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Abstracts

The Future of Labour and Migration in Saudi Arabia and the Gulf

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Gulf Research Center – Office FN11A, North Tower, King Faisal Foundation - Riyadh, Kingdom of Saudi Arab

Abstracts – Research Reports

1. Dina Abdelfattah

Highly Skilled Migration from Egypt to the Gulf States

Research Report - Abstract

This report explores the dynamics of highly skilled migration from Egypt to the GCC countries, emphasizing drivers, policy frameworks, and socio-economic impacts. The study highlights the evolving labor demands in the GCC, driven by diversification initiatives such as Saudi Arabia's Vision 2030 and the UAE's Vision 2031, 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. Challenges include Egypt's brain drain and barriers for migrants in the GCC, such as inadequate social protections and limited residency options.

The report advocates for comprehensive bilateral agreements addressing primarily social protection, portability of benefits, and gender sensitivity. For Egypt, it recommends enhanced pre-migration training and reintegration support to leverage remittances and mitigate brain drain. For the GCC, reforms in labor laws, expanded residency pathways, and inclusive migration policies are critical to retaining skilled talent and achieving diversification goals.

Ultimately, the study highlights the potential for a "triple win" scenario—benefiting Egypt, the GCC, and migrants—through strategic, evidence-based policy frameworks that balance economic development with the rights and aspirations of highly skilled workers.



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2. Justin Alexander

The Global Competition for Talent - How Does Saudi Arabia Compare to Gulf and Global Peers?

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Research Report - Abstract

A critical but unstudied aspect of Saudi Arabia's Vision 2030 agenda is that one of its objectives is to attract appropriate migrants, particularly highly skilled ones, to help grow and diversify the Saudi economy. Some other Gulf states have a similar perspective and are competing for talent with Saudi Arabia and international peers. This paper examines the kind of migrants Saudi Arabia wants to attract and retain. It then looks at some of the literature on what makes countries attractive to migrants, which provides a framework for assessing the success of Saudi Arabia and its GCC peers in attracting that talent. This analysis leads to recommendations for policies that could make the Kingdom more competitive.

3. Monerah Abdullah Almahmoud

High-Skilled Employment and Vision 2030. Education and Training for Saudi Youth Alignment with Saudi Labor Market Demands

Research Report - Abstract

Vision 2030, Saudi Arabia's ambitious reform plan, aims to diversify the economy and reduce dependency on oil by fostering a competitive, knowledge-based economy. Central to this vision is the development of a highly skilled workforce. This paper explores the intersection of education, training, and labor market demands, focusing on the preparation of Saudi youth for high-skilled employment. The paper provides an analysis of the education and training landscape for Saudi youth, in relation to the evolving demands of the labor market for high-skilled employment in sectors such as healthcare, engineering, and technology, within the framework of Saudi Arabia's Vision 2030. By examining education outcomes, training programs, and the alignment between supply and demand for high-skilled jobs, this paper identifies the opportunities and challenges facing the Saudi Arabia in development of high skilled workforce and explores gender disparities and the qualifications gap in high-skill employment, offering recommendations for empowering Saudi youth to meet future labor market needs. The paper concluded with the broader implications for migration trends.

4. Ameena Almeer, Misba Bhatti, Zahra Babar

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

Research Report - Abstract



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This research report explores Qatar's labor migration policies and their impact on highly skilled migrants to the country. Despite a unified labor law, practical differences exist in how various migrant tiers are integrated into the labor 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 labor market dynamics. Since 2017, Qatar has implemented significant labor 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 "Qatarization" policies on highly skilled migrants. The authors analyze 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.

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5. Yusra AlShanqityi

Trends and Dynamics of Highly Skilled Migration in Saudi Arabia: A Report

Research Report - Abstract

This report analyses the trends, dynamics, and policies regarding highly skilled migration in Saudi Arabia. The Kingdom of Saudi Arabia is increasingly becoming a crucial destination in the global talent competition market. While the kingdom has historically been a significant destination for low-skilled migrants, Saudi Arabia and other Gulf Cooperation Council (GCC) countries have realized the need to diversify and decarbonize their economies. Prioritizing high-skilled migrants is a measure for which global economies compete. According to the national transformation plan Vision 2030, attracting high-skilled migrants is crucial in transforming the country into a knowledge-based, innovation-driven economy. This transformation includes introducing new social and economic policies that benefit high-skilled migrants and their families. These policies offer social protection, extended stays, and career prospects for talent arriving in Saudi Arabia. Recent labor-related measures include the new premium residency card scheme and allowance for property ownership. The report examines current policies, their background, and future policy directions in the context of Vision 2030. It analyses the effectiveness of recent initiatives in attracting and retaining skilled professionals, particularly in strategic sectors such as technology and healthcare. The study reveals that while Saudi Arabia offers competitive advantages through tax-free salaries and massive development projects, challenges remain in areas such as permanent residency pathways and knowledge transfer mechanisms. The report concludes with recommendations for enhancing Saudi Arabia's position in the global competition for talent while maintaining a balance with local workforce development.



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6. Ali Belhaj

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

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Research Report - Abstract

This report investigates the dynamics and policies driving highly skilled migration from Tunisia to the Gulf Cooperation Council (GCC) countries, focusing on Qatar, Saudi Arabia, and the UAE. The analysis aims to assess the implications of highly skilled emigration to the Gulf for Tunisia, a key sending country, examines shifts in migration patterns, highlights the drivers of highly skilled emigration, and analyses the governance framework surrounding highly skilled migration from Tunisia to the Gulf states.

Tunisian migration to the GCC is characterized by increasing numbers of young, educated professionals, with women forming a significant portion of this migrant population. This skilled migration aligns with the demand in sectors like healthcare and education in the GCC, mainly influenced by structured channels such as the Tunisian Agency for Technical Cooperation (ATCT). However, recent years show a decrease in placements to GCC countries, likely due to economic and political changes in the region and to the attractiveness of some European and North American destinations.

Tunisian agencies, including the ATCT, face challenges in meeting recruitment needs in the Gulf states due to limited resources, inter-agency competition, and a fragmented governance framework. While there is a significant demand for skilled Tunisian workers, the country's migration discourse often presents an alarmist view of migration as a "brain drain," which contradicts policies that promote migration opportunities. This inconsistency reflects a lack of strategic clarity in Tunisia's migration policy and highlights the inefficiencies resulting from disjointed institutional approaches. To effectively manage skilled migration and address domestic employment challenges, there is a pressing need for better policy alignment in Tunisia. The report advocates for a comprehensive national migration strategy to streamline inter-agency efforts and create a clear, unified policy. This should involve establishing a centralized body to enhance coordination, developing bilateral agreements to protect Tunisian workers abroad, and fostering local employment incentives to mitigate the effects of migration on Tunisia's skilled labor pool.

7. Sylvain Côté

Adapting to Change: Demographics and Technology in the Saudi Labour Market

Research Report - Abstract



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The research looks at two inter-related questions: To what extent are different groups of workers in the Saudi labour market exposed to potential automation, and what policy pathways can be implemented to mitigate these exposures? Using Frey and Osborne's estimates on the probability of automation, the paper examines the impact of technological advancements on Saudis and non-Saudis across sectors and occupations. The study shows that workers have generally been less affected by technological change due to policy choices and the nature of economic development in the post-Vision 2030 era. However, looking forward, strong demographics and skill-biased technological change will necessitate an enhancement in education and training systems to better deal with these challenges and to ensure better future labour market outcomes.

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8. Binod Khadria

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

Research Report - Abstract

Forthcoming

9. Froilan Malit

From Laissez Faire to a Centralized State Approach? A Critical Policy Analysis of the UAE's Attraction and Retention Approach Towards High-Skilled Migration in the Post-COVID-19 Era

Research Report - Abstract



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How do host states attract and retain highly skilled migration in the Gulf Cooperation Council (GCC) countries? Despite regional and global polycrises over the past two decades, the GCC states have strategically maintained a strong 'global migration hub,' hosting at least 28 million migrants in the Global South. As part of their modernization efforts, GCC countries have also implemented domestic socio-legal policies to attract and retain highly skilled migrants, reshaping the existing social contract between GCC states and migrant populations. However, despite such critical junctures, existing literature tends to obscure both the historical and contemporary evolution of GCC states' policies toward highly skilled migration and their domestic and geopolitical consequences, specifically in a post-COVID-19 pandemic era. 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 highly centralized state governance model, thereby enhancing its long-term competitiveness in the regional and global labor market. Secondly, despite the UAE's success in attracting highly skilled migrants through domestic legal reforms such as golden visas, retention issues persist. This ultimately leads to the transit of highly skilled migrants to Europe and North America. Thirdly, although the growing centralization approach has further institutionalized over time, highly skilled migrants in the UAE have continued to face a series of various labor 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 such as state officials, private sector actors, immigration consultants, UAE migration experts, and highly skilled migrants from Egypt, India, and the Philippines. I also draw policy insights 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 centralized strategies for attracting and retaining highly skilled migrants and their consequences in the UAE labor market.

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10. Anju Mary Paul, Kurt Kuehne, Kareem El-Rafei and Bedoor AlShebli

Enhancing Saudi Arabia's Research Ecosystem

Research Report - Abstract



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Saudi Arabia's Vision 2030 aims to transform Saudi's oil-dependent economy into a more diversified and innovative one. Central to this mission is the development of scientific innovation hubs in the country centered around its universities. This has led to increased demand for qualified personnel with the requisite scientific training and skills to produce research in the priority areas identified by the Saudi government. But has this vision of increased research productivity materialized? Our empirical analysis of an open-source dataset, consisting of approximately 240 million publications and spanning over a century of scientific research, reveals a significant increase in the number of authors, productivity, and impact of research articles published by Saudi institutions over the past decade, with KAUST the clear leader. We also conducted an online survey of 152 non-native faculty and postdoctoral researchers working in either the biological sciences or computer science at Saudi universities. Aligned with our big data analysis, faculty survey respondents reported an improvement in their research productivity after moving to Saudi and expressed strong job satisfaction. However, follow-up interviews with 32 faculty members across 11 universities in the country revealed six key research challenges: (1) Insufficient and hard-to-access research funding, (2) workload and time management issues, (3) inadequate research facilities and supply chain issues, (4) the lack of availability and poor quality of research support staff and students, (5) a lack of career advancement opportunities and job insecurity, and finally, (6) inefficient research administration and management. The prevalence of these issues varied across different types of universities but, taken together, our findings highlight specific areas the Saudi government should focus on in order to strengthen its nascent university research ecosystem and make the country more attractive to overseas scientific talent.

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11. Nasra M. Shah and Memoona Qazi

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

Research Report - Abstract



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Pakistan was among the first South Asian countries to send substantial numbers 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 skilled 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 percent 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.

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12. Mehmet A. Soytaş

Future Skills Needed and Profiles of Workers: Ways to maximize Productivity of Labor

Research Report - Abstract

The labor market in Saudi Arabia is currently undergoing substantial policy reforms as part of the broader Vision 2030 masterplan, aimed at equipping the workforce with the skills necessary to meet future job market demands. With a youthful and increasingly educated population, the labor market has seen significant growth in female participation and a gradual shift from public sector employment to a more dynamic private sector. This transition reflects evolving skill requirements and new career pathways, signaling the country's commitment to fostering a more competitive and diversified economy. At the core of these efforts is the recognition that labor productivity plays a crucial role in driving economic growth, and the demand for future skills is increasingly focused on enhancing this productivity. Central to the discourse is the necessity of acquiring the requisite skills to facilitate a smoother transition from school to the workplace, as well as the ongoing need for upskilling through on-the-job training for individuals navigating mid-career transitions. This report analyzes key labor market trends in Saudi Arabia using data from official statistics provided by the General Authority for Statistics (GaStat) and reports published by the National Labor Observatory, identifies critical skill needs, and offers actionable strategies to maximize productivity of labor. Specifically, it aims to elucidate shifts in the occupational structure, identify high-demand occupations, and examine corresponding developments on the supply side, including potential mismatches, and the future demand for immigrant workers.



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13. Jorge Tigno, Geoffrey Ducanes

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

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Research Report - Abstract

The Philippines has long been a major labor-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, emphasizing their vulnerability to abuse and exploitation. Recently, countries in the region have made changes in their labor and migration policies intended to attract more skilled professionals.

This paper examines the migration of highly skilled Filipino workers to the Gulf in the context of the policies in receiving countries intended to entice them to live and stay in the region and within the broader framework of the Philippines' overseas employment program that has been in place since the mid-1970s. Using survey and administrative data, including the Surveys of Overseas Filipinos (SOF), the 2018 National Migration Survey (NMS), and data from the Department of Migrant Workers (DMW), this paper analyzes the profiles and migration patterns of highly skilled Filipinos in the Gulf.

Findings suggest that Philippine migration policy often overlooks distinctions between high- and low-skilled migrants, with bilateral labor agreements (BLAs) largely focused on protecting low-skilled workers, particularly domestic workers. While many highly skilled Filipinos migrate to the GCC, a number also aspire to eventually relocate to Western countries where wages are higher, and settlement opportunities are more robust. To address this, Gulf labor policies may require recalibration beyond specific incentives like Golden and Freelance visas, addressing skilled migrants' broader career and settlement aspirations.

14. Bilesha Weeraratne

A View from South Asia Countries of Origin: Changing Contexts, Perceptions and Policies towards Migrating to Saudi Arabia

Research Report - Abstract

As the strongest Arab economy, KSA is home to 13.4 million foreign residents. Hence, much of the success of the ambitious Vision 2030 reform masterplan hinges upon how migrant labour is considered within these reforms. This makes enhancing the understanding of migration dynamics in the Saudi socio-economic context critical.



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Against this backdrop, this paper aims to expand the understanding of drivers, policies, and perceptions linked to migration to KSA from South Asian countries of origin. The report brings out how the migration stakeholders in South Asian countries of origin perceive the institutional context and migratory environment in Saudi Arabia, and how their perceptions shape labour migration from these countries of origin. Additionally, the study also examines how future changes in migration policies, and socio-political and economic dynamics in South Asian countries of origin influence labour migration to Saudi Arabia.

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The study adopts a corridor approach by focusing on South Asian countries including Bangladesh, India, Pakistan, and Sri Lanka. The analysis relies on existing literature and secondary data supplemented by qualitative data collected via key informant interviews, where possible.

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Gulf Labour Markets, Migration, and Population (GLMM) Programme

<https://gulfmigration.grc.net>

T +966 55 561 9995 (Layla Ali)

Konrad-Adenauer-Stiftung (KAS)

Regional Programme Gulf States (RPG)

<https://www.kas.de/en/web/rpg>