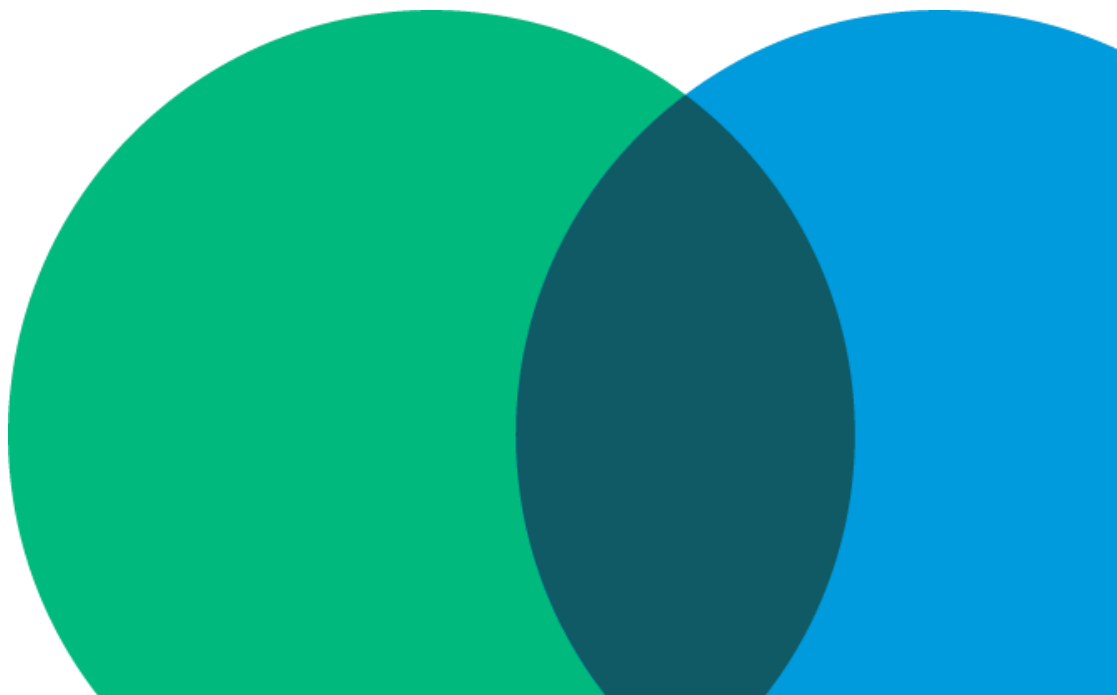


GULF

EMPLOYMENT

INDEX

Quarter three 2025 employment
market review



Making connections

Securing the right talent is paramount to the success of any organisation, and in today's competitive landscape, the race to attract the top talent has never been as fierce

To successfully navigate this world, you need a partner who understands the unique challenges your business faces, has an enviable track record and is adept at making the right connections with the right people.

At Cooper Fitch, we are experts in finding future leaders and building talented teams that drive change.



Over 10,000 executives placed in **leadership roles** **Over 92%** client retention

Access to 15M+ leaders via 20+ offices across 4 continents **85%** of placements exceed two years **Trusted by 90%** of Forbes GCC Top 100 companies

Firm established in the GCC in **1997** **Partnered with 9 out of 10** of the world's top banks

Gulf Employment Index

GCC: Hiring rose 1.3% quarter-on-quarter, reflecting a stable market as organisations maintained operational focus while navigating slower project activity.

UAE: Employment increased 3%, sustaining strong momentum through late Q3 as business activity and new orders picked up pace.

Saudi Arabia: Hiring grew 1.5%, supported by steady project delivery and non-oil sector expansion, though employers remained selective in adding headcount.

Qatar: Hiring held flat at 0.5% as operating conditions stabilised, with upcoming LNG projects yet to translate into meaningful workforce demand.

Oman: Hiring remained unchanged at 0%, with stable credit conditions and policy support, but limited new job creation.

Kuwait: Hiring declined 2% as business growth slowed and employers tightened cost controls.

Bahrain: Hiring decreased 1%, reflecting softer private-sector activity despite relatively stable economic conditions.

GCC Employment Trends: Q3 2025 Overview

Hiring across the GCC rose 1.3% in Q3, marking a steady but measured market shaped by different conditions across countries. Employers continued to advance strategic initiatives, but most kept tight control over headcount as financial and geopolitical uncertainties persisted.

Markets with active project pipelines saw measurable hiring gains, while smaller economies expanded at a steadier pace.

New hiring stayed focused on revenue-generating, project-delivery, and digital transformation roles, functions that deliver measurable business value.

The quarter underscored a broader move toward selective, skills-based growth. Employers balanced optimism in non-oil sectors with practical realities, linking hiring to concrete outcomes and budget discipline. Q3 employment growth in the Gulf is tied to proven performance.

External Economic Factors

The third quarter unfolded amid easing inflation and stable energy prices, giving Gulf governments relatively stable fiscal conditions. Oil prices stayed within a narrow range, allowing continued investment in infrastructure and diversification programs, while strong domestic demand compensated for weaker exports to Europe and Asia.

Expectations for interest-rate cuts gained momentum globally, but high borrowing costs and restricted credit availability continued to weigh on private-sector expansion. Further easing in rates, once it materialises, is expected to support stronger hiring activity across the region.

Despite these challenges, the GCC kept its economic momentum, powered by tourism, public spending, and solid consumer confidence, factors that helped sustain employment activity even as global conditions remained mixed.

Q3 2025 vs Q2 2025



UAE 3%



Saudi 1.5%



Oman 0%



Qatar 0.5%



Kuwait -2%



Bahrain -1%

Country Analysis

The UAE continued to lead the region, with hiring up 3%. Activity picked up through the quarter as business confidence improved and private-sector demand strengthened across real estate, aviation, and tourism. Continued foreign investment inflows and service-sector growth kept the UAE at the top of GCC hiring activity. Employers concentrated on operational and leadership roles to support sustained growth across these key sectors.

Saudi Arabia posted a 1.5% rise in hiring, keeping pace as major Vision 2030 projects progressed. Recruitment centred on infrastructure, tourism, and finance, though companies watched budgets closely, given high input costs and tighter access to financing. The priority shifted to completing projects and tightening operations, with many firms adding staff only as specific project milestones required it.

Hiring in Qatar held flat at 0.5% as the economy stayed steady ahead of major energy and infrastructure projects ramping up. The North Field East LNG project moved forward, but significant hiring from it isn't expected until closer to 2026. Financial services and hospitality remained stable, though most employers worked on boosting productivity internally rather than adding headcount.

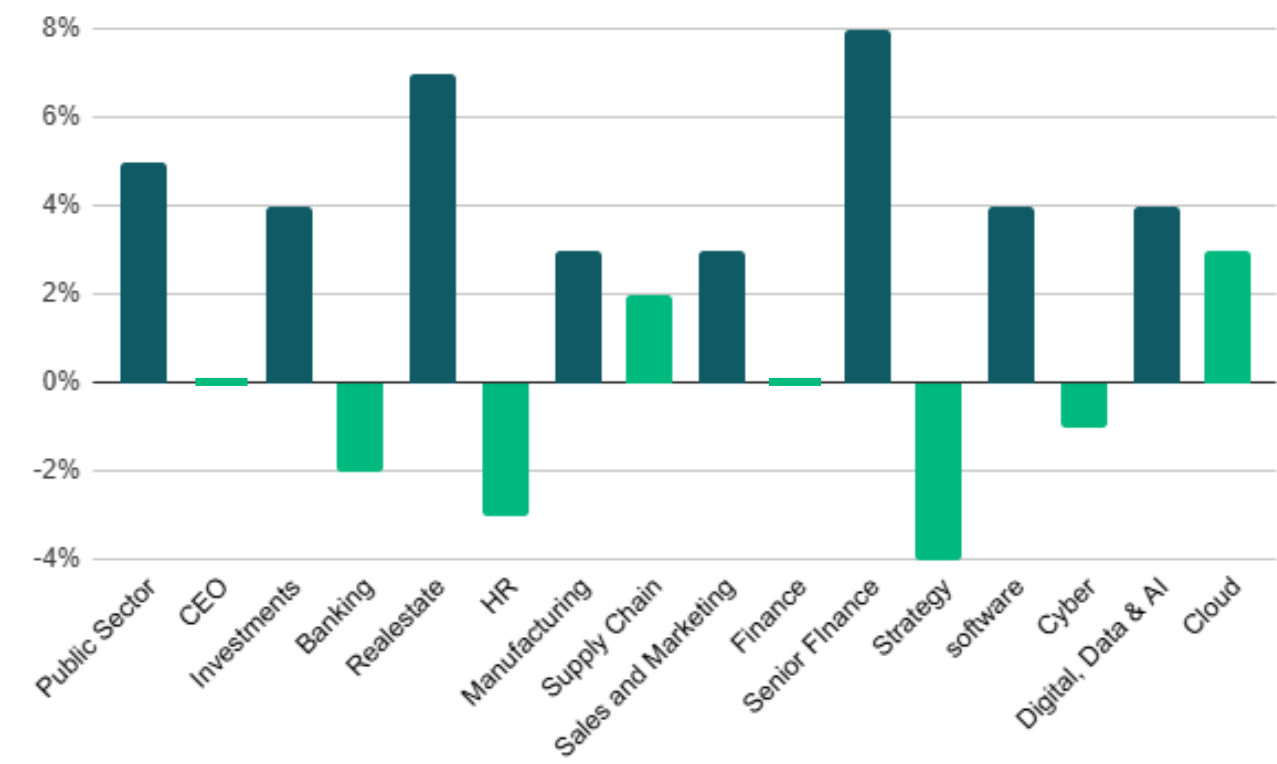
Oman's hiring remained flat 0% through Q3, with consistent activity in renewables, industrial, and logistics sectors. Better credit conditions and government investment programs continued to support employer confidence, but recruitment stayed focused on technical and supervisory roles. The market showed solid fundamentals, with employers encouraged by steady progress on Vision 2040 industrialisation goals.

Kuwait's labour market contracted by 2%, as companies limited new hiring amid slower domestic investment and ongoing cost pressures. Private-sector sentiment weakened during the quarter, leading firms to postpone new projects and focus on controlling costs. Most hiring was limited to replacement and compliance-driven roles, reflecting a conservative stance while broader fiscal reforms remain under discussion.

Bahrain's hiring declined by 1% in Q3 after some growth earlier in the year. Financial services and tourism continued to provide employment stability, but limited new capital inflows held back job creation. Employers stayed cautious, with recruitment largely replacement-based and focused on key operational positions. Market conditions remained steady but quiet, with future growth depending on increased private-sector investment.

Gulf Employment Index

Q3 2025 vs Q2 2025



Sector Analysis

Hiring activity across the Gulf in Q3 2025 continued to reflect controlled growth, with organisations prioritising financial leadership, operational strength, and digital capability. Senior Finance recorded the sharpest rise (+8%) as demand for FP&A and treasury talent intensified across the GCC. The need to manage liquidity, working-capital exposure, and funding structures grew as interest-rate uncertainty persisted. Overall, finance hiring held steady (0%), concentrated in roles linking analytics, forecasting, and risk to performance management.

Investments (+4%) hiring grew despite a softer deal environment, as firms strengthened operational and governance capacity rather than pure transaction volume.

With regional contract awards easing, activity shifted toward risk management, fund operations, and compliance roles supporting long-term capital deployment. New entrants such as global asset managers expanding in Abu Dhabi, Dubai, and Riyadh sustained steady hiring demand, signalling continued institutional confidence ahead of an expected rebound in deal flow in Q4.

In Banking (-2%), hiring eased as several major UAE banks advanced merger integrations and large-scale digital transformation programmes. These initiatives streamlined operations and internalised many traditional functions, limiting external recruitment during the quarter. That said, new mandates in credit, treasury, and risk roles emerging late in Q3 suggest a gradual pickup in activity heading into Q4.

Gulf Employment Index

Leadership hiring in the CEO Practice (0%) held steady, as most boards prioritised continuity and internal succession over external appointments.

Strategy (–4%) saw the sharpest decline as firms tightened advisory budgets and shifted toward internal project teams. Hiring continued in specialist areas such as AI, risk, and digital operations, but broader corporate-strategy functions faced slower approval cycles.

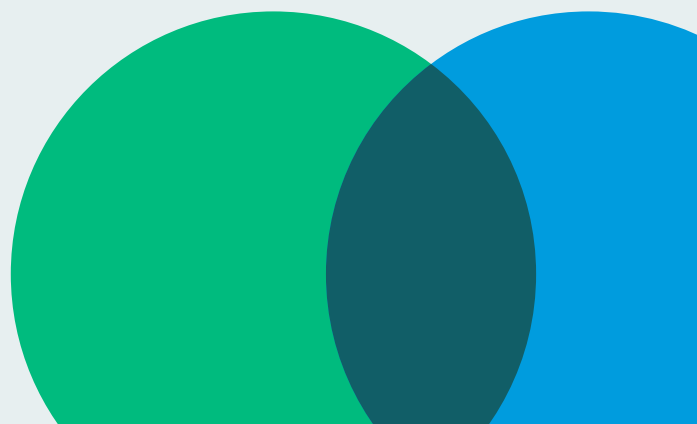
In contrast, operational and delivery-focused sectors showed renewed momentum. Real Estate (+7%) saw strong hiring in Saudi Arabia and the UAE, led by private-sector developers and joint ventures moving major masterplans into design and enabling stages. Roles in development management, project delivery, commercial, and technical functions were in high demand as both public and private investors pushed projects toward execution. Public Sector (+5%) hiring also expanded, driven by continued investment in national digitalisation and infrastructure programs.

HR (–3%) activity slowed as many organisations placed mid-process roles on hold amid shifting budgets and leadership changes. Recruitment was largely limited to compensation, workforce planning, and nationalisation mandates. Manufacturing (+3%) benefited from rising steel demand and continued investment in advanced manufacturing and automation, while Supply Chain (+2%) hiring increased as firms brought sourcing closer to home and invested in digital logistics systems.

Commercial functions remained resilient. Sales & Marketing (+3%) hiring picked up across real estate, renewable energy, industrial manufacturing, and consumer goods. Demand grew for senior marketing and commercial leaders capable of driving digital and AI-powered brand strategies, alongside continued recruitment in on-ground sales and business development.

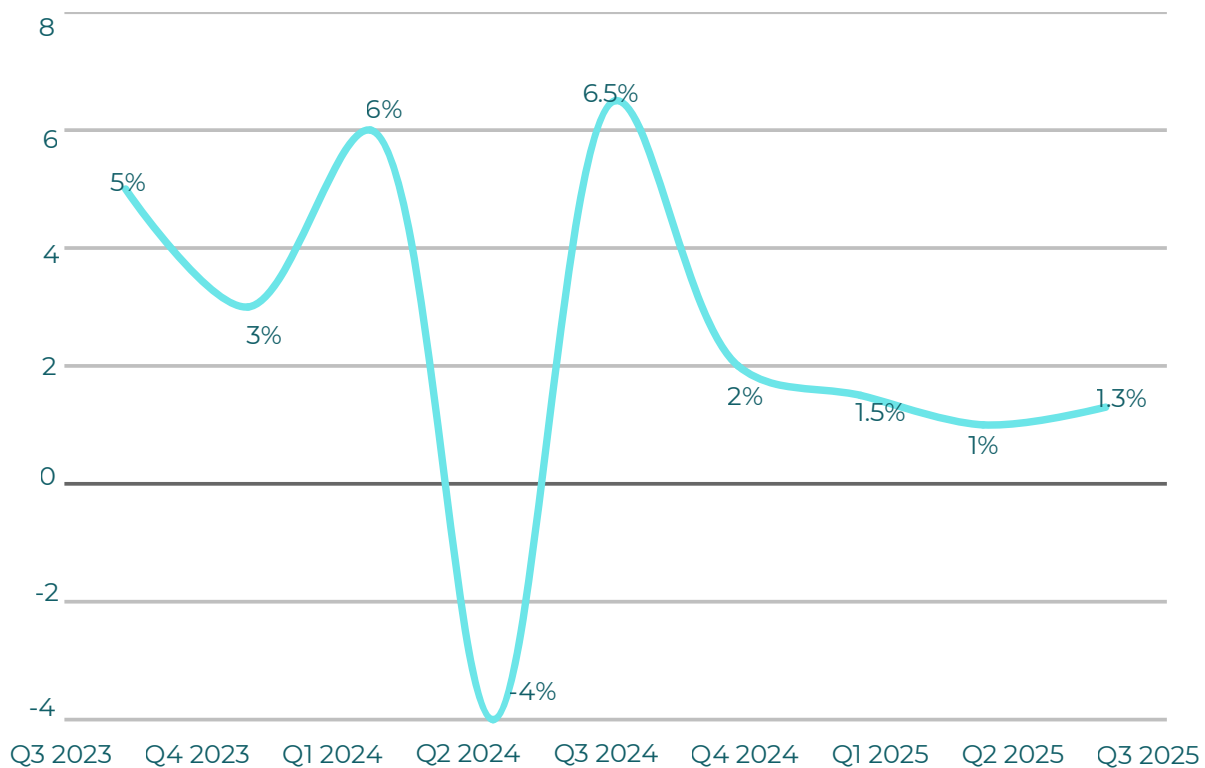
Technology hiring held steady at healthy levels. Software (+4%) gained ground as organisations pushed to complete automation and reporting-tool projects by year-end. Digital, Data & AI (+4%) remained one of the fastest-growing areas, supported by new government and enterprise investment in analytics and applied AI. Cloud (+3%) hiring focused on platform management and cost optimization rather than new migrations, while Cyber Security (–1%) eased slightly as mature teams focused on upskilling over expansion.

Finally, Legal (+2%) hiring improved modestly, driven by in-house counsel demand across investment, banking, and real-estate sectors, with governance and regulatory-compliance skills continuing to lead employer priorities.



Quarter-on quarter review

Percentage of increase in job opportunities accross the GCC.



The GCC labour market grew by 1.3% in Q3 2025, following the 1% increase recorded in Q2. Hiring activity remained steady but more deliberate, with most employers focusing on project delivery and essential business functions.

This quarter showed a more measured pace of hiring as markets continued to adjust after earlier growth. The UAE and Saudi Arabia remained the main drivers, supported by active project pipelines and consistent private-sector demand. Other markets were largely stable, with minor slowdowns linked to project delays or budget caution. Activity was strongest across infrastructure, senior finance, and technology, where investment and delivery programmes kept recruitment steady.

Hiring decisions became more selective through the quarter, with employers prioritising roles that directly contribute to revenue or execution. Non-essential positions were deferred as companies focused on maintaining progress within existing teams. Overall, the regional labour market remained steady, and demand is expected to hold firm into Q4, led by finance, real estate, and digital-led industries.

About Cooper Fitch

Cooper Fitch provides Recruitment, Executive Search, HR advisory and RPO services. Our team supports clients in the GCC and Europe with all talent-related matters. We are also a proud member of the Talent Club group of companies, with 37 offices across three continents.

Services

- Recruitment
- Executive Search
- HR Advisory
- Recruitment Process Outsourcing

We produce regular market insights and media reports and appear across respected business media outlets, including CNBC, Dubai Eye, Asharq News, CNN Business Arabic, Reuters, and Khaleej Times, to give our respected views on a wide range of human-capital subject areas.



Dr. Trefor Murphy
Founder and CEO
tmurphy@cooperfitch.ae



Mentalla Gouda
Executive Assistant
mgouda@cooperfitch.ae

Research Methodology

The Cooper Fitch Gulf Employment Index reviews new employment activity across the GCC, with a particular focus on changes in the number of new jobs in the region based on our proprietary data. Our team conducts extensive analysis for each quarter, calculating cumulative increases or decreases across multiple market segments.

The primary aim of this index is to compare quarter two of 2025 and quarter three of 2025. We hope you find our latest Gulf Employment Index insightful. If you would like to learn more about the services we offer or ask any questions about the contents of this report, please feel free to contact Mentalla Gouda by writing to mgouda@cooperfitch.ae