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Highly Skilled Migration to the Gulf States



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Foreword

The Gulf Cooperation Council (GCC) countries—Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates—have become central actors in the global migration landscape. In 2019, these six nations hosted 11 percent of the world's total migrant population, positioning the region as a major hub for international mobility. The GCC-Asia migration corridor stands as the largest South-South migration route, with the Gulf states serving as the primary destination for workers from Asia, the Mashreq, North Africa, and Sub-Saharan Africa.

Historically, migration to the Gulf was dominated by low-skilled labour, particularly in private and domestic service sectors. However, the region is undergoing a profound transformation. Driven by the need to diversify and decarbonise their economies, GCC governments have set ambitious goals to foster knowledge-based and innovative industries. Central to these efforts is the attraction and retention of skilled and highly skilled workers, who are essential for building internationally competitive economies.

To realise these objectives, Gulf states have introduced significant policy reforms. Initiatives such as Saudi Arabia's Labour Market Initiative and Premium Residency Card, the UAE's Golden Visa, and amendments to citizenship laws are designed to enhance the region's appeal to global talent. These measures offer improved social protection, career prospects, and pathways to long-term residence or even naturalisation. As a result, the Gulf is now increasingly competitive with leading economies in attracting highly skilled professionals, and its influence—both economic and diplomatic—is expanding rapidly.

Understanding the dynamics of the Gulf labour markets, their interaction with other global talent hubs, and the motivations of highly skilled migrants is crucial for policymakers and stakeholders. Insights into these trends help assess the challenges and opportunities in attracting global talent. This will enhance economic development in the Gulf region and increase its international influence.

This book offers a comprehensive view of highly skilled migration to the Gulf, drawing perspectives from both the receiving states and the countries of origin in Asia and Africa. It explores the policies, trends, and experiences that define this phenomenon, providing valuable analysis for specialists in migration, labour, and international relations, as well as policymakers in the Gulf, origin countries, and other major destination regions.

Special thanks to those who helped bring this book to fruition, including Dr. Nasra Shah, Dr. Françoise De Bel-Air, Mr. Imco Brouwer, and Ms. Christine Williams of the Gulf Research Center as well as Mr. Philipp Dienstbier, Ms. Marah Jamous, and Ms. Layan Ounis of the Konrad Adenauer Foundation.

Dr. Abdulaziz Sager
Founder and Chairman, Gulf Research Center (GRC)

Foreword

The GCC countries have long been a key destination for global migration flows, particularly from the Global South in the form of low-skilled labour. However, with ambitious reform agendas and a drive to transform consumer economies into knowledge-based hubs, they have increasingly sought to attract highly skilled workers. Today, the Gulf hosts around 11 percent of the world's migrants, and remittance streams from the region impact countries of origin on an unprecedented scale.

As GCC economies diversify in preparation for a post-oil and gas era, the structure of their labour markets is undergoing profound changes with considerable consequences for migration. In states such as Saudi Arabia and the United Arab Emirates, efforts to integrate citizens into the private sector have intensified, creating pressure on foreign labour. At the same time, the emergence of entirely new industries, tourism, automaking, and digital services, has sparked fresh demand for international human capital—albeit with a different skill set than that of previous labour migrants to the Gulf.

Against this backdrop, highly-skilled migration to the Gulf has gained importance. This trend mirrors broader global dynamics: Europe, and especially Germany, is experiencing demographic change that has sharply increased the demand for skilled labour. In Germany alone, more than 40 percent of enterprises report difficulties in filling specialist vacancies, a challenge echoed in other European economies.

As the global competition for talent intensifies, migration streams linking Europe and the Gulf are becoming increasingly complex and nuanced. The studies presented in this volume examine these developments from both the perspectives of sending and receiving countries, offering an in-depth analysis of the current state of highly skilled migration in the GCC and providing a valuable basis for understanding the region's role in the global race for talent. They also illuminate the policy frameworks that increasingly shape the attraction, governance and retention of highly skilled workers across the Gulf.

Developed in partnership with the Gulf Research Center (GRC) and the Konrad-Adenauer-Stiftung (KAS), this volume seeks to contribute to the evolving regional dialogue on highly skilled migration and the labour market policies that shape it. It is my hope that the chapters in this volume will not only provide deeper insights into these dynamics but also contribute meaningfully to ongoing debates on migration and the global competition for talent.

Philipp Dienstbier
Director of the Regional Programme Gulf States, Konrad-Adenauer-Stiftung (KAS)

About the Institutions

Gulf Research Center

The Gulf Research Center (GRC) was founded in July 2000 by Saudi businessman Dr. Abdulaziz Sager. Dr. Sager's vision was to fill an important void and to conduct scholarly, high-quality research on all aspects of the wider strategic Gulf region including the GCC countries as well as Iran, Iraq, and Yemen. GRC operates on an independent, non-profit basis. The GRC's belief is that everyone has the right to access knowledge. As a result, it has made all its research available to the public through publications, workshops, seminars, and conferences. As a non-profit organisation GRC injects all income back into new programmes and activities.

Gulf Labour Markets, Migration, and Population Programme

The Gulf Labour Markets, Migration, and Population (GLMM) Programme is an international independent, non-partisan, non-profit programme hosted and supported by the Gulf Research Center. The programme provides data, analyses, and recommendations contributing to the improvement of understanding and management of Gulf labour migration, population, and labour markets, engaging with and respecting the viewpoints of all stakeholders.

Konrad-Adenauer-Stiftung (KAS)

The Konrad-Adenauer-Stiftung (KAS) is a non-profit German political foundation affiliated with Germany's largest political party, the Christian Democratic Union (CDU). With over 100 offices in more than 120 countries and more than 200 programmes worldwide, KAS promotes international dialogue, democratic governance, the rule of law, and sustainable socio-economic development. Through its global network of partners across government, civil society, academia, and the private sector. KAS supports informed decision-making, fosters constructive exchange, and contributes to deeper mutual understanding in an increasingly interconnected world.

KAS Regional Programme Gulf States (RPG)

Established in 2009, the KAS Regional Programme Gulf States focuses on strengthening political, economic, and cultural cooperation between Germany, Europe, and the countries of the Gulf Cooperation Council (GCC). Its work centres on enhancing mutual understanding, supporting economic modernisation and private-sector development, fostering regional and collective security dialogue, and empowering youth and civil society. As a think-tank and consultancy platform, the programme facilitates bilateral and multilateral exchange and contributes to informed policymaking while addressing the diverse contexts and needs of the Gulf region.

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Introduction

Setting the Stage: Migration and Transformation in the Gulf

The Gulf Cooperation Council (GCC) countries—Saudi Arabia, the United Arab Emirates (UAE), Qatar, Kuwait, Bahrain, and Oman—have long been recognised as pivotal destinations in global migration systems. With nearly half of their combined populations composed of foreign residents, the Gulf has become the third-largest migration hub worldwide, after North America and the European Union. Historically, scholarship and policy debates have focused overwhelmingly on low-skilled migration to the region, particularly the flows of South Asian nationals employed in construction, domestic work, and service sectors. These workers have been central to the Gulf's rapid urbanisation and infrastructural development, but their experiences have also raised pressing questions about labour rights, sponsorship systems, and social integration.

Yet the past decade has witnessed a profound shift. Driven by ambitious national visions—Saudi Vision 2030, Qatar National Vision 2030, UAE Vision 2031—the Gulf states are seeking to diversify their economies, reduce dependence on hydrocarbons, and position themselves as global centres of innovation, finance, and knowledge production. In this context, the attraction and retention of highly skilled migrants have become a strategic priority. Engineers, doctors, scientists, managers, academics, and entrepreneurs are now viewed not merely as supplementary labour but as essential partners in building knowledge-based economies. The GCC's ability to compete for talent will shape its economic future and determine whether its reform projects succeed.

This volume, *Highly Skilled Migration to the Gulf States: How do GCC Countries Fare in the Global Competition for Talent?*, responds to this shift. Originating from a 2024 project conceived by the Gulf Labour Markets, Migration, and Population (GLMM) Programme of the Gulf Research Center (GRC) and implemented with the support of the Konrad Adenauer Stiftung's Regional Programme Gulf States (KAS-RPG), this project convenes prominent academics to analyse the policies, practices, and impacts associated with highly skilled migration in Saudi Arabia, Qatar, and the UAE. By situating the GCC within the global competition for talent, the volume highlights both the opportunities and challenges facing the region. Seeking to challenge the common assumption that migration to the Gulf region is essentially driven by Gulf states' labour demand, the volume also foregrounds the perspectives of sending countries, whose professionals constitute a vital share of the Gulf's skilled workforce. In doing so, the volume contributes to a more holistic understanding of migration dynamics, moving beyond economics and the traditional focus on lowskilled labour to interrogate the complex interplay of skill, nationality, gender, and sociopolitical policy frameworks.

Part I: A View from Receiving Gulf States

The first part of the volume examines the policy landscapes of Qatar and the UAE, two states that have positioned themselves as leaders in attracting global talent.

Qatar: Reform, Vision, and Selectivity: In their chapter, **Ameena Almeer, Misba Bhatti, and Zahra Babar** provide a nuanced account of Qatar's evolving labour migration regime. They interrogate whether recent reforms—such as changes to the sponsorship system and new residency pathways—are genuinely "skills blind" or selectively targeted toward specific categories of migrants. The chapter situates these reforms within Qatar's broader national vision, which seeks to build a diversified

economy anchored in education, research, and innovation. Yet the authors highlight persistent challenges: retention remains limited, with many highly skilled migrants viewing Qatar as a temporary stopover; nationality hierarchies continue to privilege Western expatriates over Asian professionals; and gender disparities constrain women's opportunities despite rising participation in healthcare and education. The chapter underscores the tension between ambitious national visions and the realities of segmented labour markets.

UAE: From Laissez-Faire to Centralised Governance: Froilan Malit traces the UAE's shift from a laissez-faire approach to a more centralised governance model. The introduction of the Golden Visa and other long-term residency schemes represents a significant departure from the traditional reliance on short-term contracts. Malit assesses the successes and limitations of these initiatives, particularly in the post-COVID era. While the UAE has succeeded in attracting global talent to sectors such as finance, technology, and healthcare, retention remains a challenge. Many expatriates continue to view the UAE as a temporary destination, and structural inequalities persist across nationality and sectoral lines. The chapter highlights the delicate balance between openness and control, as the UAE seeks to attract talent while maintaining its distinctive labour market model.

Together, these chapters reveal the GCC's dual strategy: ambitious reforms aimed at attracting highly skilled migrants, coupled with persistent reliance on segmented labour markets that privilege nationals and certain expatriate groups. They underscore the need for evidence-based policies that move beyond shortterm attraction to longterm retention and integration.

Part II: A view from Migrants' Countries of Origin

The second part of the volume turns to the sending countries—Tunisia, Egypt, Pakistan, India, and the Philippines—whose professionals and graduates constitute a vital share of the Gulf's highly skilled workforce. These chapters highlight how origin-country policies, demographic pressures, and educational systems intersect with Gulf labour demands, producing diverse trajectories of skilled mobility.

Tunisia: Feminisation and Bilateral Frameworks: Ali Belhaj analyses Tunisian migration flows, emphasising the feminisation of skilled mobility. Tunisian women, particularly in healthcare and education, are increasingly migrating to the Gulf, reshaping traditional gender dynamics. Yet the chapter highlights the need for stronger bilateral frameworks to protect migrants and ensure mutual benefits. Tunisia's experience underscores the importance of origincountry policies in shaping migration outcomes.

Egypt: Surplus of Educated Professionals: Dina Abdel Fattah examines Egypt's surplus of educated professionals among the drivers of highly skilled migration from Egypt to the GCC. Egypt fails to retain its educated workforce, driven away by low wages, high unemployment, and skill mismatches. Egypt is thus a key source of talent in healthcare, education, and engineering, attracted by GCC's higher wages and tax-free systems. The chapter calls for bilateral agreements on social protection, benefits portability, and gender sensitivity, envisioning a "triple win" for workers, Egypt, and GCC economies. It situates Egyptian migration within broader debates about education, unemployment, and regional labour markets.

Pakistan: Opportunities and Structural Challenges: Nasra Shah and Memoona Qazi provide a detailed account of Pakistan's highly skilled outflows. They highlight both opportunities—such as remittances and professional development—and structural challenges, including limited upskilling and weak institutional frameworks. The chapter underscores the need for comprehensive policies that align education with Gulf and overseas labour market demands.

India: Paradigm Shift in Migration: Binod Khadria positions India as a major origin country of highly skilled migrants. Its central thrust is to propose innovative policy recommendations by examining both supply and demand dynamics of skilled migration. India's large pool of educated graduates, particularly in STEM fields, positions it as a key supplier of talent to the Gulf. Highlighting entrepreneurs, professionals, and students in narratives on the UAE, Saudi Arabia, and Qatar, the author uncovers country-specific occupational profiles. After stressing the lack of systematic data, the chapter uses Indian higher education and employment trends as proxies for supply-side analysis and examines Global North immigration systems (points and preference models) shaping migrant pathways, on the demand side. The chapter then evaluates occupational classifications (ILO-ISCO-08 and alternatives) and concludes with innovative policy recommendations

Philippines: Skilled Migration within a Low-Skilled Framework: Jorge Tigno and Geoffrey Ducanes focus on the Philippines, where highly skilled migration to the Gulf is growing but increasingly as a first step before relocating to a Western country offering higher wages and permanent settlement opportunities. Highly skilled migration from the Philippines to the Gulf also remains overshadowed by policy frameworks centred on low-skilled overseas Filipino workers. The chapter highlights the need for more nuanced policies that recognise the contributions of skilled professionals and address issues of social protection and career development.

Together, these chapters reveal the diversity of sending-country experiences. They highlight how demographic pressures, educational systems, and policy frameworks shape migration flows, and how perceptions of the Gulf influence migrants' decisions. They also underscore the importance of bilateral cooperation in ensuring mutually beneficial outcomes.

By bringing together case studies from both sides of the migration corridor, this volume contributes to a more holistic understanding of highly skilled migration to the Gulf. It underscores the need for evidencebased, inclusive, and forward-looking policies that recognise the aspirations of migrants, the developmental needs of sending countries, and the strategic ambitions of Gulf states. It situates the GCC not only as a regional migration hub but also as a key player in the global competition for talent—one whose future will depend on its ability to reconcile economic diversification with equitable and sustainable migration governance.

In sum, this volume situates the GCC at a critical juncture. The future of highly skilled migration to the Gulf will depend on the region's ability to balance nationalisation with openness, shortterm project demands with longterm settlement incentives, and economic diversification with social integration. The stakes are high—not only for the Gulf but also for the global competition for talent.

A

A View from Receiving Gulf States

1

Qatar's Policy Landscape and its Impact on Highly Skilled Migration

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Abstract

This research report explores Qatar's labour migration policies and their impact on highly skilled migrants to the country. Despite a unified labour law, practical differences exist in how various migrant tiers are integrated into the labour market. The kafala system significantly constrains low-skilled workers, while highly skilled migrants reportedly enjoy greater mobility. However, nationality and gender complicate this narrative, with Western expatriates allegedly receiving better compensation than their Asian counterparts, and gender-specific restrictions affecting skilled women's opportunities. The study aims to provide a nuanced understanding of Qatar's highly skilled migration regulation, exploring the intersections of skill level, nationality, and gender within the country's evolving labour market dynamics. Since 2017, Qatar has implemented significant labour migration reforms aligned with Qatar Vision 2030 to attract a skilled workforce for its diversifying economy. The chapter examines the motivations and implications of these reforms, investigating whether Qatar's policies are truly "skills blind" or if selective measures target highly skilled workers. It also addresses the impact of "Qatarisation" policies on highly skilled migrants. The authors analyse recruitment processes, employment practices, and policies affecting highly skilled migrants to understand Qatar's strategies for attracting and retaining top talent. The study employs a mixed-methods approach, combining desk research with qualitative interviews to gather empirical data and enhance understanding of these dynamics and their implications for highly skilled migrants in Qatar.

Introduction

This study examines Qatar's labour migration policies and their impact on highly skilled migrants, a subset of the migrant population that has received limited attention in Gulf Cooperation Council (GCC) migration research. The paper provides a nuanced understanding of Qatar's regulation of highly skilled migration, exploring the complex interplay between skill level and the country's evolving labour market dynamics across six key nationalities. Qatar's ambition to transform into a knowledge-based economy and attract highly skilled talent long-term is examined in the context of key push and pull factors, including financial gain, family settlement, and regional competitors. Employing a mixed-methods approach (desk research and semi-structured interviews) the authors analysed recruitment processes, employment practices, and policies affecting highly skilled migrants. The findings provide an understanding of Qatar's successes and existing policy gaps in attracting and retaining talent, complemented by policy considerations on strengthening the country's evolving economic landscape.

Definitions

Highly skilled migrants are most commonly classified based on educational attainment. Many Global North countries use education level as a criterion for granting visas to highly skilled migrants. UNESCO's International Standard Classification of Education (ISCED) provides a standarised framework for categorising educational levels globally (International Labour Organization 2021).

Typically, a tertiary degree (bachelor's degree or higher) is required to classify migrants as highly skilled, with the exact educational threshold varying globally:

- United States: Generally, requires at least a bachelor's degree for H-1B visas
- Canada: Uses a points-based system that awards points for various levels of education
- European Union: Often requires a higher education qualification of at least 3 years

Many countries also consider specific skills and work experience when defining highly skilled migrants (World Bank, 2015). The International Standard Classification of Occupations (ISCO), developed by the International Labour Organization (ILO), provides a framework for categorising occupations based on skill level (ILO 2021). Key aspects of skills-based classification include: minimum years of experience in a specialised field; technical skills, often in high-demand sectors like IT or engineering; and qualifications from recognised institutions in certain industries.

From an academic lens, scholars and policymakers use income level or salary to identify highly skilled migrants, assuming that higher wages correlate with higher skill levels and economic value. Countries may set minimum salary thresholds for highly skilled visa categories (Schmidtke 2015; Weinar and Von Koppenfels 2020).

While there are common themes in defining highly skilled migrants, significant variations exist between countries. Qatar's classification system categorises migrants based on their skill levels and job functions. According to the Planning and Statistics Authority, *Labour Force Sample Survey 2020 Statistical Analysis*, highly skilled migrants encompass the three upper categories in the ILO-ISCO-08 classification of professions: legislators, senior officials and managers, professionals; technicians and associate professionals; this is equivalent to categories 3 and 4 of the classification of skill categories in ILO/ISCO 1988 and 2008. Skilled migrants include clerks, service workers, vendors, and agricultural and fishery workers. The limited skill category comprises craft and related trade workers, as well as machine operators. This classification system differs from many Western countries in that it focuses on job functions rather than educational attainment or visa eligibility (Planning and Statistics Authority 2020). The authors will use this categorisation to define highly skilled migrants in this paper.

Literature Review and Relevance

The current literature focuses overwhelmingly on low-income migrants in blue collar jobs, namely male migrants from South Asian countries in construction work. While some work focuses on the specific experiences of certain demographics, such as Indian or Egyptian white-collar migrants in Qatar, these studies focus on single nationalities rather than a broad overview of non-Western highly skilled migrants. This gap is especially noticeable regarding Pakistani and Filipino highly skilled migrants, who have traditionally held low-income jobs but have increasingly occupied white-collar positions, yet remain largely under-examined. The lack of empirical research may arise from the challenge of distinguishing the small yet growing segments of these nationalities employed as highly skilled migrants from their long-established and larger low-skilled counterparts. Given that previous studies have examined the gradual shift of Arab migrants in the 1960s and 70s towards highly skilled professions, it is plausible that as technological changes and local labour laws advance further, currently under-examined groups of South and Southeast Asian white-collar employees may follow a similar trend and that their numbers may grow in size to provide vital skills to the economy. This niche is of particular interest as the GCC grows to be a global migration hub, hosting 11–15% of all migrants worldwide (De Bel-Air 2022; Johns Hopkins and International Organization on Migration 2023).

Additionally, this research contributes to the growing literature on the efficacy of retention policies towards highly skilled migrants. Multiple scholars have examined the various motivations of highly skilled migrants entering Qatar and have challenged traditional assumptions regarding the relative mobility of high-income migrants remaining under *kafala* sponsorship (Babar, Ewers, Khattab, 2019). Others have also examined the process of identity construction by long-term migrants who retain aspects of their own culture while assimilating in Qatar. However, many current studies have focused on highly skilled migrants seeking accelerated financial and career goals before re-settling in their country of origin, or on second-and-third-generation migrants continuing to live in the Gulf despite being excluded from formal integration and access to citizenship. While the exclusion felt by Arab migrants is well-documented (Osaid and Khattab, 2023; El Berni 2018; Soudy, 2016), there is less literature on how a long-standing affinity to Qatar, coupled with limited legal prospects for long-term settlement, has impacted South and Southeast Asian migrants. Given recent state-led initiatives to attract and retain highly skilled migrants of all nationalities, including increased visa opportunities and various education and job opportunities for international students, it is worth examining whether expanding pathways for mid- to long-term settlement could encourage individuals to settle permanently. This study reframes the place of migrants in Qatar as more than a career stepping stone and as a sentiment existing strongly outside of only Arab migrant communities, as their affinity for and recognition of benefits to staying are increasingly clear.

Finally, the literature does not fully examine the impact of artificial intelligence (AI) on specific job functions, particularly in knowledge based-sectors such as higher-education, or AI's impact on talent attraction and retention. AI has become widely used for various highly skilled professional functions, including recruitment, supplementing employee's competencies, and use of generative AI to enhance work quality. This study contributes to the expanding literature with an Arab country case study, examining how Qatar can compete regionally by regulating AI in strategic sectors, and providing key insights from interviews on pressing policy gaps to ensure its ethical use in highly skilled professions.

Methodology

Note on sources

At the time of this study, there were no published statistics from the Qatari government detailing foreign residents by nationality or percentages of nationalities by profession. Numbers provided below are from sending country news outlets and government offices, individual press statements and government official statements made by Qatari or sending government representatives and estimates from published research or policy centres.

References to legislation and policy on labour issues are cited from primary sources as far as possible. Some information on policy and legislation changes are not confirmed by government entities or published through *Al Meezan,* the Qatari Ministry of Justice's legal portal. This information is instead extrapolated according to observed changes in practice, citing locally-based law firms, consultancies, and other reputable entities specialising in global immigration law and international labour law.

As the literature on highly skilled migration in the Gulf continues to develop, we have cited case studies of highly skilled migration to Qatar or the GCC. In areas such as AI regulation in highly skilled professions or other areas where the literature is underdeveloped, desk research is supplemented with surveys as described below.

Selection of participants

A qualitative approach was employed, utilising target sampling to select 11 participants for interviews. Participants were chosen based on experience with organisations operating in Qatar, including research and policy centres, UN Doha offices, law firms, embassies, and consulting firms.

While not all participants had extensive answers to each question, individuals were selected for their expertise in specific sections, and/or because they represented one of the 6 key sending countries. Given the limited sample size, this method of sampling was most effective for targeting individuals with concentrated knowledge of Qatar's policies towards highly skilled migrants. Participants were contacted directly by the authors using a standardised template detailing the broad objective of the study, the investigator's names and institutional affiliations.

Survey administration

Surveys were administered in-person or via video call through a semi-structured conversation format, inviting open answers. Investigators conducted interviews with scripted questions as conversational prompts to guide the discussion and identify important points for elaboration. A generic version of the script, adapted as needed by the authors prior to interviews and in-conversation, was divided into four sections: 1) general portrait of Qatar's highly skilled migrants, 2) technology and economic development, 3) efficacy of retention policies, and 4) intra-Gulf mobility and circular migration.

All surveys were voice recorded and uploaded onto a private drive. Prior to starting recordings, participants read a consent form and were given a copy for their records, which included the study's title, procedures, use of information, types of questions to be asked, and authors' contact details.

Qatar's National Vision 2030 and Strategies for Labour Market Development

Qatar National Vision 2030 (QNV 2030), initiated in October 2008, is a comprehensive development framework for transforming Qatar into a sustainable, economically advanced society by 2030. It is based on four interconnected pillars: human, social, economic, and environmental development.

The economic development pillar prioritises economic efficiency, utilising natural resources responsibly, and cultivating a knowledge-based economy. By diversifying the economy, reducing reliance on hydrocarbons, and transitioning the labour market from low-skilled to highly skilled migrants (General Secretariat for Development Planning 2008), Qatar's goal is for 46% of the country's total workforce to be engaged in skilled occupations by 2030 (Planning and Statistics Authority 2024).

To achieve QNV2030, Qatar is focusing on several key strategies:

1. **Investing in education and supporting research and development**: Increasing investment in education and research to develop a highly skilled workforce, and increasing R&D funding and partnerships with global institutions to drive innovation.

2. **Attracting skilled migrants and encouraging knowledge transfer to Qatari employees**: Implementing policies to attract global talent (including streamlined visa processes and competitive salaries), and facilitating skill transfer between migrants and locals to drive nationalisation.

3. **Economic diversification through non-hydrocarbon sectors and entrepreneurship**: Establishing incubators and innovation hubs to foster an entrepreneurship culture, and diversify sectors including finance, IT, healthcare, education, and sports.

4. **Enhancing digital infrastructure**: Investing in digital technologies and smart city initiatives to support knowledge-intensive industries.

Through these strategies, Qatar aims to instead focus on tertiary and high-value services. Due to the small size of the country's population of 2.7 million (General Secretariat for Development Planning 2008), the influx of highly skilled migrants plays a vital role by providing skills, expertise, and global connections in sectors still developing locally, and in supplementing the local workforce's small numbers.

A Portrait of Highly Skilled Migrants in Qatar

An Overview of Migrants in Qatar

Low-skilled migrants significantly outnumber highly skilled migrants to Qatar, at an estimated 50% and 20% respectively as of 2020. The typical low-skilled migrant is a 31-year-old single male in construction with a high-school education, whose remittances primarily support his parents (Ganesh 2012). Specific nationalities are often relegated to low-skilled jobs based on stereotypes, leading to racialised hierarchies and wage discrimination between Arab and non-Arab migrants (Babar and Vora 2022). Health and occupational hazards faced by construction workers, such as heat stroke, wage theft, and unethical recruitment, garnered significant attention ahead of the 2022 FIFA World Cup (FWC).

The portrait presented of highly skilled migrants in the subsequent section stands in sharp contrast. Labour issues and concerns repeatedly raised by highly skilled migrants in interviews were largely distinct from those of low-skilled migrants. While low-skilled migrants frequently face labour abuses and restrictions under the *kafala* system, the previous literature has pointed to highly skilled migrants also enduring job mobility constraints dictated by their employers. Additionally, anecdotal evidence from interviewees showed some overlap between high-and-low-skilled migrants' labour rights abuses, including arbitrary enforcement of non-compete clauses by employers to impede job changes, discrimination between Arabs and non-Arabs, and employers filing absconding cases. This research fills gaps in understanding the economic and social well-being of highly skilled migrants, questioning the assumption that their rights are ensured through better labour mobility and bargaining power.

To some extent, broader legislative reforms leading to the 2022 FWC positively impacted low and highly skilled migrants, such as Laws 18 and 19 of 2020, which increase the on-paper job mobility of all migrants to change jobs, a concern repeatedly mentioned during interviews. However, the highly publicised and welcomed law No. 17 of 2020 setting the minimum wage was directly targeted at low-skilled migrants and, by nature of average work sector and salary range, did not have an impact on highly skilled migrants. Similarly, Ministerial Decision 16 of 2007, that restricts working hours for outdoor jobs during summer months from 10 a.m. and 3:30 p.m, where employees are subjected to hot weather conditions, solar radiation, humidity, and heat, applies exclusively to low-skilled migrants such as security and construction migrants whose work is outdoors, rather than mostly office-based highly skilled migrants.

Numbers and Characteristics of Highly Skilled Migrants to Qatar

In total, migrants make up 88% of Qatar's population (GLMM 2020), and 95% of the workforce. Age distribution of foreign residents in Qatar is overwhelmingly clustered into the 15–64 years age group (about 90%), while only roughly 10% are school-aged from 0–14 years (GLMM 2017).

Since the early 2000s, the profile of migrants in Qatar has shifted significantly. While a 47% segment of non-nationals are still construction sector employees (Planning and Statistics Authority 2021), there is now a significant subset of highly skilled migrants who comprise an estimated 20% of the population as of 2020 (Planning and Statistics Authority 2021). Current sending countries targeted for the focus of this paper, can be narrowed to two categories: the wider MENA region (Tunisia, Egypt, Jordan), and Southeast Asia (India, Philippines, Pakistan).

Highly skilled migrants are typically presumed to be nationals from a mix of Western and Arab countries, with the latter only making up an estimated 3% of the Qatari population in 2019 (Ewers et al. 2021). Highly skilled migrants are concentrated in professions including medicine, law, executive or managerial positions, university faculty, and

engineering (Ewers et al. 2021). Housing distribution of highly skilled migrants suggests they are also employed in multiple mega-projects crucial to Qatar's long-term infrastructure and economic development, including Msheireb, Lusail City, Education City, and Hamad International Airport (Ibrahim et al. 2019).

Gender and marital status

While male migrants significantly outnumber female migrants in Qatar, there has been a notable increase in highly skilled migrant women, along with a rise in wives of men in highly skilled professions settling long-term. Female migrants exhibit relatively diverse employment patterns, with 31% in "white-collar" jobs compared to only 13% of men. Many highly skilled migrant women, as of 2015, are in strategically valuable sectors like retail and education, each accounting for about 11% of their employment (De Bel-Air 2017).

In 2017, the country's total migrants were primarily single at 81%, with the minority married at 19% (Ibrahim et al. 2019). However, these statistics do not provide a gender-specific breakdown of marital status, potentially obscuring the contributions of migrant women. Many women work under family sponsorship as "housewives" without holding work visas. While this allows easier access to the labour market, it negatively affects their financial benefits and salary structures.

Male migrants can sponsor their wives for family visas based on a QAR10,000 ($2,750) minimum income for government and semi-government employees, and QAR10,000 for private sector employees or QAR6,000 ($1,650) for private sector employees with a housing allowance, while female migrants cannot sponsor their husbands (Khattab et al. 2020). Additionally, research indicates a gender earnings gap among female migrants in the GCC, highlighting a double disadvantage due to both gender and migration status (Alfarhan and Al-Busaidi 2020). Despite 86.8% of highly skilled migrant women holding bachelor's degrees compared to 83.7% of local men, they still experience lower pay and fewer sponsorship options (Alfarhan and Al-Busaidi 2020). These capped career prospects arguably harm highly skilled women's long-term propensity to remain in Qatar based on the same entry factors (examined below) which incentivise highly skilled male migrants to work in the country.

Education level

Of all non-Qataris aged 15 and above, 23% hold an undergraduate degree, 13% hold a master's, and 0.5% hold a PhD (GLMM 2023). International students also comprise a significant and growing category of highly skilled migrants, with non-Qataris making up 44% of total student enrolments across universities in Qatar in 2019, including branch campuses of overseas universities (Umar and Rahman 2023). At Hamad Bin Khalifa University and Qatar University, non-Qataris account for 70% and 38% respectively of the student population (Umar and Rahman 2023). Overall, the non-Qatari student population has grown significantly, more than doubling from 7,154 to 15,392 between 2012 and 2021 (Umar and Rahman 2023).

Most non-Qatari students (60%) are from fellow Asian countries and fellow Arab states (excluding Egypt), followed by South Asian states (GLMM 2023). In coming years, these students may experience an increased likelihood of settling long-term in Qatar after graduation if there are increased retention policies conducted in tandem between higher education sectors and government entities (see section 3).

Migrants from Target Countries

There were 20,000 Tunisians in Qatar as of 2016, having increased incrementally over the years. Of 5,926 living in Qatar in 2009, 2,142 were women (Babar 2014). A 2012 micro-study of 15 Tunisian women revealed that their primary motivations for moving to the Gulf were to earn larger salaries within a limited amount of time and they typically did not intend to stay for longer than a five-year period (Babar 2014).

The Jordanian population in Doha is 75,000, almost doubling since 2016 (Jordan Times 2024). Jordanian remittances from Qatar totalled $475 million in 2023 (Jordan Times 2023), marking a 10% increase from 2022; the remittance growth and Qatar's emphasis on employing young Jordanians suggests that a large portion of migrants are highly skilled and high-income. Qatar ensured the recruitment of 10,000 Jordanians leading up to 2022 FWC (Jordan Times 2023), fulfilling half a pledge made in 2018 to recruit 20,000 total Jordanian youth alongside a $500 million investment from Qatar in Jordan (Oweis 2021). Additionally, there have been multiple meetings between the Qatari and Jordanian ministries of labour to facilitate manpower agreements (Amman News 2022). This growth indicates a migrant demographic who are motivated partly by concentrated, short-term financial goals and career acceleration tied to hosting the FWC but are also keen to re-settle long term after the economic boost the event has provided Qatar with.

Egyptian residents in Qatar (both high and low-skilled migrants) comprise a significant percentage of the total

population, roughly doubling from 2009 to 2017 when the Saudi-led diplomatic boycott of Qatar began. There were an estimated 140,000–160,000 in 2013 (Soudy 2016), 200,000 in 2016 (De Bel-Air 2017), and 350,000 in 2017 (Ismail 2017). An estimated 25% of the Egyptian population in Qatar were high-income migrants as of 2013 (Soudy 2016). Despite a lack of exact numbers, the ongoing increase of Egyptian nationals in Qatar persists despite political tumult between the GCC states arguably indicating the persistent willingness of Egyptians to settle long-term.

Despite the political impact of the diplomatic boycott from 2017–21[1], this did not negatively impact existing Egyptian migrants' renewal of work and residence permits, including for their dependents (Fragomen LLP 2019). However, the subsequent closing of the Egyptian embassy in Doha had an adverse effect on the labour mobility of migrants, stunting new growth of the Egyptian labour force, with a particular impact on female Egyptian nationals already residing in Qatar and their ability to penetrate the Qatari labour market. The following categories of applicants were subject to suspensions or significant delays, with no clear timeline:

- Sponsorship transfers between employers
- New labour card issuances and renewals for female Egyptian residents sponsored by their husband or father
- Restriction of new entry visas for Egyptians

In January 2021, Egypt and Qatar re-established diplomatic ties and the Egyptian embassy in Qatar reopened in June of that year (Ismail 2017).

Several studies have been conducted on the sense of belonging experienced by Egyptian nationals settled in the country. In a comparative study of the US and Qatar, 11 highly skilled, high-income Egyptians in Qatar revealed various sentiments indicating that, despite having settled long-term and considering Qatar as home, they felt a degree of social stratification of nationals and non-nationals, despite being amongst the largest populations of foreign nationals in the country (Soudy, 2016). Similar findings are also made in Osaid and Khattab's recent work, which concludes from a survey of 11 tertiary-educated individuals that second-generation non-Gulf Arab migrants settled under long-term family settlement experience a sense of "place-belonging." This cultural and personal affinity persists despite exclusionary citizenship and settlement laws in countries including Qatar which perceive foreigners as temporary (Osaid and Khattab, 2023). These results on both second-generation Egyptian and non-Egyptian Arab migrants emphasise a crucial propensity towards long-term settlement by Arab migrants. Results also suggest that the affinity towards remaining in Qatar increases with education, skill, and income level.

There were 125,000 Pakistanis in Qatar as of 2016 (De Bel-Air 2017) and 300,000 currently (Kilani 2024), primarily men employed in construction and hospitality (Kilani 2024). Pakistanis continue to migrate to Qatar in significant numbers, with approximately 58,000 new people arriving in 2023. The Pakistani diaspora in Qatar sent home $1 billion in 2023 (Mallick 2024). Letters of intent for future manpower agreements with Qatar and government officials have stated that Pakistan aspires to secure jobs in the energy and healthcare sectors for its nationals in Qatar (Mallick 2024), indicating a potential but slow shift towards highly skilled jobs without further indication yet on which specific professions will be targeted.

There were 650,000 Indians in Qatar as of 2016 (De Bel-Air 2017), and 836,794 as of the latest estimate (Indian Ministry of External Affairs 2024), with both numbers making them the largest nationality of the country's population at 25–28%.

Information on the Filipino community in Qatar is sparse through desk-based research; there are roughly 260,000 including high and low-skilled migrants (De Bel-Air 2017). Ongoing meetings between the Filipino government and Qatari Ministry of Labour indicate forthcoming manpower agreements targeting skilled Filipino migrants including nurses, architects, and engineers, showing potential growth for this category (Sadongdong 2024).

Interviews emphasised the steep population hike and World Cup buildup of mega-projects as prime time for attracting highly skilled migrants seeking accelerated financial and career development. Conversely, interviews revealed that considerably fewer Western highly skilled migrants remained after the FWC, and that all nationalities who did so found less lucrative job benefits. Additionally, interviewees highlighted that the launch of numerous large-scale infrastructure projects in Saudi Arabia is attracting a significant number of highly skilled migrants from Qatar. The willingness of specific demographics and potential for circular migration to regional competitors is discussed further in section 4.

Technological Changes Affecting Highly Skilled Migrants: AI Use and Regulation in Highly Skilled Workplaces

The Ministry of Labour launched its job portal, *Ouqul,* in August 2024. The portal combines technology from Google Cloud and local firm Mannai InfoTech to tailor job suggestions and AI-enhanced resumes for graduates of local universities. This presents a vital step towards the use of AI systems catered to local needs.

Throughout interviews, participants regularly stated that individual employees' AI use in highly skilled professions was ubiquitous despite a lack of policies regulating acceptable use. This policy gap was particularly concerning for professionals in higher education and research who stated that generative AI use was not adequately defined to prevent plagiarism. As a matter of priority for remaining regionally competitive and curating a knowledge-based economy, Qatar must address the increasing use of common AI software including ChatGPT, Grammarly, and Google AI to determine its parameters in desk and highly skilled jobs. While there have been limited Qatari organisations such as Qatar Foundation which have explored the potential for AI tools to replace humans, interviewees confidently asserted that AI was able to augment human capabilities but is currently far from replacing them. Multiple interviewees cited cultural and religious awareness as crucial challenges for AI tools' use in Qatar, alongside limited datasets for AI and capped capacity to answer questions in highly specified sectors or ones with stringent privacy regulations.

Recruitment and Retention Policies

Pull Factors for Highly Skilled Migrants

Like the UAE and Saudi Arabia, Qatar does not levy an income tax and boasts comparably higher incomes than those which highly skilled migrants would earn in their origin countries (Babar et al. 2018). In a study analysing the mobility of various demographics of highly skilled migrants in Qatar, Babar, Ewers, and Khattab found through their analysis of determinants of migrants' attraction to the country that "income and earning potential" and "lack of taxation" were among the three consistently highest factor across Arab, Western, South Asian, and East Asian migrants (Babar et al. 2018).

Particularly for highly skilled migrants from Arab countries including Jordan and Tunisia, migrating to Qatar affords the cultural and religious closeness associated with being in a Muslim, Arab country. Interviews indicated broadly that Qatar offered a cultural and religious middle ground between Saudi Arabia and the UAE, with the former offering a more traditionally conservative lifestyle and the latter offering too few aspects of Islam in daily life to be suitable for long-term settlement or raising children. This is particularly valuable to migrants who relocate long-term or with their families. Interviews emphasised that alongside bouts of regional, economic, and political instability in other Arab countries, Qatar's comparative safety offers a regional migration hub sheltered from many of these issues. Babar et al. found that highly skilled migrants from Arab countries ranked "local security and stability" higher than counterparts from Western, East Asian, and South Asian demographics (Babar et al. 2018).

Lastly, in order to ensure that more than 46% of the total workforce is skilled or highly skilled by 2030, Qatar has plans to enable new ways of working, which would further facilitate employee mobility. A recent policy announced by the Qatari government, in September 2024, allows public sector employees to have flexible working hours and up to 30% of staff to work remotely for one week per year. The flexible work schedule consists of seven hours each day, running from 7 AM to 2 PM. Employees have the flexibility to check in between 6:30 AM and 8:30 AM without impacting their work obligations, as long as they fulfil their required working hours. Mothers with children under the age of 12 will have the option of one month of remote work annually. According to the National Development Strategy 2024–2030, similar policies will also be implemented in the private sector to attract more highly skilled international talent to Qatar's labour market.

Qatar's Retention Policies Towards Highly Skilled Migrants

Higher education

To help international students graduating from local universities transition into highly skilled migrants, several policies have recently been implemented by Qatari universities to retain homegrown talent. Hamad Bin Khalifa University (HBKU), founded in 2010 under Qatar Foundation, offers a loan forgiveness scheme to foreign nationals graduating

from American branch campuses in Qatar Foundation's (QF) Education City. While HBKU is a home-grown university, it exists under an umbrella campus alongside American branch campuses, and QF has used the advanced expertise of foreign institutions to feed into HBKU. By working for an approved entity, including a number of governmental and semi-governmental organisations, HBKU financial aid recipients can absolve their student loans through paid service (HBKU, n. d.). Furthermore, Qatar University (QU) has partnered with the Ministry of Labour to provide students with training units tailored to finding jobs in the local labour market (Qatar University, 2024). Qatar has a significant advantage in this regard as it hosts the 4th largest number of branch campuses globally, with the UAE coming 1st (Hanada 2013). These policies appear to apply to all foreign nationals regardless of birth country and family settlement status, with no distinctions made on university websites and financial aid documents.

The Ministry of Labour's newly-launched *Oqoul* portal fills precisely this niche, as a designated platform for streamlining the recruitment of non-national university graduates in a bid to retain home-grown talent. By matching graduates with private sector jobs based on their skill profiles, the platform brings together local universities, private sector entities, and expatriate university graduates to facilitate their employment (Ministry of Labour). Qatar's educational infrastructure has experienced significant and positive growth, surpassing other competitors in the GCC, in part thanks to its significant investment in tertiary education (3.2% of its GDP in 2020) and financial and scholarship incentives for non-Qatari students seeking a world-class education close to home (Umar and Rahman 2023). As Qatar seeks to bolster the domestic capabilities of its local universities, including Hamad Bin Khalifa University, the Doha Institute for Graduate Studies, and the newly established University of Doha for Science and Technology, it is crucial to consider the role that international students will play in populating, diversifying, and building momentum in these institutions.

Visas and businesses

Visa Centres and Programmes

Qatar has established 20 Visa Centres to create a unified visa system that expedites the recruitment process and protects the rights of migrants by eliminating exploitative practices in their home countries. These visa centres were established in high labour-sending countries namely India, Sri Lanka, Indonesia, Nepal, Bangladesh, Pakistan, Philippines, Jordan and Tunisia. This was a joint initiative between the Ministry of Interior, the Ministry of Administrative Development, Labour and Social Affairs, the Ministry of Foreign Affairs and the Ministry of Public Health (Government Communications Office).

In February 2024, the Qatari government announced a new five-year residence permit programme called the Mustaqel Visa designed to attract eligible highly skilled individuals and entrepreneurs to the country. The programme is initiated by Qatar Manpower Solutions Co. (Jusour) and represents a significant step in Qatar's efforts to diversify its economy and attract highly skilled individuals from around the world, aligning with QNV 2030's aim to transform the country into a knowledge-based economy. To apply, there is a QAR5,000 ($1,370) administrative cost and QAR4,000 ($1,098) fee for the 'Entrepreneur' and 'Talent' visas respectively. While it is known that endorsement from a relevant government authority is required for the talent strand, other key details have yet to be released, including its acceptance rate and if it is a sponsor-free settlement pathway. For those applying from within Qatar, a no-objection certificate and copy of ID from current employers is required (Fragomen 2024).

The Mustaqel Visa offers two distinct pathways: one for talented professionals and another for entrepreneurs, each catering to specific sectors crucial for Qatar's economic development (Qatar Manpower Solutions Co. 2024).

Talent Visa: Attracting Skilled Professionals

The Talent Visa pathway of the Mustaqel programme targets professionals across numerous sectors, reflecting Qatar's wide-net approach to economic diversification. Focus sectors include:

- Arts, Entertainment, Sports, and Cultural Talents
- Information and Communication
- Accommodation and Food Services
- Agriculture, Fishing, Mining and Stone Extraction
- Wholesale and Retail Trade
- Transportation and Storage
- Financial Services, Insurance, Management and Support Services

- Education, Scientific Research, Development, and Innovation
- Human Health and Social Services

Applicants must either have a job offer from an entity within Qatar or demonstrate financial means equivalent to QAR36,500 ($10,000) for a three-month period, ensuring financial stability or workforce integration.

Entrepreneur Visa: Fostering Innovation and Business Growth

The Entrepreneur Visa is designed to attract innovative business minds to Qatar. Eligibility requires approval from a recognised Qatari business incubator with a minimum project value of QAR250,000, ensuring business model viability and growth potential (Qatar Manpower Solutions Co. 2024).

The approved business incubators include:

- Qatar Science and Technology Park (QSTP)
- Qatar University Business Incubation (QUBI)
- Qatar Business Incubation Centre (QBIC)
- Digital Incubation Centre (DIC)
- Qatar Fintech Hub (QFH)
- Media City
- Qatar Museum - M7

These incubators cover a range of industries, from technology and finance to media and culture, aligning with Qatar's vision for a diverse, innovation-driven economy.

Sahem Programme

Qatar Manpower Solutions Company (Jusour) has also introduced the Sahem programme that offers two pathways for Qatar-based university students and graduates to find employment as well as stay back in the country after graduation (Sharek 2023). The Student Part-time Work Program helps students gain work experience while pursuing their education (Jusour 2024). The Sahem Graduating Student Visa Extension Program supports recent graduates of Qatari universities by offering a one-year visa extension while they search for employment. Candidates can apply for the visa extension through the Jusour platform, with extensions issued directly by the Ministry of Interior (Jusour 2024). Both services under the Sahem programme are designed to support expatriate students in Qatar, providing them with opportunities to gain work experience and transition into the job market after graduation. There is not yet a clear policy on the Sahem and Jusour webpages on whether they intersect with the paid service schemes for HBKU graduates (section 2a) and no publicly available information was found on the approved list of organisations to fulfil tuition repayment through paid service.

The attraction of migrants to Qatar is influenced significantly by the straightforwardness and transparency of hiring processes. Qatar has signed 36 bilateral agreements and 13 memorandums of understanding with migrants' countries of origin, cementing key legal protections into the recruitment and employment process. Agreements and visa centres in sending countries allow migrants to streamline their job search and provide tangible requirements, lessening concerns raised before the 2022 FIFA World Cup regarding unregulated or unethical recruitment practices, such as exorbitant recruitment fees illegally charged by unaffiliated agencies.

Additionally, while pathways to citizenship are intentionally limited through *jus sanguinis*, Qatar has introduced long-term settlement schemes which emphasise highly skilled migrants' socio-economic integration as a means to long-term or permanent residency. The Golden Visa Scheme, also known as the Investor Visa, allows migrants to achieve Temporary (1 year) or Permanent (5 year) Residency Permits through real estate investments of either QAR 728,000 ($19,900) or QAR 3.65 million ($1 million) respectively (Bayat Group 2024).

Finally, Qatar has reformed its laws regulating launching new businesses to revitalise the country's startup ecosystem. In 2022, the Ministry of Commerce and Industry exempted small to medium enterprises (SMEs) from tender document fees and reduced performance guarantees (Al Naimi 2024). These changes positively lower entry barriers and streamline the government procurement process and foster the creation of new SMEs, by reducing bureaucratic difficulties, reducing the costs of creating new businesses, and facilitating the entry of new competitors into the market. While businesses must still register their entity with a 51% Qatari national shareholder (Squire Patton Boggs 2018), minimising institutional inertia is a crucial step to building the country's economic momentum and encouraging ease of economic integration, through less cumbersome joint business ventures between Qatari primary

shareholders and enthusiastic migrant business partners. This 2022 law bolsters existing free zones in Qatar under Qatar Financial Centre and Qatar Science and Technology Park, the former of which subjects business owners to a 10% corporate tax and the latter of which is limited to technological and scientific enterprises (Squire Patton Boggs 2015). Increased entrepreneurship avenues are essential for increasing Qatar's competitiveness within the region, as interviewees repeatedly cited ease of opening businesses as a main pull factor for highly skilled migrants choosing Dubai over Doha.

Indicators of Retention

Current research indicates that the likelihood of long-term settlement by highly skilled migrants in Qatar correlates with an increase in female expatriates whose primary occupation is "homemaker," the majority of whom are Arab (De Bel-Air 2017). De Bel-Air (2017) demonstrate that of Arab migrants in Qatar, half are family dependents of migrants and argues that the high number of familial dependents among Arab migrants is an indicator of Arabs' relative concentration in highly skilled professions (due to the family dependent visa's minimum income and housing eligibility requirements). Given the rising numbers of highly skilled migrants with children born in Qatar, and the increase of migrants settling long-term with their families, the authors of this paper argue that a willingness to move with family to Doha indicates medium-to-long term settlement prospects.

A key pull factor repeatedly emphasised in interviews was the comprehensive healthcare insurance provided to the highly skilled migrants by the employer especially as it relates to families. Multiple participants noted that the strong healthcare system and current system of subsidised public healthcare was highly attractive, while simultaneously noting Law No. 2021/22 Regulating Healthcare Services Within the Country which would require migrants to secure private healthcare insurance. Before the law came into effect in May 2022, non-Qataris could avail the services of the nationalised Hamad Healthcare Corporation by paying QAR100 ($28) for a health card (Migrant-Rights, 2022). Although a draft law has been approved, further details including an implementation timeline are yet to be announced, including costs of health insurance premiums and provisions of government subsidies as payment to certain categories of non-Qataris (Saretsky, 2023). The interview data also outlined that the provision of comprehensive healthcare services provided to the highly skilled migrants and their family was seen as an incentive to stay in the country long-term.

Additionally, in 2022 the government allowed children of expatriates working in the private sector to register in government schools in nine areas (The Peninsula 2022). This suggests a tangible expansion of Arab migrant families, as the language of instruction in government schools is Arabic and private schools were not fully able to meet enrolment demands. In 2023, the Ministry of Education further announced that children of all nationalities could apply to transfer to government schools, with no notable restrictions on specific areas (Ministry of Education and Higher Education 2023).

Other schooling trends which may indicate long-term retention of highly skilled migrants includes the establishment of schools following designated national curricula including Indian (I Love Qatar Staff 2024), Pakistani (Imtiaz 2024), and Filipino schools (Marivie 2024). The opening of international schools attracts highly skilled migrants who move with their family by choosing destinations which ensure continuity of their children's education, over countries without similar social services. Interview results reinforced this as participants cited schooling prospects and a family-friendly lifestyle, safety, and security as key pull factors for highly skilled migrants in Qatar, in turn increasing potential for familial dependents raised in the country to continue studying and working in the local job market. This was reinforced during interviews, as participants noted the presence of schools for specific nationalities, such as Indian, Lebanese, Pakistani, and other international schools, which sustain large communities of students and are at times over-enrolled, notably for Indian schools.

Highly Skilled Migrant Retention and Gulf Regional Pull Factors

Participants resoundingly mentioned Qatar, Saudi Arabia, and the UAE as being the three regional economies in tight competition for retaining highly skilled labour, noting that Kuwait, Oman, and Bahrain did not offer comparable financial opportunities or economic growth prospects.

Qatar targets several labour-sending countries for its workforce, notably Arab states and countries from South Asia, Southeast Asia, and Africa, through its diplomatic, political, and economic strategies. Opening migration and relationship channels involves cultivating relationships through

labour export policies, improving employment conditions, and engaging in public diplomacy efficiently, particularly through events such as the 2022 FWC. Economic strategies usually employed to grow bilateral migration corridors include manpower agreements, opening government offices in sending countries to create transparent and streamlined recruitment processes (World Bank 2013), investing in sending countries' economic development, as done in 2021 when Qatar pledged to invest $500 million in Jordan (Oweis 2021), and ensuring sending countries' diplomatic presence in Qatar, catering to sizeable migrant populations from these countries.

Exit Factors and Circular Migration of Highly Skilled Migrants

Highly skilled migrants in Qatar express concerns about exit factors including "job security," "income and earning potential," and "local stability and security." A study by Babar, Ewers, and Khattab (2019) which analysed 324 surveys alongside 32 interviews, found that despite these concerns, most respondents (89%) and particularly 97% of Arab respondents indicated no immediate intention to leave for at least another year (Babar et al. 2018). This literature was further supported by interview findings from Arab highly skilled migrants, who agreed that they or others in their extended social circle initially moved to Qatar for a set period of time before repeatedly extending their stay and settling long-term. Both Arab and non-Arab interviewees stated the general willingness of highly skilled migrants to remain in Qatar despite anxieties caused by employment-contingent settlement, repeatedly stating that the lack of long-term settlement pathways compared to the UAE were a push factor for highly skilled migrants who would otherwise prefer to stay in Qatar.

Arab highly skilled migrants showed greater resilience to exit factors and were less likely to leave compared to Western and Asian counterparts. These migrants prioritise security and community ties over financial gain, influenced by their inability to return to their home countries due to stability issues, namely for Jordanian and Palestinian migrants. Although this could be due to the feared consequences of political instability issues including population displacement from the West Bank and Gaza, this relationship was not explicitly covered by the study or mentioned by participants. Furthermore, our participant pool is not large enough to get nuance about exact factors of Arab country regional instability. Thus, this link is speculative and warrants further study.

The sentiment that Qatar provided a politically and economically stable environment compared to sending countries was reinforced in interviews with participants from Egypt and Tunisia, who cited their country's lack of political and economic stability as retaining factor to stay in Qatar. Thus, safety is a significant factor for raising families in Qatar, encouraging long-term settlement.

A crucial exit factor repeatedly raised in interviews was the prospect of Qatarisation, through which specific job positions are reserved for nationals. Some interviewees expressed uncertainty about the extent to which their profession will be nationalised or if such positions will impact their employment prospects. With the recent employment nationalisation law, private sector entities are required to prioritise Qatari nationals and non-citizen children of Qatari mothers over foreign nationality applicants (Fragomen, 2024). This aligns with Qatar's vision for a knowledge-based economy with an educated and highly skilled local population and presents a crucial first step towards this.

However, interviews reinforced a sense of professional and social stratification salient between employees, making apparent that future legislation towards successful workforce nationalisation must emphasise skill-sharing, and transparent timelines on the rate of nationalisation procedures which offer greater security. While Qatari employees are far fewer in number than migrants, Qatarisation pushes an additional burden onto organisations because Qatari employees have higher salaries and are more expensive to employ. Interviewees occasionally mentioned that Qatarisation unnerved high-skill migrants, causing them to self-restrict their career trajectory and potential earnings, rather than pushing for higher salaries and imposing themselves as more costly employees to retain. Interviews demonstrated that high-skill migrants are aware of perceived notions in Qatar as a host country that they are comparatively accounted for less in human resources and workforce planning, which becomes a long-term exit factor by way of reduced transparency and salient feelings of uncertainty.

Competition Between Gulf States in Retaining Highly Skilled Migrants and Migrants' Intra-Gulf Mobility

Interviews resoundingly emphasised the sentiment that Qatar, KSA, and the UAE (specifically Dubai and Abu Dhabi over other emirates) were three Gulf states in direct competition for retaining highly skilled migrants because of their economic growth and ambitions, with Kuwait, Oman, and

Bahrain not comparing in wealth or development goals. Additionally, multiple interviews drew explicit comparisons between Dubai and Doha as both being wealthy cosmopolitan settings, with the former catering to an individualistic lifestyle and the latter being suitable for raising families.

Multiple comparisons were also made between Doha and Dubai due to the latter's greater number of visa choices and ease of opening businesses, reportedly making it more attractive to young entrepreneurial migrants. With regards to specific professions or skills-based migration, most participants noted the trend of mega-projects and infrastructural development as a major pull factor to other Gulf countries, most notably KSA due to its ongoing projects Neom and The Mukaab. Desk research found notable comparisons within the hydrocarbon industry between Saudi Aramco versus Qatar Petroleum, and in the aviation industry with Riyadh Air versus Qatar Airways. Although not all job titles and grades correspond directly, anecdotal evidence provided online by employees suggests that Riyadh Air offers a wider salary range than Qatar Airways for comparable positions, warranting further analysis on the competitiveness of adjacent entities in key sectors in the Gulf region, its relationship to domestic living costs, and how this may drive circular migration.

Conclusion

Qatar has introduced some key policies which increase its regional competitiveness as a long-term hub for highly skilled migrants, but remains behind its frequently-cited main competitor, the UAE (with Dubai and Abu Dhabi named explicitly over other emirates). Qatar's ability to retain talent will rely on the success of its new visa programmes and situating the country as a family-friendly destination adjacent to Dubai's increasingly cosmopolitan lifestyle.

Furthermore, Qatar will benefit greatly in multiple key industries which contribute to the knowledge-based economy, including regulating consulting, higher education, IT, and government and semi-government services by setting concrete policies regulating the use of AI in workplaces. This is particularly pressing for generative AI, which interviewees emphasised continues to require human input due to current datasets' inability to calculate cultural and local sensibilities, and the increasing rate it at which it is used in daily life.

Finally, Qatar will retain more highly skilled migrants by increasing transparency in various application processes for visas and job applications, as the above desk research emphasises crucial points of application processes and job-seeking initiatives which are not yet widely publicised. Interviewees repeatedly cited transparency and accessibility of information as an administrative and time constraint on planning long-term settlement, drawing direct comparisons to ease of accessing information about settling in the UAE.

Suggestions for future research and policy trends are primarily linked to finding information on South and Southeast Asian highly skilled migrants in Qatar. Information on the Filipino community is difficult to find through desk research and fieldwork, making them an underrepresented demographic here. The increasing shift of Indian, Pakistani, and Filipino migrants from low-to-highly skilled occupations warrants analysis, as the impact of existing retention policies on highly skilled Arab migrants is comparatively well-documented, although not completed by any means.

Finally, the results represented here are limited in their applicability due to the targeted sampling method. While this method afforded greater accuracy for a short-term study and afforded valuable insights from professionals highly knowledgeable on specific areas of migration law, policy, and practice, future studies should adopt a long-term approach and increase the sample size significantly. One recommended approach is to combine targeted sampling of professionals similar to those identified for this study with semi-structured interviews, combined with a large, randomised sample of participants from target countries answering a standardised short-answer survey.

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Endnotes

1 In 2017 Saudi Arabia, the United Arab Emirates, Bahrain and Egypt cut diplomatic and trade ties with Qatar and imposed a sea, land and air blockade on Qatar, claiming Qatar's close relations with Iran, alleged support for political Islamic movements, such as the Muslim Brotherhood, and the hosting of Al Jazeera Network as the main causes of the rift. The blockade ended in January 2021.

2

From *Laissez Faire* to a Centralised State Approach?

A Critical Policy Analysis of the UAE's Attraction and Retention Approach Towards High-Skilled Migration in the Post-COVID-19 Era

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Abstract

How do host states attract and retain highly skilled migration in the Gulf Cooperation Council (GCC) countries? Despite recent regional and global polycrises, the GCC states have maintained a strong 'global migration hub,' hosting at least 28 million migrants in the Global South. As part of their modernisation efforts, GCC countries have also implemented domestic socio-legal policies to attract and retain highly skilled migrants, offering incentives to prolong their long-term settlement pathways. Using the case of the United Arab Emirates (UAE), this report offers three-fold arguments: firstly, the UAE has transformed its approach to highly skilled migration from a *laissez-faire* to a centralised state governance model, thereby enhancing its long-term competitiveness in the global labour market. Secondly, despite the UAE's success in attracting highly skilled migrants, retention issues persist, which ultimately leads to the transit of highly skilled migrants to the Global North (mainly Europe and North America). Thirdly, although the growing centralisation approach has further institutionalised over time, highly skilled migrants in the UAE have continued to face a series of various labour market constraints, thus forcing them to develop differential coping strategies in the host country. Methodologically, I employ a mix of semi-structured interviews with stakeholders and highly skilled migrants from Egypt, India, and the Philippines, while utilising secondary sources from existing government policy documents and private sector/think tank migration reports. Overall, the study attempts to provide the first post-COVID-19 pandemic mapping and analysis of the UAE's centralised strategies for attracting and retaining highly skilled migrants and their consequences in the UAE labour market.

Introduction

For more than half a century, the GCC has increasingly become the largest regional host of migration globally, historically shaped by Arab, Asian, and, more recently, African migration, generating more than USD 130 billion annual outflow of remittances (Ratha et al., 2022). Despite various regional and global polycrisis (i. e., 2008 financial crisis, 2017 GCC crisis, COVID-19 pandemic), the GCC states have increasingly sustained their competitive labour markets, attracting and exploiting diverse classes and skills of temporary migrant workers from various global migration corridors (Lori, 2019; Ratha et al., 2022). Nearly 11% of global migrants reside and work within the GCC region, strategically positioning the GCC states as a central migration node in the global economy. These GCC states function as a vital source of economic assets (i. e., remittances, investments, and trades) for various sending states, temporary migrants, and their families, particularly during financial crisis periods (Wickramasekara, 2016). The GCC states have consistently maintained robust economic growth, projected to increase from 2.8% in 2024 to 4.7% in 2025, thereby enhancing their regional and global potential to generate more employment opportunities in both the short and long term (World Bank, 2019). With massive GCC economic investments, they are also projected to produce more economic productivity and expand existing 'promising national sectors' including the digital economy, artificial intelligence, research and development, information technology, communication services, logistical services and tourism, and financial technology (UAE Ministry of Economy, 2024). Specifically, current public estimates in the field of digital technology indicate that the GCC has the potential to generate at least 600,000 tech jobs, which could potentially contribute $255 billion to their national GDPs by 2030 (see Maceda, 2022). As a result, these advanced strategic industries are expected to attract more highly skilled migrants globally but also to exacerbate the ongoing 'talent shortage' in the GCC private sector over the next few years.

However, despite such GCC socioeconomic transformations, recent scholarly and policy literatures have yet to examine the historical and contemporary responses of GCC states to governing highly skilled migration, specifically in a post-COVID-19 pandemic scenario. Much of the existing GCC migration scholarship has extensively analysed the plight of low-skilled migrants in the GCC sectors, including domestic work, construction (Wells, 2018; Fargues et al., 2019), domestic work/care work (Kagan, 2017), hospitality (Fargues et al., 2019), and other service-related industries. They specifically highlighted the GCC states' kafala sponsorship system's role in everyday exploitation of low-income migrant workers (Jureidini, 2016). In contrast, while an emerging literature has increasingly focused on the role of Gulf states in managing highly skilled migration to the GCC (Khadri, 2018; Bortolazzi and Khan, 2023; De-Bel Air, 2017; Hvidt, 2019), they have yet to analyse the recent critical junctures (i. e., introduction of UAE's Golden Visa and other similar GCC programmes for highly skilled migrant populations) across the GCC, specifically the UAE, linked to the post-COVID pandemic

context's attraction and retention strategies for highly skilled migrants. Overall, the study offers a critical policy analysis of the UAE's centralised approach toward governing highly skilled migration and its domestic and geopolitical consequences.

This research policy report analyses the GCC states' growing centralisation strategies in governing high-skilled migration over the past decade (2014—present), with a specific focus on the post-COVID-19 pandemic scenario. Using a single case study of the UAE, I offer three-fold arguments: firstly, the UAE's approach to high-skilled migration has evolved from laissez-faire to a highly centralised state-coordinated apparatus, thereby elevating the UAE's long-term competitiveness in the regional and global labour market. Secondly, despite the UAE's success in attracting highly skilled migrants through domestic legal reforms such as Golden Visas, retention issues persist, leading to high-skilled migrants transiting to Europe and North America. Thirdly, despite the growing centralisation approach, highly skilled migrants in the UAE have continued to face a series of various labour market constraints, thus forcing them to develop differential coping strategies. These critical arguments highlight the interplay between the domestic-geopolitical approaches of the UAE toward governing highly skilled migration and their implications for achieving long-term economic competitiveness and visions.

This policy report is mainly structured into the following sections: firstly, I broadly examine the historical laissez-faire approach (pre-2014) of the UAE in governing highly skilled migration dynamics. Secondly, I explain my research methodology, including semi-structured interviews with key informants and highly skilled migrants, desk report analysis, and field observations in the UAE private sector. Thirdly, I analyse the UAE's centralised approach to governing highly skilled migrant populations, successfully achieving higher attraction than retention rates in the private sector. Fourthly, I unpack the diverse outcomes of this centralised governance on highly skilled migrant populations, highlighting highly skilled coping strategies and alternative pathways both in the UAE and beyond. The concluding section explores the future of the UAE's centralising approach to highly skilled migration policies, as well as the domestic and geopolitical impacts that it will have on the GCC region and beyond.

Early 'Laissez Faire' Approach of UAE Towards High-Skilled Migration

Since the early 2000s, the UAE has strategically set ambitious economic vision plans to diversify from their hydrocarbon economies, with various local emirates establishing their industry targets.[1] Mainly governed by the country's private sector actors, Dubai aims to become a 'global hub' for tourism, business, and finance, while Abu Dhabi focuses on building a knowledge-based economy with strategic investments in development, education, and healthcare. Sharjah aims to preserve its cultural heritage by investing in building a regional centre for Islamic culture and economy through the development of mosques, museums, and educational institutions. Other local emirates like Ajman, Fujairah, Ras AlKhaimah, and Umm Al Quwain similarly focus on developing their hospitality, tourism, and real estate sectors. By differentially investing in sustainable economic sectors and beyond, the UAE aimed to counter economic volatility and uncertainty due to potential global economic shocks or crises (Callen et al., 2014; Hassen, 2022) while simultaneously fostering economic growth, development, and competitiveness. However, without sufficient human capital requirements—via the integration of highly skilled migrants—the UAE discovered that such regional and global ambitions would not be achievable. This long-term strategic realisation has not only shifted the UAE's existing "laissez faire" model but also compelled them to centralise their highly skilled migration governance approach, introducing legal, social, and economic reforms to attract and retain highly skilled migrants. Thus, UAE states' increasing strategic priority for high-skilled migrants reflects the growing geopolitical, economic, and social dynamics shaping the GCC ambitions and beyond.

For many decades, the UAE successfully attracted diverse highly skilled migrant workforces from over 200 countries and territories, despite the absence of a formal highly skilled migration governance approach. Most of the highly skilled migrants in the UAE private sector largely came from diverse backgrounds in Europe, North America, Arab, and some South Asian backgrounds, occupying various positions in the fields of oil and gas, education, management, among others, following their independence in 1971. With both historical (i. e., colonial linkages) and contemporary factors (i. e., geographic proximity to the UAE, rise of aviation interconnectivity, bilateral trade relations between the GCC and other sending states), the UAE private sector was also marked by a highly racialised labour market system, largely privileging Western over non-Western populations. Thiollet

(2016: 4) acknowledges that 'the selection of migrants also corresponded to skill-based hierarchies: professional, technical, and managerial expatriates were 'imported' from Britain or America, while skilled and semi-skilled artisans and clerical workers were recruited primarily from the Indian subcontinent.' Western 'expatriate' populations, primarily from the United Kingdom, US, and Europe, hold a significant number of executive positions (Errichiello, 2023). Since colonial periods (AlNuaimi, 2022; Jamal, 2015; Errichiello, 2023; De Bel-Air, 2018), the UAE and other GCC-wide states' laissez faire strategies have consistently influenced their decades-long approach towards high-skilled migration until the early 2010s. For example, high-skilled Western expatriates tended to receive relatively higher wages than those originating from non-Western countries of origin despite performing similar occupational functions in the labour market (AlNuaimi, 2022; De-Bel Air, 2022). As Callen et al. (2014:24) highlighted a decade ago,

> *'The [UAE] and other GCC immigration system do little to attract high-skilled, high-productivity workers. In today's global economy, high-skilled workers are internationally mobile, and countries compete to attract them. The GCC framework of employer sponsorship does little to distinguish between high- and low-skilled workers and provides employers with limited flexibility to attract top talent'.*

Additionally, until recently the UAE did not establish any legal pathways for local naturalisation, citizenship, or permanent settlement (see Lori, 2019), which historically provided minimal or no incentives for individuals to remain and work permanently in the country. In other words, because of its absent pro-high-skilled migration policies, the UAE simply became a transit or gateway for highly skilled migrants seeking to capitalise via short-term employment contracts for retirement purposes or for further migration towards the West and other global destination countries.

For many decades, the *kafala* sponsorship system bounded Western, Asian, and Arab high-skilled migrant populations, largely restricting their internal labour mobility within the GCC. Babar et. al. (2019) acknowledged that:

> *'For Asian and Western migrants, immobility is attributed to the* Kafala *system or employer sponsorship, which hinders occupational and spatial mobility and ties workers to their sponsors. Arab highly skilled migrants are especially affected by lack of security and stability in their home countries, which makes these workers involuntarily immobile. The former group seem to be willing to accept a reduced level of agency and mobility for high income, whereas for the latter security and stability are more fundamental to their decision to come to Qatar.'*

Although they were highly skilled in terms of qualifications (i. e., possessing an undergraduate degree or more), they also tended to face structural UAE labour market discrimination (i. e., wage inequalities), thus impacting their socioeconomic mobility trajectories in the host country (Malit, 2024). For example, despite their similar highly skilled positions across various diverse sectors in the UAE labour markets, the existing literature indicated the labour market discrimination (i. e., in terms of pay) and other issues (i. e., deskilling) faced by highly skilled migrant populations due to their nationality type, which is directly linked to their compensation in the labour market (Malit and Oliver, 2018). Despite such existing labour market discrimination and fewer economic incentives to stay, many highly skilled migrant populations in the UAE have not only opted to settle in the UAE but also, in some cases, viewed the UAE (specifically Dubai) as a 'transit lounge' and 'second home' inevitably becoming a central actor in the everyday functioning of mainstream UAE sectors (Errichiello and Nyhagen, 2021; Rahman, 2020).

However, despite such 'low incentives,' many diverse classes of highly skilled migrants continued to move to the UAE due to various economic (i. e., relatively higher wages, no income tax, fewer labour admission requirements), geographic (i. e., proximity to families, geographic accessibility, affordability, etc.), and structural factors (i. e., increasing immigration restrictions in the West). Other scholars have also featured the growing modern cosmopolitan features—as 'cultural sites' of the UAE (AlMutawa, 2021—as critical factors for attracting highly skilled migrants (see Assaf and Pages-El Karoui, 2021; Errichiello and Nyhagen, 2021). They specifically tended to view the UAE as a 'transit', 'gateway', or 'stepwise' route towards the West (Europe, North America, etc.) and beyond (Khalaf et al., 2014; Malit, 2024). In other words, the UAE's temporary migration system for highly skilled migrants has evolved into a strategic advantage rather than a disadvantage, as these migrants leverage the migration infrastructures of their departing host countries, such as work experiences, wages, and networks, to achieve long-term mobility in other geographic regions.

A growing body of scholarly and policy scholarship has increasingly featured the growing presence of middle-class, high-skilled professionals among non-Western high-skilled migrant populations, primarily from Asia (India, Philippines, Pakistan), Arab, and, more recently, African migrant backgrounds (see AlMutawa, 2024; Errichiello and Lynahagan, 2021). While the UAE labour market is deeply shaped by

social inequality, wage-related discrimination, and sectoral-based segmentation, these non-Western high-skilled migrant populations continue to multigenerationally move to the UAE as a preferred host destination country due to its perceived 'openness' and 'high domestic security and safety (i. e., safest city, less crime)' status vis-à-vis other GCC countries (see Nasrallah, 2021).[2]

As the UAE increasingly engaged with and modernised their domestic socio-economic systems both at the regional and global levels, the UAE's laissez-faire strategies toward high-skilled migration gradually evolved, realising the potential strategic roles of skilled human capital in achieving their decarbonisation and diversification strategies (Khadri, 2018). In fact, the UAE has launched multiple vision plans at the national (Vision 2030, 'We the UAE 2031', UAE Centennial Plan 2071 and local levels (Abu Dhabi Economic Vision 2030; Dubai's Vision 2030), strategically emphasising modern economic, infrastructural, and diplomatic transformations (see Narayanan, 2022; UAE Government, 2024). More specifically, the UAE has strategically recognised the influential role of highly skilled human capital in achieving their long-term economic vision plans towards building a knowledge-based economy. While the UAE did not specifically initiate any institutional reforms to integrate highly skilled migrant populations, they at least symbolically recognised them as vital development partners in shaping their future economic agendas in various domestic, regional, and global state-related publications on migrations.[3] These pre-COVID-19 pandemic approaches by the UAE reflect their gradual yet increasing efforts to integrate high-skilled migration into their economic vision plans, utilising a variety of economic, institutional, and social mechanisms (refer to the following section for further details). In other words, the UAE's symbolic recognition of highly skilled migrant populations within their long-term economic visions mirrored their long-term strategic ambitions to decarbonise and develop sustainable economic growth for their domestic economies.

Methodology

To examine the contemporary highly skilled migration governance of the UAE, I employed semi-structured interviews with key stakeholders (state officials, high-skilled migrants, recruitment industry actors, and UAE migration experts), desk review analysis, and field observations between August and November 2024. I selected the UAE as a single case study for the following reasons: firstly, the UAE has consistently experienced the highest economic growth over the past decade due to its massive domestic economic and infrastructural investments (i. e., mega infrastructure events like the Dubai Expo). Secondly, the UAE has also consistently hosted the highest share of migrant populations—including highly skilled migrants—and transformed into the most preferred host state for global talents. Thirdly, in contrast to other GCC countries, the UAE has increasingly adopted pro high-skilled migration policies, given its highly ambitious regional and global vision plans and competitions from other host regions. It firstly introduced strategic long-term settlement initiatives (i. e., the UAE's Golden Visa) to attract, retain, and recruit high-skilled migration.

In terms of data collection, I collected semi-structured interviews (N = 30) from state officials and high-skilled migrants from India, the Philippines, and Egypt living in the UAE, migration experts, and recruitment agencies. These highly skilled migrants, both first- and second-generation, are legally living and working in highly skilled positions (management, professionals) in the UAE private sector. They also do not hold any second Western-based nationality, and their ages range from 32 to 57 years old, with an average of 15 years of immigration stay in the UAE. Key stakeholder interview questions focused on their demographic and employment backgrounds, as well as their labour and migration perceptions toward the UAE's centralised, highly skilled migration approaches. Additional questions were also raised related to their everyday experiences, views, and coping mechanisms across various UAE private sectors' strategies pertaining to attraction, recruitment, and retention strategies. In addition, the report also employed desk review analysis of existing government, academic, policy, and newspaper publications pertaining to the UAE policy strategies towards high-skilled migration agendas. These secondary materials helped enrich the analysis of GCC states' strategies toward high-skilled migration and triangulated semi-structured interviews with key stakeholder participants. The report also anonymised the personal and institutional affiliations of the stakeholders in order to protect their confidentiality and privacy.

Contextualising Highly Skilled Migration Patterns and Data in the UAE

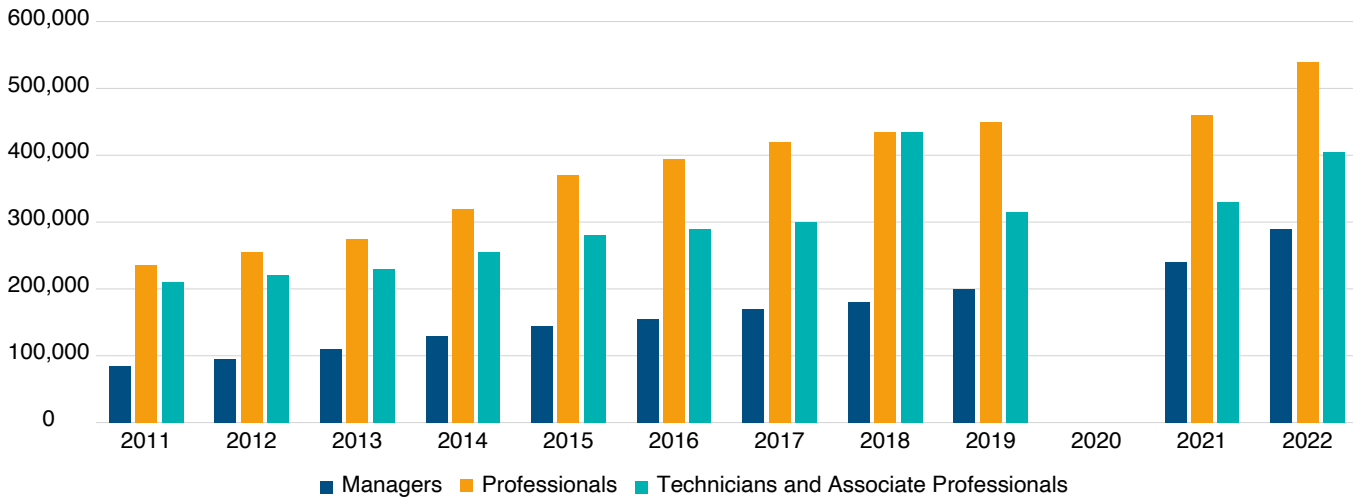
Despite their central significance and contributions across all six local UAE economies, highly skilled migrants in the UAE private sector have largely remained understudied. The UAE Ministry of Human Resources and Emiratisation

(MOHRE) broadly defines highly skilled migrants as managers, professionals, technicians, and associate professionals (see UAE government's website, 2024). Based on the Figure 1 data compilation from the UAE MOHRE (2011–2022), highly skilled migrants consistently increased in the UAE labour force even before or after the COVID-19 pandemic crisis, representing 19% of the UAE labour force population in 2019 prior to the COVID-19 pandemic. However, the share of highly skilled migrants increased to 22.6% in 2022, signalling an influx of highly skilled migrant populations, despite the recurring impact of the COVID-19 pandemic virus. Within the highly skilled migrant categories in 2022, professionals (43.64%) significantly outnumbered both technicians and associate professionals (32.88%) and managers (23.64%) employed in the UAE labour market.

In terms of the nationality breakdown of highly skilled migrant populations in the UAE, there is no official and publicly known data available provided by the UAE MOHRE, as well as other local and international think tank institutions focusing on the UAE. However, an extensive body of academic, policy, and industry findings revealed a highly racialised and segmented UAE private sector (Alnuaimi, 2022). Many non-White Westerners also tended to originate from Muslim backgrounds including North Africa, the Middle East or South Asia, with their families residing and working in the UAE, thereby transforming the UAE into an attractive destination for work and retirement for multiple generations. More specifically, the study focuses on three highly skilled migrant groups from large Arab (Egypt), Southeast Asia (Philippines, and South Asian (India) high-skilled migrant populations. While some public estimates on the share of highly skilled migrant populations exist, these statistical figures need to be further triangulated and used with caution, given the competing estimates from various government and international organisations. For highly skilled Indian migrants, the Indian Embassy in the UAE estimated that 15% of the 3.5 million Indians residing in the UAE were highly skilled professionals and businessmen (Embassy of India in the UAE, 2024). Of the nearly one million Filipino migrants in the UAE, at least 35% are considered highly skilled migrants, employed in various professions in the UAE private sector, including nursing, medicine, accounting, architecture, and engineering. A Filipino consulting company, EON surveyed 700 Filipinos in the UAE and found that at least 64% of the interviewees either held a university or a college degree, while 6.7% had acquired post-graduate certifications (EON, 2019). While Egypt's highly skilled migrants have historically been part of the evolving UAE private and public sectors (i. e., nurses, teachers, doctors etc), no state official data has been published related to the total share of skilled workforce vis a vis the total Egyptian migrant population in the UAE (Awad and Aziz, 2017). Existing estimates suggest that there are at least 400,000 Egyptians living and working across various high, semi, and low-skilled professions in the UAE public and private sectors (Amir, 2022

In addition, while there is no publicly available known wage data for highly skilled migrants in the UAE private sector, accessible industry wage data reveals wage discrimination and inequality (Tong and AlAwad, 2014; De-Bel Air, 2019), while others found them to be 'irrelevant' between Western and non-Western highly skilled migrant populations (AlFarhan and AlBusaidi, 2019). Despite their similar occupational

Figure 1: Highly Skilled Migrant Populations by Category of Professions (2011–2022)



*Source: GLMM (2024) (*Data were not reported in 2020)*

positions, non-Western highly skilled migrants from India, the Philippines, and Egypt tend to receive relatively less compensation or labour market reservation wage due to the nationality factor. These particular migrant compensation practices are not considered illegal; they are the byproduct of the laissez faire labour market forces that negatively impact non-Western highly skilled migrant workers. As a result, the UAE private sector hierarchy places non-Western highly skilled migrants much lower in terms of contractual labour rights (i. e., benefits), with local UAE nationals and Westerners dominating most of the top-level highly skilled positions.

Towards UAE Centralised Approach on High-Skilled Migration (2014–present)

After promulgating their national and local economic visions between the late 2000s and mid-2010s, the UAE has increasingly centralised its approach towards highly skilled migrant populations by incorporating them within their future agendas. Unlike other GCC countries, the UAE aggressively adopted a more flexible, internal labour mobility approach within the domestic *kafala* sponsorship system, allowing highly skilled migrants to move freely within the private sector labour market in line with the global labour market competitions. Key domestic policy strategies include the implementation of ministerial decrees 764, 765, and 766 in 2015, which addressed key labour and employment issues pertaining to contractual substitution, internal job transfer, and access to justice. It also eliminated employers' power to withhold passports, permission prior to job transfers, no objection certificates (NOC), and exit permits. Simultaneously, it granted full autonomy to UAE foreign residents, including highly skilled migrants, enabling them to own real estate property investments and open businesses without the need for local sponsorship from a UAE national across various private and freezone sectors in the UAE labour market (see analysis below). These comprehensive domestic reforms in the UAE labour market and legal system not only became 'high incentives' for highly skilled migrant populations to stay in the UAE but also explored long-term strategic entrepreneurships or possible settlement in the UAE (Ali and Cochrane, 2024). Key promising sectors, including the digital economy, artificial intelligence, research and development, information technology, communication services, logistical services and tourism, and financial technology, became vital attracting sectors for highly skilled migrants over the past decade. These strategic, incremental incentives, commitments, and reforms not only enhanced the centralisation approach of the UAE toward highly skilled migration but also signalled the liberalising effect of their regional and global modernisation strategies to elevate the UAE's status in the global economy.

However, when the global outbreak of the COVID-19 pandemic erupted in 2020, the UAE quickly introduced various legal, economic, social, and institutional schemes to tap both investment and skilled human capital in line with their long-term economic diversification aims. In fact, as the UAE and other GCC countries set highly ambitious plans, that also necessitated critical highly skilled human capital to execute these plans. Therefore, when the growing competition for highly skilled human capital intensified within the GCC region and beyond, the UAE government introduced various multilevel strategies to attract and retain highly skilled migrant populations in the national economy. In 2019, the UAE amended the 1972 citizenship law and, more recently, introduced the 'Golden Visa' programme for both wealthy investors and exceptionally high-skilled migrant populations (like doctors, nurses, and scientists) to achieve long-term settlement (10 years, renewable) in the country. These residency by investment or 'merit' pathways have not only attracted either wealthy or highly skilled migrants but also signaled the UAE government's strategic efforts to attract and retain them by removing the immigration bureaucratic processes and creating a long-term settlement pathway. The UAE government also used this Golden Visa initiative as a crucial tool to reduce the influence of employers or sponsors, allowing them to operate freely outside the *kafala* sponsorship system, which had previously regulated the internal labour mobility and rights of migrants. In fact, with the newly introduced Golden Visa, highly skilled migrants can self-sponsor themselves and their families and obtain employment, fully elevating their internal mobility power and options within the UAE labour market. In 2024, the Dubai emirate alone issued 158,000 Golden Visas in the country, signifying the country's growing success in attracting both investment and human capital (Ali, 2024).

Beyond the Golden Visa initiative, the UAE government has specifically introduced a diverse range of 'talent visas' to attract highly skilled migrant workers. The Green Visa, a five-year self-sponsorship visa that specifically targets exceptional high-skilled professionals in specific sectors within the UAE, allows migrants to live and work in any governmental, semi-governmental, and freezone companies without the need for a local employer or sponsor (see Government of Dubai, 2024). The UAE government further introduced the freelance visas for highly skilled migrant populations,

targeting and providing mobility pathways and opportunities for highly skilled migrant populations to remain in the country, specifically in the areas of media, education, technology, and design. The UAE government has introduced a new special visa category, known as the 'Job Seeker Visa.' This visa category enables prospective migrants, particularly those from the 'best 500 universities' globally, to travel to the UAE in search of employment (refer to the ranking of UAE passports and these visa types), without the need for a sponsor (refer to the UAE government website, 2024). In terms of job flexibility, the UAE government also introduced a 'digital nomad visa' (known as a remote worker visa or allowing highly skilled migrants or entrepreneurs to work remotely), thus enabling them to have greater autonomy and flexibility working with multiple clients in the UAE labour market. These particularly targeted strategies attracted highly skilled migrant populations and revealed the growing tactical centralisation approach to incentivising highly skilled migrant populations into the UAE economy. Overall, these legislative policy reforms pertaining to high-skilled visa categories reflect the UAE government's evolving strategic approach as well as their growing response to the intensifying geo-economic and political competition for high-skilled human capital within the GCC and beyond.

Moreover, the UAE has expanded regional and global mobility pathways for highly skilled migrant populations working in the private sector, thus contributing to the UAE's attraction and retention strategies. With a UAE highly skilled visa, highly skilled migrants with professional occupations (i. e., doctors, engineers, nurses, architects, and among others) have visa-on-arrival immigration privilege across the GCC countries and other neighbouring countries in Asia and the Middle East region. As the global economic status of the UAE rises, so does the mobility power of UAE visas, which in turn expands the options for future employment for highly skilled migrants within the GCC. As Meredith, a Filipino highly skilled engineer in the UAE, highlights:

> *'Because of my professional status in the UAE, I've been able to visit my family in other GCC countries like Saudi Arabia and even attended job interviews. This was not possible more than a decade ago, and a strong visa status is also key for future opportunities to look for other work.'* [4]

Another Egyptian IT consultant in Dubai, Amjad, adds:

> *'I've just attended a job interview in Saudi Arabia because I plan to move there. I was only able to do it because I'm visa on arrival as a professional, giving me the opportunity to look elsewhere.'* [5]

More specifically, the UAE has even offered Indian nationals with existing Western visas –often highly skilled professionals in the fields of IT, medicine, and among others—to enter the UAE on visa on arrival (for 14 days or 60 days), thus strategically attracting highly skilled Indian nationals to explore the UAE private sector (see Abdullah, 2024). Therefore, the increasing mobility power of UAE immigration and residency status has become an important attraction and retention strategy for the UAE to contain highly skilled population in the UAE private sector.

While the liberalisation of visa options aimed to attract highly skilled migrants, the UAE government also introduced other "soft" domestic reforms to retain highly skilled migrants in the country. For instance, the UAE government permitted non-nationals (i. e., see Law No. 19 of 2005), including highly skilled migrants, to own properties in various locations within the country. In some cases, many local UAE banks offered low interest rates to potential non-citizen buyers (with convenient payment plans) to enable them to purchase local real estate properties, thereby encouraging and incentivising these migrants to settle permanently (UAE Government, 2024). The government also implemented Federal Law No. 41 (UAE Personal Status Law), decriminalising conjugal partnerships and permitting unmarried couples to cohabit, despite decades-long opposition from various social factions in the country (Goel, 2023). The law also afforded more legal equality and protection to non-Muslim expats in the UAE, particularly in the areas of civil marriage, divorce, child custody, and inheritance. This provided an alternative form of non-Muslim social governance for non-Muslim populations, including highly skilled migrants. As a result, highly skilled migrants have also increasingly become attracted to the UAE, given the shift toward the liberalising nature of a modern, tolerant UAE society (i. e., religious freedom, conjugal relationships) (Lohrey, 2023; US Embassy in the UAE, 2020; AlJazeera, 2020). The UAE government has also approved the inclusion of more ethnic and international schools, allowing the children of highly skilled migrants to access cheap or global education across various levels in the country. In some cases, however, many high-skilled, high earning migrants are frequently provided with a schooling stipend for their respective children (as part of the salary package).These socio-economic reforms have not only helped the UAE government's strategy to attract and retain highly skilled migrants, but also made it a top and preferred destination for migrants around the world.

Apart from its modern infrastructure developed, the UAE government has also increasingly elevated its regional and global mobility pathways for highly skilled migrants

by allowing them to travel visa free within the GCC and, in some cases, enhanced their capacities to travel to other neighbouring regions or to the West (Singh, 2024). A Dubai visa centre official acknowledges:

> *'The UAE has a very diverse population, and most nationalities require visas to enter Schengen countries and the US. Our data shows that the majority of applicants (for the Schengen visa) during this period [in 2024] were Russians (35%), followed by Indians (23%), Filipinos (16%), Egyptians (7%), Jordanians (6%), and South Africans. We serve a diverse clientele, including families (58%) and individuals seeking our services for themselves or their families (Singh, 2024).'*

Highly skilled migrant populations have also increasingly preferred to stay in the UAE due to its geographic proximity to their families and infrastructural advancement vis-à-vis their home country. As one highly skilled Indian technology professional in Dubai, Haritha, highlights:

> *'I can move to the West, but I prefer to be closer to home. In Dubai, I can travel quickly if there is an emergency with my family. The geographical connectivity of Dubai, plus my access to my family is a key priority for me now, as I get older in life.'*[6]

The perceived domestic security, combined with the increasing 'mobility status' of a UAE visa that allows global travel, has indirectly become critical factors for highly skilled migrants to consider staying in the UAE. High-skilled migrants also view the UAE as a 'free country' that allows them to pursue both their professional and entrepreneurial interests while also accessing modern global infrastructure and opportunities at the local level. More importantly, high-skilled migrants have also increasingly preferred to stay in the UAE due to affordable care work for their children. This labour market structure has not only enabled the UAE government to create a conducive environment for highly skilled migrants but also made the UAE—specifically Dubai and Abu Dhabi—top 5 destination globally, citing UAE's 'strategic positioning of the Emirates, accentuated by its safety and progressive outlook, makes it a burgeoning hotspot for the global workforce. In addition, the confluence of exceptional job quality, competitive incomes, and an enriching lifestyle makes the UAE a beacon for ambitious professionals.' Overall, UAE's centralised transformation on governing highly skilled migration reflects the strategic advancement and commitment to cultivating an environment thriving on diversity and opportunity (Baier et.al, 2024).

Outcomes of UAE's Centralised Approach on Highly Skilled Migrants

The UAE's centralisation approach towards highly skilled migration has significantly attracted, and in some cases, resulted in differential retention outcomes for highly skilled migrants from the Philippines, India, and Egypt in the UAE private sector. While the UAE's centralisation approach has greatly extended benefits to existing highly skilled migrant populations and their children in the UAE, specifically those multigenerational diasporas (2nd, 3rd, and 4th generations), they also reinforced existing socioeconomic inequalities, triggering other highly skilled migrants to exit and pursue transit migration via the UAE and other GCC countries.[7] Drawing from semi-structured interviews and content analysis of various government, public policy, and social media publications, the following findings reveal a much more complex outcomes for the UAE's centralisation approach towards highly skilled migration.

While the UAE has relatively speaking maintained both regional and global competitiveness for attracting highly skilled migrant populations prior to 2014 period, the recent centralisation approach has further enabled the UAE to further cement its global position as the most preferred host destination in the Gulf and of the Global South region. Multiple regional and global public employment polls acknowledged that the UAE is ranked in the top 10 destinations because of exceptional 'life and opportunities' (see the National, 2024). Other global research findings cited UAE's growing economic stability, income tax exemptions, political security, unemployment protection, and end-of-service benefits as critical labour market indicators (see Arabian Business, 2024). Drawn from various 300,000 contracts in more than 130 countries, publicly available reports have acknowledged UAE as part of the 'top ten' destination for employment (see Zawya, 2024). As one GCC recruitment consulting expert acknowledges,

> *'The country's commitment to talent, innovation and a dynamic business environment is clearly resonating with international professionals and solidifying its position as a top hiring destination....'*

He further added that the diverse and multicultural workforce is the UAE's "greatest asset", adding that by attracting and retaining global workers, the country is positioning itself for continued economic growth, specifically attracting top professionals (see Zawya, 2024). These highly coveted 'promising sectors' include key economic industries in

the UAE that are witnessing a steady growth in the flow of investments…such as advanced technology, artificial intelligence, research and development, and digital economy, which stimulate innovation and improve the performance of the economy (see UAE Ministry of Economy, 2024). With the introduction of the Golden Visa, Mohamed, a high-skilled Egyptian business consultant migrant in Dubai acknowledges:

> *'The Golden Visa created a pathway for highly skilled migrants like me to effectively integrate in the UAE society, without having to renew their visas every two to three years. This gives us stability and proper settlement options. This long-term residency thus further shaped their long-term settlement or integration, since UAE also offers retiree visas, especially for high-income, highly skilled migrants living and working in the UAE'.*[8]

With the growing centralisation strategies towards highly skilled migrants, the UAE has also further attracted a vital space for multinational corporations to operate in the country, thus increasing more influx of investments and highly skilled migrants into the country. In fact, despite Saudi Arabia's expansive incentives, many UAE-based multinational companies still conveyed strong preference of remaining in the UAE due to its global cosmopolitan, security, infrastructure quality, and other economic benefits in the host country. In contrast, to other GCC countries, the UAE initially introduced the Golden Visa programme, and it globally became a critical attraction for highly skilled migrants seeking to enter and work in the UAE private sector, which, in some ways, aided the increasing domestic shortages of labour. More specifically, highly skilled migrants within these multinational corporations have highlighted the relatively flexible labour market structure in the UAE private sector.

A key feature of UAE's highly skilled migration governance strategy is the establishment of the flexible visa option, which has exponentially increased remote work for the UAE highly skilled working professionals (Gulf Talent, 2024). In fact, a Gulf Talent's survey of 4,000 professionals and 1,000 managers based in the six GCC countries found that while 82% work in official spaces, 18% work in remote, whereby the UAE leads in remote and hybrid work adoption, available to 21% of working professionals in comparison to other GCC states like Oman and Kuwait (both at 14%), Saudi Arabia and Bahrain (both with 13%), and Qatar (just 12%). In terms of company type, UAE-based startups and multinational companies demonstrate the highest propensity for remote work, with a prevalence of 29% and 28% respectively, while large private firms and government-owned entities exhibit the least inclination towards such arrangements, with adoption rates of just 12% and 13% respectively. IT and Advertising companies are at the forefront of remote work implementation due to the mainly desk-based, individual nature of their work, while construction and manufacturing companies display the lowest adoption rates due to the inherent operational needs of their industry. This private sector flexibility has therefore made the UAE a competitive, attractive destination for diverse highly skilled migrants living and working in the long run. Another highly skilled migrant in the UAE, Mohamed, emphasises:

> *'The remote visa is perfect for us here because we are able to work and live in the UAE and travel to other regions, while making money and taking care of our families. Dubai's geographic location is a blessing, plus the expanding aviation industry, which allows us to pursue our careers to the next level.'*[9]

Because of such centralisation efforts linked with long-term settlement, the UAE, specifically Dubai, has also succeeded in not only attracting highly skilled migrants but also encouraging immigrant entrepreneurship. In 2019, the Global Entrepreneurship Index highlighted that 8.2% of adult population in the UAE are classified as entrepreneurs, while noting that 87% of UAE entrepreneurs are migrant workers (see ElMassah et.al, 2022). As part of the UAE's centralisation approach, both investment and merit-based Golden Visas have not only attracted high-skilled migrants and investors to stay in the UAE but also created a pathway for some highly skilled migrants to enjoy the long-term settlement (10 years, renewable), thus both containing and contributing essential human capital and financial capital to the UAE's economic growth and development. As one Filipino nurse, Karla, turned into an entrepreneur:

> *'I earn a lot in the UAE, I don't need to move to the West. Golden Visa gives me time to plan and invest for my family and myself. I can work at the hospital and maintain my business, while not thinking about renewing my residency every two years. The Golden Visa is a good sign that UAE is changing, and we are part of the community.'*[10]

However, other highly skilled migrants (i. e., nurses, accountants, engineers) earn less than the financial requirement (AED 30,000) to qualify for Golden Visas, thus giving less incentives for them to stay in the UAE private sector. A highly skilled Egyptian migrant, Majid, emphasises:

> *'The American dream is everyone's hearts, but the Gulf like the UAE allows us to save more money, shield our children*

from violence and racism. We have access to good schools too in the UAE, and our kids are safe here too.'[11]

In a way, highly skilled migrants weigh both the complex differences between the geographic, cultural, social, and political contexts in both regions, making the West an option, rather than a necessity for high income, high skilled populations.

With the UAE's growing centralisation approach via legal and socio-urban transformations, highly skilled migrants have conveyed strong preference to stay in the UAE due to its modern social infrastructures, which significantly enabled the UAE to become the most attractive host destination across the GCC and beyond. Multiple surveys, including the Gulf Talent, have extensively emphasised from 2007 and 2016 the critical roles of modernised public infrastructures in high skilled migrants' decision to choose the UAE over other host countries in the GCC and beyond. As one Egyptian highly skilled migrant, Ahmed, highlights:

'When I got married, I brought my family here and raised two children. There are good international schools here, and we have access to good space, like parks, good hospitals, good restaurants educational facilities, and multicultural communities, exposing our children to globalisation. We can also travel easily to Egypt to see our family and have vacation in other facilities.'[12]

Other highly skilled migrants have also highlighted the accessibility, affordability, and global quality of public infrastructures crucial to their long-term settlement options. An Indian highly skilled migrant working in IT, Faisal, adds:

'We work in multinational companies, and we have good insurance coverage for our kids and ourselves. They pay for this access, giving us top level quality healthcare and other amenities. We can live the Western life here, while also being close to our families in India.'[13]

In a way, the complementary influence of a long-term settlement options, combined with modern socio-urban infrastructures, has significantly contributed both to the attraction and retention of diverse highly skilled migrants in the UAE.

With the centralisation of UAE's strategies towards high-skilled migrant populations, high-skilled migrants, specifically second and third generations, have also increasingly developed some form of conditional, partial integration into the country. With the introduction of the Golden Visa, high-skilled migrants and their children have highlighted that such long-term settlement pathways have also legally eliminated the power of the *kafala*, allowing them to change employers without any sectoral bans in the private sector. One Egyptian highly skilled migrant, Ahmed, in a top-level managerial position adds: 'the power of the Golden Visas is the ability to change employers anytime, without any repercussions. We could not do that before; employers save recruitment costs and we become preferred than other candidates, assuming that we have similar options.'[14] Children of highly skilled migrants have also expressed stronger confidence after acquiring Golden Visas from the UAE, highlighting that the Golden Visas have allowed them to generationally do better than their parents either by taking higher paying jobs with the mobility power or move to the West as an option. Marcos, a son of a highly skilled Filipino migrant emphasises:

'We have a Golden Visa now and can renew this after ten years. We have a good base, and good chances to better find employment match for us without facing any immigration overstay pressures. We can also seek better opportunities to explore moving to the West. I hope to go to Canada, get the nationality, and return to the UAE to work here because the opportunities are better, with a Western nationality. My family are here, and want to be here.'[15]

Therefore, the legal dimension of UAE's centralisation governance towards highly skilled migration has not only reshaped the existing power imbalances within the *kafala* sponsorship system but also became a multigenerational attraction and retention pathways for subsequent children of highly skilled migrants in the UAE.

However, despite successfully attracting, and in some cases, potentially retaining highly skilled migrant populations and their children, the fieldwork findings reveal some structural retention challenges in incentivising other highly skilled migrant populations to stay in the UAE private sector. This structural retention problem in the UAE private sector poses direct threats to their economic development and stability as well as the complex presence of growing 'skills gaps' within national economies. Key labour shortages remain across the GCC across various sectors like technology (fintech); however, in recent years, Gulf states have increasingly achieved some varying successes, specifically in the retention policies (El Zein and Rizk, 2017; Sambridge, 2023). A PwC poll further identified that 54% employees reported that there is shortage of human capital talent, therefore indicating the continuing future demand for high-skilled migrants across sectors in the country. While some

highly skilled migrants managed to obtain long-term settlement options (i. e., managers, managing directors, other professionals), the vast majority, specifically those earning below AED 30,000, often reject the retention offers in the UAE private sector. In fact, the vast majority of these highly skilled migrants tend to view UAE as a temporary transit space for their future migration pathways.

Despite similar occupational status, many highly skilled migrants complained that they do not receive equal compensation due to their nationality background. The social inequality and labour market discrimination thus directly impacts the UAE private sector's retention strategies in the country. As a Filipino nurse, Mitch, who now lives in London as a registered nurse, highlights:

> *'I worked in the UAE for seven years, and there was no career path for me. I work as a regular nurse, but there is no option for me to go up in the ladder. The wage is also stagnant, and Westerners tend to get paid higher even though they have less experience."*[16]

Others like Mary, a Filipino nurse, acknowledged that despite her Golden Visa acquisition:

> *'There are* wage discriminations *here and it is hard to earn high here because the wage is unfairly linked with nationality. I also need career mobility rather than just being a nurse; UAE cannot give me this kind of career options in the future."*[17]

Beyond these wage discriminations in the UAE, highly skilled migrants also highlighted the rising cost of living, indirect taxations (fines, value added taxes) and stagnant wages as key factors shaping their decisions to transit out of the UAE. More specifically, both older and young highly skilled migrant populations explore the potential role of retirement and pensions, which the UAE has yet to fully offer, while highlighting the Europe's social welfare system (ILO, 2024).

Similarly, another Indian highly skilled migrant doctor, Ganesh, in Dubai:

> *"There is no pathway for citizenship for me here, and I plan to migrate to Canada or UK soon because I need the right passport to compete globally and give a better life for my family."*[18]

These labour market discriminations clearly push many high-skilled migrants in the UAE to transit out of the country, despite some potential options to secure a Golden Visa (Tong and Awad, 2013; ElSayed, 2024). One highly skilled Egyptian migrant, Mohammed, highlights that:

> *'Golden Visa is good if you earn high here, have a family, and you own a business. But if you earn less with family and kids, you think about their future, and getting a Western passport is the only way for me and them to get up."*[19]

As a result of these discriminatory labour market dynamics and legal constraints, many highly skilled migrants opt for transit migration as an alternative pathway, thus threatening the retention ambitions of the UAE government.

In comparison to highly skilled Filipino migrants, highly skilled Egyptian and Indian Muslims similarly express less intention to transiting to the West due to growing religious contentions and hate towards Muslims and discriminations. Fieldwork interviews reveal, specifically for those with Golden Visa status in the UAE, that while highly skilled Filipinos' sectoral concentrations (engineers, nurses, doctors, architects) tend to move to the West, Egyptian and Indian Muslims tend to stay in the UAE, given the relatively high wages, geographic proximity to the family, and the infrastructural modernisations in the UAE. One Egyptian high-skilled migrant, Marcos notes:

> *'The current situation is like the 9/11 before, and we don't want to expose our kids there in the West. We make money here and even save, and in the US or Europe, most of our income goes to tax, plus prejudices against us. We have good jobs here, good security in the country, cars, access to food and vacation, and we want to stay here.'*

Another Indian highly skilled business manager, Wasim, acknowledges:

> *'I've raised my children in Dubai, sent them to school here, and managed to also send them to universities in the UK and US. My kids will return to the UAE to come and work here and start business and join our families together. The Golden Visa made this easier for us, and we can now live in multiple places but use Dubai as our home.'*[20]

While Europe and North America were highlighted as key preferences for Indians, Egyptians, and Filipino high-skilled migrants, the current geopolitical and security contexts in these Western countries do not match their current preferences, thus triggering a range of various transit migration decisions for various high skilled migrant groups in the UAE.

Conclusion

This report analysed the UAE's strategies for attracting and retaining highly skilled migrants, highlighting the following key findings: firstly, the UAE has increasingly shifted from laissez-faire to a centralisation approach towards governing highly skilled migrant populations. While the introduction of a diverse range of legal, social, and economic reforms successfully attracted high-skilled migrant populations, the benefits of 'soft infrastructure' (such as public infrastructure, mobility pathways, and access to education for the children of high-skilled migrants) have played a relatively stronger role in retaining them.

Secondly, due to their growing geopolitical and economic goals (vision plans), the UAE has intensified their centralisation strategies to attract highly skilled migrant populations that are crucial to their current and future domestic industries, which are linked to their long-term economic planning. The increasing regional and global competition for high-skilled migrants have intensified the pressure on the UAE to implement reforms to effectively attract, retain, and incentivise highly skilled migrant populations to remain. However, there is a dearth of evidence demonstrating the direct impact of existing UAE incentives on the permanent presence of highly skilled migrants in the country, given the changing regional and geopolitical dynamics in the GCC region. In fact, a growing body of scholarly research highlights the high-skilled migrants' use of the UAE—and other GCC countries—as a 'transit' state for future migration to the West, thereby posing critical long-term developmental capacity issues for the UAE economic development process.

Thirdly, the UAE's domestic reforms (i. e., the right to own property, invest, and retire) directly contributed to their regional and global competitiveness, thus enabling them to attract both highly skilled migrants and investors. In some cases, these decisions have generationally influenced highly skilled migrants to consider the UAE as a long-term settlement pathway, which could generate critical economic and human capital gains as they increase their social mobility status in the region. However, this incentive may not necessarily encourage all professional high-skilled migrants of middle-class status, such as nurses, engineers, and doctors, to remain in the UAE, thereby presenting challenges to the UAE's ability to provide long-term opportunities for them.

Fourthly, as UAE economies expand, the prevailing high-skill gaps in the UAE market not only pose an immediate threat but also functionally require high-skilled migrant populations to drive strategic innovations in various non-oil sectors like tourism, real estate, transportation, and manufacturing. In these long-term economic vision plans, the UAE strategically highlighted the need to extract and utilise the knowledge and expertise of highly skilled migrant populations in order to effectively achieve a knowledge-based economy. These are not only crucial to their massive transformation programmes but also necessary to address their technological and demographic needs.

However, while the UAE strategically managed to liberalise their existing institutional and legal approaches towards high-skilled migration, they also confront structural challenges that directly impact their capacities to sustain their pro-high-skilled migration approaches. A key challenge revolves around their UAE localisation efforts, placing non-nationals in various UAE private sectors to diversify the high concentration of GCC nationals within the GCC publications. In fact, the UAE has been carefully balancing its localisation mandates, even as it has increasingly required local UAE-based firms to hire local populations, often with corresponding incentives or sanctions in the labour market for failing to comply with the UAE government. These localisation efforts neither align nor complement the growing centralisation efforts of the UAE in attracting and retaining highly skilled migrant populations. Therefore, finding a 'common ground' is vital in order to create a win-win scenario for the UAE and high-skilled migrant populations in the domestic labour market.

The UAE—like other GCC countries—is facing a critical crossroads in developing complex migration governance approaches toward various highly skilled migrant populations in the UAE private sector. As regional and global competitions for skilled migration intensify, the UAE is likely to further liberalise its domestic economic, legal, and social policies in order to accommodate the complex needs of highly skilled migrant populations. This approach is in line with their existing national principles on tolerance, humanitarianism, and modernity. However, future research agendas should critically examine various labour and employment issues faced by highly skilled migrants, like wage inequality, discrimination, citizenship, and others, in order to equally bolster their attraction and retention outcomes in the long run (see AlObaidli, 2021). Overall, the UAE's growing diverse highly skilled migrant populations reflect the country's potential to transform and link its existing long-term global human assets (highly skilled migrants) with regional and global economic strategies, a critical move to foundationally secure their ambitious socioeconomic visions and goals in the long run.

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Endnotes

1 These long-term economic plans include national (UAE Vision 2031, UAE Centennial Vision 2071) and local (Abu Dhabi Economic Vision 2030, Dubai Vision 2030, Dubai Economic Agenda 33 or 'D 33 Agenda') specific plans, which are intended to accelerate economic growth and diversification.

2 Semi structured interview in Dubai (October 2024)

3 While the UAE publicly announced the introduction fo the Golden Visa programs, it specifically targeted residency by investment rather than the merit-based pathways for highly skilled. Please note that this Golden Visa evolved initially, rewarding highly skilled migrants in high-risk sectors (like nurses, doctors) etc, and later further expanded the program.

4 Semi-structured interview in Dubai (October 2024).

5 Semi-structured interview in Dubai (October 2024).

6 Semi-structured interview in Dubai (October 2024).

7 The UAE's centralization approach was designed to attract not only highly skilled mirants but also offer easier mobility pathways, integration, and other modern infrastructural facilities and services to their children to create a more conductive integration process, which are integral part of their retention strategies in the UAE labour market.

8 Semi-structured interview in Dubai (October 2024).

9 Semi-structured interview in Dubai (October 2024).

10 Semi-structured interview in Dubai (October 2024).

11 Semi-structured interview in Dubai (October 2024).

12 Semi-structured interview in Dubai (September 2024).

13 Semi-structured interview in Dubai (October 2024).

14 Semi-structured interview in Dubai (October 2024).

15 Semi-structured interview in Dubai (September 2024).

16 Semi-structured interview in Dubai (October 2024).

17 Semi-structured interview in Dubai (September 2024).

18 Semi-structured interview in Dubai (October 2024).

19 Semi-structured interview in Dubai (October 2024).

20 Semi-structured interview in Dubai (October 2024).

B

A View from Migrants' Countries of Origin

3

Trends, Dynamics and Policies regarding Highly Skilled Migration from Tunisia to Saudi Arabia, Qatar and the UAE

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Abstract

The migration of highly qualified Tunisians to the Gulf Cooperation Council (GCC) countries began in the 1970s, through formal mechanisms supervised by Tunisian public institutions. Over the decades, this phenomenon has undergone significant changes, both quantitatively and qualitatively, with a significant increase in the number of migrants and a gradual feminisation of flows.

Professional motivations remain the main driver of these movements, although migrants' aspirations are diversifying, particularly in Qatar, where opportunities are emerging in strategic sectors. Traditionally concentrated in the fields of education and health, the demand for qualified Tunisian workers has extended to tertiary sectors, such as management, information technology, and trade, particularly in the United Arab Emirates.

However, the Gulf region is now facing increasing competition from Western Europe and North America, which are attracting a growing share of this skilled population. This dynamic highlights mixed perceptions of migration: while the associated remittances are a valuable economic resource for Tunisia, the brain drain is worrying, carrying with it risks for national stability and long-term development. This report, based on a literature review, surveys, and administrative data, as well as semi-structured interviews, highlights the urgent need for a strategic approach. A national migration policy aligned with economic, educational, and social priorities, combined with the strengthening of partnerships with the GCC, could improve the management of flows while maximising the contributions of skilled migrants to Tunisia's socio-economic development.

Introduction

Framework and Purpose of the Study

This report is part of a joint study on skills migration to the Gulf region, a collaboration between the Gulf Research Centre and the Konrad Adenauer Foundation. It analyses trends in the migration of highly skilled workers to Qatar, Saudi Arabia, and the United Arab Emirates. The Gulf Cooperation Council (GCC) region has become a magnet for global talent, making it crucial to examine the factors influencing this migration. Gulf countries are actively seeking to attract skilled workers to maintain demographic and economic balances. In contrast, sending countries, such as Tunisia, perceive this migration both as an opportunity to solve internal economic problems and as a threat to their stability due to outflows of highly skilled individuals. The Tunisian diaspora, representing approximately 14% of the total population,[1] has evolved over the last decade in terms of size and composition, with an increase in young people, women, and graduates.[2] This report aims to understand this migration dynamic from various political, economic, and social perspectives.

Objectives

This study has three specific objectives. First, it seeks to analyse the demographic and professional characteristics of qualified Tunisian migrants in the Gulf countries. Then, it aims to study the impact of the migration policies of the GCC countries on migration choices. Finally, it assesses the effects of this migration on economic and professional relations between Tunisia and the destination countries, with the aim of informing Tunisian policymakers.

Methodology

The study adopts a clear methodology mobilising several data sources and investigation techniques. It begins with a literature review which includes the examination of previous reports, specialised literature, and Tunisian legal texts related to migration. At the same time, the study uses statistical data from national and international surveys, including the INS TUNISIA-HIMS survey (2021), as well as administrative data to update the information and compensate for the lack of available statistics. Finally, semi-structured interviews are conducted with institutional officials responsible for the emigration of Tunisians abroad. This diversified approach provides a comprehensive view of the migration of highly skilled Tunisians to the Gulf states.

Tunisian Emigration: Governance Frameworks, Trends, and Profile

The following section outlines the contours of Tunisian labour migration to their chosen destinations. This provides a better understanding of the migratory dynamics of highly qualified Tunisian workers to three specific GCC countries: Saudi Arabia, the United Arab Emirates, and Qatar. The research focuses first on labour migration governance frameworks, followed by a summary profiling of Tunisian migrants.

Governance Frameworks

The below is an examination of the Tunisian legal framework on labour migration, the institutional landscape, the data production system, and international cooperation agreements between Tunisia and its partners.

Regulatory framework

In the context of labour migration, the current legislation is somewhat restraining in terms of the portability of rights of Tunisian migrants. Tunisian migrants, however, are becoming of great interest to policymakers, as evidenced by the growing diversity of legal material targeting them, in terms of nature and scope.

Generally speaking, Tunisia has fairly extensive legislation covering social protections for its nationals working abroad, including agreements established with host countries as well as the provisions of its national legislation. The recruitment of Tunisian migrants is also governed by policies and agreements ensuring a minimum standard of protection for those working abroad. For example, Law No. 85–75 of July 20, 1985, relating to the regime applicable to technical cooperation personnel and the texts that amended it, as well as Law 2010-49 of November 1, 2010, relating to agencies for the placement of workers abroad, constitute the national legal pillars dealing with the employment of Tunisian nationals in host countries.

Institutional framework

The Tunisian institutional landscape pertaining to labour migration is quite diverse. Many institutions are involved in the management of migration, each committed to supporting migrant workers in various degrees and capacities. The objective of this analysis is not to detail the specificities of each of these institutions, their detailed functions or the origin of their administrative supervision, but rather to analyse their contribution to the management of migration flows, and to identify target markets and affected populations, in order to understand the operating logic and the degree of inclusion of their actions.

Public authorities encourage labour migration as a tool to mitigate the excess supply of the labour force. The regular and sustained increase in unemployment rates, especially among the youth and female graduates,[3] explains why the public as well as the private sectors were entrusted with the task of finding employment opportunities abroad for the Tunisian workers.

Originally, public job placement agencies were supposed to cover two different categories of the population: civil servants of public companies and managers in the private sector with professional experience were to be dealt with by the Tunisian Agency for Technical Cooperation (ATCT), while young professionals, first-time job seekers, and seasonal workers were directed to the National Agency for Employment and Independent Work (ANETI). Gradually, economic and political factors spurred conflicts of interest between the two agencies, which led to some unnecessary competition. The private sector is also present; with around fifty recruitment agencies whose scope of work is outlined by the Ministry of Employment and Vocational Training (MEFP).[4]

Data

Data on international migration in Tunisia are divided into two categories: Statistical data and administrative data. Statistical data, mainly provided by the National Institute of Statistics (INS), come from censuses, labour force surveys, and from the Tunisia- HIMS national survey conducted within the European Commission's MEDSTAT-led Mediterranean Household International Migration Survey (MED-HIMS) programme, which analyses in detail the characteristics of Tunisian migrants abroad. Administrative data, for their part, are collected by various ministries, in particular by the Ministry of Foreign Affairs via the JALIA file, which faces centralisation and updating limitations, leading to overestimations of the number of Tunisians abroad. The OTE also centralises information on Tunisians abroad to ensure their social protection. Other institutions, such as the Central Bank and ANETI, collect data on remittances and employment. The ATCT hosts the most comprehensive database on migrant workers. The present report is mainly based on data from the Tunisia-HIMS survey and those from the ATCT.

International cooperation

Tunisia is actively engaged in international cooperation on labour migration through multilateral and bilateral mechanisms. As a member of organisations such as the United Nations (UN), the International Labour Organization (ILO), and the African Union (AU), it participates in global and interregional processes. In collaboration with the European Union, Tunisia signed a memorandum of understanding (MoU) on mobility in 2015, followed by a second MoU in 2023,[5] of which migration is one of the key pillars.

On the bilateral level, several agreements have been signed with neighbouring and European countries, including France, Italy, Switzerland, Germany, and Malta. However, cooperation with the Gulf countries is limited, with the exception of an MoU with Qatar in 1981.[6] Keen to modernise cooperation practices in the area of migration, Qatar is planning to open five new visa issuing centres in Jordan, Tunisia, Morocco, Kenya, and Indonesia.[7] Despite the intensity of migration flows to these countries, the cooperation framework remains weak, which underlines the need for a more formalised partnership to promote decent jobs and to meet the country's labour needs. To improve the effectiveness of international cooperation, it would also be beneficial to involve other actors, such as trade unions and professional associations, in the implementation of key labour initiatives.

Emigration of Tunisians: Trends and profiles

Constantly evolving migration, accelerating since 2004

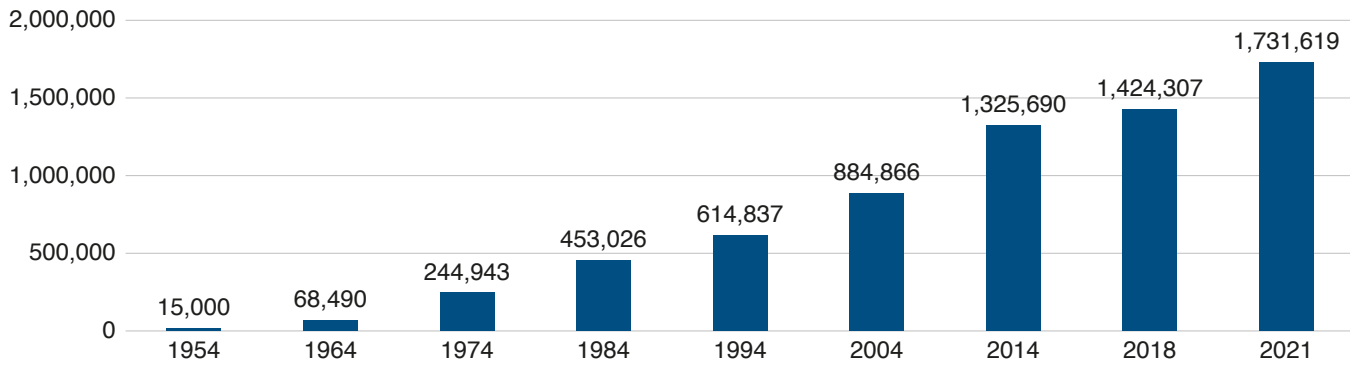
The migration of Tunisians represents a historical phenomenon. Without going back too far, we can pinpoint the first waves of organised migration in the early 1960's. The number of Tunisians Residing Abroad (TRE) has changed drastically since then, and has been growing steadily, particularly since the 2000s. As shown in the figure below, there were around 50,000 Tunisian residing abroad in the period 1954–1964, compared to 440,824 for the period 1994–2014 (i. e. the largest gap of all periods combined).

This observation is consistent with the results from the Tunisia HIMS survey, which records 566,000 Tunisian migrants residing abroad,[8] more than half of whom migrated since 2010 (283,000 individuals, or 49.51%). Similarly, according to ATCT figures, the stock of Tunisian workers placed by agencies in different countries around the world increased from 9,786 individuals in 2010 to 26,244 in 2014.

An increasingly noticeable presence of women

The second observation, corroborated by numerous statistical and administrative sources, points to the increase in the presence of women among Tunisian migrants. Table 1 highlights the changes in the share of females according to two different sources (statistical and administrative).

Figure 1: Evolution of the Number of Tunisian Residing Abroad (TRE) (1954–2021)



Source: DGAC (MAEMTE) and OTE

Table 1: Emigration by Gender

		Men (%)		Women (%)	
Source	**Nature of Source**	**Period 1***	**Period 2***	**Period 1***	**Period 2***
RGPH	Statistical	84.63 (2004)	83.30 (2014)	15.37 (2004)	16.70 (2014)
JALIA	Administrative	64.40 (2009)	61.50 (2021)	35.60 (2009)	38.50 (2021)
HIMS	Statistical	68.50 (2021)		31.50 (2021)	

Source: Author's compilation

Work as the main reason for emigration

The third element characterising Tunisian migration, confirmed by all the sources used, concerns the drivers underlying emigration from Tunisia. A comparison between the figures of INS censuses of 2004 and 2014 shows that, despite a decrease in outflows (from 76,474 to 65,927), the proportion of those who emigrated for professional reasons remained relatively high (71.1% in 2004 and 73.4% in 2014). The Tunisia HIMS survey provides additional insights on the relative share of this reason to emigrate, as well as on its changes over time (Table 2).

For nearly seventy years, the search for employment has remained the main motivation of Tunisian emigrants. The rate of departures reached a notable peak during the period 2010–2014, corroborating the hypothesis that the context surrounding the 2011 revolution pushed many Tunisians to leave the country.

Studying abroad also gained prominence as a reason for emigrating, especially since 2011, in parallel with vocational and professional reasons. This indicates a degree of uncertainty regarding their employment prospects among young Tunisians, who consider migrating from the start of their student years.

An increasingly educated population

According to data from the Tunisia HIMS survey, the distribution of current migrants by level of education is as follows: 15.6% have a primary education level, 38.7% a secondary education level, 6.6% a professional education degree, and 34.5% a higher education degree. This distribution varies according to the period of emigration as well as geographical factors. Over time, significant changes are observed in the level of training and education of Tunisian emigrants. As shown in Table 3, the emigrant population, which was initially mainly composed of poorly educated individuals, has gradually gained in qualifications. Nearly 60% of those who emigrated between 1956 and 1990 held at best a primary level certificate. Whereas during the period 2010–2014, approximately half of migrants held at least an undergraduate university degree, which underlines the changing educational profile of Tunisia emigrants over time.

Table 2: Reasons for Emigrating from Tunisia According to Period of Departure from the Country (%)

	1956–1990	**1991–1999**	**2000–2004**	**2005–2009**	**2010–2014**	**2015–2020**	**Total**
Searching employment	45.6	40.1	42.3	41.1	50	45.9	45.1
Improving income and quality of life	9.3	14.5	7.9	9.7	9.4	11.4	10.4
Studies/vocational training	6.1	7.3	6.3	9.1	12.9	17.9	11.6
Reuniting with family	37.3	36.1	42.8	39.9	27.2	23.3	31.9
Other reasons	1.7	2.1	0.7	0.1	0.6	1.5	1.1
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source: INS—Tunisia HIMS (2021)

Table 3: Distribution of Tunisian Emigrants According to Period of Departure and Level of Education

Period of departure	Level of Education (%)					
	None	Primary	Secondary	Upper	Professional	Unknown
1956–1990	29.4	29.9	14.9	10.7	11.5	3.6
1991–1999	13.1	40.7	26.6	13.0	63.0	0.6
2000–2004	2.4	21.2	43.4	23.0	9.0	0.9
2005–2009	0.9	9.8	48.0	35.1	4.8	1.3
2010–2014	0.8	6.8	37.4	48.1	5.9	1.0
2015–2020	0.0	1.7	22.4	5.9	0.0	70.0

Source: INS, Tunisia HIMS (2021)

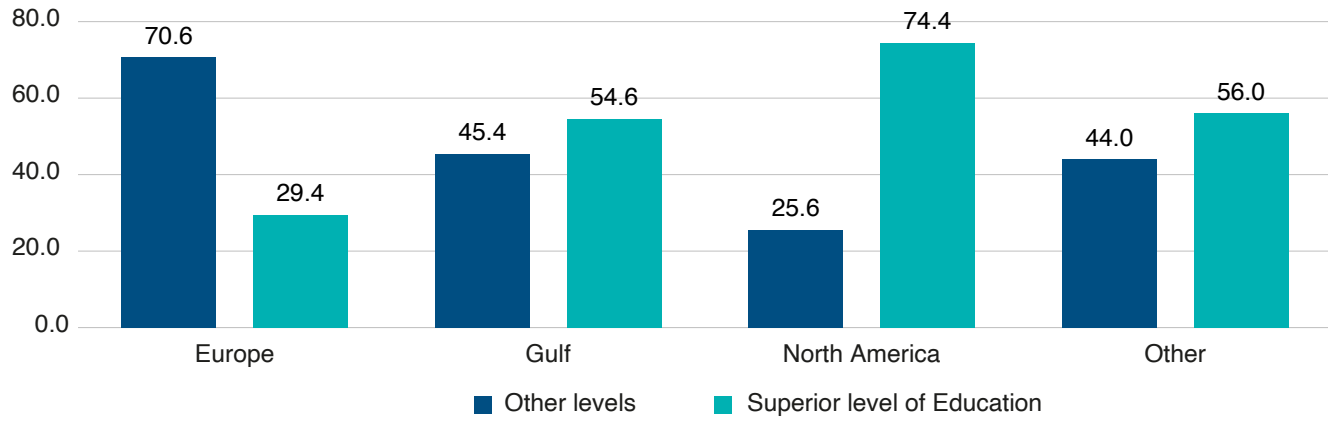
Geographically, the distribution of Tunisian emigrants by level of education in each region of destination reveals notable differences. As shown in Figure 2, a majority of Tunisians living in North America hold a university degree (74.4%), while those living in Europe display a more modest level of education on average. In Arab countries, there is near parity, with a slight predominance of individuals with a higher education degree compared to lower education levels (54.6% versus 45.4%). It is also interesting to note that the significant presence of higher education graduates among Tunisians in North America and in Arab countries cannot be explained by the same factors. According to analyses based on Tunisia HIMS data, which combine education level, motivations for migration, and major regions of residence, it appears that the first group migrated to North America mainly for studies (30.4%), while the second group headed to the Arab Gulf countries mainly for professional reasons (53.7%).

Europe as the main destination

The Tunisia HIMS survey indicates that most Tunisian emigrants are located in Europe, which is home to 83.3% of all current Tunisian migrants. Three countries alone host three-quarters of this population: France (52.5%), Italy (14.1%), and Germany (8.2%). North America attracted 4.0% of these migrants, with 2.5% in Canada and 1.5% in the United States. In addition, 11.4% of emigrants are in Arab countries.

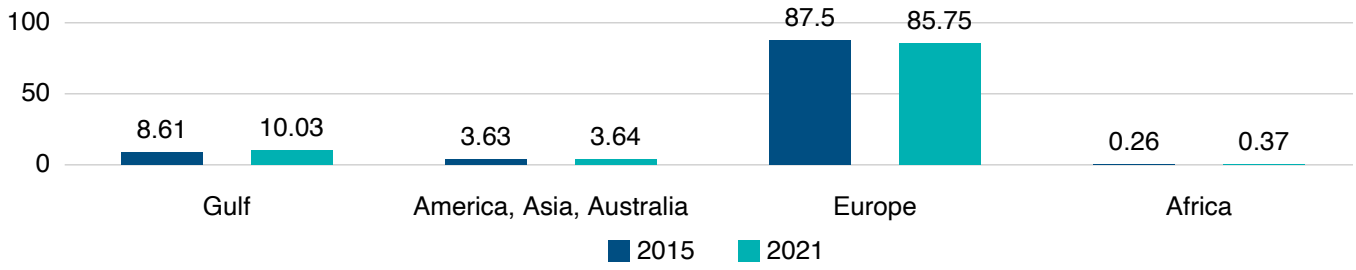
This pre-eminence of Tunisians in Europe is confirmed by figures from the Ministry of Foreign Affairs, Migration and Tunisians Abroad (MAEMTE), which estimate this percentage at 85.75% of the total migrant population in 2021. However, as indicated in Figure 3, this concentration decreased slightly between 2015 and 2021, revealing the emergence of other destination areas. The Arab Gulf region, in particular, recorded an increase in the proportion of Tunisians (see Figure 4).

Figure 2: Distribution of Current Migrants by Region of Residence and Level of Education (%)



Source: INS, Tunisia HIMS (2021)

Figure 3: Evolution of the Proportion of TRE by World Region (%) (2015–2021)[a]



Source: MAEMTE

a Figures calculated on the basis of consultation of data relating to the number of Tunisians registered in the consular files of the MAEMTE for the years 2015 and 2021.

More specifically, according to MAEMTE data, the stock of Tunisian residents in Saudi Arabia, the United Arab Emirates, and Qatar evolved between 2015 and 2021. The number of Tunisians in Saudi Arabia increased from 21,086 to 29,009, Tunisians in the Emirates decreased from 26,364 to 22,209, while the number of Tunisian residents in Qatar increased considerably, from 17,750 to 34,156. These data highlight the relevance of carefully examining the dynamics of the evolution of Tunisian migration to these countries, especially for highly qualified individuals.

Migration of Highly Qualified Individuals to the Gulf States

One obstacle encountered in this study is the gap between the classification of professions used in the Tunisian sources, which serve as a basis for our analysis, and the ILO International Classification of Occupations (ISCO / CISCO-08), which is used as the terms of reference of this study.

In an attempt to merge the two categories of sources, we decided to consider as highly qualified only those who have a level equal to or higher than a first-level university degree, in the Tunisia HIMS data. In addition, given that the mission of the ATCT is essentially to place Tunisian senior executives and managers, we consider that all migrant workers placed by this agency belong to the three upper levels of the ISCO classification.

Against this backdrop, we strive to better understand the migration trends and dynamics of highly qualified Tunisians to three destination countries: Saudi Arabia, Qatar and the United Arab Emirates.

Characteristics and Trends

The emigration of highly qualified Tunisians to the Gulf countries began with the establishment of the ATCT in 1972. According to the data from this agency, a few dozen "overseas volunteers" for international cooperation were employed in Saudi Arabia and the United Arab Emirates, 82

Table 4: Proportions of Highly Qualified Tunisians in Tunisian Resident Population, by Country of Destination

	Total population of Tunisians	Population of highly qualified Tunisians	Percentage
Saudi Arabia	14,237	6,616	46.47
UAE	10,420	6,119	58.72
Qatar	14,518	8,655	59.61

Source: INS, Tunisia HIMS (2021)

and 47 people respectively in 1975. For Qatar, only 4 Tunisian executives were employed by Qatari companies in 1979. Today, the numbers and profiles have changed considerably. It is therefore relevant to analyse these developments and the dynamics underlying them.

Before exploring these aspects, it is important to assess the relative share of the highly qualified within the Tunisian population residing in each of the three countries, and the share of women workers among them.

Composition of the population studied

Almost half of the total population of Tunisians residing in each of these countries is highly qualified. As indicated in Table 4, the proportion of highly qualified in resident expatriate populations varies between 46.47% for Saudi Arabia and 59.61% for Qatar, with a fairly similar rate for the UAE (58.72%).

This observation opens up several avenues of interpretation. First, we can mention the targeted nature of the recruitment of Tunisian workers, particularly in Qatar, and to a lesser extent in the UAE and Saudi Arabia. It is also possible that Tunisian emigration, which started earlier in Saudi Arabia than in Qatar, has changed the structure of the Tunisian population residing in this country. Over time, these emigrants may settle down with their families and have children, who, due to their age, are not counted among the highly qualified Tunisian migrants.

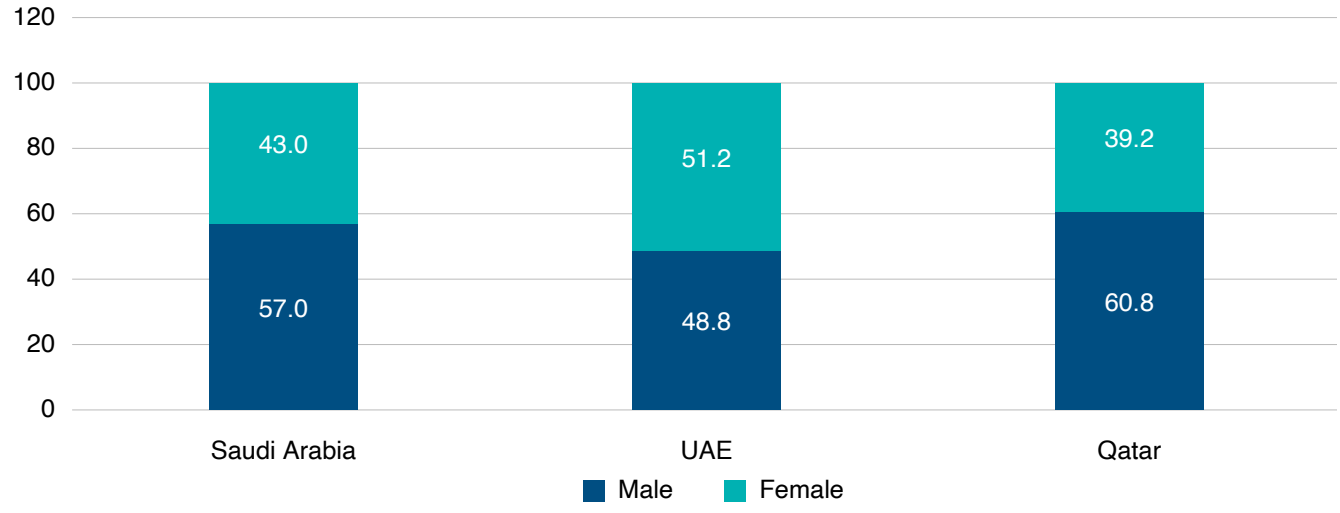
The second notable characteristic of the highly qualified Tunisians residing in the three countries studied concerns the gender dimension. Figure 5 below examines the share of women among the Tunisian nationals holding a university degree living in Qatar, Saudi Arabia and the United Arab Emirates. Although the percentage of women in this highly skilled population is highest in the Emirates, the proportion remains almost balanced in the other countries, reaching 39.2% in Saudi Arabia.

Furthermore, in comparison with other regions of the world (North America: 75.4% men and 24.6% women among the university-educated; Europe: 59.8% men and 40.2% women), the figures for the three Gulf countries underscores the feminisation of the migration of highly qualified Tunisian workers. The most plausible reason for this lies in the nature of the sectors of activity that are in high demand for skilled workers, particularly health and education. These two fields have a significant presence of women in Tunisia, which explains why they may also apply for jobs abroad when the opportunity arises.

Orderly migration, organised by public actors

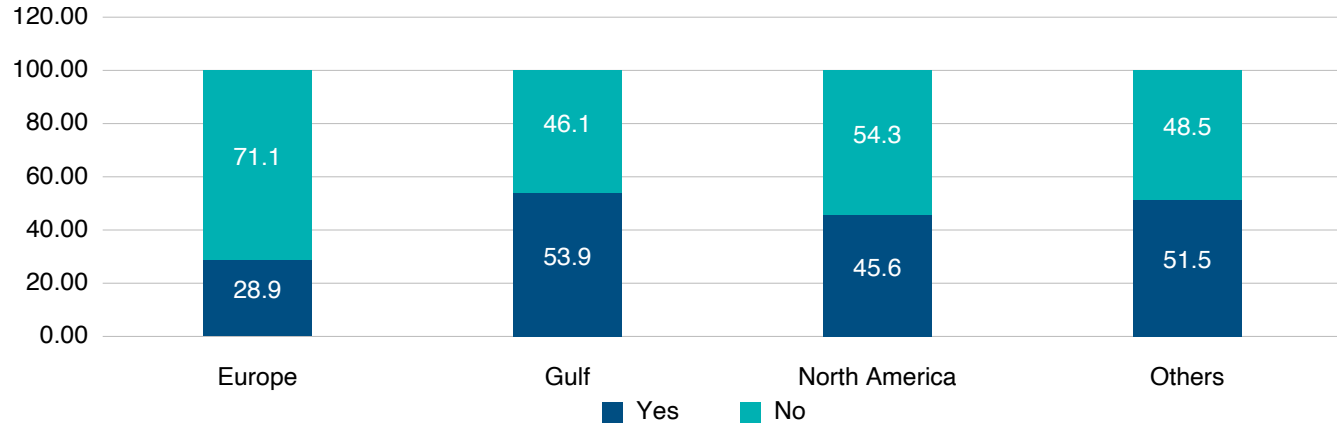
As illustrated in Figure 6 below, data from the Tunisia HIMS survey indicates the formal and orderly nature of the migration of highly qualified Tunisians to the Gulf countries: most of them choose to go through a structured network of brokering actors to find employment in the region. Nearly 54% of Tunisian graduates who opted for the Arab Gulf

Figure 5: Distribution of Current Migrants with Higher Education by Country of Residence and Gender (%)



Source: INS, Tunisia HIMS (2021)

Figure 6: Distribution of Current Migrants with Higher Education by Region of Residence and Use of Migration Intermediation (%)



Source: INS, Tunisia HIMS (2021)

countries confirmed their preference for such a method to look for a job abroad. By contrast, those who chose Europe as a destination tend to favour more informal avenues or personal networks for seeking employment abroad.

It is worth noting that recruitment platforms are also used as a resource to find employment abroad, but information is missing to measure their role.

Gulf migrants' preference for resorting to official placement agencies is confirmed by the results of an earlier study,[9] which highlighted the high prevalence of the use of intermediaries for accessing job opportunities in the Gulf, where recruitment networks play a crucial role.[10] This also echoes the history of Tunisian workers' migration to this region: since its beginnings in the early 1970s, highly skilled migration has been carried out through formal channels.

Table 5: Distribution of Current Migrants with Higher Education Who Have Used Intermediation, by Type of Intermediary

	Current region of residence of the migrant (%)				
Intermediary	**Europe**	**Gulf**	**North America**	**Other**	**Total**
Tunisian Agency for Technical Cooperation	32.1	54.3	47.3	29.5	38.0
An employment agency/employment office of the host country located in Tunisia	20.7	9.1	28.6	11.1	17.5
A private employment office located in Tunisia that recruits for the host country	11.3	23.6	5.2	48.1	19.6
A government agency of the country of abroad operating in Tunisia	19.9	8.0	18.9	7.2	15.1
An unregulated agency (Harrak)	4.8	0.8	0	0	2.6
Others	11.1	4.4	0	4.1	7.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: INS, Tunisia HIMS (2021)

Table 6: Distribution of ATCT Overseas Volunteers for Cooperation, by Country of Residence, Sector of Activity, and Period

Domain/ Country	2011–2015	2016–2019	2020–2023	Domain/ country	2011–2015	2016–2019	2020–2023
Higher Education (%)				**Doctors (%)**			
Saudi Arabia	46	28	15	Saudi Arabia	6	16	11
Qatar	2	2	3	Qatar	1	2	2
UAE	5	6	6	UAE	1	1	2
Secondary and technical education (%)				**Paramedical Personnel (%)**			
Saudi Arabia	14	7	4	Saudi Arabia	5	10	20
Qatar	11	26	26	Qatar	34	31	32
UAE	9	27	24	UAE	3	9	4
Physical Education and sports (%)				**Management and commerce (%)**			
Saudi Arabia	10	9	18	Saudi Arabia	3	4	9
Qatar	10	10	6	Qatar	6	10	10
UAE	27	28	16	UAE	43	33	22
Engineering (%)				**Hospitality and tourism (%)**			
Saudi Arabia	9	4	13	Saudi Arabia	1	1	1
Qatar	5	4	6	Qatar	1	1	0
UAE	5	8	14	UAE	4	2	1

Source: ATCT Statistics (2024)

In this context, the job seeker and the intermediary are mainly connected through public institutions and agencies. It is therefore quite natural that this migration avenue is the most predominant and is supported by private sector actors.

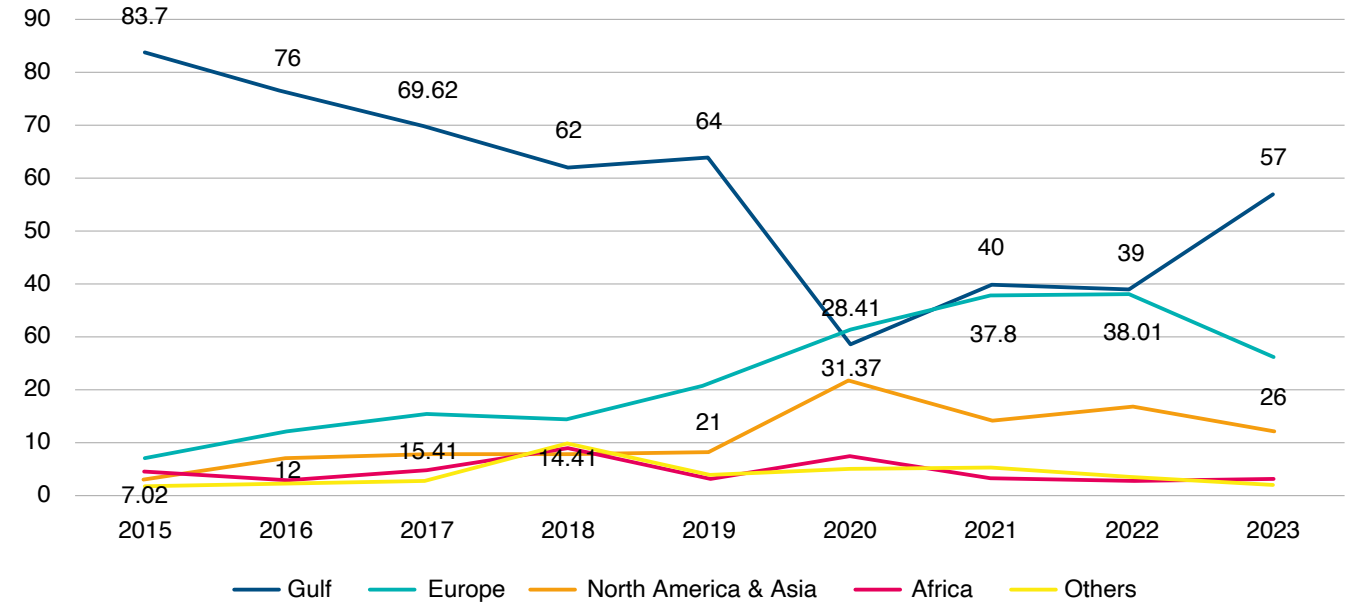
A migration targeting the health and education sectors

The analysis of employment opportunities addressed to ATCT by Gulf states over the past fifteen years highlights the characteristics of highly skilled Tunisians' migration to Saudi Arabia, Qatar, and the United Arab Emirates.

In Saudi Arabia (2011–2015), most positions on offer were for the sector of education. This field absorbed 80% of recruitments, mainly university lecturers, as well as secondary school and physical education teachers. In Qatar, paramedical personnel were in high demand, although the education sector was also prevalent. Between 2019 and 2023 however, trends changed, and interest grew in other fields. The demand for Tunisian university teachers went down between 2020 and 2023 in Saudi Arabia, falling to 15% of all recruitments. However, the demand for paramedical personnel and engineers increased considerably, suggesting an expansion of the outlets for Tunisian skills, in response to the economic transition process in the Kingdom, and as a consequence of the COVID-19 crisis.

In the UAE, specialists in trade and management were the most sought-after (43% of all offers), followed by other educational sector positions. In Qatar, demand remained stable over time, with a consistent preference for paramedical staff. Notably, Tunisian skills in the tourism sector appear to be overlooked by Gulf recruiters, representing less than 4% of placements, which could be explained by a perceived lack of attractiveness or Tunisian professionals' preference for more prestigious touristic destinations, such as Mediterranean Europe.

Figure 7: Evolution of the Percentages of ATCT Placements by Major Regions (Outflows)



Source: ATCT Statistics (2024)

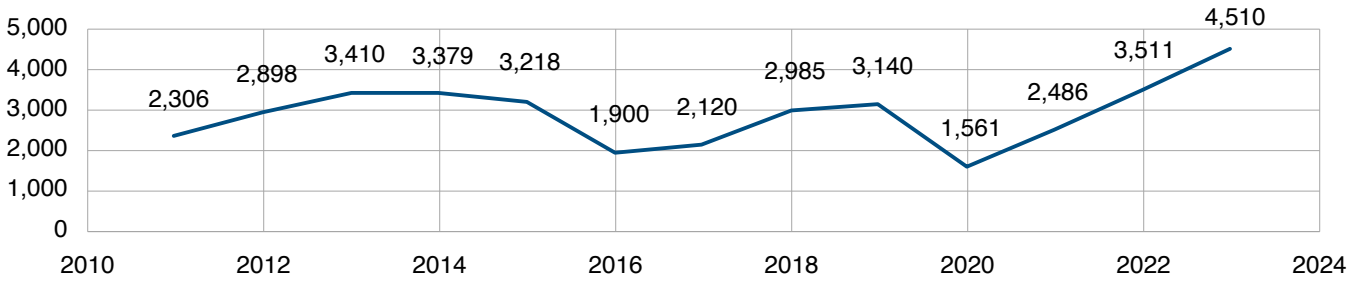
A migration with perplexing trends

To assess the relevance of this conclusion, we now compare the relative shares of the placements of highly qualified workers carried out by the ATCT by region of destination.

The analysis of ATCT's annual placement rates of highly skilled Tunisian workers reveals a marked decline in the share of workers choosing opportunities in the Arab Gulf countries, where placements fell from 83.7% in 2015 to 39% in 2022. This rate is now similar to that of European countries, which have seen a significant increase in demand for Tunisian skills since 2018. In 2022, only 7.02% of candidates were placed in the Gulf countries. Although placement rates in North America and Asia have been on a steady path, they were impacted by the COVID-19 pandemic in 2020. In contrast, the Gulf countries have started to revive their demands, reaching 57% of placements in 2023.

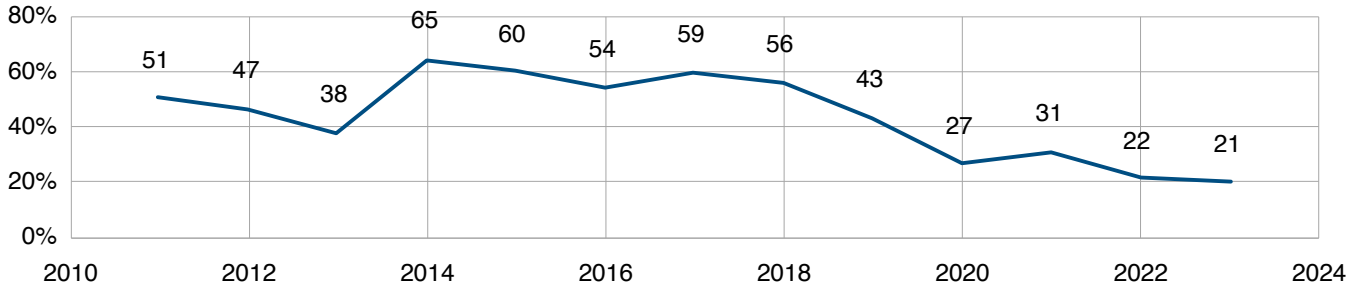
According to ATCT reports,[11] the position of the Arab Gulf countries as outlets for Tunisian professionals has weakened compared to that of European countries. Only two Arab countries stand among the top five destinations for Tunisian highly skilled professionals in 2022. This may be due to an increased international competition, particularly in sectors privileged by European and North American recruiters, such as health, higher education, and ICT. The ability of the Arab Gulf countries to react to this situation remains uncertain, as shown in Figures 8 and 9.

Figure 8: Evolution of ATCT Placements Between 2011 and 2023 (All Destinations)



Source: ATCT Statistics (2024)

Figure 9: Evolution of the Share of Saudi Arabia, Qatar, and the UAE in the Total ATCT Placements Between 2011 and 2023 (%)



Source: ATCT Statistics (2024)

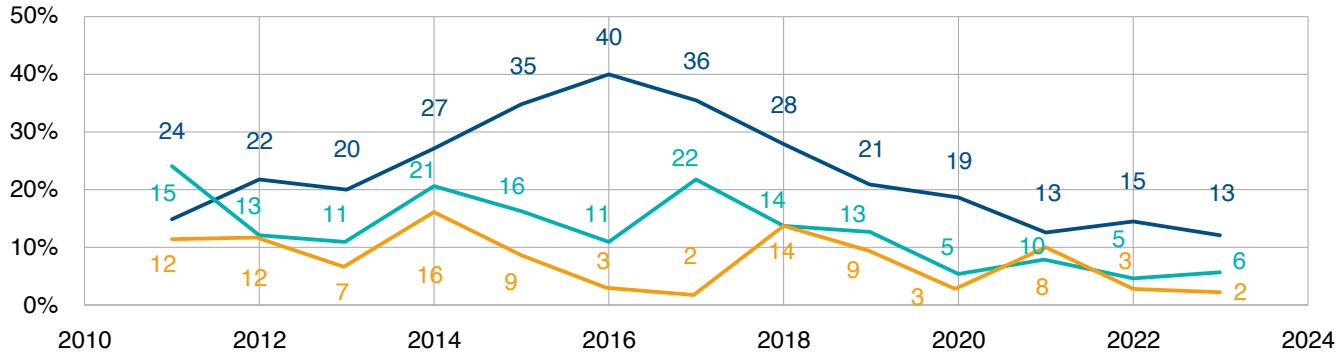
Figure 8 clearly illustrates the increase in the total numbers of placements of Tunisian skills carried out by the ATCT, in particular since 2021, after the drop recorded the previous year due to COVID-19. For its part, Figure 9 indicates the relative decrease in the share of recruitment destined to Gulf Arab states, with cumulative flows' figures only making up 21% of all placements, compared to 65% in 2014. While the ATCT is experiencing an increase in its activity, the Arab Gulf countries, traditionally considered guaranteed labour markets, are losing in importance for highly qualified Tunisian migrants.

We will now examine each of the three countries studied specifically and observe the evolution of their share of recruitments of Tunisian skills placed by the ATCT. Saudi Arabia as a destination gains in prominence between 2011 and 2016, peaking at 40% of all placements that year. However, since that date, a continuous downward trend has been recorded, stabilising around 13% of all placements by ATCT during 2023. The specialised literature mentions the fall in the price of oil in 2016, which could explain this decline.

As for Qatar, after a period of fluctuations between 2011 and 2017, the figures show a continuous decline, now settling at around 6%. Finally, for the United Arab Emirates, the trend is very similar to that of Qatar, with a slight difference in rates. The only notable exception concerns the year 2017, when Qatar hosted 22% of the Tunisian skills placed by the ATCT, while the Emirates received only 2%.

Analysis of ATCT data on the placement of highly skilled migrants to three specific countries highlights significant trends over the period 2011–2023. After peaking at 65% in 2014, the placement rate has gradually declined, falling to just 21% in 2023. This decline could indicate a reduction in demand for Tunisian skills in these Gulf countries, a trend possibly exacerbated by the COVID-19 pandemic, which

Figure 10: Evolution of Each Country's Share in Total ATCT Placement Between 2011 and 2023 (%)



Source: ATCT Statistics (2024)

caused the share of recruitments to the GCC to drop to 27% of the total in 2020.

While the period between 2015 and 2018 showed some stability, with rates fluctuating between 54% and 60%, recent figures suggest a worrying downward trend. This could reflect increased competition from other destinations or changes in the migration policies of Gulf countries.

It is important to note, however, that despite this decrease in the placement rate to the Gulf countries, the total number of placements made by the ATCT has increased considerably.

To fully understand the migratory dynamics of Tunisian skills to these three countries, it would be relevant to explore the motivations underlying these movements, as well as of those who aspire to migrate.

Motives for Tunisian Emigration to the Gulf Countries: A Look at the Past and the Future

It is often assumed that the analysis of the motivations for emigration is carried out in retrospect, that is, after the migrant has achieved his or her migration project. However, this approach could be enriched by a proactive analysis of the reasons given by highly skilled Tunisians planning to migrate to any destination. Using this dual lens would correct the bias of the influence of post-migration factors cited a-posteriori by migrants to explain their decision to migrate, and obscure pre-migration motivations.

Job search: a constant motivation for migrants

As mentioned above, the reasons that push Tunisian emigrants to leave their country to settle elsewhere reveal that, for highly qualified individuals, the economic component plays a predominant role. Data from the Tunisia HIMS survey confirm that, in most cases, the search for employment constitutes a key motivation for those considering a migration experience.

As shown in Table 6, professional motivations are observable among all groups of highly qualified migrants, particularly for those who have chosen the Arab Gulf countries as their destination. These migrants represent 53.7% of the entire population, compared to 38.3% for those from North America and 26.0% for Europe. This finding is consistent with the idea widely shared among Tunisians, who perceive this region of the world as a privileged place to work. Attractive salaries, cultural proximity (language and religion), and favourable working conditions contribute to this perception.

Furthermore, by focusing more specifically on the three countries studied, we can observe scores slightly differing from those previously presented.

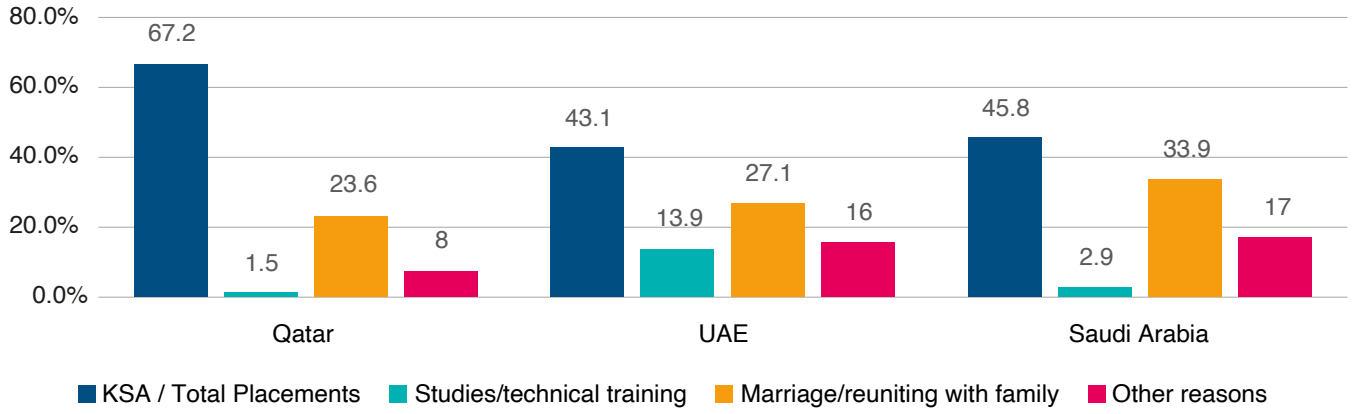
Economic motivation, and more specifically professional motivation, stands particularly high among skilled Tunisians residing in Qatar (67.2%). Employment remains the main motivation, although less intensively for those residing in Saudi Arabia (45.8%) and in the United Arab Emirates (43.1%). This can be explained by the regulatory framework specific to each country regarding family reunion, which varies in terms of restrictions. In addition, bulk recruitment

Table 7: Motivations of Tunisian Skills Migrating by Region of Destination (%)

	Europe	Gulf	North America	Other	Total
Search of employment	26.0	53.7	38.3	51.7	32.5
Improved income and working conditions	8.2	10.9	18.7	14.6	10.0
Cost of living	2.0	1.3	3.5	0.7	1.9
Studies/technical training	31.1	5.4	30.4	9.8	26.2
Marriage/reuniting with family	31.7	27.8	7.2	21.3	28.2
Other reasons	1.1	0.9	1.9	2.0	1.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: INS, Tunisia HIMS (2021)

Figure 11: Distribution of Migrants with Higher Education by Country of Residence and Reason for Migration (%)



Source: INS, Tunisia HIMS (2021)

operations often favour granting visas for professional reasons rather than for studies or family reunification.

However, while acknowledging that these three countries are a popular destination for skilled Tunisians for professional reasons, what about those who plan to migrate there?

Intentions of skilled Tunisians to emigrate to the Gulf countries: An analysis of motivations

The analysis of the migration intentions of Tunisian graduates reveals varied motivations according to regions and countries, based on the results of the Tunisia-HIMS survey. Job search is the main driver, accounting for around 20–22% of motivations to leave Tunisia, reflecting the limited prospects offered by the Tunisian labour market. Social reasons, such as the search for stability and certain freedoms, reach up to 25% in some destinations.

For the Gulf, the "desire to travel" is particularly high (18%), while family-related motivations are less prevalent. Regarding the three specific destinations, 62% of intentions towards Saudi Arabia are motivated by the aspiration for a better standard of living, while Qatar attracts migrants for job opportunities (30%) and social reasons (26%). The Emirates stand out for a strong "desire to travel" (55%), indicating the cosmopolitan appeal of the UAE.

In conclusion, although economic motivations remain central, social factors and aspirations for an improved standard of living also influence the migration intentions of Tunisian graduates.

Perceptions and Effects of Migration of Highly Skilled Tunisians

The discourse on migratory intentions and motivations leads us to investigate the perceptions that the migrants have of their migratory experience, as well as those of the other actors involved, and the outcomes of this experience both at the individual and national levels.

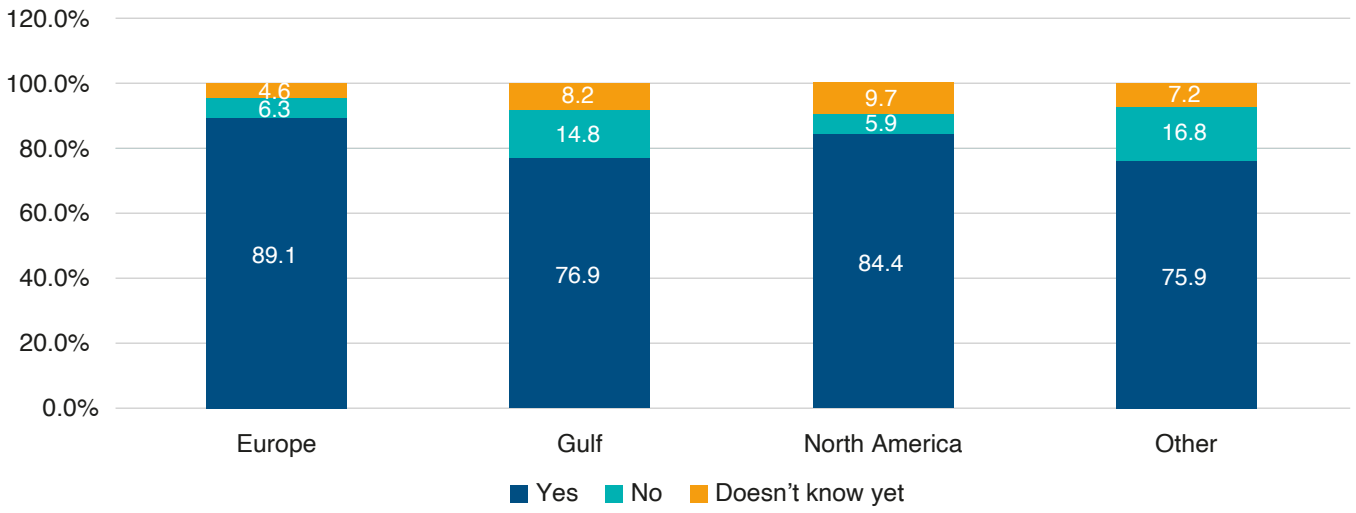
Perceptions

The migration of skilled Tunisians generates mixed feelings, and spurs concerns as much as perceptions of migration as an opportunity. On the one hand, skilled emigration from Tunisia is perceived as a threat to essential sectors such as health, education, and engineering. The shortage of essential professionals such as doctors and nurses is aggravated by their emigration to destinations with better working conditions, which raises concerns about the quality of care in Tunisia.

On the other hand, emigration can bring benefits, including skills transfers and remittances, which support the local economy. However, the "brain drain" related to the loss of talent needed for the country's development, is a cause of frustration among citizens, which supersedes the positive perceptions of emigration's impacts domestically.

The debates highlight the need for a national strategy to promote skills and provide prospects for the country's development. The analysis proposes to explore perceptions

Figure 12: Evolution of the Intention to Stay in the Region of Destination for Migrants with a Higher Level of Education (%)



Source: INS, Tunisia HIMS (2021)

of migration to the Gulf countries by focusing on the intentions of highly skilled migrants, regarding their stay or return to Tunisia, as well as the factors influencing their experiences, to better understand their aspirations and the existence, or not, of conditions favourable to their long-term settlement.

Highly skilled migrants' intentions to stay in destination regions differs markedly across regions. In the Gulf countries (Saudi Arabia, Qatar, United Arab Emirates), 76.9% of migrants intend to stay, although this figure is lower than in Europe (89.1%), indicating some uncertainty about their long-term future in the Gulf.

In addition, 14.8% of migrants in the Gulf plan to leave their host country, a higher rate than in Europe (6.3%), which could be attributed to the working conditions and workers' rights in this region. In comparison, North America has a settlement intention rate of 84.4%, suggesting that migrants perceive this region as offering more stability and opportunities in the long term.

Analysis of the reasons that encourage highly skilled migrants to stay in their country of residence, particularly in the Gulf countries (Saudi Arabia, Qatar, and the United Arab Emirates), highlights key trends. Among those who wish to stay, 59% cite a good job and a decent income as their main

Table 8: Distribution of Migrants with a Higher Level of Education Wanting to Stay in Their Host Country by Reason for Wanting to Stay (%)

Reason	Europe	Gulf	North America	Other	Total
Quality of life	67	64	81	57	65
Projects and goals	19	24	13	22	20
Difficulty in finding adequate employment in Tunisia	6	12	4	18	7
Other	1	0	1	5	1
Total	**100**	**100**	**100**	**100**	**100**

Source: INS, Tunisia HIMS (2021)

Table 9: Distribution of Migrants with a Higher Level of Education by Type of Discrimination and by Region

Type of discrimination	Europe (%)	Gulf (%)	North America (%)	Other (%)
Treated with less respect	4.7	10.9	1.1	4.8
Criticised for their accent or language level	4.4	8.5	1.3	5.9
Behaving fearfully toward migrants	4.7	3.2	-	2.6
Sense of superiority over migrants	6.2	12.3	0.9	10.6
Threats or harassment	3.5	1.4	0.2	1.0
Negative comments based on skin colour, race, or country of origin	4.2	2.3	2.2	0.6
Negative comments about religion or beliefs	11.3	5.0	3.5	2.7

Source: INS, Tunisia HIMS (2021)

motivations, a figure comparable to Europe (53%) but lower than North America (72%).

In addition, 22% of migrants in the Gulf cite their spouse's wish to stay, indicating that migration decisions are often influenced by family considerations. In contrast, only 2% cite the quality of the education system as a reason for their stay, far from the 9% observed in North America.

Finally, 12% of migrants from the Gulf express concerns about the difficulty of finding adequate employment in Tunisia, reflecting the perception of better economic opportunities abroad.

By contrast, not wanting to stay in Gulf states may be due to negative experiences in the region. In terms of these, migrants list several specific issues that may encourage them to return to their country of origin. The table above categorises these reasons that may discourage migrants from seeking long-term stays in the host country.

Around 10.9% of migrants in the Gulf countries report being treated with less respect, a figure higher than in Europe (4.7%) and North America (1.1%), indicating specific social integration challenges. Furthermore, 8.5% of Gulf migrants have experienced criticism related to their accent or way of speaking, compared to 4.4% in Europe and 1.3% in North America, highlighting a heightened sensitivity to linguistic differences.

Regarding the perception of hostile or superior behaviour, 12.3% of migrants in the Gulf experience this type of treatment, compared to 6.2% in Europe and 0.9% in North America. Threats and harassment are less frequent in the Gulf (1.4%) than in Europe (3.5%), and very rare in North America (0.2%). Negative comments about skin colour or race are also less common in the Gulf (2.3%) than in Europe (4.2%), while negative remarks about religion or beliefs are more common in Europe (11.3%) than in the Gulf (5%) and North America (3.5%).

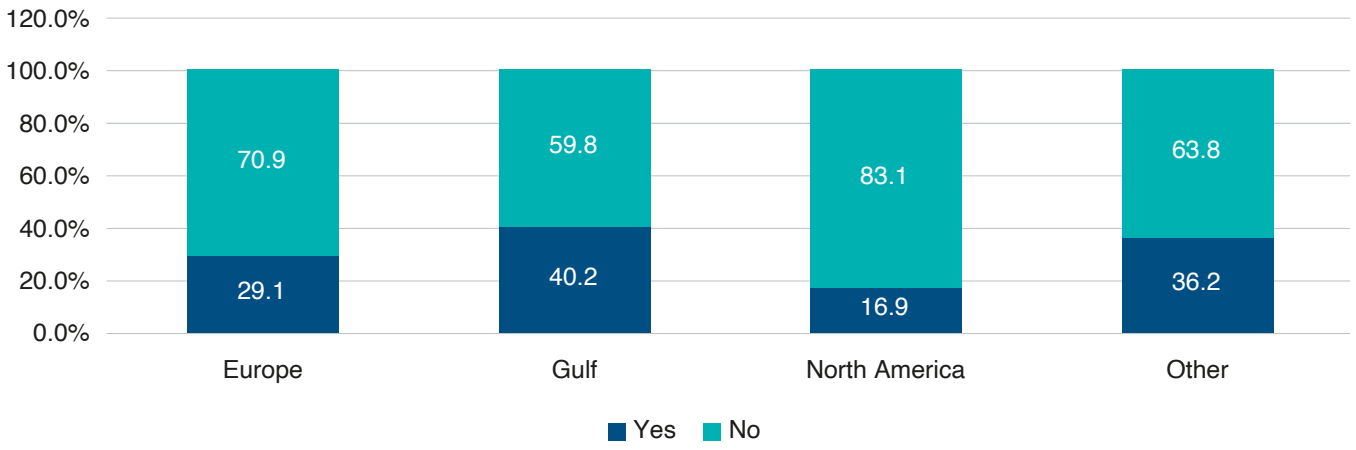
The Outcomes of Tunisian Migration

This section explores the outcomes of Tunisian migration, with a focus on remittances and investments made by migrants. In addition to their socio-cultural impact, these transfers play a crucial role in the country's economic stabilisation, now surpassing revenues generated by tourism and foreign direct investment. Remittances provide financial support to families, maintain purchasing power in times of inflation, and help stabilise foreign exchange reserves.

Indeed, remittances represent a key source of income for many Tunisian families. In recent years, these revenues have grown significantly, becoming a vital component of foreign exchange for the national economy. In 2023, remittances reached approximately $2.7 billion, or about 6.6% of GDP. This trend continued in 2024, with a 3.5% increase in transfers during the first half of the year, totalling 3.055 billion dinars (about $985 million) through June 10.

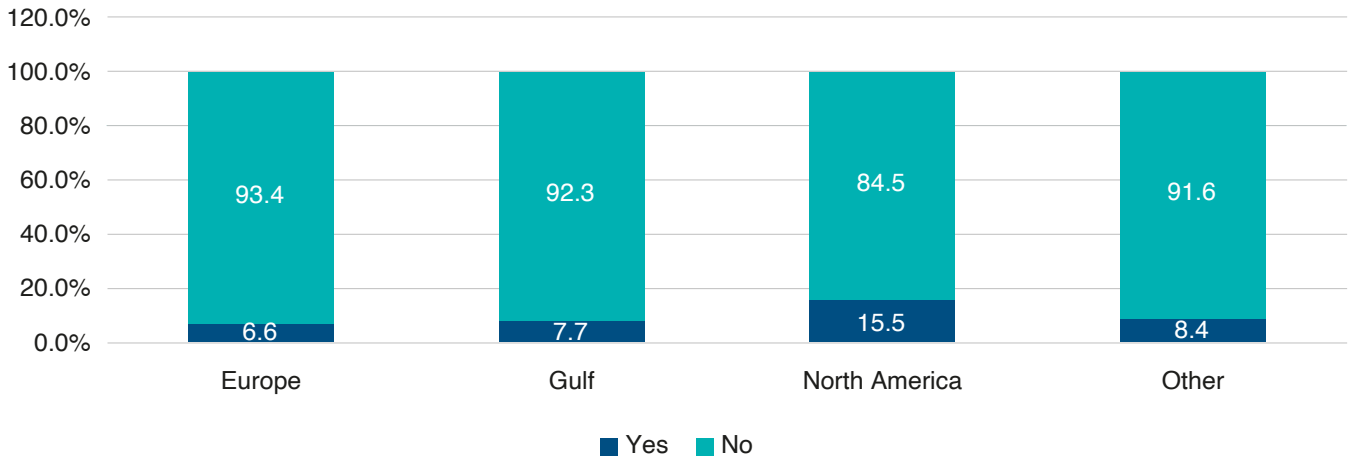
These financial remittances not only strengthen the economic stability of households, but can also be reinvested in

Figure 13: Distribution of Current Migrants with Higher Education by Region and Whether They Transferred Funds to Tunisia in the 12 Months Preceding the Pandemic (%)



Source: INS, Tunisia HIMS (2021)

Figure 14: Distribution of Current Migrants with a Higher Level of Education by Region and According to Whether They Have Carried Out Investment Projects in Tunisia (%)



Source: INS, Tunisia HIMS (2021)

local projects, thereby stimulating the country's economic growth.

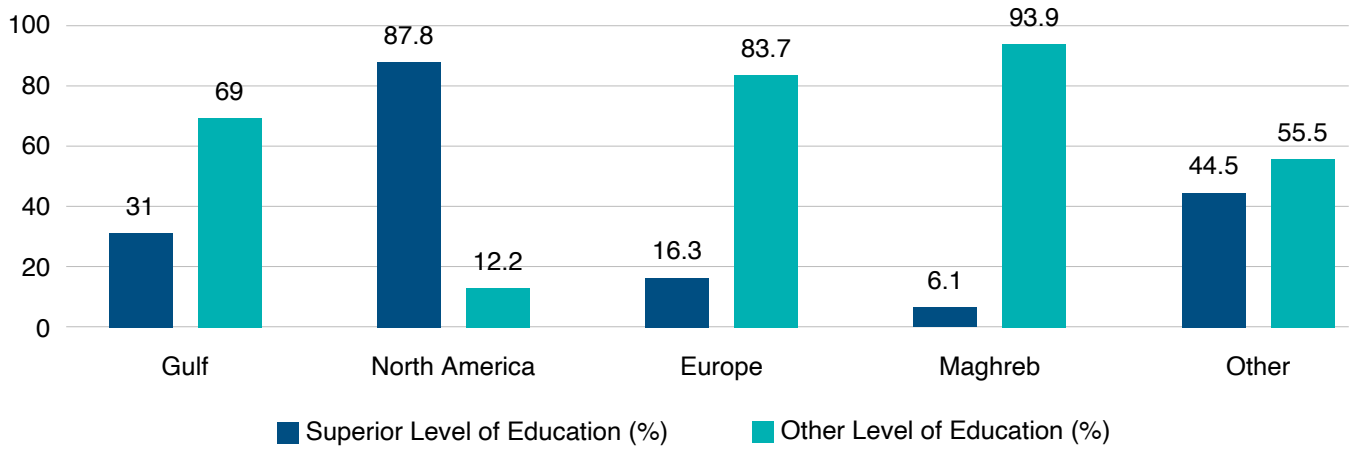
Investments by returning migrants also constitute an important lever for local development, promoting the transfer of capital and skills.

Analysis of remittances by highly skilled migrants reveals significant differences across regions of residence. Prior to the COVID-19 pandemic, approximately 40.2% of migrants living in the Gulf reported sending remittances to family or others, a relatively high percentage compared to migrants in North America, where only 16.9% reported sending remittances.

In contrast, a majority of 68.6% of migrants in Europe did not send remittances; a rate that remains significantly higher than that observed in the Gulf, where 57.4% of migrants did not send remittances. These data suggest that migrants living in the Gulf are more likely to financially support their families back in Tunisia. This trend can be attributed to the often-temporary nature of their stay in these countries, as well as the pressure felt to maintain strong family ties.

Regarding investments made in Tunisia, only 7.7% of migrants living in the Gulf countries report having committed funds, which is slightly higher than that observed in Europe (6.6%), but much lower than in North America

Figure 15: Distribution of Returning Migrants by Level of Education and Implementation of Investment Projects in Tunisia



Source: INS, Tunisia HIMS (2021)

(15.5%). This indicates that migrants in the Gulf are less inclined to invest in their country of origin compared to their counterparts in North America.

Investments by returning migrants are crucial for Tunisia's economic and social development, especially with increasing emigration. These migrants contribute through financial resources, skills and networks,[12] stimulating job creation and local innovation.

An analysis of investments by educational level shows significant disparities: 31% of investors from the Gulf countries are highly educated, compared to 87.8% in North America and only 16.3% in Europe. In the Maghreb region, 93.9% of investors have a lower level of education.

Finally, regarding the impact of the year of return on investment projects, those who returned between 1970 and 1989 have low success rates due to an unfavourable economic context. In contrast, migrants who returned between 1990 and 2005 show higher success rates, while those who returned after 2011 face economic challenges and a complex political transition.

Policy Responses and Their Limitations

For over sixty years, emigration has served as a political lever for Tunisian governments in their fight against unemployment, given the economy's inability to integrate all young graduates and women into the domestic work force. However, Tunisia still does not have an explicit migration strategy, a paradox given the many institutional, legal, and international cooperation initiatives put in place. Although three versions of national migration strategies were proposed in 2012, 2015, and 2018, none have been validated by the government. More recently, a draft national international placement strategy (2022) also remains unimplemented. This lack of clarity in migration policy suggests hesitation and instability, particularly with regard to the emigration of highly qualified people to destinations such as the Gulf countries, evident in public debate, institutional practices, and strategic vision (or lack thereof).

A Blurred Vision and Disorderly Institutions

An analysis of journalism, media broadcasts and open opinions of various social actors indicates that Tunisia does not have a clear vision regarding the migration of skilled individuals, which often leads to what is referred to as "brain drain." Several crucial questions remain unanswered, such as how to retain this qualified population and how to promote their placements abroad while securing the performance of institutional duties and provision of essential services to the population.

The creation of a ministerial council dedicated to the issue of migration, without the implementation of concrete measures, the ignorance of the reports produced by the Tunisian Institute of Strategic Studies on the topic are examples illustrating a strategic deficit in the matter

of migration. Although the concerned ministries show an interest in the issue, few significant initiatives have been undertaken. In the summer of 2024, the Ministry of Foreign Affairs organised a forum on Tunisian skills abroad, involving ministers and diaspora associations, such as the Association of Tunisians of Grandes Écoles (ATUGE). Although these events have initiated a dialogue on skills' emigration, there remains an urgent need for concrete mechanisms to support these discussions.

Alarmist Narratives and Support Practices

The public debate on this issue is equally alarmist. All media outlets (radio, press, television, social networks, etc.), convey views and analyses by various political, social, and economic actors on the topic of highly skilled migration. Three major conclusions can be drawn from these discourses: i) emotions-driven assessment of the issue, ii) attempts at finding scapegoats to blame, iii) a lack of a clear roadmap.

The emotionality of the discourses is manifested by confusions in terminology (brain drain, exodus of skills, migration of skills) that depict skilled emigration as an imminent threat, often without solid foundation; a few unverified figures are occasionally cited.

The scapegoating of external actors (the government, the media, foreign forces, etc.) creates a negative dynamic whereby everyone is involved but no one really takes responsibility.

This approach is detrimental to the development of a clear strategy to resolve the issue of skills migration. However, it is crucial to note that not all actors adopt this vision. Some, especially those involved in international placement, see the issue as an economic and social opportunity, while also perceiving it as a risk due to the lack of balanced mechanisms in the labour market.

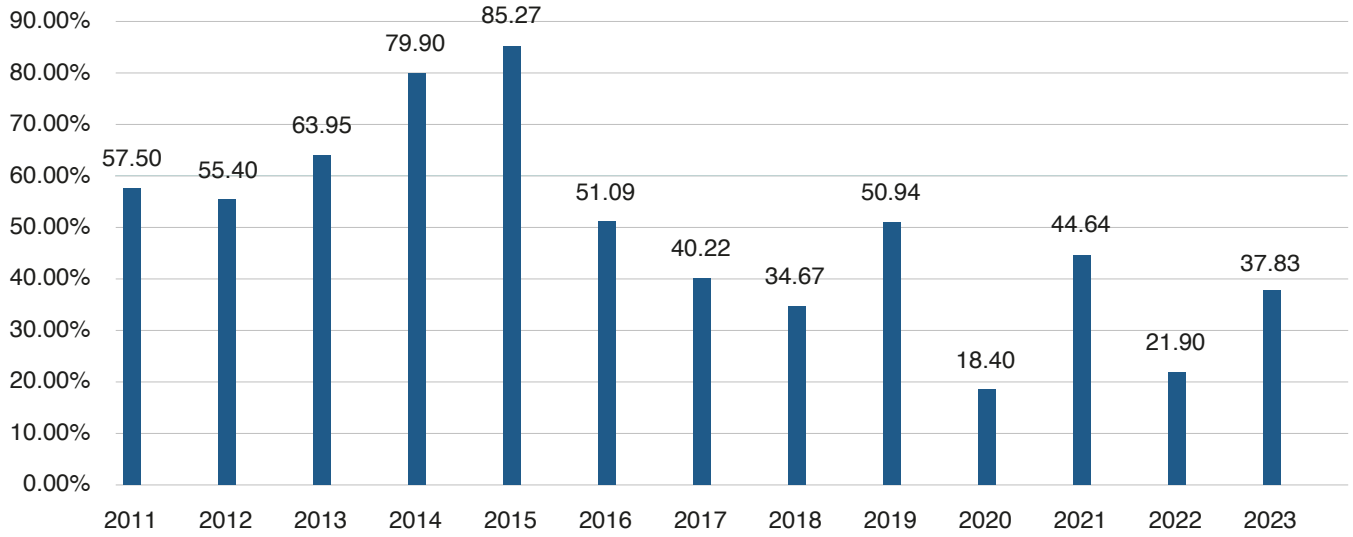
Placements Agencies' Inability to Meet the Increase in Demand for Labour

We previously discussed the decline in the placement rate of Tunisian skills in the three Gulf countries. This situation could be due to several factors, including a saturation of the labour market in this region, increased competition from other receiving countries, or a decrease in motivation to emigrate.

These hypotheses require a more in-depth analysis, which the currently available data do not allow. However, an analysis of ATCT data on the rate of vacancies from the three Gulf countries filled by Tunisian workers provides some insight into this issue.

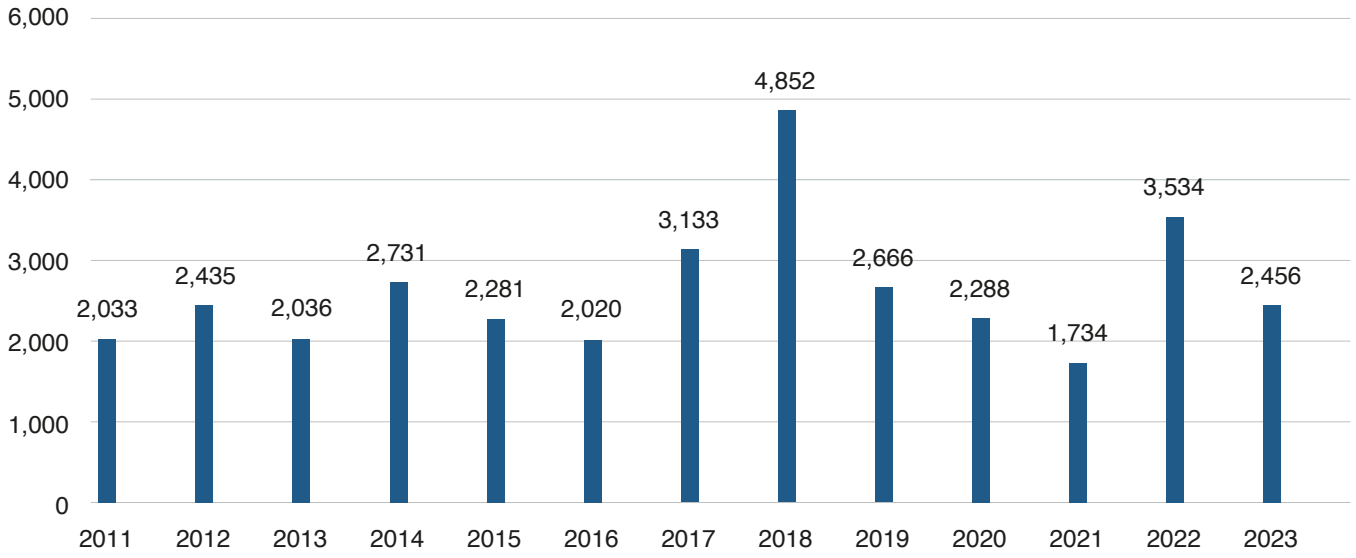
The graph above highlights ATCT's difficulties to supply enough Tunisian candidates to take on job offers from

Figure 16: Evolution of ATCT Vacancies' Filling Rates for the Three Gulf Countries (%)



Source: ATCT Statistics (2024)

Figure 17: Evolution of Job Offers Received by ATCT from Its Qatari, Saudi, and Emirati Partners



Source: ATCT Statistics 2024

Qatari, Emirati and Saudi partners. Indeed, from 2012–2015, notable efforts were made to improve the level of filling of vacancies, yet a significant decline has been observed since 2016. Although the recovery in 2023 indicates a slight improvement, it does not mask the agency's inability to meet the needs of job applicants.

By examining the job offers received by ATCT from the three countries concerned, a distinct trend concerning the satisfaction rate appears (see Figure 17). It is thus possible that ATCT is striving to improve its performance. However, due to the potential insufficient availability of skills on the Tunisian market or a lack of attractiveness of these skills to work in the Gulf countries, the agency's filling rates remain relatively modest.

Conclusions and Recommendations

In light of what has been presented, the conclusions drawn are summarised as follows:

- The migration of highly qualified people to the Gulf countries began in the 1970s through formal channels and structured placement. According to ATCT administrative sources, this migration has evolved both in terms of numbers and profiles, with an increasingly notable female presence.
- The reasons underlying Tunisian migration are mainly professional, although aspirations leading to migration have evolved, particularly for those who choose Qatar as their country of settlement.
- The emigration of skilled Tunisians to the Gulf countries remains concentrated in traditional sectors such as education and health, particularly in Saudi Arabia. However, other tertiary sectors, such as information technology and business management are also experiencing growing demand, especially in the United Arab Emirates.
- The Gulf countries markets continue to attract skilled Tunisians but is experiencing the beginning of a competitive trend from other destinations (Western Europe and North America) to which this population is increasingly attracted.
- Perceptions regarding highly skilled migration from Tunisia are characterised by ambivalence: on the one hand, it is perceived as beneficial (i. e., remittances for the economy), but on the other hand, it raises concerns related to the risks of instability associated with brain-drain.
- Despite the intensity of discourse and writings on the subject, policymakers display little ability to respond to the concerns raised and to take into account the importance of this migration for the Tunisian economy. This

political hesitation impacts the functioning of public and private institutions in charge of placement, aggravated by the negative perception of highly skilled migration in public opinion.

In view of these analyses, the following recommendations are put forth:

- Need for a strategic response from Tunisian policymakers to develop informed policies in line with the national and international context, in the areas of employment, training, education, health, etc., taking into account the multidimensionality of labour migration.

- Strengthening international cooperation with the Gulf countries is a crucial issue to secure employment opportunities and guarantee the rights of Tunisian workers, thus facilitating their integration into Gulf societies.

- Incentives to material and immaterial transfers generated by migrant skills, especially investment; improvement of information on existing mechanisms. Promoting avenues for strengthening ties between Tunisia and highly skilled emigrants is also of prime importance.

- Promote a multi-stakeholder dialogue in order to provide appropriate responses to the phenomenon. Find ways to alleviate tensions and negative perceptions of highly skilled emigration observed in the public sphere; encourage relevant stakeholders to engage concretely in addressing the phenomenon, its causes and consequences.

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Endnotes

1 Figure calculated based on data from the Ministry of Foreign Affairs, Migration and Tunisians Abroad which counts this population at 1,731,619 in 2021, and those estimated by the United Nations Department of Economic and Social Affairs which estimates in 2024, Tunisian population at 12,291,550.

2 See the Tunisia Hims report on this subject (2021).

3 According to the country's National Institute of Statistics (INS), the unemployment rate increased from 15.1% to 18% between the first and second half of 2020. After the peak recorded in 2020, the unemployment rate registered a decline while remaining high, hovering around 15% in 2022 (16.2% at the end of 2023). The unemployment rate for higher education graduates is estimated at 23.2% (12.3% for boys and 33% for girls) in the fourth quarter of 2023 (https://www.ins. tn/statistics/153).

4 On this topic, see the list of agencies approved by the ministry and those whose authorizations have been withdrawn: http://www.emploi.gov.tn/sites/default/files/inline-files/LISTE1_0.pdf.

5 Memorandum of Understanding on a strategic and comprehensive partnership between the European Union and Tunisia, see https://ec.europa.eu/commission/presscorner/detail/pt/ip_23_3887.

6 https://gulfmigration.grc.net/qatar-tunisia-agreement-regulating-the-employment-of-tunisian-workers-in-the-state-of-qatar/. It is worth mentioning the absence of an official document available to the general public tracing the cooperation on labor migration between Tunisia and the GCC countries.

7 https://en.ammonnews.net/article/61448.

8 The 2021 "Tunisia-HIMS" survey defines as a current migrant (or emigrant) any person of Tunisian nationality, aged 15 or over, having resided in Tunisia and currently residing in another country for a period of at least three months. For more details on the methodological aspects of this survey, we recommend consulting the restitution report of the main results (pages 73 and 74) available on the link: https://www.ins.tn/publication/rapport-de-lenquete-nationale-sur-la-migration-internationale-tunisia-hims.

9 International Labour Organization, "Exploratory study on the placement opportunities of Tunisian workers in the Gulf countries (Saudi Arabia, Bahrain and Qatar) | International Labour Organization," August 13, 2023, https://www.ilo.org/en/publications/exploratory-study-on-the-placement-opportunities-of-worker.

10 Bazzi et al. 2021; Jones and Sha 2020.

11 ATCT annual reports 2016–2023 available online at https://www.atct.tn/fr/rapports-dactivites-de-latct

12 "Role of Highly Skilled Migrants in the Process of Inter-Firm Knowledge Transfer across Borders," Journal of World Business 50, no. 1 (January 1, 2015): 56–68, https://doi.org/10.1016/j.jwb.2014.01.006; Katrin Klein-Hitpaß, "Return Migrants as Knowledge Brokers and Institutional Innovators: New Theoretical Conceptualizations and the Example of Poland," in Return Migration and Regional Development in Europe: Mobility Against the Stream, ed. Robert Nadler et al. (London: Palgrave Macmillan UK, 2016), 55–81, https://doi.org/10.1057/978-1-137-57509-8_3.

4

Trends, Dynamics and Policies regarding Highly Skilled Migration from Egypt to Saudi Arabia, Qatar and the UAE

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Abstract

This report explores the dynamics of highly skilled migration from Egypt to the GCC, emphasising drivers, policy frameworks, and socio-economic impacts. The study highlights the evolving labour demands in the GCC, driven by diversification initiatives which target knowledge-based economic growth. Egypt's surplus of educated professionals and low wages position it as a key talent source for the GCC, particularly in sectors like healthcare, education, and engineering.

The analysis identifies critical push factors, including Egypt's high unemployment and skill mismatches, and pull factors such as the GCC's higher wages and tax-free environments. Gender dynamics, although underexplored, reveal rising female migration to sectors like healthcare.

The report advocates for comprehensive bilateral agreements addressing social protection, portability of benefits, and gender sensitivity. Ultimately, the study highlights the potential for a "triple win" scenario through strategic, evidence-based policy frameworks that balance economic development with the rights and aspirations of highly skilled workers.

Introduction

Migration trends in the GCC[1] have evolved significantly over the past decades, transitioning from a reliance on low-skilled labour to a targeted effort to attract highly skilled migrants particularly from countries like Egypt (Fargues & Shah, 2018). The economic diversification plans of the GCC following the 1973 "oil boom" aiming to reduce reliance on oil revenues and build knowledge-based economies in sectors like technology, healthcare, finance, and education (Karoly, 2010), led to a rapid increase in demand for foreign labour, as the national workforces were insufficient and lacked the required skills to execute these projects (Ramadan, 2015).

The rising demand for highly skilled labour, combined with Egypt's large pool of educated professionals and relatively low wages, positions it as a critical source of talent for the GCC. This study examines the drivers, policy frameworks, and socio-economic impacts of this migration flow, highlighting the potential for a "triple win":

1. Egypt benefits by easing domestic unemployment and generating remittances
2. GCC countries address skill shortages critical to their economic diversification agendas
3. Migrants gain enhanced career opportunities and improved quality of life.

This report analyses migration from Egypt to the GCC, exploring the underlying drivers, evaluating policy frameworks, and assessing socio-economic impacts for origin and destination countries. Recommendations aim to align migration trends with sustainable policy frameworks, maximising benefits for all stakeholders.

Background and Context

The GCC stands among the largest recipients of migrants globally (ILO, 2021).[2] The 1970s oil boom spurred demand for low-skilled workers, particularly from neighboring Arab countries (Arnold & Shah, 1984), creating a segmented labour market where expatriates filled most private-sector roles, while nationals gravitated toward higher-paying public-sector jobs with job security, social status, and generous social benefits (Shayah and Sun, 2019).

As public-sector employment reached capacity, GCC governments faced pressure to diversify employment opportunities and transition to knowledge-based economies (Mirzoev, 2020). Nationalisation policies were introduced to increase private-sector participation among nationals while retaining skilled expatriates to meet sectoral demands. Although effective in securing a flexible and cost-effective labour supply, the Kafala system presented challenges to inclusivity, including limited social protection and restricted labour mobility (Toh and DeNisi, 2005).

Recent reforms to residence and labour rights reflect a strategic pivot to attracting highly skilled talents (Wagle, 2024). Initially concentrated in education and healthcare, the demand for skilled professionals has now expanded into finance, IT, and customer service sectors (Abdulaziz et al., 2023). These policy initiatives highlight the GCC's efforts to

align labour market policies with economic diversification goals, ensuring long-term growth and competitiveness.

Historical Context of Labour Market Policies in the GCC

Migration patterns to the GCC from Egypt and other Arab countries initially focused on low- and semi-skilled labour to support infrastructure projects during oil boom (Valenta and Jakobsen, 2016). Before the 1973 war, the Arab share of expatriate labour in the Gulf countries was 84%, mainly from Egypt, Syria and Palestinian Territories, falling to 65% with the increase in oil prices and the political shifts in the region, despite the growth in the share of Egyptians from 5 to 12% (Ali, 1986). At the time, Egyptian migrants were mostly employed in labour-intensive roles, contributing to the rapid economic development of the region, driven by growth in the construction sector employing approximately 25% of the labour force. By the 1980s, declining oil revenues and reduced infrastructure investments shifted demand toward skilled workers to manage these projects (Ali, 1986). As GCC economies stabilised in the 1990s, labour demand moved towards education (Ridge et al., 2014).

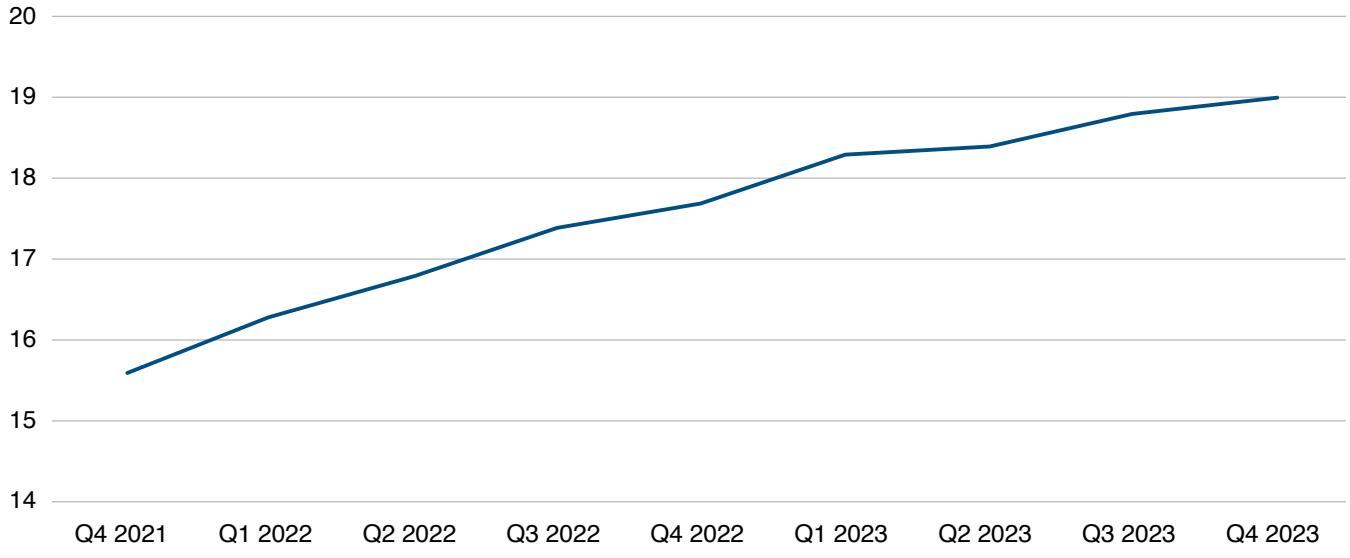
The implementation of the national development plans along with the macroeconomic conditions and the evolving strategic objectives starting the 2000s shifted labour demand towards high-skilled professionals in sectors like renewable energy, information technology, finance, and advanced manufacturing (Shayah and Sun, 2019). Accordingly, the GCC labour market policies have evolved to balanced domestic employment goals with the need for international talent to support this economic diversification, aiming to reduce foreign labour dependency and promote private-sector employment for nationals (Shayah and Sun, 2019).

Determinants of Demand in GCC Countries and Trends in Highly Skilled Migration

In their pursuit of economic diversification and the expansion of private-sector employment, the GCC have adopted nationalisation policies[3] with the aim of lowering youth unemployment, encouraging national employment in the private sector, and encouraging women's labour force participation. However, these policies face challenges such as high reservation wages,[4] preference for public sector jobs, and nationalisation quotas, limiting the integration of nationals into private-sector roles (World Bank, 2019).

The previously identified challenges have limited the ability of the private sector to recruit national citizens. Accordingly, expatriate labour are filling the private sector gaps, leading to the increase in foreign labour. Figure 1 below shows the evolution of the number (in millions) of foreign labourers

Figure 1: Number of Foreign Labourers (in Millions) in the GCC Countries (2021–2023)



GCC-STAT, 2024

in the GCC indicating an increase in the total number of foreign workers in all GCC countries combined, with 63% being present in Saudi Arabia.

Parallel to the nationalisation policies, the GCC have adopted policies towards the long-term residence of expatriate workers (Karolak, 2024). These policies aim to provide long-term residency options for skilled professionals by offering competitive packages and incentives, aligned with their strategic focus on the IT, healthcare, and finance sectors.

However, ensuring adequate social protection for migrant workers, who constitute between 76% (Saudi Arabia) and 95% (Qatar) of the workforce,[5] remains a concern. Although Bilateral Labour Agreements (BLAs) and Memorandum of Understandings (MoUs) help set minimal standards for migrant workers, they often fall short of providing comprehensive social security or healthcare benefits, along with the portability of these benefits to the country of origin.[6] Reliance on employer-liability provisions for sickness, maternity leave, and workplace injuries, rather than collective financing and risk-sharing mechanisms, results in reduced coverage, inequities, and a lack of sustainability in social protection frameworks (ILO, 2023). Compounded by the limited ability of migrant workers to carry these benefits back to their country of origin upon return, results in the limited attractiveness of the GCC for the highly skilled migrants. A comprehensive policy framework is therefore essential for fair labour practices that benefit the highly skilled migrants.

Drivers of Highly Skilled Migration from Egypt to the GCC

Push Factors in Egypt

Economic instability, high unemployment, and skill mismatches push highly skilled Egyptians to seek opportunities in the GCC. High unemployment rates among educated youth, limited career advancement, and bureaucratic challenges further incentivise migration (Abdelbaki and El-Sherbiny, 2021).

According to the 2013 Egypt Household International Migration Survey (EGYPT-HIMS 2013), 87% of Egyptian migrants go abroad for economic reasons, with most migrants being men aged 25 to 44 (IOM, 2016). The significant gap between educational attainment and job market needs has led to the prevalence of high unemployment rates among educated youth, where approximately 45% of the unemployed Egyptians hold university degrees or higher, which together with low wages and inadequate living conditions, appear to be the key drivers of migration (CAPMAS, 2024).

Political and social challenges, including restricted freedoms, have also influenced migration decisions, as workers seek more stable environments abroad. The prevalence of centralised bureaucracy, corruption, and nepotism, combined with inadequate infrastructure and public services, prompts many Egyptians to seek more stable environments abroad (Abdelbaki and El-Sherbiny, 2021). The struggle to re-adjust to life back in Egypt among returnees further reinforces the decision to remigrate.

Pull Factors in the GCC

Egyptian migrants explained that as opposed to the complex immigration procedures and the cultural differences in the West, cultural and socioeconomic reasons are behind the preference of Egyptians for the GCC, such as the geographic, cultural, and religious proximity between them, as well as the relatively lower cost of migration, lower taxes, and the easier entry processes. [7]

Highly skilled migrants from Egypt overwhelmingly cited economic opportunities as their primary motivation for migrating to the GCC. Factors such as higher salaries, little to no income tax (as in Dubai and Saudi Arabia), and lower living costs were mentioned as significant advantages over Western countries.[8] Migrants highlighted that the relative ease of obtaining visas and the proximity of the GCC to Egypt also play a crucial role in their decision-making process.

The competitive compensation and economic incentives are a strong attraction point for the GCC, enabling Egyptian migrants to send substantial remittances back home. Remittances have become a critical financial lifeline, contributing approximately USD 32 billion to Egypt in 2022, retreating back to approximately 22 billion in the fiscal year 22/23, with a significant portion originating from Saudi Arabia and the UAE (CBE, 2024).[9]

Shifts in policy focus, including the labour market reforms,[10] aim to make the GCC states more attractive for skilled migrants by offering lucrative financial packages and tax incentives that are often more attractive than those available in other global markets, including Europe.[11] However,

addressing gaps in social protection remains critical to supporting fair labour practices for all workers, regardless of nationality.

Comparative Analysis of Gender Dynamics in Highly Skilled Migration

Gender dynamics shape migration patterns to the GCC, with a notable rise in female immigration in sectors like healthcare and education. Economic independence and professional growth are significant motivations for female migration, although gender-specific barriers remain, including workplace bias and limited access to higher-level roles (Babar, 2020). Recent labour reforms improve opportunities for female professionals,[12] but nationalisation policies and MoUs often lack gender-sensitive provisions, impacting women's workforce participation. Incorporating gender-specific measures into migration policies can promote more inclusive labour markets.

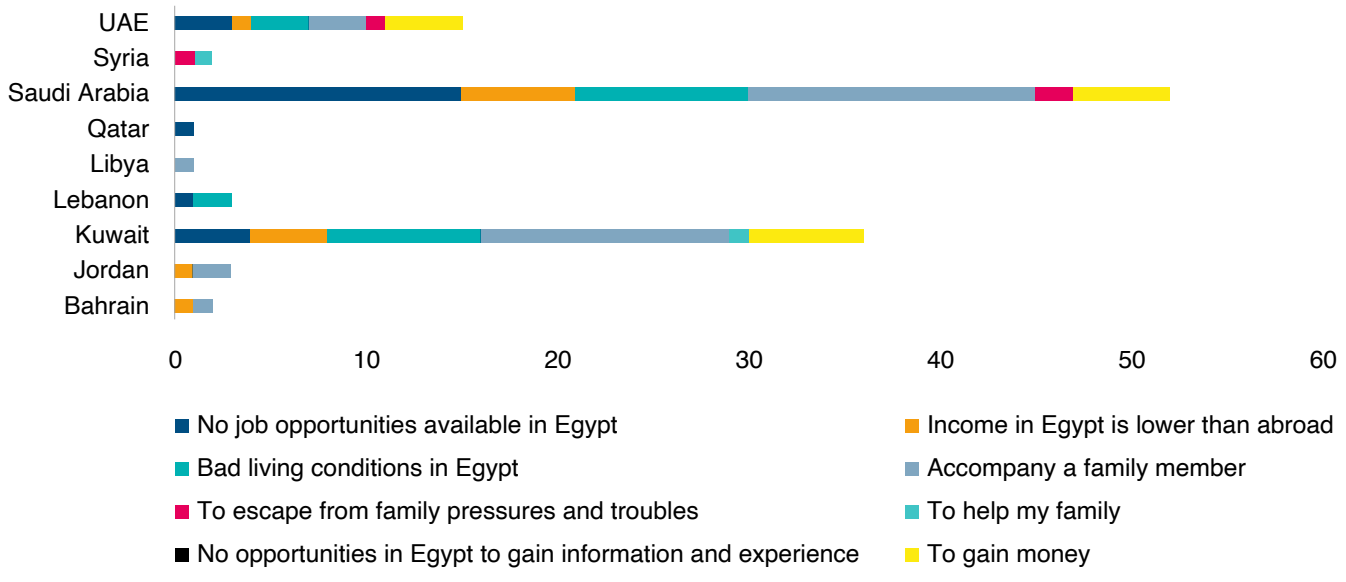
Given the small volume of female migration from Egypt, limited information exists, adding a constraint to comprehensively understanding the nature of and the barriers to this migration for evidence-driven policy.

According to Egypt's national statistical institute, the Central Agency for Public Mobilization and Statistics (CAPMAS), approximately 97% of the total issued work permits were for Arab countries in general, with a total of 19,000 work permits issued to women. Furthermore, the potential migration module of the Egyptian Labour Market Panel Survey (ELMPS 2018) shows that Saudi Arabia, the UAE, and Kuwait represent the top three aspired destinations for men and women. Figure 2 below shows the reasons for migration aspirations among women. Accompanying a family member appears to be a significant reason for women, followed by the limited job opportunities in Egypt and the aspirations to gain more income. However, the survey does not provide additional details to provide a comprehensive study of the female migration from Egypt so general conclusions cannot be drawn.

Interviews with migrants indicate that economic incentives, cultural familiarity, and lower living costs are significant pull factors for men and women considering migration to the GCC. However, female migrants, already very few, specifically emphasised the appeal of economic independence and professional growth opportunities, which are often less accessible in their home countries (Babar, 2020). While opportunities exist, the general perceptions allude to the migration environment not being equally conducive for women due to biased and limited accessibility to higher-level jobs.

Al-Waqfi and Al-Faki (2015) used Dubai Labour Market Survey (DLMS) 2007 data to show that female workers in the UAE (whether nationals, Arabs, or Asians) are modestly represented in managerial and production positions, pointing to the need for more gender-responsive migration and labour market policies.

Figure 2: Reasons for Migration Aspirations Among Egyptian Women (2018) (%)



Source: Author's own calculations using ELMPS 2018

Migrant women face additional barriers in accessing private sector employment in the GCC, further complicated by limited social protections and inadequate social security provisions for migrant workers and their families (ILO, 2023). This is a significant omission that disproportionately impacts female migrants, who are more likely to have family responsibilities that influence their employment choices (ILO, 2023). Moreover, the limited ability of women to sponsor their husbands in some GCC countries (including Saudi Arabia and Qatar) has further limited the attractiveness of the region to married women.

The lack of gender-sensitive provisions undermines the effectiveness of workforce nationalisation policies and limits the employment of women in highly skilled roles. Accordingly, policymakers must develop targeted strategies that address the disparities, incorporate gender-specific provisions in bilateral agreements, and ensure equitable access to social protection. Such efforts are crucial in leveraging the full potential of both male and female talents to meet the evolving economic needs of the GCC countries.[13]

Secondary Data Analysis on Highly Skilled Migration from Egypt to the GCC Countries

To comprehensively understand the migration patterns of highly skilled workers from Egypt to the Gulf Cooperation Council, it is crucial to adopt a consistent and internationally recognised framework for defining "highly skilled occupations." The ILO's International Standard Classification of Occupations (ISCO-08) provides a robust basis for such classifications. The ISCO-08 framework[14] categorises occupations into four skill levels and captures a broad range of occupations requiring advanced knowledge and skills typically obtained through tertiary education or equivalent professional experience. Utilising this framework ensures the consistent identification of highly skilled workers, enhancing the credibility and comparability of the analysis across different contexts and regions.

Analysing the Demand for Highly Skilled Egyptian Workers in the GCC

To assess the demand for highly skilled Egyptian workers in the GCC, an analysis of advertised job openings on online recruitment platforms such as Wuzzuf[15] and Forasna[16] was conducted. These platforms are primarily directed at Egyptian workers seeking jobs in Egypt or the MENA region. As such, they frequently list job opportunities in the GCC, including Saudi Arabia, Qatar, and the UAE.

Job postings reveal a range of positions advertised for Egyptian workers in the GCC, encompassing several highly skilled occupations as defined by the ISCO-08 classifications. The analysis highlights key insights regarding the nature of the demand for these roles:

- On Forasna, almost all jobs had specified salaries.[17] Additionally, all advertised positions provided access to medical and social insurance, suggesting a baseline level of social protection for these workers.[18] Some job postings specified gender preferences and work-from-home options, reflecting diverse employment conditions and preferences among employers.
- The Wuzzuf job postings for Qatar, UAE, and Saudi Arabia spanned a range of roles, from entry-level to senior management positions.
  - Qatar showed the highest demand with 233 job postings, primarily for entry-level roles in Sales/Retail, Customer Service/Support, and IT/Software Development.
  - The UAE had fewer job postings, focused on managerial roles in Sales/Retail, Operations/Management, and Customer Service/Support, indicating opportunities for highly skilled workers.
  - Saudi Arabia's job postings included roles in Customer Service/Support, Sales/Retail, and Administrative positions, reflecting ongoing economic reforms aimed at diversifying the economy and enhancing private sector participation.
- A comparative analysis of job opportunities across the three countries reveals distinct patterns.
  - Qatar appears to have a broad demand for younger professionals or those seeking entry into the labour market, reflecting its economic diversification efforts.
  - The UAE shows demand for skilled professionals, particularly in managerial roles, suggesting a focus on higher-level expertise.

- Saudi Arabia reflects a demand for administrative roles, aligning with its efforts to manage both local and expatriate workforce requirements under its ongoing reforms.

The data suggests robust demand for both entry-level and experienced professionals in the GCC, with a noticeable emphasis on sales, customer service, and support roles. Opportunities for highly skilled professionals, particularly in specialised fields such as engineering, finance, and management, are present but more limited and concentrated in specific sectors. Interviews with current migrants and recruitment agencies have identified that jobs in the professional fields are facilitated on an individual basis, where further quality assessments are needed, beyond the degrees, limiting the hiring in these sectors through online platforms.[19]

Recruitment Methods for High-Skilled Jobs in the GCC

The Egypt's Ministry of Labour promotes opportunities for low- and middle-skill occupations through its online platforms and ads in social security offices and other governmental offices affiliated with the ministry serving the public. Consequently, this leaves the recruitment for high-skilled roles to be predominantly driven by individual efforts, social media, digital platforms, and secondment or transfer arrangements within multi-branched companies. This highlights the absence of a coordinated, government-led strategy to support the employment of highly skilled professionals in the GCC countries.

Among the digital platforms are the abovementioned Wuzzuf and Forasna, which are primarily directed at Egyptian workers seeking jobs in Egypt or the MENA region. Despite the availability of these online recruitment platforms, there are limited official outlets specifically targeting high-skilled roles in the GCC.

Another notable recruitment method involves multinational and regional companies. High-skilled professionals may be relocated to the GCC through their local companies in Egypt, whether remotely or physically. For non-practical roles, such as financial analysts or business consultants, remote assignments are common, whereas technical high-skilled professionals, including engineers, medical personnel, and teachers, could be hired locally in Egypt and seconded to branches or projects in GCC countries.

Private recruitment agencies also play a significant role in matching job seekers with jobs in the GCC. An interview with the CEO of Pioneers for Human Resources, highlighted the limited efforts by the GoE to secure jobs for professionals in the GCC or to keep records of their migration. The Business-to-Business (B2B) model has become more successful for recruitment in the GCC countries. The private sector employer deals with a national recruitment agency and the job seeker in Egypt deals with a local recruitment agency. It is the agencies' role to communicate, screen, ensure visas and documents are ready, and follow up with both the employer and job seeker until the matching takes place and the job seeker starts his/her job.

The healthcare sector is one of the sectors where there is a large demand, especially from Saudi Arabia, at all skill levels, the B2B model has proven more successful in recruiting healthcare professionals in the GCC as compared to the government-to-government model. The main drawback is the limited official recording of the pathways of highly skilled migrants. As per the CEO of Pioneers recruitment agency, "*if the migrant is proceeding in his/her job smoothly and was able to secure a renewal of contract with the same employer, or move to another employer or even another country, the recruitment agency in Egypt is not informed, nor are the[re] official records of the government.*" Therefore, data and information are highly unavailable, limiting proper academic analysis and data-driven recommendations.

Challenges and Barriers in Skilled Migration to the GCC

Brain Drain

While the GoE aims at better managing migration and ensuring a sustainable flow of remittances, concerns about brain drain have been appearing as a main challenge. In an interview with a government official in Egypt, he shared the GoE's concern with the potential consequences of the increased emigration of highly skilled workers, especially in the healthcare sector. The official also mentioned that the GoE has not been able to see the reflection of the new policy reforms on the migration of highly skilled workers from Egypt, however, they are seeing the impact on the health sector from the increased emigration of skilled healthcare professionals.

Legal and Regulatory Challenges

The legal and regulatory environment for skilled migration to the GCC presents several challenges that complicate the ability of foreign workers, including Egyptians, to navigate the labour market effectively. The World Bank (2019) has identified these challenges to include labour nationalisation policies, restrictive residency frameworks, and limited job mobility.[20]

In-depth interviews with Egyptian migrants[21] indicate substantial difficulties in navigating the legal and regulatory frameworks of the countries. While recent reforms have aimed to streamline visas, work permits, and residency processes, significant challenges remain. For instance, the Kafala (sponsorship) system, which ties a migrant worker's employment status to a single employer, has significantly restricted mobility and workers' rights, limiting the ability of workers to change jobs or remain in the country without an employment relationship. Despite recent reforms in Qatar, the UAE, and Saudi Arabia, the system continues to limit benefit portability and discourage multi-employer mobility impacting to a larger extent the highly skilled migrants (ILO, 2023). This creates a complex regulatory environment for skilled migrants.

Social and Cultural Barriers

Social and cultural integration significantly impact the decision-making of skilled migrants considering relocating to the GCC. Interviews with Egyptian migrants reveal that, despite the economic incentives, the lack of permanent residency options and limited opportunities for social integration are major deterrents to long-term settlement.[22] Migrants frequently experience challenges in establishing a sense of belonging or continuity in the GCC due to restrictive residency policies and the absence of pathways to citizenship, prompting many to consider secondary migration to other regions where social integration is more feasible.

The World Bank (2019) emphasised that while human capital development and labour market reforms are crucial for achieving knowledge-based economies, policies in the GCC often remain misaligned with the skills required by the private sector. Distortionary policies, such as generous subsidies and high reservation wages, continue to steer labour toward public-sector employment, leading to a persistent over-reliance on foreign labour in the private sector. To address these issues, efforts are needed to improve human capital formation through targeted education, skills training, and health investments (World Bank, 2019).

Social Protection for Migrant Workers in the GCC

Earlier discussions have identified the social protection and portability of benefits to be among the top challenges facing highly skilled migrants in the GCC. Employer-based schemes dominate social protection in the GCC, often lacking comprehensive coverage. Moreover, family members of migrant workers are generally not covered by existing provisions, leaving many dependents without access to necessary social benefits (ILO, 2023).

The current policies do not provide mechanisms for the accumulation and portability of benefits across different employers and contracts nor back to their country of origin. This limitation significantly affects the ability of migrant workers to build financial security over time, especially given the temporary nature of most employment contracts in the GCC (ILO, 2023).

The existing social protection frameworks do not fully align with international labour standards, particularly regarding collective financing, broad risk-sharing, and equity in benefit provision.

Several opportunities exist for the GCC to enhance social protection for migrant workers. These opportunities include extending coverage to all employment types, enhancing portability, and aligning frameworks with international standards to create a fairer labour market. Bilateral agreements could enhance protections, addressing critical gaps in social security and benefit access.

Economic, Developmental, and Social Outcomes of Highly Skilled Migration

Impact on Egypt

Economic impact: Remittances, taxation, and contribution to GDP

The migration of highly skilled professionals from Egypt to the GCC has a significant economic impact, both positive and negative. On the positive side, remittances form a crucial component of the national economy, contributing to

household incomes and providing vital foreign exchange reserves. According to recent data, Egypt ranks sixth among the top ten countries worldwide in receiving remittances and fifth among medium and low-income countries (IDSC, 2023). In 2021, the World Bank data portal showed that 74% of these remittances came from Saudi Arabia, the UAE, Qatar, Kuwait, and the USA, with Saudi Arabia and the UAE being the largest sources.

Figure 3 below shows an increasing trend in the volume of remittances received by Egypt (in billion USD). Despite a decline in the volume of remittances received in 2023, official sources show that the remittance inflow to Egypt as of June 2024 represents an increase over the same period in 2023. Recent data from the Central Bank of Egypt highlights a substantial increase in remittances, with a 73.8% rise in May 2024 compared to May 2023 and a 26.6% increase compared to April 2024, amounting to $2.7 billion in May 2024 alone. This trend reflects the ongoing importance of remittances as a key financial inflow (CBE, 2024).

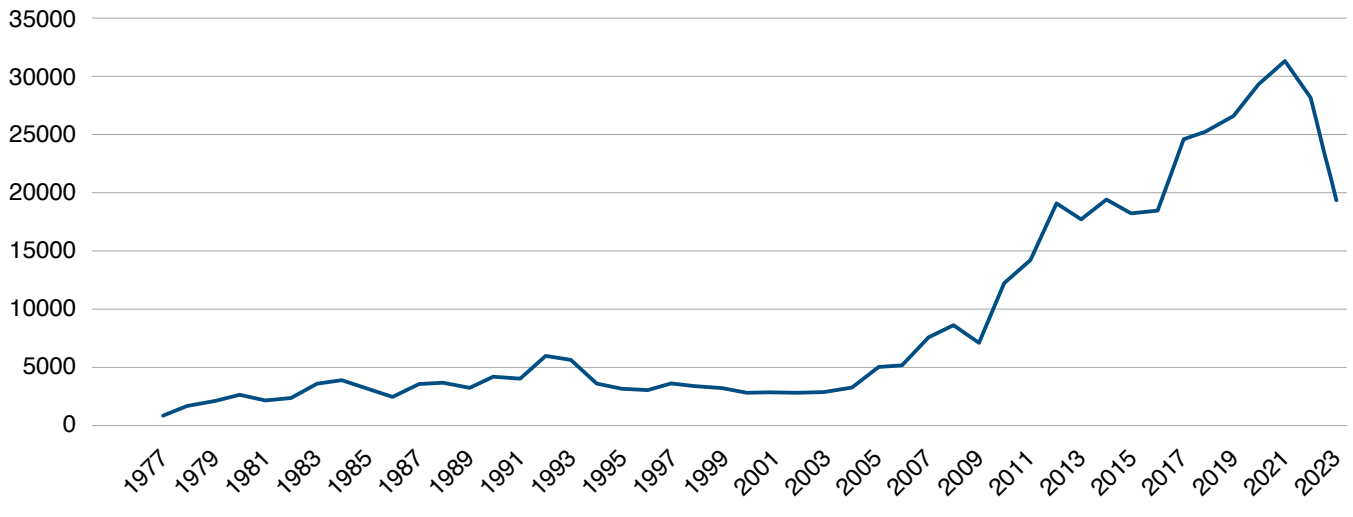
Remittances constitute approximately 23% of Egypt's total foreign exchange resources, surpassing tourism and following only exports. According to the World Bank data portal, they also account for 6% of Egypt's GDP, emphasising their critical role in stabilising the macroeconomic environment and alleviating poverty.

While remittances provide a lifeline for many households and bolster the economy, the migration of highly skilled professionals also poses challenges, particularly in the form of brain drain. The departure of highly skilled workers from critical sectors, such as healthcare, exacerbates existing skill shortages and reduces the country's human capital stock, potentially impacting economic growth and productivity (Mohamed and Mahmoud, 2020). This was particularly highlighted in the post-COVID period in Egypt with the significant increase in the number of medical doctors resigning from their positions in the public sector. There are no actual figures on the migration of these medical doctors,[23] however, the situation has been flagged as risky in terms of the number of medical doctors registered with the public sector, limiting the ability of the healthcare sector to serve the country's growing population.[24]

Ismail (2024) showed that half of the registered Egyptian physicians work abroad, while others had high intentions to leave the country and low intentions for those who are abroad to return (66.4% and 6.8% respectively), indicating a potential risk of resource loss in the country. On the economic growth side, Mohamed (2020) showed that a 1% increase in talented migration was combined with a 5.7% decrease in the GDP during the period 2000–2018.[25]

Nonetheless, sometimes this brain drain turns to brain gain when migration is temporary and skilled migrants return to their country, as they exhibit an advanced level of skills, higher income, and higher occupational progress (El-Mallakh and Wahba, 2016).

Figure 3: Remittance Inflows to Egypt (Billion USD) (1977–2023) (Annually)



Source: World Bank Data Bank

Developmental impact: Knowledge transfer and skills development upon Return

Migration reduces pressure on Egypt's labour market by creating opportunities for employment abroad that the domestic economy may not be able to provide, particularly in specialised sectors. However, the developmental benefits of migration depend heavily on effective policies to facilitate the reintegration of returning migrants and leveraging their skills for national development (Sika, 2010).

While there are concerns about the negative effects of brain drain, the migration of highly skilled workers from Egypt to the GCC offers opportunities for brain circulation. Through skills accumulation, returning migrants can enhance local capacity, contribute to innovation, and even establish private businesses that create new jobs and drive economic growth (Sika, 2010). The small scale of these investments limits the expanded knowledge and the ability to monitor and keep a record of the numbers and the sizes of these small investments. However, as a national priority, Egypt has been taking solid steps to enhance the investments of Egyptian expatriates in Egypt in multiple ways. Establishing a separate unit at the General Authority for Investment and Free Zones, known as the Egyptian Expatriates Investment Unit,[26] acts as a one-stop shop for Egyptian expatriates considering investment in Egypt. The investment opportunities provided are spread across different sectors, however, what has been attracting most of the investments of Egyptian expatriates is the real estate sector.

The potential benefits of knowledge transfer and skills development upon return are often undermined by inadequate reintegration frameworks and limited opportunities for highly skilled returnees to apply their acquired skills. Consequently, Egypt risks losing the full potential of brain circulation if policies do not adequately support the reintegration of these migrants and harness their expertise for national growth (Abdelbaki and El-Sherbiny, 2021).

The Egypt-German Centre for Jobs, Migration and Reintegration is an example of a bilateral initiative that not only works on enhancing the matching opportunities for Egyptians with jobs in Germany but also provides support for matching workers with jobs in the Egyptian job market upon their return as well as guidance and support for them to start their own businesses. This is an example that can be replicated with other major countries of destination for Egyptian migrants. On the one hand, it supports skills enhancement to match demands, on the other, it supports the reintegration of Egyptians upon return, resulting in a triple-win of benefits to the migrant and the country of origin.

Impact on the GCC Countries

Egyptian professionals in healthcare, education, and engineering are vital to the GCC's economic goals. However, limited residency options and inadequate labour rights challenge long-term retention. Issues such as limited pathways to permanent residency or citizenship, inadequate labour rights, and barriers to social and cultural integration continue to affect the ability of the GCC to retain skilled talents in the long term. Although recent reforms are steps in the right direction, interviews with Egyptian migrants in the GCC show that the effectiveness of these policies is constrained by the lack of comprehensive rights and protections for migrant workers in addition to the limited portability of benefits.

Policies and Strategies on Highly Skilled Migration

Egypt's Policies on Highly Skilled Migration

Egypt aims to address domestic socioeconomic pressures through migration while optimising the benefits of remittances. The GoE highlighted the significance of training and equipping potential migrants with the needed skills for easier matching with the labour markets of the countries of destination (Barakat, 2024).

While there are no specific policies managing the migration of the highly skilled, a number of initiatives have been identified that highlight the attention of the GoE towards equipping and preparing workers for jobs in the countries of destination (95% of which are Arab countries) (CAPMAS, 2019; Mohamed, 2020). Accordingly, as per an interview with a government official at the Ministry of Labour, great attention is devoted to identifying the skills in demand in the countries of destination and the establishment of specialised training equipping potential migrants with needed skills to ensure a better outcome.

Programmes like "Life Saving Boats" and "Digital Start" focus on equipping workers with necessary skills, although specific support for highly skilled migrants remains limited. Strengthening skill-matching and improving reintegration frameworks for returning professionals would enhance developmental gains. "Aslak Altayeb" initiative, was launched to establish a framework of networking and integration between professional Egyptian migrants and civil society organisations and enhance their role in supporting

infrastructure and service projects and improving the quality of services provided to citizens in villages with the highest risk of irregular migration (SIS, 2024).

Furthermore, "Voice of Egypt in Africa" and "Reviving Roots—Nostos" seek to strengthen Egypt's diplomatic ties and economic cooperation with other countries, fostering networks that may enhance the mobility of skilled workers. These programmes reflect a broader strategy to integrate migration within national development plans and optimise the benefits of the Egyptian diaspora.

The Egyptian constitution explicitly guarantees the right to migrate, and various laws have been enacted to support emigrants. For example, Law 111 of 1983 provides several incentives, such as dual nationality, tax exemptions on foreign-earned income, and the exemption of children from military duty, to encourage engagement with the home country (Badawy, 2010; Sika, 2010). The GoE has also participated in labour agreements with other countries to facilitate the integration of Egyptian migrants and protect them from mistreatment.

Despite these efforts, gaps remain in effectively aligning migration policies with national development goals. Challenges include a lack of coordination among various ministries and the need for more robust skill-matching initiatives with countries of destination including the GCC. There is also a need for Egypt to adopt practices that better prepare its citizens for employment in GCC markets.[27]

While these initiatives demonstrate a commitment to leveraging migration for development, they often lack targeted focus on the needs of highly skilled migrants specifically. There is room for improvement in developing BLAs with the GCC that better address the specific fair treatment and rights protection for Egyptian migrants (World Bank, 2019).

GCC Policies on Attracting and Retaining Highly Skilled Migrants

Reforms, including partial adjustments to the sponsorship system and residency programmes, are steps toward retaining talent. However, the limited pathways to permanent residency and citizenship reduce the long-term appeal. Nationalisation policies also pose challenges for foreign professionals, highlighting the need for policies that balance local workforce goals with economic productivity. These policies, while necessary for addressing youth unemployment and improving national participation in the private sector, often create barriers for foreign workers and may reduce the competitiveness of the business environment (World Bank, 2019). To balance these objectives, the GCC should consider adopting streamlined approaches that enhance the private sector's attractiveness to nationals without negatively impacting economic productivity or deterring highly skilled migrants.

Stakeholders' Perspectives on Highly Skilled Migration Policies and Trends

The interviews provide a nuanced understanding of the motivations, challenges, and opportunities associated with highly skilled migration from Egypt to the GCC. While economic incentives and cultural proximity are strong motivators, significant barriers remain. To better manage and benefit from this migration, both the GoE and the GCC must consider reforms that address these issues and foster a more supportive environment for highly skilled migrants. Enhancing bilateral cooperation, providing targeted support programmes, and improving reintegration policies can enhance the developmental benefits of skilled migration, ensuring its positive contribution to economic and social objectives.

Migration experts' perspectives

Migration experts in Egypt have emphasised the need for reforms in migration policies including establishing stronger ties with Egyptian expatriates, creating databases to capture their skills and experiences, and improving the social and economic environment to retain and reintegrate these skilled professionals upon their return to Egypt.[28]

The migration portfolio has been moving across different ministries leading to a change in vision with regards to migration management. Most recently, in July 2024, the Ministry of State for Egyptian Expatriate Affairs merged with the Ministry of Foreign Affairs, highlighting a new phase where the migration portfolio is not only about relieving pressures on the local labour market but also establishing a strong connection with the consulates and embassies of Egypt abroad for maintaining a stronger connection between the migrant and their home country. This new merge further highlights the role of the Ministry of Foreign Affairs in establishing relationships with different countries of destination to strengthen existing relations and negotiate agreements with new markets for Egyptians.

Even though several initiatives have been undertaken by the previous ministries to better connect with migrants abroad and specifically encourage them to start investing in Egypt, the impact has been limited as per the migration experts. However, no official impact assessment has been conducted nor have any official achievements in these initiatives been shared. Despite efforts by the Ministry, tangible results remain limited to those who match with jobs abroad through the ministry or the official government channels.

Migrants' perspectives

Despite the economic benefits, migrants reported facing several challenges in the GCC. A significant issue is the link between residency status and employment contracts. The termination of a job contract often results in immediate loss of residency rights. Different countries provide different options for the migrant upon the end of the contract. For example, in the UAE and Saudi Arabia, expatriates can have a 30-day grace period to find a new job or to leave the country. Beyond the grace period, expatriates in the UAE can apply for a change of status and apply for a different visa while inside the UAE or pay a fine of AED 50 per day for every day they stay beyond the grace period until a new contract is secured or they leave the country. According to Saudi Arabia's Ministry of Interior, the reporting of the end of contract is necessary for the employer and any delay leads to sanctions and fines on the employer. For the expatriate worker, overstaying the visa beyond the grace period could lead to deportation. According to Qatar's Ministry of Interior, the grace period extends to 90 days with imprisonment or a fine amounting to QAR 10,000 for overstaying beyond the grace period. This places migrants at risk of illegal status and potentially facing deportation.[29] This instability creates a precarious living situation, especially for those with families or dependents.

Despite the cultural proximity, migrants have highlighted the limited social life and cultural integration in the GCC as another challenge. Migrants expressed feelings of isolation due to being away from their families and friends, compounded by the limited social and recreational activities available to them where migrants feel they are treated as temporary labour with limited rights and opportunities for long-term settlement.[30]

Despite the efforts of the GoE to maintain the connection with migrants, they reported dissatisfaction with the support received before and during their migration. They noted that no specific programmes or services help them prepare for migration, such as informational seminars about their destination countries. Many were unaware of any government efforts to engage with or benefit from their skills and experience while abroad. Additionally, some mentioned that even Egyptian consular services in their host countries treated them poorly and charged high fees for the offered services which included passport renewals and issuing official documents like birth certificates for children.[31]

GCC Employers' Perspectives

GCC employers face challenges related to retaining highly skilled professionals. The interviews indicated that while the working conditions in the GCC are attractive, issues related to labour rights, strict working hours, and limited social and cultural integration remain significant concerns. Additionally, the temporary nature of employment contracts tied to residency status creates a sense of insecurity and instability among migrants.

Role of Bilateral Agreements in Labour Migration Governance

Importance of bilateral agreements and MoUs

BLAs and MoUs are crucial instruments for managing labour migration. While they are generally concerned with labour market matching and predictability, mainly concerning middle and low-skilled migrants, alternative aspects could also be of relevance to high-skilled migration. These agreements also focus on the protection of migrants' rights in terms of remittance facilitation and benefit portability aligning with international frameworks.

Existing bilateral agreements and current status

While there are numerous announcements of efforts and meetings aimed at enhancing cooperation and coordination of labour mobility between Egypt and the GCC, the number of formalised and effective agreements in action remains limited. Moreover, the primary focus is facilitating safe and orderly migration, issues of significance to low and middle-skilled migrants.

Few official agreements include for example the Occupational Investigation Agreement signed with Saudi Arabia in early 2024, which mandates the certification of specific technical skills to ensure that migrants possess the qualifications required by the Saudi labour market. This agreement represents a targeted effort to align the skills of Egyptian workers with the labour market demands of Saudi Arabia, but it remains narrowly focused on a limited number of sectors such as electricity, plumbing, welding, carpentry, and auto mechanics (SIS, 2024). However, this agreement is still

limited in scope and does not cover broader aspects such as fair recruitment practices, comprehensive social security provisions, or protections for migrant rights (SIS, 2024).

The Labour Attache of Egypt in Kuwait has shared information regarding the current ongoing discussions regarding the bilateral agreements on the management of migrant workers to Kuwait. Kuwait has recently adopted more restrictive policies towards migration. accordingly, their emphasis on skills assessments and recognition of qualifications is currently on the top of the agenda for the discussion on formal cooperation between the two countries to better manage migration flows.

According to an official representative at the Ministry, current discussions would need to focus on the highly skilled migrants in terms of remittances facilitation and benefits portability. As per the ministry official, these are considered the main concerns to ensuring the benefits to the country of origin from the migration of the highly skilled.

To strengthen the governance of labour migration, there is a clear need for Egypt and the GCC to enhance their cooperation by incorporating comprehensive provisions that align with international labour standards. These provisions need to address the diversity of migrant workers by skill level (low, middle, and highly skilled) and also by gender. These agreements need to include clauses that guarantee social security benefits and portability, workplace safety, fair remuneration, and non-discriminatory treatment of all workers, regardless of gender or nationality. Accordingly, fostering a social dialogue, that involves social partners—such as employers, low-skilled, middle-skilled, highly skilled, and female migrants, would better guide the process from negotiation to implementation. This approach would enhance transparency, ensure that the concerns of all stakeholders are adequately addressed, and lead to more effective monitoring and enforcement of agreements.

Opportunities for Developing Comprehensive Agreements with the GCC

Given the GCC's increasing need for highly skilled migrant workers and their focus on specific skill sets aligned with their economic diversification goals,

There is a pressing need for Egypt to pursue more comprehensive and detailed agreements with the GCC. Agreements should address key areas of significance to highly skilled migrants including social security provisions. Migrants are often excluded from the national systems and rely on employer-sponsored arrangements which are typically not portable. When migrants contribute to social security funds, these benefits are non-transferable upon leaving the host country. Retirement and end-of-service savings are non-transferable to pension schemes in origin countries. Instead, a lump-sum amount is paid which may not be sufficient for long-term financial sustainability. Similarly, health insurance benefits, where coverage is usually linked to the employer, may not be extended for international coverage upon the end of the agreement with the employer. These issues specifically lead to economic insecurity among highly skilled migrants, decreasing their motivations and leading, in some cases, to double contributions—in the host and origin country—creating a challenge for the GCC in attracting highly skilled migrants.

Addressing the unique challenges faced by female migrants may also facilitate their migration. Limited support for family-related responsibilities and childcare accessibility, in addition to sector segregation and inadequate protections against gender-based discrimination and workplace harassment, are among the main challenges facing highly skilled female migrants. Moreover, in some GCC countries, cultural expectations could restrict access to male-dominated networks thus limiting mentorship opportunities and adding to their career limitations. Including specific gender-sensitive provisions in agreements would promote a more inclusive approach to labour migration governance.

The Economic Future of GCC Countries: Anticipating Future Labour Demand

Vision 2030 and Knowledge-Based Economies

The GCC's economic visions[32] aim to diversify growth sectors, fostering demand for highly skilled professionals in IT, finance, and renewable energy. Despite the significant focus on diversification, GCC economies remain heavily dependent on oil revenues, which continue to shape their growth trajectories in the short term.

Ambitious public investment initiatives, such as Abu Dhabi's AED 50 billion economic stimulus programmes and Dubai's $7 billion investment in Expo 2020 infrastructure, are part of broader efforts to support the transition to knowledge-based economies (World Bank, 2019). Similarly,

Saudi Arabia's Vision 2030 includes substantial investments in renewable energy, small and medium-sized enterprises (SMEs), and the financial sector, reflecting a comprehensive strategy to diversify growth drivers and reduce reliance on hydrocarbons (World Bank, 2019). Despite ongoing reliance on oil, major investments support this transition, necessitating policies to attract both nationals and expatriates with specialised skills.

Challenges and Opportunities in Future Migration Patterns

While policy reforms represent steps towards creating a more conducive environment for highly skilled migration, significant challenges remain. Nationalisation policies can create a less favourable business environment and reduce reliance on expatriate workers. Additionally, gaps in BLAs and MoUs need to be addressed to ensure these agreements effectively balance local employment needs with the rights of migrant workers (ILO, 2017).

Social protection for migrant workers in the GCC is typically limited and unequal. Efforts to reform social protection systems have also seen progress, however, these measures often fall short of international standards for social protection and may exacerbate inequalities by creating a two-tier system based on nationality. Extending comprehensive social protection coverage to all workers, including non-nationals, is crucial for promoting fair and equitable labour practices in the GCC (ILO, 2023).

Despite economic integration efforts, cultural limitations continue to hinder social integration for migrants in the GCC countries. Moreover, European countries, such as Germany and Italy, remain strong competitors due to their citizenship options, despite recent improvements in GCC visa regulations.

Key Drivers of Secondary Migration from GCC Countries

Lack of permanent residency pathways, limited social integration, and employment insecurity drive secondary migration from the GCC to destinations with clearer settlement options, like Europe and Canada. While recent programmes offer longer-term residency, restrictive eligibility in terms of annual income, property ownership, and limited family benefits reduce their appeal.

Migrants seeking stable career advancement and comprehensive social protections often consider relocation. While some GCC countries have made progress in extending certain social protections, the systems remain largely employer-dependent, especially in terms of benefits such as pensions, unemployment insurance, and family allowances (ILO, 2023).

Secondary migration is also driven by the pursuit of economic stability and better career advancement opportunities. While the GCC countries offer tax-free salaries and lucrative job offers, these benefits may not outweigh the potential for long-term career growth and economic security found in other countries. Skilled professionals may find more diverse and stable job markets in countries like Canada, Germany, and the United States.

The lack of social integration opportunities in the GCC countries is another significant factor prompting secondary migration.[33] Countries with multicultural policies and more inclusive societal structures, like Canada or Australia, are often seen as more attractive destinations for migrants looking to settle with their families permanently.

Policy Recommendations

Recommendations for Egypt

To maximise the developmental benefits of migration and mitigate potential drawbacks, Egypt needs to adopt a more strategic approach to managing labour migration, particularly to the GCC. The focus should be on enhancing pre-migration support, leveraging migrant networks, strengthening bilateral agreements, and ensuring broader social protection for migrant workforce. Some of these conditions would be specific to low skilled migrants, others are more general to address both low skilled and high skilled ones.

Enhancing Pre-Migration Support and Leveraging Networks

The GoE needs to establish targeted training programmes to better prepare its citizens for employment in GCC countries, focusing on job-specific skills, language proficiency, and cultural orientation.[34]

Unlike countries such as the Philippines, which have established a digital database or platform to maintain communication with professionals abroad, Egypt is not maintaining a strong connection with migrants to leverage their skills

and experiences more effectively.[35] Accordingly, creating a centralised data bank would facilitate ongoing communication and engagement with Egyptian migrants, allowing for better tracking of skills and experiences that could be valuable upon their return.[36] Encouraging the formation and strengthening of existing networks, communities and professional associations among Egyptian migrants can also enhance knowledge transfer and promote investment back home, turning potential brain drain into opportunities for brain circulation and economic growth.

Strengthening Bilateral Agreements and Social Dialogue

To improve labour migration governance, the GoE should actively negotiate and implement more robust BLAs and MoUs with the GCC. These agreements should include specific provisions for social security, healthcare, and gender-sensitive policies, as well as protection against exploitation and fair recruitment practices (ILO, 2017). Such agreements could also facilitate the transfer of skills and knowledge to Egypt, potentially mitigating the adverse effects of brain drain. Moreover, enhancing social dialogue involving all stakeholders ensures their effectiveness and increased transparency.

Improving Awareness and Accessibility of Rights

The GoE must ensure that migrant workers are fully aware of their rights under existing agreements. This can be achieved by making these agreements widely accessible in multiple languages and formats, both online and offline, and disseminating them through appropriate channels in both origin and destination countries (ILO, 2023). Increased awareness would empower migrants to claim their rights and reduce their vulnerability to exploitation and abuse.

Recommendations for GCC Countries

To enhance their attractiveness to highly skilled migrants and ensure sustainable labour market integration, GCC countries need to reform their labour laws, improve social protection systems, and promote rights and integration for all migrant workers. Key areas of focus include reforming nationalisation policies, expanding pathways for permanent residency, and strengthening social protection measures.

Promoting rights, integration, and circular migration

GCC countries should continue reforming labour laws to offer greater social protection and rights to foreign workers, ensuring their security and integration into host communities. This includes developing policies that facilitate circular migration and enabling easier movement between GCC countries and migrants' home countries. Such policies would support a dynamic flow of talent, benefitting the migrants and the host communities by allowing skills transfer and reducing the potential for brain waste where migrants acquired skills are not fully utilised by their home country.[37] Examples of these policies exist, including the UAE's unemployment insurance and Qatar's wage protection system, however are not comprehensive enough especially in regards to transferability of benefits.

Strengthening governance and addressing social security gaps

To enhance the governance of migration, GCC countries should focus on more inclusive BLAs that involve all social partners, to ensure they are effectively protecting migrant workers' rights and meeting local labour market needs (ILO, 2017). Future agreements should also include comprehensive social security provisions, addressing gaps in healthcare, unemployment insurance, and family benefits. Expanding the role of social partners in shaping and monitoring these reforms would help ensure they are both effective and sustainable (ILO, 2023).

Adapting social protection to new employment arrangements

As employment arrangements in the GCC evolve, particularly due to reforms in the sponsorship system, social protection policies must also adapt. This includes developing systems that allow for the portability of benefits across multiple employers and provide coverage for non-standard employment arrangements. Such reforms are crucial for addressing new risks and vulnerabilities that workers may face, such as periods of unemployment between contracts (ILO, 2023).

Reassessing historical labour market practices

GCC countries should continue to modernise labour laws and regulations that have historically limited expatriate mobility and social protection. Reforms should focus on creating more flexible and equitable labour markets that encourage both national and expatriate participation, moving away from rigid employer-specific sponsorships and the absence of collective bargaining rights (Sassanpour, 1997). Additionally, refining nationalise policies to ensure they do not inadvertently discourage the employment of highly skilled foreign professionals is critical. This could include adjusting quotas, reducing wage disparities between public and private sectors, and improving labour rights.

Expanding pathways for residency and enhancing social protection

While recent reforms have introduced longer-term residency options, there is a need for clearer pathways to permanent residency and, if and where feasible, citizenship. Such pathways would make the GCC more attractive to highly skilled migrants seeking stability and long-term career development opportunities. Concurrently, expanding access to social security, healthcare, and other benefits currently limited or tied to specific employers is essential. Improving these aspects would help address concerns related to job security, mobility, and fair treatment, making the GCC a more competitive destination for global talent (ILO, 2023).

Conclusion

This report provides a comprehensive analysis of the trends, dynamics, and policies influencing the migration of highly skilled individuals from Egypt to the GCC. It emphasises the multifaceted nature of this migration, shaped by a complex interplay of economic incentives, labour market needs, social factors, and policy frameworks in both origin and destination countries. As the GCC pursue economic diversification and development strategies, understanding and effectively managing migration flows become critical for achieving long-term labour market and socio-economic goals.

The findings reveal that while highly skilled Egyptian migrants are attracted to the GCC by factors such as higher wages, low or non-existent taxes, cultural proximity, and new policies that ease residency and employment conditions, significant challenges remain. These include legal and regulatory barriers such as restrictive sponsorship systems, limited social protections, and a lack of long-term residency options, which can deter potential migrants and contribute to secondary migration. Moreover, there is a notable gap between the migration policies promoted by Egyptian authorities and the lived experiences of migrants, with many reporting insufficient pre-migration support, inadequate protection, and limited engagement from the home government once abroad.

The analysis also highlights that the few informal and limited agreements fall short of providing comprehensive governance frameworks for highly skilled migration. They often lack specific provisions on social security, healthcare, and gender-sensitive policies. Addressing these gaps is essential to safeguarding migrant rights, reducing vulnerabilities, and enhancing the developmental impact of migration.

Furthermore, the report identifies opportunities for policy improvements including for Egypt, enhancing pre-migration support, leveraging migrant networks, strengthening bilateral agreements, and increasing awareness of migrant rights. For the GCC countries, reforming labour laws, expanding social protection, and creating clearer pathways for residency and citizenship are critical steps to attract and retain highly skilled talent. Both regions would benefit from a more collaborative approach, emphasising social dialogue and shared responsibility for equitable and sustainable migration frameworks.

In conclusion, the report highlights the need for more strategic, inclusive, and evidence-based policies to better manage highly skilled migration. Addressing these challenges and seizing opportunities for policy alignment, Egypt and the GCC can optimise the benefits of migration, support development goals, and enhance competitiveness in a rapidly changing global labour market. The continued evolution of these policies is crucial in balancing national interests with the rights and aspirations of highly skilled migrants, ensuring that migration contributes positively to the economic and social development objectives of both regions.

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Endnotes

1 The GCC countries include Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates (UAE), however the report focuses on Saudi Arabia, UAE and Qatar.

2 By 2019, these countries collectively hosted over 11% of the global migrant stock (Achy and Awad, 2020).

3 These policies include mandatory quotas for employing nationals, penalties for non-compliance, and reserving specific jobs exclusively for citizens

4 Reservation wage in a term in Labour Economics referring to least/minimum wage at which a worker is willing to accept a job (Kesternich et al., 2022; Caliendo, Lee, & Mahlstedt, 2017)

5 Al Abri (2023) showed that 88.5% of United Arab Emirates population are migrants. The Saudi census conducted in 2022 indicated that Saudi Arabia's total population included 41.6% expatriates, while Al Abri shows that foreign workers represent 76% of Saudi Arabia's labour force. This might give insights on the low rates of employment of nationals in KSA.

6 To manage this demand, GCC countries increasingly rely on bilateral labour agreements (BLAs) and Memorandums of Understanding (MoUs) as tools for regulating labour migration. These agreements provide legal frameworks that align labour migration with local market needs and protect migrant workers' rights. However, while these agreements promote legal migration and strengthen cultural ties, they often lack comprehensive provisions to fully protect the social security and welfare of migrant workers, including specific protections for gender and vulnerable groups (ILO, 2017).

7 Insights are based on interviews conducted with Egyptian highly skilled migrants in the UAE and Saudi Arabia.

8 Insights are based on interviews conducted with Egyptian highly skilled migrants in the UAE and Saudi Arabia.

9 While data on the remittances received by country is no longer available for Egypt, multiple sources show that remittances from the GCC countries are the highest specifically from Saudi Arabia, Qatar, Kuwait and UAE.

10 Saudi Arabia's Labour Market Initiative and Premium Residency Card scheme, the UAE's Golden Visa program, and amendments to citizenship laws

11 Insights are based on interviews with Migration Expert: Ayman Zohry

12 Despite these growing trends, the rate of woman participation is considerably low. The CAPMAS Annual Bulletin on the work permits issued in 2021 showed that women only received 2.2% of the work permits issued that year. In addition, only 2% of the migrants interviewed in the Egypt Household International Migration Survey (HIMS) data of 2013 were women (Eddouss, 2023).

13 Notwithstanding the findings of previous studies indicating that women migrants who return back to Egypt are more skilled that their male counterparts, with respect to both language skills and expertise (Eddouss, 2023).

14 https://ilostat.ilo.org/methods/concepts-and-definitions/classification-occupation/.

15 https://wuzzuf.net/jobs/egypt

16 Forasna serves job seekers in the MENA region who are looking for jobs that do not require any other language than arabic. https://forasna.com/

17 Only three of these job postings indicated "negotiable wages".

18 This aligns with findings from ILO reports, which emphasise the need for improved social protection frameworks for migrant workers in the GCC (ILO, 2023).

19 Insights are based on an interview with the CEO of Pioneers recruitment agency.

20 For example, Qatar's nationalization policy set a target of 50% nationals in the energy sector and 20% in other sectors, but currently, nationals make up only 5% of the workforce. Similarly, in the UAE, despite ambitious "Emiritization" targets, only 3.4% of Emiratis are employed in the private sector, including state-owned enterprises

21 Ten in-depth interviews were conducted with Egyptian professionals in Saudi Arabia and the UAE over the months of September and October 2024.

22 Insights are based on interviews conducted with Egyptian highly skilled migrants in the UAE.

23 Given the previous discussion that medical doctors rely on private networks and private recruitment agencies to secure jobs abroad.

24 These insights are based on media and news, for example, https://www.elaosboa.com/655038/

25 Data from CAPMAS (2019) emphasizes the increase in the rates of highly skilled emigration from Egypt, especially to European countries.

26 https://www.gafi.gov.eg/English/Howcanwehelp/PublishingImages/Pages/Egyptian-Expatriates/EEIU%20E%20flyer.pdf.

27 For example, Egypt could benefit from establishing training and orientation programs similar to those in the Philippines, which equip potential migrants with relevant skills and provide ongoing support during their employment abroad (World Bank, 2019).

28 Insights are based on interviews conducted with Egyptian migration experts: Ayman Zohry and Ibrahim Awad.

29 Ibid.

30 Ibid.

31 Ibid.

32 Saudi Arabia's Vision 2030, Qatar National Vision 2030, and the UAE's Vision 2031.

33 Insights are based on interviews conducted with Egyptian highly skilled migrants in UAE.

34 While job specific skills and language proficiency are more relevant to low-skilled migrants, cultural orientation is relevant to low- and high-skilled migrants. While Arabic is the common language, English is currently used as the professional language even for low-skilled jobs.

35 Insights are based on interviews conducted with Egyptian highly skilled migrants in UAE and Saudi Arabia.

36 Insights are based on interviews conducted with Egyptian highly skilled migrants in the UAE and Saudi Arabia.

37 Insights are based on interviews conducted with Egyptian highly skilled migrants in the UAE and Saudi Arabia.

5

Trends, Patterns, and Policies regarding Highly Skilled Migrant Workers from Pakistan to Saudi Arabia, Qatar and the UAE

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Abstract

Pakistan was among the first South Asian countries to send a substantial number of migrant workers to the Gulf beginning in the 1970s. About 95% of all the registered workers have consistently headed to the Gulf countries, especially Saudi Arabia and the UAE. In terms of skill level, almost half have been classified as low or unskilled, and less than 10% as highly qualified and highly skilled. This paper describes the trends and patterns of highly skilled migrants from Pakistan to three Gulf countries, Saudi Arabia, Qatar, and the UAE. We also assess the government policies and views of academics concerning the outflow of highly skilled workers. Data on trends and characteristics was procured from the Bureau of Emigration and Overseas Employment (BEOE). Among the highly skilled emigrants, the predominant outflows consist of managers, accountants, engineers, teachers, and doctors. In 2023, a total of 862,625 Pakistani workers left the country, including 68,447 (8%) who were highly qualified and highly skilled. Among all emigrants in 2023, 3,486 were doctors, 8,741 were engineers, and 2,979 were computer analysts. As a percentage of the stock of highly skilled workers we found that about 1% of doctors, 3.4% of engineers, and 4.4% of nurses emigrated in 2023. However, the level of unemployment among highly skilled workers was very high as many could not be absorbed in the domestic economy. We recommend enhancing the efforts to upskill the quality of Pakistani workers, especially in the sectors of IT, hospitality, and health care in view of the growing host country demand in these sectors.

Introduction and Background

With a population size of 241.5 million in 2023, Pakistan is the fifth largest country in the world, and its labour force stands among the top ten labour forces worldwide (PBS 2024; GoP 2022–23). Compared to other South Asian countries, Pakistan has a very high rate of population growth (2.55% per year in 2023) accompanied by a highly youthful age structure. In 2020–21, about 71.6 million persons fell in the labour force defined to include those aged 10 and over. According to the 2020–21 Labour Force Survey, about 1.5 million new persons enter the labour force every year.

Pakistan was among the first South Asian countries to send substantial numbers of migrant workers to the Gulf beginning in the 1970s. From 1971- August 2024, a cumulated total of 13.78 million workers left the country after registering with the concerned authorities. Of all the above workers 95.6% headed to one of the six Gulf Cooperation Council (GCC) countries, and more than half consistently fell in the unskilled and semi-skilled occupational categories (Shah 2023). The percentage of highly skilled and highly qualified workers has remained below 10% among all migrant workers during the last ten years.

A vast administrative machinery was established during the 1970s to regularise the outflow of workers. A major component within the organisational structure consists of the Bureau of Emigration and Overseas Employment (BEOE) that collects and publishes statistical data on registered emigrants, regulates the work of the offices that process and approve the work visas, as well as provides pre-departure training for outgoing migrants. The growing demand for foreign workers in the Gulf countries led to the creation of a new cadre of licensed overseas employment promoters (OEPs) whose work was regulated through overall supervision by the BEOE, following the guidelines provided in an Emigration Ordinance promulgated in 1979. In order to scrutinise and regulate the overseas employment demand generated by the OEPs or other channels, emigration protectorates were established all over the country. Currently, the country has 9 protectorates and a total of 2,668 licensed OEPs (BEOE website). In addition to the licensed OEPs, there is a vast network of informal sub-agents who refer potential migrants to the formal agents and channels for employment. The protectorates are required to register the outgoing workers and collect basic information on demographics, occupation, salary, district of origin, etc. Such registration is mandatory if a worker is leaving for a foreign country on a work visa. All information from the protectorates is passed on to a central unit in the BEOE, where a database is maintained of all registered emigrants. Thus, a vast computerised database has been available since 1971 of all registered workers. This database, however, misses those who find jobs and move on their own without going through the BEOE, and this is the case discussed in the next section.

The legislative framework established in 1979 has undergone periodic amendments and revisions. An updated version of the 1979 Emigration Rules was published in 2023 (BEOE 2023). Attempts have also been occasionally made to develop and implement a comprehensive migration policy (GoP 2009; ILO 2013). The most recent effort was made in 2019–20 when a policy document entitled "National Emigration and

Welfare Policy" was prepared and discussed widely among the concerned policymakers, academics, and international bodies. An updated draft of this document was recently released publicly (MOPHRD 2024) and awaits the approval of the cabinet and other concerned bodies. The aim of this policy is to "restructure MOPHRD and revamp its organisations." It gives due importance to the identification of new avenues of emigration for Pakistani workers, both men and women; the automation and digitalisation of emigration processes; and the strengthening and global accreditation and certification of workers' skills. It also focuses on protecting emigrants' rights and promoting their active participation in the socio-economic development of the country. The policy pays special attention to the skill development of the Pakistani labour force, as well as potential emigrant workers, by enhancing the diversification of skills, competencies, employment, and countries of destination. A few strategies to achieve this include language courses such as Japanese, German, and Arabic that potential workers may learn in order to make themselves more marketable. As part of vocational training programmes, some courses are provided in the fields such as hospitality, salon work etc. It recognises the challenges the country faces in terms of future accessibility to GCC labour markets that are becoming "more skill-selective and focused on specific occupations and sectors" (MOPHRD 2024).

Against this backdrop, the overall objective of this paper is to map and describe the policies, trends, and patterns of highly skilled migration from Pakistan to three Gulf countries, namely Saudi Arabia, the United Arab Emirates (UAE), and Qatar. Following a discussion of the methods and data sources used for the analysis, we look at the economic and social impacts of labour migration from the country. We then describe the trends and patterns of highly skilled migration. We look next at the views of policymakers, academics, and the general public regarding the costs, such as brain drain, and benefits of highly skilled migration. We outline the programmes to upskill highly skilled workers before providing some general conclusions.

Definition of "Highly Skilled" and Data Sources

The BEOE collects and publishes information on detailed occupations which are grouped into five major categories: highly qualified, highly skilled, skilled, semi-skilled, and unskilled. The highly qualified and highly skilled categories include the following occupations, and are defined as "highly skilled" in this paper:

Highly qualified = accountant, computer analyst, doctor, engineer, pharmacist

Highly skilled = manager, nurse, teacher

It is well known that migrants to the Gulf region are generally not offered a pathway to citizenship, even though some recent options for long-term residence have become available. We use the terms 'migrant' and 'emigrant' to refer to the workers and their families in the Gulf regardless of the duration for which they have lived there.

Data tabulations of highly skilled workers were requested from the BEOE according to the country of GCC destination and are used for the analysis. It is important to emphasise that the BEOE data include only those migrants who emigrate on a work permit and must register with the Pakistan government's protectorate system. Those who leave on a student visa, or an immigrant visa[1] are not required to register with the BEOE. Also, those Pakistanis who move to the Gulf from third countries are not required to register and are therefore not included by the BEOE database. Finally, those who leave on a visit visa and then find a job in the Gulf are not required to register with the BEOE. Thus, the number of highly skilled migrants reported in this paper is likely to be an underestimate of all Pakistanis who leave the country for overseas employment. Estimates of highly skilled Pakistani migrants to non-Gulf countries are provided by Junaid Ahmed (2024).

An estimate of the stock of highly skilled workers in Pakistan was obtained from government publications and websites of concerned bodies such as the Pakistan Medical Council which issues a license to medical doctors for practicing this occupation. Licensing is required for various highly skilled occupations such as medicine, dentistry, engineering, and nursing. The number of emigrants among various professionals leaving the country in 2023 was compared to the current stock of that profession to estimate the possible loss of skilled persons to the country.

In addition to an analysis of statistical data, an effort was made to gauge the policies and opinions of various sections of Pakistani society about highly skilled migration. Concerned policymakers were interviewed about the existing policies and their opinions regarding the costs and benefits of highly skilled emigration. Five policymakers employed in the Ministry of Overseas Pakistanis and Human Resource Development (Ministry of OP&HRD) were interviewed. Personal interviews were also conducted with six academics involved in migration research. Newspaper articles and

scholarly publications were analysed to assess public opinions about the advantages and disadvantages of highly skilled migration.

Pakistan has been making concerted efforts to upskill its workforce since 2011 and has a goal of providing skills to enhance the employability of all workers. Interviews with four public officials concerned with the training and upskilling of the workforce were held to determine the objectives, scope, and achievements of such upskilling programmes.

Social and Financial Impacts of Emigration to the Gulf

As discussed in the previous section, a significant portion of Pakistan's overall migration landscape is comprised of emigration to the GCC region, exerting wide-ranging financial and social impacts. The inflow of remittances sent home by workers abroad is found to have a direct bearing on their households and even influences the development prospects of their communities (Arif et al. 2020; Mosbah et al. 2019).

Table 1 shows the country and region-wise inflow of remittances to Pakistan during the fiscal year 2023–24 when Pakistan received remittance inflows of USD 30.3 billion. Among the total remittances, Saudi Arabia and the UAE accounted for the two highest sources, comprising 24.5% and 18.3%, respectively, followed by the UK and the USA. Qatar also generated substantial remittances accounting for 3.0% of the total.

As noted by Shah et. al. (2024), more than 50 percent of the remittance inflows are consumed by the workers' families left behind. This mostly includes spending for household sustenance on food, clothing, education, healthcare, housing, marriages, and savings (Suleri and Savage 2006; Arif 2013). In this way, remittance inflows have also served as a tool of poverty-reduction in the country by smoothing out household consumption patterns (Javid et al. 2012; Irfan 2011).

The role of remittances in the country is multi-dimensional and leads to both financial and social development. Migration-induced social change is evident in most of the migrant-sending districts of Pakistan with increased material well-being accompanied by enhanced social status and prestige of the migrant households.

Wassan et al. (2017) observed improved housing among families of migrants working in Saudi Arabia in villages across rural Sindh with many investing in household appliances such as TVs, deep freezers, refrigerators, washing machines, and water motors. Moreover, money sent from the migrant worker is also commonly used in fulfilling social responsibilities by arranging marriage ceremonies for left-behind siblings and/or children.

While emigration of workers from Pakistan has substantially elevated the material wellbeing of the migrant and their families left behind, there appears to be mixed results on the impact of remittances on women and children left behind. Enrollment rates were found to be higher among remittance receiving than non-remittance receiving households according to a survey conducted in the late 1980s (Abbasi and Irfan 1986). In case of children, while increased income from remittances often leads to higher spending on education, the outcomes can differ based on the level of schooling and gender. Khan (2016) observes a rather nuanced situation in Gujarat, where remittances improve school enrolment and performance up to the primary level for both boys and girls. However, beyond this level, the benefits of increased income appear to diminish for boys that may be attributable to father's absence as well as an increased culture of migration among young boys as they aspire to work abroad, especially in Saudi Arabia and other GCC states (Khan 2016; Wassan et al. 2017).

Regarding impacts on health outcomes, Farooq and Iqbal (2015) found that households receiving remittances from abroad are better off in terms of various indicators of health as compared to households receiving remittances from within the country or those who do not receive remittances at all. Another study found that households that receive remittances have children with better nutritional status, better-functioning ability, and better early childhood development as compared to children in non-recipient households (Niazi 2021).

The predominance of males among emigrants from Pakistan to the Gulf states also impacts the left-behind women especially when the migrant is their husband. The decision-making roles and autonomy of left-behind women also show mixed results; those living in nuclear households experienced greater decision-making autonomy as opposed to those who lived in extended families with husband's siblings and parents (Shah and Quddus 2024; Wassan et al. 2017).

Previous research has also reported that migration seems to promote self-employment and entrepreneurship among households of migrant communities especially for return migrants. Since the migration model of the Middle East mostly revolves around temporary migration, these migrant workers, upon return to their homeland, often have enough savings to start a new business in their communities (Iqbal 2015). It has been estimated that a typical Pakistani migrant stays overseas for about six years. Reintegration of returnees is one of the important elements of the Emigration Policy. An example of the reintegration programmes is found in a collaborative effort of the Pakistan government and GIZ to provide tools and cash subsidies to enable certain skilled workers such as electricians and plumbers to aid resettlement in their country. A study by Arif and Irfan (1997) showed that the economic resources gained from overseas employment gave migrants the strength to seek independent employment, and there was a clear move out of the production-service occupations into business and agriculture occupations.

However, it must be noted that while most emigrants to the GCC countries like Saudi Arabia, UAE, and Qatar are categorised as semi-skilled labourers, there is a notable shift during the last two decades or so among these nations seeking highly skilled and qualified migrant workers. This trend presents a challenge for the future of labour migration from Pakistan, highlighting the need for enhanced skill development within the Pakistani workforce to meet the evolving demands of these Gulf states (Shah and Qazi 2024).

Trends and Patterns of Highly Skilled Emigration to KSA, UAE, and Qatar

Of the 13.78 million registered migrant workers who left the country between 1971 and August 2024, about 7 million went to Saudi Arabia, 4.4 million to the UAE, and 0.37 million to Qatar (BEOE 2024). The 2022 Census of Saudi Arabia indicated that a total stock of 1.81 million Pakistani citizens was living in the Kingdom. During the last two decades, less than 10% of all migrants consisted of highly skilled and highly qualified workers (Shah 2023). The distribution of Pakistani migrants by skill level disaggregated according to the three host countries is shown in Table 2 for the last four years, 2020–2023. The total outflows for each of these years to Saudi Arabia were significantly higher than to the UAE and Qatar. In 2023, 426,586 Pakistani workers went to Saudi Arabia, constituting 49.5% of the total outflow. Emigration to Saudi Arabia was about 1.8 times higher than the outflow to the UAE and almost 8 times higher than to Qatar. Also, the total number of migrants to each of the host countries was much higher in 2022–23 than in 2020–21, the two COVID-19 years.

In terms of skill level, the proportion of highly qualified/skilled Pakistani workers among the total outflows in 2023 was significantly larger in the case of the UAE (17.6%) compared with Qatar (6.9%) and Saudi Arabia (1.3%). A likely reason for these differences may be the relative level of infrastructure development with Saudi Arabia requiring more unskilled workers, such as construction workers, compared to the UAE. On the contrary, more than half of all Pakistani emigrants to Saudi Arabia were unskilled compared to 31% emigrants to the UAE and only 15% to Qatar. Thus, the demand for skilled Pakistani workers differed according to the host country in the Gulf. Saudi Arabia employed the largest number of Pakistani workers but the percentage of workers who were highly skilled was markedly lower in Saudi Arabia compared to the UAE and Qatar. A possible reason for the larger outflow of unskilled workers to Saudi Arabia is that of the recent infrastructure expansion plans that require such workers as helpers in various fields.

Among all migrants, the percentage of highly qualified professionals who left the country since 2011 has remained fairly low and stable (Shah et al. 2024). For example, only about 1% or fewer of the outflows comprised engineers and accountants and only about 0.5% of all emigrants were doctors. The only category that seems to have increased in numbers is that of managers, comprising 4.6% of all emigrants in 2023. The category of managers may, however, include a variety of persons employed at varying levels and may not necessarily reflect the exodus of highly skilled Pakistanis. Another group that shows a marked increase in outflow in recent years is that of nurses. From only about 315 in 2013 the number of nurses who left Pakistan in 2023 increased to 4,880. The country suffers from a major shortage of nurses, and the increasing outflow of this occupational group is a cause for concern (Hassan 2023). It is estimated that in general wards of Pakistani hospitals, the current nurse-patient ratio is 1:40, while the Pakistan Nursing Council recommends a nurse-patient ratio of 3:10.

The Potential Stock of Highly Skilled Workers in Pakistan, and Emigration Among Them

We measured the potential stock of highly skilled workers in Pakistan by looking at the enrolment of students at the graduate and post-graduate level, and the number of institutions and teachers providing such education, shown in Table 3 (PBS 2022). Pakistan had 2,462 arts and science colleges in 2019–20, of which 47% were for women. The country had 662 professional colleges, 54 of them for women. There were 131 public universities in Pakistan, 12 of them for women. A total of 3.52 million students were enrolled at various graduate and postgraduate levels; 42% of whom were females. A total of 2.2 million students were enrolled in the arts and science colleges of whom 45% were female. In terms of gender breakdown, women constituted 18% of all those enrolled in professional colleges. Female representation at the university level was, however, fairly high with 43% of all university students. The high level of female participation at the university level is enabled by the possibility of co-education at the university level. A total of 121,901 teachers were employed in colleges and universities with females constituting 39.4% of them.

A majority of higher-level education is provided by the public sector. As reported by the Higher Education Commission, a total of 2.48 million students were enrolled at the post-secondary level in 2020–21, of whom 85% were receiving education in the public sector (HEC 2023).

Student enrolment according to discipline and gender is shown in Table 4 for 2020–21. The largest number of students were enrolled in arts and humanities (700,396), followed by natural sciences and statistics (415,671) and business administration and law (404,445). Women comprised about 67% of students enrolled in education and a little over half in several other disciplines. Disciplines such as engineering, information and communication technologies and business administration and law were dominated by males.

The number of graduates by level of education and gender breakdown is shown in Table 5. A total of 472,824 students graduated in 2020–21, of whom almost half (48.9%) were women. The majority (68%) of graduates completed a bachelor's degree while 21% completed a master's degree. In terms of gender distribution, more males than females graduated at various levels, except the master's degree level; females constituted 61% of all master's degree graduates. About 2,100 students completed a PhD degree. Thus, a fairly large number of persons with above high school degree were added to the labour force in 2020–21.

Estimates of the total stock of highly skilled workers by occupation are presented in Table 6. Two sources provide such data, the Pakistan Bureau of Statistics, and the websites of some of professional councils that issue licenses for the practice of occupations such as medicine, dentistry, nursing, and engineering etc. A total of 315,610 registered doctors and 38,914 dentists were present in Pakistan according to the estimates provided by the Pakistan Medical and Dental Council. About 1.1% of this estimated stock emigrated in 2023, after registering with the BEOE. Of all the registered pharmacists, only about 0.3% emigrated. The percentage of registered nurses and engineers who emigrated was larger, 4.4% and 3.4% respectively. We do not have data on the stock of IT graduates in the country, but their annual production is estimated to be about 25,000 (GoP 2020). Of the above number, about 12% emigrated in 2023. A total of 121,901 teachers were employed at the post-secondary level in 2020–21 and 1,533 emigrated in 2023. The level at which they were employed in the host country, however, cannot be estimated from the existing data in Pakistan.

Unlike highly skilled occupations for which licensing is required, estimates of the stock of managers and accountants are harder to make. Both these categories employ persons with highly varied skill levels. A manager, for example, may be employed in a small enterprise with only a few workers or may hold a high position in a bank or other retail business. Thus, the exceptionally high outflow of managers (39,274) among all skilled workers is difficult to interpret. Similarly, an accountant may be a highly qualified person employed as a chartered accountant or a less qualified person working in a small company with only a few employees. Except for the very high-level accountants, licensing by a formal body is usually not required. A more comprehensive analysis of the above categories requires additional information on the educational level and experience of Pakistanis proceeding overseas as managers or accountants.

Drivers of Emigration from Pakistan

Several factors are likely to serve as drivers of emigration from Pakistan, including the higher levels of income that migrants can earn overseas for employment in similar occupations than the home country, described by Martin (2017) as the wage-wedge. Another major factor is probably the

high level of unemployment, especially among the highly educated, as discussed below. The more competent ones are especially likely to succeed in securing employment in the global market, including the Gulf countries. Proximity to the Gulf region and well-established network connections are also among the factors that are likely to facilitate continued emigration to that region. Additional motivators may include the rising cost of living in Pakistan, as well as socio-political discontent that seems to be increasing. Further research is needed to confirm the relative role that the above factors play in emigration.

Among all workers classified as highly skilled, rather small fractions of various groups emigrated from the country in 2023. Whether the exodus of these workers has created negative impacts on Pakistan's development is questionable, especially in view of some recent research that shows high levels of unemployment among highly educated workers. Findings of the 2020–21 Labour Force Survey indicate that the rate of unemployment was substantially higher among those with graduate degrees compared with the total labour force, 16.1% and 6.3%, respectively (Ahsan and Khan 2023). As shown in Table 7, 23.5% of engineering degree holders were unemployed. A recent report by the Pakistan Engineering Council indicated that more than 100,000 engineers in the country were unemployed (Pakistan Today 2022). Unemployment among female graduates was especially high; 33.8% were unemployed compared with 8.8% among males. About 51.5% of female computer science and 42.6% of engineering graduates were unemployed (Table 7).

A concern about the poor quality of higher education has been expressed by various stakeholders. The Planning Minister recently critcised the higher education institutions for "failing to prepare graduates that meet expectations of employers and industry" leading to high unemployment rates (Kiani 2024). The Minister attributed the poor performance of graduates to a misalignment of the university curricula with industry needs, weak regulatory and quality assurance mechanisms, and substandard research quality. Additional reasons for high levels of unemployment pointed out by Ahsan and Khan (2023) include the surge in higher education facilities following the establishment of the Higher Education Commission in 2002, the inability of the economy to absorb the new graduates, and the concentration of students in fields such as arts and humanities that offer few job opportunities. Among the employers, a senior official of a leading IT firm in Lahore expressed a similar opinion and stated that of the 20–30 thousand IT graduates produced every year, only about 30% are employable and require considerable training on the job (personal interview, senior official of Netsol, August 1, 2024). The State Bank of Pakistan recently raised a concern about the poor quality of IT graduates and stated that only about 10% possessed the necessary skills to secure employment in the industry. A vast majority lacked the competencies needed for the evolving demands of the digital landscape (Hanif 2023).

While it seems that the relatively small outflow of highly skilled workers is unlikely to cause huge brain drain impacts on Pakistan, we must consider the quality of those who are leaving vs. those who are staying behind. A counter-argument that would consider the exodus of highly skilled workers as causing brain drain impediments for the country's development would hold true if the ones who leave are inherently more skilled, innovative, and entrepreneurial. It is likely that the best graduates would find it easier to secure overseas jobs, including the Gulf. Data to judge the quality of the migrant workers is not available to us. We can therefore not determine the extent of brain drain owing to the departure of the highest quality skilled workers. We know, however, that students who perform well at the graduate level have a better chance of finding scholarships and admissions in foreign universities. Furthermore, students from the more affluent families are more likely to afford a foreign education and are therefore more likely to leave the country, in some cases permanently.

Attitudes and Opinions About Highly Skilled Migration Among Various Segments

During the last three years following the Covid-19 pandemic and the fall of the government in April 2022, a widespread debate lamenting a massive brain drain from the country has taken place in the media (Meo and Sultan 2023; Zafar 2021; Siddiqui 2024; Murtaza 2023; Ahmad 2024). Politicians and members of the general public have blamed the political instability, rising cost of living, and declining law and order as some of the factors leading to increased outflow of Pakistanis to other countries. The perception of a "massive" outflow is to some degree based on misinterpretation of the data published by the BEOE. While comparing the two Covid-19 years, 2020–21, with the two following years, 2022–23, it has been argued that the increased annual outflow from about 300,000 to more than 800,000 is a sign of excessive brain drain and a cause for concern. Some writers assume that all the emigrants are highly skilled without taking a closer look at the occupational

breakdown of migrants. We believe that the above argument is faulty since the downturn in outflows during 2020–2021 was primarily a result of the decline in economic activity and virtual bans on worker migration. A second fallacy in the above argument relates to the fact that the trend in the outflow of highly skilled registered workers does not show any unprecedented rise, as discussed in an earlier section (Shah et al. 2024; Shah 2023). The general impression about the desire to leave Pakistan is supported by a nationally representative survey which found that about half of those with above high school education would like to leave the country if given an opportunity (Durr-e-Nayab 2022).

Our interviews with policymakers in the Ministry of OP&HRD generally revealed that they did not see the emigration of highly skilled migrants as a factor that might exert negative impacts on the country's development. Some stated that highly skilled migration not only maximises financial remittance inflows, but it also facilitates brain gain, social status gain among migrant communities and families, and positive social remittances. Consistent with the government policies, various officials stated that the government should not take steps to hinder or inhibit the outflow of highly skilled Pakistani workers. On the contrary, the government should facilitate such outflow. An example of such facilitation exists within the BEOE rules that provide "e-protectorate" services through which a highly skilled worker can obtain online clearance from the concerned protectorate's office without visiting it physically. Furthermore, some officials mentioned that the government should make efforts to diversify the skill level of the workers to make them more competitive and should also try to expand the migrant worker destinations beyond the Gulf countries. The main goal for diversifying the destinations is to reduce dependence on the Gulf region and to increase the total outflows from the country. Except for nurses for whom there is a recognised shortage within Pakistan, highly skilled professionals do not require a No-Objection-Certificate (NOC) from the government. One of the hurdles in up-skilling of professionals such as nurses and doctors, however, is the fact that examinations that enable upward mobility are not held in Pakistan and the candidates must travel to other countries (e. g., Turkey) to take such exams. An example is the exam that enables a physician to take up a residency programme and gain specialised training in the USA.

Among the academics we interviewed, mixed views were expressed on whether the emigration of highly skilled workers constituted a brain drain likely to be harmful to the country's development. Some believed that the exodus of high-quality workers with entrepreneurial skills was harmful to the intellectual growth and development in Pakistan. If the best brains were lost through migration, the capacity for indigenous growth was affected negatively and financial remittance gain did not compensate for the loss. One official described highly skilled migration as a "double-edged sword" with advantages and disadvantages.

Others believed that emigration of the highly skilled was not harmful since "trade is always good" and remittance inflows can uplift the economy. However, some believed that the major problem in Pakistan is the inefficient use of financial remittances that are used largely for consumption and do not contribute sufficiently to economic development. Another concern expressed by some academics was "brain waste" resulting from the emigration of highly skilled workers who could not find jobs commensurate with their qualifications and ended up working in lower-skilled jobs in the host country. Thus, a wide range of opinions exists in the country with regard to the costs and benefits of highly skilled migration. The general perception that an increasing percentage of Pakistanis wish to leave the country is, however, very widespread.

Policies and Programmes to Upskill Highly Skilled Workers

Among the 5 specific aims of Pakistan's draft policy on emigration, skills development, overseas employment promotion, and digitalisation of the emigration process are key goals (MOPHRD 2024). The government has a wide-ranging policy to enhance skills for employability of all entrants to the labour force through diversification of skills, competency-based training, and recognition of prior learning. The country has a broad network of agencies that aims to provide technical and vocational training of various types and duration, funded by the government. Persons who desire to improve their skill level can apply to various programmes and earn a diploma. The primary focus of these programmes is to provide applied training, primarily at the semi-skilled and mid-skilled levels to fulfil the needs of the industry within Pakistan as well as enhance overseas migration. The government is trying to provide training in emerging, cutting-edge, high-tech, as well as conventional technologies. At the post-secondary levels, these programmes provide degrees in Bachelor of Technology, Bachelor of Technology with honours, and Master's degree in Commerce.

A National Vocational and Technical Training Commission (NAVTTC) was established in 2005 to regulate, coordinate,

and oversee vocational and technical training that is imparted at the provincial and district levels in Pakistan. NAVTTC is ensuring the development of customised, country specific training programmes through 10 "Country of Destination Centres" for labour importing countries. The curriculum of such programmes is developed to meet international criteria. Joint programmes for skill recognition of Pakistani workers are also being developed. A recent example of such programmes consists of the "TAKAMOL - NAVTTC Skill Verification Program (SVP)" offering joint certification and testing by the Saudi Arabia Ministry of Human Resources and NAVTTC to enable skilled Pakistani youth to secure employment opportunities in Saudi Arabia. More than 23,000 Pakistani workers have found employment through this joint initiative. The government has also established five Centres of Excellence for technical and vocational training with the assistance of the European Union and GIZ. Another effort to increase the skill level of Pakistani workers is through providing training in languages of countries with high demand for Pakistan labour, including Japanese, Korean, Chinese, Arabic, and German.

Skills upgrading training is provided at the federal level through NAVTTC, and at the provincial level through Technical Vocational Education and Training Authorities (TEVTAs) in each province. It has been recognised that the multiple bodies responsible for providing technical and vocational training in the country suffered from several administrative and coordination problems. The legal framework for such training is complicated by the dual role of the federal and provincial bodies resulting in duplication and fragmentation of effort. In order to streamline the work of the various bodies assigned to provide technical and vocational training, a National TVET Coordination Committee was established in 2011 that held its first meeting on February 15, 2024.

Since 2006, about 600,000 Pakistani workers have been provided vocational and technical training by NAVTTC, a majority in conventional trades. At the higher skilled level, about 65,000 have been trained in high-end trades such as electric engineering, and mobile application development, and 85,000 in high-tech trades such as advanced Python programming and application, artificial intelligence, robotics, etc. NAVTTC has also established ten international accreditation institutes. In an effort to provide highly specialised training to the youth, NAVTTC recently entered into a joint venture agreement with the National Institute of Sciences and Technology to provide specialised training in chip design and manufacturing, keeping in view the global and local needs for developing advanced technical knowledge (Dawn 2024).

Conclusions and Recommendations

According to the latest Labour Force Survey held in 2010–21, about 71.7 million persons were estimated to be economically active (PBS 2022). The labour force participation rate of males and females age 10+ were 67.9 and 21.4, respectively. It has been estimated in the recent labour force surveys that about 1.5 million new workers join the labour force every year.

Pakistan is one of the largest contributors of migrant labour to the Gulf. In 2023, a total of 862 thousand migrant workers left the country after registering with the concerned authorities, about 96% heading to the Gulf region. Saudi Arabia was the largest recipient (49.5%), followed by the UAE (26.7%), while Qatar received 6.4% of all the migrants. Almost half of those who left the country were classified as unskilled and low skilled workers. The percentage of highly qualified and highly skilled migrants has remained below 10% during the last five decades (Shah 2023). As a percentage of the stock of various highly skilled workers in the country, about 1% of doctors, 0.3% of pharmacists, 4.4% of nurses, and 3.4% of engineers left the country in 2023. We do not have reliable estimates of the stock of managers and accountants since these occupations do not require licensing and can span a rather wide range of skills. When disaggregated according to the three destination countries addressed in this paper, a larger percentage of migrants to the UAE were highly skilled compared to Saudi Arabia, about 17.5% vs. 1.4%, respectively.

Whether the exodus of highly skilled migrants leads to brain drain that might exert negative impacts on Pakistan's economy and development is a fairly controversial subject that has received a great deal of attention during the last few years. Our interviews with policy makers, academics, and some highly skilled workers reflected a wide range of opinions. Policy makers in the concerned ministry believed that the government does not have any policies to inhibit the outflow of high skilled workers and should not take any steps to do so. The only occupation that requires a No Objection Certificate (NOC) from the government is that of nursing for which there is a recognised shortage within the country (Hassan 2023). Despite the relative difficulty of obtaining permission to leave the country, the outflow of nurses has registered a marked increase during the last two years and poses a potential cause for concern.

Academics presented mixed views about the pros and cons of highly skilled migration. Some believed that migration of

skilled workers is like trade that is usually a beneficial force in economic growth. Others believed that the departure of the brightest and most entrepreneurial workers had major negative impacts on the development of Pakistan. We do not have information on the quality of highly skilled workers who emigrate to the Gulf, or other countries. It is therefore difficult to estimate the net effect of such exodus on the economic and social development of the country. Some highly renowned economists in the country believe that Pakistani workers lack the skills to contribute to the up gradation of various industries and this is likely to pose a serious challenge to their global competitiveness (Husain 2007).

While it is risky to predict the future of Pakistani migrants to the Gulf, a few policies and initiatives as well as recent trends suggest that a sizeable outflow of workers will continue. In terms of the future of high skilled migration to the three Gulf countries, Pakistan has pro-emigration policies and has been making efforts to enhance the volume of safe, orderly, and regular migration. It holds a fairly high potential, both in terms of new graduates and efforts at up skilling through high level vocational training. About 472,000 Pakistanis earned various graduate degrees in 2020–21, and advanced training courses in IT skills are being provided by various institutions. In terms of collaboration between Pakistan and host countries, advances have been made in terms of skill certification between the Saudi Arabia Ministry of Human Resources Development and the National Vocational and Training Commission in Pakistan that is likely to facilitate emigration to Saudi Arabia.

Despite these possibilities, a few potential hurdles remain. One such hurdle is the low work participation of Pakistani women. Only about 1% of all migrants are women (Shah et al. 2024). Of all the graduates in 2020–21, almost half were women, many of whom are not employed in the labour market. Of all the women who graduate as doctors, for example, about 35% are not active in the labour force (Dawn 2023). At the same time, the unemployment rates of highly educated women, such as engineers and IT specialists are much higher than that of males. Cultural values in Pakistan are not supportive of the migration of unaccompanied women and that may present a hurdle in their overseas employment.

Emigration of Pakistani workers to Saudi Arabia, the UAE, and Qatar has had wide ranging financial as well as socio-cultural impacts on Pakistan. Of all the migrants in 2023, these three countries received 82%, who contributed about 46% of all the remittances sent home by these workers. Highly skilled migrants constituted about 8% of all emigrants in 2023 and the outflow of such workers has shown an upward trend in recent years. About half of adults with a post-secondary education express a desire to leave the country if an opportunity became available. Thus, the future may see an increasing percentage of highly skilled migrants among all those seeking employment in the Gulf.

A few policy recommendations that would help in supporting the pro-emigration policies of the government are as follows. Efforts to further upskill the quality of Pakistani workers must be continued and upgraded. The sectors of IT, health care, and hospitality may be given priority in view of the growing host country demand in these sectors. While NAVTTC is providing training in high-tech trades, Pakistan's workers lag far behind in the IT sector, especially in the light of the global competition. Pakistan has the potential to upskill its workforce in the IT sector, particularly in the fields of software development and coding, cybersecurity, and artificial intelligence as per the requirements of the host country. Recent years have highlighted the importance of the health care professionals, and their demand is further going to increase with an aging global population, hence there is an opportunity for Pakistan to upskill its workers in specialised health care training. Hospitality is another sector witnessing a boom in many host countries, particularly in Saudi Arabia, the UAE, and Qatar and Pakistan could tap into the demand for skilled workers in this area by offering certifications and diplomas in hospitality management.

At the same time, skill certification agreements should be reached with an increasing number of host countries. Moreover, efforts to find employment beyond the Gulf region have not been very successful and must also be accelerated. To this end, bilateral agreements with additional host countries should be signed and progress on them should be followed up on regularly.

Table 1: Country/Region-Wise Remittance Inflows to Pakistan and Percentage Share in Total for Fiscal Year 2023–24

Country/Region	USD (billion)	% share in total inflows
GCC Countries	**16,139.2**	**53.4**
Saudi Arabia	7,424.2	24.5
U.A.E.	5,534.6	18.3
Qatar	901.6	3.0
Bahrain	442.9	1.5
Kuwait	802.1	2.7
Oman	1,033.8	3.4
Other Major Countries	**11,105.3**	**36.7**
USA	3,531.2	11.7
U.K.	4,521.5	14.9
Germany	587.3	1.9
France	481.6	1.6
Spain	600.7	2.0
Italy	978.5	3.2
Greece	404.5	1.3
All Other Countries	**2,527.5**	**8.4**
Total	**30,250.8**	**100.0**

Source: Authors' calculations based on State Bank of Pakistan, Country-wise Workers' Remittances

Table 2: Number and Percentage of Pakistani Emigrants to Saudi Arabia, the UAE and Qatar by Skill Level, 2020–2023

2020

Skill Level	Saudi Arabia		UAE		Qatar	
Total	**136,459**	***(100.0%)***	**53,689**	***(100.0%)***	**7,400**	***(100.0%)***
Highly Qualified	842	*0.62*	3,500	*6.52*	459	*6.20*
Highly Skilled	57	*0.04*	60	*0.11*	38	*0.51*
Skilled	74,980	*54.95*	19,224	*35.81*	3,045	*41.15*
Semi-Skilled	4,422	*3.24*	8,523	*15.87*	1,949	*26.34*
Unskilled	56,158	*41.15*	22,382	*41.69*	1,909	*25.80*

2021

Skill Level	Saudi Arabia		UAE		Qatar	
Total	**155,541**	***(100.0%)***	**27,438**	***(100.0%)***	**37,967**	***(100.0%)***
Highly Qualified	1,523	*0.98*	4,153	*15.14*	1,232	*3.24*
Highly Skilled	143	*0.09*	55	*0.20*	29	*0.08*
Skilled	82,098	*52.78*	9,425	*34.35*	20,895	*55.03*
Semi-Skilled	5,305	*3.41*	3,747	*13.66*	8,153	*21.47*
Unskilled	66,472	*42.74*	10,058	*36.66*	7,658	*20.17*

2022

Skill Level	Saudi Arabia		UAE		Qatar	
Total	**514,601**	***(100.0%)***	**128,471**	***(100.0%)***	**57,966**	***(100.0%)***
Highly Qualified	3,274	*0.62*	20,677	*16.09*	2,963	*5.11*
Highly Skilled	289	*0.04*	354	*0.28*	318	*0.55*
Skilled	226,694	*54.95*	53,932	*41.98*	37,827	*65.26*
Semi-Skilled	32,674	*3.24*	17,712	*13.79*	6,954	*12.00*
Unskilled	251,670	*41.15*	35,796	*27.86*	9,904	*17.09*

2023

Skill Level	Saudi Arabia		UAE		Qatar	
Total	**426,586**	***(100.0%)***	**229,880**	***(100.0%)***	**55,104**	***(100.0%)***
Highly Qualified	5,334	*1.25*	40,198	*17.49*	3,704	*6.72*
Highly Skilled	401	*0.09*	445	*0.19*	116	*0.21*
Skilled	171,048	*40.10*	78,445	*34.12*	38,812	*70.43*
Semi-Skilled	24,987	*5.86*	39,764	*17.30*	4,286	*7.78*
Unskilled	224,816	*52.70*	71,028	*30.90*	8,186	*14.86*

Source: Bureau of Emigration & Overseas Employment (BEOE)

Table 3: Number of Institutions, Students, and Teachers at the Graduate and Post-Graduate Level in Pakistan, 2019–20 (Public Sector Only)

	Institutions		Students		Teachers	
Level	**Total**	**Female**	**Total**	**Female**	**Total**	**Female**
Arts & Science Colleges	2,462	1,150	2,244,100	1,015,400	62,571	27,024
Professional Colleges	662	54	299,467	53,473	19,479	5,160
Universities	131	12	982,559	420,061	39,851	15,808
Total	**3,255**	**1,216**	**3,526,126**	**1,88,934**	**121,901**	**47,992**

Source: Pakistan Bureau of Statistics, 2020

Table 4: Discipline-Wise and Gender-Wise Enrolment at Graduate and Post-Graduate Level, 2020–2021

Discipline	Total	Male (%)	Female (%)
Education	299,803	32.6	67.4
Health & Welfare	178,859	46.0	54.0
Agriculture, Forestry, Fisheries & Veterinary	47,712	80.8	19.2
Engineering, Manufacturing & Construction	166,457	80.9	19.1
Information & Communication Technologies (ICTs)	276,659	73.0	27.0
Natural Sciences & Statistics	415,671	46.4	53.6
Business Administration & Law	404,445	67.9	32.1
Social Sciences, Journalism & Information	248,470	47.1	52.9
Arts & Humanities	700,396	46.4	53.6
Generic Programmes & Qualifications	271,698	55.2	44.8
Services	25,539	56.5	43.5
Other	1,073	66.3	33.7

Source: HEDR Annual Report 2022–23

Table 5: Number of Graduates by Level of Higher Education and Gender, 2020–2021

Higher Education Level	Total	Male	Female
Bachelor	321,563	173,202	148,361
Master	97,748	38,292	59,456
MS/M.Phil.	48,774	27,305	21,469
PGD	2,640	1,567	1,073
PhD	2,099	1,373	726
Total	**472,824**	**241,739**	**231,085**

Source: HEDR Annual Report 2022–23

Table 6: Stock of Highly Qualified and Highly Skilled Persons in Pakistan

Skill/Qualification Level	Number in Pakistan (PSI, 2020)	Number in Pakistan (latest on website)	Number of emigrants (BEOE, 2023)	Percentage of emigrants among the total stock in Pakistan
Doctors	245,987	315,610	3,486	1.10
Dentists	27,360	38,914	-	-
Pharmacists	-	- 55,000	164	0.30
Nurses	116,659	111,474	4,880	4.38
Engineers	17,232*	- 260,000	8,741	3.36
Computer Analysts	-	-	2,979	-
Managers	-	-	39,274	-
Accountant	-	-	7,390	-
Teacher	121,901	-	1,533	1.26**

**Annual number of engineers who graduated in 2020.*

***Percentage of teachers who emigrated is calculated using the stock of teachers as shown in column 1.*

Source: Pakistan Bureau of Statistics 2021, Pakistan Medical and Dental Council, Pakistan Engineering Council, Pakistan Pharmacist Association, Pakistan Nursing & Midwifery Council, Pakistan Bureau of Emigration and Overseas Employment 2023.

Table 7: Unemployment Rate of Graduates by Field of Study, 2020–21

Field of Study	Total	Male	Female
Degree Engineering	23.5	22.2	42.6
Degree Medicine	10.8	6.1	18.4
Degree Computer	22.6	16.7	51.5
Degree Agriculture	29.4	32.1	26.8
Degree in Other Subjects	16.1	8.1	35.2
MPhil/PhD	12.2	6.9	20.2
Total	**16.1**	**8.8**	**33.8**

Source: Ahsan & Khan, 2023

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Endnotes

1 An immigrant visa refers to those Pakistani citizens who have acquired some kind of permanent residence visa for working in another country, such as the USA, Canada, Australia, New Zealand etc. The processing for this type of visa is carried out through the concerned embassy of the host country in Pakistan.

6

India as a Prime Country of Origin for Highly Skilled Migration to the Gulf: Perspectives of A Paradigm Shift in Indian Immigration of Talent to UAE, Saudi Arabia and Qatar

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Abstract

Keeping the objectives of this research report on India as a leading origin country of highly skilled migrants in view, it aims at making innovative policy recommendations away from the stereotypes in Gulf migration literature and discourses. It begins with narratives on Indian immigration to Gulf countries in general and UAE, Saudi Arabia, and Qatar in particular in Section 1. The focus of the literature reviewed is on Indian entrepreneurs and professionals as well as students as the highly skilled immigrants present in three Gulf countries, while acknowledging the predominant character being low and medium skilled workers. Each country is briefly dealt with by addressing their heterogeneities with respect to the majority occupations—entrepreneurs in UAE and professionals in Qatar with a mix of both in Saudi Arabia. Referring to the countries' attempts to break from the conventional restrictive regimes for immigrant labour, workers and their families through reforms proposed in their Vision documents, the mixed responses of the highly skilled migrants are highlighted. Section 2 on Datafication highlights the absence of authentic and systematic data sources. As robust alternatives, data sources on supply of highly skilled are explored, viz., Indian higher education scenario for enrolments and turnout, followed by employment-unemployment scenario that drive their emigration from India. Section 3 mentions drivers on demand side in major destination country labour markets of the global north—referring to their "preference system" and "points system" for selecting immigrants to grant work and family unification visas as well as determining their pathways to permanent residency and citizenship. Section 4 is on relevance of the ILO-ISCO-08 classification for these Gulf countries and exploration of alternative classifications for innovation. Section 5 concludes with recommendations in the Policy Brief.

Introduction[1]

Any serious effort to bridge the gap between theoretical pursuits and practical policy must involve two essential components, namely:

1. Narratives (review of existing/published literature) and
2. Datafication (stocktaking of available statistics and information),

both involving

a. Identification (Definitions) and

b. Measurement (Methodology of applying a Cardinal and/or Ordinal scale),

of variables, followed by Policy Briefs and prescriptions based on

i. Preferences and/or

ii. Judgements,

influencing the decision makers at three levels, viz.,

- Micro (individual/family),
- Meso (institutional/community), and
- Macro (national/state aggregate) level.

This appropriately applies to the present subject at hand, inherent in the task of examining the prospects of a paradigm shift in the world's largest origin country India towards migration to three Gulf countries, transitioning from predominantly low- and medium- skilled to highly skilled, namely, the UAE, Saudi Arabia and Qatar.

Keeping this in view, the objectives of the report are as follows:

1. Commenting on existing research and policy on highly skilled Indian immigration to Gulf countries in general and UAE, Saudi Arabia and Qatar in particular. Referring to interviews with stakeholders including a senior India government official and several activists and policy advocates associated with NGOs and think tanks and a sample of aspirants attending a national daily's webinar on migration of students.

2. Referring to the classes of immigrant admissions in main receiving countries, viz., USA, Canada, UK and EU countries including Germany, Australia, New Zealand, etc. as the drivers of highly skilled immigration in destination-country labour markets (demand determined). Elaborating on India's education-and-employment markets as the origin-country determinants (supply-determined) of highly skilled Indian emigration to UAE, Saudi Arabia and Qatar.

3. Identifying and commenting upon Indian data sources and lack thereof, narrating the Indian government classification of occupations vis-à-vis the ILO's ISCO-08 and commenting upon their utilisation and non-utilisation for Indian manpower planning as well as Indian highly skilled emigration; data sources on emigration of highly skilled migrants, if any, and to look for surrogate data in higher education, and employment markets to derive the perspectives on immigration of highly skilled Indians to several leading countries of the global north and the three aspiring countries in the Gulf, viz., UAE, Saudi Arabia and Qatar. Commenting on the application of various classifications of occupations in India for domestic employment and for migration abroad and suggesting alternative definitions and classifications of highly skilled migrant workers and professionals.

4. Making innovative policy recommendations through Policy Brief for India and the three Gulf countries to actualise a win-win outcome by thinking out of the box, including contemplation on shifts between professional/occupational pathways and the academic routes for migration of international students as future highly skilled migrants.

The Narratives

Although there is a large body of literature addressing Indian migration to Gulf countries, a couple of latest review articles serve the purpose of narratives here quite adequately. One of the most comprehensive pieces of published literature to my mind is a recent article by Bortolazzi and Khan (2023). It refers to the Indian diaspora comprising both naturalised foreign citizens abroad called "Persons of Indian Origin" (PIOs) and Indian citizens abroad termed as "Non-Resident Indians" (NRIs), as presented later in Table 3. This Indian diaspora comprises three subsets of migrants, viz., 'Old Diaspora', 'New Diaspora', and 'Gulf Diaspora'. "Old Diaspora", forming between 1857 and 1947, consisted in an estimated six million migrants under the British colonial system of "Indentured Labour Migration"—moving to French, British and Dutch colonies in Asia, Africa, Latin America. and the Caribbean (Lal 2006). They were predominantly low-skilled migrants becoming citizens of their adopted countries, later called PIOs (Persons of Indian Origin) and granted most civil rights in India but not dual citizenship. "New Diaspora" that began in 1960s and is still continuing as mass migration of India's highly skilled and educated to developed countries of the global north, led to what was called India's brain drain (Khadria 1990, 1999, 2006b, 2007a, 2012a, 2020; Khadria and Leclerc 2006; Rao 2013). "Gulf Diaspora", forming in the post-mid-1970s, now around 9 million migrants, merits its own standing as the fastest growing segment of Indian diaspora constituting India's low and medium skilled NRIs as they were not entitled to naturalise as citizens in Gulf countries which follow the principle of "jus sanguinis" (right of blood) for granting citizenship (Khadria 2005, 2006a, 2010, 2016). The Gulf Cooperation Council (GCC) countries' nationality laws also follow the customary Arab kinship model that relies on patrilineality. Accordingly, only a male national of a GCC state can transmit his nationality by default.

This new wave of mass labour migration to the Gulf was led by the emergence of oil resources in the early 1950–1960s. Indian migrants were preferred because they were cheap, easier to send back, more efficient, obedient and without families to permanently settle (Kapiszewski, 2004). Their greater vulnerability prompted India to enact the Emigration Act of 1983, which is still in vogue. The Act regulating the expanding contractual emigration, has over time transformed from being protective to welfare-enhancing to developmental (Khadria 2006a, 2012a, 2016). Following the Act, the annual volume of Indian emigration to the GCC states had accelerated from 160,000 in 1985 to an astounding 820,000 in 2013. The global economic crisis in 2008 transformed the state-level scenario, with Uttar Pradesh replacing Kerala in ranking first for the outflow of labour migrants, surpassing 226,798 in 2014 (MOIA 2014; MOL 2020; Bortolazi and Khan 2023, 230). Prior to this, a major decline in trend was between 1997 and 1999. This was interpreted to be the result of a majority of GCC states adopting restrictive immigration policies in favour of localisation termed as Kuwaitisation, Saudisation, Emiratisation and Qatarisation (Kumar 2014). Contrarily, the growing trend of emigration in the GCC countries spurred by sustained economic and social changes, rapid urbanisation, better transportation and communication, and the strong Indo-Gulf migration networks in next decade was predicted

to bring more emigration from India (Gurucharan 2013). Despite the predictions, however, NRIs in Gulf region have experienced inequalities compared to NRIs in global north countries ranging from United Stated to Australia, prohibiting them from permanent residency or citizenship as also denying labour rights to social security, purchasing property, and ownership in companies they worked for. This transformed the India-Gulf corridor into a model of "circular migration", characterised by short-term stays and inevitable return to India (Jain 2010).

Notwithstanding these broad generic trends of India's Gulf migration being low and medium skilled, there are exceptions as well as heterogeneities across the three destination countries, indicating presence of highly skilled Indians as per the narratives below.

The Highly Skilled Indians in the UAE

Indian immigrants in UAE also include entrepreneurs and professionals. At the beginning of 21st century, 24% of Indian migrants were 'white-collar' workers in managerial and senior officials' positions, and 10% were professionals (ICWA 2001). They dominated in health, education, management, information technology, media, development, banking and finance, oil, and architectural sectors (Parekh et al., 2003).

Interviews with NRI entrepreneurs had revealed several broad rationales and incentives behind their decision to migrate:

1. The petroleum-based prosperity led Indian businessmen to earn high incomes and profits in textiles, general investments, food and grocery, photography, etc., leading to differences in living standards.

2. Non-pecuniary motivations like improved career opportunities. The UAE allowed them an "Indian lifestyle", with large population of Indians in areas like Bur Dubai, Mina Bazar, Satwa, Deira, Karama, etc.

3. Encouraging opportunities to work in large-scale development projects where there was demand for their capital and talent.

4. Agglomeration and concentration effects of talent attracting talent for engaging in creative research and development, for example in Dubai Internet City, Dubai Media City, Dubai Financial Centre, Dubai Knowledge Village and Dubai Design District, etc.

5. Even if the highly skilled were immune to traditional cultural obstacles such as differences in language, cultural traits, and social behaviour, familiar attributes facilitated preferences of the Indian entrepreneurs towards the UAE.

Overall, liberalisation of economic policies attracted large numbers of those who faced adverse political conditions, bureaucracy and instability back in India. The UAE's tax-free attraction and free economic zones have allowed many to start their own international companies despite increasing anxieties from restrictive immigration laws and introduction of nationality quotas, e. g., UAE aiming to reach an Emiratisation quota of 10% by 2025 as part of the UAE's "Projects of the 50", through a 2% year-on-year increase that began in 2017. A recently published survey-based study by Kanchana (2024) found UAE to be the most welcoming among GCC countries in offering government assistance to 'white-collar' Indian migrant workers, particularly women, providing opportunities to attain visible and influential leadership roles in the expatriate community.

The Highly Skilled Indians in Saudi Arabia

The issue of Indian high-skilled migration to Saudi Arabia has never attracted attention of researchers and policy makers, who otherwise have focused on low-skilled migration (Calabrese, 2020; Rajan and Zachariah, 2020). After the UAE, Saudi Arabia has received the majority share of Indian migrant workers' flows to the Gulf (Figure 2). In 2013, Saudi Arabia received 354,169 Indian migrant workers, i. e., 43.3% of overall 816,665 to the Gulf (MOIA, 2014). Thereafter it continuously declined to 143,000 emigrants by 2019 (MEA, 2020). One significant reason for the decline was the 'Nitaqat' policy announced in 2011. Approximately 2.7 million foreign nationals were deported from Saudi Arabia between April 2013 and August 2018 (De Bel-Air 2018). Nearly, 92,000 Indians with illegal status had registered with the Indian Embassy for emergency certificate to travel back to India in 2013. Of them, 69,800 received the certificate and returned to India (Ramavarman, 2013).

There are many Indian high-skilled workers migrating to Saudi Arabia, but it is not much discussed and researched because of lack of data and their comparatively lower numbers than unskilled migrants. In addition, Vision 2030 of Saudi Arabian government is cited to have ambitious targets to improve employment of natives (HKS, 2019). Whether these reform measures would increase or decrease the demand for high skilled Indian migrant workers is a mixed

conjecture. For example, even if Vision 2030 has targets to enhance the skills of natives, a more extended period is needed to meet the industry's demand for high-skilled workers through domestic supply. In the interim, Saudi Arabia may increasingly depend on high-skilled migrants to satisfy needs of industry as well as to impart higher education and training to the natives. If so, India may be a potential big supplier of the highly skilled, given its large base of higher education and the already demonstrated potential of its knowledge workers in the US and other OECD countries (Majumdar 1983, 1989, 1998; Khadria, 2012b, 2016). The need to prepare the natives for high-skilled technology-oriented jobs would necessitate retaining university teachers in the education sector. The expansion of the education sector in Saudi Arabia, apart from creating many administrative, managerial and accounting jobs for Saudis, would increase demand for foreign higher education teachers including large numbers from India.

The wholesale and retail sector, the second most important employer in Saudi Arabia, also have a higher representation of migrant workers. Almost 80% of employment in wholesale and retail sector was occupied by migrant workers in 2009 (Baldwin-Edwards, 2011). It declined to 77% by 2017 (Hasanov et al. 2021). Further, retail jobs in major sales categories such as clothing, electronics, cosmetics, gold and jewellery, phones and cars have already been reserved for Saudi men and women (Rahman, 2020). Rather, it would be in banking or education or IT and telecom sector that there would be potential for new recruitment and retention of jobs for Indian high-skilled migrant workers. Also, given the demonstrated potential for Indian nurses in neighbouring UAE, their migration to Saudi Arabia too may offer another opportune area (Khadria 2007b; Walton-Roberts and Khadria, 2023).

The Highly Skilled Indians in Qatar

The Second Non-Resident Indian (NRI) Global Summit that took place in Doha in March 2010 and launched the Qatar Chapter of NRI Institute is often cited as a testimony to their expanding visibility in the country. Qatar being primarily an oil-based economy, as compared to UAE, which is more commercial and diversified, is seen to have consolidated a larger white-collar expatriate community of Indian highly skilled and professional workers and a smaller entrepreneurial class. Given that limited literature exists on highly skilled Indians in Qatar, a 2012 publication throws important light on their profile (Kanchana 2012). Though dated, it challenges "the mistaken image of a Gulf migrant to be a blue-collar worker." The fieldwork-based publication found Indian professional-representation predominant in Qatar, in contrast to the entrepreneurial class in UAE. They are mostly engineers, medical professionals, media professionals, information technology specialists—both software and hardware, teachers, chartered accountants, managers, architects, and others - a pool of Indian highly skilled professionals—"talented, multi-skilled and cheaper" visible in the service industry.

As in most of the GCC countries, regionally most Indian highly skilled in Qatar too are from South India. Kerala alone represents more than half and the others are from Andhra Pradesh, Tamil Nadu, and Goa. For the rest of India, they come from Maharashtra, Punjab and Gujarat with newer flow of low-skilled workers from Bihar and Uttar Pradesh. While it is essentially a male-dominated-migration, larger numbers of females are found in Qatar because the white-collar expatriates can bring families. On the occupational side, women are mainly in medical sector as nurses and related professionals and also as secretarial staff. An overlooked segment has also been the second- or the third-generation Indian youth born in Qatar. It is becoming visible as pursuing jobs and enrolling as students in the few fast-mushrooming higher education institutions in Qatar (Kanchana, 2012).

The Indian government has signed agreements on the regulation of employment of Indian manpower with the Government of Qatar which abolished the restrictive Kafala system of sponsorship in 2015. In 2016, an MoU on Cooperation in Skill Development and Recognition of Qualifications was signed. In 2019, Qatar and India completed its fifth Joint Working Group meeting on labour and manpower development in Doha. The year 2019 was also celebrated as India-Qatar Year of Culture. Among organisations that engage in cultural collaboration with India are Museums, Katara Cultural Village, Qatar Posts, and the Qatar Foundation. Several Indian schools in Qatar cater to the Indian Diaspora, for example, Santi Niketan and Delhi Public School in Doha. Apart from providing quality education to the Indian expatriate community in Qatar and focus on Indian culture and civilisation, these schools employ highly skilled Indian migrants in teaching jobs.

The professionals - white-collar Indian expatriates are a publicly visible class in Qatari society. They are dominant as consumers and clients in the marketplace in addition to being the service-provider group across different sectors. A rise in their presence is also noted in the up-scale residential compounds and villas supposedly meant for the "white"

expatriates, e. g. the Americans and Europeans as well as the native Qataris as I had experienced personally while participating in a conference at Georgetown University in Doha in 2016. In addition, large residential compounds of some big employers like Qatar Petroleum, Qatar Gas, RasGas, QAPCO, QASCO, QAFAC, Q-Chem and others show significant expatriate composition. The RasGas residential compound in Al Khor is one such example, where the Indian expatriate group represented nearly 70% of the residents with expatriates in general comprising almost 90%. The residents were mainly managerial executives, technical and other administrative staff and their families. Wide range of facilities from schools, commercial complex, clubs and sports facilities were housed within the compound. Among the schools were an International School following British curriculum and another following India's CBSE-national syllabus.

The social clubs there had their majority members expatriates. Indians inside the compounds are generally organised along their regional and linguistic affiliations, just like outside the compound. It was noted that Malayalees from Kerala and Telugus from Andhra Pradesh were the dominant groups followed by Punjabis and Tamils. One "All-India" group, Bharathi, celebrated national events, e. g. Independence Day. A majority of respondents, both male and female, expressed contentment with living in Qatar, in terms of their social life, security, comforts and facilities of residing in a well-equipped compound.

The Institution of Engineers of India, Qatar (IEI-Qatar Chapter) and the Indian Media Forum-Qatar (IMF-Qatar) are two examples of active and representative professional associations. The IMF is also a forum for Indian professionals in print and electronic media. Numerous similar professional organisations exist such as Institute of Accountants and Financial Professionals in Business and Indian Medical Association and Indian Doctors Club - Qatar Chapter. A significant majority of membership in community associations seem to be from white-collar professionals, and a smaller minority with entrepreneurial background.

Datafication

The above narratives show that the information sources on the demand side in the three Gulf countries for highly skilled Indians are sketchy, ad hoc and not well-structured. Most useful narratives have come from one-time small sample surveys by individual researchers. Strictly speaking, these surveys remain limited as narratives and cannot be extrapolated into systematic and regular datafication. Let us, therefore, investigate the flip side, i. e., supply side of highly skilled potential emigrants in India.

Unfortunately, there is an acute dearth of data on highly skilled emigration from Indian sources as well, more acute than for low skilled emigration, because India, following a laissez faire regime in their outward mobility neither restricts them nor monitors them. Such data are available from destination country sources in the global north who control and monitor their inward mobility—immigration, based on quantity and quality of demand in their own labour markets. Contrarily, in case of immigration of highly skilled Indians to Gulf countries including UAE, Saudi Arabia and Qatar as leading destinations, systematic data are not available even from destination country sources. Any extrapolation therefore from supply side sources in India will ask for looking into production and utilisation of highly skilled graduates in India. For this, we need to look for three kinds of data—1. Enrolments in Indian institutions of higher education including professional courses; 2. Annual outturn of graduates with relevant specialisations and levels of qualifications, and 3. Utilisation and/or underutilisation through employment/unemployment in the country:

The State of Enrolments in India for Supply of High-skilled Labour

The All-India Survey of Higher Education (AISHE) by MHRD, GOI provides five-yearly data on education up to 2021. Table 1 provides several indicators on enrolments and participation in three interdependent levels of education. While the performance of secondary education has been increasing satisfactorily above 76% (3 out of every 4 children enrolled) except for massive dropouts in the post-COVID-19 period in 2022 over 2021, that in higher education has increased steadily but reached only the low level of 27.3% (substantially lower than global average 36.7% (see Note 1 in Table 1). India's pupil-teacher ratio too in higher education is significantly higher than the average for lower middle-income countries. With 24 students per teacher, India ranks below countries like Brazil and China where the ratio is close to 19:1 (Note 2 in Table 1).

In 2020, India adopted the new National Education Policy 2020 (NEP 2020), the previous two being in 1968 and 1986 (MHRD 2020). It aims to pave the way for transformational reforms in school and higher/tertiary education in the country. India's higher education system is the world's third largest with more than 1,082 accredited universities

Table 1: Gross Enrolment Ratio (GER) (Ref NEP Target: 50% in Higher Education by 2035) and Pupil-Teacher Ratio (PTR) in Higher Education vis-à-vis Secondary & Primary Education

Year	Higher Education (Age group 19–23 years)		Secondary Education (Age group 14–18 years)		Primary Education (Age group 6–14 years)	
	GER	PTR	GER	PTR	GER	PTR
2018	25.8	29	n. a.	n. a.	n. a.	n. a.
2019	26.3	26	76.9	20.6	101.3	27.7
2020	27.1	26	77.9	18.5	102.7	26.5
2021	27.3	24	79.8	18.4	103.3	26.3
2022	n. a.	n. a.	79.6	17.6	103.4	26.2

Notes:
1.https://www.google.com/search?q=Higher+education+ger+of+lower+middle+income+countries&rlz=1C1UEAD
*2.https://www.google.com/search?q=higher+education+pupil-teacher+ratio+India+and+lower+middle+income+countries&sca_*

Sources: Author, based on GOI, Ministry of Education: (i) AISHE 2019–20; 2020–21 (ii) Higher Education Profile 2019–20; (iii) Unified District Information System for Education Plus (USIDE+) 2021–22 and previous annual issues till 2018–19.

Table 2: No. of Major Universities in India, 2016–2021

Type	Number of Universities					
	2015–16	2016–17	2017–18	2018–19	2019–20	2020–21
State Public University	329	345	351	371	386	403
State Private University	197	233	262	304	327	365
Deemed University- Private	79	79	80	80	80	80
Institute of National Importance	75	100	101	127	135	149
Central University	43	44	45	46	48	51
Deemed University-Government	32	33	33	34	36	34
TOTAL	**755**	**834**	**872**	**962**	**1012**	**1082**

Source: AISHE 2019–20; 1920–21

(see Table 2). For technical education, a total of 3500 engineering colleges, 3,400 polytechnics, and 200 design and architecture schools exist in India (AICTE 2021). Among engineering colleges, Indian Institutes of Technology (IITs) are recognised the world over. Initially six in the 1960s, established through collaboration with developed countries, and presently 23, the IITs train professional engineers ranked among the best and the brightest the world over. Now,

India can think of reciprocating by establishing more IITs in the three Gulf countries after the first one recently established in Abu Dhabi. There is a tough competition to qualify for admission through the test called Joint Entrance Examination (JEE), which requires intense preparation for years, often in coaching institutions spread all over the country, and some in the so-called coaching cities (see Box 1 in Policy Brief). Known by the acronym IIT which has become a global brand name, their graduates are recognised to have been the backbone of NASA and founders of the Silicon Valley and source of startup innovations including solving of the dreaded Y2K problem. Twenty-five to 30% of their out-turn comprising the best ones are estimated to have been lost to brain drain from India as per the Department of Science and Technology surveys (Khadria1999). Recently, Germany has increased the quota for Indian highly skilled migrants from 20,000 per year to 90,000 per year. There are more than 600 medical colleges and 5,000 nursing institutions but all are short of seats to educate and train the eligible aspirants - as per Medical Council of India (MCI) and Indian Nursing Council (INC) data.

Out-turn of Highly Skilled Graduates from Higher Education Institutions in India

As per the latest All India Survey of Higher Education (Tables 34 and 36 in AISHE 2020–21), the total number of pass-outs increased to 9.54 million in 2020–21, up from 9.4 million in 2019–20. At undergraduate level, highest out-turn was in Bachelor of Arts (B.A.) with 2.05 million, with 44.4% males and 55.6% females, followed by Bachelor of Science (B.Sc.) with 1.13 million, Bachelor of Commerce (B.Com.) with 1.02 million and 830,000 in Bachelor of Engineering (B.E.) and Bachelor of Technology (B. Tech.) combined. At post-graduate level, highest out-turn was in Master of Arts (M.A.) 540,000, followed by Master of Science (M.Sc.) 290,000, Master of Business Administration (MBA) 220,000 and Master of Commerce (M.Com.) 160,000. In Diploma courses, total number of pass-outs was 848,000. In 2020, Ph.D. degrees were awarded to 25,550 students, with 14,422 male and 11,128 females. The Ph.D. in Science were awarded to 6,022 candidates, followed by 4,556 in Engineering & Technology.

Employment Scenario for Highly Skilled Graduates in India

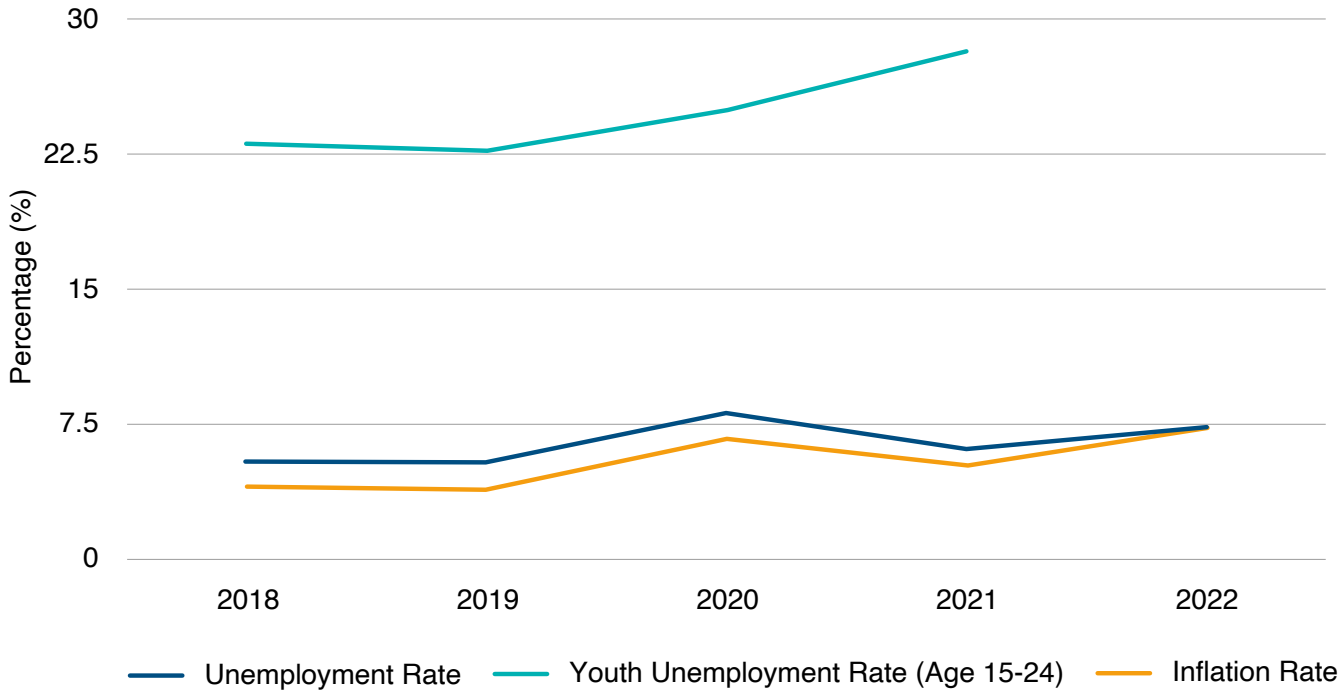
Soon after NEP 2020 was adopted, which preceded the AISHE 2020–21 depicting the above scenarios of enrolments and out-turn of graduates, the Association of Indian Universities (AIU 2021), the autonomous government think tank published an edited volume, *Reimagining Indian Universities* containing the collective wisdom of leading academia of the country on what ailed higher education in India. In terms of Gross Enrolment Ratio (GER) in higher education, the country, belonging to Lower Middle-Income Group, stood at about 27 per cent, which the AIU (2021) pointed out was far lower than the GER for most developed countries and less than the average GER of 50% in many developing countries in Upper Middle-Income Group.

The most relevant finding underlying such discourses highlights the mismatch between India's "Education" and "Employment" scenarios, leading to high aspirations in the "Emigration" scenario. With a target of 50% GER by 2035 in NEP 2020, there is still a huge deficit of numbers of higher education institutions, and the Indian universities are seen grappling with five challenges of Enrolment, Excellence, Equity, Employability and Entrepreneurship. Enrolment, Excellence and Equity are a massive *demographic challenge* of access to higher education in India as there are gross inequities of rural-urban, rich-poor, and the so-called upper castes versus the socially and economically challenged classes of population (Khadria 2024). On the other hand, employability and entrepreneurship pose a big *challenge of employment* for all groups.

The education and skill levels of fresh graduates prepare them for transition "from school to work" in the labour market. For this, one needs to assess employment prospects for the highly skilled within India. Figure 1 presents unemployment levels vis-à-vis inflation in India. Youth unemployment, which is synonymous with graduate unemployment in India was approaching 30% in 2021 whereas the general unemployment and inflation rates were hovering around 7.5 per cent. This reflects a dismal situation for highly skilled graduates coming out of universities and facing long periods of desperate job search.

According to *India Employment Report 2024* (ILO 2024) overall growth of services employment fell from 2.7% between 2012 and 2019 to 1.1% during 2019–22. Most employment growth in tertiary sectors occurred in business, finance, real estate, health, education, communications and hotels and restaurants between 2000 and 2019. However, there were changes in different services subsectors afterward, in 2019–2022. Specifically, employment in trade, hotels and restaurants as well as transport, storage and communications services increased, while employment in financial, real estate and business services as well as public administration, education, health and other services declined.

Figure 1: Rates of Unemployment, Youth Unemployment and Inflation, 2018–2022



Source: Centre for Monitoring Indian Economy (CMIE) data; constructed by Author.

Although youths are more likely to be employed in industry or services and more likely to be in regular wage employment and in high-skill jobs, the quality and condition of employment among them are poorer when compared to adults. They are more likely to be engaged in self-employed unpaid family work and casual wage work and be involved in informal/casual work in unorganised sector or in "gig economy," like Uber, Lyft, Airbnb, TaskRabbit, Zomato etc., offering lower wages or uncertain earnings (Harris 2017). The increasing prevalence of informality and temporary jobs in regular salaried employment raises their propensity to migrate abroad.

The unemployment rate among youths with technical degrees or graduate diploma was even higher than among general graduates and had increased over time. In 2022, it was highest at 31.1 per cent, closely followed by technical diploma holders at 29.4 per cent. This indicates that the challenges faced by youths having higher and technical qualifications in finding suitable employment opportunities grew with their length of education level of skills.

With increase in educational attainment among youths, a disturbing feature of labour market that emerged is the large imbalance between demand for jobs by youths and their supply, leading not only to higher levels of unemployment and longer waiting periods but also to the educated youths with graduate degrees or higher qualifications readjusting their expectations to take up jobs for which they would otherwise be treated as overqualified. This is most manifested in low-grade public sector jobs, where the eligibility qualifications are a primary education or, at most, secondary level of education. As a result, job advertisements attract up to several hundred thousand applicants, many of whom have a graduate or postgraduate degree, an engineering graduate degree and even PhD—with prospects of large-scale deskilling. The explosive gap between qualifications and aspirations and jobs has also been leading to discontent and massive protests. While these examples are common in somewhat low performing states, they have also been reported from the more economically robust states, fanning tendencies for mass graduate emigration.

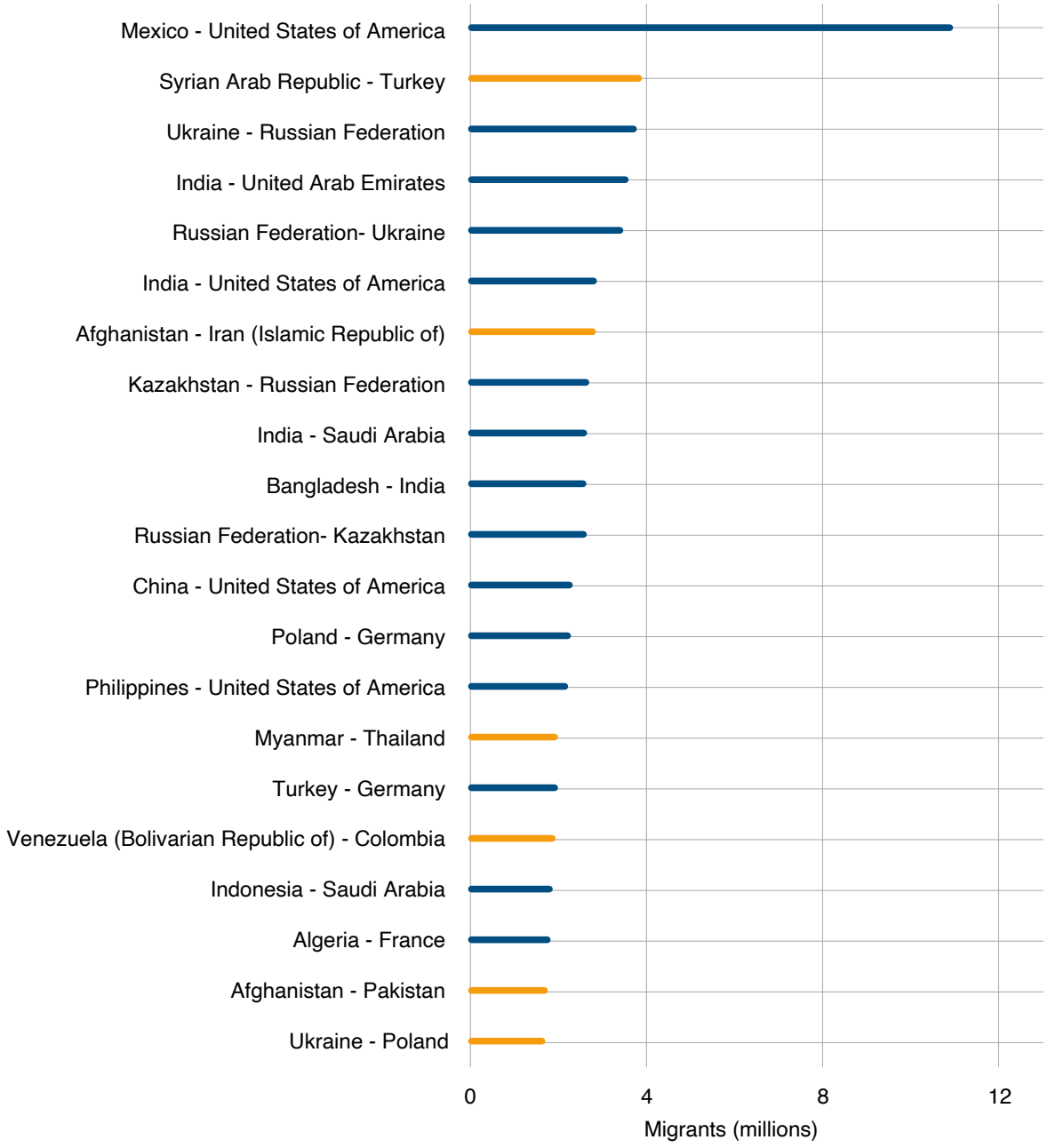
On Emigration of the Highly Skilled from India

Unlike the availability of disaggregated data on education and employment of highly skilled in India, up-to-date and disaggregated emigration data are not available. Even international agency sources like UN, ILO, IOM etc. provide only broad aggregates, not classified by education levels, occupation, income and so on that could be useful for policy planning purposes. For example, Figure 2, as presented in *World Migration Report 2024,* shows stocks of migrants born in India and residing in the UAE and Saudi Arabia among the top 20 bilateral corridors of the world. Excepting the largest Mexico-USA as 1st, India-UAE is in 4th position and India-Saudi Arabia in 9th, with India-USA in the 6th position in-between in terms of quantitative numbers. Such stock figures do not tell us about annual flows of migration nor their breakup by education or skill levels, occupations, and income levels.

Figure 2: Top Bilateral Corridors of Migration, 2024

Note: Orange bars represent displaced persons.

Source: World Migration Report 2024, based on UN DESA 2021. International Migrant Stock 2020. New York and UNHCR 2023. Global Trends: Forced Displacement in 2022.



International migration data are primarily gathered from immigration statistics of destination countries with border controls for entry (Calabrese 2020, Khadria and Mishra 2021). India as an origin country does not exercise border control on exit of highly skilled emigrants, but only on low and medium skilled emigrants who come under the purview of the Protectorate of Emigrants (POE). Similarly, existing studies and surveys, such as the Kerala Migration Survey (KMS) 2023 also do not focus on highly skilled migrants, excepting nurses who come under POE. As a result, India lacks destination-specific data on the emigration of its high-skilled workforce by education, occupation, and income to the global north, not to speak of Gulf countries.

Indian Diaspora and the Brain Drain Debate

India's High-Level Committee on Indian Diaspora (ICWA 2001) had collected broad data of 20 million global Indian diaspora and calculated their percentage shares in destination countries/regions at the turn of century. This had firmly consolidated the transition in the Indian debate on highly skilled emigration through three phases of Brain Drain to Brain Bank to Brain Gain (Khadria 1999, 2007a, 2009b, 2012b). These phases have evolved through the perspectives of macro level drain/losses of investment in education and/or the embodied skills; the meso-level involvement of international organisations and financial institutions; and micro-level guilt consciousness among migrants about deserting the motherland - all leading to policy debates on compensation by destination countries. The debate ranges from the discourses on the "Brain Drain Tax" that Bhagwati and Partington (1976) had proposed, to Brain Bank that Indian Prime Minister Rajeev Gandhi provided for dependence on highly skilled Indians abroad in times of recession and other emergencies in their homeland; to Brain Gain with Remittances from emigrants pouring into the country at world record levels, and investments (DFI) from the PIOs being lured with the so-called "single-window" for government clearances without the bureaucratic red-tape. I have called the drivers of the micro-determinants at the individual and family-level decisions through these phases as the stereotypes of 3M - Money for Remittances, Machines for Transfer of Embodied Technology, and Man-hours for Return Migration in

Table 3: NRIs, PIOs and Indians Overseas, 2023

County	NRIs (Indian Citizen)	PIOs (Foreign Citizen)	Overseas Indians
UAE	**3,554,274**	**14,574**	**3,568,848**
Saudi Arabia	**2,460,603**	**2,906**	**2,463,509**
Qatar	**835,175**	**1,609**	**836,784**
Kuwait	993,284	2,244	995,528
Oman	684,771	1,864	686,635
Bahrain	323,908	3,899	327,807
GCC	**8,852,015**	**27,096**	**8,879,121**
Malaysia	163,127	2,751,000	2,914,127
Singapore	350,000	300,000	650,000
USA	2,077,158	3,331,904	5,409,062
Canada	1,016,274	1,859,680	2,875,954
UK	369,000	1,495,318	1,864,318
Australia	350,000	626,000	976,000
New Zealand	150,000	120,000	270,000
Germany	208,000	52,864	260,864
WORLD	**15,850,612**	**19,571,375**	**35,421,987**

Source: Author, using MEA 2023. Last updated online: 21/5/2024

the neoclassical framework of the existing policy literature (Khadria 1999), and proposed an alternative or complementary political economy framework of macro determinants involving what I called "a trinity of dynamic conflicts of interests" of "age-wage-vintage" between the destination and origin countries (Khadria 2009a). The trinity implied the preferences of destination countries in recruiting younger workers over older migrants, in engaging them for temporary work with lower wage-package, and in enrolling tertiary-level international students as future workers embodying the high-level skills and knowledge of a future vintage (Khadria 2009b).

Driven by the mix of these determinants, the 20 million global Indian Diaspora at the turn of the century has presently grown to reach the world's highest level of 35 million, comprising 16 million NRI migrants and 19 million PIOs. According to the United Nations Department of Economic and Social Affairs (UN DESA 2019), NRIs numbered 17.5 million in 2018 forming the world's largest diaspora. The PIOs are citizens of their respective destination countries of residence, either by naturalisation or by descent, some of them holding Overseas Citizenship of India (OCI), which is sort of a semi-dual citizenship with entry and other rights in India as their ancestral homeland of three generations. India's Ministry of External Affairs (MEA, which has subsumed the erstwhile Ministry of Overseas Indian Affairs - MOIA), annually publishes these stock data of the country's population overseas divided into two categories, viz., Non-Resident Indians (NRIs) who continue to be Indian citizens, and Persons of Indian Origin (PIOs) who have become foreign citizens. Apart from the world totals, Table 3 presents six GCC countries and a few global north countries where substantial numbers of the two categories of overseas Indian population reside as of 2023. The distinction between the two categories of Indian diaspora is that the Gulf migrants are predominantly NRIs whereas those in global north countries are increasingly the PIOs. The former are under Indian legal regime whereas the latter are no longer so. How did this bifurcation begin and how it evolved is being addressed in the next section.

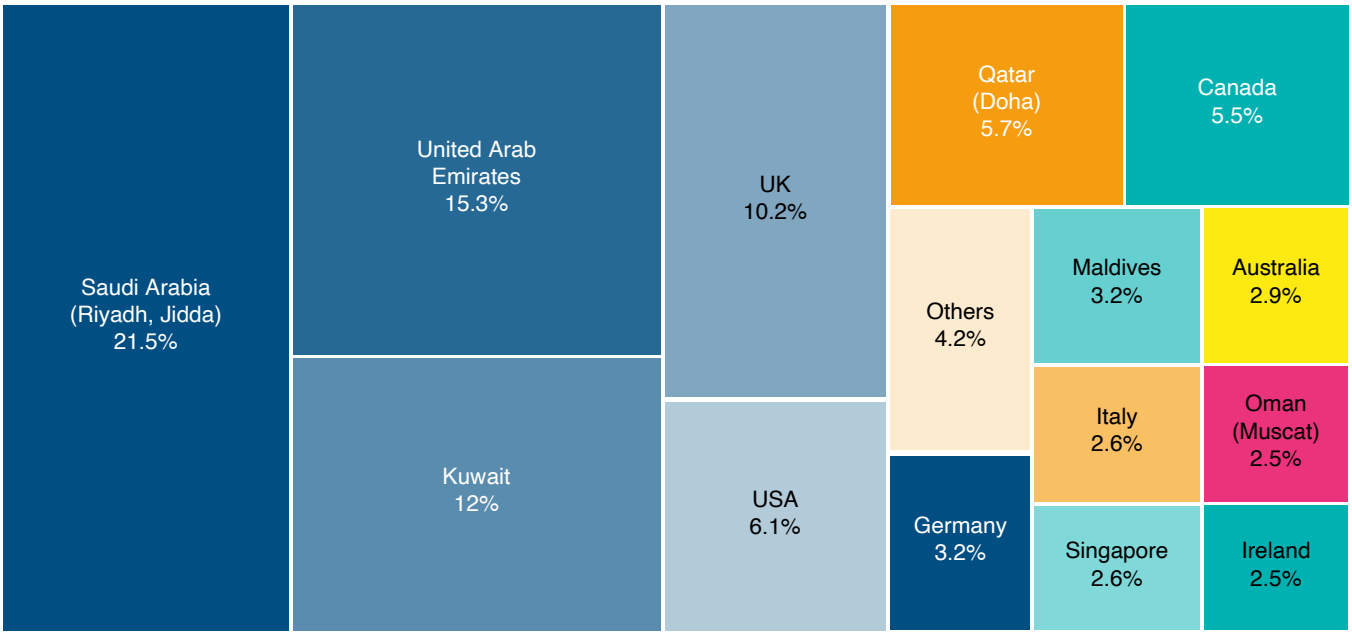
Between Emigration Checks and Laissez Faire: The Trends and Drivers of Indian Exit Regimes

India had faced acute graduate unemployment of doctors, lawyers, accountants, architects etc. with long waiting periods before they got suitable jobs within the country (Blaug et al 1969). This led to brain drain of Indian doctors to United Kingdom to fill the gaps in NHS (National Health Service) created by brain drain of the British doctors to the USA (Khadria, 1999). Initially, when this brain drain of doctors swelled, India introduced exit controls such as financial bonds and quantitative quotas to retain or retrieve the doctors educated by the taxpayers' money in government funded institutions. However, these measures were ineffective as the aspirants as well as the foreign employers found ways to circumvent them (Khadria 2002, 2007a). Next followed unemployment of engineers, leading to deskilling of the so-called IIT-ians, the graduates of the celebrated Indian Institutes of Technology (IITs) as marketing agents "selling soaps," when NASA (National Aeronautics and Space Agency) attracted them *en masse* to the US. Having failed with schemes like "TOKTEN" and "Pool Officers" to bring them back, India adopted a laissez faire regime of there being neither control nor encouragement of the highly educated and skilled for emigration to other countries - including those who had studied in publicly funded subsidised higher education, allowing them to give up Indian citizenship to naturalise as foreign citizens.

Thus, the main outflows of India's high-skill emigration were not controlled by its supply-side drivers in India even if classified by the ILO's ISCO-08 classification or its Indian variant whether in short supply or surplus. They were primarily demand-determined by the immigration systems of the countries of destination—either the "Preference System" of the USA or "Points System" of other countries (Canada, UK, EU e. g., Germany, Australia, New Zealand and so on), but all of them using their own uniquely tailored definitions by labour market demand in various classes of occupations to provide admission, work authorisation and/or stay in the country, based on family unification and/or labour market requirements as per their own socio-economic criteria.

When it came to emigration of labour to Gulf countries, India followed a dual system of control and monitoring of low and medium skilled migration through what is called the ECR (Emigration Clearance Required) Passports. The counterpart highly skilled emigrants like the doctors, engineers, IT professionals and so on were to continue under the laissez faire regime through what were called ECNR (Emigration Clearance Not Required) Passports (Khadria 2004a, 2004b). The Emigration Clearance to ECR passport holders was granted by Protectorate of Emigrants (POE) offices under Emigration Act of 1983 which provided legal framework to regulate this emigration. An Emigration Bill 2023, amending Emigration Act 1983 has been

Figure 3: Destination Wise Distribution of 20 Thousand + Nurses from Kerala, 2016



Source: WHO (2017).

pending before the Indian Parliament to pass into an Act. However, proposed reforms like introduction of the online e-Migrate Portal now already facilitates low and medium skilled workers to get emigration clearances and track their immigration status instead of ECR/ECNR passports. It prevents exploitation by recruitment agents and unregistered sub-agents.

Even migration of some categories of highly skilled vulnerable migrants like young nurses under a specified age are also controlled by subjecting them to clearance in case of emigration to the listed countries other than the global north countries. Data are scarce and dated, but according to a WHO source of 2017, among the 30% educated and white-collar workers, a dominant part of highly skilled Indian diaspora comprises qualified Indian nurses from Kerala state, working primarily in Saudi Arabia, UAE, Kuwait, Qatar and Oman, who form a significant proportion of internationally educated nurses working overseas. Figure 3 provides a bird's-eye-view of the relative shares of various destinations where 20,622 nurses from Kerala were located in 2016 (WHO 2017). It shows that Saudi Arabia (21.5%) and UAE (15.3%) host a higher share of these professionals than the UK (10.2%) and the USA (6.1%), while Qatar's share (5.7%) also dominates that of other countries.

Relevance and Alternatives to ILO's ISCO-08 for Highly Skilled Migration from India to the Gulf

The pertinent question that arises from the above narratives and datafication relevant to the three Gulf countries, which envision themselves as major "hubs" of highly skilled immigration by 2030 is: What pathways for selecting the highly skilled Indian immigrants in desirable occupational categories, and granting them the relevant visas and work authorisation, would be appropriate? The choices before them in answering the question are US model of "preferences" with annual quotas, and "points system" followed by most other countries—some EU countries, Canada, UK, Australia, and New Zealand. Both have a duality for family reunification and labour market requirement, leaving aside humanitarian and ethnic representation in the population as non-labour market-related pathways. Family reunification subsumes labour market requirements because spouses and children and some relatives of the primary immigrant are granted work authorisation to fulfil labour market requirements of employers in destination country, apart from satisfying primary migrant workers' necessity of being accompanied by immediate family.

Having chosen their respective model, the three Gulf countries would be called upon to assign types of preferences or levels of points to the educational qualifications, the

occupations and income levels of the target immigrants. The three countries must set their respective priorities for granting the eligibility to the relevant classes of admissions into the country and then being issued appropriate type of visa, e. g., the recently introduced "Golden Visa" linked to the conditions for entry and residency rights by length of stay in the country - whether permanent or temporary, and whether with pathways to citizenship or not. It is here that the relevance or non-relevance of the ILO-ISCO-08 Classification of Occupations and its top three tiers of occupational positions could come into the picture. It is here that one needs to understand whether India uses the ILO ISCO-08 classification for (i) its manpower planning for its domestic labour market, and (ii) for planning the governance and management of emigration of its highly skilled migrant workers to global labour market abroad.

One nuanced answer to both these questions is that India does neither and hence could not be emulated by any of the three Gulf countries. What India does with the ILO ISCO -08 classification or its national version, the NCO-2016 is to utilise the classification not for offering jobs or placement to its working age population *ex ante*, but to enumerate the labour force for stocktaking *ex post*, for example, for Census, i. e., after the workers have chosen and opted for selection and were appointed and employed.

The question remains as to what an alternative classification for planning and management of highly skilled Indian immigration to the three Gulf countries ex ante could be. As a viable alternative, I would call the relevant three top categories of ISCO-08 occupations the "knowledge workers" *a la* Peter Drucker (1963). The futurologist economist and management guru is often quoted to have said in his later book: "The most valuable assets of the 20th century company were its production equipment. The most valuable asset of a 21st century institution whether business or non-business, *will be its knowledge workers and their productivity*." (Drucker 2001, emphasis added). It is primarily the knowledge workers who have been migrating from India to the destination "hubs" in the Global North countries, those comprising the "brain drain" to the developed countries, the USA, and other OECD member states like UK, Canada, European Union countries, Australia, New Zealand and so on since the mid twentieth century. Thus, India has traditionally remained the world's largest "hinterland" of origin of global migrants comprising the highly educated and qualified "Knowledge Workers" to the developed countries of the Global North—thereby being at the centre of the "brain drain" debate in the South-North migration (Khadria, 1999); and the low and semi-skilled "Service Workers" to the six GCC countries since the 1970s within the Global south as the South-South migration, sometimes termed as the "brawn drain" (Lal 2006, Khadria 2006).

Human resources can be defined in various ways but one way is by what I describe in Figure 4 to be an "occupation-tied career-specific occupations" (the left-most column) as employees vide ILO's ISCO-08 and another, a lesser known but more profound, "occupation-wide generic occupations" (the right-most column)—the ISCO-08's three earmarked categories, viz., Managers, Professionals and Supervisors - based on their generic contributions to the destination country's envisioned development process. Only these categories in either classification of occupations would comprise the human capital that answers what we understand by highly skilled labour or workforce, alternatively classified as Human Resources in Science and Technology by Occupations (HRSTO, akin to the ILO classification) and Human Resources in Science and Technology by Education (HRSTE, akin to UNESCO classification) in the OECD (following the Frascati & Canberra Manuals), and as Science and Engineering (S&E) manpower in the US-NSF (National Science Foundation). Figure 4 elaborates this classification and the alternative/evolving nomenclature of the highly skilled human capital that could be applied to migrant entrepreneurs, professionals, and students.

Thus, whereas both knowledge workers and service workers form essential parts of human resources, it is only the knowledge workers who comprise highly skilled human capital, akin to OECD's HRST (Human Resources in Science and Technology) and USA-NSF's S&E (Science and Engineering) data on personnel in the labour force, corresponding, more or less, to the first three Code-Levels of ILO ISCO-08 classification as well as of India's National Classification of Occupations (NCO), involving varying types and levels of education - knowledge, experience, training - and associated activity as listed in Figure 4. It is actually a combination of two factors of production—labour and capital, the latter invested in the education (HRSTE), training and health of labour that contributes to higher average productivity of highly-skilled labour, measured in purchasing power parity (PPP) dollars, as per-employee per-hour contribution to the Gross Domestic Product. The term 'knowledge workers' has now undergone transformation with the top layers becoming synonymous with what is presently called the STEM (science, technology, engineering, and mathematics/medicine) professionals,

Figure 4: The Global Divide of Labour

Occupation-tied Career-specific Occupations	*Education*	*Knowledge*	*Experience*	*Training*	*Activity*	*Occupation-wide Generic Occupation*
Knowledge Workers: Destination Developed West (OECD's HRST; equiv. S&E in the US)						
Executives, Supervisors	Third Level Business	1	3	2	Management, Organisation	**Managers (ILO-1) HRSTO: CEO, MD, Accountant**
Scientists, Engineers	Third Level R & D	3	3	3	Invention, Innovation	**Professional (ILO-2) HRSTO: Engineer, Teacher, Nurse**
Educators, Trainers	Third Level S & T	3	2	1	Communication, Transformation	**Supervisors (ILO-3) (HRSTE): Administrator, PG Student**
Service Workers: Destination Gulf (UAE, Saudi Arabia, Qatar etc)						
Semi-Profsnls, Technicians, Craftsmen	Second Level – Vocational	1	1	2	Facilitation, Operation, Production, Construction	**Operators (ILO-4, 5, 6, 7, 8)**
Semi-skilled, Unskilled	First Level – Literacy	1	1	1	Cleaning, Maintenance, Elementary activities	**Labourers (ILO-9)**
***Knowledge:* Know-why**			***Experience:* Do-how**			***Training:* Know-how**

Note: *The numbers 1, 2, 3 indicate three ascending-level alternative requirements of each of the three components of Knowledge, Experience and Training.*

varyingly affected by the brain drain (Khadria 2020). The new vocabulary for educational planning in India as in the global north countries is that of the STEM fields. In migration context, whether to the Gulf or to the global north countries, however, India continues to use the "occupation-tied career-specific" classification of occupations. Perhaps it would be pertinent for the three Gulf countries, viz. UAE, Saudi Arabia and Qatar to jointly initiate the practice of the "occupation-wide generic" classification of occupations as new or fresh thinking out of the box for the purpose of the paradigm shift from low-skilled to high-skilled Indian immigration to the Gulf as an opportunity of innovation in migration governance and management away from the stereotypes.

Views of Indian Policy Makers, Academics, Civil Society Advocates and Students interviewed

As mentioned earlier, India follows a laissez faire regime for emigration of its highly skilled, including professionals and students. Therefore, India neither regulates nor controls this migration excepting when any emergency arises which are more regular and rampant in the case of low and medium skilled migrants, particularly to the Gulf countries. A senior government official of the rank of Additional Secretary in the Ministry of External Affairs (MEA, which now also hosts the erstwhile MOIA) and holding the position of authority was interviewed informally. The official opined that India's emigration policy is focused on the protection and welfare of the vulnerable categories of migrants in the low and medium skilled categories, not highly skilled who are assumed to be capable to look after their interest and welfare in host countries.

I also interacted with a small number of academics and civil society policy advisors engaged in migration research and policy advocacy in three related fields at universities and research institutes, viz.: (1) IGNOU and OP Jindal Global University, Indian Council of World Affairs (ICWA) which now houses the erstwhile ICM, and Association of Indian Universities (AIU) which gathers data on international migration of Indian students as well as foreign students in India, and certifies equivalence of foreign degrees and qualifications in India; (2) National Institute of Educational Planning and Administration (NIEPA), which is the research arm of Ministry of Education to advise on higher education policy, and (3) VVG National Labour Institute, which is the government agency for research and policy advice to the Ministry of Labour and Employment. A few experts who have moved to international organisations were also contacted for a brief exchange of views on the subject, viz., International Centre for Migration Policy Development (ICMPD) and the IOM and those within the GRFDT. These interactions did throw only some tentative and speculative light on the migration of Indian highly skilled professionals or students to the three Gulf countries or to the other GCC member states as this is a new field where no significant Indian scholarship and policy expertise exists.

In preparation for a webinar on international education in Canada organised by India's national daily *The Hindu* on 14 December 2024 with 350 registered participants, I, as a co-panelist with an educational placement agent and the Diplomatic Editor as moderator, asked a sample of 40 students, parents and other civil society stakeholders the following two questions, among others, in the registration form: 1. What are your priority wise destinations for further education and for jobs - Canada, USA, UK, Europe, Australia, Singapore, Gulf countries? 2. Saudi Arabia, Qatar and UAE are changing policies to attract highly skilled and educated Indians. What social, psychological, linguistic, religious, and other non-economic incentives will attract you to prefer universities and/or to high-pay jobs there over Canada and other western countries?[2] Eight student respondents expressed their preference for study in the Gulf countries and the two most important factors attracting them to do so were "academic freedom" and "scholarships".

Conclusion and Recommendations

Given the demand driven policies of major destination countries around the world determining the flows and stocks of highly skilled Indian migrants, it is imperative that the three Gulf countries, viz., the UAE, Saudi Arabia and Qatar also take the lead in devising appropriately similar/comparable policies by addressing the migration drivers at the micro level (migrant individuals and their families), meso level (institutions educating the highly skilled Indians and employing them) and the macro levels (the federal and the state governments on both sides of the borders). The gaps in supply of the highly educated in India and their gainful utilisation through productive employment within India and abroad would have to be tapped appropriately and the competing demand from existing other destination countries must be synchronised through equitable policies across borders (Khadria 2017). The drivers at micro level for attracting Indian individual migrants and their families are universal and well-known requiring no restatement here. Meso-level institutions of education on both sides of borders and the companies providing education and/or employment to Indian migrants in the destination countries are important stakeholders to be enthused to implement the Vision plans announced by the three Gulf countries in their respective economies and societies. However, these will activate only the necessary conditions. The sufficient conditions would be the steps taken by the destination country governments at the macro level. A suggested blueprint is provided in the Policy Report.

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Endnotes

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2 https://www.thehindu.com/videos/webinars/.

7

Assets on the Move: Highly Skilled Migration from the Philippines to the Gulf

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Abstract

The Philippines has long been a major labour-sending country, deploying millions of Filipino workers worldwide, with the Gulf region as a key destination. Although low-skilled overseas Filipino workers (OFWs) dominate this migration, there is a growing presence of highly skilled Filipino professionals. While highly skilled workers are highly sought after in the Gulf, existing research largely focuses on low-skilled OFWs, emphasising their vulnerability to abuse and exploitation. Recently, countries in the region have made changes in their labour and migration policies intended to attract more skilled professionals.

What are the sentiments of highly skilled Filipinos towards moving to the Gulf? What factors matter in their choice of destination? This research investigates the mobility of highly skilled Filipino workers to the Gulf, focusing on the motivations of the migrants and the policy contexts operating from the Philippines as a sending country. The research finds that while a predominant number of highly skilled Filipinos move to the Gulf, there are also those who continue to aspire to eventually relocate to North America and the West where, presumably, wages are relatively higher, and where permanent settlement opportunities are more desirable. Philippine labour migration policy often overlooks the distinction between high- and low-skilled migrants, emphasising protection and regulation of low-skilled migration instead. Bilateral labour agreements (BLAs) between the Philippines and GCC countries largely focus on protecting low-skilled migrants, particularly domestic workers. There is a need to redirect Philippines-GCC labour relations towards increasing the supply of skilled labour from the Philippines and encouraging their mobility through scholarship and trainee ventures especially in the field of healthcare.

Likewise, for the GCC to retain more skilled Filipino professionals, policies that offer competitive pay, career growth, and residency stability with family reunification are essential.

Introduction

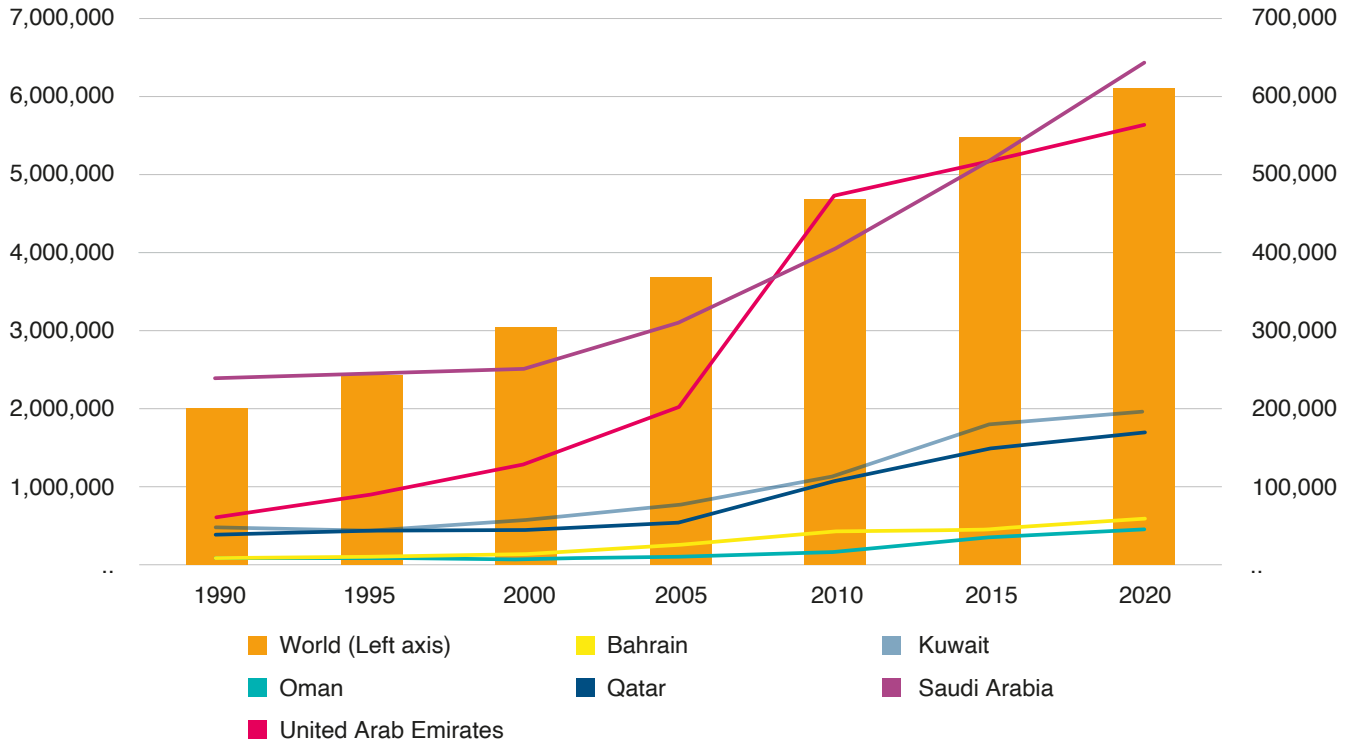
Migrant workers with advanced professional skill sets are looked upon by many receiving countries as desirable assets. They serve as key drivers of innovation and productivity as well as play a vital role in economic growth as a whole (Bansak et al. 2020; Lloyd-Ellis and Roberts 2002). Many countries have adopted policies to attract, retain, select, and mobilise highly skilled workers (Parsons et al. 2020). In contrast, low-skilled migrant workers are often seen as "perfectly substitutable" and in need of close supervision (Naufal 2015, 1603). They are, on the one hand, generally required at the destination to secure a sponsor-employer and are granted work permits of limited duration. Highly skilled migrants, on the other hand, are regarded as essential and irreplaceable, and are often granted more flexible and accommodating arrangements, allowing them to self-sponsor, bring their families with them, and secure extended or continuous residence.

The Philippines is a major producer of high-skilled workers both for its domestic requirements as well as the global labour market. This is made possible through the country's large higher education sector. Hundreds of thousands of graduates of tertiary education enter the workforce each year. Many eventually go abroad. Education (especially at the tertiary level) is highly valued by many Filipinos who see it as a channel that provides opportunities for gaining a better quality of life (Maligalig, et al. 2010, Baltar 2018).

The countries of the Gulf Cooperation Council (GCC) have consistently been the top destinations for Filipino migrant workers of all skill types. The total stock of Filipino migrants in the Gulf region has seen significant growth, particularly since the 2010s (Figure 1). From just 15,000 in the late 1970s (Abella 1979, 10), Filipino labour migration to the Gulf has grown exponentially since. By 1990, there were no less than 400,000 migrants (hereafter referred to as overseas Filipino workers or OFWs) in the region and by 2020, the total stock of Filipino labour migrants in the GCC had increased fourfold to over 1.6 million or roughly 30% of the world's total stock of all Filipino migrants.

Labour migration to the Gulf as a whole has become a crucial economic lifeline for the Philippine economy. Between 1989 and 2023, annual remittances from land-based workers in the GCC averaged 16.4% of total remittances worldwide with the highest percentages observed in 2013 and 2017 (roughly 34%) as shown in Figure 2 below.[1] In 2023,

Figure 1: Filipino Migrant Stock in GCC Countries (1990, 1995, 2000, 2005, 2010, 2015, 2020)



Source: United Nations Department of Economic and Social Affairs (UNDESA).
Accessed at https://www.un.org/development/desa/pd/content/international-migrant-stock on 12 January 2023.

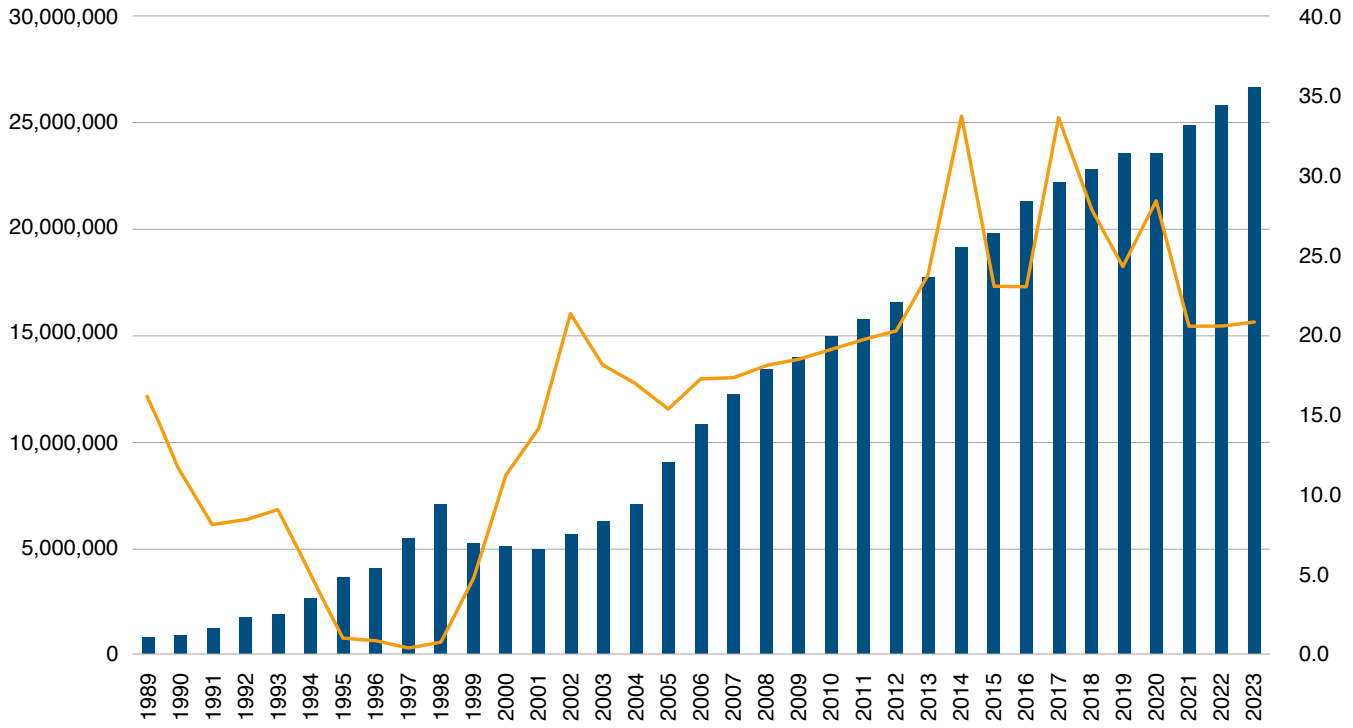
total GCC remittances accounted for 20% of total remittances worldwide. During the first seven months of 2024, remittances from GCC countries totalled USD 19.33 billion, accounting for 16.55% of all remittances from Filipinos worldwide (Arab Times 2024). In 2022, total remittances equalled approximately 9% of Philippine GDP, peaking at 13% in 2005. These financial contributions support millions of Filipino families and play an essential role in national development, highlighting the critical economic importance of this migration flow.

The Gulf is also a major destination for high-skilled Filipinos. The share of high-skilled Filipinos in the Gulf has been observed to be substantial (around half) and growing relative to all highly skilled migrants outside the Philippines. GCC countries rely heavily on foreign labour across a range of skill levels but have shown a growing interest in attracting highly skilled migrants. Many Gulf states are now modifying their labour and immigration policies to attract foreigners with valuable resources, expertise, and experience (Khadri 2018; Ali and Cochrane 2024).

Historically, labour migration to the GCC has primarily involved low-skilled Filipino workers, particularly women employed in domestic service. Numerous studies have looked into the challenges faced by these low-skilled migrants, focusing especially on the discrimination against as well as the precarity among domestic workers from the Philippines and other sending countries (see Nadeau 2007; Parreñas 2015; Silvey & Parreñas 2019; Parreñas et al. 2019). However, the significant and growing presence of highly skilled Filipino workers in the region warrants more in-depth examination and analysis of this particular labour migration phenomenon.

This research investigates the mobility of highly skilled Filipino workers to the GCC countries within the broader policy framework of the Philippines' overseas employment programme, established in the mid-1970s. It addresses the following key questions: How strongly do highly skilled Filipinos feel attracted to opportunities in the Gulf? How might recent changes in labour and migration policies within the GCC countries impact the movement of highly skilled Filipino professionals to the region? And to what extent have bilateral labour agreements advanced the Philippines' goals as a labour-sending country, specifically regarding the outflow of its highly skilled professionals?

Figure 2: Total Land-Based Remittances and Percentage from GCC (Right Axis) 1989–2023



Source: Bangko Sentral ng Pilipinas

In addressing these questions, the paper uses four datasets[2] coming from three government agencies: the Commission on Filipinos Overseas (CFO), the Department of Migrant Workers (DMW), and the Philippine Statistics Authority PSA). These agencies deal with two broad types of migration specifically pertinent to highly skilled persons—temporary migrants (or OFWs) and permanent migrants (or Filipino emigrants). These datasets are not mutually exclusive but do offer a glimpse into the multidimensionality of migration (specifically those of the highly skilled) from the Philippines. It can certainly happen that OFWs can become permanent emigrants (i. e., by acquiring permanent residency or even foreign citizenship) elsewhere by way of stepwise migration and subsequently revert to being temporary migrant workers.

The paper notes the large number of highly skilled OFWs in the Gulf and finds that the country's labour migration policy framework lacks a critical distinction between highly skilled migrants, who often exercise agency due to their valuable and sought-after expertise, and low-skilled migrants, who face greater vulnerability to precarious conditions in host countries. Although these instruments are generally more useful as tools for promoting and facilitating high-skilled migration to the region, bilateral labour agreements (BLAs) with GCC countries have largely focused on reducing the vulnerabilities of low-skilled Filipino migrants, particularly domestic workers.

The study also finds that while many highly skilled Filipinos are likely to work in the GCC, some do aspire to eventually emigrate to the West—particularly North America—where financial rewards tend to be higher and social norms support more permanent family reunification, settlement, and integration. To mitigate this aspiration, Gulf labour migration policies may need recalibration beyond specialised incentives like Golden or Freelance Visas, addressing the broader motivations and long-term aspirations of skilled migrants.

At the same time, any strategic effort to attract and retain highly skilled Filipino workers in the GCC must also consider their positive and negative impacts and implications. Expanding pathways for residency and integration for these migrants is a promising step, benefiting both sending and receiving countries. Receiving countries in the Gulf no longer need to shoulder the education and training costs for their highly skilled migrants. For the Philippines, a larger outflow of highly skilled professionals expectedly means higher remittance incomes. Furthermore, highly skilled migrants generally experience greater employment stability, reducing the social challenges often faced by their

lower-skilled counterparts, who are more vulnerable to precarity and maltreatment.

However, high-skilled migration to the Gulf presents risks and challenges for both sending and receiving countries. For the Philippines, brain drain poses a growing concern, as the growing demand for highly skilled professionals abroad—particularly in the Gulf—competes with domestic needs. In the GCC, offering pathways to permanent residence may attract more highly skilled foreigners, allowing them to establish deeper roots in the region but can also introduce new societal challenges as tensions between permanent residents and citizens arise (Ali and Cochrane 2024).

Highly Skilled Filipino Labour Migration and the Gulf: Aspirations and Reality

For nearly half a century, a "culture of migration" has emerged in the Philippines (Asis 2006) manifesting itself in the desires of millions of Filipinos to live and work abroad. A late 2022 survey found nearly one in five Filipinos had aspired to live abroad, and about one out of ten is actively seeking overseas work opportunities (SWS 2023). The GCC countries also rank high in the aspirations of Filipinos. In that survey, while Canada was the top destination for those aspiring to work abroad, four of the six most-cited countries are in the GCC: Saudi Arabia (12%), Kuwait, the UAE (9% each), and Qatar (6%).[3]

Data from the 2018 National Migration Survey (NMS), however, presents a more nuanced picture of such aspirations.[4] In weighted terms, the number of 15–60-year-olds who answered they have plans to move to another country totaled nearly 3.5 million Filipinos although around half did not yet specify which country they intend to move to. Among those with a specific destination country or region, only 13.8% of the total said they plan to move to the GCC, while a slightly higher 15% said they planned to move to North America, specifically the US or Canada (bottom panel of Table 1). The rest said they plan to move to other regions, including Western Europe and the UK (each 2%), Australia, and New Zealand (4% each).

Aspirations and Education

Another way of looking at Filipinos' overseas aspirations is to examine their shares by education level. This is also important since highly skilled Filipinos are presumed to be well-educated, particularly graduates of tertiary-level education. Among those who said they planned to go to the GCC, only 18% were at least college graduates and 62.5% were at most high school graduates. In contrast, among those who said they planned to go to North America, 42% were at least college graduates and 39% were at most high school graduates (upper panel of Table 1). The GCC countries had only a 9.7% share among college graduates who said it was their planned destination, much lower than North America; while 16% of high school graduates said they wanted to migrate to the Gulf, higher than the share of those who intend to move to North America which is 10.8% (bottom panel of Table 1). In general terms, those with higher education are almost 2.5 times more likely to choose North America over the GCC.

Table 1: Destination Country/Region of Choice by Those with Intention to Migrate in the Next 5 Years, by Education Level

	HS graduate and lower	College undergraduate	College graduate or higher	Total number
Region	**Share in row total (%)**			**100%**
GCC	62.5	19.1	18.4	482,296
North America	39.2	18.4	42.4	521,622
Western Europe and UK	45.5	23.5	31.0	71,185
Australia and New Zealand	29.5	23.2	47.4	126,523
Other country identified	59.2	20.2	20.6	571,586
Other country undecided	57.1	19.1	23.8	1,713,912
All destinations	54.3	19.4	26.3	3,487,123
Region	**Share in column total (%)**			**Total**
GCC	15.9	13.6	9.7	13.8
North America	10.8	14.2	24.1	15.0
Western Europe and UK	1.7	2.5	2.4	2.0
Australia and New Zealand	2.0	4.3	6.5	3.6
Other country identified	17.9	17.0	12.8	16.4
Other country undecided	51.7	48.4	44.5	49.2
All destinations	**100.0**	**100.0**	**100.0**	**100.0**

Source: Authors' computations using the National Migration Survey (NMS) 2018

Aspirations and Occupation

Filipinos' preferred destination by skill level can also be analysed by the prospective migrants' current local occupation. In Table 2, the NMS population is grouped into whether they currently have 'high skill' occupations (i. e., professional or managerial jobs and technician or associate professional jobs) or 'low skill' occupations. It is true, of course, that not all college graduates have professional or managerial jobs and that not all professionals and managers are necessarily college graduates.

In general, the patterns are the same as in the analysis by education level. Around 17% of those high-skill 15–60-year-olds (and slightly less than 12% among those who are 15–30 years old) signified an intention to move to the Gulf while a much higher proportion (42%) of the high-skilled chose North America (see Table 2) which is the case both generally and for the younger population. Once again, employed highly skilled workers from the Philippines are around 2.5 times more likely to choose North America over the GCC and over three times more likely if they were younger. Meanwhile, those in low-skill occupations are around 1.5 times more likely to choose the GCC as their preferred destination. Indeed, the largest proportion among the low-skill workers (and the lowest proportion among the high-skill workers) specifically chose the GCC as their preferred destination.

In sum, it appears that the GCC is a less preferred destination among the higher-skilled (whether measured in terms of education or current occupation) who have plans to migrate. This is especially true for younger high-skilled workers who can be expected to have more opportunities for actual migration in the future. The desire to migrate elsewhere, particularly to North America and other Western countries is not surprising given the strong historical, economic, political, and cultural ties the Philippines has had with the West, in general, and the US, in particular. However, the aspiration to migrate among Filipinos renders

Table 2: Destination Country/Region of Choice by Those with Intention to Migrate in the Next 5 Years

	15–60 years old			15–30 years old only		
Region	Low Skill %	High Skill	Total Number (100%)	Low Skill %	High Skill	Total Number (100%)
GCC	82.8	17.2	212,681	87.9	12.1	108,904
North America	58.0	42.0	271,363	57.7	42.3	129,281
Western Europe and UK	79.2	20.8	31,568	56.6	43.4	9,366
Australia and New Zealand	47.7	52.4	69,492	30.3	69.7	35,384
Other country identified	78.1	21.9	200,312	85.8	14.2	106,143
Other country undecided	77.8	22.2	830,668	73.5	26.5	429,114
All destinations	73.9	26.1	1,616,084	72.4	27.6	818,192

Source: Authors' computations using the 2018 NMS.

only one side of the story. The reality is more complicated and nuanced as will be discussed below.

Destinations of Skilled Filipino Emigrants

The US has historically been the top destination among Filipino emigrants or permanent migrants from the Philippines. Between 1981 and 2022, around 80% of all registered Filipino emigrants went to the US and Canada, according to data from the Commission on Filipinos Overseas (CFO).[5] Among Filipino emigrants, around 45% are college graduates at most. About 12% of the total number of emigrants were employed in high-skill occupations in the Philippines. Interestingly, the largest number of emigrants are students (25%) followed by those classified as housewives (19%).[6] During this period, a total of 2.5 million Filipino emigrants were registered. Of this number, only 1,024 were registered to have gone to the GCC.

Destinations of Highly Skilled OFWs

In January 2023, DMW recorded over 224,000 deployed OFWs worldwide. Of this total, 45% went to the GCC. Among those deployed globally on new labour contracts, around 17% are classified as highly skilled. Data from DMW deployment statistics is validated by the results of the 2022 Survey of Overseas Filipinos (SOF) which shows that the GCC countries were the destination for a slight majority (51 percent) of total OFWs. This represents a slight decrease from its 53 percent share in 2017 but is still much higher than its 40 percent share in 2007 (bottom panel of Table 3). Looking at only high-skilled OFWs in the 2022 SOF, the share of GCC countries is about the same at only 51 percent in 2022 but has seen a significant drop from 65 percent in 2017 although higher than the 42 percent in 2007 (bottom panel of Table 3). Likewise, most of these migrants occupy low-skill positions, like in other regions (middle panel of Table 3). However, the relative shares of highly skilled migrants are decreasing more regularly in the GCC and increasing elsewhere, especially in Australia and Europe. Nevertheless, the Gulf continues to capture the bulk of Filipino migrants (both low- and high-skilled) in absolute terms (upper panel of Table 3).

Table 3: Overseas Filipino Workers by Destination Region and Skill Level

	2022			2017			2007		
	Number			Number			Number		
Region	Lower Skill	High Skill	Total	Lower Skill	High Skill	Total	Lower Skill	High Skill	Total
GCC	972,687	151,015	1,123,701	1,090,291	227,895	1,318,185	613,704	150,315	764,019
North and South America	110,657	25,055	135,712	122,171	21,198	143,369	144,122	49,990	194,112
Europe	145,464	21,562	167,026	144,319	9,756	154,075	145,009	30,881	175,890
Australia	41,465	14,012	55,476	35,481	5,919	41,400	22,670	8,674	31,344
Other country identified	628,623	82,822	711,444	757,899	88,344	846,243	648,041	120,365	768,406
All destinations	1,898,894	294,466	2,193,360	2,150,161	353,111	2,503,272	1,573,546	360,224	1,933,771
Region	**Share in row total (%)**			**Share in row total (%)**			**Share in row total (%)**		
GCC	86.6	13.4	100.0	82.7	17.3	100.0	80.3	19.7	100.0
North and South America	81.5	18.5	100.0	85.2	14.8	100.0	74.3	25.8	100.0
Europe	87.1	12.9	100.0	93.7	6.3	100.0	82.4	17.6	100.0
Australia	74.7	25.3	100.0	85.7	14.3	100.0	72.3	27.7	100.0
Other country identified	88.4	11.6	100.0	89.6	10.4	100.0	84.3	15.7	100.0
All destinations	86.6	13.4	100.0	85.9	14.1	100.0	81.4	18.6	100.0
Region	**Share in column total (%)**			**Share in column total (%)**			**Share in column total (%)**		
GCC	51.2	51.3	51.2	50.7	64.5	52.7	39.0	41.7	39.5
North and South America	5.8	8.5	6.2	5.7	6.0	5.7	9.2	13.9	10.0
Europe	7.7	7.3	7.6	6.7	2.8	6.2	9.2	8.6	9.1
Australia	2.2	4.8	2.5	1.7	1.7	1.7	1.4	2.4	1.6
Other country identified	33.1	28.1	32.4	35.2	25.0	33.8	41.2	33.4	39.7
All destinations	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

**High skill refers to managers and professions, mid-skill to associate professionals and technicians, and lower skill to skill to other occupations*
Source: Authors' computations using the various rounds of the Survey of Overseas Filipinos (SOF)

Among those who were at least college graduates in the Philippines, only 10% said they planned to move to the GCC countries, while 24% said they planned to move to North America (PSA 2019). At the other extreme, 16% of those whose highest level of education is high school[7] planned to go to the Gulf while only 11% said they planned to go to North America.

Table 4: Monthly Income of OFWs by Skill Level and Destination Region (in Philippine Pesos)

	Mean			Median		
Region	**Low Skill**	**High Skill**	**Total**	**Low Skill**	**High Skill**	**Total**
GCC	25,085	54,368	29,020	21,000	40,000	22,000
North America	60,305	100,674	67,758	50,000	60,000	50,400
Europe	59,264	98,021	64,267	50,000	80,000	50,000
Australia	54,623	62,900	56,713	40,000	60,000	40,002
Other country identified	35,755	57,622	38,300	29,000	35,000	30,000
Total	**33,933**	**62,826**	**37,812**	**25,000**	**45,000**	**26,000**

Source: Authors' computations using the 2022 Survey of Overseas Filipinos
Note: In 2022, the average peso-dollar exchange rate was Php54.5: $1.

High Skill OFW Wages by Destination

It may be implied from the data above that the likely explanations for why many highly skilled Filipinos still prefer to move to North America and the West may have to do with the higher wage rates expected in those regions compared to the Gulf as well as the greater possibility of improvement in one's quality of life.[8] Job satisfaction and higher remuneration are certainly factors affecting the skilled professionals' decision to move (Toyin-Thomas, et al. 2023).

Table 4 shows the average income reported by OFWs in the 2022 SOF was lower in GCC countries compared to other destination regions.[9] This is generally true across all occupation levels. For high-skill workers, meaning those working as managers or professionals, the mean income reported by OFWs in GCC countries was only 65% of the mean income of similar workers in North America and only 62% of the mean income in Europe. Higher expected incomes for high-skill workers from the Philippines are another motivation for choosing the destination regions.

Likewise, a study of the drivers of migration among healthcare professionals reflected in research articles published between 1970 and 2022 found that remuneration and security were the most common macro-level factors. At the professional meso-level, the drivers were career prospects, a good working environment, and job satisfaction while at the personal micro-level, the factors were family ties and improved quality of life at the destination (Toyin-Thomas, et al. 2023).

Other likely factors can include the presence of a network of private recruitment agencies that actively recruit as well as facilitate the entry of Filipino migrants into the region.[10] The growth of the private recruitment industry has no doubt been encouraged by the demand for jobs in the region. The private recruitment sector has long been the cornerstone of the Philippine overseas employment programme (Martin, et al. 2004) along with established government mechanisms for protecting Filipino migrants in the region (Ruiz 2020). Since migration to the Gulf has been taking place over several decades, it is not surprising to find a stable and thriving migrant community that can also prompt many Filipinos to choose to work there more than elsewhere (see Hosoda 2019). Finally, the higher wages offered by Gulf employers relative to Philippine wage rates are also a critical factor in the choice of destination.

The Philippine Policy Framework on Highly Skilled Labour Migration

The Philippines policy framework on highly skilled labour migration is guided generally by the Labour Code (in place since 1974) and the Migrant Workers Act of 1995. The Code emphasises the state's role in regulating the outflow of Filipino labour. As far as securing jobs overseas is concerned, the programme makes no distinction between highly skilled and lower-skilled workers even though there is an implied emphasis on the former compared to the latter. It is the declared policy of the state "[t]o promote and maintain a state of full employment through improved manpower training, allocation, and utilisation" (Book 1, Article

12) and "promote the development of the skills and careful selection of employment of Filipino workers for overseas employment" (Book 1, Article 16). The Code further mandates the establishment of a "national skills standard for industry trades" (Book 2, Article 48). All in all, the Code's general orientation rests primarily on promoting full employment by facilitating labour outmigration and, secondarily, the protection of the migrants "by securing for him the best possible terms and conditions of employment" (Book 1, Article 12).

In 1995, the labour migration programme began to shift its emphasis towards a rights-based migrant protection approach. The Migrant Workers and Overseas Filipinos Act of 1995 (Republic Act 8042) sets out the responsibilities of various government agencies in regulating recruitment, deployment, and, most importantly, the protection of the rights and welfare of Filipino migrants. The Migrant Workers Act was adopted in response to growing concerns about the safety and welfare of Filipino migrant workers specifically those in low-skilled occupations. It was triggered by several high-profile cases of abuse, exploitation, and even the deaths of OFWs, most notably the execution of Filipina domestic worker Flor Contemplacion in Singapore. Key institutions such as the Philippine Overseas Employment Administration (POEA) and the Overseas Workers Welfare Administration (OWWA) would now play central roles in facilitating and monitoring the deployment process of OFWs ensuring that their rights and welfare are reserved.

Bilateral Agreements

Bilateral agreements have been used to manage relations between countries. Such agreements can take the form of labour agreements and social security arrangements that can also impact on the movement of highly skilled labour.[11] Bilateral labour agreements (BLAs) can specify conditions for the recruitment and hiring of highly skilled workers. At the same time, these agreements can also strengthen migrant protection efforts by formalising commitments to safeguard the rights and welfare of OFWs, addressing issues like contract enforcement, working conditions, and dispute resolution.

The Philippines currently has social security agreements with several Western countries but none with any GCC country.[12] Obtaining social security agreements with receiving countries can ensure equal treatment, portability of benefits, and mutual administrative assistance for covered workers providing much-needed assurance for highly skilled workers. This predicament can also impact on highly skilled Filipinos' decision to move to the Gulf.

As far as the pursuit of bilateral labour agreements is concerned, the Philippines faces several challenges. Securing such agreements depends largely on the willingness of receiving countries. This is why BLAs are difficult to secure and why many countries resort to entering into informal agreements instead such as memoranda of understanding. These MoUs provide for general principles of cooperation between countries but rarely touch on specifics. They are less problematic and less challenging to enforce since their effectiveness largely depends on the willingness of both contracting parties to actually implement their provisions. As Stella Go (2007) points out, the effectiveness of such MoUs depends less on their non-binding character and more on "how well they are implemented and enforced by the contracting countries" (p. 2).

There is no perfect working BLA. A study by Nathan Blank (2011) comparing Philippine BLAs with Canada, Japan, Korea, Bahrain, and the UAE notes that while there is an emphasis on attracting highly skilled labour, these tend to be limited to very specific sectors such as nurses (such as with Japan and Bahrain) or may apply to many job categories but lack procedures for sustaining the cooperation (as with Canada) or merely reiterate basic rights such as the right to be informed of basic working conditions and wages or entitling migrants to social insurance (as with the UAE and Korea).

Due to the number of reported cases of abuse and maltreatment of OFWs especially domestic workers in the Gulf, the Philippine government's desire to enter into formal labour agreements with countries in the region is both understandable and warranted. A review of Philippine BLAs by Bernard Paul Mangulabnan and Carl Rookie Daquio (2019) found that, as of October 2018, the country had a total of 43 BLAs worldwide, 65 percent of which were non-legally binding in nature. Of the total number of BLAs, 19 were with countries in the Middle East and 11 were with countries in the Asia-Pacific. There were only seven BLAs with North America (only one of which is legally binding) and six with European countries (two are non-legally binding). Of the 19 BLAs signed with countries in the Middle East, 11 were informal, non-legally binding arrangements. Most of the labour agreements between the Philippines and the GCC countries are concerned more with protecting and promoting the rights and welfare of Filipino migrant domestic workers including provisions on their recruitment and repatriation (Mangulabnan and Daquio 2019). Qatar, Kuwait, and Bahrain have signed with the Philippines their

respective protocols and agreements on the recruitment of skilled Filipino workers although this relates specifically to facilitating the hiring of nurses and healthcare professionals. Oman does not currently have a BLA with the Philippines.

Tertiary Education, Local Employment, and Skills Training in the Philippines

The higher education sector in the Philippines is dominated by private tuition-fee-charging higher education institutions (HEIs) or colleges and universities. As of January 2024, there are 1,977 HEIs throughout the country—1,714 private institutions and 263 public sector institutions (PCO 2024). All are accredited by the Commission on Higher Education (CHED), the regulatory body overseeing higher education in the country except for the University of the Philippines.[13]

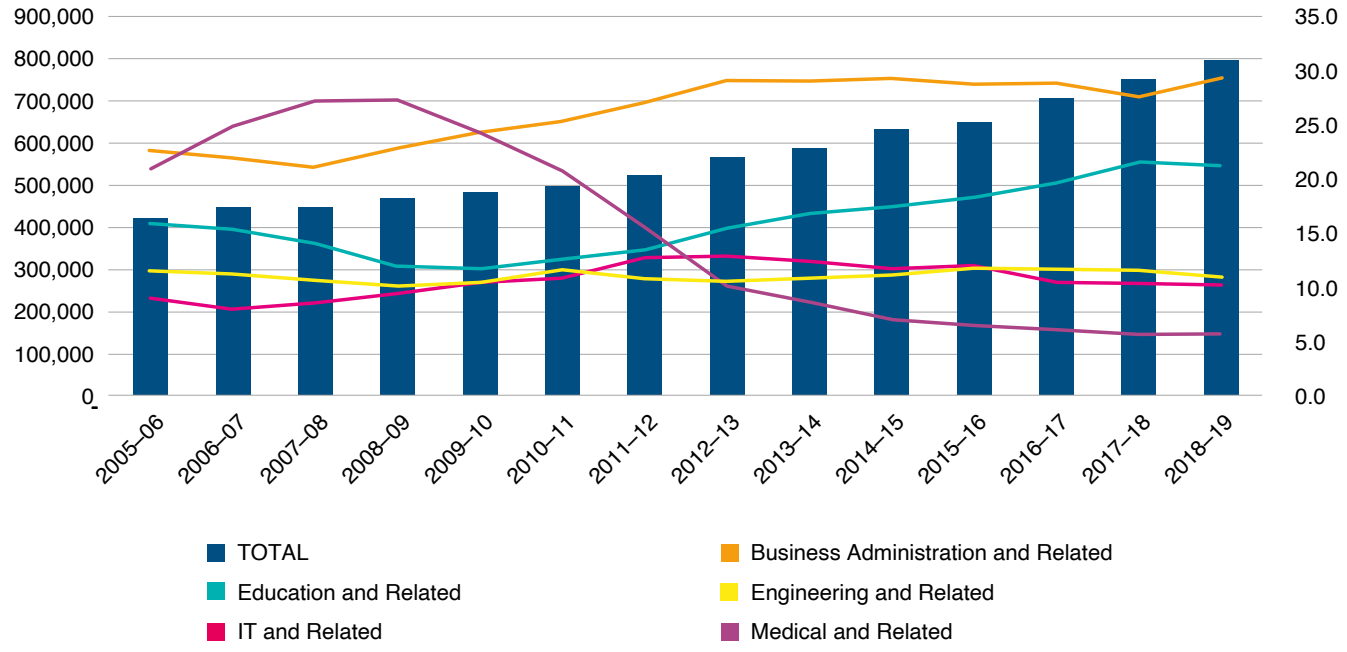
During the academic year (AY) 2022–2023, there were 4.79 million students enrolled in HEIs throughout the country – 1.85 million in state universities and colleges (SUCs) and 2.46 million in private institutions. The top five disciplines of enrolment are education, business, engineering, information technology, and medicine. These five disciplines together make up almost 80% of the total graduates (see Figure 3 below).[14]

As far as local employment is concerned, the proportion of employed highly skilled workers is rather small when compared to other occupational groups although it appears to be increasing. In 2000, employed highly skilled workers made up around eight percent of the total employed persons. By 2010, this proportion had doubled to slightly over 20% but has dipped to 15% in the wake of the pandemic as shown in Figure 4 above.

Figure 5 shows the unemployment rate by education level based on the most recent disaggregated data available. In December 2023, the Philippine unemployment rate went down to 3.2%, its lowest in two decades (NEDA 2024).

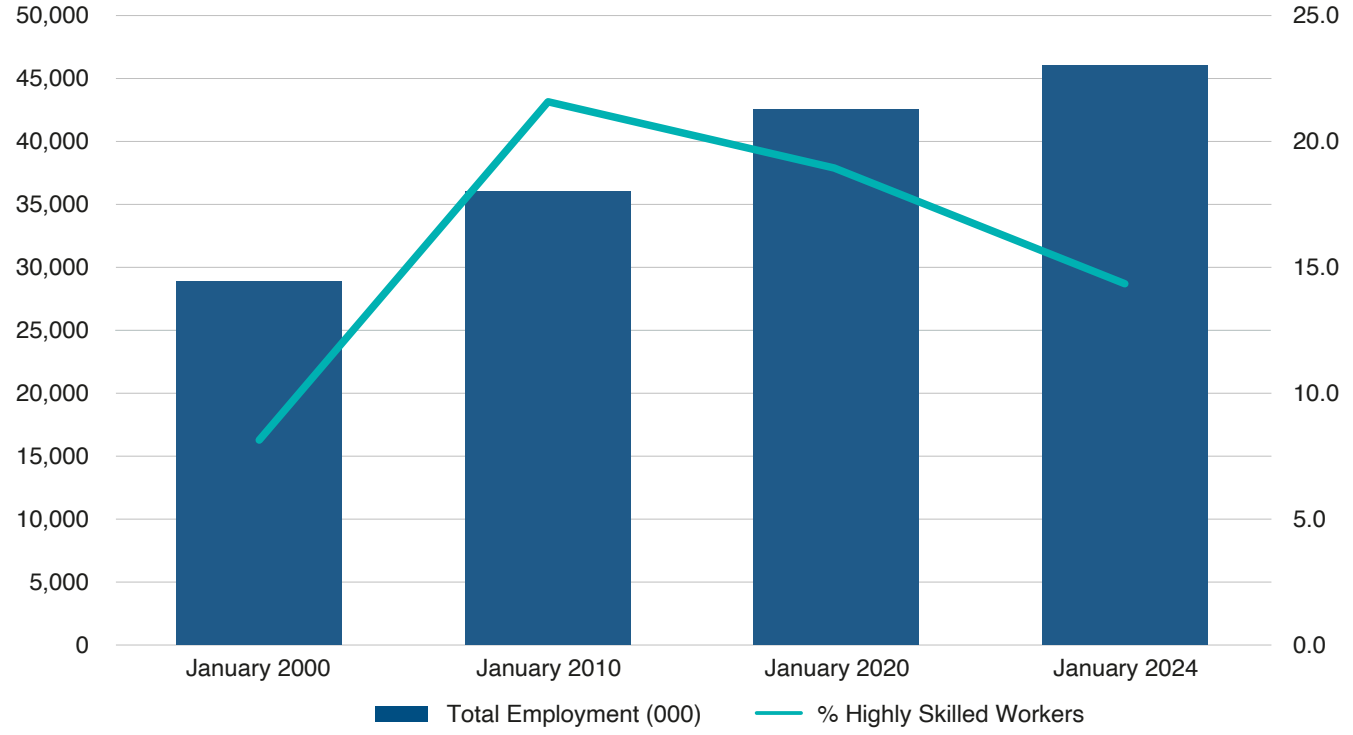
Finally, under current Philippine regulations, workers of various skill levels are required to secure the appropriate certifications from various agencies. The Technical Education and Skills Development Authority (TESDA) is responsible for regulating and accrediting skills-testing centres that issue technical skills competency certifications to workers whether for local or overseas employment. Highly skilled professionals are required to submit proof of completion of requisite courses from the Commission on Higher Education (CHED). Where a license is required to practice a certain profession, the Professional Regulatory Commission would be the agency to issue such a license to practice.

Figure 3: Higher Education Graduates by Top Disciplines (AY2005–06 to AY 2015–16)



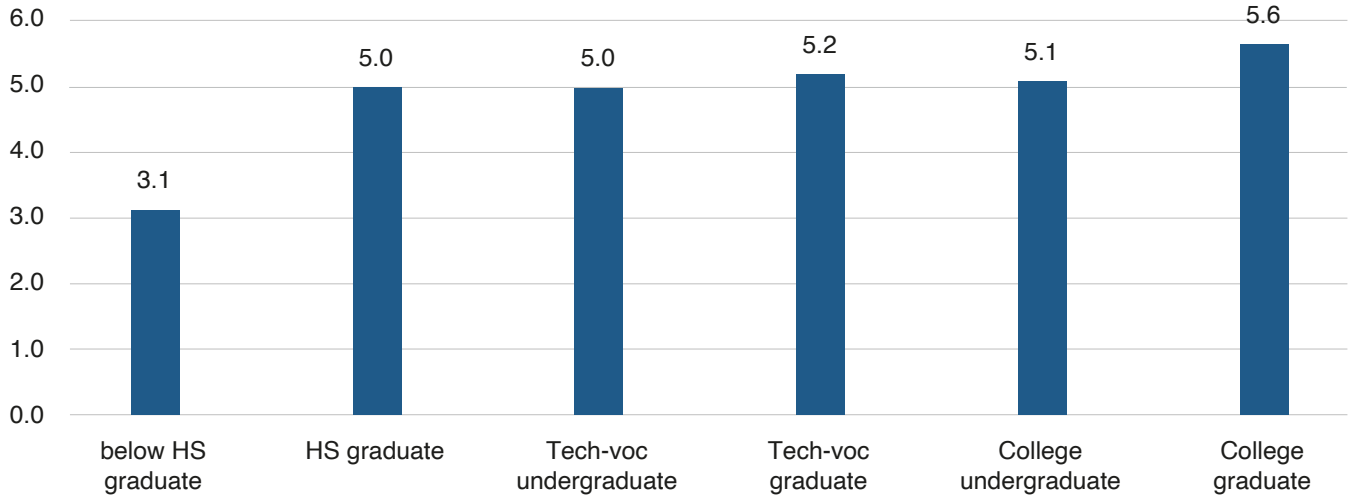
Source: Commission on Higher Education (CHED) Knowledge Management Division

Figure 4: Total Employed Persons (Left Axis) and Percent Highly Skilled Workers (2000, 2010, 2020, 2024)



Source: Philippine Statistics Authority, Labour Force Surveys

Figure 5: Unemployment Rate by Education Level (April 2023)



Source: Philippine Statistics Authority, Labour Force Survey

Stepwise Migration and Highly Skilled Filipino Migrants

In general, temporary foreign residents who face the reality of temporary residency will seek out and create alternative pathways by resorting to circular, serial, and even stepwise migration.[15] Marko Valenta (2022) notes that it is not uncommon for foreign migrants in the Gulf to engage in one such kind of migration or another given the reality in the region where foreign workers of whatever skill level are essentially and generally defined as temporary residents. Under such circumstances, "onward migrations may be experienced as an opportunity… that bring[s] clear improvements in migrants' life circumstances" (Valenta 2022: 679).

Based on this, Valenta (2022) was able to distinguish several categories of migrants in the Gulf—those who had clear intentions to migrate beyond the Gulf towards the West; those who did not seem to have such plans and whose primary goal was to obtain long-term employment in the region; and those who engaged in repeated circular and serial migrations across the countries in the region (p. 681). In general, stepwise migration from the Gulf to their desired and final destinations in the West is more likely to be undertaken by high-skilled than low-skilled migrants (see Valenta 2022 and Paul 2011).

The desire to remigrate is common for all migrants of every skill level but is also dependent on various factors and conditions in both the origin and destination. However, highly skilled professionals would be in a better position to seek out these improvements beyond the Gulf due to their higher human capital. There have been several studies on stepwise migration among skilled professionals from the Philippines, mainly nurses. In her study of stepwise Filipino migrant nurses in Singapore, the UAE, Australia, and Japan, Maria Reinaruth Carlos (2014) observed that some professionals have had previous work experience outside the Philippines. Of their previous overseas work experience, Saudi Arabia was the most popular given the active recruitment of nurses there since the 1970s (Carlos 2014: 168).[16]

Facilitated processing at an affordable cost contributed to the popularity of Saudi Arabia as an initial destination for Filipino nurses. This is also observed by Alvaro Alonso-Garbayo and Jill Maben (2009) who note that migration to the Gulf is usually seen as the initial step to moving to other destinations, most notably in the West, the US, or Australia.

The UK and Ireland were particularly crucial as desirable destinations for the migrants since gaining a passport from those places gave the nurses a greater advantage once they move to the Gulf in terms of negotiating with their employers for their job position and salary compared to migrating directly from the Philippines (see Carlos 2014).

Her study found that stepwise migration makes sense as it allowed the nurses to accumulate resources in transit that would not have been available in the Philippines. Not surprisingly, many nurses aim for the US as their top destination due to its historical and cultural affinity with the Philippines. In sum, foreign migrants in the Gulf can and do engage in serial and circular migrations but also have the ability to perform stepwise migrations particularly to top-tier countries in the West especially in the case of highly skilled workers (Valenta 2022).

Conclusions and Recommendations

It can be observed that the Philippine policy framework on labour migration, under which highly skilled workers fall, largely emphasises the state's role in monitoring overall labour outflows but with the added primary goal of protecting the welfare of low-skilled migrants. This is certainly commendable but can have serious implications with respect to high-skilled professionals from the Philippines as it glosses over the differences in status between highly skilled and low-skilled migrants. High-skilled workers are an asset wherever they are while low-skilled migrants are seen as largely replaceable.

Bilateral agreements, including labour agreements (BLAs) and social security arrangements, play a crucial role in managing migration and ensuring migrant protection, particularly for highly skilled workers. While BLAs can formalise recruitment conditions, enforce contracts, and safeguard rights, they are often difficult to secure due to the reliance on receiving countries' willingness to agree to their terms. The Philippines has faced challenges in obtaining formal labour agreements with GCC countries, where most arrangements are non-binding and focus on domestic workers' rights, recruitment, and repatriation. Despite these challenges, agreements in the GCC region have included specific protocols for hiring healthcare professionals.

There is a need for the Philippines as a sending country to recast its policy framework and disentangle highly skilled workers from less-skilled migrants and to follow the

lead in many destination countries in the Gulf of providing incentives and arrangements for the entry and stay of skilled professionals. Highly skilled workers are less likely to encounter issues that less-skilled workers are confronted with such as their vulnerability to abuse compounded by their precarity. Professional workers are in a better position to negotiate on their own behalf because they can exercise greater freedom of mobility due to their valued experience and talents.

Receiving countries in the Gulf may need to strategically recalibrate their policy to attract foreign skilled talents moving away from one that targets a specific (albeit momentary) need (such as healthcare providers) towards one that has a broader appeal towards and appreciation for foreign professional and skilled talents in general. Such facilitated mobility programmes would also need to incorporate some degree of long-term, if not, permanent resettlement schemes. More importantly, GCC countries may wish to consider embarking on agreements with the Philippines to provide scholarships to deserving Filipinos under selected degree programmes and once they graduate, to facilitate or prioritise their entry and employment into the region as trainees or as outright skilled workers.

The current schemes obtained in certain Gulf countries, such as the granting of Golden and Freelance Visas to select migrants, among other benefits and privileges, may be desirable for many high-skilled professionals whose perspective is to engage in circular or serial migration within the region (Ali and Cochrane 2024). However, this may not be enough of an incentive for Filipinos intent on engaging in stepwise migration eventually reaching their final desired destination which is the US or some other country in the West.

Finally, while highly skilled OFWs play a crucial role in these Gulf states given their specialised expertise, it is also important to acknowledge the implications that such labour flows will have on the Philippines. In a tight labour market, which appears to be the case now with the Philippine unemployment rate at its lowest level historically,[17] skilled worker outmigration could negatively affect the productive capacity of the local economy by reducing the amount of skilled labour within the country to an extent that could not be immediately and adequately filled-in by those left behind.

The Philippines needs to review its domestic employment programmes for skilled talents with the end in view of retaining and mobilising more of them. The brain drain problem (especially in the health sector) will become increasingly evident as the country's employment situation improves further over the next decade or so. Such a development can have serious implications on the country's future as a source of highly talented labour. The remittances sent back by talented migrants may not suffice to cover the cost of educating, training, and retaining new highly skilled workers. Around 2.4 million skilled local jobs may remain unfilled unless the country is able to train and produce enough skilled workers (Aurelio 2020). The government would have to find ways for such remittance income to be ploughed back into the educational system to train and produce highly skilled workers to compensate for the ones lost to emigration.

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Endnotes

1 The figures represent total remittances from landbased workers only.

2 The first dataset comes from the Commission on Filipinos Overseas (CFO), an agency tasked with monitoring Filipino emigrants, defined as individuals who leave the country to settle permanently abroad who may even acquire dual citizenship. Such emigrants typically include the dependents of highly skilled individuals. The second dataset comes from the Department of Migrant Workers (DMW), formerly the Philippine Overseas Employment Administration (POEA) which is tasked with monitoring and regulating the outflow of Filipino contractual or temporary labour. Migrant workers typically are not allowed to bring their families with them and are abroad only for a limited duration. In some cases, highly skilled Filipino migrants are allowed to bring their families with them depending on the policies and rules issued in the receiving country.

The data from DMW/POEA typically takes the form of deployment statistics of overseas Filipino workers (OFWs) who are either landbased or seabased, and new hires and rehires. Landbased OFWs are hired either by direct hiring of an employer abroad or through the assistance of the DMW or through a private and licensed recruitment agency. Seabased workers are seafarers or workers who are engaged or work onboard a ship. New hires refer to OFWs who will serve his/her employment contract on a new jobsite and under a new contract. Rehires refers to the landbased workers who renewed their employment contracts with the same principal.

The third dataset used in this paper is the Survey of Overseas Filipinos (SOF). The SOF is conducted by the Philippine Statistics Authority (PSA) as a rider to the Labour Force Survey (LFS) of around 179,000 households. The SOF respondents are households in the Philippines who have reported a member who has left to work abroad (i. e., as OFW) in the past five years from the date of the survey. The data unit is the individual overseas worker, although the information is obtained not directly from them but from the households they left behind. The survey collects socio-economic information on the overseas worker, the amount of remittances in cash or in kind they send, their mode of sending, and in recent surveys also their average income. In the 2022 SOF, data was collected for 3,835 overseas workers.

The last dataset used in the paper is the National Migration Survey (NMS) conducted by the PSA and the University of the Philippines Population Institute (UPPI) in 2018 and is the first dedicated nationwide survey on migration in the Philippines. The NMS gathered information on households and their members as well as those with either internal or international migration experience (not necessarily for labour).

3 The United States was also among the top choices, cited by 6% of respondents.

4 The NMS Survey involves 49,000 households. Respondents were asked the following questions:

• Do you have plans to move/reside in another city/municipality and province, or country in the next 5 years?

• Where do you plan to move/reside in the next 5 years?

5 Filipino emigrants are those leaving the country to settle permanently abroad and are required to register with the CFO. These emigrants have managed to secure permanent residency abroad and are likely on the way to securing foreign citizenship. Emigrants can include Filipinos from a wide range of age and education backgrounds including infants and school-age children as well as the elderly. The data on Filipino emigrants is separate from data on OFW deployment compiled by the Department of Migrant Workers (DMW) and who are mostly temporary migrant workers. OFWs are not typically granted permanent residency and are even less likely to be granted foreign citizenship.

6 It is likely that the housewives in the CFO records are spouses of other Filipino emigrants or foreigners.

7 Prior to 2012, basic (pre-university) education in the Philippines followed a 10-year system comprising six years of elementary education and four years of high school and which was considered one of the shortest education cycles in East Asia (de Guzman 2003).

8 These explanations do not negate the fact that (a) local wage rates for highly skilled Filipinos are definitely much lower than the rates obtaining in the Gulf and elsewhere which is why many still choose to go there and (b) young Filipino migrants are sometimes forced to downgrade their occupation at the destination leading to brain waste (see Battistella and Liao 2013).

9 The survey question asked of the household respondent is "What is (migrant worker's) average monthly income?" Although not explicitly stated, this is likely taken to mean by the respondent as net of taxes. As well, it is not clear whether the question takes into account other benefits (e. g. free housing or housing allowance, insurance, etc.) received by the OFW.

10 There are currently around 3,700 recruitment agencies in the records of the Department of Migrant Workers, many of these are licensed to recruit workers to the GCC countries.

11 Pertinent to migration, Go (2007) identifies several forms—bilateral labour agreements, bilateral economic agreements, bilateral maritime agreements, bilateral social security agreements, and anti-trafficking agreements.

12 The Social Security System (SSS) website currently lists the countries with which the Philippines has bilateral social security arrangements. These are Austria, Belgium, Canada, Denmark, France, Germany, Japan, Korea, Luxembourg, Netherlands, Portugal, Quebec (Canada), Spain, Sweden, Switzerland, and the UK and Northern Ireland (https://www.sss.gov.ph/bilateral-agreements/).

13 A higher education institution (HEI) is an institution of higher learning primarily offering bachelor and advanced degree programs and excludes institutions that offer only vocational courses or associate degree courses. Higher education is distinguished from tertiary education which encompasses all post-secondary education including technical and vocational training.

14 There is no breakdown by program level (bachelor's, Master's, and Doctoral) and by discipline in the publicly provided enrolment reports of CHED. For AY2022-23, only 3.0% were Masteral students and 0.8% were doctoral students.

15 Circular migration is the repeated movement of individuals between two countries, home and destination, for temporary employment, while maintaining ties to their place of origin. Serial migration is where the migrant moves to multiple destinations sequentially (typically within a certain region like the Gulf) over time, often driven by mandated policies on temporality, evolving opportunities in different destinations, changing circumstances, or the pursuit of better living conditions. Stepwise migration refers to a gradual process where migrants move in stages, often starting with moves within the region and eventually reaching their final destination within a preconceived hierarchy of destinations. At each step, they may acquire skills, resources, or adaptation experience that facilitates further onward migration. For a more detailed discussion of circular, serial, and stepwise migration, see Valenta 2022.

16 Between 2004 and 2010, 70% of all newly hired nurses went to Saudi Arabia (Carlos 2014: 168). In 2010, of the 12,082 Filipino nurses who went abroad, 8,512 went specifically to Saudi Arabia, according to deployment figures from the Philippine Overseas Employment Administration (POEA), now DMW. However, by 2019, this percentage had gone down to just 56% (16,711 Filipino nursing professionals abroad of which 9,488 went to Saudi Arabia alone).

17 The unemployment rate in 2023 averaged 4.4% and has steadily gone down from 10.3% in 2020 at the height of the COVID-19 pandemic. This is historically the lowest unemployment rate in the country since at least 2005 when the country modified its definition of unemployment.

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