



Building on the Emiratisation success story

Targeted actions for sustained outcomes



UNITED ARAB EMIRATES
MINISTRY OF HUMAN RESOURCES
& EMIRATISATION



pwc

Foreword



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Emiratisation in the private sector is yielding visible impact; targeted efforts from private sector and policy makers will help sustain this momentum. It is one of the core pillars of the UAE's national vision for growth and long-term prosperity.

Launched in 2021 with a mission to increase the competitiveness of Emirati talent, NAFIS has achieved remarkable success. By 2024, it has enabled over 131,000 Emirati citizens to thrive in the UAE's private sector, exceeding expectations and setting a benchmark for national workforce development.

Our survey conducted in partnership with the Ministry of Human Resources & Emiratisation offers interesting insights. It indicates a shift in the preferences of Emiratis towards the private sector, especially among the youths and females. Emiratis are increasingly recognising the role of the private sector as a driver of employment; and the private sector is being acknowledged for providing opportunities for career growth, workplace flexibility and developing entrepreneurial skills.

Giving back to the country by nurturing Emiratis is not just an opportunity but a responsibility of the private sector - one that reflects our collective commitment to the UAE's bright future. A case in point being PwC Middle East - our "Watani" Programme, launched in 2014, has been delivering on its Emiratisation ambitions by empowering Emirati students, graduates, and job seekers to become future business leaders. The programme offers professional development opportunities, international exposure and access to globally recognised qualifications.

I am hopeful that the insights offered by this study will serve as a compelling evidence to highlight what is working well in driving Emiratisation, and where future initiatives and campaigns should target to catalyse this change.



H.E. Shayma Yousef Alawadhi

Acting Undersecretary of Labour Market Development & Regulation, and Assistant Undersecretary for Communications & International Relations

Ministry of Human Resources and Emiratisation (MoHRE)

As the UAE continues its ambitious journey toward economic diversification and sustainable development under the 'We the UAE 2031' national plan, the integration of Emirati talent into the private sector remains a cornerstone of this transformation.

The UAE labour market has demonstrated a distinguished strength and resilience in 2024, particularly in the area of Emiratisation, reaching unprecedented levels of UAE national participation in the private sector. The NAFIS Programme and its initiatives have been instrumental in driving this progress, playing a key role in advancing the Emiratisation mandate and contributing to its success over the past three years.

The Emiratisation Survey with PwC Middle East reaffirms our commitment to fostering strong partnerships with the private sector. The UAE government and MoHRE are dedicated to nurturing this collaboration as a cornerstone of national development, ensuring that Emiratis are not only integrated into the workforce but thrive in roles that contribute to the nation's prosperity.

The survey has given us an opportunity to deepen our understanding on how to best support both UAE nationals and private sector employers through targeted initiatives and policies. It has also helped shine a light on our next areas of focus, as we seek to maximise opportunities both for graduates and experienced professionals in line with our country's ambitions.

As the UAE forges ahead with its strategic goals for socio-economic development, MoHRE remains at the forefront of this progress. The UAE labour market has undergone remarkable structural changes in recent years, making it one of the most attractive markets globally and drawing attention from professionals and businesses worldwide.

The insights in this report reflect the promising future that lies ahead, showcasing the fruitful outcomes of our collective efforts and our enduring commitment to the success of the UAE.



Emiratisation Survey

A lot can happen in 18 months. Between the Emiratisation Survey released in the summer of 2023 and our new, larger-scale survey in January 2025, the United Arab Emirates' private sector has made tangible progress in recruiting homegrown talent, demonstrating that targeted initiatives set out as part of the Government's 'We the UAE 2031' roadmap can and do bear fruit.

Indeed, by 2024 the number of Emirati citizens working in the UAE's private sector had reached 131,000 – well above the target of at least 75,000 set for 2026, the roadmap's halfway point. This success owes much to the UAE's NAFIS programme, introduced in 2021 with a mission aimed at increasing the competitiveness of Emirati human resources and empowering them to occupy jobs in the private sector, this initiative mandates a 2% annual increase for skilled jobs in the private sector and to achieve a minimum of 10% increase by 2026. The highly regarded programme operates under the Emirati Talent Competitiveness Council, chaired by His Highness Sheikh Mansour bin Zayed Al Nahyan, the UAE's Vice President, Deputy Prime Minister and Chairman of the Presidential Court.



While there is still work to be done, the scale and pace of progress is highly encouraging.

PwC's Emiratisation Survey, this time conducted in partnership with **the Ministry of Human Resources & Emiratisation (MoHRE)**, examines the impact of recent measures to boost Emirati representation in the private sector workforce, and charts the progress over the 18 months since our 2023 survey. The survey brings together the views of more than 2,000 Emiratis working in the public and private sectors, as well as job seekers. The results indicate a clear growing interest in private sector opportunities, particularly among younger Emiratis.

As well as exploring the tangible impact of existing initiatives, the findings identify some remaining challenges, pointing to scope for new interventions to ensure that Emirati graduates continue to choose the private sector. Proactive next measures will ensure that the positive progress achieved so far keeps its momentum, and that the return on existing investments is sustained.





Transforming the UAE economy from the inside

The Government's 'We the UAE 2031' national plan sets out the UAE's transformation into a sustainable, digital and knowledge-based economy, requiring innovation and new skill sets.



The private sector has a key role to play in delivering this diversification and growth, and the UAE government is supporting companies with a series of targeted incentives and support initiatives for employers, graduates and job seekers under the NAFIS programme. As well as bringing together a wealth of resources, support, and opportunities for partnership and networking, NAFIS provides a job search platform, offering easy visibility over the available openings in the private sector for graduates, job seekers, private and public sector workers.

But how well are these measures being embraced and used?

The progress towards increasing Emirati employment in the private sector is encouraging, but are all Emirates and regions seeing similar levels of engagement? Additionally, are the recent recruits inclined to build long-term careers in the private sector, or do challenges remain that could affect retention and sustained growth?

To determine the level of sustained progress, and to identify any additional areas for improvement, we expanded the scale of the Emiratisation Survey this year. In 2023, we surveyed 500 Emiratis (working across the public and private sectors, and new graduates entering the workplace) for their perceptions and plans. Eighteen months on, our research has spanned 2,213 respondents across Abu Dhabi, Dubai and Sharjah and the Northern Emirates. The group comprised Emiratis working in the public sector, those currently employed in the private sector, and Emirati job seekers. Private-sector employees made up roughly half of the sample.



Early successes

The signs that the NAFIS programme, and specific initiatives within it, are working are very clear. The original goal - to attract at least 75,000 Emiratis into private sector employment (an increase of at least 15,000 employees, or 2%, annually) by 2026 – has already been surpassed.

Growing awareness of the opportunities in the private sector is helping here. In this year's survey, two-thirds of Emirati job seeker respondents said they believe it is easier to find a job in the private sector than in the public sector. These results reflect a transformative shift in labour market dynamics among UAE nationals who are increasingly recognising the private sector as a key driver for employment - an emerging trend that could reshape the future balance between public and private sector workforce distribution.

Figure 1: It is easier to find a job in the private sector compared to the public sector

Agree

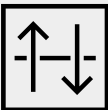
67%

Disagree

33%

Currently, job seekers from Abu Dhabi exhibit the highest confidence that it is easier to find a job in the private sector than in the public sector (70% of those based in Abu Dhabi express this compared to 59% of those in Dubai). In addition, two-thirds (66%) of female job seekers expect that finding a job in the private sector is easier.





Of all respondents currently employed in the public sector, more than half (54%) say that they would be open to a move to the private sector.

Those employed in mid-level public sector positions were particularly receptive to the idea of a private sector move. Additionally, a higher proportion of female public sector respondents express a willingness to make the switch to private sector roles.

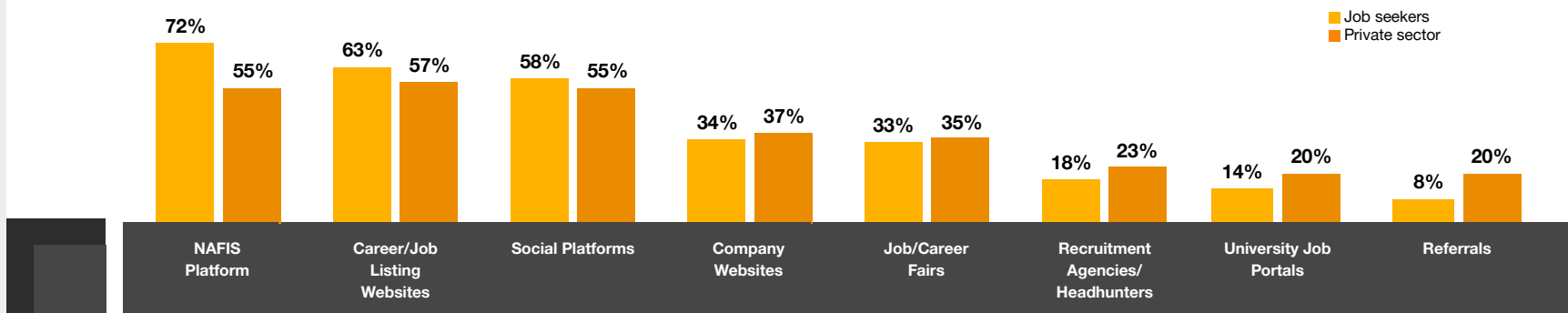
These findings suggest that these groups are keen to explore, upskill and contribute to the private sector, seeing it as an attractive working environment - one that is clearly important to achieve the UAE ambitions, and representing a route to new career opportunities.

NAFIS is driving more than just awareness and access to private sector job opportunities. Since its launch, the NAFIS programme has effectively empowered Emirati talent through targeted programmes and financial incentives. In this year's survey, financial support and recruitment support were cited as the most helpful NAFIS programmes for transitioning into the private sector. While Emirati respondents employed in the private sector and job seekers appreciate the financial support available, those currently employed in the public sector find recruitment support to be the most valuable as they explore opportunities within the private sector.

Private sector and job seeker respondents rank the NAFIS job search platform, job listing websites, and social media platforms as the three most effective methods when looking for a job, with almost two-thirds (72%) of job seekers considering NAFIS the most effective platform, underscoring the NAFIS portal success in establishing itself as a trusted and impactful tool for connecting Emiratis with employment opportunities.

Overall, this is a strong endorsement of this national employment and career development portal.

Figure 2: Which methods would you say are the most effective when looking for a job?





Trends, anomalies and exceptions

The picture unfolding is a largely positive one, demonstrating that Government efforts so far are having the desired impact in stimulating interest in and take-up of jobs in the private sector. This is true for both graduating students and for those currently in public sector roles – particularly among certain cohorts.



So, what is influencing evolving preferences, and how does this vary by demographic ?

What is driving job and sector change?

Among active job seekers, **compensation, opportunities for career growth and progression, and the actual content of the work**, make up the top three factors driving respondents to pursue a specific job opportunity.

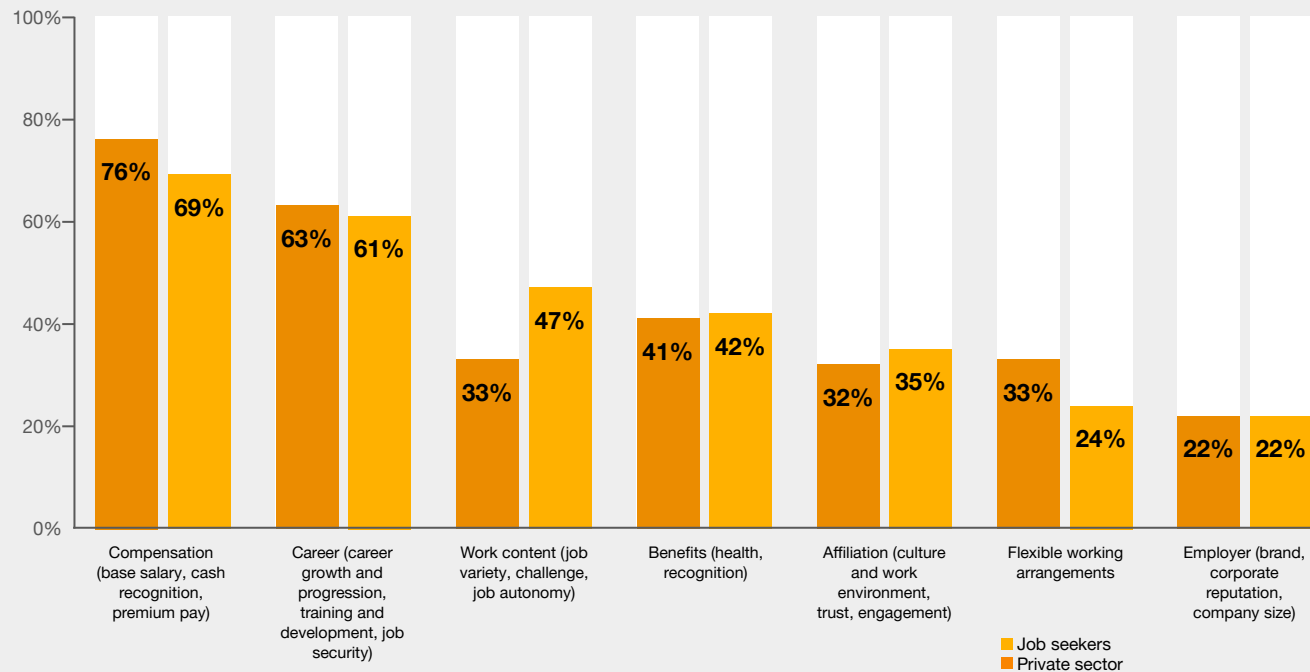
Financial compensation is a key priority for job seekers, with a strong emphasis on securing competitive pay when evaluating potential job opportunities. A significant portion of job seekers, including more than half of the survey respondents under 25, consider financial remuneration as one of their top three priorities.

For younger job seekers, other priorities emerge, as might be expected for those at more formative points in their working lives. **Career development factors** (growth, progression and training, for example) feature more commonly for younger job seekers. The relative importance of these factors gradually declines as employees age, confirming that younger individuals are generally more focused on advancing their careers, while older employees are more concerned with job security and maintaining their income level.

Job security (and by implication continuity in the level of financial compensation) also matters to this year's cohort. The majority of more senior Emirati public sector respondents are hesitant about making a change at this point. This indicates an opportunity for private sector employers to target initiatives at this demographic, emphasising the benefits on offer to valued, senior candidates looking for a later-stage career move, which may involve expert or advisory roles in the private sector.

Among those already working in the private sector, the primary motivators when going after a particular job are financial, followed by career development factors.

Figure 3: Which of the following factors do you believe has the greatest influence on your choice to pursue specific employment?



What are the working preferences?

In terms of working terms and conditions, three-quarters of respondents among all Emirati job seekers and Emirati private sector respondents 'strongly' prefer jobs with flexible working hours and arrangements, up from 45% in 2023. Flexibility and work-life balance, benefits that are often leveraged in the private sector as part of carefully constructed employee value propositions to attract sought-after talent - are attractive particularly to younger employees, and to women.

Certainly, a supportive work environment is crucial for job retention in the private sector. Breaking down private sector responses to the 2024 survey, a supportive work environment (cited by 22%), employee benefits (20%) and growth opportunities (15%) emerge as the most significant factors for staying in a job, even surpassing the prospects for long-term career advancement - as long as the employer is financially stable. Diversity, equity and inclusion feed into this. The diversity in the private sector contributes to a supportive environment where Emiratis feel empowered, integrated and able to thrive.





Building on progress

While the impact of current initiatives is significant, and they are making good headway in attracting Emirati talent to the private sector, there remain certain cohorts that are missing out on the available opportunities. There are also still groups within the private sector who would consider transitioning to the public sector. This underscores the need for private sector organisations to continue investing into the retention of Emirati talent.

Considering that the public sector is perceived to offer better job security, support for flexible working, family-friendly policies, and others, means that the private sector employers need to enhance their employee value propositions, or highlight favourable terms more prominently in their outreach and engagement programmes.

The good news is that almost seven out of 10 (69%) Emirati respondents who currently work in the public sector and are considering a change to the private sector, have prior experience of working in the private sector. In other words, they have tasted both and are making an informed choice for their future.

The survey results showing that older employees - typically those with the most work experience and in senior roles - rate stability, financial security, and broader benefits as motivators to pursue new opportunities, is important information, too. Where private sector employers seek experienced managerial talent with strong qualifications, matching the benefits of the public sector may not always be feasible. The private sector, however, may be able to offer these benefits to some degree, combining them with greater flexibility to provide personalised benefits that could make transitioning from the public sector a more attractive option.

In terms of connecting potential employees with new opportunities in the private sector, there is progress to be made geographically. Survey respondents from Abu Dhabi exhibit the highest confidence in private sector job availability compared to those in other emirates.

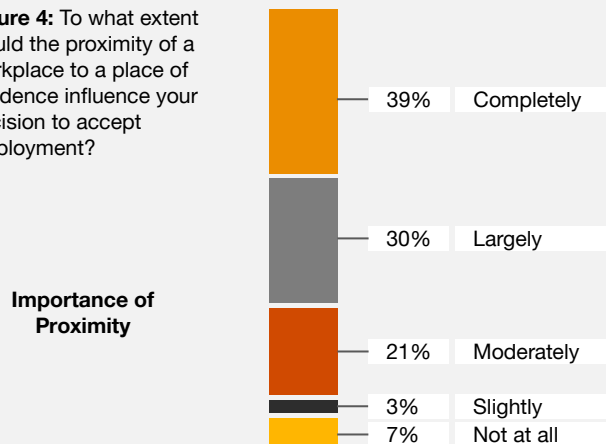
Respondents in Sharjah and Northern Emirates are more likely to value online channels such as the NAFIS job search platform to connect with opportunities more than the respondents in Dubai. The 2024 survey confirms that in Dubai, job listing websites account for nearly as many job searches as social channels (both cited by more than 60% of Dubai-based respondents), followed by company websites (on a par with NAFIS use, accounting for just 49% of searches). This presents an opportunity for Dubai-based companies to expand the usage of NAFIS platform for job vacancy listing source in targeting Emirati talent. By doing so, they can significantly expand their reach and increase the likelihood of finding the right candidate.

The finding that female cohorts see particular opportunity in the private sector could also be capitalised on further. Traditionally, where the public sector might have seemed a more conducive environment for those looking to raise a family (given options to work more flexibly around those commitments, in addition to perceived job security and attractive benefits), today the private sector is also increasingly seen to be an environment in which women can thrive.

In the 2024 survey, almost two-thirds (62%) of female Emiratis working in the private sector said they had equal opportunities for advancement in their current place of employment – a perception which is steadily increasing and reflects a broader cultural shift toward gender parity, with Emirati women actively pursuing leadership and advancement opportunities.

Again, this is messaging that could be harnessed proactively in future campaigns, for instance as private sector recruitment efforts among Emiratis are ramped up. Flexible and remote working practices, meanwhile, could be used to entice Emiratis located outside of the main commerce hubs. In all Emirates, a majority of both job seekers and private sector employees consider workplace proximity to be a significant factor in their decision to accept employment.

Figure 4: To what extent would the proximity of a workplace to a place of residence influence your decision to accept employment?



Proximity and flexibility: PwC Middle East's Assurance Delivery Centre in Al Ain

In 2024, PwC Middle East opened an Assurance Delivery Centre in Al Ain, Abu Dhabi, led by Emirati women, demonstrating the firm's commitment to fostering homegrown talent in the region and promoting diversity.

Workplace proximity and flexibility is particularly important for female Emiratis – the survey shows that 91% of women prefer jobs with flexible arrangements, compared with 82% of men.

The Al Ain initiative not only supports professional growth, it also underscores how companies that prioritise flexibility and location-based solutions are better positioned to attract and retain Emirati women, addressing their specific preferences and encouraging greater participation in the labour market.

Spotlight on skills, training and entrepreneurialism

A further improvement opportunity identified in the 2024 survey is in the perceived value of NAFIS-based training support for job seekers, particularly given the clear demand for personal development, greater skills relevance, and career progression across most demographics (and the imperative for upskilling and reskilling to achieve the UAE's ambitions for economic growth). Currently, the take-up and the perceived value of NAFIS-enabled training can be improved, compared to the recognition of the financial and recruitment support on offer.

This opens doors for new possibilities, given that **74%** of job seeker and private sector respondents strongly acknowledge the importance of skills development and training for employability, which has a bearing on both the positions they take on and how long they stay in them.

These opportunities also transcend age and life stage, despite the prioritisation of job security and a steady income later in life. Indeed, the 2024 survey confirms that career satisfaction and job fulfilment do feature again for older employees, after a dip in middle age. Concerns about 'staying relevant', or a desire to relaunch careers and embark on new challenges, are likely to be behind a growing later-stage interest in skills development. Although the UAE workforce is relatively young, creating pathways for all age groups over time is essential as part of a sustainable growth strategy.

There is also strong evidence of significant interest in developing entrepreneurial skills, with Emirati respondents in the private sector showing the highest enthusiasm (75%), followed by Emirati job seekers (71%). This trend was also observed in last year's survey, suggesting it is a consistent priority. To fulfil the UAE's ambitious targets for economic growth from new industries, the role of entrepreneurs and new-business starters will be essential, alongside existing private enterprises.

Being an agile and ambitious environment, the private sector is an ideal setting for fostering entrepreneurial skills, adding to its appeal for aspiring Emirati job seekers and innovators. NAFIS and existing private sector employers have an opportunity to play a pivotal role here, both in developing entrepreneurial skills and in proactively incubating future Emirati entrepreneurs, in collaboration with key stakeholders.



Takeaways for private sector and policymakers

The private sector will play a greater role in employment of Emiratis is a foregone conclusion – it is a prerequisite to augment the productivity of the national workforce as well as to maintain a lean public sector. It is commendable that the number of Emiratis working in the UAE's private sector has already exceeded the ambitious target set for 2026.

Drawing on the 2024 survey findings, we have identified a series of targeted recommendations both for private sector employers and policymakers, as they look to maintain and build on the momentum:

- 01. Deepen engagement with the youth and females**
- 02. Develop employment propositions that click**
- 03. Sync up on skills**
- 04. Shape policies that catalyse change**



01 Deepen engagement with the youth and females

An effective partnership from the private sector is essential for harnessing the potential of young Emirati talent. The private sector will reap rewards from building a strong pipeline of young Emirati talent. Younger Emiratis demonstrate a greater interest in joining the private sector. There is a natural congruence in youths' desires from their career and what the private sector has to offer.

Considerations for action:

Youth-oriented career development programmes:

Establish initiatives aimed at identifying and nurturing potential candidates through structured graduate programmes, internship, and mentorship opportunities.

01

Career guidance in educational institutions:

Partner with career services of educational institutions to embed industry exposure programmes and foster collaborations through job fairs and recruitment events.

02

Entrepreneurial ecosystems for youth:

Establish innovation hubs within universities, provide mentorship for entrepreneurial Emiratis.

03

Networking platforms for women, role modelling and storytelling:

Host career events and forums to encourage networking and showcase role models within the private sector.

04

Targeted employment programmes across regions and specifically, remote areas:

Address regional variances by tailoring outreach programmes to underrepresented areas.

05

02 Develop employment propositions that click

The private sector has an advantage when it comes to the ability to hone their appeal to Emirati talent. In addition, private sector entities can be nimble footed in adapting their propositions to the evolving expectations of the workforce.

Considerations for action:

Flexible work patterns for young talent:

Promote flexible work patterns to attract younger talent balancing study and work as well as cater to employees with different career objectives and desired pace of growth.

01

Women in leadership:

Promote female participation in leadership roles. Implement family-friendly policies, including parental leave and childcare support.

02

Entrepreneurship:

Encourage entrepreneurial initiatives within the private sector entities, including opportunities for funding, and network of entrepreneurs to tap into.

03

Proposition for experienced boomerangs:

Create transition programmes for experienced public sector employees, offering pension portability and suitable expert roles.

04

Development of transversal skills:

Launch private sector programmes to build global citizenship, leadership, critical thinking, and problem-solving skills through cross-functional training, mentorship, and project-based learning, fostering adaptability and career growth.

05

03 Sync up on skills

Developing skills is everyone's ownership. The survey responses indicate a need for the learning and development offerings to be more informed by the needs of the private sector. Upskilling has also emerged as a retention driver in the private sector.

Considerations for action:

Sector skills framework and skills intelligence platform:

Build a sector skills taxonomy, aligning skills requirements with private sector demand. With an increasingly large volume of data at disposal of sector skills councils and their ability to scan data across UAE career sites and job portals, there is an opportunity to forecast labour market trends and identify emerging skill demands.

01

Employer-led academies and specialised future skills academies:

Establish industry-specific training academies through public-private partnerships, focusing on future-facing sectors like technology, sustainability, and advanced manufacturing. Provide incentives and easy access to the academies.

02

Micro-credentials, MOOCs, alternate training delivery channels:

Offer micro-credentials for Emirati talent and utilise MOOCs (Massive Open Online Courses) and virtual delivery channels to deliver training at pace and at scale.

03

Reskilling for senior professionals transitioning to private sector:

Collaborate on launching specialised programmes for senior Emiratis transitioning to the private sector, focusing on leadership, digital proficiency, commercial acumen.

04

04 Shape policies that catalyse change

Enabling private sector employment for Emiratis requires a decisive policy response with a combination of incentives, quotas, levies, and other policy tools; and even more importantly shaping social norms on private sector employment through engaging families and communities.

Considerations for action:

Targeted productivity incentives for priority sectors:

Introduce specialised incentives for productivity enhancement for priority sectors, including funding productivity improvement innovations and technology adoption.

01

Integrated workforce mobility policies:

Implement policies that ease transitions between public and private sectors, such as pension portability.

02

Diversity on Boards:

Encourage private sector boards to include Emirati members to enhance local perspectives, drive inclusive decision-making, and drive workforce nationalisation further.

03

Social norms shaping:

Shape the social norms around private sector employment through behavioural insights to create a national narrative that highlights the critical role of the private sector in nation-building. Showcase private sector role-models to create a sustainable shift in attitudes and ensure a pipeline of Emirati talent.

04



About the survey

Emiratisation survey 2024 was conducted across three target groups, including Emiratis working in the **public sector, private sector** and **job-seekers**, covering a total of **2,213 respondents**

	Public Sector	Private Sector	Job seekers
Sample size	371	1049	793
Gender	Male: 212 Female: 159	Male: 207 Female: 842	Male: 126 Female: 667
Emirate	Dubai: 174 Abu Dhabi: 143 Northern Emirates: 54	Dubai: 374 Abu Dhabi: 421 Northern Emirates: 254	Dubai: 35 Abu Dhabi: 410 Northern Emirates: 348
Education	Secondary school: 1 Vocational college education: 3 University first degree (Bachelors): 194 University higher degree (Masters): 134 Professional higher education: 39	Secondary school: 57 Vocational college education: 5 University first degree (Bachelors): 865 University higher degree (Masters): 111 Professional higher education: 11	Secondary school: 375 Vocational college education: 38 University first degree (Bachelors): 347 University higher degree (Masters): 23 Professional higher education: 10



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