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Middle East Workforce

Hopes and Fears Survey ²⁰²⁴

A dynamic Middle
Eastern workforce
champions change



Middle East Workforce Hopes and Fears Survey 2024

A dynamic Middle Eastern workforce champions change

Introduction

In the Middle East, where evolving policies, governance and technological advancements are continually reshaping the economic landscape, change has become the only constant. PwC's latest **Middle East Workforce Hopes and Fears Survey** reveals a future-oriented workforce that is deeply engaged, forward-thinking and optimistic. Employees in the region are fully embracing the transformations around them, showing greater alignment with their organisations' long-term goals than their global counterparts. They also have stronger confidence in their leadership's ability to drive change and deliver on commitments.

This year, our survey of 1,500 public and private sector employees across the Middle East revealed sentiments significantly more positive than the global average. Employees in the region demonstrate a stronger appetite for personal and professional growth, with a pronounced emphasis on acquiring new skills. They keenly anticipate the future of jobs, aware that their roles are evolving rapidly due to factors such as technological advancements and the climate crisis. Opportunities for learning and development play a crucial role in their career decisions, highlighting a culture that values continuous improvement and adaptability.



The Middle East also leads in adopting remote work practices, highlighting a progressive approach to flexible work arrangements. Furthermore, there is a widespread and enthusiastic embrace of AI tools among regional employees, surpassing the global average. The region's workforce is more readily adopting GenAI, convinced of its potential to enhance work efficiency and productivity.

Given the speed, scale and scope of change in the region, leaders recognise the need to reinvent their business models and adapt their leadership approaches. As part of this transformation, they are now engaging with a more evolved workforce — one that is markedly more dynamic and positive than a year ago. This workforce is well-positioned to drive organisational success and navigate the future with confidence.

This report delves deeper into key employee sentiments across the Middle East and suggests critical actions for leaders to create opportunities for employee upskilling and growth, while embracing emerging technologies and new ways of working. Organisational heads must nurture their most important asset – their employees – as transformation plans in the region are likely to succeed only with their crucial support.



01 An engaged workforce, aligned with long-term business goals and optimistic about the future

In the Middle East, employees are not only aligned with their organisations' long-term strategic objectives but are also driving them forward with remarkable clarity and purpose. A staggering 85% of survey respondents reported a clear understanding of their organisations' goals, surpassing the global average of 77%. Even more impressive is that 88% said that their daily work supports these long-term objectives, indicating a high level of engagement and purpose.

This alignment reflects the effective communication of vision and strategy within these organisations, bolstered by clear and transparent communications from senior leaders, as reported by 82% of respondents. Moreover there is a high level of trust in leadership, with 80% of employees expressing confidence in their leaders' ability to fulfil commitments and promises, outpacing the global average of 68%. Additionally, 81% believe that their senior leaders possess the necessary skills and expertise to drive change, highlighting a robust leadership foundation.

Employees in the region feel valued and empowered, with 79% of respondents believing that top leaders would genuinely listen to and value their views. This supportive atmosphere contributes to a positive employee experience, further reinforced by over three quarters (77%) of employees stating that their organisation's senior leaders treat them fairly.

85%

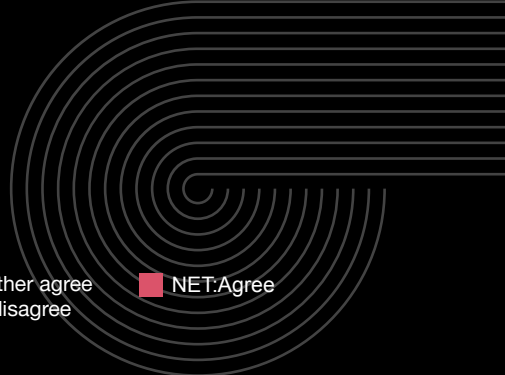
reported a clear understanding of their organisations' goals

88%

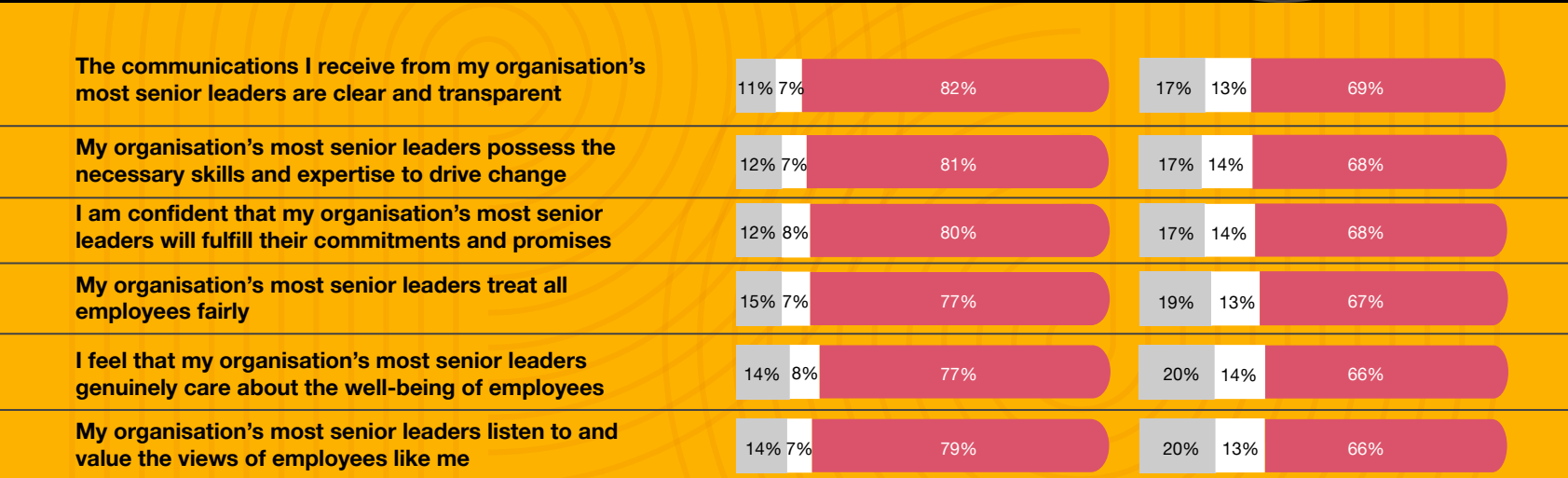
said that their daily work supports organisations' long-term objectives



To what extent do you agree or disagree with each of the following statements about your organisation's most senior leaders?



NET:Disagree
 Neither agree or disagree
 NET:Agree



Middle East

Global

The positive sentiment towards leadership in the Middle East is largely driven by a mature, enabling ecosystem. Governments in the region demonstrate clarity in their agendas and purpose, staying ahead of the curve by implementing new policies and initiatives as part of their broader economic diversification strategies. This proactive approach creates opportunities and fosters an environment where employees feel supported and optimistic about their future.

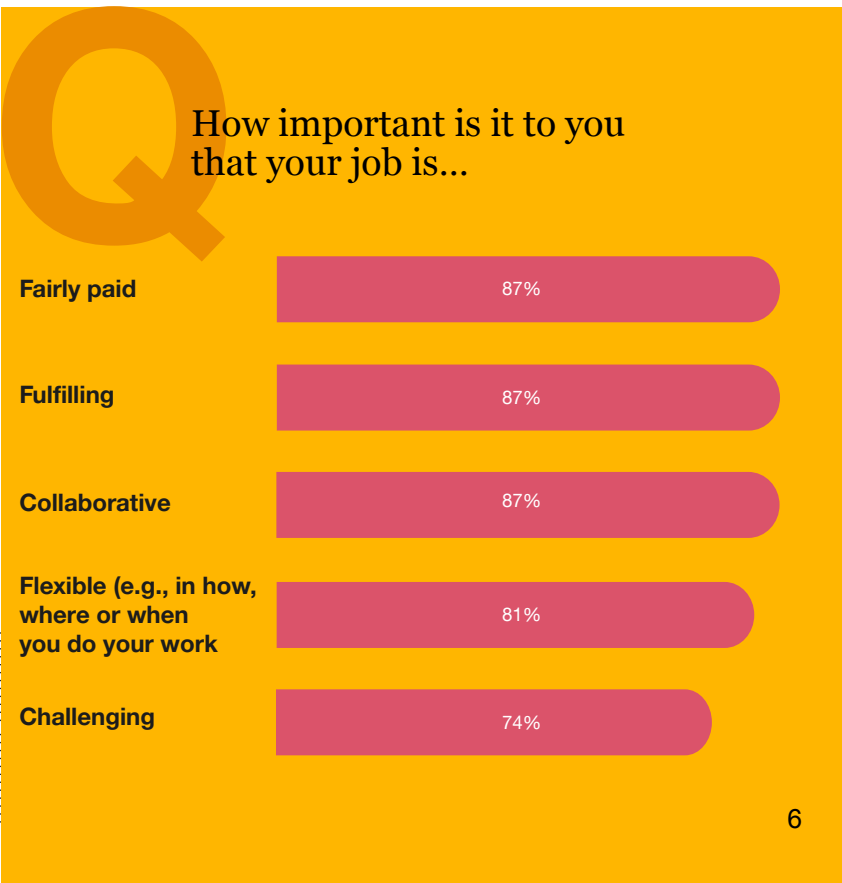




So, in a region where the scale of transformation is so profound, what fuels employee satisfaction?

In a region that is rapidly transforming, understanding the drivers of employee satisfaction is essential. Our survey reveals that employees in the Middle East prioritise fair pay and meaningful work, with an overwhelming 87% considering these aspects as extremely important.

Specialised training emerges as a key factor in job satisfaction. 90% of respondents with specialised training feel fairly compensated and 80% find their job fulfilling. In contrast, only 49% of those without such training feel fairly compensated, and a mere 43% find their jobs fulfilling. These figures highlight how specialised skills not only meet job demands better, but also enhance employees' perception of their contributions, leading to greater job satisfaction.

Collaboration and flexibility are also highly valued by employees in the region. A significant 87% of employees emphasise the importance of collaboration, and 81% value flexibility in their roles. These figures surpass global averages of 63% and 65%, respectively, reflecting a regional culture that values teamwork and adaptable work arrangements.





Furthermore, the survey reveals that managerial positions correlate with higher job fulfilment, with 80% of managers reporting satisfaction, compared to 69% in non-managerial roles. This suggests that leadership positions offer greater satisfaction, likely due to increased responsibilities and rewards, emphasising the significance of career advancement opportunities in maintaining employee satisfaction and retention.

For leaders: How can you build a dynamic and supportive environment that propels organisational success and strengthens the region's standing in the global market ?

- ||| **Ensure that the organisation's vision and strategy** are communicated clearly and with transparency at all levels.
- ||| **Build employee-centric practices** to drive and sustain change, and maintain a motivated workforce that aligns with the organisation's long-term goals.
- ||| **Ensure fair compensation and pay structures** that reflect market standards and employee contributions.
- ||| **Create a culture that empowers employees** to make decisions and contribute to change.
- ||| **Continue to cultivate trust and a positive work environment** by treating employees fairly and valuing their input, thereby strengthening their commitment to the organisation.

Despite positive job sentiment, the appetite for career change remains strong



Despite high levels of employee satisfaction in the Middle East regarding compensation and working conditions, there is a strong desire for further financial improvement and career advancement. In the region, 82% believe they are fairly paid, compared to 72% globally, and nearly three quarters find their current job fulfilling. However, this satisfaction does not diminish their ambitions for further financial growth and career progression, indicating a continuous drive for better remuneration and professional development. This is evidenced by 71% of respondents planning to ask for a pay raise in the next 12 months, a notable increase from the 43% globally.

Similarly, 67% of employees are seeking promotions, compared to nearly a third globally, and 44% are considering changing employers, as opposed to only 28% globally. The growing appetite for changing employers is also evident with the [PwC Middle East Hopes and Fears Survey 2023](#) revealing that 39% of respondents were likely to switch employers last year. These figures reflect a fluid workforce driven by aspirations for career progression and higher earnings.

Q How likely are you to take the following actions within the next 12 months?

■ Not likely ■ Slightly likely ■ Moderately likely
■ NET: Very/ Extremely likely ■ Don't know

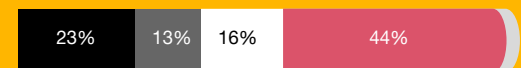
Ask for a pay raise



Ask for a promotion



Change employer



The region's rapid pace of change, driven largely by organisational leaders aligning with the long-term goals of regional governments, further fuels employees' desire for growth. This creates a competitive job market where employees are eager to acquire specialised skills and leverage their expertise for better career prospects. Reports from leading recruitment firms validate this trend. According to the Hays Middle East's GCC Salary Guide 2024¹, 31% of professionals in the GCC plan to change companies this year in search of better opportunities, indicating that investing in skills development could lead to increased job satisfaction and stronger employee loyalty.

For leaders: What can you do to retain talent in the region?

- **Develop a compelling employee value proposition** focusing on rewards, benefits and recognition, to ensure that top employees feel valued and motivated to contribute to the organisation's success.
- **Define and communicate clear career advancement opportunities** within the organisation to help employees envision their future in the company and stay motivated to grow within it.
- **Prioritise robust training and development initiatives** to elevate employee competencies, empowering them to meet the demands of a dynamic landscape, enhance their job satisfaction, and progress in their careers.
- **Foster a culture of continuous learning** and improvement by integrating these principles into daily work routines and offering resources and support for employees to acquire new skills and achieve professional growth.

02 Embracing change: A workforce driven to upskill by the twin forces of tech and climate

Rapid technological advancements and the urgency to address the climate crisis are reshaping the employment landscape in the region, fueled by a strong appetite among employees to acquire new skills. According to our survey, 63% of respondents believe that technological change, especially the rise of AI, GenAI and robotics, will impact their jobs in the next three years, compared to 46% globally. Additionally, 54% of respondents stated that climate change would impact their jobs, compared to 37% globally.



Our [Middle East Workforce Hopes and Fears Survey 2023](#) highlighted a “skills-first” approach that enables employees to adapt to a fast-changing job market. This sentiment persists, as employees recognise that their roles are evolving due to significant influences of technology and climate change. More than half of our 2024 survey

respondents indicated significant changes in their roles, with 57% reporting changes in daily responsibilities, and 61% stating they need to learn new tools and technologies to perform their jobs.

This latest survey also reveals that opportunities to learn new skills significantly influence employees' decisions to stay with their employer, with 67% of respondents highlighting this factor, compared to 47% globally. Furthermore, nearly half believe that new technologies related to climate change will require learning new skills, compared to 36% globally. This aligns with findings in the [PwC Net Zero Future 50 - Middle East](#) report emphasising the need for environment-related skills, such as climate engineering, to foster the growth of climate tech innovators in the region.

57% reporting changes in daily responsibilities.

61% stating they need to learn new tools and technologies to perform their jobs.



The region's workforce shows a strong awareness and concern for the climate crisis, with 53% fearing that climate change will introduce health and safety risks in their workplace. Additionally, almost half believe that disruptions from extreme weather events would impact their job performance, and 37% expressed concerns about potential job losses due to a climate crisis. These concerns underscore the importance of organisations to enhance their environmental focus and strengthen sustainability measures to mitigate climate-related risks.

For leaders: How can you ensure your workforce continues adapting to the twin forces of technological and climate change reshaping the employment landscape ?

- ||| **Prioritise robust and targeted training programmes** to ensure employees are well-equipped to navigate future challenges, offering guidance and developing essential capabilities in areas such as digital and green skills.
- ||| **Strengthen talent within the existing workforce** by developing and implementing a human capital strategy that aligns with organisational goals, providing comprehensive insights into employee skills and expertise to identify and nurture hidden talent.

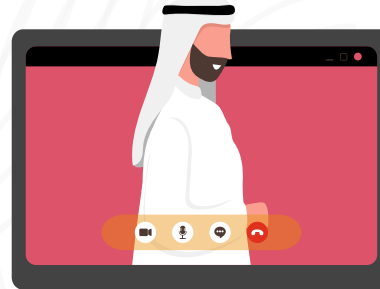
03 Choosing flexibility: A digital-first workforce embraces remote work practices

The Middle East boasts a young, tech-savvy working population and high internet and mobile device penetration rates. In recent years, regional governments have strengthened their digital infrastructure, transforming cities into high-tech hubs and revolutionising communication, work and business practices. These advancements, coupled with progressive AI and data protection regulations, have been increasing efficiency across both the public and private sector and enabling a significant shift towards remote work.

Our survey reveals that 60% of all respondents believe their jobs can be performed remotely, with 86% having worked remotely from another country in the past 12 months. The rise of remote work has fostered a culture of transparency, as evidenced by 81% of respondents having done so in the last 12 months with their employers' knowledge, compared to 51% globally.

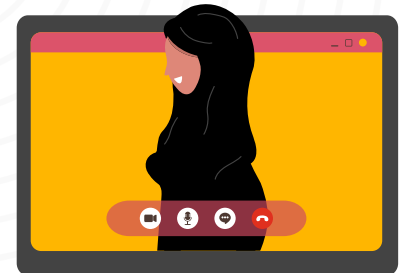
Interestingly, remote work spans across generations, with 94% of GenZ (18-27 years) and 79% of Gen X (44-59 years) having worked remotely in the past year. This widespread adoption across age groups underscores the region's adaptability and acceptance of remote work.

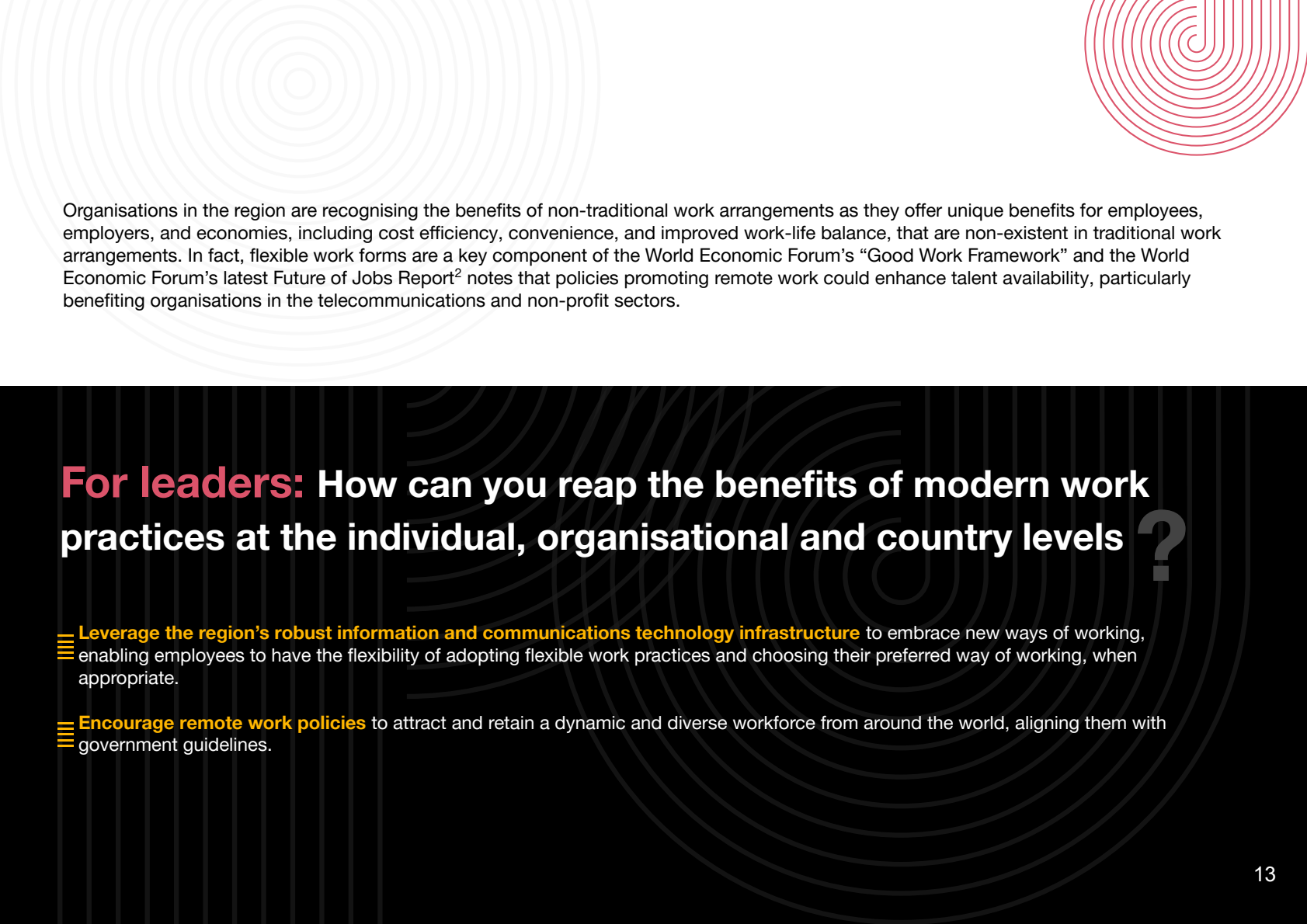
Last year, employees expressed a strong desire for autonomy, with 55% of millennials, 54% of Gen X, and 48% of GenZ preferring to choose how they perform their work. This year, this desire has manifested in tangible changes in work arrangements, reflecting a broader trend towards flexibility.



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Organisations in the region are recognising the benefits of non-traditional work arrangements as they offer unique benefits for employees, employers, and economies, including cost efficiency, convenience, and improved work-life balance, that are non-existent in traditional work arrangements. In fact, flexible work forms are a key component of the World Economic Forum's "Good Work Framework" and the World Economic Forum's latest Future of Jobs Report² notes that policies promoting remote work could enhance talent availability, particularly benefiting organisations in the telecommunications and non-profit sectors.

For leaders: How can you reap the benefits of modern work practices at the individual, organisational and country levels ?

- ≡ **Leverage the region's robust information and communications technology infrastructure** to embrace new ways of working, enabling employees to have the flexibility of adopting flexible work practices and choosing their preferred way of working, when appropriate.
- ≡ **Encourage remote work policies** to attract and retain a dynamic and diverse workforce from around the world, aligning them with government guidelines.

04 Easing workplace pressures: Workers embrace GenAI in a dynamic job market

In the Middle East, proactive government policies and initiatives driving technological advancement have cultivated an atmosphere of innovation, fostering employee optimism about the impact of technological changes on their jobs.

There has been a remarkable surge in technology investments, with governments, private sector organisations and investors increasingly focusing on areas such as GenAI, machine learning, blockchain and digitisation. In the GCC, technology investments are projected to soar to a remarkable US\$24.7 billion by 2030³. At the World Government Summit in Dubai earlier this year, the Advanced Technology Research Council unveiled a US\$500 million programme⁴ to advance research in AI and other emerging technologies. In addition to enhancing the region's technological infrastructure, these substantial investments are also driving innovation and supporting economic growth.

According to our survey, 63% of respondents anticipate a higher impact of technological changes on their jobs in the next three years, compared to the global average of 46%. Moreover, only 26% of respondents in the Middle East state that they do not know how to use AI tools, suggesting high AI literacy. This optimism is fueled by a consistently higher adoption and integration of AI tools in work routines across the region. Notably 81% of employees have used GenAI at work in the past 12 months, compared to 61% globally, with 25% using it regularly, versus only 12% globally.





These sentiments are echoed in PwC's [27th Annual Global CEO Survey: Middle East findings](#), where regional CEOs expressed greater optimism about GenAI's potential to enhance work efficiency compared to their global counterparts. Specifically, 74% of regional leaders believed that GenAI could improve their employees' work efficiency, compared with 64% globally.

Despite over half of the region's employees (58%) reporting increased workload in the last 12 months, a vast majority stands to benefit from GenAI. Still, our survey data highlights that 17% of employees currently do not feel encouraged to use GenAI tools at work, which is likely due to a lack of understanding of its benefits and usage. Leaders hence have an opportunity to address this by fostering greater adoption of GenAI tools within their operations, thereby alleviating workload pressures and boosting productivity.

Respondents' insights on GenAI benefits:

85%

Will create opportunities to learn new skills

84%

Will boost creativity at work

73%

Will increase work efficiencies

68%

Will provide job security

66%

Will increase salary



Interestingly, roughly half of the survey respondents recognised risks associated with GenAI, while 64% indicated it is likely to increase bias and 56% said it could provide incorrect or misleading information that seems credible. Where GenAI is concerned, risks to privacy, cybersecurity, regulatory compliance have already emerged and it is the balancing the risks with the rewards of innovation that will ensure sustained outcomes.

At the recent Intersec 2024 Cyber Security Conference⁵ hosted by the UAE Cyber Security Council, significant security risks and governance challenges associated with the widespread GenAI adoption in the region, like ChatGPT, were highlighted, focusing on privacy, confidentiality and cyber fraud risks. The UAE's National Strategy for AI 2031 aims to enhance cybersecurity in AI deployment through robust governance, while Saudi Arabia mandates adherence to AI Ethics Principles outlined by Saudi Authority for Data and Artificial Intelligence (SDAIA)⁶ for all stakeholders engaging with GenAI tools, ensuring ethical considerations from development through maintenance.

Daily GenAI users—and what you can learn from them..

Who are the daily users in your workforce?

Workers who use GenAI every day, both at work and outside of work, typically:

Are younger

30%

Being mostly GenZ

25%

Millennials

Are skilled

30%

Having undergone specialist training

Have roles in

44%

Financial sector

31%

Technology, media and telecommunications

22%

Industrial manufacturing & automotive

19%

Government and public services

15%

Consumer markets

13%

Health





For leaders: How can you use GenAI integration and the fostering of a culture of innovation to maintain a competitive advantage in the market ?

- ≡ **Actively promote the use of GenAI tools** across various functions such as data analysis, customer service and process automation to boost efficiency and reduce costs.
- ≡ **Capitalise on employees' positive outlook toward AI adoption** by encouraging and empowering them to use GenAI tools, thereby boosting overall productivity.
- ≡ **Implement GenAI training programmes** to strengthen literacy and equip employees with the necessary skills to maximise these tools' potential and adapt to future technological advancements and market demands.
- ≡ **Encourage the ethical and effective use of GenAI** by following established frameworks, such as PwC Middle East's [GenAI ethical framework](#), to build trust in the technology, data and outputs.

Conclusion

The workforce of the Middle East is on the brink of a transformative journey. Employees recognise the need for their organisations to evolve and are aligned with their long-term visions, showcasing unwavering confidence in leadership and a hunger for skill development.

To harness this momentum, leaders must take decisive actions by prioritising robust training and development initiatives, championing flexible work arrangements, and embracing cutting-edge technologies like GenAI. By fostering a culture of continuous improvement, transparency and collaboration, organisations can significantly enhance employee satisfaction and secure a sustained competitive edge in the global market.

The future belongs to those who are ready to adapt, innovate and lead with unwavering conviction. By helping employees understand the necessity of change and empowering them to contribute, business leaders can build a workforce that is excited and eager to help turn their vision into reality.



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