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Abu Dhabi Dialogue among the Asian
Labour-Sending and Receiving Countries

ON UNLOCKING THE ROLE OF SKILLS AND DIVERSITY FOR LABOUR PRODUCTIVITY IN ABU DHABI DIALOGUE MEMBER STATES

FRAGOMEN

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COMPARATIVE INSIGHTS AND FORWARD-LOOKING STRATEGIES FOR SKILLED MIGRATION MANAGEMENT

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Executive Summary

Governments across the ADD corridor are adopting a combination of skilled migration and nationalisation strategies to support labour productivity and economic diversification. Skilled migration policies enable countries to address immediate skills shortages and access specialised expertise, while supporting high-growth sectors where domestic talent pipelines are limited or require time to develop. In turn, nationalisation strategies aim to strengthen the long-term formation of human capital, increase the participation of the domestic workforce in the private sector and reduce structural dependence on foreign labour. In practice, these approaches complement each other rather than being mutually exclusive, with most GCC countries adopting hybrid models that balance targeted international recruitment with sustained investment in education and upskilling the domestic workforce.

Section 1 provides a regional context of skilled migration in the ADD corridor. Demand for skilled labour has increased fourfold between 2015 and 2023, particularly in ICT, healthcare, advanced manufacturing and clean energy. GCC countries have developed national classification systems linked to diversification strategies, while labour-sending countries rely mainly on certification and vocational frameworks. However, definitions of skilled work remain divergent and historical migration pathways continue to show uneven access to higher-value opportunities.

Section 2 examines the current status of skilled migration in the corridor. Foreign workers account for more than half of the GCC's population, with Asian workers forming the majority of the labour force. Recruitment pipelines meet demand in certain sectors such as construction and hospitality, but shortages persist in health technology, advanced engineering, artificial intelligence and renewable energy. Employer survey results show reliance on in-house training and direct recruitment to address skills gaps, while government-led platforms remain underutilised. For labour-sending countries, expanded training systems have improved supply, but access remains uneven and concentrated in urban centres.

Section 3 reviews the policy drivers shaping skilled migration in the GCC. Long-term residency schemes have been introduced to attract and retain highly skilled professionals but remain restricted to a narrow group of workers. Nationalisation frameworks have increased citizen participation in finance, professional services and consulting, but GCC economies continue to rely on migrant workers to provide technical expertise in several strategically important sectors, including ICT, engineering and healthcare. This reflects a complementary workforce model where nationals occupy supervisory and client-facing roles, while migrant workers bolster advanced technical functions.

Section 4 focuses on upskilling and reskilling initiatives. GCC governments are prioritising digital skills and artificial intelligence to prepare citizens for future private sector roles. Labour-sending countries are expanding technical and vocational systems, international certification and training in emerging sectors to support both domestic growth and overseas employment. Private sector initiatives also play a role, though challenges remain in programme completion, women's participation and bridging the time lag between training and productivity.

To strengthen skills mobility and productivity across the ADD corridor, this report recommends:

1. Consolidating and expanding mechanisms for skills verification and credential recognition;
2. Harmonising classifications frameworks corridor-wide to enable consistent recognition and mobility;
3. Designing immigration pathways that include a wider range of skills profiles, not only investors or senior professionals;
4. Expanding public–private partnerships to support training and extend access to SMEs;
5. Embedding inclusivity in skills and nationalisation policies, with specific attention to women, SMEs and rural workers;
6. Harnessing return migration through targeted programmes and incentives for returning professionals; and
7. Investing in cross-regional collaboration platforms and data tools to monitor trends and coordinate policy interventions.

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FOREWORD

Skills and diversity are increasingly recognised as key drivers of productivity, innovation and sustainable economic growth. Demographic shifts, rapid technological advancements, climate change and evolving labour market demands are prompting governments and employers to focus on building a highly skilled and adaptable workforce. These dynamics are particularly significant within the Abu Dhabi Dialogue (ADD) corridor, where labour mobility plays a central role and workforce capabilities must align closely with national development priorities.

Despite sustained investments in skills development and migration systems, challenges remain in addressing skills shortages and mismatches, scaling upskilling and reskilling initiatives and incorporating diversity considerations in labour market policies. Recognising these challenges, the Seventh ADD Ministerial Declaration in 2024 identified skills as a critical lever for enhancing productivity and driving economic diversification. Member States tasked the ADD Secretariat with undertaking a thematic research study to analyse the evolving skills landscape in the corridor, including workforce demographics and composition, opportunities for upskilling and reskilling in the context of emerging technologies and strategies for promoting sustainable labour market growth.

In response, this policy paper examines these dynamics and outlines actionable pathways for policymakers and the private sector in the ADD region. The research methodology combines:

- Desk-based legal and policy analysis;
- A dedicated survey shared with private sector companies and International Organisation of Employers (IOE) members across the ADD corridor; and
- Interviews with immigration experts.

The results of this study will be presented at the Eighth ADD Ministerial Consultation, which is scheduled to take place in January 2026. Special thanks go to Fragomen LLP and the team comprising Mona Ahmed, Aiswarya Shybu, Ali Haider, Murtaza Khan, Marcin Kubarek, and Ana Sofia Walsh, as well as IOE members and IOE team comprising Akustina Morni and Stéphanie Winet.

1. REGIONAL CONTEXT OF SKILLED MIGRATION

Skills mobility is central to future productivity, technological transformation and inclusive growth across the ADD corridor. The ADD corridor bridges some of the world's top destinations for skilled migrants with some of the world's leading exporters of talent. From 2015 to 2023, the flow of skilled migration within the ADD corridor increased fourfold, from 780,000 to 3.36 million (ADB, OECD and ILO, 2024). While GCC countries have historically represented the top destinations for skilled migrants within the ADD corridor, on the supply side, several Asian countries have significantly scaled up their vocational and technical training programmes to meet demand, though gaps remain.

1.1 Defining Skilled Work

Defining what constitutes skilled work is central to shaping migration frameworks and upskilling systems across the ADD corridor. For the purposes of this report, skilled work refers to occupations requiring higher education, technical ability or professional training in knowledge-intensive or specialised sectors.

Table 1: ILO and OECD Approaches to Defining Skills

ILO approach	OECD approach
The International Labour Organization's (ILO) International Standard Classification of Occupations (ISCO) defines skill as the ability to carry out the tasks and duties of a given job and typically classifies the first five major occupation groups as skilled workers: managers, professionals, technicians and associate professionals, clerical support workers, and service and sales workers (ILO, 2025).	Complementing this, the OECD promotes a broader skills-first approach that highlights cognitive, technical, transversal and disruptive skills, emphasising adaptability and the capacity for ongoing learning as being equally important as formal academic or vocational credentials (OECD, 2025).

Source: ILO (2012), International Standard Classification of Occupations: ISCO-08; OECD (2023), Skills Outlook 2023: Skills First.

With the advent of Industry 5.0[1], these definitions are expanding further. The new paradigm emphasises humancentric, sustainable and resilient production, prioritising not just technical proficiency but also hybrid competencies such as adaptability, creativity and cross-cultural collaboration as central to workforce productivity and competitiveness (ESCWA, 2023; WEF, 2025). International practice further highlights that relevant work experience can complement or, in some cases, substitute formal education, as illustrated by qualification frameworks within the European Union (EU).

[1] Industry 5.0 places the wellbeing of the worker at the centre of the production process and uses new technologies to provide prosperity beyond jobs and growth, while respecting the production limits of the planet. It complements Industry 4.0 by specifically putting research and innovation at the service of the transition to a sustainable, human-centric and resilient industry (European Commission, 2021).

ADD countries apply divergent but evolving definitions of skilled work, tailoring systems to broader national or strategic needs. Most GCC countries have developed occupational classification frameworks that integrate skills assessment with their economic diversification goals.

- **The United Arab Emirates (UAE):** Employs an ISCO-based system adopted by the Ministry of Human Resources and Emiratization (MOHRE), incorporating post-secondary education certificates and wage thresholds for skills classification (UAE Government Portal, 2025; Federal Competitiveness and Statistics Centre, 2025).
- **Saudi Arabia:** Utilises a multi-factor approach through the Saudi Standard Classification of Occupations (SSCO), developed by the Ministry of Human Resources and Social Development (MHRSD) and built upon the ILO's ISCO framework, but adjusted to the country's specific needs (Hertog, 2014). The system integrates education, professional experience and accreditation requirements.
- **Qatar:** Maintains a comprehensive occupational classification system managed by the Ministry of Labour, featuring the Qatari Standard Classification of Occupations with 3,717 job titles. However, the system lacks formal salary or education thresholds for defining skilled versus unskilled categories, relying instead on broad occupational groupings (Ministry of Communications and Information Technology, 2025; Qatar Tribune, 2024).
- **Oman:** Implements a competency-based National Occupational Standards (NOS) strategy under Vision 2040, launched by the Ministry of Labour to establish unified professional frameworks that align education and training with labour market requirements (Vision Oman 2040, 2023; Oman News Agency, 2025).
- **Bahrain and Kuwait**: Apply less structured approaches with wage-based or credential-based distinctions for skilled worker classification, with Bahrain offering tiered minimum wages based on educational qualifications and Kuwait maintaining basic wage thresholds for different worker categories (GLMM, 2017; Asian Development Bank, 2024).
- By contrast, many labour-sending countries primarily use vocational certifications and educational credentials to classify skills, rather than wage-based thresholds or broad occupational categories. This approach emphasises the formal recognition of competencies through structured training programmes and standardised assessment systems. In doing so, these countries are facilitating international mobility and repositioning labour migration within a broader agenda of skills governance. They are seeking to future-proof their workforces by aligning national certification frameworks with international labour market requirements.
- **India**: Employs NSDC (National Skill Development Corporation) through Sector Skills Councils (SSCs) to certify trades across priority industries, developing National Occupational Standards and conducting competency-based assessment aligned with the National Skills Qualifications Framework (NSQF) (NSDC, 2024).
- **Pakistan**: Administers Recognition of Prior Learning (RPL) schemes through NAVTTC (National Vocational and Technical Training Commission) that validates skills acquired through informal training systems and issues certificates under the National Vocational Qualifications Framework (NVQF) (NAVTTC, 2024).
- **Philippines**: Utilises TESDA (Technical Education and Skills Development Authority) to integrate technical competency testing with comprehensive preparation for overseas deployment through the Philippine TVET Qualifications and Certification System, ensuring workers meet international standards (TESDA, 2024).
- **Bangladesh**: Uses the National Technical and Vocational Qualifications Framework (NTVQF) administered by the Bangladesh Technical Education Board (BTEB) under the National Skills Development Council (NSDC). The system includes Recognition of RPL for workers returning from overseas and competency-based certification across multiple skill levels (BTEB, 2024).

- **Nepal**: Operates through the Council for Technical Education and Vocational Training (CTEVT) and National Skill Testing Board (NSTB), which has developed National Occupational Skill Standards for 237 occupations and certified over 72,000 crafts-persons through competency-based testing (CTEVT, 2024; NSTB, 2024).

1.2 Historical Evolution of Skilled Migration Pathways

Labour migration to the GCC shows a rapid transition of skills that aligns with broader economic development and diversification trends. Before hydrocarbons were discovered in the 1930s, GCC economies relied heavily on pearl diving, fishing and small-scale trade, with minimal reliance on foreign labour (GLMM, 2017). The 1973–82 oil boom triggered a 300% increase in foreign workers, rising from approximately 1.25 million in the early 1970s to 4.4 million by 1985 to support massive infrastructure development projects and heightened participation in construction, industrial facilities, utilities and government services sectors (Shah, 2013; ILO, 2017).

This pattern persisted for decades. By 2010, migrant workers from labour-sending countries across the ADD remained concentrated in low-skilled sectors such as construction and domestic service, with limited opportunities for skilled professionals (World Bank, 2016; ILO, 2018).

The 2007–2009 financial crisis exposed certain vulnerabilities of oil-dependence and prompted several GCC states to carry out a strategic re-evaluation of their economic models. Falling oil prices and economic volatility highlighted the need to reduce dependence on hydrocarbon revenues. In response, GCC countries adopted national development strategies that prioritise knowledge-based economic sectors and diversify beyond oil and gas. This shift laid the groundwork for new skilled-migration pathways in technology, healthcare, finance and clean energy. (IMF, 2011; Hertog, 2014; World Bank, 2020).

Table 2: Overview of National Development Strategies in GCC Countries

GCC Country	Strategy Name	Economic Pillar	Sectors Promoted
Bahrain	Vision 2030	Building a sustainable, privatesector-led economy through investment in human capital, entrepreneurship, and environmental sustainability	• Finance • Technology • Tourism • Healthcare • Manufacturing and logistic
Kuwait	Vision 2035	Transforming Kuwait into a regional financial and trade hub through private-sector-led growth and integration of national talent	• Finance • Infrastructure and construction • Smart economy and digital transformation • Renewable energy • Tourism • Private-sector development,
Oman	Vision 2040	Diversifying the economy toward a knowledge- and innovation-driven model with a focus on sustainability and regional development	• Green energy and hydrogen • Tourism and hospitality • Circular economy and waste management • Smart city development
Qatar	Qatar's National Vision 2030	Transforming the economy into a competitive, diversified, and knowledge-based system, shifting from oil dependence to one based on knowledge, skills, and services	• Finance • Technology (AI, fintech, digital transformation) • Sports • Education
Saudi Arabia	Vision 2030	Increasing the share of non-oil exports in non-oil GDP to 50%	• Renewable energy • Healthcare and medical services • Logistics and supply chains • Tourism and entertainment • Digital services and technology
UAE	UAE Vision 2031	Promoting a diversified economy that grows at a high rate and focuses on new strategic areas and advanced industries	• Digital economy, ICT, communication services • Financial technology and logistics • Tourism • Sustainable energy and green economy

Source: UAE Government (2023), We the UAE 2031; Kingdom of Saudi Arabia (2016), Vision 2030; State of Qatar (2008), Qatar National Vision 2030 and Planning and Statistics Authority (2024), Third National Development Strategy 2023–2024; Sultanate of Oman (2019), Vision 2040; Kingdom of Bahrain (2008), Economic Vision 2030; State of Kuwait (2017), Vision 2035: New Kuwait.

These economic diversification efforts have shown measurable results in some member states. By 2024, non-oil sectors accounted for 75.5% of UAE GDP (Federal Competitiveness and Statistics Centre, 2025), while Saudi Arabia's non-oil economy grew by 4.5% in 2024 (IMF, 2025).

In parallel, labour-sending countries across the ADD corridor have also recalibrated their migration strategies. Historically, talent flow has been segmented in the corridor: workers with lower levels of education moved to the GCC for construction, agriculture and domestic service, while workers with higher education or specialised qualifications tended to pursue opportunities in OECD countries through study-to-work and skilled-visa channels (Docquier & Marfouk, 2006; ILO, 2017).

Since 2010, that divide has blurred. GCC diversification has generated demand for mid- and high-skilled roles and origin countries have subsequently upgraded their training and higher-education systems to strengthen international recognition of credentials without targeting a single destination market (OECD, 2022). As a result, migrants across the skills spectrum are now present in Gulf labour markets alongside large low-skill cohorts, including in ICT, finance, healthcare and advanced manufacturing (ILO, 2017; GLMM, 2017; OECD, 2022).

Concrete reforms illustrate this shift. In the Philippines, TESDA's Caregiving/Health Care Services qualifications and the Commission on Higher Education (CHED)'s outcomes-based BS Nursing standards have expanded pipelines that meet both domestic healthcare needs and international licensing requirements (TESDA, 2022; CHED, 2017). In India, the expansion of IT and engineering programmes has strengthened the country's role as a global hub for technology talent, while also supporting domestic industries, with sustained demand for high-skilled channels in key OECD countries (OECD, 2022; USCIS, 2019). Pakistan and Bangladesh have scaled competencybased TVET and Recognition of Prior Learning under national qualifications frameworks, reforms that improve employability at home and facilitate overseas mobility, with substantial support from multilateral partners (NAVTTC, 2023; World Bank, 2021; ADB, 2024).

In summary, this section highlights both the conceptual and historical foundations of skilled migration in the ADD corridor. Definitions of skilled work remain divergent across member countries, reflecting frameworks that range from ISCO-based occupational systems and wage thresholds in the GCC to competency-based qualifications in many labour-sending countries. These definitional differences shape how migrants are classified and, in practice, mean that a worker recognised as skilled in one system may not be treated as such in another. At the same time, the expansion of skilled-migration pathways has not benefited all groups equally: countries with stronger training and certification systems have been better able to channel workers into high-value sectors, while others remain concentrated in lower-wage roles.

2. CURRENT STATE ASSESSMENT

Labour migration patterns across the ADD corridor reveal both the scale of reliance on foreign workers and imbalances in how skills are supplied and utilised. GCC countries remain among the largest global destinations for migrant labour, while Asian countries continue to provide the majority of workers at varying skill levels. Assessing current demographics, demand trends and recruitment pipelines highlights where alignment has been achieved and where structural gaps continue to constrain skills mobility.

2.1 Workforce Demographics and Skills Composition

GCC countries rely heavily on foreign labour. The region was the world's third most popular migration destination in 2024, hosting over 10% of the global migrant population (up from 5% in 1990). Foreign nationals now account for more than half of the total population and in the UAE, Qatar and Kuwait, they constitute more than two-thirds of all residents. The majority of these migrant workers originate South and Southeast Asia. While there is no official data on exact numbers, international sources estimate that Asian nationals account for 75% to 85% of the migrant workforce, with particularly large communities from India, Pakistan, Bangladesh and the Philippines (ESCWA, 2025).

To reduce overreliance on a narrow group of nationalities, GCC countries have introduced measures to promote workforce diversity and expand their talent pool. While the precise thresholds and implementation details are generally not made public, some GCC countries apply nationality caps to prevent any single nationality from dominating sectors or individual workplaces. These efforts complement the ongoing diversification of recruitment channels, which aim to include a wider range of countries, particularly for skilled and semi-skilled occupations (ESCWA, 2024).

Skills Composition of Asian Workers Working in the GCC

The skill profile of Asian migrants working in the GCC vary across origin countries. The majority remain in low- and semi-skilled roles, predominantly in construction, hospitality, domestic labour and basic administrative work (see Figure 1).

- For Bangladesh and Indonesia, more than half of all workers deployed in 2023 were classified as lowskilled or had received basic education, while skilled categories represented less than a quarter of all workers.
- Pakistan and Sri Lanka supply larger proportions of semi-skilled and skilled workers, with Pakistan's skilled workforce approaching 50%.
- The Philippines and Sri Lanka have the most diverse skill sets: between 8 to 12% of Filipino workers enter managerial or professional roles, with significant numbers in technical and clerical positions.
- Nepal has seen a rapid rise in skilled migration since 2022/23, following the expansion of its TVET system (ADB, OECD and ILO, 2024).

Figure 1: Workers by Skills Category, Selected Origin Countries (2015-2023)

Note: Categories are those reported in national data.

Source: ABD, OECD and ILO (2024), Labour Migration in Asia based on data provided by national authorities of origin countries.

Gender Dimensions

The gender profile of Asian migrant workers in the GCC reveals significant disparities. Male workers dominate roles in construction, manufacturing, and technical trades, with participation rates regularly exceeding 80%. In contrast, women account for less than 20% of skilled migrants overall. They are more represented in education and healthcare but remain underrepresented in Information and Communication Technologies (ICT) and engineering (ESCWA, 2023). This pattern is not unique to the GCC: while in OECD countries women make up close to 50% of skilled migrants, they also remain underrepresented in ICT and engineering roles (ESCWA, 2023).

Female migrants from the Philippines and Sri Lanka are widely represented in domestic work, care, and nursing roles in the GCC (ADB, OECD and ILO, 2024). Within domestic work, certain sub-sectors like cleaning staff, nannies, and child caregivers are strongly feminized and predominantly staffed by women from these countries. In contrast, other roles within the broader category, such as car drivers, cooks, and garden help, tend to attract higher numbers of male workers.

2.2 Mapping Skills Demands in GCC countries

Mapping the demand for skills across GCC countries reveals a mismatch between economic diversification priorities and the availability of trained labour. Sectors can be broadly divided into three categories: those where supply is well established, those where training pipelines exist but advanced competencies remain insufficient and those in which demand outpaces training capacity almost entirely.

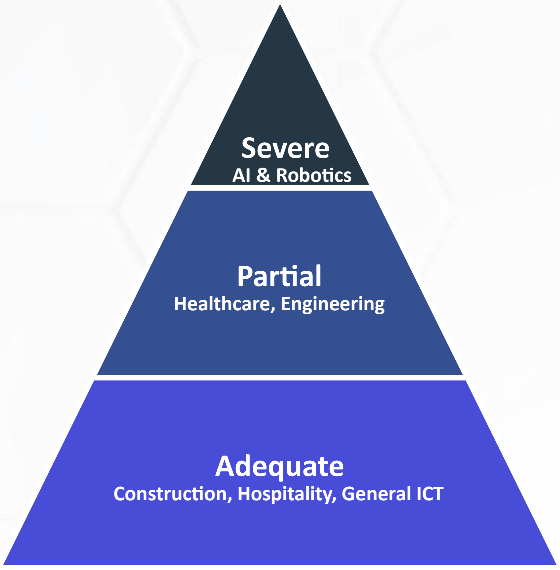
Sectors with adequate supply benefit from long-standing training-to-placement linkages between labour sendingcountry institutions and GCC employers. Construction, hospitality and general ICT support roles are reliably filled through vocational institutions in India, Pakistan, Bangladesh and the Philippines. These patterns reflect the continued reliance on migrant labour in these sectors and the maturity of recruitment pipelines connecting origin and destination labour markets (ILO, 2017; GLMM, 2017).

Sectors where pipelines do not cover higher-level roles show a different pattern. In healthcare, large numbers of nursing graduates are produced by institutions such as TESDA in the Philippines and NSDC International in India, providing steady coverage for general care roles; however, specialised health-technology positions such as biomedical technicians, radiology staff and informatics specialists remain undersupplied (ESCWA, 2024; Vision 2030 Health Sector Transformation Program, 2024). Engineering demonstrates a similar trend: civil and mechanical roles are broadly covered, while advanced disciplines such as process, biomedical and systems engineering face persistent shortages (OECD, 2022; ILO, 2017).

Emerging and advanced sectors face the most severe gaps. The regional supply of artificial intelligence and robotics specialists remains limited: recent estimates indicate around 5,000 AI specialists in Saudi Arabia and 7,000 in the UAE, compared with 40,000+ in Germany (BCG, 2025). Renewable energy is similarly constrained. While solar installation skills are available in several origin countries, expertise in grid integration, offshore wind and hydrogen systems remains scarce (IEA, 2024; World Bank, 2024; WEF, 2024).

These shortages highlight the widening gap between the current supply of skills and the workforce targets set out in GCC national strategies. For example, Saudi Arabia's Vision 2030 and the UAE's Energy Strategy 2050 are setting ambitious goals for investment, renewable energy deployment and workforce development. Specifically, the UAE Energy Strategy 2050 aims to triple the contribution of renewable energy and create 50,000 new green jobs by 2030 in pursuit of net zero targets. Such national roadmaps underscore both the scale of transformation underway and the urgency of aligning workforce development with energy transition priorities.

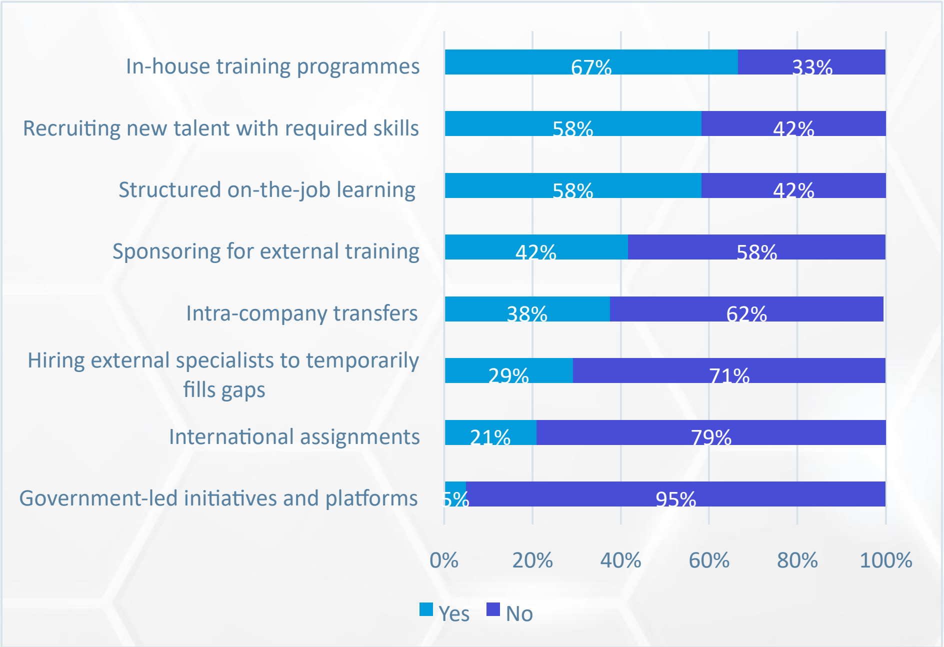
Figure 2: Mapping skills demand and supply alignment in GCC countries



Source: ILO (2017); GLMM (2017); ESCWA (2024); OECD (2022); BCG (2025); IEA (2024); World Bank (2024); WEF (2024).

Employers across the corridor have developed their own responses to these mismatches. Survey data shows that in-house training (67%) and direct recruitment (58%) are the dominant strategies, while only 5% of employers report engaging with government-led training platforms (see Figure 3).

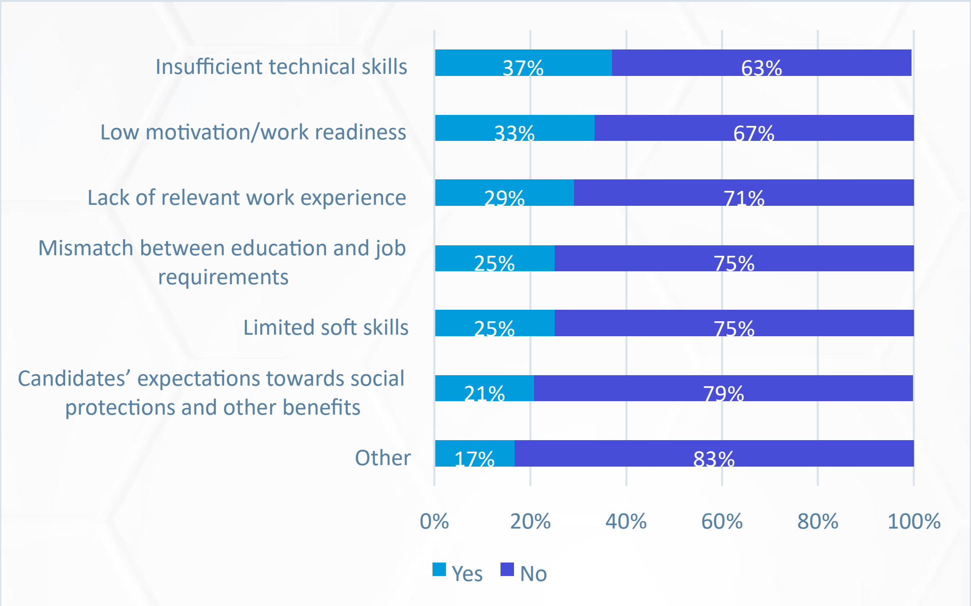
Figure 3: Employer strategies for addressing skills gaps



Source: Fragomen Survey on Assessing Workforce Skills and Upskilling Strategies in Private Sector Companies, 2025.

Despite these efforts, significant limitations within in-country talent pools persist. Employers most frequently cite insufficient technical skills (37%) and low motivation or work readiness (33%) as the main constraints (Figure 4).

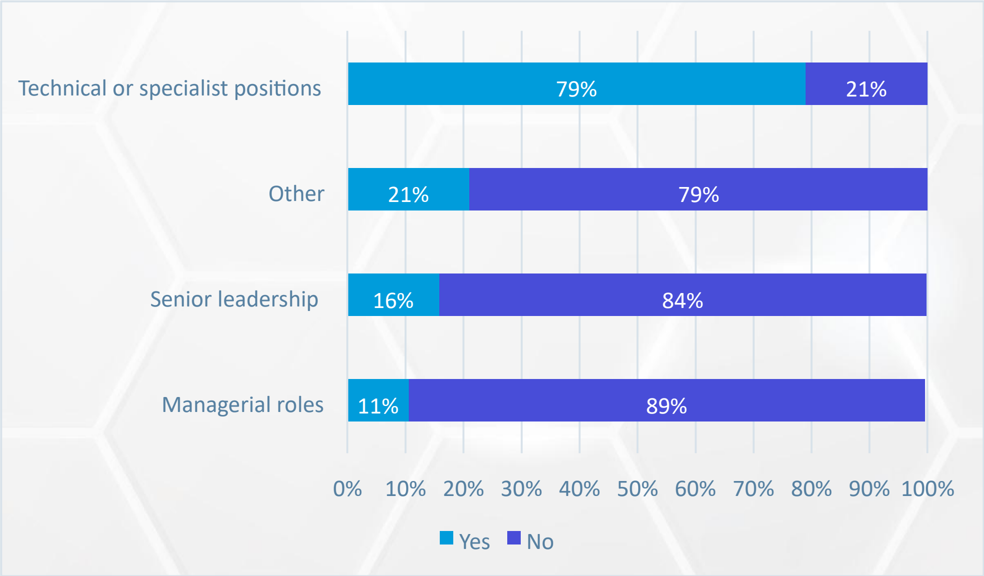
Figure 4: Reported limitations in in-country talent pools



Source: Fragomen Survey on Assessing Workforce Skills and Upskilling Strategies in Private Sector Companies, 2025.

These gaps reflect deeper structural weaknesses in national training systems and explain why employers continue to rely heavily on foreign recruitment to fill technical roles (see Figure 5). Nearly four out of five companies (79%) reported hiring foreign nationals for these positions, compared to 16% for senior leadership and 11% for managerial roles (see Figure 5). This indicates that GCC employers continue to rely most heavily on foreign workers to meet advanced technical needs, while domestic and regional labour supply sustains generalist and leadership functions.

Figure 5: Roles most commonly filled through international recruitment



Source: Fragomen Survey on Assessing Workforce Skills and Upskilling Strategies in Private Sector Companies, 2025.

Addressing these multi-level gaps requires sustained investment from both governments and employers. While public policy plays a central role in setting strategic priorities and expanding training systems, employers are essential in financing, delivering and co-designing skills development to ensure it remains relevant to the evolving needs of the labour market.

2.3 Recruitment Pipelines in Labour-Sending Countries

While Section 2.2 highlighted where skills demand is most acute in GCC labour markets, the actual patterns of recruitment reveal mismatches in how those needs are met. Migration volumes are uneven across GCC countries and labour-sending countries show clear differences in the type and level of skills they supply. These asymmetries mean that shortages in advanced roles persist, even as overall inflows remain substantial (PwC, 2024b; OECD, 2024).

Demand in ICT highlights how rapid expansion in the GCC is being met by uneven recruitment pipelines. The UAE's ICT workforce expanded between 2019 and 2023, a period marked by accelerated digital transformation under national strategies and post-pandemic recovery, largely through inflows of Indian and Egyptian professionals (PwC, 2024b; OECD, 2024). Saudi Arabia also scaled up ICT recruitment in this period, drawing from Egypt and the Philippines to support Vision 2030 projects such as NEOM and the Red Sea Development (PwC, 2024b; OECD, 2024). By contrast, Oman issued relatively few ICT-related work permits in 2023 despite rising demand under Vision 2040, while Kuwait's growth rate remained below that of the UAE. On the labour-sending side, India's NSDC Future Skills programmes dominate higher-skill ICT pipelines, whereas Pakistan and Bangladesh continue to prioritise mid-level ICT training. This results in gaps at the advanced end of the ICT spectrum, especially in AI and data science (CSIS, 2025; BCG, 2025).

Healthcare migration shows similar trends. Saudi Arabia admitted substantial numbers of healthcare professionals in 2023, while the UAE and Qatar also expanded intakes to support hospital capacity, medical tourism and World Cup legacy facilities. These flows depend heavily on sending countries: the Philippines remains the primary supplier of nurses and allied health professionals through TESDA certification, while India's nursing colleges feed recruitment agencies targeting GCC hospitals (ESCWA, 2024). Pakistan and Bangladesh contribute notable volumes in support roles but remain undersupplied in advanced medical technologies and telemedicine (OECD, 2024).

In renewables and advanced manufacturing, migration trends reflect GCC diversification priorities but highlight limits in origin-country pipelines. Saudi Arabia and the UAE have increased recruitment in these areas, sourcing engineers and technicians from Egypt, India and Indonesia. Oman and Kuwait remain more reliant on hydrocarbons, construction and mid-skilled trades, although Oman has expanded training under Vision 2040 to begin shifting toward knowledge-intensive employment (GLMM, 2025). On the sending side, Indonesia has scaled BP2MI technical training in welding and heavy equipment, while Bangladesh's supply remains concentrated in construction and ICT, with limited clean-tech coverage (IRENA/ILO, 2024; WEF, 2024).

Geographical concentration of opportunities, both in destination and origin countries, continues to shape inequalities in access. In the UAE, Dubai absorbs the majority of skilled demand, while emirates such as Fujairah and Sharjah show candidate surpluses relative to vacancies (see Figure 6). In Saudi Arabia, inflows cluster around central, eastern and western provinces where flagship projects are concentrated, while peripheral regions rely on incentives via special economic zones. On the labour-sending side, major training hubs in India, the Philippines and Pakistan remain urban-centred, limiting access for rural populations where mobility demand is highest (Horsefly, 2023).

Figure 6. Supply and demand for skilled roles across UAE emirates.

Note: The figure shows how the balance between skilled labour supply, demand and salaries differs across the UAE. In Dubai and Abu Dhabi, demand for skilled workers is far greater than local supply, which helps explain why salaries are higher there, particularly in Abu Dhabi. In contrast, Fujairah and Al Ain have more skilled workers available than jobs, and this surplus is reflected in lower pay levels. Sharjah falls somewhere in between, with a smaller shortage and moderate wages. Source: Horsefly Analytics, 2023.

In summary, the current state of skilled migration across the ADD corridor reflects both progress and persistent challenges. GCC countries continue to depend heavily on migrant labour, with Asian workers dominating inflows across low-, semi- and increasingly skilled occupations. While established recruitment pipelines reliably supply workers for sectors such as construction and hospitality, shortages remain in specialised healthcare, advanced engineering and emerging fields like AI and renewable energy. Evidence from the employer survey indicates that companies rely mainly on internal measures such as training and direct recruitment, to fill these gaps, while government-led training platforms remain underutilised.

3. KEY DRIVERS OF SKILLED MIGRATION IN GCC COUNTRIES

The drivers of skilled migration in GCC countries are shaped by a combination of policy tools and labour market strategies. Long-term residency schemes have been introduced to attract and retain highly skilled professionals, while nationalisation policies seek to expand citizen participation in the workforce. Together, these measures illustrate how GCC countries are recalibrating migration governance to balance reliance on foreign workers with domestic skills development and broader economic diversification goals.

3.1 Long-Term Residency Schemes to Attract and Retain Talent

Over the past decade, GCC countries have introduced long-term, self-sponsored residency programmes to attract investors, entrepreneurs and highly skilled professionals (see Table 3). These pathways mark a notable shift from the traditional employer sponsorship. By granting greater autonomy, governments in the region aim to attract foreign investment and mitigate persistent skills shortages in sectors such as artificial intelligence, renewable energy and advanced manufacturing.

Table 3: Overview of Long-term Residency Programmes in GCC countries

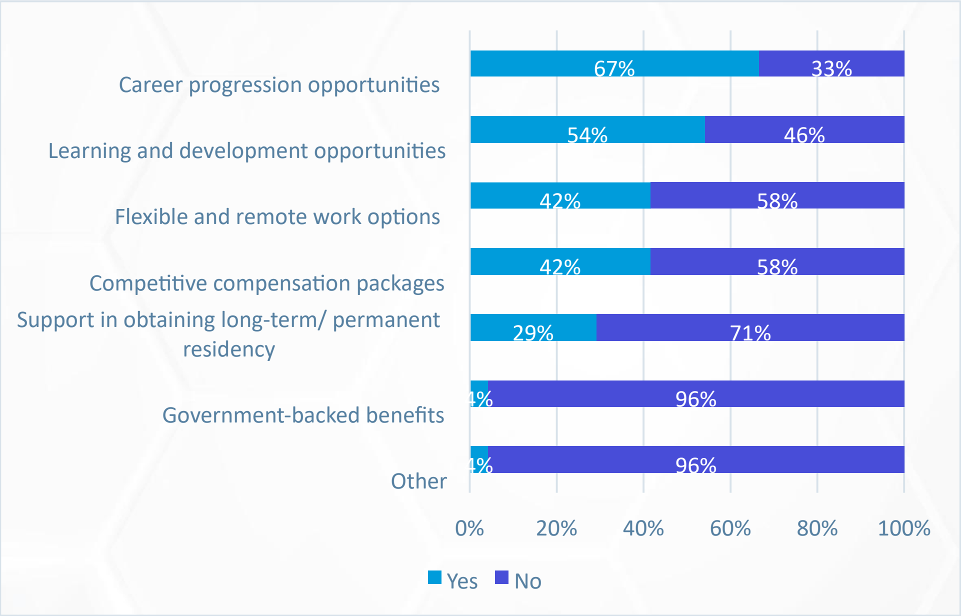
Country	Year	Residency Scheme	Validity	Target Groups
United Arab Emirates	2019	Golden Visa	10 years	Investors, entrepreneurs, scientists, highly skilled professionals, exceptional students, artists
	2022	Green Visa	5 years	Skilled professionals, freelancers, entrepreneurs
	2024	Blue Visa	10 years	Environmental specialists, sustainability experts, climate action advocates
Saudi Arabia	2019	Premium Residency Programme	5 years or permanent	Investors, entrepreneurs, skilled professionals
Oman	2021	Investment Residency Programme	5 or 10 years	Investors, business owners and retirees
Bahrain	2022	Golden Residency Programme	10 years	Investors, property owners, retirees, high-income professionals, highly skilled
Qatar	Announced in 2024 but not implemented yet	Mustaqel Programme	5 years	Talented professionals and entrepreneurs
Kuwait	2024	Amended residency regulations	10 or 15 years	Investors and property owners

Source: Fragomen.

Despite their strategic potential, these long-term residency programmes are only accessible to a select group of migrant workers. The eligibility criteria are stringent by design and are often linked to high minimum income thresholds, considerable investment requirements and proof of educational qualifications. Consequently, low- and semi-skilled migrants, who constitute the majority of the GCC's labour force from South and Southeast Asia, are unlikely to qualify.

In addition, companies surveyed across the ADD corridor highlight that support in obtaining long-term or permanent residency is insufficient to retain top talent. The highest-ranking company strategies to retain skilled employees are providing opportunities for career progression (67%) and access to continuous learning and development (54%) (see Figure 7). These findings emphasise that support in obtaining long-term residency is most effective when embedded within a wider ecosystem of professional growth and talent development.

Figure 7: Company strategies to attract and retain talent



Source: Fragomen Survey on Assessing Workforce Skills and Upskilling Strategies in Private Sector Companies, 2025.

3.2 Nationalisation Policies

Nationalisation policies are government-led measures aimed at increasing citizen participation in the workforce. In the GCC, these frameworks combine quotas, incentives, and compliance mechanisms to expand nationals' share of private sector employment. The objectives are threefold: to reduce dependence on foreign workers, to promote sustainable employment for citizens, and to support diversification strategies by balancing localisation with continued access to expatriate expertise in technical and specialist fields (ESCWA, 2024; ILO, 2024). In this sense, nationalisation policies are closely tied to the skills agenda: they shape how local education and training systems are linked to labour market demand, and they determine how expatriate workers complement national human capital strategies. The implementation of nationalisation policies is usually supported by company classification systems, which determine employer obligations and compliance levels (see Table 4).

Table 4. Company Classification Mechanisms and Nationalisation Programmes in GCC Countries

Country	Company Classification System	Nationalisation Program
Qatar	Qatar's company classification system is an internal framework managed by the Ministry of Labour. It is not publicly accessible and currently inactive. However, it consists of six categories: • Category A • Category B • Category C • Category D • Category F • Category U	Qatarisation was introduced in 1962 in the government sector. It was expanded to the private sector in 2025.
Saudi Arabia	Five color groupings: • Platinum • High Green • Medium Green • Low Green • Red	Saudisation was introduced in 1970s in the government sector. It was expanded to the private sector in 2011 through the Nitaqat system.
United Arab Emirates	Three categories: • Category 1 • Category 2 • Category 3	Emiratisation was introduced in 1998 in the government sector. It was expanded to the private sector in 2005 and later in 2021 through the establishment of the Emirati Human Resources Competitiveness Council – Nafis.
Bahrain	Data is not publicly accessible.	Bahrainisation was introduced in 1975 in the government sector. It was expanded to the private sector in 2006.
Kuwait	Data is not publicly accessible.	Kuwaitisation was introduced in 1979 in the government sector. It was expanded to the private sector by 2000.
Oman	Data is not publicly accessible.	Omanisation was introduced in 1988 in the government sector. It was expanded to the private sector in 1995.

Source: National Labour Ministries; compiled by author.

As Table 4 shows, GCC countries use different mechanisms. Saudi Arabia's Nitaqat framework applies colourcoded categories linked to localisation performance, while the UAE uses a three-tier system. Elsewhere, such as Bahrain and Oman, systems exist but are less transparent. These mechanisms illustrate how nationalisation is embedded in broader labour market governance.

Evidence suggests these policies have produced measurable outcomes for citizens. In Saudi Arabia, nationals now fill roles ranging from ride-hailing and retail services to senior management in industry, with localisation levels reported at 23% in 2022 and targets set at 30% by 2025 (PwC, 2024b; MHRSD, 2025). By the end of June 2025, more than 152,000 Emirati nationals were employed across over 29,000 private sector companies,

reflecting recordbreaking compliance with Emiratisation requirements (MOHRE, 2025). This milestone builds on annual quota announcements and employer incentives, with increased participation not only in finance, law, and consulting but also in business services, construction, trade, and other sectors. Bahrain and Oman have seen greater national involvement in banking, telecommunications, and government services, while Kuwait has focused on customerfacing roles in finance and retail (ILO, 2024; ADB, 2024). Survey data also indicates that most firms report compliance with localisation quotas, creating additional opportunities for nationals through internal promotions and targeted hiring campaigns (PwC, 2024b).

For labour-sending countries, nationalisation has redefined rather than reduced demand for migrant workers. Nationals are increasingly visible in supervisory, administrative, and client-facing positions, while migrant workers remain essential for advanced technical functions in ICT, engineering, and healthcare (ESCWA, 2023). Healthcare professionals from the Philippines and India, ICT specialists from Egypt, and engineers from Pakistan continue to play a critical role in GCC labour markets. At the same time, stricter localisation of mid-level administrative and clerical roles has narrowed entry points for foreign workers in these categories (World Bank, 2024). The result is a complementary workforce model in which nationals provide leadership and visibility in strategic sectors, while migrant workers sustain technical depth and innovation. Ensuring that this balance remains effective will depend on continued investment in education, skills development, and regulatory adaptation (OECD, 2024; MPI, 2024).

In summary, the policy environment in the GCC highlights both opportunities and constraints for skilled migration. Long-term residency schemes offer new pathways for highly skilled professionals but remain accessible only to a narrow group of workers, limiting their reach. Nationalisation frameworks have increased citizen participation across a range of sectors, yet they continue to rely on migrant workers to provide technical depth in ICT, engineering and healthcare.

4. UPSKILLING AND RESKILLING INITIATIVES

In the face of unprecedented technological change and shifting labour market demands, upskilling and reskilling have become top priorities for governments and employers across the ADD corridor. These strategies are seen as essential for boosting productivity, supporting economic diversification and enabling workers to adapt to new opportunities, whether within local industries or abroad.

Upskilling refers to acquiring advanced or additional skills that enhance a worker's expertise in their current role, such as a nurse pursuing further training to take on. Reskilling, in contrast, is the process of gaining new competencies that enable an individual to transition into a different occupation or sector. While distinct in scope, both approaches are critical for maintaining workforce adaptability, supporting career mobility and increasing productivity across sectors (Asian Productivity Organization, 2023)

4.1 Key government initiatives

The approaches to upskilling and reskilling in ADD countries are becoming increasingly aligned. Labour-receiving countries in the GCC prioritise economic diversification and digital transformation to develop knowledge-based economies (PwC, 2024; WEF, 2025). Labour-sending countries focus on both domestic employability and international labour mobility. National strategies emphasise foundational and mid-level competencies in technical and vocational education and training (TVET), ranging from basic digital literacy to sectoral training in healthcare, construction, hospitality and manufacturing There is also growing attention on portable skills and international certification frameworks to ensure that workers can compete in global markets (World Bank, 2025; OECD, 2024).

Investing in national talent and Artificial Intelligence in GCC countries

In the GCC, upskilling and reskilling initiatives aim to prepare citizens for the future of work, reduce their reliance on public sector employment and accelerate participation in high-growth private sectors (WEF, 2025; PwC, 2024). A unifying theme across these strategies is artificial intelligence (AI), with all GCC countries having developed an AI strategy or roadmap. The UAE launched its AI Strategy 2031 and appointed the world's first Minister of AI. Saudi Arabia established the Saudi Data and AI Authority (SDAIA) and aims to become one of the world's top 15 AI nations by 2030. Qatar's National Vision 2030 and Oman's AI Programme under Vision 2040 also reflect this ambition (BCG, 2025).

- **United Arab Emirates:** The UAE has become the world's leading sovereign investor in AI, having recently announced a 100 billion AI-focused investment fund (MGX, 2025). Flagship programmes include the 'One Million Arab Coders' initiative, which has enrolled more than 800,000 learners in coding and data science. In addition, universities across the UAE offer over 44 AI-related academic programmes. The Mohamed bin Zayed University of Artificial Intelligence (MBZUAI) has gained global recognition as a leading institution in this field (ESCWA, 2023).
- **Saudi Arabia:** The country is expanding its domestic AI talent base through SDAIA, which has already trained 780,000 citizens. Recent milestones include partnerships with industry leaders to develop Arabic language AI models, as well as youth-focused initiatives such as the National AI Olympiad. Beyond AI, the Ministry of Human Resources has established Sector Skills Councils to coordinate upskilling in 12 priority industries (Vision 2030, 2024; Alexander, 2025).
- **Qatar:** Upskilling efforts in Qatar link digital transformation with employability. The Ouqoul platform uses AI to match Qatari university graduates with private-sector jobs. Another initiative is the Qatar Digital Government Training Programme (QDGTP), which provides over 95 accredited ICT and cybersecurity courses annually in collaboration with international technology leaders (Fragomen, 2025; MCIT Qatar, 2025).
- **Oman:** In 2023, the government launched Khuta, a one-stop career platform offering over 1,500 training programmes for Omani youth and professionals, with tailored services for people with disabilities. The Wa'ed initiative complements these efforts by cultivating entrepreneurship through innovation training and incubation support for young founders (WEF, 2025).
- **Bahrain:** The Tamkeen Labour Fund is Bahrain's primary instrument for developing its workforce. In 2023, it supported 15,000 ICT certifications in 2023 and it aims to train 50,000 Bahrainis in AI skills by 2030. Other upskilling programmes include the EduNET Portal, which provides citizens with free access to digital and STEM learning resources and Youth City 2030, an annual skills camp that combines entrepreneurship with job readiness training (Tamkeen, 2023; ESCWA, 2023).
- **Kuwait:** Kuwait is finalising its AI strategy and expanding partnerships with global technology firms. Recent collaborations with Google Cloud aim to provide training in digital and technical skills that are aligned with the country's economic diversification goals (Google, 2025).

Building skills for domestic growth and international mobility in labour-sending countries

In labour-sending countries, skills development serves two purposes: preparing workers for overseas employment and strengthening domestic industries. To achieve this, governments are expanding structured TVET systems, enhancing digital skills and aligning programmes with international certification frameworks (PwC, 2022; World Bank, 2025).

International certification mechanisms are essential for facilitating cross-border labour mobility. India and Pakistan, for example, have developed some of the most robust pipelines into GCC markets. India's Skill India International Centres, including the Varanasi hub established in partnership with DP World, provide sector-specific training tailored to the labour demands of GCC countries (WEF, 2025; Government of India, 2025). Similarly, Pakistan's National Vocational and Technical Training Commission (NAVTTC) collaborates with Saudi Arabia's Skills Verification Programme (SVP) to certify up to 100,000 workers annually, thereby improving the portability of skills credentials (NAVTTC, 2024).

In addition to certification, an increasing number of labour-sending countries are expanding training in emerging sectors. In 2025, India's Skills Accelerator introduced new pathways in AI, robotics and green energy. These modules are all aligned with global labour market standards. Thailand's 'Thailand 4.0' initiative also focuses on robotics and smart manufacturing. In partnership with Microsoft, the THAI Academy aims to train 100,000 workers in AI and develop a talent pool of 280,000 high-tech professionals specialising in semiconductors, electric vehicles and other future-oriented industries (Microsoft, 2025).

Some government initiatives focus on inclusive skills development. Indonesia's Kartu Prakerja, for example, links training subsidies to e-wallets to empower traditionally marginalised groups, including people disabilities, to participate in upskilling initiatives (PwC, 2022). Similarly, the Technical Education and Skills Development Authority (TESDA) in the Philippines offers targeted programmes and scholarships to senior citizens, women and people with disabilities. TESDA establishes training centres and mobile training units in remote areas by partnering with non-governmental organisations (NGOs) and industry groups (TESDA, 2024).

These training efforts are reinforced by targeted policy incentives. In Thailand, for example, the government encourages employer participation through a 250% tax deduction on approved training expenses for employees. employee training expenses. Businesses can therefore deduct up to three times their costs for sending staff to digital skills courses certified by the Digital Economy Promotion Agency (DEPA). They can also claim an additional 150% deduction on the first year's salary of new digital talent (OpenGov, 2024).

The potential impact of upskilling and reskilling on labour productivity

Upskilling and reskilling are among the most powerful levers for boosting productivity and growth across the ADD corridor. In the GCC, effective skills transformation and improved alignment between education and labour market demand could increase non-oil GDP by an estimated 3 to 5% over the next decade (PwC, 2024; WEF, 2025). The largest gains are expected in digital and advanced industries, where productivity growth is closely tied to specialised human capital. Saudi Arabia's Vision 2030, for example, aims to increase the non-oil share of its GDP from 16% to over 50% (Vision 2030, 2024).

The economic stakes are equally high for labour-sending countries in South and Southeast Asia. Comprehensive upskilling could boost regional GDP by up to 4% (or US$250 billion) by 2030, driven by higher labour force participation, job creation and productivity gains (PwC, 2022). Economic modelling further shows that upgrading industries (e.g., moving workers into higher-value sectors such as IT services and advanced manufacturing) could yield an additional 1.5–2% in GDP growth (PwC, 2024).

Limitations of upskilling and reskilling programmes

While upskilling and reskilling remain key components of workforce development strategies across the ADD corridor, the impact of such initiatives is rarely immediate. Almost a third of new skilled employees in the region require up to six months of reskilling before they can work at full capacity, which highlights the time lag between completing the programme and achieving measurable results in the workplace (ADB, 2024). This time-toproductivity gap is particularly evident in advanced technical and digital sectors, where constant technological changes further extend adjustment periods.

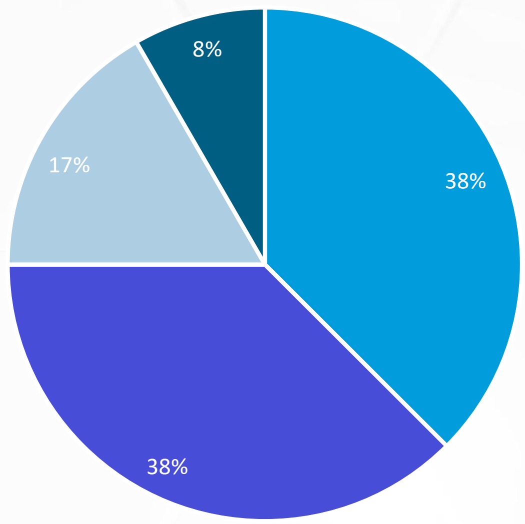
Participation and completion rates present another critical obstacle. In Bangladesh and Pakistan, for example, just 55% of vocational students finish their programmes, while fewer than a quarter of India's 1.5 million engineering graduates are deemed ready for roles in key areas such as AI and renewable energy (OECD, 2023; ILO, 2024). In addition, women and those living in rural areas have participation rates that are 40–50% lower than those of their urban male counterparts. This exacerbates skills shortages and perpetuates labour market exclusion (ESCWA, 2023).

Another limitation is the substantial financial and organisational investment required for effective upskilling on a large scale. High-quality programmes require sustained financing from the government and private sectors, investment in digital and physical infrastructure and continuous curriculum development to keep pace with evolving industry demands (PwC, 2024; ADB, 2024). However, resource constraints, limited access to expert trainers and the cost of new technology platforms can hinder the reach and quality of reskilling initiatives, particularly for SMEs and in rural areas (PwC, 2024; EY, 2023).

4.3 Private sector initiatives

The private sector plays a critical role in developing workforce skills, which complements government-led initiatives. Many companies use structured assessments to map existing capabilities and identify emerging skill gaps. Survey findings show that the broad majority of companies have either integrated formal upskilling strategies into their workforce planning, or they provide such opportunities on an ad hoc basis (see Figure 8).

Figure 8: Employer Approaches to Upskilling



Source: Fragomen Survey on Assessing Workforce Skills and Upskilling Strategies in Private Sector Companies, 2025.

In addition, companies are investing heavily in initiatives aimed at creating resilient workforces that are ready for the future. In the GCC, digital transformation is driving private sector training. In 2024, Alibaba Cloud launched its MEA Academy Training Centre in the UAE to strengthen digital competence among clients and partners in the region. The programme aims to train 5,000 professionals in the next five years through online labs and certification courses. This expansion highlights how multinational technology firms are establishing physical and virtual training ecosystems within the GCC (Alibaba Cloud, 2024).

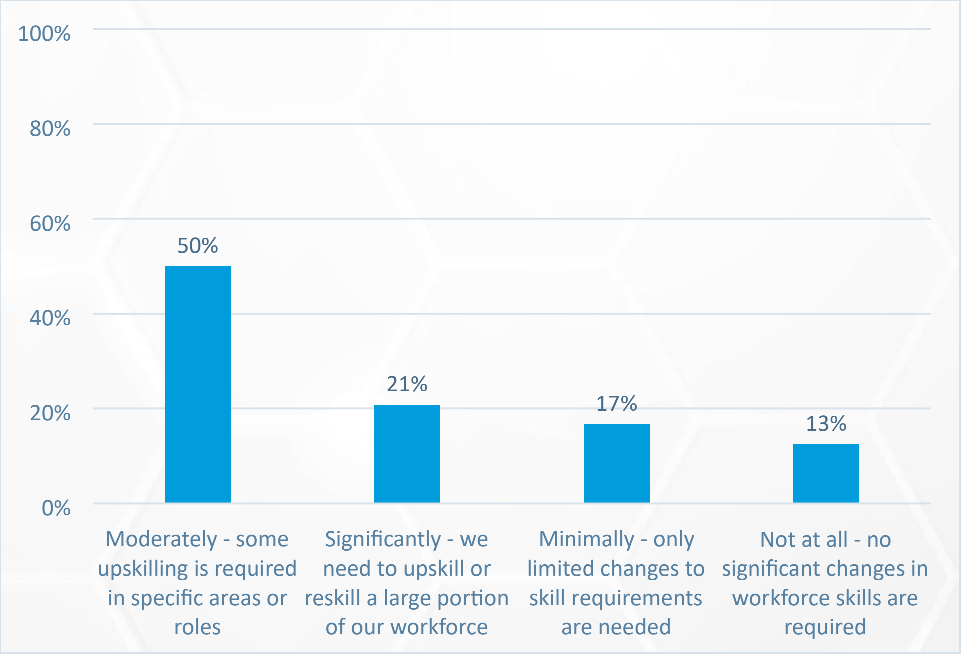
Such initiatives are being complemented by partnerships between governments, multinational firms and specialised training providers, which are expanding the scale and scope of national upskilling efforts. In Bahrain, for example, the national labour fund Tamkeen has been working with General Assembly, a global technology training provider owned by the Adecco Group, since 2021 to deliver a technology-focused training academy covering programme design, delivery, career coaching and job placement. To date, over 2,000 Bahraini nationals have received reskilling and been placed in technical roles, such as software engineering, data science and data analytics. These workforce development efforts are reinforced by parallel investment from the private sector, with several multinational firms, including major financial and professional services companies, committing over USD 1 billion to establish local technology hubs expected to create more than 1,500 jobs over the next three years.

Employer-led upskilling models are also evident elsewhere in the GCC. In the United Arab Emirates, for example, Talabat has partnered with General Assembly to deliver an artificial intelligence academy aimed at upskilling employees in technical and non-technical business functions such as human resources, finance, legal services, sales, and marketing. In Saudi Arabia, General Assembly has collaborated with the Saudi Digital Academy since 2018 to provide unemployed nationals with skills for software engineering roles.

Similar dynamics can be seen in labour-sending countries where innovation hubs are growing. For example, Walmart's Global Capability Centre in Bengaluru has introduced an AI Academy Portal and other internal learning platforms to upskill developers, product managers and technology specialists.

The programme involves partnerships with leading Indian universities and experiential activities such as hackathons, job shadowing, internal fellowships and open-role rotations. By 2025, these platforms had reached over 30,000 employees, further reinforcing India's position as a global hub for advanced digital talent (Economic Times, 2025). Looking ahead, the rapid adoption of AI and digital technologies is expected to increase demand for tailored training solutions. Half of the companies surveyed in the ADD corridor anticipate moderate upskilling of their workforce as AI reshapes job roles (Figure 9).

Figure 9: Impact of Emerging Technologies on Workforce Skills



Source: Fragomen Survey on Assessing Workforce Skills and Upskilling Strategies in Private Sector Companies, 2025.

5. CONCLUSION AND POLICY RECOMMENDATIONS

The ADD corridor has emerged as one of the world's most dynamic migration systems, linking Gulf diversification strategies with several well-established skills pipelines. Yet despite significant reforms in both sending and receiving countries, challenges remain. These include mismatches in advanced skills, uneven expertise or credential recognition systems and gaps in the inclusion of small and medium-sized enterprises as well as women in the labour market. Building on the progress documented in this report, the next phase of policy cooperation must prioritize adaptability, inclusivity and stronger public-private partnerships to ensure resilience and competitiveness in the face of Industry 5.0 transformation.

Consolidate and Expand Mechanisms for Credential Recognition and Portability

For Talent Receiving Countries:

- Consolidate and expand skills verification and recognition systems (such as the Skills Verification Program, the Qualification Verification Program and Labour Market Information System) to significantly reduce credential validation timelines.
- Partner government-led credential verification mechanisms with independent organizations that provide primary source verification or credential evaluation services for both academic and vocational qualifications.
- Incorporate pre-departure verification mechanisms in partnership with TVET agencies and credentialing bodies in origin countries to reduce skills mismatches and costs.

For Talent Sending Countries:

- Align curricula with Gulf taxonomies (such as Saudi Arabia's Sector Skills Councils and Qatar's Labour Market Information System) and negotiate mutual recognition agreements to shorten credentialing delays.
- Ensure pre-departure orientation covers not only cultural and contractual awareness but also sectorspecific training, language preparation and digital readiness to improve worker adaptability on arrival.
- Establish national credentialing bodies and digital credentials repositories that can interface directly with Gulf verification systems or authorized third-party intermediaries.

Harmonize Skills Classification Frameworks

For All Member Countries:

- Work towards harmonised classification frameworks across the corridor, drawing on international standards such as the ILO's International Standard Classification of Occupations (ISCO) and building on national initiatives, to reduce recognition gaps and improve portability of qualifications.
- Establish an ADD-wide skills governance mechanism to harmonise occupational standards, coordinate sectoral upskilling funds and map training programmes to corridor-wide categories.

Introduce Inclusive Immigration Pathways that Facilitate Skills Diversity

For Talent Receiving Countries:

- Expand beyond residency schemes catered to high-impact or high-visibility roles or skill sets and include strategically important or technically nuanced roles that may not be very senior in nature but are important to address local skills gaps.
- Introduce temporary and intra-company transfer visas in a timely manner, as seen in international practice, to enable rapid deployment of skilled staff and to facilitate knowledge transfer.
- Review immigration frameworks to consider pathways for qualified dependents to contribute to the labour market, thereby maximizing the value addition of skills already present within GCC countries.
- Consider developing dynamic, data-driven shortage lists to address acute labour needs – by associating speed-to-ground provisions (fast-track/premium processing, through expressions of interest, reduced documentary requirements etc.) Encourage involvement of employers (e.g. through regular and systematic consultation periods or the implementation of trusted employer schemes).

For Talent Sending Countries:

- Design inclusive outbound mobility programs that actively support participation from underrepresented groups, including women, youth from rural areas and persons with disabilities.
- Expand pre-departure support systems to offer tailored guidance, legal literacy and sector specific preparation for diverse migrant cohorts.

Encourage Public-Private Partnerships Skills Development

For Talent Receiving Countries:

- Enable structured private sector participation in identifying and addressing skills gaps through forums, research collaborations and trusted partner schemes.
- Provide incentives and access mechanisms for small and medium-sized enterprises (such as training subsidies or skills credits), ensuring they can participate equitably in upskilling initiatives.
- Integrate skills planning for green transition sectors – clean energy, water management and climate adaptation – into both diversification agendas and training systems.
- Foster the creation of collaborative upskilling initiatives that are underpinned by public sector infrastructure and guided by the needs of business and future industry direction.

For Talent Sending Countries:

- Expand specialised training centres and sector-focused academies in priority fields such as healthcare, renewable energy and digital technologies, in partnership with employers and international organizations.
- Consider employer-led curriculum development in vocational institutes to ensure alignment with realtime labour market needs.
- Leverage diaspora networks and returning professionals to co-develop training programs and mentorship schemes.

Establish Private Sector Discussion Forums on Nationalisation Policies and Workplace Inclusivity

For Talent Receiving Countries:

- Design agile and holistic nationalisation policies that balance the placement and advancement of citizens into leadership roles and strategic positions with an open, inclusive and business-friendly framework for skilled expatriate workers and avenues for businesses to voice feedback or seek recourse in the event of skills unavailability in the local market.
- Increase transparency in nationality diversification rules, giving employers clarity to plan recruitment while still supporting governments' demographic objectives.
- Move beyond headline targets to implement sector-specific women's tracks in AI, renewables and health-tech.
- Support licensing and credential reforms that reduce barriers to female participation in non-traditional sectors.
- Embed women's participation, small and medium-sized enterprises access and rural outreach as corridor-wide goals endorsed at the ministerial level.

For Talent Sending Countries:

- Establish national forums that engage employers, training institutions and returning migrants to gather feedback on workplace inclusion challenges abroad.
- Promote gender-inclusive training programs and ensure women are represented in outbound labour mobility schemes.

Harness Return Migration and Take Measures to Prevent Brain Drain

For Talent Receiving Countries:

- Create pathways for career advancement and upskilling to retain settled skilled and reduce outbound movement, especially in sectors facing persistent shortages.
- Focus on cooperative education models that combine structured workplace learning with academic instruction, enabling businesses to invest in future talent and strengthen retention across the corridor.

For Talent Sending Countries:

- Establish digital talent platforms to maintain connections with nationals working abroad, offering mentorship and targeted re-entry programmes to maximise ongoing contributions.
- Expand recognition of prior learning schemes to reintegrate returnees and enable redeployment abroad, generating a circular skills dividend that strengthens both domestic and corridor-wide ecosystems.
- Offer reintegration incentives to attract returning professionals and channel their expertise into national development.

Establish Regional and Corridor-Wide Collaboration

- Launch an interactive corridor-wide data tool integrating national Labour Market Information Systems with ESCWA's Skills Monitor, updated quarterly to track demand in AI, healthcare and renewables.
- Scale up successful bilateral models (such as the India–Saudi Skills Verification Program, Qatar–ESCWA Labour Market Information System) into corridor-wide platforms.
- Pilot cross-border trusted employer schemes to accelerate recruitment of high-skilled talent across multiple GCC countries.
- To ensure reforms deliver measurable productivity gains, the ADD should adopt a Skills Dashboard with common indicators that reflect sector-specific value addition and skills efficacy metrics.

The ADD corridor has undergone rapid transformation but remains fragmented. The next phase must focus on portability, inclusivity and adaptability, ensuring that skills mobility drives productivity, resilience and equitable growth across all member countries.

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7. ANNEX

Survey Methodology

To gather insights on company practices related understanding the role of skills and diversity for labour productivity across the ADD corridor, an online survey was disseminated to private sector companies and employer federations. The survey targeted a diverse range of respondents, including small and medium-sized enterprises (SMEs), multinational corporations and local businesses. Respondents represented sectors such as oil and gas, information technology, professional services, finance and health care.

A total of 24 responses were received, comprising 8 employer federations or chambers of commerce and 16 private sector companies. The findings presented in this paper reflect the practices of the surveyed organizations and should be interpreted as a snapshot, rather than as representative of the broader private sector across the ADD corridor.

Survey Questions

1. **Please provide the name of your company and the country in which it operates.**

____

2. **How well does your current in-country talent pool meet your company's workforce needs?**

- Fully meets our needs - we rarely need to look beyond local talent
- Partially meets our needs - we hire some foreign talent to fill gaps
- Largely insufficient - we frequently need to recruit foreign talent for key roles
- Highly insufficient - we depend primarily on foreign talent across most roles

3. **If your company recruits internationally, which roles are most commonly filled this way?** *(Select all that apply)*

- Senior leadership (e.g. C-suite, executives)
- Managerial roles
- Technical or specialist positions
- Other, please specify: ____________________

4. **What strategies has your company found effective in attracting and retaining in-country talent?** *(Select all that apply)*

- Competitive compensation packages
- Career progression opportunities
- Support in obtaining long-term or permanent residency
- Government-backed benefits, such as financial subsidies
- Flexible and remote work options
- Learning and development opportunities
- Other, please specify: ____________________________________

5. **What are the main limitations your company faces in the in-country talent pool?**

(Select all that apply)

- Insufficient technical skills
- Limited soft skills (communication, problem-solving, teamwork)
- Lack of relevant work experience
- Mismatch between education and job requirements
- Candidates' expectations towards social protections and other benefits
- Low motivation/work readiness
- Other, please specify __________

6. **How does your company currently address skills gaps in its workforce?** *(Select all that apply)*

- In-house training programmes
- Sponsoring for external training (e.g., certifications)
- Structured on-the-job learning (e.g., mentoring, coaching, job shadowing)
- Hiring external specialists to temporarily fills gaps
- Recruiting new talent with required skills
- International assignments
- Intra-company transfers
- Government-led initiatives and platforms
- No formal approach in place
- Other (please specify) __________

7. **How has the adoption of emerging technologies (e.g., AI, automation) affected the skill requirements of your company's workforce?**

- Significantly - we need to upskill or reskill a large portion of our workforce
- Moderately - some upskilling is required in specific areas or roles
- Minimally - only limited changes to skill requirements are needed
- Not at all - no significant changes in workforce skills are required

8. How does your company prioritize upskilling and reskilling within its workforce strategy?

(Select the option that best describes your company's approach)

- We have a formal upskilling/reskilling strategy integrated into workforce planning
- We offer upskilling/reskilling opportunities on an ad-hoc basis
- Upskilling is mainly driven by employee initiative rather than company programs
- We currently do not have a focus on upskilling or reskilling
- Other, please specify: ___________________________

9. Do current immigration and labour frameworks in the country your company operates support your ability to upskills local and foreign talent?

- Yes, they are supportive and flexible
- Somewhat, there are opportunities, but also limitations
- No, current frameworks hinder upskilling efforts
- Other, please specify: _______________________________

10. What incentives or support would encourage your company to invest more in upskilling employees? *(Select all that apply)*

- Government subsidies
- Access to specialized training providers
- Tax incentives for training expenses
- Partnerships with universities or vocational institutions
- Other, please specify: ____