAE and Qatar, despite their small populations, are among the highest per capita income countries in the world and have very ambitious development and modernisation plans presenting significant opportunities to ICT companies. Several of the Gulf States are employing e-government expansion initiatives which include the setting up of an integrated electronic portal linking family care, charity, medical and social welfare services alongside the implementation of security systems to safeguard individual data. In addition to these, other opportunities to Irish companies include:

- Unified Commercial Registration
- Consumer Protection Portal

- Compliance requirements for financial institutions
- Data security and training



Aviation

The growing number of airport expansions, planned and under way, opens up new opportunities to Irish companies. Key areas of opportunity and success for Irish companies are:

- Aircraft Maintenance and Overhaul
- Inventory Management
- Cabin Interiors
- Talent Management
- Ancillary Revenue Optimisation



Financial Services and Software

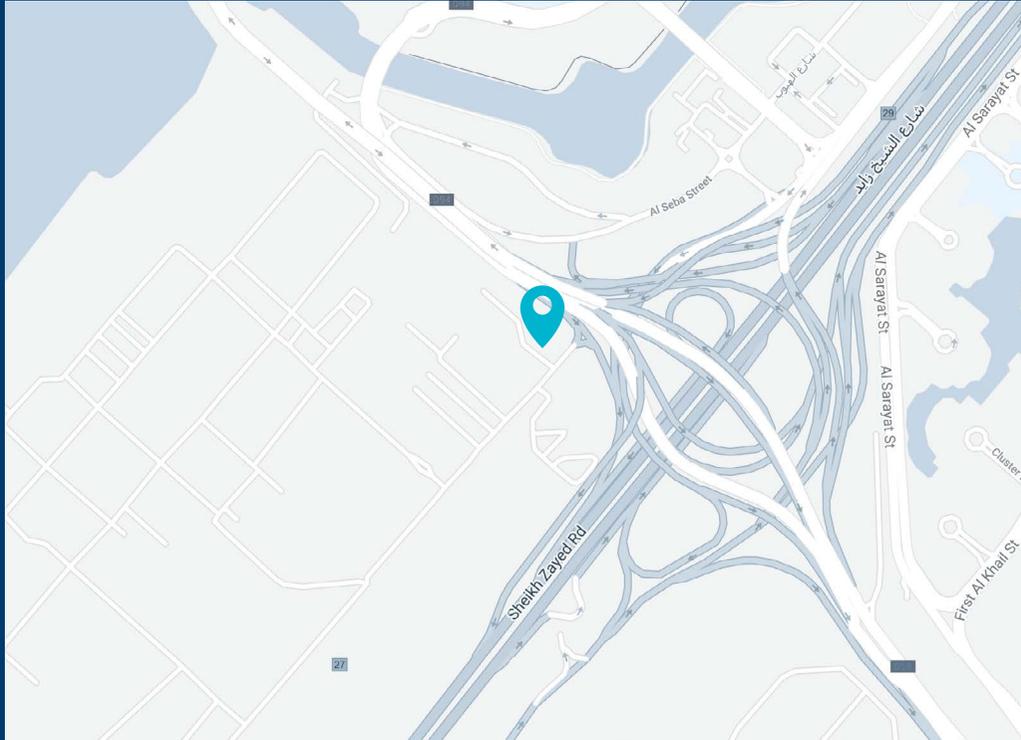
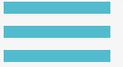
The UAE, Qatar and Bahrain have significantly developed a Fintech ecosystem while the other Gulf States have begun developing their digital economies considerably over recent years. Qatar and the UAE are in constant competition to establish themselves as the Middle East's regional financial hub. The significantly large number of banks operating within these two countries and the wider Gulf region has led to constant competition around the area of fintech and efforts to increase competitive advantage.

Popular technologies in this field are:

- Payments systems
- Omni-channel banking software
- Aptitude & skill testing software for recruitment across sectors
- Identity assurance and authentication software for online, mobile and ATM banking
- Dynamic Currency Conversion for credit card
- Financial & Cash Management Systems
- eLearning & Knowledge Management platform



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