

From Oil Economies to Knowledge Hubs: GCC Higher Education and Skilled Migration

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Executive Summary

Over the past three decades, GCC countries have transformed their higher education sectors through rapid expansion, private-sector participation, and the establishment of foreign branch campuses as part of broader efforts to shift from oil-based economies toward knowledge-based development. This policy brief examines how these changes have increased educational choice, strengthened international competitiveness, and positioned higher education as a strategic tool for attracting and retaining skilled migrants. National development strategies increasingly place education at the center of efforts to strengthen human capital, innovation, and long-term economic diversification.

The brief highlights the rise of private institutions, transnational education partnerships, and government efforts to strengthen quality assurance through accreditation systems and international benchmarking. It also explores the growing link between higher education and skilled migration: strong educational systems can attract international students, researchers, and professionals, especially when paired with clearer residence and employment pathways. The UAE represents the most advanced example of this approach, combining world-class educational offerings with student visa reforms, Golden Visas, and ambitious plans to become a global education hub. At the same time, the model faces important constraints, including rising education and housing costs, uneven graduate employment prospects, and regional geopolitical uncertainty.

Overall, the brief concludes that higher education has become a central pillar of GCC competitiveness and talent strategy. To sustain this model, governments should complement education reforms with practical support measures: making schooling, student accommodation, and family housing more affordable; improving transport and related infrastructure to reduce indirect costs; aligning residency reforms with labor-market opportunities for graduates; and strengthening incentives for expatriate families and highly skilled migrants. These steps would help ensure that education policy continues to support talent retention, demographic diversification, and post-oil economic transformation across the region.

1. Introduction

Over the past three decades, GCC countries have transformed their higher education sectors through private-sector participation and the establishment of foreign branch campuses. Driven by economic diversification strategies and growing expatriate populations, the region has developed one of the world's most dynamic higher education markets, with education increasingly viewed as a pillar of knowledge-based development.

This brief examines the growth of the tertiary education sector in the GCC, focusing on the expansion of private institutions driven by rising expatriate populations and the broader push to build knowledge economies. It also highlights increasing competition among education providers, alongside significant government initiatives aimed at enhancing educational variety, accessibility, and quality. The analysis further explores how several GCC states have implemented regulatory frameworks to ensure quality standards across institutions. In parallel, some states have developed strategic agendas to position themselves as global education hubs, seeking to attract international students, skilled professionals, and long-term residents through diversified educational offerings. The brief also considers how education policies intersect with broader economic diversification and nation-branding strategies in the region. Finally, it offers a set of policy recommendations that take into account the current political and economic dynamics shaping the Arabian Gulf.

2. The Expansion of the Education Sector in the GCC

Bahrain provides an early and illustrative case of education sector development in the Gulf. The Kingdom established one of the region's first public education systems in 1919, initially offering free elementary education to boys before expanding to include girls in 1928 (Nydell, 2002). Secondary education followed in stages, with provision for boys beginning in 1936 and for girls in 1951. The expansion of international education also began relatively early, with the establishment of St. Christopher's School in 1961 to serve a growing expatriate population, growing from an initial cohort of 30 students to over 2,300 (St Christopher's School, n.d.). Until the late 1960s, Bahrain lacked domestic higher education institutions, requiring students to pursue tertiary education abroad.

The development of tertiary education, encompassing both academic degree-granting institutions and vocational training, has unfolded in two distinct phases, has since unfolded in two distinct phases. The first phase, from the late 1960s to the mid-1980s, was state-led and culminated in the establishment of the University of Bahrain in 1984 through the consolidation of earlier public institutions, including the Teachers College (1966), Gulf Technical College (1968), the College of Health Sciences (1976), and the College of Arts, Science and Education (1979) (Madany et al., 1988).

The second phase, beginning in the 2000s, has been characterized by rapid growth in the provision of private education, enabled by sector liberalization and regulatory reforms. Over the past two decades, 14 private institutions have been established, alongside the opening of Bahrain Polytechnic in 2008 as a public institution focused on technical education. This expansion has been facilitated by policies allowing 100% foreign ownership and relatively low capital requirements, reflecting broader regional trends toward the diversification and privatization of tertiary education across the GCC.

Table 1. The Growth of Tertiary Education Institutions (TEIs) in the GCC

Country	First public school estd.	First TEI estd.	# of TEIs in 2025
Bahrain	1919	1968	20
Kuwait	1911	1966	12
Oman	1940	1986	38
Qatar	1947	1973	33
Saudi Arabia	1943	1949 (sharia college), 1957 (university)	88
UAE	1930	1976	77

Source: Compiled from Ministry of Education, Kingdom of Bahrain (n.d.); Ministry of Education, Kuwait (n.d.); Ministry of Education, Oman (n.d.); Ministry of Foreign Affairs, State of Qatar (n.d.); Ministry of Education, Saudi Arabia (n.d.); and Government of the United Arab Emirates (n.d.).

The second wave of tertiary education expansion in the GCC should be understood within the broader context of the globalization of education services. The liberalization framework introduced under the General Agreement on Trade in Services (GATS) facilitated cross-border provision of education through multiple modes, including institutional mobility and the establishment of foreign branch campuses (WTO, 2005). This regulatory shift enabled GCC states to open their education sectors to international providers, thereby expanding educational offerings, addressing capacity constraints, and fostering innovation through transnational partnerships (Martin, 2007). The UAE was an early adopter of this model, hosting the region's first foreign branch campus with the establishment of the University of Wollongong in Dubai in 1993. In contrast, Qatar pursued a more state-directed approach through the Qatar Foundation, strategically inviting leading global universities to establish campuses in Education City, supported by substantial public investment and incentives (Pollock, 2007). As a result, international education provision has expanded significantly, with more than 70 foreign branch campuses currently operating across the GCC and further growth anticipated (Bollag, 2024; Pavan, 2025; Husain, 2025).

This expansion has been driven not only by rising demand for tertiary education, which is now widely perceived as essential for labor market participation, but also by demographic dynamics linked to migration. The growth of expatriate populations has generated sustained demand across all levels of education, particularly for private institutions offering international curricula aligned with students' countries of origin. In many cases, skilled migration has been accompanied by family relocation, reinforcing demand for diversified schooling options. Over time, the relative permanence of expatriate communities has further shaped education systems, with evidence of multi-generational non-national populations emerging in some GCC states (Lori, 2019). For example, research in Kuwait indicates that a notable proportion of non-nationals were born in-country, with some families spanning multiple generations, underscoring the structural role of expatriate communities in driving long-term demand for education services in the region (Shah, 2013).

Table 2. The Growth of the Expatriate and National Population in the GCC

Country	Population around 2000 (millions)	% Nationals (around 2000)	Population 2022 (millions)	% Nationals (2022)
Bahrain	0.65 (2001)	62.4%	1.52	46.8%
Kuwait	2.22 (2000)	38.0%	4.59	32.7%
Oman	2.34 (2003)	76.1%	4.73	59.9%
Qatar	0.80 (2004)	24.1%	2.88	12.1%
Saudi Arabia	22.68 (2004)	72.9%	32.18	58.4%
UAE	4.11 (2005)	20.1%	10.29	12.9%

Source: Compiled from demographic statistics published by the Gulf Labour Markets, Migration and Population (GLMM) Programme (GLMM, 2014; GLMM, 2025).

Schools were established to address these growing student numbers and curricular needs. The Emirate of Dubai is a good example of this phenomenon. As of late 2025, Dubai has 227 private schools, with over 90% of all schools in the emirate privately operated, compared with only a small number of public institutions (Knowledge and Human Development Authority [KHDA], n.d.). This, in turn, has led to the emergence of one of the most complex educational systems from the perspective of licensing and regulation. The school system in Dubai comprises three main segments: UAE government schools, private schools, and the newer Dubai Schools initiative. Government schools primarily serve UAE nationals and GCC citizens, offering free education in Arabic from early years through Grade 12, while expatriates may enroll under strict conditions, including fees, academic performance requirements, and a capped quota. In contrast, private schools

dominate the sector, offering a wide range of 17 international curricula alongside some Ministry of Education programs. Complementing these is the Dubai Schools initiative, launched in 2021 as a public–private partnership with Taaleem, aiming to provide high-quality, affordable education rooted in Emirati values such as tolerance, inclusivity resilience and determination, while following an American curriculum (Knowledge and Human Development Authority [KHDA], n.d.). With multiple campuses and priority access for Emirati students, Dubai Schools reflect an effort to blend national identity with global educational standards in a rapidly diversifying system.

3. Path towards National and International Quality Rankings

A key driver of education sector transformation across the GCC has been the introduction of long-term national development strategies, often articulated through “Vision” frameworks. These policy agendas, such as Bahrain Economic Vision 2030, have positioned education as central to economic diversification and the transition toward knowledge-based economies. Across the region, such strategies emphasize the need to enhance quality standards, strengthen institutional accountability, promote research and innovation, and align educational outcomes with labor market demands (BEDB, 2008). As a result, education reform has increasingly focused on system-wide performance evaluation, curriculum relevance, and the integration of skills required for emerging economic sectors. However, the rapid expansion of education systems, particularly in the tertiary sector, has also generated structural challenges. Strong demand for higher education, combined with liberalization policies, has at times outpaced regulatory capacity, raising concerns about quality assurance, faculty qualifications, and institutional oversight. Early phases of expansion in some GCC states revealed gaps in supervision, including cases of non-compliance with academic standards and licensing requirements (Martin, 2007; Toumi, 2009, 2010). These challenges are not unique to the region and reflect broader risks associated with the commercialization and internationalization of education, including concerns about profit-driven provision and variable quality among foreign branch campuses (Hatakenaka, 2004). In response, GCC governments have progressively strengthened regulatory frameworks through the establishment of accreditation bodies and quality assurance mechanisms aimed at standardizing provision and ensuring closer alignment between higher education outputs and national development priorities.

Table 3. TEIs Accreditation Mechanisms in the GCC

Country	Accreditation body	Year estd.
Bahrain	Quality Assurance Authority for Education and Training (QAAET)	2008
Kuwait	National Bureau for Academic Accreditation and Education Quality Assurance (NBAQ)	2010
Oman	Oman Academic Accreditation Authority (OAAA)	2001 (renamed in 2010)
Qatar	National Committee for Qualifications and Academic Accreditation (NCQAA)	2022
S a u d i Arabia	National Center for Academic Accreditation and Evaluation (NCAAA)	2004
UAE	Commission for Academic Accreditation	1999

Source: Compiled from local Ministries of Education websites.

In addition to national accreditation frameworks, international university rankings have emerged as influential instruments of quality assessment and benchmarking across the GCC. Institutions increasingly engage with global ranking systems such as the Times Higher Education and QS World University Rankings, as well as region-specific frameworks like the QS Arab Region University Rankings, to evaluate performance and signal competitiveness. These rankings typically assess a combination of indicators, including academic reputation, employer perception, research output, and internationalization, and align closely with national policy priorities to develop knowledge-based economies and enhance global integration. The growing emphasis on rankings has contributed to a more performance-driven higher education landscape, with universities adopting targeted strategies to improve their metrics and international visibility. Regional benchmarking, in particular, has enabled institutions to measure progress against context-specific criteria while reinforcing competitive dynamics within the GCC. Recent milestones, such as the inclusion of Saudi Arabia's King Fahd University of Petroleum & Minerals among the top 100 globally, illustrate the tangible outcomes of these efforts (Nabeel, 2025). At the policy level, governments increasingly incorporate ranking performance into institutional development plans, using it as a proxy for quality, global standing, and the effectiveness of higher education reforms (Khoury et al., 2025 ; WAM, 2026).

Beyond regulatory needs, several GCC states have recognized the strategic importance of high-quality education as a means of transforming their societies by developing high-performing human capital. Selected Western universities were invited to open branch campuses in the region to enhance educational offerings. While the strategy implemented by the Qatar Foundation, targeting high-ranking American institutions to open branch campuses, was the earliest in the region, the Emirate of Abu Dhabi implemented a similar strategy in the mid-2000s when NYUAD and Sorbonne University partnered with the Abu Dhabi government to open their campuses in the capital (WAM, 2007). Saudi Arabia, on the other hand, adopted an accelerated educational strategy through the establishment of King Abdullah University of Science and Technology (KAUST), a well-funded, research-intensive, graduate-only institution designed to rapidly build advanced scientific capacity without relying on traditional university structures. KAUST is frequently likened to an “Arab MIT” because of its strong emphasis on research, and it actively recruits talent and collaborates with leading scholars from globally renowned universities such as MIT, Harvard, and Yale (Hassan, 2014). Unlike other GCC states, the Kingdom has only recently allowed foreign branch campuses to establish a presence, with the University of New Haven expected to open its Riyadh campus in Fall 2026, making it the first foreign university campus on Saudi soil (Pavan, 2026). These differences among the GCC states in the approaches towards transnational higher education are summarized in the table below.

Table 4. Foreign Branch Campuses in GCC Countries

GCC Country	Approximate Number of Foreign Branch Campuses	Notes
UAE	50+	
Qatar	12	Texas A&M Qatar Campus to close by 2028
Saudi Arabia	The first campus is to be established in Fall 2026	
Bahrain	5	
Kuwait	5	Kuwait is the headquarters of Arab Open University that has multiple branches in the Middle East
Oman	~8–10	Established through franchises/partnerships (not as independent campuses)

Note: Numbers are approximate because definitions of foreign branch campuses vary.

The UAE and Qatar dominate the GCC's transnational higher education landscape and have emerged as the region's principal hubs for foreign branch campuses. As of 2015, the UAE hosted approximately 31 international branch campuses, ranking second globally after China (Bridi, 2020). The UAE's higher education market subsequently evolved into one of the world's most competitive and saturated transnational education environments, with over 100 licensed higher education institutions operating in a country of fewer than 10 million inhabitants (Wilkins & Huisman, 2021). Within the UAE, Dubai International Academic City reportedly accommodated around 40 branch campuses, while Dubai Knowledge Park hosted approximately 15 international branch campuses (IBCs) and more than 150 training institutions (Bridi, 2020). According to Wilkins and Huisman (2021), late-arriving branch campuses in the UAE increasingly relied on differentiation strategies centered on institutional reputation, employability, niche specialization, and the targeting of specific expatriate communities, particularly Indian, Pakistani, Arab, and Russian-speaking populations. Similarly, Education City in Doha developed into one of the world's most concentrated branch-campus clusters, hosting around 11 international university campuses affiliated with leading Western institutions (Bridi, 2020). UNESCO UIS data demonstrated that the UAE and Qatar developed particularly strong inbound international student mobility profiles, with inbound mobility rates reaching approximately 44.8% and 39.9%, respectively, reflecting their emergence as regional hubs for transnational higher education and foreign branch campuses (UNESCO, 2016).

The continued improvements in the educational system and institutions that meet global standards offer possibilities beyond serving national and expatriate needs. Some GCC countries recognized this opportunity to become global education hubs and attract students.

4. Global Educational Strategies and Migration: The Case of the UAE

In recent years, individual GCC countries have adopted different policies regarding the extent to which they welcome expatriates and grant them long-term residence. Among the GCC countries, the UAE has been at the forefront of such reforms. In May 2018, the introduction of new long-term residency visa options targeting investors and specialists was announced with 10- and 5-year residency available to qualifying individuals and their families. Within this framework, the UAE has also acknowledged that retention of outstanding students and migration to the UAE for educational purposes offer another opportunity to attract talent to the country. In November 2018, the government introduced five-year student visas to support talent retention beyond graduation (Shahbandari, 2018). This was followed in 2019–2020 by the launch of long-term Golden Visas, granting up to 10 years of residency for outstanding students and researchers. As of 2026, the system

includes renewable one-year student visas (typically university-sponsored), alongside extended five- and ten-year residency options for individuals meeting high-achievement or accredited institutional criteria (Government of the United Arab Emirates, 2026). Golden Visa recipients in the education sector are predominantly high-performing school students, who constitute the largest group with 10,710 recipients. This is followed by 5,246 university graduates from accredited local and international institutions, indicating a strong policy focus on retaining top academic talent at both secondary and tertiary levels (Ali, 2025). As an example of an international educational hub, the NYUAD campus alone welcomed 530 students from 87 countries, with the largest groups coming from Kazakhstan, Pakistan, the United States, India, and South Korea. Overall, the institution brings together a student body representing more than 115 nationalities (New York University Abu Dhabi, 2026). Many UAE-based universities offer a wide range of scholarship opportunities for international students, including partial merit-based tuition reductions and fully funded packages covering tuition fees, accommodation, and additional living support. UAE nationals are eligible for fully funded spots and dedicated merit scholarships at federal public institutions and for tuition waivers at private institutions, depending on the criteria.

A further enhancement to this strategy was spearheaded by the Emirate of Dubai. The Education 33 (E33) agenda, announced in 2023, aligns with the broader Dubai Economic Agenda (D33) to double the size of the economy by 2033 by fostering a knowledge-based economy and developing a skilled workforce. It also supports the Dubai Social Agenda 33, which aims to create a proactive, sustainable education system and to position Dubai among the world's top 10 cities for education by 2033 (Government of Dubai Media Office, 2024). The policy framework is operationalized through a set of goals and targets, including expanding access to affordable education, increasing the participation of Emirati teachers, and strengthening the role of private and international institutions. Notably, the strategy also introduces objectives related to education tourism and attracting foreign universities, reflecting a broader ambition to position Dubai as a regional education hub.

5. Conclusion and Recommendations

Within this policy context, education systems in the GCC are no longer solely reactive to economic transformation and demographic pressures; they are increasingly deployed as proactive instruments of talent attraction and retention. High-quality, internationally competitive education provision can function as a pull factor for skilled migrants, particularly when combined with pathways for long-term residence and employment. In the UAE, for example, the presence of globally benchmarked schools and universities contributes to family relocation decisions, positioning education as a central component of broader talent retention and human capital strategies. This dynamic creates a reinforcing

cycle in which strong education systems attract mobile professionals, whose presence in turn supports knowledge transfer, innovation, and labor market development. The longer-term settlement of expatriate families generates additional economic spillovers, including increased foreign direct investment, growth in research and entrepreneurship ecosystems, and sustained demand in real estate and infrastructure sectors. This model may offer a template for other GCC states seeking to enhance their competitiveness as global talent hubs. Furthermore, by integrating education with long-term residency schemes and graduate employment opportunities, GCC states are increasingly attempting not only to attract international students and professionals, but also to retain them as part of broader knowledge-economy and demographic diversification strategies.

However, its sustainability depends on addressing structural affordability constraints. Rising costs of education, housing, and associated services risk limiting access and reducing the attractiveness of relocation for middle- and even high-skilled migrants. Policy responses, therefore, need to extend beyond institutional quality to include affordable schooling options, student accommodation, and family housing, as well as efficient public transportation systems that reduce indirect costs such as school transport fees. These considerations become particularly critical during periods of economic uncertainty, when cost pressures may prompt partial family relocation or reverse migration, undermining long-term talent retention objectives. The long-term residency, while an important step towards longer settlement, must also work hand in hand with the creation of labor-market opportunities to absorb graduates; it is also an important factor in enabling second- and third-generation expatriates to remain in the country. Regional political stability, which until recently made the GCC be perceived as a beacon of stability in an otherwise volatile region, has been shattered by the US-Israel war with Iran. Offering further incentives may be required to stimulate new expatriate relocations with their families.

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