

Policy Report

Special Issue

*Highly Skilled Migration to the Gulf States:
How Do GCC Countries Fare in the Global
Competition for Talent?*

No.4

Highly Skilled Migration from Tunisia to Saudi Arabia, the UAE and Qatar

Trends, Drivers and Policies

Ali Belhaj

Executive Summary

The migration of highly skilled Tunisians to the Gulf Cooperation Council (GCC) countries began in the 1970s through formal and structured channels. Over the years, this migration has evolved significantly, with an increase in the number of migrants and a particular increase in female participation. While the main driver of this migration is employment, aspirations are becoming more diverse, especially among those who choose Qatar as a destination. Historically concentrated in sectors such as education and health, and mostly in Saudi Arabia, the demand for skilled Tunisian workers now extends to tertiary sectors such as information technology and business management, particularly in the United Arab Emirates. Despite the continued appeal of the Gulf countries as a destination for skilled labour, the region is still faced with competition from Western Europe and North America, which increasingly attract Tunisian migrant workers. Public perception of this migration is mixed; while it is seen positively because of the remittances that support the Tunisian economy, it raises concerns about the brain drain which could lead to domestic instability. This paradox is compounded by the fact that Tunisian policymakers have difficulty effectively addressing these challenges. This is highlighted by the lack of coherent responses, which hampers public and private investment management efforts and fosters skepticism about migration. To navigate this dynamic, Tunisia must develop a strategic response that aligns policy development within national and international contexts, in the areas of employment, education, health, and training. Strengthening international cooperation with the GCC countries is essential for Tunisia to ensure employment opportunities while protecting the rights and integration of Tunisian workers. In

addition, the promotion of both tangible and intangible contributions of skilled migrants through investment opportunities and better dissemination of information can strengthen links with this population. Finally, the promotion of multi-stakeholder dialogue will create appropriate responses to reduce public tensions and steer discourse toward constructive engagement. This multidimensional approach is crucial to maximising the benefits of skilled migration while addressing the challenges so that Tunisia can effectively position itself in an increasingly competitive global labour market.

Introduction

Migration between Tunisia and the Gulf states (Saudi Arabia, Qatar and the UAE) is a complex phenomenon, driven by dynamics spanning beyond the mere issue of labour supply and demand, and touching upon geopolitics, competition for skills between destination countries and the challenges of managing migration. The policy brief analyses the many dimensions characterising the migration corridor, with a focus on the following four key questions: what are the current trends characterising highly skilled migration from Tunisia to the three Gulf states? What are the drivers of these movements? What are their outcomes? How is highly skilled emigration perceived in Tunisia, and what are the policies addressing the issue?

Tunisian migration: Characteristics and trends

Migration from Tunisia has been sustained since the 1970s and the 1,731,619 Tunisian citizens recorded abroad in 2021 represented approximately 14 percent of the total Tunisian population. This observation is consistent with the results of the Tunisia HIMS survey, which recorded 566,000 Tunisian migrants residing abroad,² more than half of whom had emigrated since 2010 (283,000 individuals). Statistical and administrative sources point to the increase in the presence of women among Tunisian migrants. Between the years 2000 and 2020, sources converge to highlight a 2 percent increase in the share of women among Tunisian migrants abroad.

A comparison between the figures of Tunisia's National Institute for Statistics (INS) censuses of 2004 and 2014 shows that, despite a decrease in outflows (from 76,474 to 65,927), the proportion of those who emigrated for professional reasons remained relatively high (71.1 percent in 2004 and 73.4 percent in 2014). The Tunisia HIMS survey completed in 2021 also identified "searching employment" as the main reason for migrating abroad (46 percent of interviewees who departed in 2015-2020), together with other, less dominant motivations (studying abroad, reuniting with family, improvement of quality of life, for instance).

Over the past decades, the educational profile of Tunisian migrants changed significantly. Approximately half of migrants who left Tunisia during the period 2010-2014 held at least an undergraduate university degree, whereas university graduates only made up 10.7 percent of those who emigrated before 1970. Emigrants with a primary education level made up a third of these migrants, as compared to 6.8 percent of those having left during the past decade.

This pre-eminence of Europe as a favorite destination is confirmed by figures from the Ministry of Foreign Affairs, Migration and Tunisians Abroad (MAEMTE), which estimate the share of Tunisian migrants in the region at 85.75 percent of the total migrant population in 2021. However, this concentration decreased slightly between 2015 and 2021, revealing the emergence of other destination areas. The proportion of Tunisians in the Gulf region increased from 8.61 percent in 2015 to 10.03

percent in 2021. MAEMTE data indicate that the number of Tunisians in Saudi Arabia increased from 21,086 to 29,009 during the period 2015-2021, but decreased from 26,364 to 22,209 in the UAE, while the number of Tunisian residents in Qatar expanded considerably, from 17,750 to 34,156.

The migration of Tunisian highly qualified professionals to Gulf countries: Profile of migrants, recent trends, migration drivers

Figures for the three Gulf countries underscore the feminisation of the migration of highly qualified Tunisian workers. Women make up almost a half of all Tunisian migrants in Gulf states, and among the 54.60 percent university graduates among them. 51 percent of highly skilled Tunisian migrants in the UAE and 43 percent in Qatar are females, and 39.2 percent in Saudi Arabia.

Nearly 54 percent of Tunisian graduates chose to use a structured network of brokering actors to find employment in the Gulf region, most often public placement agencies such as the Tunisian Agency for Technical Cooperation (ATCT). By contrast, those who chose Europe as a destination tend to favour more informal avenues or personal networks for seeking employment abroad. This echoes the history of Tunisian workers' migration to the Gulf region: since its beginnings in the early 1970s, highly skilled migration has been carried out through formal channels: public institutions and agencies.

In Saudi Arabia (2011-2015), ATCT statistics indicate that most positions on offer were for the sector of education. The sector absorbed 80 percent of the recruitments from Tunisia, mainly university lecturers, as well as secondary school and physical education teachers. In Qatar, paramedical personnel were in high demand, although the education sector was also prevalent. Between 2019 and 2023 however, trends changed, and interest grew in other fields.

The demand for Tunisian university teachers went down between 2020 and 2023 in Saudi Arabia, falling to 15 percent of all recruitments. However, the demand for paramedical personnel increased notably (from five to 20 percent of recruitments), like for engineers (nine to 13 percent), for sport teachers and trainers (ten to 18 percent) and medical doctors (six to 11 percent of all recruitment over the period).

In the UAE, specialists in trade and management were the most sought-after (43 percent of all offers), followed by other educational sector positions (physical education during the past decade, and more recently, secondary education from 2020 to 2023). In Qatar, demand remained stable over time, with a consistent preference for paramedical staff (32-34 percent of recruitments of Tunisian professionals in the country over the years 2011-2023), followed by managers (ten percent), university teachers (two percent), medical doctors and hotel managers (two and one percent, respectively).

The analysis of ATCT's annual placement rates of highly skilled Tunisian workers reveals a marked decline in the share of workers choosing opportunities in the Arab Gulf countries, where placements fell from 83.7 percent in 2015 to 39 percent in 2022. This rate is now similar to that of European countries, which have seen a significant increase in demand for Tunisian skills since 2018. In 2022, only 7.02 percent of candidates were placed in the Gulf countries. Although placement rates in North America and Asia have been on a steady path, they were impacted by the COVID-19 pandemic in 2020. The ATCT annual reports also underline the international competition for professionals in specific fields: German, French and Canadian recruiters also approached Tunisian placement institutions in search for health, higher education and ICT specialists.

Job search: a constant motivation for migrants, yet fading over the years

Search for employment constitutes a key motivation for those considering a migration experience. Professional motivations are observable among all groups of highly qualified migrants, particularly for those who have chosen the Arab Gulf countries as their destination: 53.7 percent of the Tunisian migrant population in the region, compared to 38.3 percent of those in North America and 26.0 percent of those in Europe. Professional drivers stand particularly high among skilled Tunisians residing in Qatar (67.2 percent). Employment remains the main motivation, although less intensively for those residing in Saudi Arabia (45.8 percent) and in the United Arab Emirates (43.1 percent).

However, the results of the Tunisia-HIMS survey on Tunisian graduates' intentions to migrate unveil other motivations to emigrate. While job search still prevails (20-22 percent of motivations), reflecting the limited prospects offered by the Tunisian labour market, social reasons, such as the search for stability and certain freedoms, reach up to 25 percent for some destinations.

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

Perceptions regarding highly skilled migration

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

77 percent of the highly skilled migrants residing in Saudi Arabia, Qatar, United Arab Emirates expressed their intention to stay in the region. Among these, 59 percent cited a good job and a decent income as their main motivations. However, many Tunisian migrants suffered discriminatory situations: being treated with less respect because of being a migrant (experienced by 11 percent of surveyed highly qualified Tunisian migrants in the Gulf, as opposed to 4.9 percent in Europe), hostile or superior behavior towards migrants (12.3 percent of migrants in the Gulf, as compared to 6.2 percent of migrants in Europe).

Financial remittances: the main positive outcome of highly skilled Tunisian emigration

Prior to the COVID-19 pandemic, approximately 40.2 percent of migrants living in the Gulf reported sending remittances to family or others, a relatively high percentage compared to migrants in North America, where only 16.9 percent reported sending remittances, according to the Tunisia HIMS survey.

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

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

Limited policy responses

For over sixty years, emigration has served as a political lever for Tunisian governments in their fight against unemployment, given the economy's inability to integrate all young graduates and women into the domestic work force. However, Tunisia still does not have an explicit migration strategy, a paradox given the many institutional, legal, and international cooperation initiatives put in place. Although three versions of national migration strategies were proposed in 2012, 2015, and 2018, none have been validated by the government. More recently, a draft national international placement strategy (2022) also remains unimplemented. This lack of clarity in migration policy suggests a lack of strategic vision, particularly with regard to the emigration of highly qualified people to destinations such as the Gulf countries. Various reports and meetings on the issue of highly skilled migration, such as that organised by the Ministry of Foreign Affairs in 2024, did not produce concrete outcomes, which reflects the lack of coordination between stakeholders.

Public debates on the issue are dominated by negative representations of the highly skilled emigration, which scapegoat external actors without coming up with constructive propositions. Skills' emigration is perceived as an opportunity and as a threat, and the absence of consensus makes it impossible to devise a coherent policy response to the phenomenon.

ATCT data on the rate of vacancies from the three Gulf countries filled by Tunisian workers highlights ATCT's difficulties to supply enough Tunisian candidates to take on job offers from Qatari, Emirati and Saudi partners. In 2015, the rate of job demands' satisfaction reached 85.3 percent, but went down to 21,9 percent in 2022, and increased slightly to 37,83 percent in 2023. This highlights the Agency's inability to meet the needs of job applicants and foreign employers.

Conclusions and recommendations:

The migration of highly skilled Tunisians, especially to the Gulf region, is not a new phenomenon and has been a pillar of the development cooperation between Tunisia and its partners in the Arab region. Over time, Tunisian migration to the Gulf expanded and women are making up an increasing share of the migrants.

The reasons underlying Tunisian migration are mainly of a professional nature, although its drivers have been influenced by the socio-economic and political changes affecting countries of origin and destination. The emigration of skilled Tunisians to the Gulf countries remains concentrated in traditional sectors such as education and health, particularly in Saudi Arabia. However, other tertiary sectors, such as information technology and business management are also experiencing growing demand, especially in the UAE. Perceptions regarding highly skilled migration from Tunisia are mixed: on the one hand, it is perceived as beneficial (i.e., remittances for the economy), but on the other hand, it raises concerns related to brain-drain, a major topic of public debate. Policymakers display little ability to respond to the concerns raised and to consider the increasing pressure to migrate felt by highly skilled citizens. This political hesitation impacts the functioning of public and private institutions in charge of migrants' placement, and more so, as Tunisian professionals are increasingly on demand in Gulf states, in Western Europe and in North America.

Against this backdrop, the following recommendations are put forth:

- Need for a strategic response from Tunisian policymakers to develop informed policies in line with the national and international context, in the areas of employment, training, education, health, etc., considering the multidimensionality of labour migration.
- Strengthening international cooperation with the Gulf countries is a crucial issue to secure employment opportunities and guarantee the rights of Tunisian workers, thus facilitating their integration into Gulf societies.
- Incentives to material and immaterial transfers generated by migrant skills, especially investment; improvement of information on existing mechanisms. Promoting avenues for strengthening ties between Tunisia and highly skilled emigrants is also of prime importance.
- Promote a multi-stakeholder dialogue in order to provide appropriate responses to the phenomenon. Find ways to alleviate tensions and negative perceptions of highly skilled emigration observed in the public sphere; encourage relevant stakeholders to engage concretely in addressing the phenomenon, its causes and consequences.

Contact

Philipp Dienstbier
Director
Regional Programme Gulf States
European and International Cooperation
philipp.dienstbier@kas.de

Imprint

Published by Konrad-Adenauer-Stiftung, 2025,
Berlin, Federal Republic of Germany

This publication was published with financial support of
the Federal Republic of Germany.

This policy report is part of a collaborative project with the Gulf Labour Markets, Migration and Population (GLMM) Programme of the Gulf Research Centre. It has been extracted from a chapter in our comprehensive publication, "Highly Skilled Migration to the Gulf States: How do GCC Countries Fare in the Global Competition for Talent." This report is one of several policy reports derived from individual chapters from the publication, each authored by different experts. All related policy reports are available separately on the Konrad-Adenauer-Stiftung (KAS) website [here](#).

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