



# Middle East Human Capital Trends 2025

# New tech. New work.

## Your old value case is not enough

**In a radically changing tech and work environment, organizations need a new calculus to select, plan, assess, and achieve value from their work and workforce tech investments**

*Saly Wehbe*

### **A new era of investment: Why old models fall short**

Our research underscores a fundamental shift: traditional technology investment strategies—once centered on automation and cost-efficiency—are no longer enough. Emerging technologies now promise not only to streamline tasks but to augment human capability and redefine how work gets done.

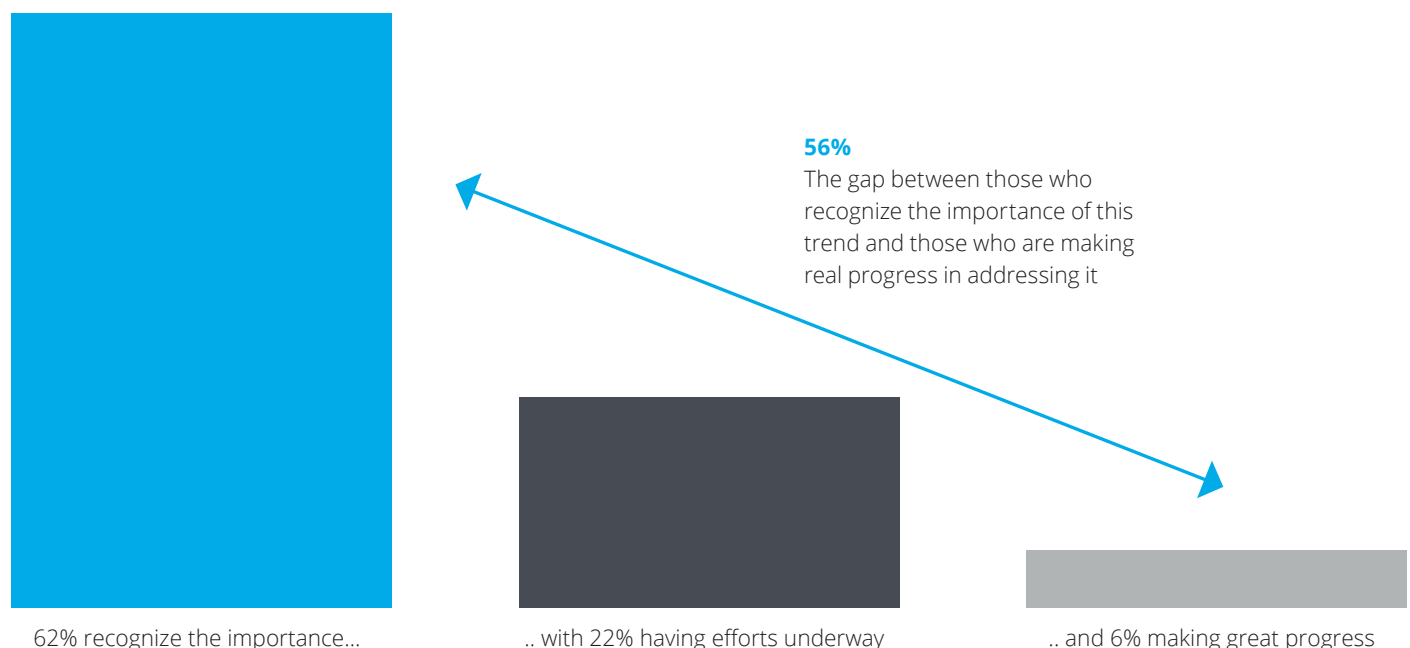
Organizations face an explosion of choice—hundreds of technologies, each offering distinct potential. In this environment, conventional ROI metrics fall short. Leaders must now ask different questions: Which technologies empower the workforce to do more, faster? Which elevate experience, resilience, and performance?

Answering these calls requires a new value case—one rooted in both human and business outcomes. That means not just adopting technology, but adopting a new approach to evaluating and governing it: one that mirrors the agility of R&D, co-creates with stakeholders (including employees), and uses metrics that reflect how people feel, adapt, and thrive alongside tech.

Yet the gap between awareness and action is stark. While 62% of survey respondents recognize the urgency of this trend, only 6% report meaningful progress in addressing it. For organizations to unlock the full value of workforce technologies, a new mindset must take root—one that centers humans in the design, deployment, and measurement of tech.

### **Organizations say it is important to organize and orchestrate technology in a world where traditional boundaries are disappearing, but few are making great progress**

Percentage of respondents answering the questions: "How important is organizing and orchestrating technology in a world where traditional boundaries are disappearing?" and "Where is your organization on its journey to address this issue?"



Source: Analysis of Deloitte's 2025 Global Human Capital Trends survey data.

### Finding value in work and workforce technology

As organizations across the GCC region embrace this new investment logic, several key focus areas are emerging—challenges and priorities that shape the success of modern technology integration:

- **Complexity in technology choices:** Today's leaders face a maze of options. Treating technology investments like R&D projects allows organizations to experiment, fail fast, and scale what works. This portfolio mindset enables strategic risk-taking, encourages cross-pollination across functions, and focuses capital on long-term value creation—not just short-term gains.
- **Outdated ROI metrics:** Efficiency is still relevant, but it is no longer the only story. Organizations must create new measurement frameworks that include innovation potential, employee engagement, digital adoption rates, and even well-being. For instance, tracking how technology enables decision-making autonomy or supports remote collaboration can surface hidden sources of value.
- **Integration across functions:** Too often, technology is implemented by a single team without broad input. A more effective approach invites cross-functional collaboration early in the process—from IT and HR to finance and frontline staff. Co-creating value cases ensures alignment between workforce needs and business strategy, increasing uptake and long-term success.
- **Unclear time horizons:** Many technologies require iterative refinement before their full impact is felt. By applying agile product management principles, organizations can continuously gather user feedback, adjust functionality, and roll out improvements that meet evolving expectations. This approach fosters adaptability and builds trust with end users.

### Ambition meets action

This shift is particularly salient in the Gulf region. GCC countries are accelerating toward digital transformation, investing in emerging technologies not just to increase operational capacity but to future-proof human capital. From utilities and energy to banking and aviation, leading organizations are embracing a more holistic approach—where business value and workforce enablement are treated as interdependent goals.

The approaches illustrated in the following examples demonstrate how organizations can evolve their investment logic, integrate human-centric metrics, and reshape how value is defined in practice.

### Redefining metrics

Dubai Electricity and Water Authority (DEWA) has moved beyond traditional tech KPIs by designing new metrics that reflect both operational outcomes and human impact<sup>2</sup>.

In 2023, DEWA deployed a smart grid system that leverages IoT, AI, and machine learning to enhance energy efficiency. But the transformation wasn't limited to systems alone—it also aimed to boost employee engagement. By tracking changes in productivity and satisfaction, DEWA uncovered that the grid not only reduced energy use by 15% but increased employee productivity by 10%<sup>2</sup>.

The takeaway: when investments are assessed through a broader lens, encompassing both technical and human gains, organizations uncover value others might miss<sup>2</sup>.

### AI-driven insight

Saudi Aramco's AI-powered predictive maintenance initiative, launched in 2024, illustrates how advanced analytics can streamline operations and ease employee burden<sup>3,4</sup>.

By anticipating equipment failures in real time, the company cut downtime by 40% and slashed maintenance costs by 25%. AI-enhanced decision tools also helped managers make faster, better-informed choices—boosting operational efficiency by 15%<sup>3,4</sup>.

This shift not only delivered cost benefits but also improved worker experience by removing the stress of reactive crisis management and allowing employees to focus on higher-value contributions<sup>3,4</sup>.



### Agile by design

Facing rapid digital disruption, Emirates NBD reimagined its product development process through agile methodologies<sup>5</sup>.

In 2023, the bank adopted iterative cycles and real-time customer feedback to revamp its mobile banking services. The results were swift: a 30% reduction in service delivery time and a 25% rise in user satisfaction<sup>5</sup>.

Agile product management allowed the bank to stay in lockstep with customer needs—while also empowering employees to experiment, iterate, and innovate with greater autonomy<sup>5</sup>.

### Conclusion: Rebuilding the case for technology with people at the center

Across the GCC and beyond, the future of work is being shaped by those willing to rethink how they define value.

No longer is tech adoption simply about efficiency or automation. It is about crafting systems that augment human capability, enable strategic growth, and make work better—not just faster. These approaches underscore what becomes possible when organizations treat human outcomes as essential drivers of ROI—unlocking not only performance gains, but deeper engagement and resilience.

To meet the moment, organizations must:

- View technology as a long-term enabler of workforce potential, not just a tactical fix.
- Measure success not just in outputs, but in how people experience and engage with the systems that support them.
- Center inclusion, trust, and flexibility in how technology is governed and applied.

The organizations that succeed will be those that align tech investment with their people strategy—unlocking not only greater productivity, but deeper innovation, stronger loyalty, and more resilient cultures.

The future of value is not built on machines or metrics alone—it is built on the people who use them, and the organizations that empower them to thrive.

### Research methodology

The survey for the Deloitte 2025 Global Human Capital Trends report polled nearly 10,000 business and human resources leaders across many industries and sectors in 93 countries, including across the Middle East region. In addition to the broad, global survey that provides the foundational data for the Global Human Capital Trends report, Deloitte supplemented its research this year with worker-, manager- and executive-specific surveys to uncover where there may be gaps between leader and manager perception and worker realities. The survey data is complemented by more than 25 interviews with executives from some of today's leading organizations. These insights helped shape the trends in this report.

# Endnotes

<sup>1</sup> Deloitte (2025), Global Human Capital Trends Survey.

<sup>2</sup> DEWA (2024), Smart Grid Implementation Report.  
<https://www.dewa.gov.ae/en/about-us/strategic-initiatives/smart-grid>

<sup>3</sup> Saudi Aramco (2024), AI-Powered Predictive Maintenance.  
<https://www.aramco.com/en/news-media/news/2024/aramco-unveils-new-initiatives-to-drive-digital-development>

<sup>4</sup> Saudi Aramco (2024), Operational Efficiency Report 2024.  
<https://www.aramco.com/-/media/publications/corporate-reports/annual-reports/saudi-aramco-ara-2024-english.pdf>

<sup>5</sup> Emirates NBD (2023), Annual Report 2023.  
[https://www.emiratesnbd.com/-/media/enbd/files/investor-relations/financial-information/annual-reports/emiratesnbd-annualreport\\_2023.pdf](https://www.emiratesnbd.com/-/media/enbd/files/investor-relations/financial-information/annual-reports/emiratesnbd-annualreport_2023.pdf)

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