



AI momentum grows as regional employees prioritise skills and job security

Middle East Workforce Hopes and Fears Survey 2025



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Executive summary

Across the Middle East, work is being rapidly reshaped by advances in technology, evolving skills priorities and shifting employee expectations. PwC's Middle East: Workforce Hopes and Fears Survey 2025, capturing the views of 1,286 public and private sector employees, shows a workforce that is not just adapting to change, but actively leaning into it. Employees are engaged, motivated and increasingly ready to lead the integration of AI into daily work.

AI is now firmly embedded in daily work, with employees reporting high usage and stronger gains in productivity, quality, creativity and confidence than their global peers – fuelled in part by national digital agendas and sustained investment in skills.

A strong learning culture is developing with employees in the region prioritising transferable skills and building new capabilities, while leaders play a more active role in accelerating the development of future-ready talent by offering support and expanding access to upskilling opportunities.

For employees in the Middle East, motivation and trust remain among the highest globally, yet rising workloads mean ambition is now accompanied by fatigue, feelings of being overwhelmed and concern for wellbeing. At the same time, they are recalibrating expectations on pay and progression and paying more attention to stability with job security now being a top priority, at higher rates than their global counterparts.

This is a workforce that is ambitious, optimistic and ready to grow, but one that needs clarity and support to sustain its performance. Organisations that communicate openly, invest in continuous learning and new technologies and prioritise employee wellbeing will be best positioned to convert today's momentum into lasting progress, resilience and growth.



Key findings



75%

of regional respondents¹ have used AI in their jobs in the past 12 months, compared to 69% globally

82%

of respondents in the Middle East¹ say AI has improved their productivity, compared to 77% of their global peers

69%

of regional respondents have learned new skills in the past 12 months, compared to 56% globally



85%

of the regional workforce surveyed say job security is a top priority when considering new roles, compared to 79% globally



46%

of Middle East respondents plan to ask for a pay rise, well below last year's 71%

45%

of regional employees surveyed report feeling fatigued at work, indicating rising work intensity, even as engagement remains high

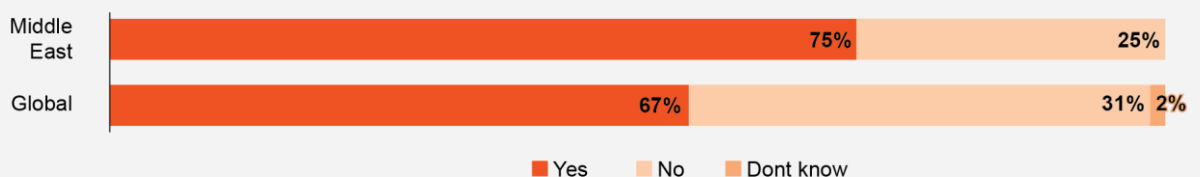
01 Middle East AI adoption in jobs outpaces the global trend

Technology continues to be a powerful force reshaping employment, a reality employees in the region recognise more acutely than their global counterparts. Nearly half of regional employees (49%) expect technological change, including AI, robotics and automation, to impact their jobs to a large or a very large extent over the next three years, compared with 45% globally.

This expectation reflects the changes already underway in the region. Organisations across the Middle East are adopting AI faster than their global peers, integrating automation, analytics and GenAI tools into core operations. This accelerated uptake is driven by both ambition and necessity: Organisations recognise that early adopters will capture the greatest value as AI becomes a defining driver of productivity and growth. PwC research suggests that widescale AI adoption could add 8.3% to Middle East GDP over the next decade, highlighting the strategic importance of moving early.²

Similarly, employees in the region are actively integrating AI in their daily work, at a faster rate than the global average. Specifically, a notable 75% of regional respondents have used AI in their roles in the past 12 months, compared to 67% globally, signalling relatively greater exposure to technology-enabled transformation. When looking specifically at GenAI tools such as ChatGPT or DALL-E, 32% of Middle East employees use them daily, compared with 28% globally. This illustrates not only higher adoption, but also greater readiness and comfort with next-generation technologies across the region.

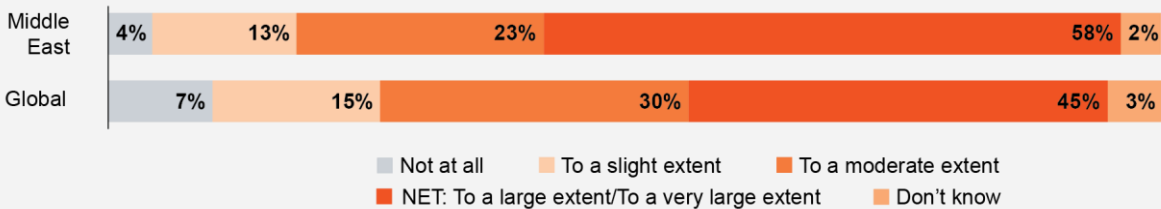
At the same time, concerns about AI have eased since last year's PwC Middle East Workforce Hopes and Fears Survey, when 63% expected technological change to impact their jobs to a large or very large extent, compared to 49% that feel the same today. This suggests that AI is shifting from a source of uncertainty and disruption to a more familiar and manageable reality.



Q: Have you used AI in your job in the last 12 months?

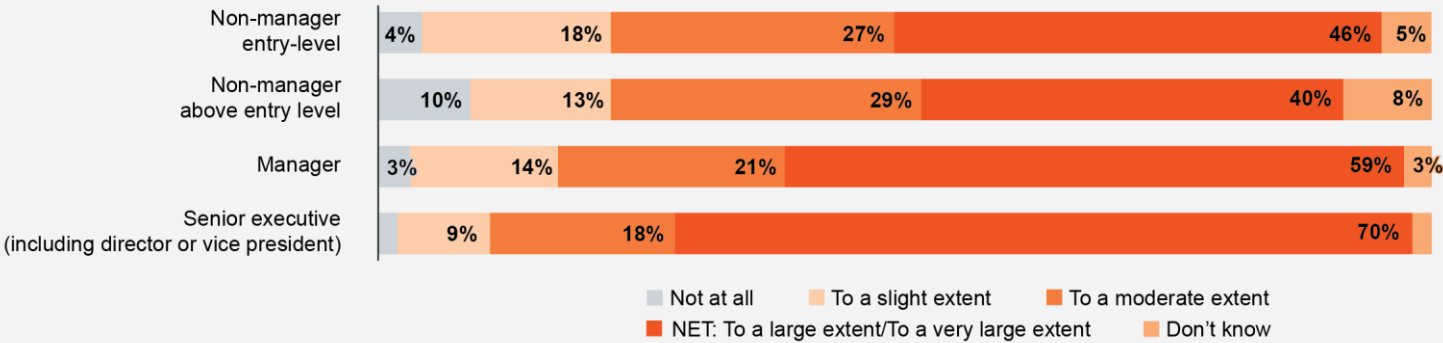
Greater confidence in navigating technological change

Confidence in managing technological change is higher among Middle East employees than the global average. More than half of office employees (58%) in the region feel they have significant control over how technology will shape their work, compared with 45% of their counterparts globally – reflecting the region’s growing ability to navigate technological change as it becomes increasingly embedded in workplace culture.



Q: Over the next three years, to what extent will you have control over the ways technology affects your work?

Confidence is even higher among senior leaders in businesses and organisations across the Middle East with 70% of senior executives and 59% of managers feeling optimistic in how technology is shaping their work, compared with just 46% of entry-level employees.



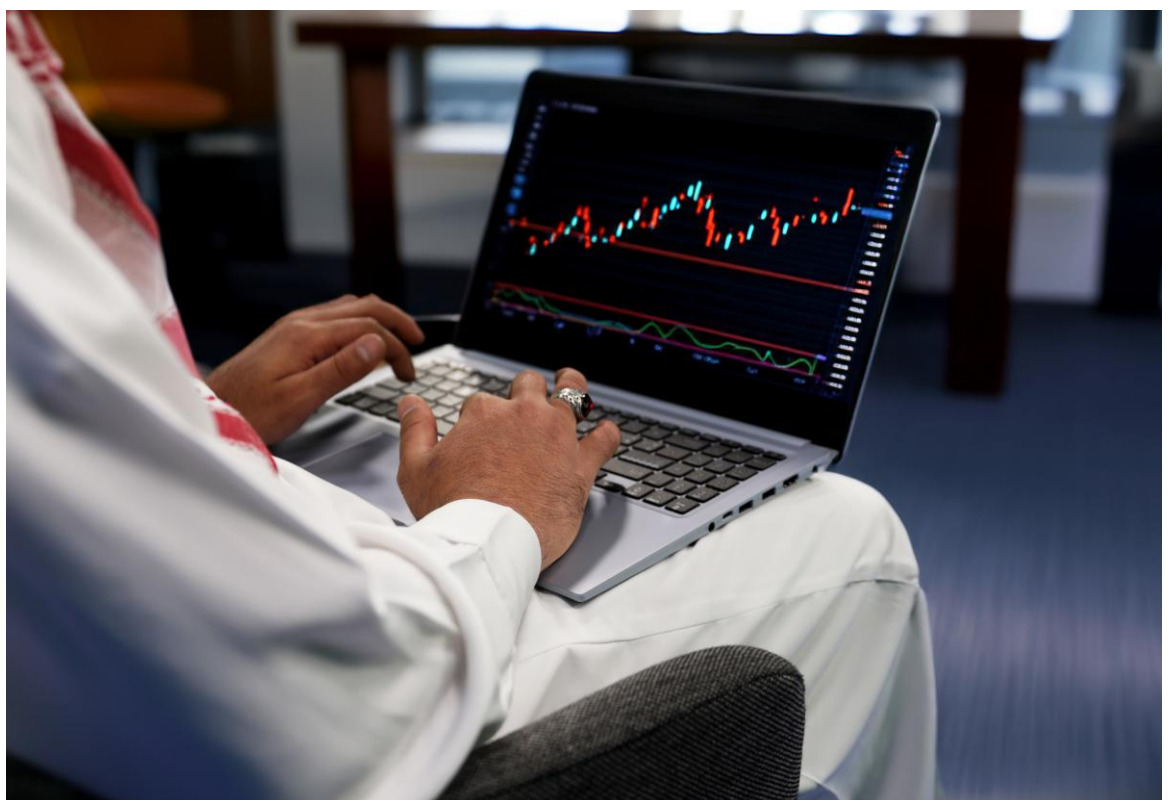
Q: Over the next three years, to what extent will you have control over the ways technology affects your work? [Perceived change by organisational levels]

Moving forward, clear communication about how AI is being applied and where it creates opportunity will be essential to ensuring employees at all levels view emerging technologies as a source of empowerment rather than disruption.

The Middle East leads in AI optimism and is already seeing measurable benefits

Despite global anxiety about AI's impact on jobs³ – especially for employees at the entry level – sentiment towards AI in the Middle East is notably more positive. Employees in the region view emerging technologies as tools that enhance productivity and creativity rather than threats to job security. Sixty-one per cent of office employees surveyed in the region feel excited about AI's impact, compared with just 47% globally. This aligns with the findings of [PwC's 28th Annual CEO Survey: Middle East Findings](#), where 70% of GCC CEOs expect GenAI to increase profitability within a year; reflecting a shared sense of optimism and enthusiasm about AI, viewing it more as an opportunity for advancement than a cause for concern.

This regional optimism towards AI is underscored by the presence of clear government direction. Strategies such as the UAE National Strategy for Artificial Intelligence 2031, KSA National Strategy for Data & AI (NSDAI) and Qatar National Artificial Intelligence Strategy, provide clarity about the role of AI, reducing uncertainty and creating excitement around AI's role in the future of work.



The benefits of AI are already visible.

8 in **10** regional employees say AI has improved their productivity

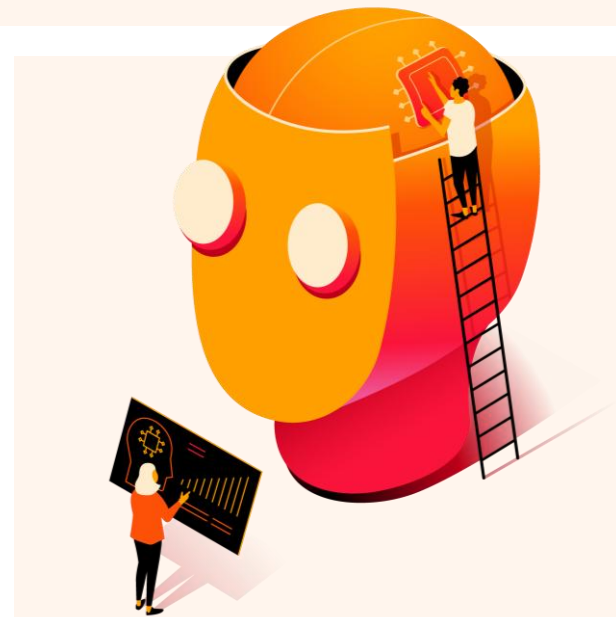
87%
report higher-quality work

and

84%
report greater creativity, all above global averages

55%
say AI has had a positive impact on their perceived job security (compared to 46% globally)

48%
report similar benefits expected for pay (vs 41% globally)



These results indicate that Middle East employees feel more assured than their global peers that AI is strengthening their stability and career prospects.

Optimism about the future remains equally strong.

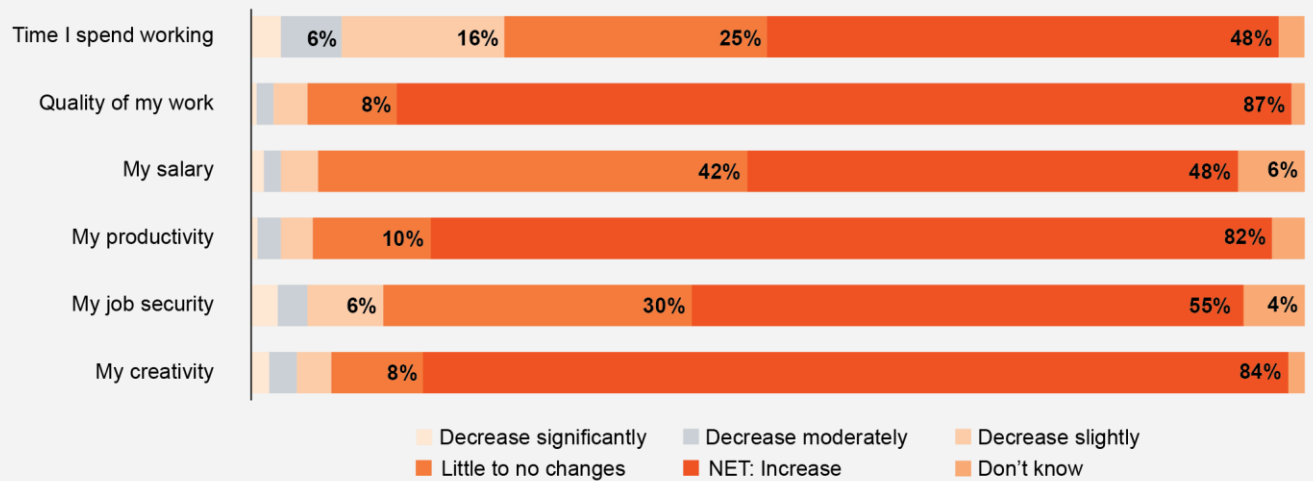
79% of regional employees expect AI to further improve productivity

83% foresee higher-quality work and **78%** anticipate enhanced creativity in the next three years

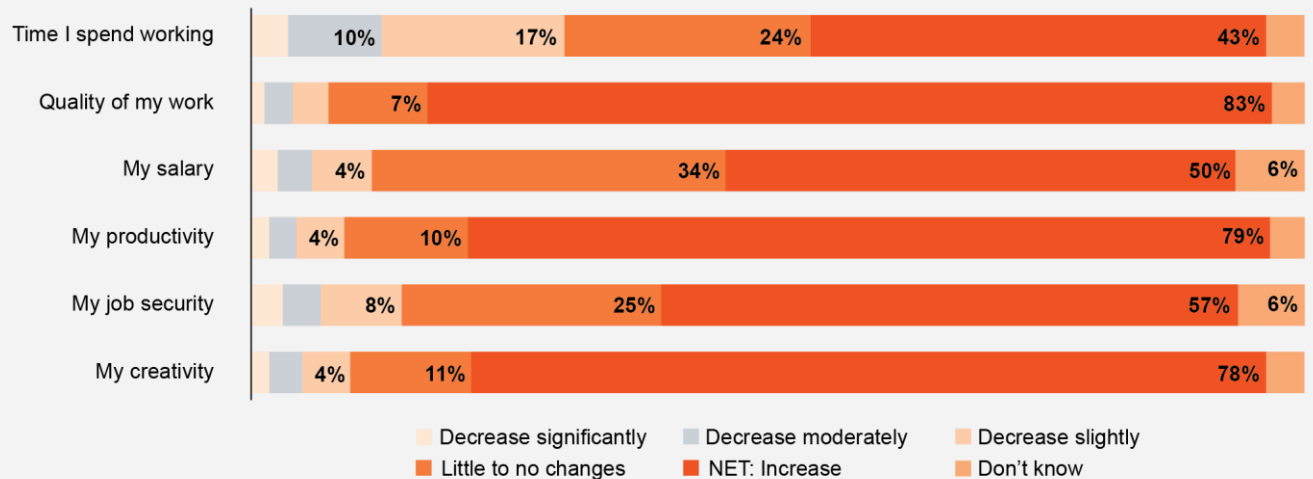


57% also believe AI will increase job security, well above the global average of 43%, reflecting confidence in AI's potential to unlock new opportunities for growth





Q: In the last 12 months, to what extent did AI increase or decrease the following aspects of your job?



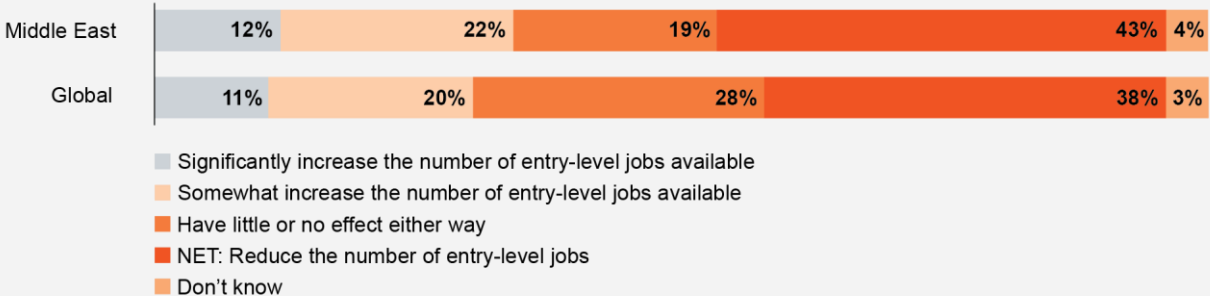
Q: In the next three years, to what extent do you believe AI will increase or decrease the following aspects of your job?

The pace of change has been rapid. Just two years ago, in the PwC Middle East Workforce Hopes and Fears Survey 2023, only 46% of respondents believed AI would increase their productivity. Today's findings show how dramatically both perceptions, and real impacts, have evolved.

The Middle East's experience demonstrates that with clear policy direction, sustained investment and open communication and a strong culture of innovation, technology can enhance both performance and confidence; it has enabled the workforce to not merely adapt to AI, but to already benefit from it.

AI’s impact on entry level roles requires further clarity

Regional leaders across businesses and organisations hold a more nuanced view on how AI is reshaping work. Nearly half (43%) of senior executives and managers in the region believe AI will reduce entry-level roles (vs 38% globally), while 34% expect these roles to increase (vs 31%).



Q: What impact do you think AI will have on entry-level roles in your organisation over the next three years? [Selective respondents: Senior executive (including director or vice president) OR Managers]

This split suggests that business and organisational leaders in the region see both risk and opportunity ahead. While some repetitive entry-level tasks may be automated, AI is also expected to create new analytical, creative and technology-enabled roles that expand, rather than diminish overall opportunity. According to the World Economic Forum, while 62% of global employers intend to hire new people with skills to work alongside AI, 41% also foresee workforce reductions in areas where the technology can replicate people’s work.⁴

Despite mixed opinions from leadership, younger employees in the region are demonstrating significantly higher confidence in AI’s potential. Millennials (29-44 years old) and Gen Zs (18-28 years old) are among the most hands-on with AI tools, adopting new technologies quickly and often outpacing older cohorts in everyday usage and creative application. This puts them in a strong position to adapt to the technological demands of entry-level and early-career roles, where AI-enabled tools are increasingly embedded in day-to-day work. For organisations, this is an opportunity to leverage younger talent to enhance adoption and performance, while providing guidance, clarity and support as AI continues to reshape the future of work.

02

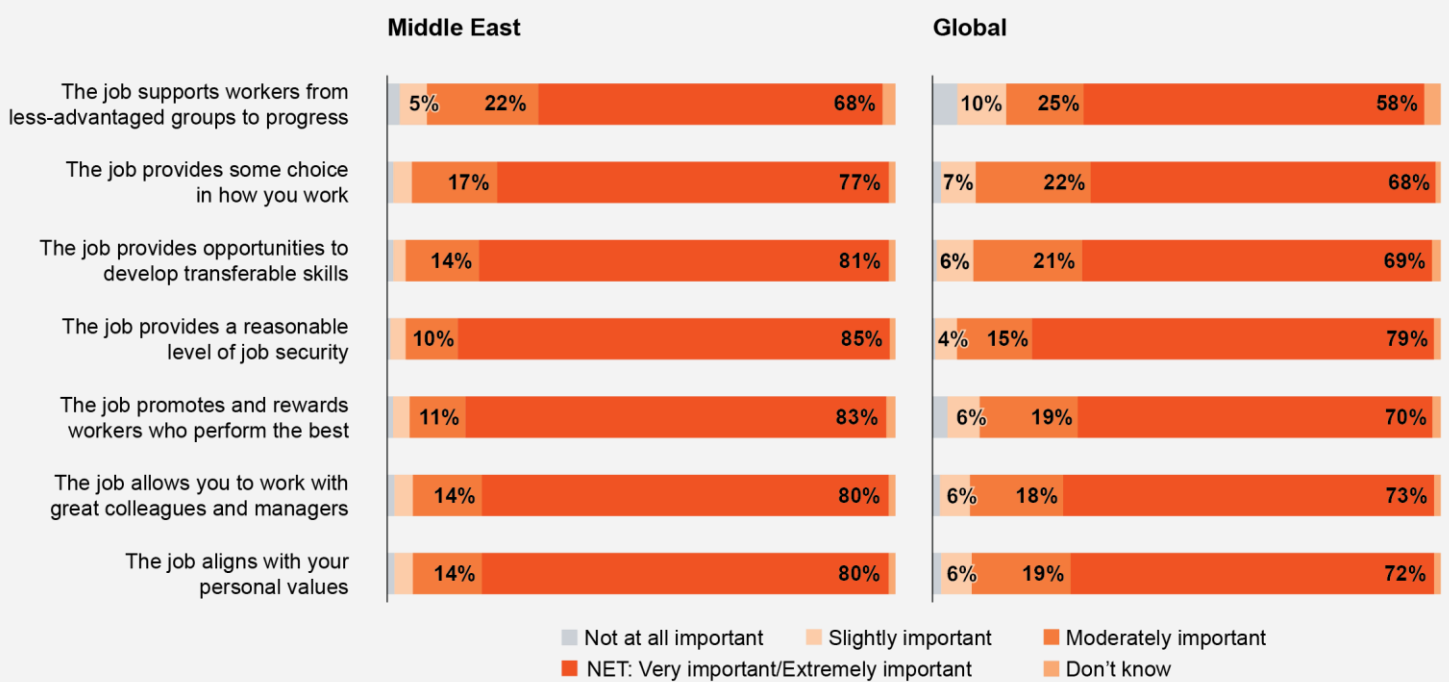
A skills-first future with a commitment to learning, adapting and growing

As technology reshapes the world of work, employees across the region are responding with a determination to learn, adapt and grow.

Globally, in occupations most exposed to AI, the skills employers seek are evolving 66% faster than in less-exposed roles, according to PwC's 2025 Global AI Jobs Barometer.⁵ The World Economic Forum also estimates that 39% of the global workforces' existing skills will change by 2030. This shift is expected to significantly impact the Middle East, where workers in Egypt (48%), the UAE (41%) and Saudi Arabia (40%) will face some of the fastest-changing core skill demands globally. These findings indicate the rising importance of upskilling in supporting the region's transition towards skills-first, knowledge-based and diversified economies.⁶



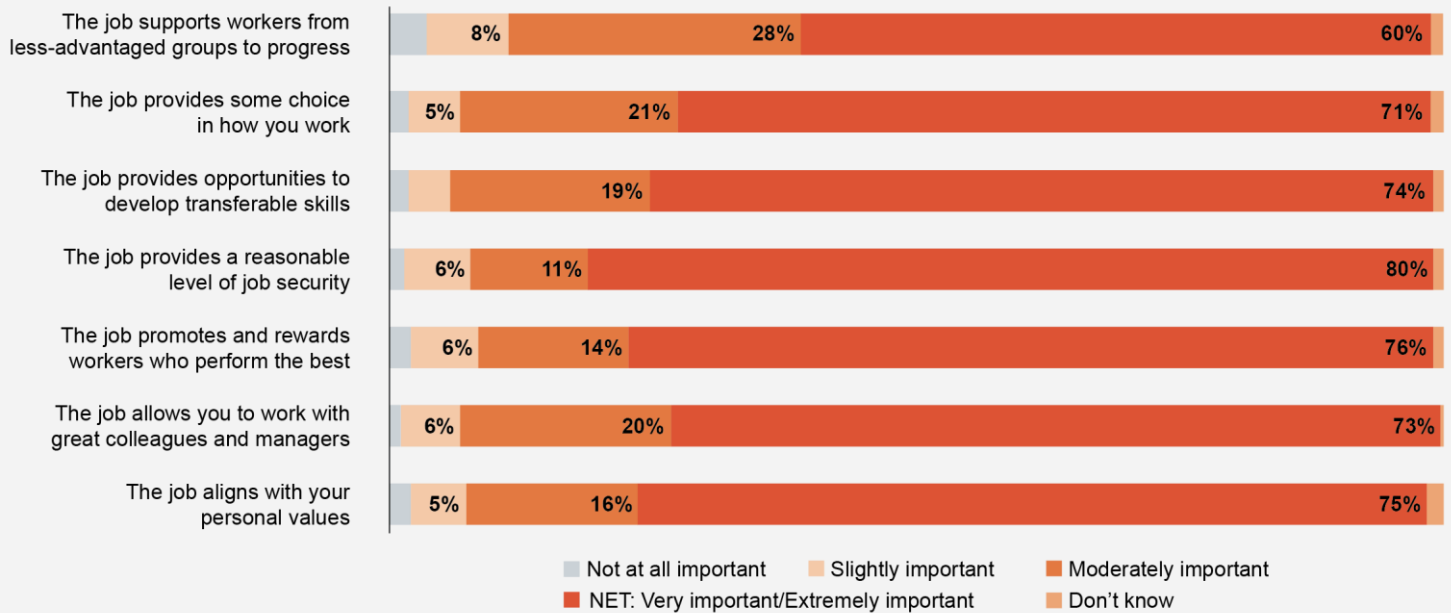
Upskilling becomes a clear career priority and a strong learning culture is taking shape



Q: When thinking about a job that is a good fit for you, how important is each of the following?

Employees in the Middle East are increasingly aware that skill requirements are changing and are actively prioritising upskilling. In the region, 81% of employees say they would prefer a job that offers opportunities to build transferable skills, compared with 69% globally. This sentiment is notably strong among Gen Z, with 74% expressing the same preference.

Middle East - Gen Z



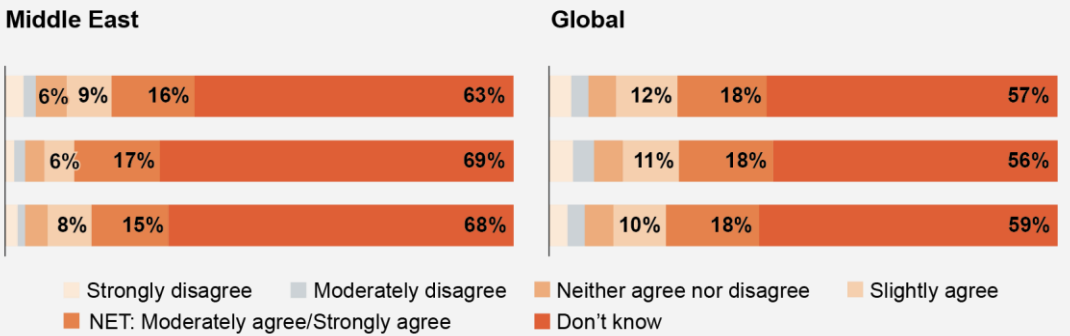
Q: When thinking about a job that is a good fit for you, how important is each of the following?
[Gen Z split – 18-28]

Nearly seven in 10 employees in the Middle East say that they have learned new skills in the past year, highlighting a strong appetite for continuous development and proactive capability building across the workforce. These efforts are supported by a solid foundation in the region for upskilling, with 68% of employees saying they have access to the learning and development resources they need, significantly higher than the global average of 59%.

This growing commitment to skills development is not happening in isolation. It closely mirrors national strategies across the region that prioritise AI-ready talent and continuous learning, including Saudi Arabia's National Skills Platform,⁷ the UAE's National Strategy for AI 2031⁸, and Qatar's Erada Program,⁹ all of which place continuous learning at the heart of future workforce development.

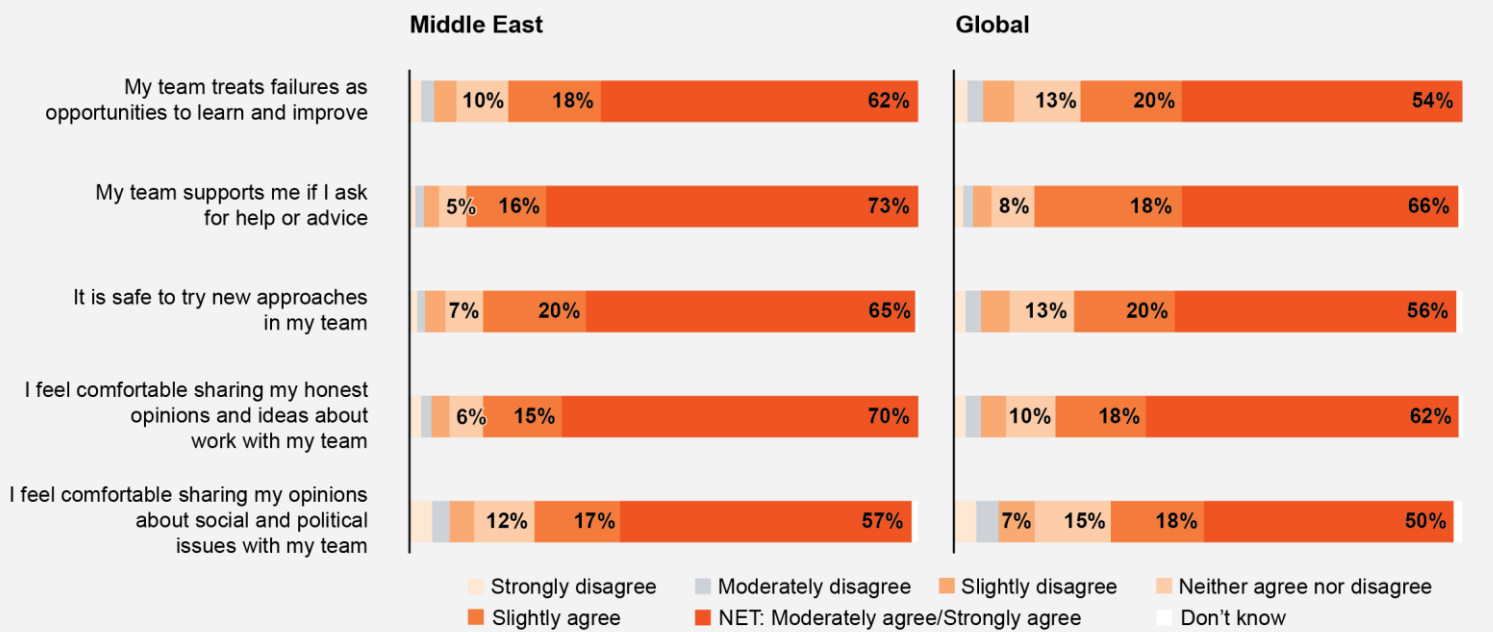
A supportive environment is encouraging growth

The growing commitment to skills development is also reflected within workplace dynamics. Direct managers play a pivotal role in facilitating and sustaining employee intentions and efforts to upskill. Nearly two-thirds (63%) of employees in the Middle East say their manager supports them in building new capabilities (vs 57% globally), indicating that coaching, encouragement and promoting access to developmental opportunities are becoming part of day-to-day management. These findings also reveal the importance of leadership accountability in capability building, while reinforcing that organisations that embed mentorship into managerial performance expectations are more likely to sustain engagement and continuous growth.



Q: To what extent do you agree or disagree with the following statements?

The managerial support is complemented by a more open and cooperative team culture. Employees increasingly feel comfortable to experiment and learn from one another with 65% saying they feel safe trying new approaches (vs 56% globally) and 62% reporting they their team views failures as opportunities to learn (vs 54% globally).



Q: To what extent do you agree or disagree with the following statements about your current work team?

Together, these efforts signal a shared regional commitment to building future-ready talent and strengthening competitiveness in an era of rapid technological change.

03

Engagement, motivation, and trust remain key enablers – but wellbeing is under strain

Employees across the Middle East remain among the most motivated and purpose-driven in the world. This year's findings show how pride, purpose and performance continue to reinforce one another, sustaining strong engagement across the region.

78%

of employees look forward to going to work (vs 64% globally)

84%

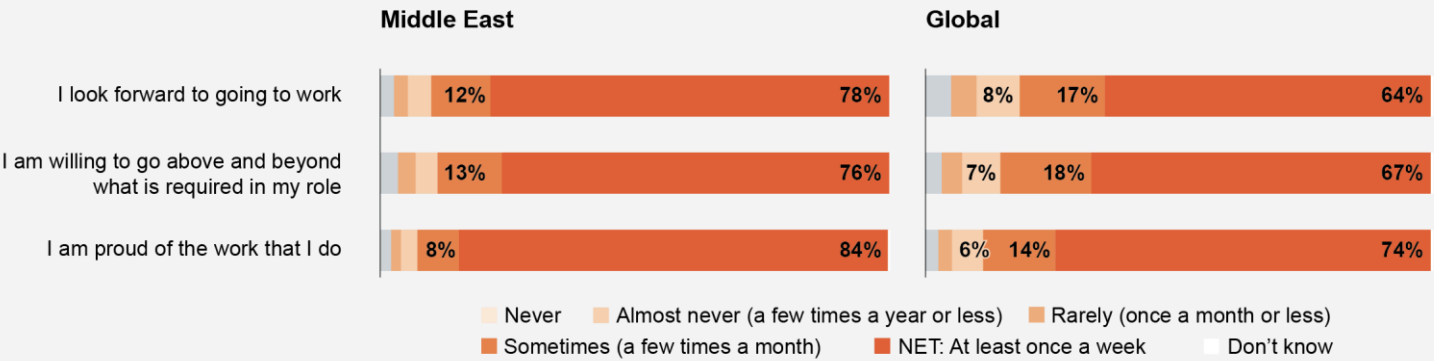
feel proud of what they do (vs 74% globally)

76%

are willing to go above and beyond their roles (vs 67% globally)

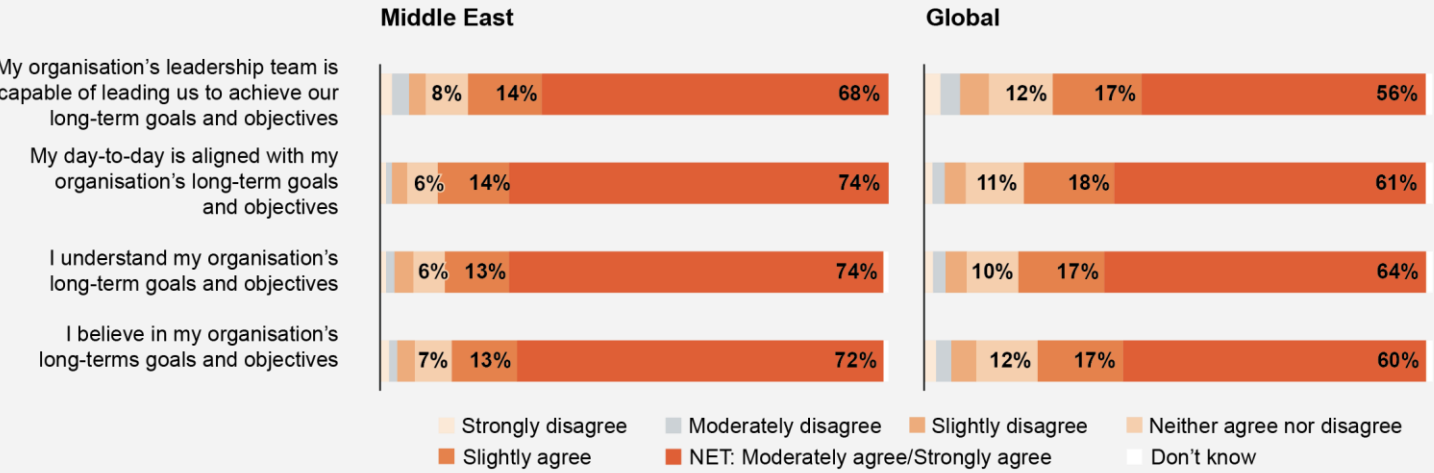
Together, these indicators point to a regional workforce deeply invested in its work and aligned with organisational ambition for progress and innovation.





Q: How often do you have the following feelings about your job?

In addition to personal motivation, regional employees also express a strong sense of connection to their organisation’s strategic direction: 74% say their day-to-day work aligns with their organisation’s long-term goals (vs 61% globally) and 72% believe in these long-term goals (vs 60% globally). However, while still above global averages, both measures have declined significantly since 2024 (down from 88% and 86% respectively) indicating that – while strongly committed – employees will require frequent clarity from employers as organisations accelerate transformation.

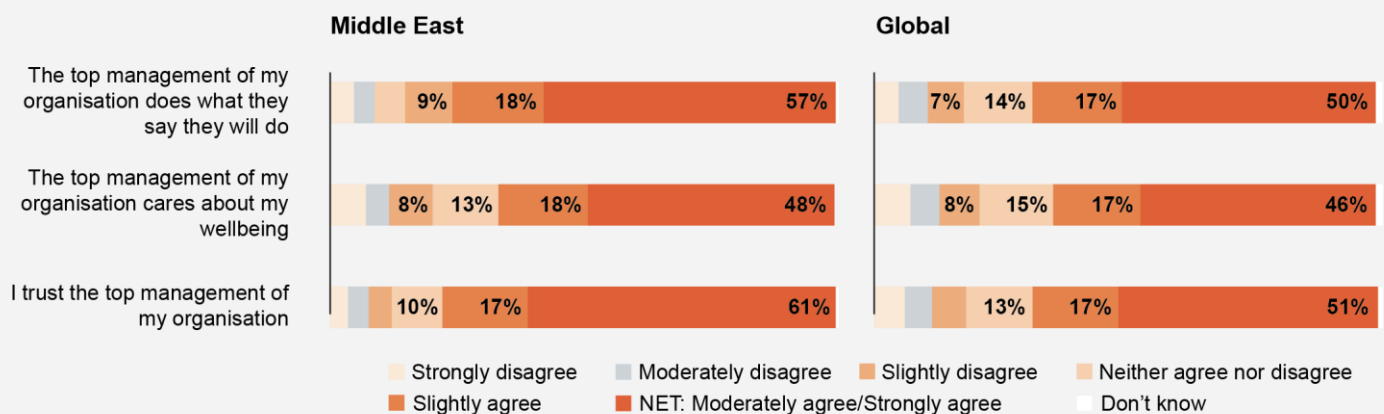


Q: Thinking about your organisation’s long-term goals and objectives, to what extent do you agree or disagree with the following statements?

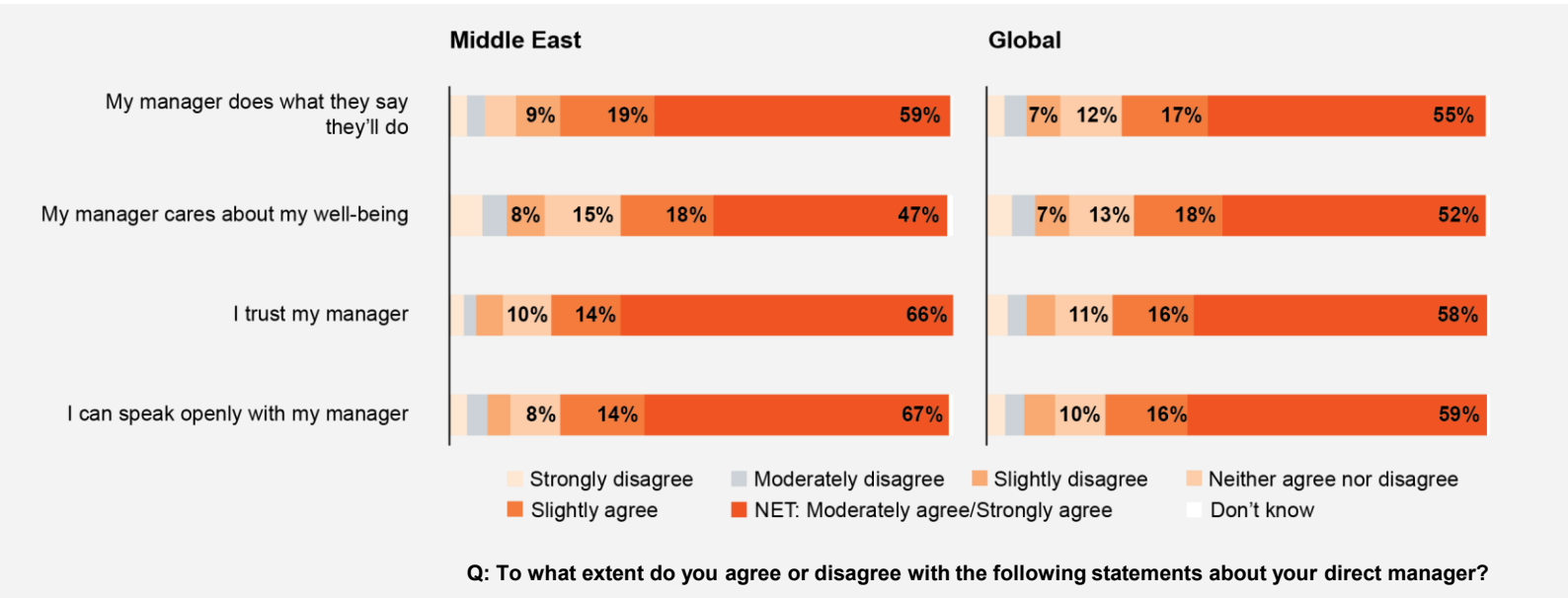
Trust in leadership is high, with scope for certain enhancements at the manager level

Sixty-one per cent of employees say they trust senior leadership (vs 51% globally), describing them as transparent, reliable and attentive to wellbeing. Similarly, 66% of employees say they trust their direct managers (vs. 58% globally) and many also report strong psychological safety in their immediate teams – with 73% saying they feel supported when asking for help (vs 66% globally) and 70% feeling comfortable sharing their opinions (vs 62% globally).

However, some of the elements that build trust and shape day-to-day employee experience present an opportunity to be strengthened at the manager level. Fewer than half of regional employees (47%) feel their manager cares about their wellbeing, below the global average of 52%, revealing a potential disconnect between organisational intent and managerial practice.



Q: To what extent do you agree or disagree with the following statements about the top management of your organisation?

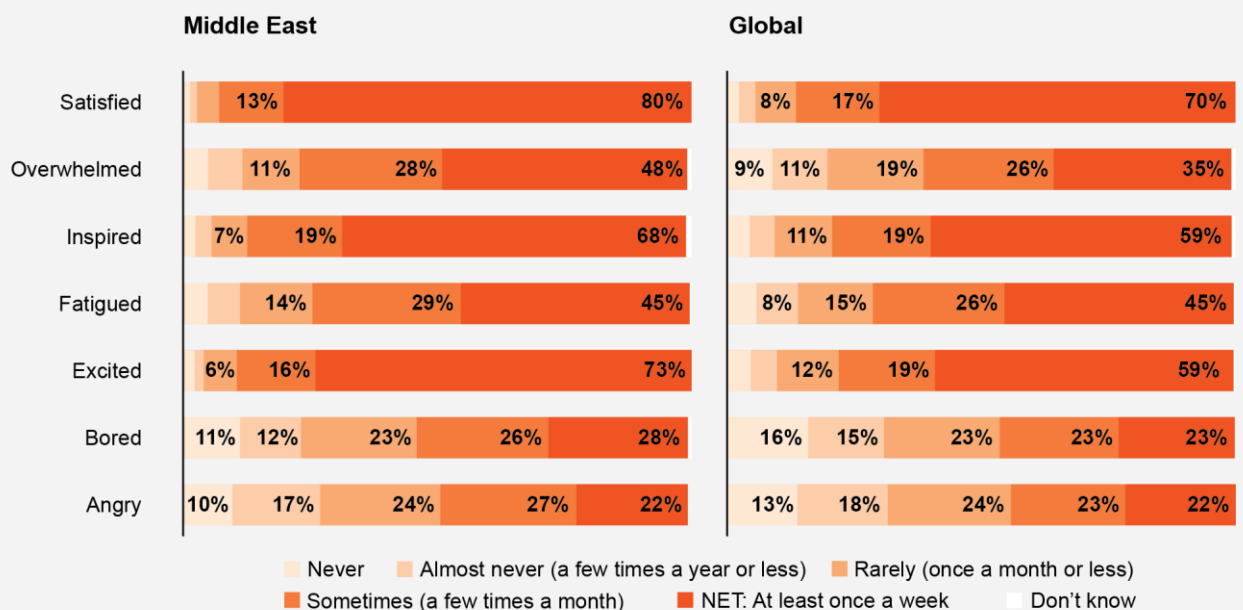


This gap underscores the need to equip managers with the capability and accountability to support employee wellbeing through regular check-ins, while integrating coaching and mentorship into performance expectations. When trust, clarity and connection reinforce one another, organisations are far better positioned to maintain engagement and sustain performance through ongoing change.

Motivation remains strong, but risk of burnout needs to be monitored

Employees in the region say they look forward to work (78%), feel proud of what they do (84%) and are willing to go above and beyond in their roles (76%) all at higher levels compared to global - reflecting a workforce that is highly engaged and an asset for organisations.

However, these high levels of motivation also come with growing pressures. Almost half (45%) of regional employees report feeling fatigued at least once a week, similar to the global average, while 48% say they feel overwhelmed, compared with 35% globally. Emotional strain is also evident: 49% of regional respondents say they feel angry at work at least a few times a month, compared with 45% globally.



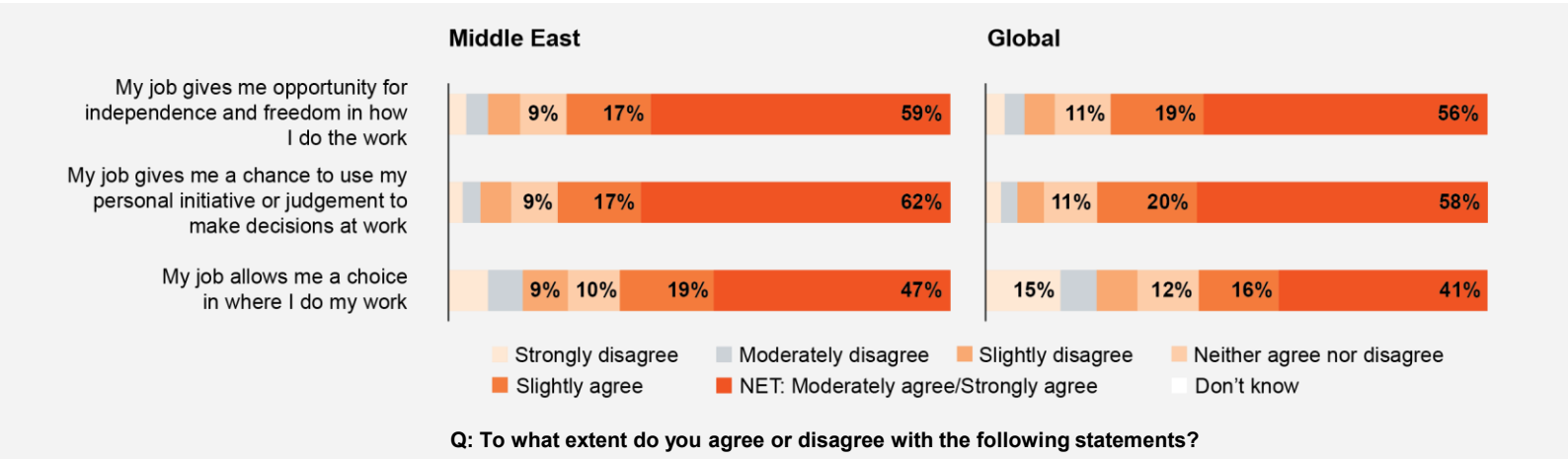
Q: How often do you have the following feelings at work?

These feelings are reflective of a pattern observed in last year's [PwC Middle East Workforce Hopes and Fears Survey 2024](#), where 58% of regional respondents said their workloads had significantly increased over the previous 12 months.

While today's workforce remains positive and engaged, it is also operating under sustained intensity, highlighting the need for organisations to balance ambition with a proactive focus on wellbeing.

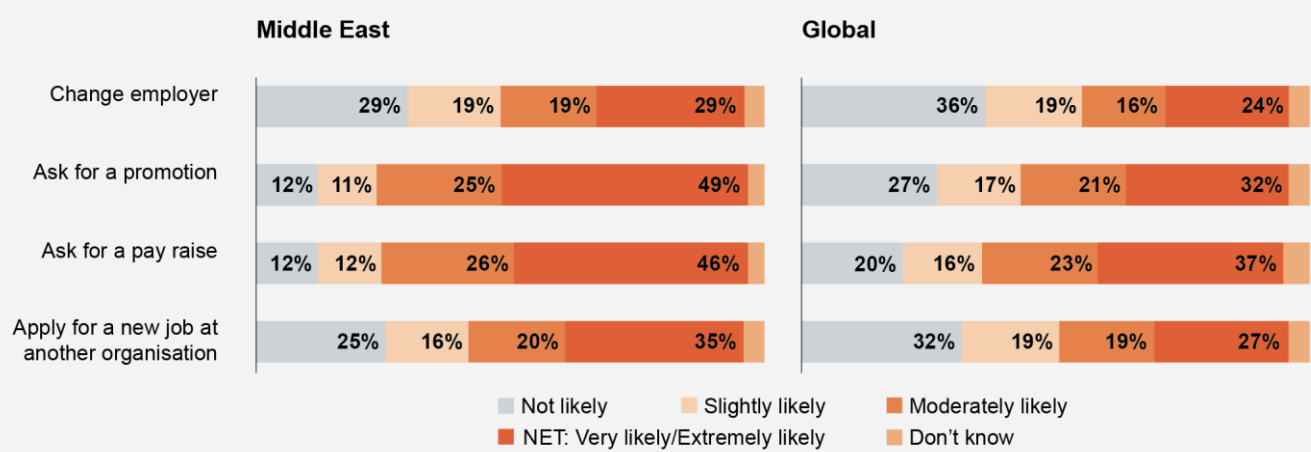
Empowerment through autonomy and flexibility

Autonomy and flexibility continue to shape employee experience and are key contributors to the positive motivation reported by employees in the region. Sixty-two per cent say they can use their own judgement and personal initiative to make decisions at work compared with 58% globally, while 59% mention they have been empowered through opportunities for independence and freedom in how they do their work (vs. 56% globally), which is a testament to growing trust and flexibility within organisational cultures.



Redefining ambition and reward, with job security now a top priority

As employees seek balance and flexibility, their expectations of career progression and reward are also evolving. Nearly half of regional employees plan to ask for a promotion (49% vs 32% globally) and 46% intend to request a pay rise (vs 37% globally). However, these numbers have fallen sharply from last year, when 67% said they planned to seek promotion and 71% planned to request a raise.

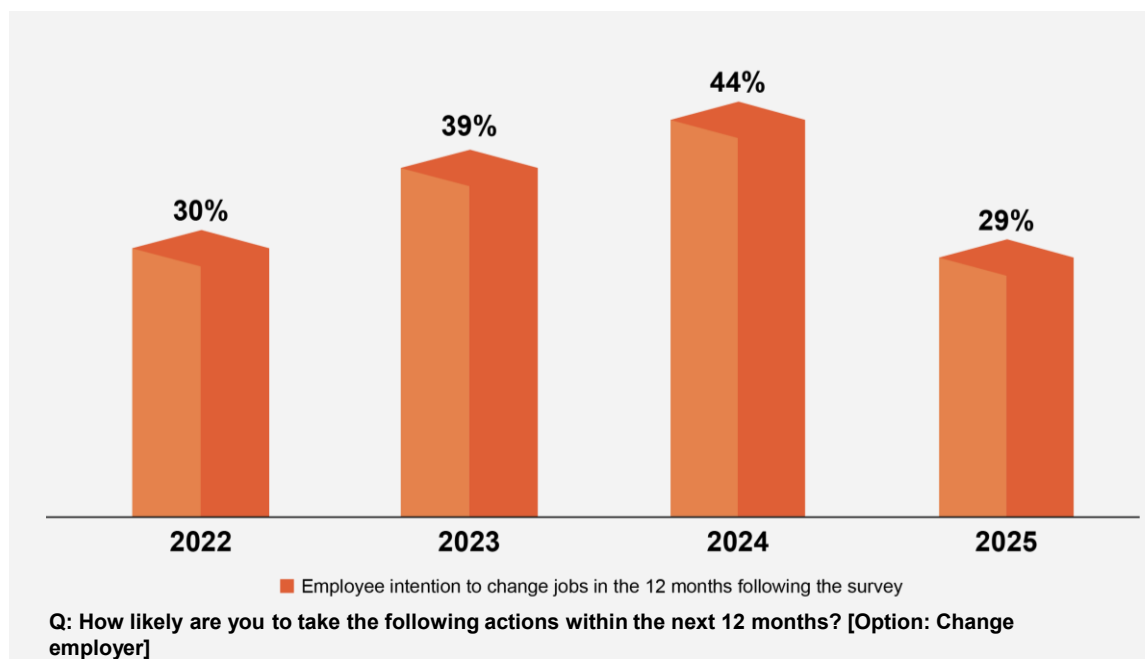


Q: How likely are you to take the following actions within the next 12 months?

Employees are also recalibrating expectations to focus more on job security. Now 85% of employees in the region prioritise job security (vs 79% globally), making stability a key factor in how people evaluate their current roles and assess future work opportunities. Job security is seen as 'very important' by 90% of Gen X (aged 45-60), 85% of Millennials (29-44) and 80% of Gen Z (12-28), making it the top priority for all three generational groups when choosing a job.

Sitting tight in a turbulent job market

After three years of rising employee intention to change jobs, this year makes a sharp drop across the Middle East. Previous PwC Middle East Workforce Hopes and Fears surveys show employees' intention to change jobs rising from 30% in 2022¹⁰ to 39% in 2023¹¹ and peaking at 44% in 2024¹² – before falling significantly this year, with only 29% likely to change employers in the next 12 months.



The shift signals a clear change in sentiment. A cooler job market, slower hiring cycles and rising concern about financial security are prompting employees to prioritise job security, deepen their skills and capabilities and wait for opportunities that offer long-term growth rather than making quick moves.

04

Key actions for business leaders – turning momentum into sustained progress

The survey reveals employees who are engaged yet stretched, curious yet cautious, motivated yet seeking balance.

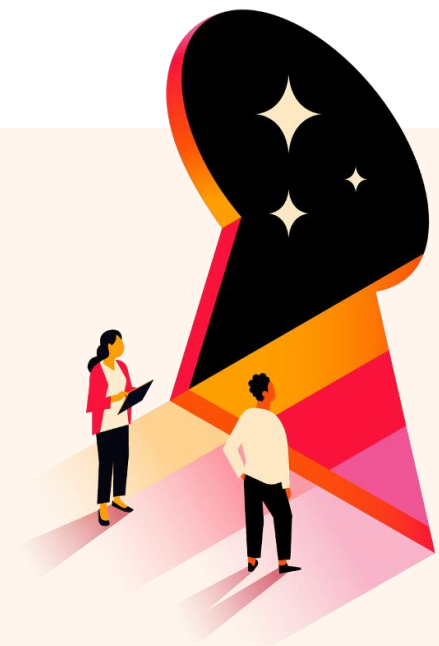
The task for leaders now is to prepare their organisations to be both high-performing and employee-centred – where technology and talent evolve together.

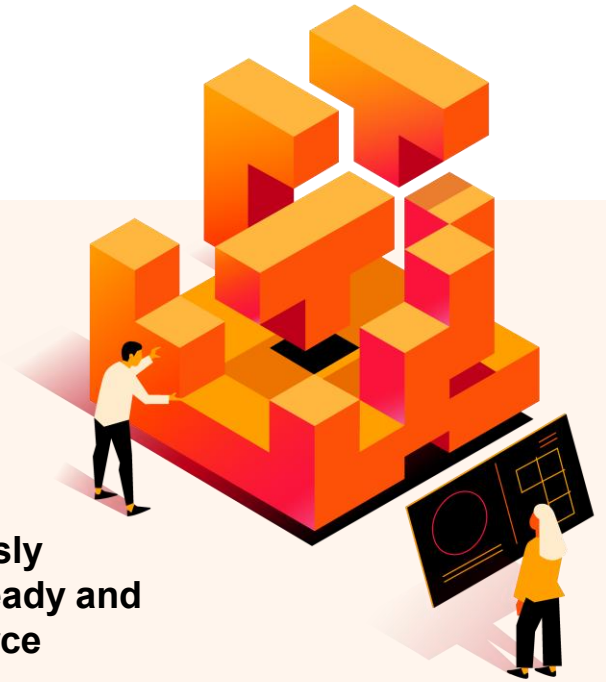
01

Lead with openness about technology's role

As AI and automation continue to redefine work, leaders must communicate with clarity and consistency about where these technologies are being deployed, what will change across processes, how various job roles will be impacted and where new value will be created.

This can be achieved through continuous, two-way communication in the form of town halls, employee satisfaction surveys and regular touchpoints, ensuring employees remain informed, engaged and supported as work evolves. By pairing transparency with regular career conversations and continuous feedback on evolving skill needs, leaders can replace uncertainty around technology with clarity. This helps strengthen perceived job security and gives employees the confidence to adapt, seize new opportunities and grow alongside transformation.





02 Build a continuously evolving, future-ready and skills-first workforce

Leaders need to ensure upskilling, reskilling and capability building move beyond periodic initiatives and become a key element of their organisations' forward-looking business strategy. This means identifying future skill needs early, assessing current capabilities to understand gaps and using those insights to create development pathways tailored to roles, seniority and diverse career trajectories.

Sustained investment in L&D resources will be required, supported by policies that link employee development efforts to performance, recognition and advancement. Leveraging a skills-first approach¹³ to hiring, promotion and internal mobility will solidify upskilling as the basis for how careers advance.

03 Create and nurture a culture of agility and innovation

Leaders must build a culture where employees are encouraged and equipped to adapt quickly to change, experiment with new ideas and improve continuously. This means making learning part of the culture – treating it as an everyday expectation by promoting team-based problem-solving, enabling cross-functional collaboration and even introducing organisation-wide innovation challenges. Together, these practices help ensure that agility and creativity become central to how work gets done.

Recognition and regular feedback can reinforce these behaviours, rewarding experimentation, collaboration and innovative thinking, rather than just tenure or output. Celebrating progress and growth ensures employees feel supported as they embrace new ways of working.



04 Equip managers to champion transformation on the ground

Given the essential role managers play in translating organisational ambition into everyday practice, leaders must ensure that they have the clarity, tools and protected time to coach teams, support skill development and manage workloads in ways that sustain employee engagement and wellbeing.

This can be achieved by setting clear performance expectations for managers around employee development and wellbeing and supporting them with the knowledge and guidance needed to fulfil these responsibilities. Giving managers ownership of the employee experience enables them to spot needs early, steer teams through change and amplify trust across the organisation.

05 Sustain high performance through flexibility, autonomy and balanced intensity

Leaders must prioritise flexibility, autonomy and balanced intensity to sustain high performance, giving employees the freedom, clarity and ability to manage their workloads so that they remain engaged and effective.

This can be done by expanding flexible work arrangements, strengthening autonomy in day-to-day judgement and giving teams a voice in how work gets done. Establishing outcome-based performance expectations and promoting team norms that offer employees the choice in how work is managed, will help maintain focus and prevent fatigue as organisations continue to evolve.

The Middle East's workforce continues to demonstrate a powerful blend of optimism, ambition and adaptability. The challenge now is for leaders to amplify these strengths through vision, transparency and care – ensuring that technology, trust and talent progress together. By nurturing wellbeing, aligning recognition with capability growth and embedding continuous learning across all levels, organisations can turn today's momentum into enduring competitive advantage in the AI-enabled era.



What stands out in the Middle East is a workforce that is both future-ready and confident. People are open to AI, committed to developing new skills and eager to contribute – but they also expect their employers to safeguard their wellbeing and provide job security. The defining challenge for leaders now is to balance rapid technological progress with human care, building cultures that build resilience and long-term opportunity.



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References

Our analysis of the data takes into account regional variations in the demographic and skills profiles of respondents.

1. Based on a comparison of regional and global respondents engaged in office work (e.g., accountant, banker, administrative assistant, civil servant, customer service representative, engineer, lawyer, architect).
2. <https://www.pwc.com/m1/en/value-in-motion/me-vim-english.pdf>
3. <https://fortune.com/2025/09/24/gen-z-fear-ai-jobs-hiring-entry-level-very-concerned/>
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