



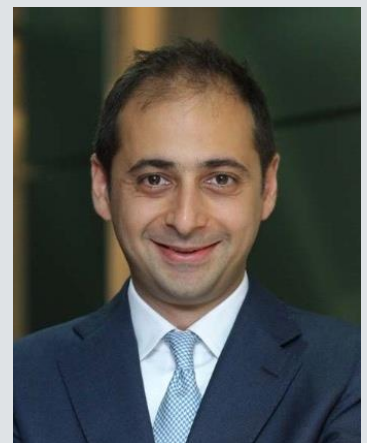
**strategy&**

# Green pays: Sustainable homes command a price premium in Saudi Arabia and the UAE





In the key economies of the Gulf Cooperation Council (GCC), notably in the Kingdom of Saudi Arabia and the United Arab Emirates (UAE), we are witnessing a shift in how housing is perceived. As rapid urban growth and ambitious national visions redefine the real estate landscape, homes are evolving from structures that shelter to ones that sustain and endure. Sustainable housing sits at the heart of this transformation, serving as the cornerstone of resilient cities and diversified economies. Homebuyers are putting real value on sustainability, willing to pay a premium for greener homes – driving a regional growth story built on resilience, responsibility and lasting progress.”



**Dr. Yahya Anouti**

Partner, Strategy&  
PwC Middle East  
Sustainability Leader

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A photograph of a modern, two-story building with a minimalist design. The building features large windows, a balcony with a black metal railing, and a pergola structure. The facade is composed of light-colored concrete and wood paneling. In the foreground, there is a paved area, a low concrete wall, and a garden bed with tall grasses and a small tree. The sky is clear and blue.

01

# Executive summary

# Executive summary

A decisive market shift is underway: Sustainability has moved from a differentiator to a baseline expectation in the GCC housing market. A survey of 2,400 homebuyers in Saudi Arabia and the UAE, led by the Strategy& Middle East Ideation Centre, part of the PwC network, examined consumer preferences for sustainable homes. The research found that buyers are willing to pay an average premium of 7% for homes with eco-friendly features, while conventional homes without them are discounted by around 4%. In other words, some level of sustainability is now priced in, and buyers increasingly assume it as a standard part of modern living.

Willingness to pay rises further by 9.6% with access to green finance indicating how financial inclusion amplifies the demand for future-ready, climate resilient homes.

Buildings account for a third of global emissions and a third of global waste.<sup>1</sup> As populations expand at pace, sustainable housing has become essential to counter the resource depletion and emissions driven by traditional construction. Across the GCC, population growth is placing significant pressure on housing supply. Saudi Arabia's population is projected to rise from around 35 million today<sup>2</sup> to nearly 39 million by 2030,<sup>3</sup> with Riyadh alone expected to grow by 38% to 9.6 million.<sup>4</sup> In the UAE, the population has already surpassed 11.3 million in 2024, with Dubai surpassing 4 million for the first time in 2025.<sup>5</sup> Embedding sustainable design, energy efficiency, and resilient urban planning into new housing development is vital to minimise environmental impact, ensuring long-term liveability.

Built on the principle of better living with lower impact, sustainable homes combine intelligent design, advanced technology and eco-friendly materials to create cleaner, healthier and more efficient living environments. These homes form the foundation for resilient communities and inclusive economic growth.

The objective of this paper is to examine how sustainable housing as a new market norm can accelerate broader economic, social and environmental transformation across the GCC — turning market preference into a catalyst for national progress. As governments advance national sustainability targets and consumers increasingly reward responsible real estate development, the next few years will determine whether sustainability becomes a source of competitive advantage, or merely a compliance obligation.

<sup>1</sup> Emirates News Agency (WAM) 'Emissions from building sector stopped rising for first time since 2020, UN finds, 12 Nov. 2025

<sup>2</sup> Statistics Times, Saudi Arabia Population, StatisticsTimes.com, 2024

<sup>3</sup> GlobalData, The Population of Saudi Arabia, GlobalData.com, 2024

<sup>4</sup> Arab News, 'Riyadh's population to hit 9.6m by 2030, driving demand for 305k new homes :Knight Frank' 25 October 2024

<sup>5</sup> Gulf News, 'UAE Population Hits 11.3 Million in 2024' Gulf News, 2024

# Insights at a glance

**Willingness to pay:** Buyers are willing to pay an average 7% premium for homes that include sustainable features, while homes without them are discounted by around 4%.

01

**Buyer priorities:** The most valued features include energy and resource efficiency, outdoor green spaces, comfort and wellbeing, long-term financial benefits and climate resiliency to withstand extreme events such as flooding and rising temperatures.

02

**Top motivators:** Energy and cost saving (45%), environmental benefits (44%), higher value appreciation (43%), resilience to climate disasters (40%) are among the key motivators driving adoption.

03

**The green finance factor:** Willingness to pay increases significantly by 9.6% with access and a greater level of awareness of green financing options.

04

**Social signalling:** Visible certifications and positive labelling, such as sustainability badges, are effective behavioural nudges to promote adoption and trust.

05

An aerial photograph of a high-end residential community. A dark, winding canal or river flows through the center of the development, bordered by lush greenery and palm trees. Numerous modern, multi-story houses with light-colored facades and terracotta roofs are scattered throughout the area. Some houses have private swimming pools. The layout is organized with winding roads and manicured lawns. In the bottom left corner, a small bridge crosses the canal.

02

The willingness  
to pay

# The willingness to pay

## Green is the new baseline for housing. From a differentiator to an expectation in real estate

As sustainability becomes embedded in the GCC's housing market, green features are now priced into buyer expectations rather than treated as optional add-ons. Homebuyers across Saudi Arabia and the UAE no longer see sustainable features as a luxury or a “nice to have”. They increasingly expect new homes to incorporate sustainable elements such as energy efficiency, green construction and healthier living environments as default options. This shift has created an 11% gap in perceived value between sustainable and conventional homes, underscoring how strongly sustainability now drives purchase decisions. For developers, this marks a critical market inflection point: those who integrate sustainability into their offerings can justify higher prices and strengthen their competitive edge, while those who do not, risk profitable returns as consumer expectations evolve.

Nationals in both the UAE and Saudi Arabia are willing to pay a 9% premium for future-ready sustainable homes – notably higher than the 7% market average. Homes without green features would lose around 7% of their value.

This willingness is also an indicator that in the GCC the decision to purchase sustainable homes is not just an individual preference. It signals the growing influence of national policy momentum, driven by initiatives such as Saudi Vision 2030 and the UAE Net Zero 2050 agenda, which are embedding low-carbon priorities into both consumer behaviour and market expectations across the GCC.



A man wearing a white thobe and a red and white checkered ghutra with a black agal, standing in a modern office with large windows. He is holding a tablet and looking at the screen. The background shows a bright, airy office space with vertical window frames.

03

Drivers shaping  
demand

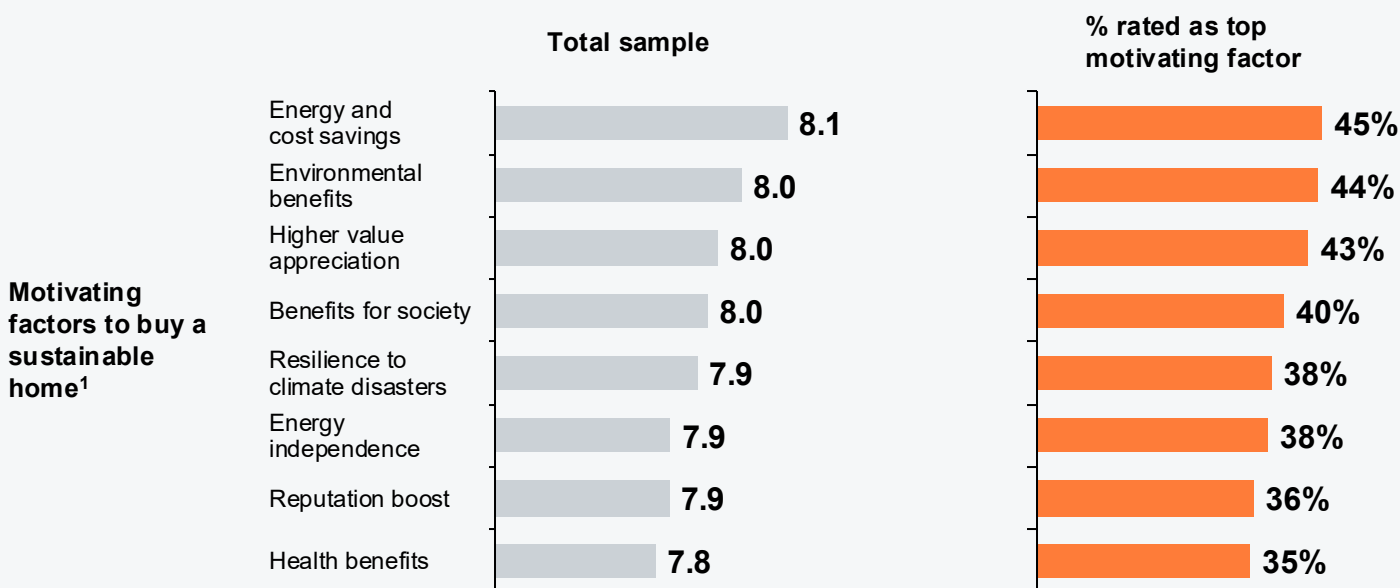
# Drivers shaping demand

## Key motivators behind the GCC homebuyer's shift to green homes

Our findings have shown that the top three factors that motivate consumers to buy sustainable homes would be energy and cost savings, environmental benefits and higher value appreciation. Besides these, resilience to climate disasters and health and wellbeing also play a crucial role.

- 01** | **Energy and cost savings (8.1)<sup>6</sup>** – The single most powerful driver, cited by 45% of respondents as their top reason for purchasing a sustainable home. Efficiency translates directly into lower utility bills, making sustainability a financially rational choice.
- 02** | **Environmental benefits (8.0)** – Nearly as important, 44% of buyers are motivated by the desire to reduce environmental impact, reflecting the growing alignment between personal values and national climate goals.
- 03** | **Higher value appreciation (8.0)** – 43% of consumers we surveyed indicated the growing recognition that sustainable homes not only reduce long-term costs but also deliver stronger asset value and investment returns.
- 04** | **Resilience to climate disasters (7.9)** – Following close and indicated by nearly 40% of buyers who increasingly value homes built to withstand extreme heat or weather events – they view resilience as an assurance of safety, comfort, and long-term asset protection.
- 05** | **Health and wellbeing (7.8)** – About one third of homebuyers surveyed indicated that indoor air quality, access to greenery and overall comfort were strong motivators, showing that sustainability is not only about efficiency but also about better living.

**Figure 1:** Cost savings, environmental benefits and value appreciation are key motivators to buy a sustainable home.



Source: Strategy& analysis

<sup>1</sup>Rate from 0- Not at all to 10- Extremely

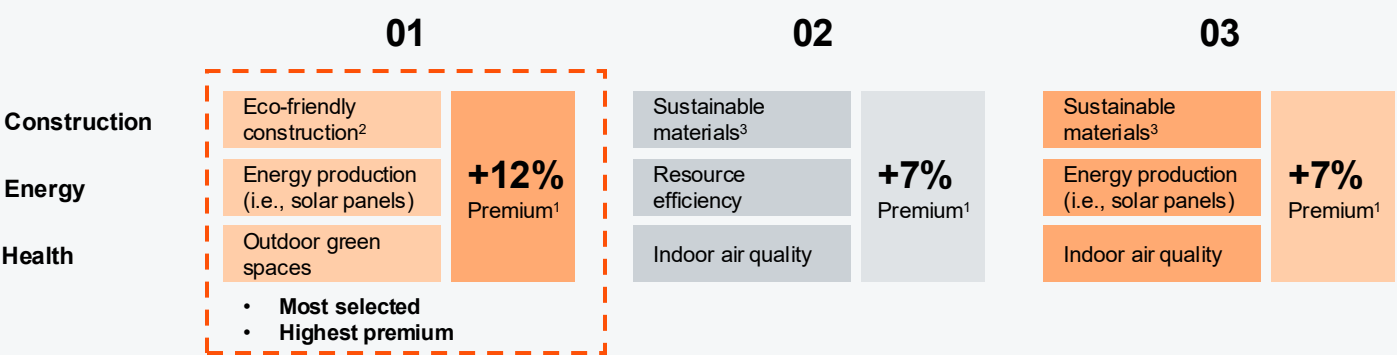
<sup>6</sup> Survey responses have been rated on a scale of 0–10, where 0 indicates 'not at all important' and 10 indicates 'extremely important'

The survey also revealed that consumers place the highest value on green features that deliver visible and experiential benefits to their lifestyle rather than purely technical ones.

**The top-ranked combination of offerings** includes eco-friendly construction, solar energy production and outdoor green spaces, and commands a +12% price premium, the highest across all 27 tested combinations. This indicates that homebuyers are willing to pay significantly more for features that contribute to both environmental impact and personal wellbeing.

**The second and third most preferred combination of offerings** emphasise sustainable materials, indoor air quality, resource efficiency and energy production, attracting moderate yet meaningful +7% premiums. Together, these preferences suggest that while sustainability remains a strong purchasing driver, its perceived value peaks when it is tangible and liveable – solar panels that reduce bills, green spaces that improve physical and mental health and construction methods that signal environmental responsibility.

**Figure 2:** Preferred sustainable combination of offerings.



<sup>1</sup>Premium over the price they expected to pay most likely for a home they like.

<sup>2</sup>Refers to reduction in overall emissions during the construction process (i.e., low emissions machinery, using locally sourced materials);

<sup>3</sup>Refers to the materials used for construction (i.e., recycled materials, green materials).

Source: Strategy& analysis

While these motivators explain ‘why’ homebuyers value low carbon, climate-resilient features, the next question is ‘who’ among them is most willing to pay a premium and what drives that decision. The survey’s behavioural analysis reveals that willingness to pay is not determined by motivation alone, but by a combination of means, mindset and awareness. In other words, while sustainability appeals broadly across the market, certain behavioural and demographic factors amplify the intent to act, turning preference into purchase.

## Financially enabled and values-driven consumers are shaping the market's transition.

The survey identifies four primary drivers that influence how much more consumers are willing to pay for future-ready low-carbon living spaces:

### Access to financing (+9.6%)



Those with access to green mortgage products or dedicated financing options are significantly more willing to invest in green homes. This underscores the need for financial inclusion mechanisms and structured green lending to accelerate market uptake. Our data shows that UAE nationals enjoy the strongest access to green financing options, with 93% reporting availability of tailored loans or mortgages for sustainable homes.

### Lifestyle alignment (+4.8%)



There is a link between healthy lifestyles and willingness to pay for sustainability. People who identify as vegan, vegetarian or physically active show significantly higher willingness to pay for sustainable homes, linking sustainability closely with wellbeing and identity.

### Environmental belief and familiarity (awareness +2.8%, familiarity +2.5%)



Personal conviction in one's ability to impact the environment, combined with familiarity with green-living practices, modestly increases the willingness to pay.





04

Belief vs action

# Belief vs action

## The sustainability adoption gap – what is slowing progress?

While awareness of sustainability continues to grow across the GCC, there remains a gap between belief and action. Survey findings have indicated that many consumers still lack trusted information, an idea of clear certification or visible examples to guide their housing choices. Understanding this relationship between what people know, feel and do is essential to transforming sustainability from an abstract ideal into a mainstream housing priority – one where informed awareness fuels genuine desire and desire translates into demand.

### Resources and opportunity

Across the region, markets are progressing at different stages of maturity – some are beginning to scale sustainable real estate, while others remain in earlier phases where growing awareness must now be matched by tangible, accessible inventory.

The strategic takeaway is clear: expanding green financing and accelerating the availability of green housing options are essential to generate latent demand, particularly in markets where policy direction and financing mechanisms are still taking shape.

**So, here's what banks and financial institutions can do now to address this:**



**Expand** green financing and financial inclusion - develop green mortgage products and low-interest loans for sustainable construction and retrofits.



**Increase** public awareness of available financing and embed prompts in digital real estate platforms.



**Introduce** behavioural nudges (for example, energy savings calculators) to demonstrate tangible benefits.



## The cognitive shift

In Saudi Arabia and the UAE, while many understand the importance of reducing carbon emissions, they are less aware of how individual housing choices contribute to broader sustainability outcomes. This suggests a need to strengthen awareness around the environmental impact of buildings and the role homeowners can play in helping to achieve national climate goals.

At the same time, awareness of formal green home certifications remains limited across the region. Only around a third of respondents could identify a certification such as LEED (Leadership in Energy and Environmental Design) or Estidama, while about half recalled hearing of them without knowing details. This disconnect highlights a lack of trusted proof points or clear benchmarks to distinguish genuinely sustainable properties from general market claims. Building familiarity and trust through standardised certification frameworks and public education will therefore be key to increasing confidence in green housing.

**Here's what governments can do now to help address this:**



**Build** familiarity and trust through certification - standardise and simplify green certification frameworks suited to GCC climates.



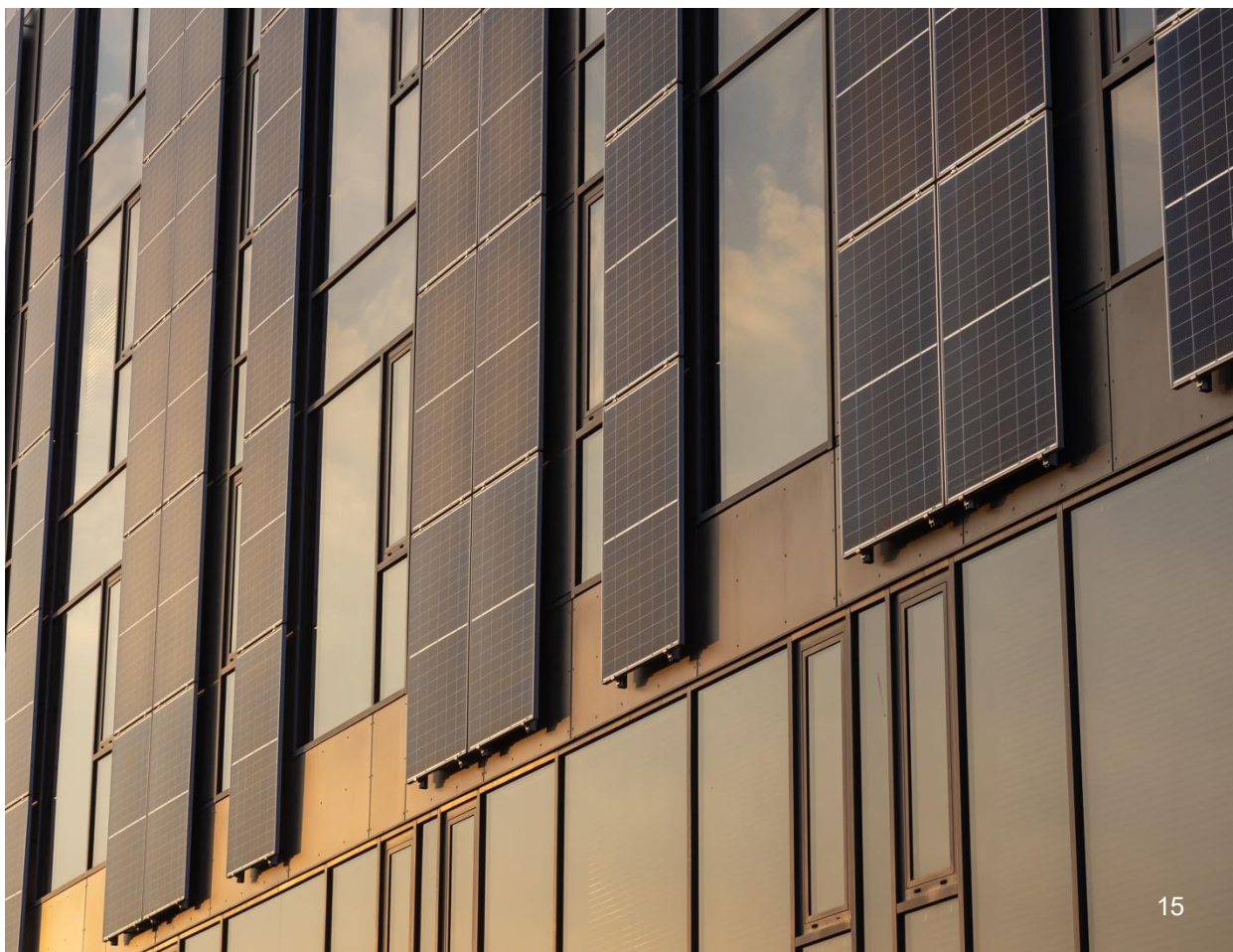
**Communicate** certifications clearly in property listings, sales documents and marketing.



**Leverage** lifestyle and wellness trends – connect climate consciousness to health, wellbeing and modern living through targeted campaigns. Partner with fitness and wellness brands, influencers and community groups to make responsible living aspirational for residents.



**Plan** incentives for eco-friendly initiatives and eco-conscious communities.



## The values opportunity

Beyond awareness and affordability, personal lifestyle alignment is emerging as a key driver of green housing adoption. Data shows that individuals who identify as health conscious, particularly those following vegetarian or vegan diets, or those who spend more time outdoors, exhibit stronger willingness to pay for sustainable homes. For these consumers, sustainability resonates as part of a holistic approach to health, comfort, and modern living.

This presents an opportunity for academia and research institutions to play a pivotal role in shaping long-term awareness and behaviour. They can anchor environmental responsibility in education, research and public discourse – helping to close the knowledge-to-action gap, deepen emotional engagement and accelerate adoption.

**So, here's what academia and research institutions can do now to drive this:**



**Strengthen** awareness - integrate sustainability literacy into school curricula and vocational programmes.



**Plan and host** workshops and awareness programmes about the urban landscape to strengthen environmental responsibility.



**Educate** children on the use of innovative technologies and efficient water and energy management, encouraging eco-friendly practices within their homes and residential communities.



**Advance research and insight generation:** Conduct field studies and data-driven analyses to assess the region's sustainable housing needs and shape future policy decisions.



A blurred background image of three business professionals in an office setting. A man in a dark suit and tie is seated at a table, looking towards the left. Two women are also seated at the table, one on the left and one on the right, both looking towards the man. The office has large windows in the background, letting in bright light. The overall scene is out of focus, emphasizing the text overlay.

05

Visibility is value

# Visibility is value

## A simple badge could nudge consumer home-buying behaviour

Converting intent into action requires more than information – it requires visibility and validation. Consumers need clear, trusted signals that allow them to differentiate genuinely sustainable homes from those that simply claim to be. As part of the survey, a behavioural experiment was conducted to test whether public recognition and positive social signalling can nudge consumer housing preferences and accelerate adoption.

In the experiment, we presented to participants a hypothetical policy in Saudi Arabia or the UAE, requiring sustainable and climate-resilient homes to display a coloured badge indicating their environmental contribution. We then measured the likelihood of buying a sustainable home.

Findings revealed a clear behavioural shift toward positive signalling. Respondents not only showed higher support for such a badge (8.3/10) but also a greater likelihood to buy a sustainable home (8.4/10) under this positive framing.

The experiment demonstrates that making sustainability visible and status-enhancing through badges, certifications, or labelling could strengthen both social legitimacy and individual home purchase intent. It positions sustainability as a symbolic differentiator that appeals to personal identity and community recognition, not merely environmental responsibility.

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### Benefits of a green badge:

01

**For developers:** Visible sustainability labels differentiate offerings in crowded markets, help justify premium pricing and strengthen brand credibility.

02

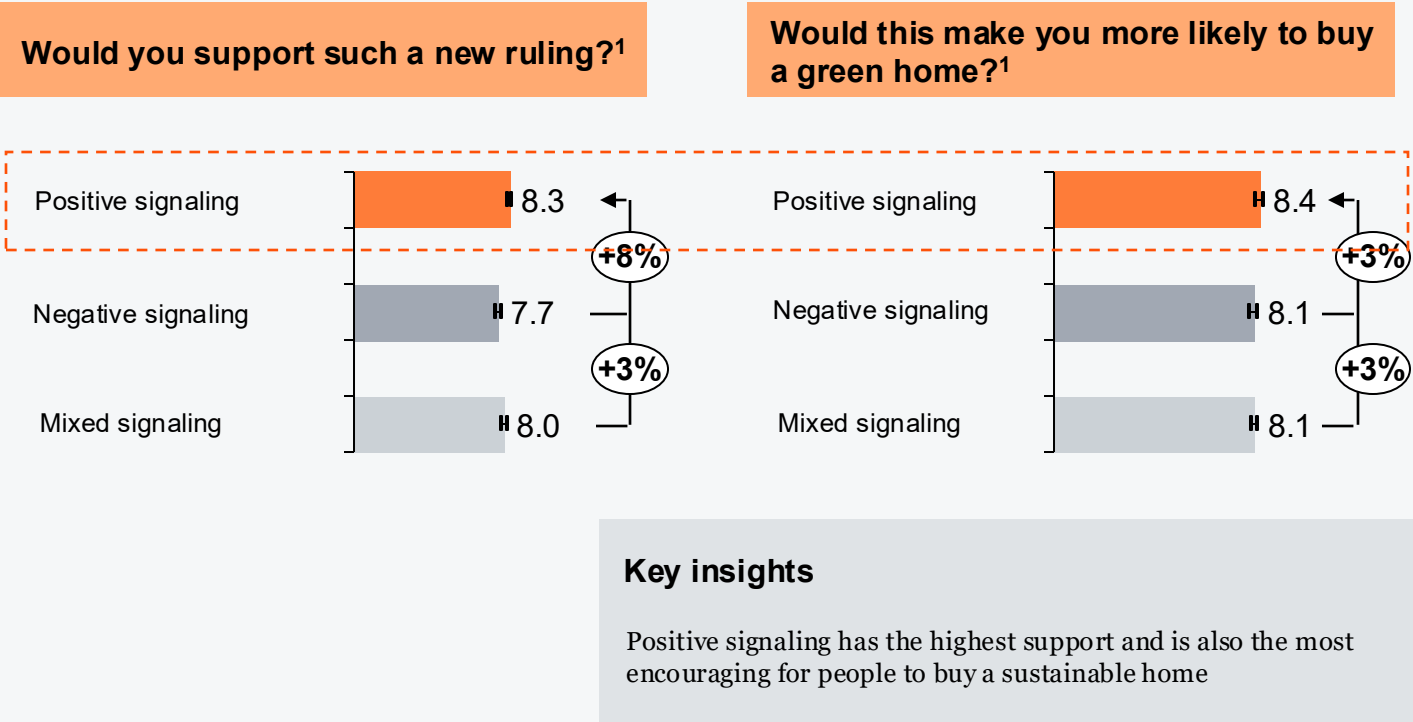
**For governments:** Recognition schemes such as green housing badges can accelerate adoption more effectively than regulation, aligning with Saudi Arabia's Vision 2030 and Dubai's Green Economy Strategy housing ambitions.

03

**For buyers:** Clear, visible green credentials build confidence, reduce information gaps, and make sustainability both a lifestyle choice and a financial value-add.

Our badge experiment found that homebuyers in Saudi Arabia and the UAE were more likely to choose a sustainable home when it displayed a coloured badge showing its environmental contribution.

**Figure 3:** Badge experiment



Source: Strategy& analysis

<sup>1</sup>Rate from 0- Not at all to 10- Extremely



A man in a light blue shirt and dark trousers stands on a wide, stone staircase, looking up towards a clear, bright sky. The staircase is flanked by high, light-colored walls, creating a sense of perspective. The man is positioned in the center of the frame, with his back to the camera.

06

Industry perspective

# Industry perspective

## Commercial real estate tenants lead the shift

Developers we engaged with reported that there is a willingness to pay a premium for green and energy-efficient spaces among commercial real estate tenants. In Saudi Arabia and the UAE, these tenants are now viewing sustainability as a key lever for enhancing asset and brand value, underscoring its shift from a cost consideration to a competitive advantage. Offices that incorporate innovative technologies and sustainable design principles – particularly those achieving higher levels of green certification – command clear rental premiums, as tenants increasingly seek efficient, future-ready workplaces.

### This is largely driven by:



Corporate net-zero and ESG commitments, which make sustainable spaces part of strategic agenda.



Operational cost savings, as energy-efficient buildings reduce long-term running costs.



Brand reputation, as companies increasingly use sustainable real estate to demonstrate leadership and responsibility.

The next phase of growth will depend on bridging these gaps, through better data transparency, financial incentives and industry collaboration, so that sustainability becomes not just an added feature, but a foundational criterion for real estate investment and development across the GCC.



Owning our assets gives us the unique ability to integrate sustainable practices from the ground up. Since 2014, our sustainable building policy has guided every development decision, assessing physical risks and ensuring every project meets the highest environmental standards. All our assets are designed and operated in line with premium green certification standards, and through our pioneering Green Star Rating System, introduced in 2011, we hold every tenant accountable to these principles. Stores scoring below three stars receive tailored guidance to improve, because sustainability is a shared responsibility. Thanks to our visionary leadership who champion these values, we've been able to weave sustainability into every facet of our operations, creating spaces that are not only vibrant but future ready."



**Nazly Asadollahpour**  
VP Sustainability  
**Majid Al Futtaim**



“

At Chalhoub Group, our Net Zero by 2040 commitment reflects our belief that meaningful progress is achieved through collaboration. Sustainability is embedded throughout our retail journey - from thoughtful store design to energy efficiency, waste reduction, and responsible material use. Through the Unity for Change Coalition, we work alongside our partners to integrate shared ESG standards and develop practical tools such as the eco-design guidebook. Together, we're bridging infrastructure gaps, amplifying impact, and driving the retail industry toward a more sustainable and responsible future - while empowering teams and communities through ongoing education and capacity-building.”



**Florence Bulté**  
Chief Sustainability Officer  
**Chalhoub Group**

# Industry perspective

## Developers are adapting but face systemic challenges

While consumers are increasingly aware of the value of green homes when it comes to real estate and housing choices, developers are still navigating how to translate this awareness into viable business models. Understanding their challenges – from cost to supply chain – is key to bridging the gap between demand and delivery.

While sustainable living has evolved from a niche differentiator into a core selling point – especially in new projects – it still tends to come after location and price in buyers' decision-making hierarchy. This means that while it strengthens a project's value proposition, it's not yet the primary purchase driver. In short: sustainability enhances competitiveness, but it doesn't yet determine it.

We engaged with developers across over Saudi Arabia and the UAE through focused interviews, and have identified three structural barriers that limit how far they can embed sustainability in projects:

01

High upfront capital expenditure (CAPEX) and uncertainty around the return on investment. For developers this can be a challenge, as the payback period for sustainable features can be unclear or long.

02

Limited regional data, cost-performance benchmarks and case studies specific to the GCC make it difficult to validate business cases for sustainable development.

03

Supply chain and material constraints, with insufficient availability of certified green materials and specialised suppliers can drive up costs and complicates sourcing.

But even with these challenges, developers recognise immediate, commercially viable green opportunities, particularly in retrofitting and energy-efficiency improvements. Such interventions typically deliver a payback period of three to five years, making them attractive business cases – many developers are now treating these efforts as revenue-generating strategies, integrating energy-saving retrofits and operational efficiency upgrades into their core business models.



There's definitely a growing appetite for sustainable real estate – it's a bigger topic now than ever before, especially with the giga projects in the Kingdom [of Saudi Arabia] leading the conversation. We see differences across the landscape: developers like ROSHN are delivering certified, sustainable communities, while destinations like AlUla focus more on environmental preservation than holistic sustainability. We are pushing forward, tackling emissions reductions and embodying carbon and nature-based solutions. And if international investors began demanding higher sustainability standards when buying in, it would make a huge difference in driving progress across the sector.”



**Julie Alexander**  
Senior Director of Smart  
Cities and Environmental  
Sustainability  
**Diriyah Gate**  
**Development Authority**



07

Looking ahead

# Looking ahead

Developers play a pivotal role in accelerating the transition to houses built more sustainably - and their responses will vary based on ambition, resources, and market maturity. Across the built environment ecosystem, we have identified three distinct developer archetypes:<sup>7</sup> The 'leaders', who set the pace through innovation and scale; the 'pragmatists', who integrate sustainability for competitive and financial gain; and the 'followers', who are smaller and mid-size developers building foundational readiness to participate in the green transition. Here's how they can each work to advance the GCC's shift towards climate-resilient development.



## The leaders: Scaling innovation and setting new standards

01

### 'Leaders' can:

- **Scale through collaboration:** Build cross-sector coalitions to drive R&D in green construction, ensure the availability of sustainable materials and achieve economies of scale.

- **Set regional benchmarks:** Partner with governments to co-create national standards and flagship green housing projects that showcase global best practices.

- **Mobilise finance:** Work with sovereign wealth funds and green financiers to expand access to low-cost, long-term capital for sustainable developments.

- **Demonstrate leadership:** Publish transparent sustainability data and invest in visible certifications to influence peers and strengthen market confidence.



## The pragmatists: Turning sustainability into a business advantage

02

### 'Pragmatists' can:

- **Invest where ROI is clear:** Focus on retrofitting and energy-efficiency upgrades with proven payback periods of three to five years.

- **Leverage financial innovation:** Collaborate with banks to create green financing products and incentive schemes that make the economics of sustainability compelling.

- **Adopt digital enablers:** Use AI, analytics and smart systems to track energy performance, optimise maintenance and reduce operating costs.

- **Align with policy benefits:** Capitalise on tax rebates, procurement advantages, and compliance incentives linked to sustainable practices.

- **Target the corporate segment:** Focus on commercial buyers and tenants, where willingness to pay is highest, driven by ESG commitments, brand reputation and operational savings.

<sup>7</sup> These archetypes reflect different levels of commitment and strategic focus on sustainability



### 'Followers' can:

**Start small:** Begin with simple, low-cost sustainable practices – such as water-efficient fixtures, energy-efficient lighting, and waste management systems.

**Leverage public support:** Tap into government starter incentives, subsidies and compliance toolkits tailored for small and medium-sized enterprises (SMEs).

**Build capacity:** Access training, technical assistance, and awareness programmes offered by regulators and industry bodies.

**Access micro-finance:** Engage with banks offering green SME loans and incremental financing for early-stage sustainability initiatives.

**Collaborate locally:** Partner with municipalities, developers and suppliers to share resources and reduce procurement costs for sustainable materials.

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The transition to sustainable housing in the GCC is no longer a question of 'if', but how fast and how far it can go. Real progress depends on aligning awareness, access and aspiration – and on every part of the ecosystem - from policy to finance to industry - playing its part.

Among developers, our 'Leader' archetype<sup>8</sup> must set the pace through innovation, partnerships and transparency. 'Pragmatists'<sup>9</sup> must turn sustainability into a business advantage through innovation, smart investment and data-driven efficiency. And 'Followers'<sup>10</sup> must build readiness and capacity, laying the groundwork for scale. Together, these actions can turn intent into impact.

Now is the moment for industry, government and finance to act collectively – to make sustainable housing the new market standard, not the exception. The opportunity is clear: build the homes that future generations will thank us for and create a housing market that is resilient, inclusive and prosperous – for people, planet and profit alike.

<sup>8</sup> Leaders: Sustainability is central to the business model and they set the pace through innovation and scale

<sup>9</sup> Pragmatists: They integrate sustainability for competitive and financial gain

<sup>10</sup> Followers: Smaller, potentially more local players who observe and adopt.

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