

Policy Report

Special Issue

*Stepwise and Return Migration between the Gulf,
Europe and North America – How do GCC Countries
Fare in the Global Competition for Talent?*

No. 8

A National Security Turn?

Stepwise Migration of Skilled Labour and National Security Dilemmas in the Gulf

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Executive Summary

Following the post-COVID-19 period (2020–present), most Gulf states have increasingly intensified efforts to liberalise domestic migration management processes – particularly for skilled labour migration – through tactical reforms such as long-term legal residency pathways (i.e., UAE's Golden Visa, Saudi Arabia's Premium Residency) and self-sponsorship (i.e., freelancing visas, digital nomad visas). Yet, despite such tactical labour migration policy reforms, Gulf states continue to face challenges in attracting and retaining skilled migrant populations, which are central to long-term economic diversification and national security planning.

This policy report argues that the stepwise migration of highly skilled migrant workers from the Gulf to Europe, North America, and beyond increasingly constitutes a national security dilemma and undermines the human capital foundations and labour supply of economic diversification strategies, therefore impacting the evolving social contract that underpins state service delivery, competitiveness, and regime objectives in the Gulf. Drawing on a comparative analysis of Saudi Arabia and the UAE – which collectively host at least 70% of the region's temporary labour migrants, including skilled migrant talent – the policy report traces how stepwise migration is being reframed from a labour market management problem to an economic security concern with strategic implications for national security governance and planning.

More specifically, it focuses on Gulf healthcare as a case study to underscore why retention is not simply a workforce issue. When high-skilled migration dependence is structurally rooted and turnover is high, states tend to swiftly translate stepwise migration into national service capacity risks, higher replacement costs, and institutional resiliency challenges that can become politically salient in Gulf rentier systems where public service provision is linked to the prevailing social bargain between regimes and citizens. Using current policy analyses, semi-structured interviews, and fieldwork observations, the report emphasises the following key findings: First, the Gulf states' reformist turns reveal growing intra-Gulf and external competition for skilled migrant labour and an emerging 'security framing' of human capital losses. Second, stepwise migration pressures in the Gulf are particularly evident in critical sectors (e.g., healthcare, AI), where the projected imbalances and retention constraints exacerbate governance risks. Last, socio-legal reforms (i.e., labour mobility, visas/residency, and social policy liberalisation) are

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tactically instrumentalised as national security tools to manage the supply of human capital talent. Ultimately, the report concludes with targeted policy recommendations aligned with these national security governance gaps and sectoral pressures.

Introduction

Since the early 2000s, Gulf states have become the primary regional hosts of temporary labour migrants from the Global South, structurally dependent on them, including to fill private sector (and some freezone and public sector) employment.¹ As the Gulf states have invested in modernising their economies and globalising their engagements – exemplified by hosting mega-events such as the FIFA World Cup and Expo 2022 – they have also sought to attract and retain skilled migrant labour talent, transforming the Gulf into regional cosmopolitan ‘talent hubs’ tied to long-term economic diversification and development ambitions.² Yet, despite a diverse range of socio-legal reforms (i.e., such as kafala labour reforms linked to internal labour mobility, residency-by-investment, and skill-based long-term residency pathways), there is growing evidence of stepwise migration of skilled migrant populations from Gulf-based industries to the Global North (Europe, North America) and beyond,³ particularly in the healthcare sector. Moreover, highly tiered pathways to permanent residency and citizenship, along with wage-based discrimination by nationality (the ‘citizenship penalty’), have reinforced skilled migrants’ decisions to leave Gulf states for other high-income destinations offering easier citizenship and residency options, such as Europe and North America.⁴ Ultimately, these stepwise migration concerns have not only impacted Gulf states’ domestic migration management approaches towards highly skilled migrants but also contributed to a ‘national security turn’ in which the loss of significant human capital is increasingly viewed as a critical threat to long-term economic security and diversification objectives.⁵

The policy report is structured as follows. First, it contextualises the stepwise migration of highly skilled migrants as a national security challenge vital to Gulf states’ domestic and geopolitical ambitions, with a sectoral focus on the healthcare industry. It then examines the Gulf states’ socio-legal strategies for attracting and retaining highly skilled labour migrants. The concluding section offers recommendations to address this emerging national security concern in the Gulf.

Methodology

This policy report draws on both primary and secondary sources, including a desk-review analysis of peer-reviewed academic and policy research on Gulf labour markets and skilled migration in Saudi Arabia and the UAE. It also employs primary interviews with five Gulf migration experts and a hospital administrator to substantiate the analyses; these interviews were pseudo-anonymised to protect the personal and institutional privacy and confidentiality of participants. Using a qualitative, interpretive approach, the stepwise dynamics of skilled labour migrants have been tracked and linked to shifts in policy framing, especially as Gulf states are increasingly elevating stepwise migration from a labour market management problem to an economic and national security concern.

Stepwise Migration as a National Security Turn

National security is broadly defined here as the protection of a nation’s sovereignty, its citizens and non-citizens, institutions, and policy interests from diverse threats, including economic instability and labour market vulnerabilities.⁶ The Gulf states’ economic diversification strategies also rely on skilled migrant workers, making their retention of human capital a critical security concern; without these skilled migrant populations, Gulf states will likely face exacerbated labour shortages and compromised

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competitiveness.⁷ Within this framing, stepwise migration takes on political economy significance because governance legitimacy and long-term development visions rely on states' capacity to sustain economic performance and deliver critical services at scale. This political economy dynamic is evident in the Gulf healthcare sector, where the retention of skilled workers intersects with the prevailing rentier bargain and the broader social contract between Gulf regimes and their citizens, making sustained human capital outflows more than a firm-level staffing problem.

Over the past half century, Gulf states' traditional approaches to highly skilled labour migration have shifted from a *laissez-faire* stance to a more reformist one in response to growing intra-Gulf and inter-regional competition with Global North states for labour migrants.⁸ This reformist turn has also been shaped by difficulties in retaining highly skilled labour migrants who are vital to strategic sectors of national economies, including health, technology, and manufacturing. As one labour market expert and scholar, Ahmed, in the UAE, acknowledges, "the UAE and other Gulf countries need a highly skilled workforce – local or migrants – to power their ambitious economy. These human capital losses are security concerns, because multinational companies and governments require these talents to fully operate at the optimal level".⁹ In the health sector, existing analyses acknowledge that local supply in Saudi Arabia can fall short of projected labour market demand, forcing Saudi labour migration policymakers to choose between expanding domestic supply and relaxing localisation requirements.¹⁰ Several studies have highlighted the issue of 'employee turnover' within local and multinational companies operating in the Gulf, which often triggers large-scale stepwise migration, loss of productivity, and other economic risks (e.g., recruitment, onboarding, training).¹¹ Other scholars have also suggested that localisation-linked job insecurity among skilled migrant employees has downstream effects on engagement, burn-out, and intentions to quit – dynamics directly relevant to talent retention and 'stepwise' exit decisions.¹²

Although Gulf states have attempted to develop a local supply of skilled talent through *Gulfisation* initiatives such as innovation incubators, upskilling, and women's workforce empowerment, these efforts have often achieved limited success due to structural and significant talent shortages.¹³ Because of stepwise migration pressures and the limited depth of the local skilled talent pool in these economies, Gulf states increasingly view stepwise migration of skilled migrants as a mounting domestic national security issue that threatens long-term economic diversification plans. Another labour market and migration specialist in the Gulf, John, emphasised: "The Gulf states have extremely ambitious plans, but they struggle to keep the talents, particularly in the UAE. These major reforms, like Golden Visa, signal their way of understanding outflow of skilled talent as a serious national security problem since these skilled human capital talents are critically necessary to their long-term regime interests and aspirations (i.e., economic diversification requires skilled human capital; ongoing demographic imbalance in key sectors like health)".¹⁴

This critical shift also reveals an evolving social contract between Gulf states and skilled migrants, elevating the migration issue from 'low' to 'high' politics due to its direct implications for economic efficiency, labour shortages, and business competitiveness in critical sectors such as AI, medicine, and engineering.¹⁵ The policy consequences of a 'security framing' matter are straightforward: Once a government treats a policy challenge as a security problem, it tends to be prioritised and resourced differently.

Gulf Healthcare Sector – A Case of National Security Concern?

The healthcare sector offers an important case for analysing how stepwise migration becomes a national security issue in Gulf labour markets, as workforce gaps can translate rapidly into service capacity risks and higher replacement costs, particularly in times of crisis (e.g., the COVID-19 pandemic). In this context, healthcare workforce retention is not only an institutional staffing concern but also part of the

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broader political economy of service delivery, which in the Gulf is linked to the prevailing rentier bargain between regimes and citizens and can therefore carry regime-security implications when shortages become chronic or destabilising.¹⁶

In Saudi Arabia, health workforce dependence on expatriate labour remains structural. Existing studies reveal that, in the context of Vision 2030-era health workforce capacity requirements, Saudi nationals constitute 44% of the overall health workforce and only 29.5% of physicians.¹⁷ This structural labour dependence is not only a staffing issue but also signals a national planning constraint, especially under Vision 2030's emphasis on compositional change towards a higher national share by 2030 that requires careful sequencing to avoid destabilising service delivery.¹⁸ Recent labour market modelling findings also strengthen the economic security framing by translating these dynamics into projected labour market imbalances. Using Ministry of Health yearbook data (2007–2018) and projecting through 2030, Lin et al. estimate that overall demand will reach 9.07 physicians and nurses per 1,000 population. These scholars further estimate that only about 17% of these workers would be Saudi nationals under current trajectories, leaving a large demand shortfall for Saudi nationals.¹⁹ In this context, retaining experienced, skilled migrant clinicians ultimately becomes a risk management strategy during a long training pipeline, particularly in shortage specialties.

Similarly, the UAE case also illustrates how retention tools can serve as policy signals central to both economic and national security planning. Existing studies reveal that expatriate physicians in the UAE found that the government's 10-year visa policy was a significant factor in encouraging employee retention, while income was not the dominant factor for most respondents. However, in the nursing sector, a recent survey of nurses in UAE governmental hospitals found that a substantial share reported a strong intention to leave, and further indicated that work environment and employment satisfaction often influence migrant workers' decisions to leave their workplaces.²⁰ As one hospital-based human resource manager, Marco, emphasised: 'It is difficult also to increase the nurses' wages because most often leave after two or three years, which creates a serious nursing staffing turnover not just here but for other hospitals in the country too.'²¹ This aligns with the quantitative studies of AlAwad and Malit²², and Carlos and Sato²³ on the centrality of the citizenship penalty in stepwise decisions among Filipino nurses in the UAE and with broader findings that – where critical sectors depend on long-tenured skilled migrant workforces – retention becomes a matter of institutional resiliency and economic security policy rather than a narrow migration concession.²⁴

Gulf States' Socio-Legal Reforms as National Security Strategies

Recent geopolitical crises and dynamics – including the COVID-19 pandemic and intensified regional and global competition for skilled migrants – have also contributed to a shift towards viewing stepwise migration as a national security challenge and prompted more inclusive socio-legal reforms to attract and retain skilled migrants, even amid local opposition or discontent.²⁵ Although localisation efforts continue, Gulf states remain dependent on skilled migrants to address structural labour shortages, and stepwise migration to Global North destinations exposes policymakers to vulnerabilities and risks that can encourage more centralised, securitised approaches to domestic migration management. This shift also highlights Gulf states' functional imperative to secure a supply of skilled migrants as part of long-term domestic and geopolitical economic visions, with 'talent attraction and retention' increasingly prioritised within national security frameworks due to its centrality to economic growth.

Post-pandemic stepwise migration has been associated with intensified national security concerns, and both Saudi Arabia and the UAE have pursued reforms that expand conditional citizenship and residency options, often tied to income and skills.²⁶ In the UAE, the government has additionally extended Golden

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Visa eligibility to long-serving nursing staff (with at least 15 years of service), which is publicly framed as national recognition of service and an incentive for stability in a critical sector.²⁷

Saudi Arabia has also established exceptional premium residency pathways for high-income investors, expatriates, migrants, and in some cases, citizenship pathways for highly skilled migrants viewed as human capital 'assets' central to domestic economic growth, reflecting political economy concessions and strategic adaptation to geopolitical competition for talent. Saudi Arabia's Labor Reform Initiative abolished key elements of the kafala sponsorship system in 2021 to increase internal labour mobility, expand self-sponsorship, and improve labour rights and working conditions, thereby attracting and retaining workers.²⁸ Saudi Arabia also offers a premium residency pathway for high-income earners (earning SR 30,000+, approximately USD 8,000), alongside citizenship pathways for exceptionally skilled migrants. In addition, Saudi Arabia's Ministry of Human Resources and Social Development established a new skills classification system in July 2025, with the classification applying to new hires from August 2025 as part of efforts to shift from a one-size-fits-all model to a merit-based approach (high-skilled, skilled, or basic) in line with Vision 2030 labour market goals. These holistic strategies tactically aim to attract and retain high-skilled migrant labour talent crucial to their traditional (i.e., SMEs and large-scale institutions) and giga development initiatives and serve as countermeasures to mitigate skilled human capital outflows central to long-term economic diversification and national security planning.

The complex linkages between labour migration policy reforms and localisation pressures remain critical to retention in Gulf labour markets. For instance, Saudisation is a long-standing government policy initiative to localise human capital supply and reduce structural dependence on expatriate labour, while resolving persistent skills gaps and labour market mismatches; however, uneven adoption across sectors or firms can produce uncertainty among expatriate professionals and increase the propensity for stepwise exit, especially where long-term residency and family security remain conditional.²⁹

In the UAE, policymakers have increasingly viewed mitigating stepwise migration as a political economy response. In fact, the UAE government has liberalised labour migration policies through a Golden Visa system with income thresholds (AED 30,000), flexible visa types (e.g., talent visa, green visa, digital nomad visa, freelance and remote work visas), and labour market flexibility pathways (including switching employment without employer consent).³⁰ The UAE government has also increasingly passed property ownership rights to skilled migrants in designated areas, facilitating investment and settlement among wealthy expatriates. These reforms serve as incentives to attract and retain highly skilled labour and as geopolitical tools to stabilise the supply of human capital for long-term economic diversification and planning strategies. More broadly, Gulf sponsorship regimes continue to shape (im-)mobility for skilled migrant populations. Existing studies in Qatar also nuance the stereotype of the uniformly 'hypermobile' knowledge worker by showing that skilled migrants exist on a spectrum of immobility, with sponsorship systems and origin-country security conditions shaping decisions to stay, move, or leave.³¹ In fact, even where labour mobility arrangements are more flexible (as in Saudi Arabia and the UAE), perceived stability of mobility rights can matter as much as their content in the long run.

Finally, the UAE has introduced social policies such as legalising cohabitation for unmarried individuals, strengthening anti-discrimination laws, and introducing civil marriage for citizens and migrants alike, while also tailoring urban development to accommodate the family needs of skilled migrants (i.e., access to healthcare and education). Saudi Arabia's social reforms under Vision 2030 also include key reforms beneficial for skilled migrant workers, including improvements to internal labour mobility (eliminating employer consent requirements for job changes), anti-discrimination measures, and wage protection system initiatives. These social reforms signal strategic openness and political concessions to attract and retain highly skilled labour migrants and mitigate unintended consequences of stepwise migration that

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can undermine long-term economic growth objectives; in this sense, sweeping socio-legal reforms reflect national security concerns about the outflow (or shortage) of highly skilled talent and its negative consequences for labour shortages in strategically important sectors.³²

Conclusion

This policy report examined the stepwise migration of skilled migrants as a national security concern in the Gulf, with comparative national security and healthcare sectoral focus on Saudi Arabia and the UAE. Rather than being framed as a domestic migration management concern, stepwise migration has increasingly been securitised within the Gulf states' migration management policies, contributing to a strategic shift from traditional laissez-faire approaches towards more reformist socio-legal frameworks. These critical developments reveal linkages and risks among migration management, economic diversification, and national security, as Gulf states seek to protect their ambitious socio-economic visions and long-term domestic and geopolitical interests by tactically stabilising the supply of skilled human capital through migrant flows.

Policy Recommendations

A durable, comprehensive response to stepwise migration pressures requires targeted multilevel policy interventions that explicitly link national security and migration governance to the sectoral drivers of workforce planning and retention highlighted in the evidence above. Three policy recommendations have been developed to directly address key national security governance gaps in stepwise migration, including better shortage diagnostics in priority sectors, stronger training pipelines aligned with labour market projections, and more credible retention tools that use conditional residency and citizenship penalties to de-incentivise stepwise exit.

First, the UAE and Saudi Arabia need to consider establishing specialised government units to identify critical high-skilled labour shortages in priority sectors. This recommendation follows on sector-specific vulnerabilities (particularly in healthcare) and the need to translate projected labour market supply imbalances and turnover risks into actionable retention and recruitment priorities.

Second, regional forums such as the Abu Dhabi Dialogue should introduce 'skilled migration' as a thematic agenda to promote ethical recruitment pipelines.³³ This also addresses the intensification of global competition for skilled migrants and the need for coordinated approaches that can stabilise inflows while managing retention and mobility pressures across the region.

Lastly, Gulf states should shorten long-term residency pathways for skilled migrants (e.g., reducing the duration from 10 to 5 years) to enhance retention of critical human capital. This recommendation follows from the abovementioned central finding that conditional and tiered residency/citizenship pathways – and associated citizenship penalties – can reinforce decisions to leave, especially in critical sectors (such as healthcare) where long tenures underpin institutional resiliency and where stepwise exit can quickly become an economic security risk

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