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Development

Research report

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Workforce
insights:
A Middle East
perspective

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Workforce insights: A Middle East perspective

Research report

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Executive summary

This report draws upon original research from over 1,000 HR decision-makers across the countries of the Gulf Cooperation Council (GCC). The report references several other important key sources and seeks to build a picture of current and future workforce priorities facing the region – addressing how these are being impacted by a dynamic social, political and economic context.

There is an increasing recognition of the value of the role of the HR function: indeed, 85% of business owners or C-level executive respondents believe HR strategy has a tangible impact on organisational performance.

Strategic workforce priorities

When clustered, the top current strategic workforce priorities fall into three major themes: attraction and retention of talent; employee well-being, happiness and engagement; and learning, development and performance management.

Attraction and retention of young talent (20%) and employee engagement (19%) were identified most often as current strategic priorities facing organisations across the GCC – and these were also most often highlighted as the most likely areas HR plan to ‘overhaul in the next five years’ (9% respectively).

When it comes to strategic HR planning, nearly half of respondents (48%) say their organisation takes a short-term approach of less than two years. While it is important

to be responsive to changes in your immediate context, it’s also important to recognise that some HR strategies will require planning over a longer-term horizon. For example, the increasing localisation of the workforce, or indeed significant shifts in workforce design due to changes in demographics, technology or skill requirements will require HR leaders to reimagine business through a longer-term lens. The risk of HR teams in the region taking a shorter-term approach to planning is that they remain reactive and focusing on current and immediate issues, as opposed to putting the necessary steps in place to meet the future needs of work, the workforce and the workplace.

Influences on workforce strategy

A number of demographic, socio-economic, political and technological factors shape how businesses view their future workforce plans. Regionally, respondent businesses view change in customer demands and demographics (34%), changing economic and political environment (32%), and shifting employee relationships and expectations (27%) as likely key influences on their workforce strategy.

When respondents are asked how much each of the top trends are likely to impact their organisation’s workforce strategy in the next five years, the changing economic and political environment understandably is seen to have the most extensive impact (45%). However, this is followed very closely by the recognition of the

need to innovate to compete (44%). Innovation has also been highlighted as a priority by various regional governments as part of their economic diversification agendas. And, when it comes to innovation, HR teams in the region are predominantly investing in training and development interventions (22%), employee benefits (21%), performance management (14%) and rewards and recognition (9%) to ensure their organisations are able to maximise their capacity for innovation. It is also surprising that hiring the right talent is so low down on these priorities (6%).

The research focuses on five key priority areas for organisations to help them meet their strategic priorities and respond proactively to the changes in the regional and global context. These are outlined below.

Investing in the workforce of the future

The Middle East and North Africa (MENA) region has a young population, almost 65% of which is under the age of 30 (Dhillon 2008). The current youth unemployment rate of 28.4% in the Middle East (Horne et al 2016), at nearly twice the global average, demonstrates the magnitude of the challenge faced. To provide meaningful employment to our younger generations will be critical to the long-term sustainability and prosperity of the region. It is therefore encouraging to see a young age profile in the workforces of respondent organisations, with the majority of the workforce (63%) aged 39

and under, and 32% aged under 30. It is also encouraging that most organisations across the GCC are proactively seeking to recruit young people (aged 16–24), with over half (57%) confirming that they recruit young employees, one-third (33%) offering internships, and 11% offering apprenticeships. Key reasons for doing so include: to build a talent pipeline (24%); to bring new thinking on latest technologies and techniques into the organisation (21%); and because they are seen as a cost-effective resource (20%).

The top ways in which respondent organisations collaborate with educational institutions to improve the work-readiness of young people are: offering internship programmes (33%); attending careers fairs to promote opportunities in their organisation (26%); offering work experience placements (24%); and offering workplace visits (24%). However, there are significant opportunities for industry to partner more closely with the education sector given that only 15% of survey respondents indicated they are working with institutions to design course syllabuses to meet their future workforce needs.

Women in the workplace

The rationale for encouraging improved representation of women in the workplace goes far beyond an organisation's corporate social responsibility (CSR) statement and is strengthened by a sound business case (CIPD 2015b). In the GCC, commendable efforts in the education of women have led to an increase in female literacy rates; however, despite these achievements, gender inequality in the job market remains an issue.

Responses to this survey indicate that women make up approximately 26% of regional

organisations' total workforce, against a global average of 40% (World Bank 2014). The under-representation of women becomes even more accentuated when we look at their progression through to senior and executive roles, with women making up 21% of management or mid-management positions, 16% of senior management roles and 15% of organisations' executive boards.

There are, however, signs of change, with 23% of respondents saying their executive board is made up of 30% or more women and 12% of respondents confirming 50% or more of their board are women. Over half (55%) of respondents state that proactive efforts are currently being undertaken to improve gender diversity.

However, there are some considerable challenges experienced by organisations on this issue, which include: a lack of flexible work opportunities (29%), and a lack of women (talent/skills) in our sector (29%). In addition, a lack of senior female role models (17%) and entrenched attitudes of senior leaders (14%) are also often cited as obstacles that need to be addressed. While efforts are being made across the GCC to increase female workplace participation, progression of women to senior and executive roles requires a strong and sustainable framework to recruit and develop women at every stage of their career.

Employee health and well-being

With high workplace stress being acknowledged as a concern by employers in the region, employee well-being initiatives are on the rise in the GCC (*Khaleej Times* 2015). However, only 14% of respondents stated they have a standalone strategy for health and well-being

and only 19% consider health and well-being an integral part of their people strategy. While a promising 24% of respondents state that well-being is taken into consideration in all business decisions, 21% confirm that operational demands take precedence over well-being considerations.

The most common ways in which organisations strive to improve employee well-being is by focusing on: improving relationships at work (34%); offering personal development opportunities (33%); and offering benefits such as health insurance (44%).

Thirty per cent of respondents confirmed their organisation's investment in well-being initiatives had increased in the past 12 months. However, the research confirms that too few organisations evaluate the organisational impact of their health and well-being activities, with only 35% of organisations that invest in employee well-being having a formal mechanism to measure the return on investment (ROI), or the value they receive in return.

Flexible working

This study finds that a significant number of organisations in the GCC do offer some form of flexible working arrangements. In fact, 27% of respondents say their organisations have increased their flexible working practices within the region over the last 12 months. For the organisations that offer flexible working, the most commonly offered arrangements include: flexitime (ability to choose start and finish time within core hours) (21%); mobile working (for example, using a laptop to work from another location) (19%); flexi-place (option to work from home some days a week) (16%); and part-time working (16%).

‘With the changing face of the regional workforce and increases in multigenerational and gender diversity, a more positive move towards offering flexible working arrangements will be critical to meet the demands and expectations of the workforce of the future.’

These results show that more can be done to offer opportunities for part-time work in the region. Rather worryingly, 25% of respondents are actually expecting to decrease their part-time workforce over the next 12 months. With the changing face of the regional workforce and increases in multigenerational and gender diversity, a more positive move towards offering flexible working arrangements will be critical to meet the demands and expectations of the workforce of the future.

The impact of technology in the twenty-first-century workplace

Continued waves of technological change inevitably shape the economy and the nature of work. *‘Technological advances have revolutionised industries, changing the nature of tasks and the kinds of activities employees engage in’* (The Economist Corporate Network 2016). This research finds that at an overall level, 88% of respondents expect advances in technology to have an impact on their organisations in five years’ time, and 85% expect the impact to be a positive one. The areas where technology is anticipated to have the greatest impact are: productivity (22%), efficiency (21%) and quality (19%). As illustrated in figure 38, a majority of respondents (67%) expect that in five years’ time up to 30% of hires in their sector will be for roles that do not currently exist. A further 23% think that over 31% of hires will be for roles that do not currently exist. Respondents were relatively less radical when asked what proportion of jobs would become obsolete in the next five years, with 40% stating less than 10%, and 15% feeling no jobs would become obsolete.

The research indicates that organisations are increasingly using social media channels to engage with customers (24%) and also as a brand-building tool (21%), and to this end encourage the use of social media among their employees. However, the use of social media for internal collaboration and employee engagement is still limited. Furthermore, only 16% of respondents feel that employees can be trusted to use social media sensibly, 19% of respondents limit access to social media in the workplace and 21% have clear rules to ensure employees do not damage the company brand on social media. While protection of security and brand are important, it is also important that any potential restrictions don’t work against the positive impacts of innovation and improved customer experience that optimising social media in the workplace can bring.

We hope this report helps inspire an aspirational agenda for organisations in the region. While we have presented the research findings in separate sections around key themes, they are of course all interrelated. Organisations need to consider each trend in their own business context and translate their understanding to guide and inform their future strategy.

Introduction

This report aims to explore the current priorities and future plans for organisations in the countries of the Gulf Cooperation Council (GCC) with regards to their workforce, set against the backdrop of the present and emerging regional context.

The GCC countries have witnessed significant economic shifts over the past two years. According to the International Monetary Fund, oil price drops of nearly 70% since 2014 have resulted in regional budget surpluses turning into deficits. Economic growth in these countries has nearly halved from 3.5% in 2014 to an estimated 1.8% for 2016 on average (International Monetary Fund 2016). This has resulted in lowered public sector spending and a slowdown in private sector activity, raising concerns about financial risks in the region.

The countries in the GCC have reacted to this 'new normal' not just by reducing government spending, but also by putting in motion socio-economic and policy changes – such as phasing out subsidies, an increased focus on economic diversification, nationalisation of the workforce, and consideration of introducing alternative revenue streams such as VAT and excise taxes – all of which would have considerable impact on regional businesses.

With a largely expatriate workforce and businesses that are increasingly outward-looking and internationally focused, organisations in the GCC are also exposed to and impacted

by global trends influencing the HR agenda. While the reduction in oil revenues has influenced an increase in the pace of change across the region, pressure for regional transformation is also in response to these trends that are affecting organisations and countries globally. A recent research study summarised these trends as '*disruptive changes in the talent landscape*', with changes in workforce demographics, the effects of digitisation and technology, and the emergence of a new social contract between employees and employers (Deloitte 2016a, p2). The GCC workforce is young, diverse, internationally mobile and highly digitised, creating impetus for organisations in the GCC to respond to these global trends in order to best attract and retain global talent.

This research sought the views of business leaders, senior executives and middle and junior managers either involved in making HR decisions or working specifically in the HR profession across the GCC. We recognise that this is a diverse region and country differences are highlighted wherever possible. All surveys were conducted online via either YouGov's pure research panel across the GCC or the CIPD's contacts/database. A total of 1,079 HR decision-makers were surveyed, with fieldwork undertaken in June and July 2016. This study also draws on other sources of relevant research into key trends impacting organisations globally.

The findings are intended to help HR professionals and organisational leaders to

understand and consider the broader context in which they are operating. We hope it inspires them to proactively and successfully tackle the challenges ahead, embrace opportunities within our 'new normal' world of work and help shape the future of work and HR in the region.

Acknowledgements

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- Claire McCartney, research associate, for her support in writing this comprehensive report.

We hope that you find the research useful when considering your own HR priorities and future strategy. Please contact us if you have any questions or ideas based on our findings: [**contactus@cipd.ae**](mailto:contactus@cipd.ae)

1 The research

All respondents to the survey are directly involved in making HR decisions for their organisations. Over a third (35%) are business owners/proprietors or senior management (C-suite, board level), one-quarter (23%) are senior managers (non C-suite/ below board level), while the remainder (43%) are either middle or junior managers.

Relevance to the HR function

The largest proportion (48%) of respondents work for an organisation in an HR/L&D role, with the rest working for either an HR/L&D consultancy (8%), a supplier to the HR/L&D community (7%) or 'other' (38%) (see Figure 1).

Geographical representation

As shown in Figure 2, in terms of their primary work location, most respondents are based in either the United Arab Emirates (UAE) or Kingdom of Saudi Arabia (KSA) (59% and 26%, respectively), with 15% having regional responsibilities across the GCC.

Figure 1: Relation to HR (%)

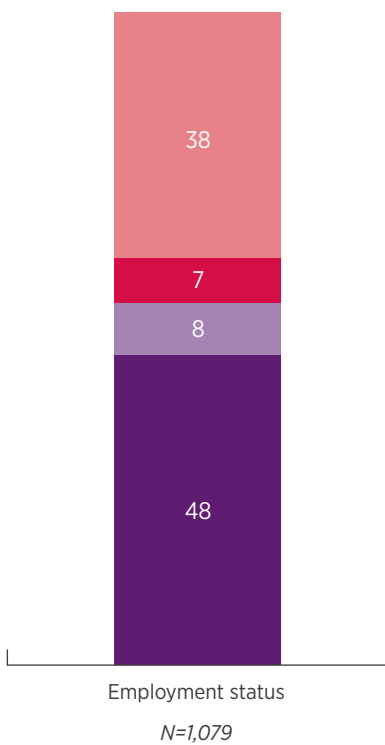
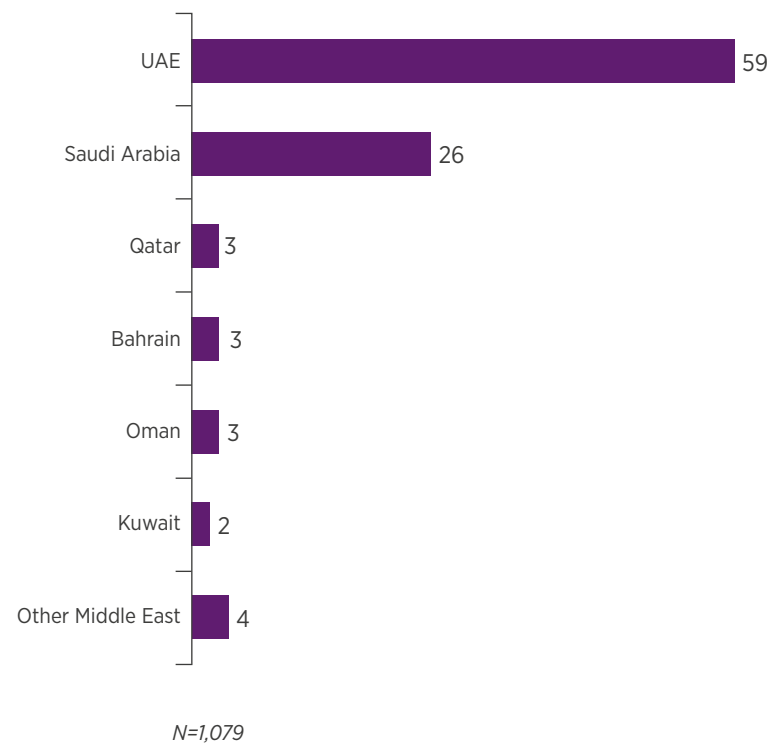


Figure 2: Primary work location of respondents (%)



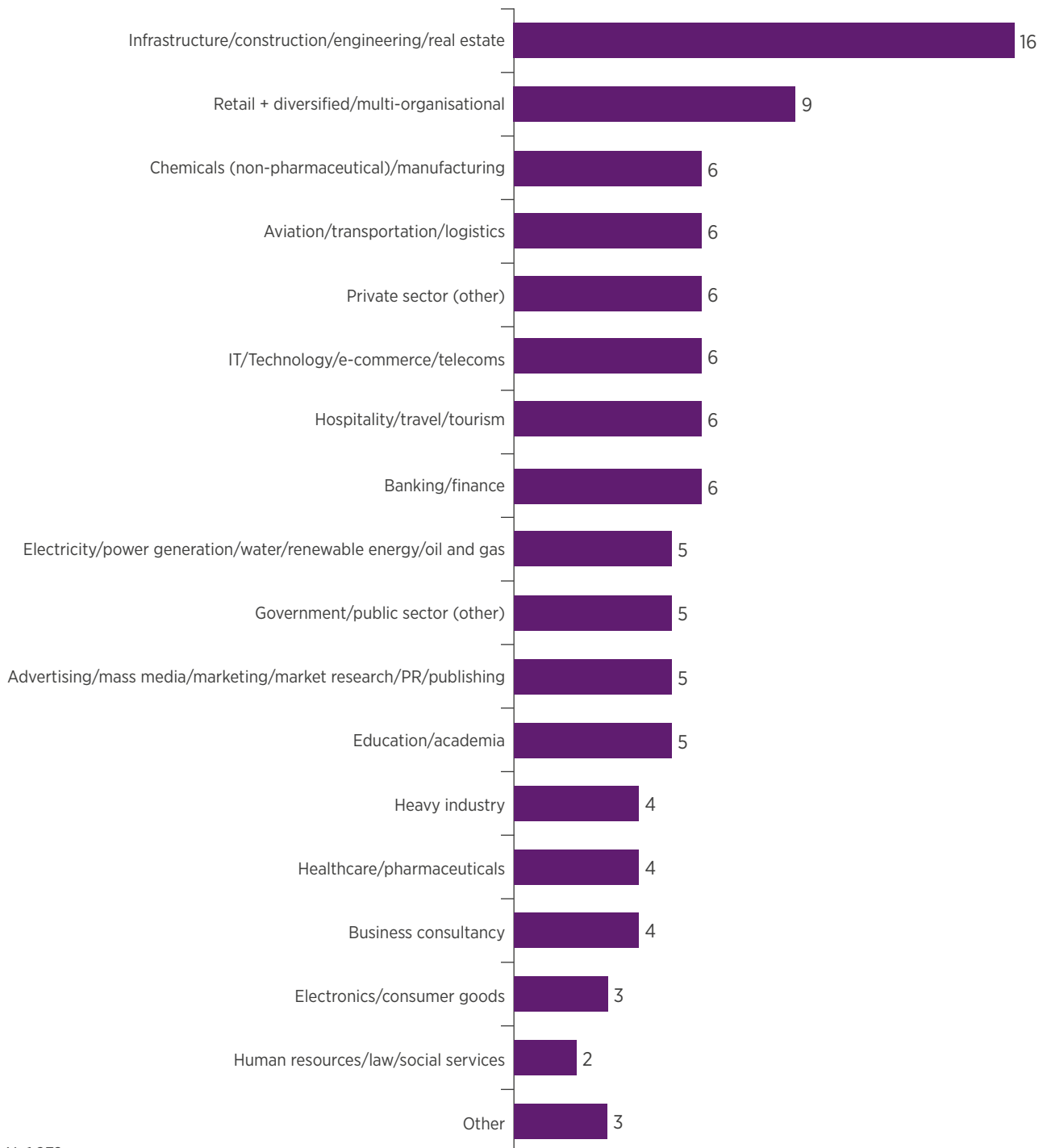
- Other
- I work for a supplier of services to the HR/L&D community (excl. consultancies)
- I work for an HR/L&D consultancy
- I work for an organisation in an HR/L&D role

Industry sector representation

Respondents come from a wide range of industry sectors, with infrastructure/construction/engineering/real estate being the most prominent (16%), followed

by retail and diversified/multi-organisation (9%), banking/finance (6%), hospitality/travel/tourism (6%), IT/technology/e-commerce/telecoms (6%) and aviation/transportation/logistics (6%) (see Figure 3).

Figure 3: Industry sector of respondents (%)



N=1,079

Organisation revenue and number of employees

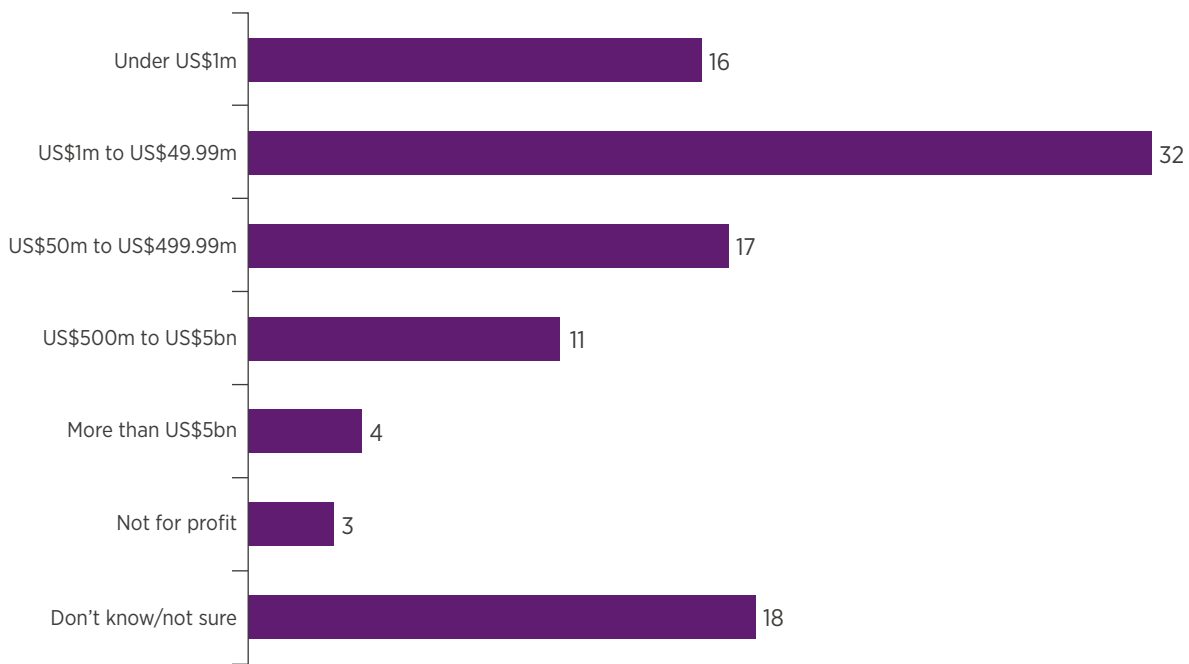
As shown in Figure 4, almost a third (32%) of respondents come from organisations with annual revenues of US\$1 million to US\$49.99 million. Seventeen per cent come from organisations with

annual revenues of US\$50 million to US\$499.99 million, and 16% with annual revenues of less than US\$1 million.

When it comes to the number of employees respondents employ across the GCC, Figure

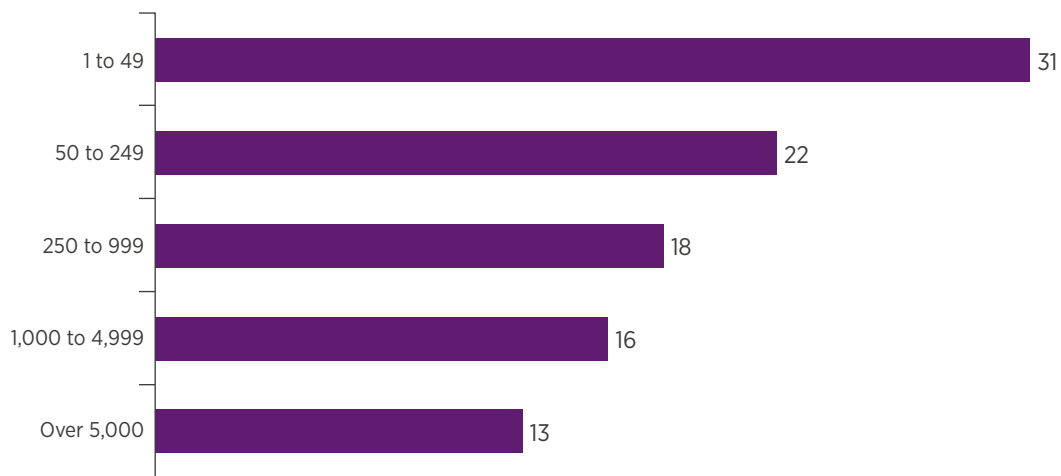
5 demonstrates that almost a third (31%) are working for small organisations of fewer than 50, 22% are working for medium-sized organisations (50-249) and the remainder (47%) are working for large organisations of 250+ employees.

Figure 4: Annual revenue of the organisation in the GCC (%)



N=1,079

Figure 5: Number of employees in the GCC (%)



N=1,079

2 Top workforce strategic priorities

As regional businesses adapt to the new economic reality of lower oil prices across the GCC, we are witnessing a period of increased uncertainty and rising organisational focus on cost optimisation.

This study starts by examining the role of HR in an organisation, and how workforce priorities for HR teams across the GCC are being influenced by the need for businesses to realign themselves to the current economic scenario.

The HR function is viewed as a key business enabler

As Figure 6 illustrates, there is increased confidence in the role the HR function has to play, with 82% of respondents perceiving that their HR strategy tangibly drives improved organisational performance.

Of the respondents, 85% of those that are business owners or C-level executives believe HR strategy has a tangible impact on organisational performance, which is a significant endorsement of its value.

Current focus on attraction and retention of talent and employee engagement

From a wide range of HR activities listed, attraction and retention of young talent (20%) and employee engagement (19%) were selected most often as current strategic priorities for organisations across the GCC (see Figure 7).

The top current strategic priorities for organisations can be clustered under three major themes:

- 1 attraction and retention of talent
- 2 employee well-being, happiness and engagement
- 3 learning, development and performance management.

Figure 6: How much does your HR strategy tangibly drive improved organisational performance? (%)

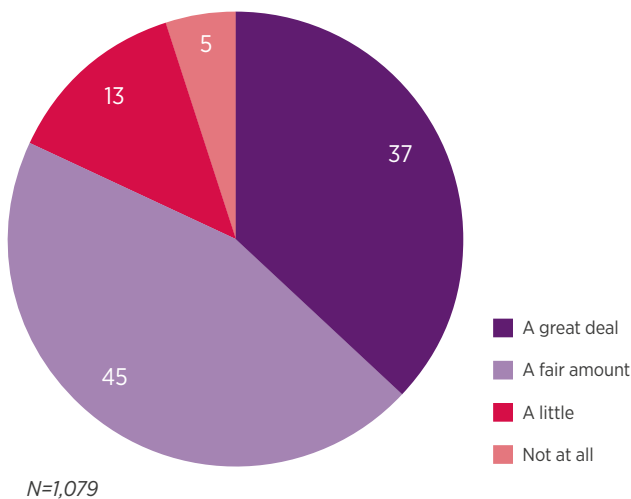
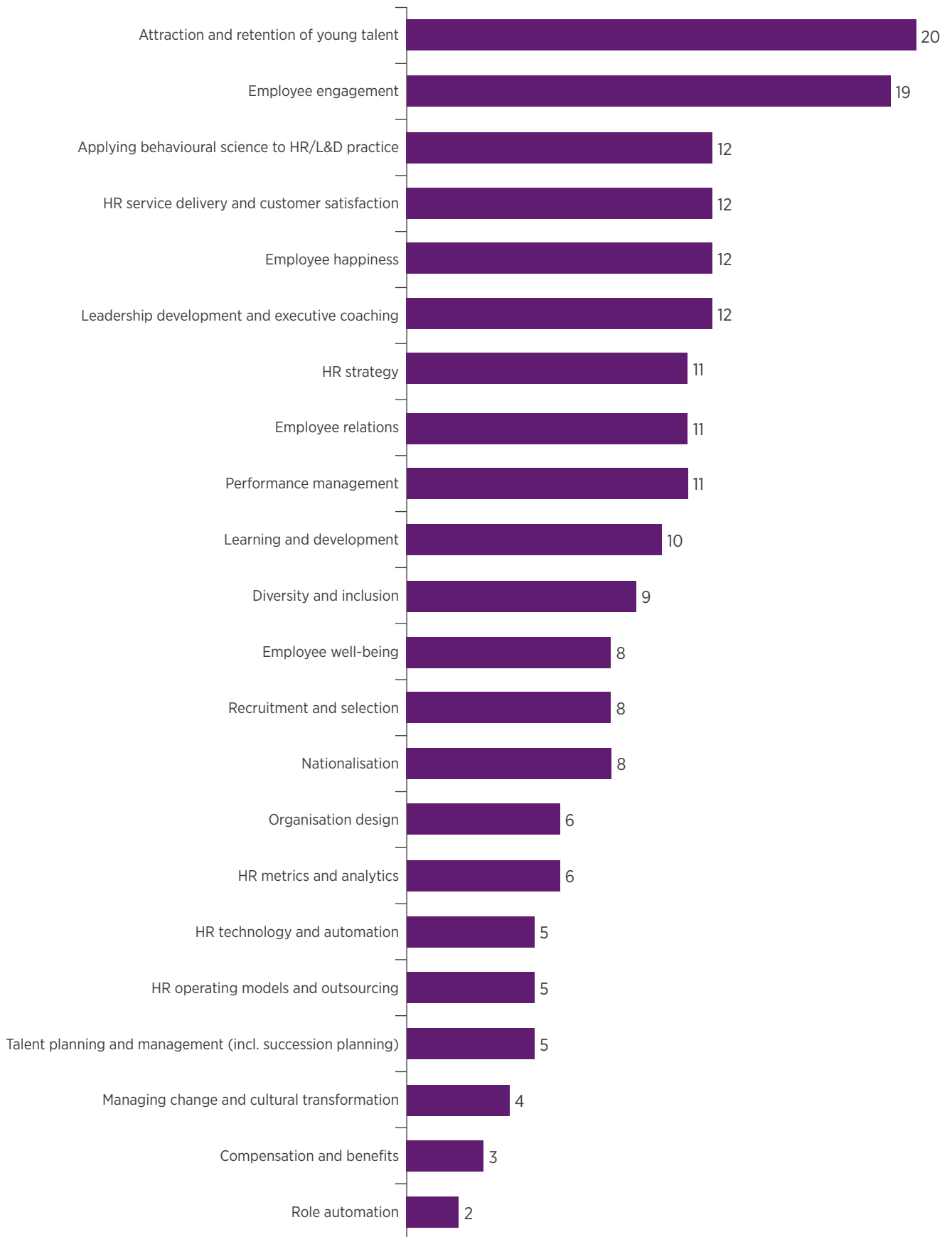


Figure 7: Which of the following HR activities are the CURRENT strategic priorities for your organisation across the GCC? (%)



N=1,052

Government priorities – a key catalyst for change

Government policies have a key role to play in setting a social agenda for businesses to comply with. This is particularly true in the GCC, where the government acts not just in a regulatory capacity, but in many cases also as a major investor and employer in its own right.

The positive impact of government priorities on driving change in organisations across the region and influencing workforce priorities is evidenced by the following findings of the study:

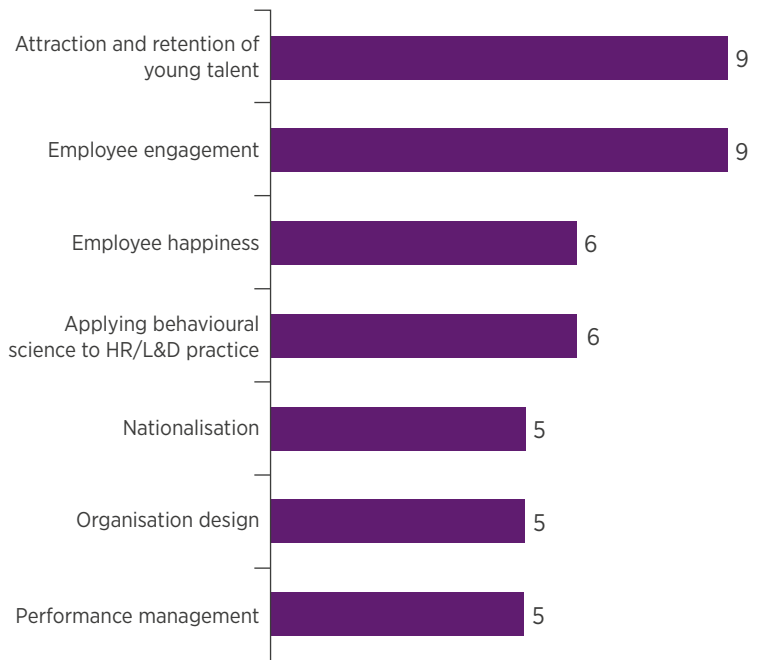
- In the UAE, employee happiness came out as a key strategic priority for organisations, with 14% of respondents placing it among their top three priorities. This appears to be in line with the current UAE government focus on employee happiness. The UAE Government recently announced the appointment of a Happiness Minister to ‘develop ideas and policies that would help government improve people’s well-being so they can have happy lives ... and develop better services that promote people’s welfare’ (7 days 2016). The research evidences that this has already had a positive impact through raising the priority of employee happiness across respondent organisations in the UAE.
- In Saudi Arabia, the recent launch of the 2030 vision lays down the country’s plans to increase participation of nationals in the workforce and reduce the unemployment rate of Saudis from 11.6% to 7% (Vision 2030 Kingdom of Saudi Arabia 2016). This focus is reflected in the research findings, with 13% of respondents highlighting nationalisation as a top priority.

Reflecting on this, while it is extremely encouraging to see the positive impact of government initiatives in such a short space of time, it is important that implementing change driven by government policy is not in isolation of, or at the expense of, priorities required to drive specific organisational strategies.

Priorities anticipated to remain consistent in coming years

In line with their current priorities, when asked which activities their organisation is looking to overhaul its approach to in the next five years, attraction and retention of young talent and employee engagement still top the list (both 9%). This is followed by 6% of organisations that are looking to overhaul their approaches to employee happiness and another 6% looking to overhaul the way they apply behavioural science to HR/L&D (see Figure 8).

Figure 8: Is your organisation looking to overhaul its approach to any of these activities in the next five years? (%)



N=1,079

One in every ten respondents confirmed that their organisation is not looking to overhaul its approach to any of the HR priorities listed in the next five years. When asked if their organisation is planning to stop doing any of the activities listed in the next five years, almost half (48%) answered 'none of the above', suggesting that most organisations are likely only to fine-tune their approach towards their strategic priorities rather than making any dramatic shifts. This is in line with the results of our performance management research conducted in April this year, which suggest that HR functions are looking at evolution rather than revolution of their practices.

As described earlier, the context of this survey is to encourage reflective thinking through an outside-in perspective. With this in mind, while it is important not to change for the sake of changing, it is equally important to

ensure that HR professionals are regularly challenging themselves to ensure their approaches, policies and support tools remain fit for purpose and continue to support and drive the necessary outcomes for their business in the changing context in which they are operating.

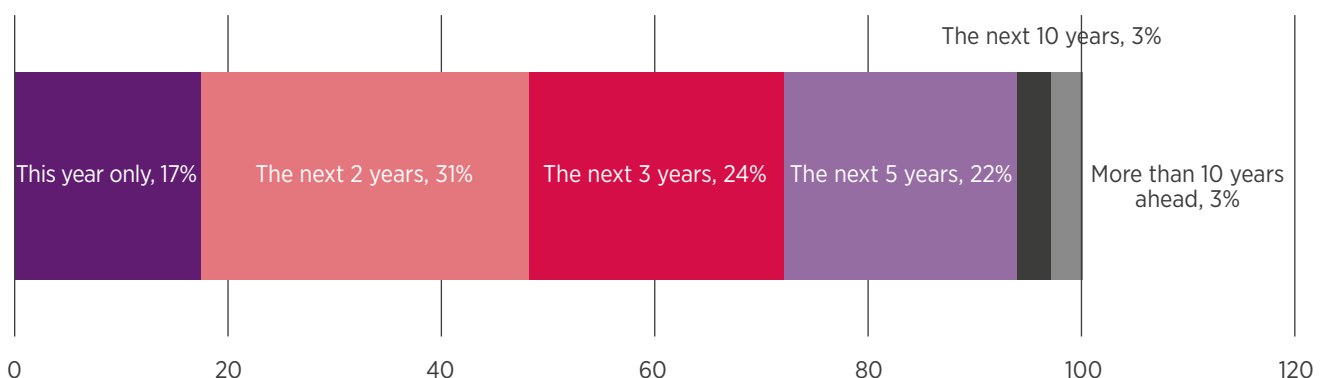
Short-term focus when planning HR priorities

As illustrated in Figure 9, almost half of respondents (48%) state that their organisations take a short-term approach to strategic HR planning (over a shorter than two-year time horizon), and only one in four organisations plan their HR strategies over a ten-year horizon.

While there is no optimal planning horizon to suit all organisations, a strategic HR plan is concerned with '*longer-term people issues, matching resources to future need and macro-concerns about structure, quality, culture, values, commitment*' (CIPD 2015, p1); by its

very nature this therefore suggests a longer-term outlook is required. As the HR strategy is ideally inextricably linked to the business strategy, the planning horizon should align to the planning horizon for the business. While it is important to be responsive to changes in your immediate context, it's also important to recognise that some HR strategies will require planning over a longer-term horizon. For example, the increasing localisation of the workforce, or indeed significant shifts in workforce design due to changes in demographics, technology or skill requirements will require HR leaders to reimagine business through a longer-term lens. The risk of HR teams in the region taking a shorter-term approach to planning is that they remain reactive and focusing on current and immediate issues, as opposed to putting the necessary steps in place to meet the future needs of work, the workforce and the workplace.

Figure 9: When planning HR strategic priorities, how far ahead does your organisation typically look? (%)



N=1,079

3 Influences on workforce strategy

A number of demographic, socio-economic, political and technological factors shape how businesses view their future workforce plans. While each country in the region has unique considerations, GCC businesses generally share some characteristics, such as: a high reliance on expatriate talent and the corresponding challenges and opportunities that brings; a relatively transient customer base; under-representation of women in the workplace; a youth bulge; and, at present, a challenging economic climate. While the regulatory environment in the region on the whole is extremely stable, the pressures created by the 'new normal' of oil prices, coupled with regional governments' plans to look at additional revenue-enhancing measures, have created further uncertainty in the outlook for business leaders while planning their future workforce strategy.

External factors most expected to drive future workforce priorities

As illustrated in Figure 10, regionally, respondent businesses view the following as likely to have the most significant impact on their organisation's future workforce strategy:

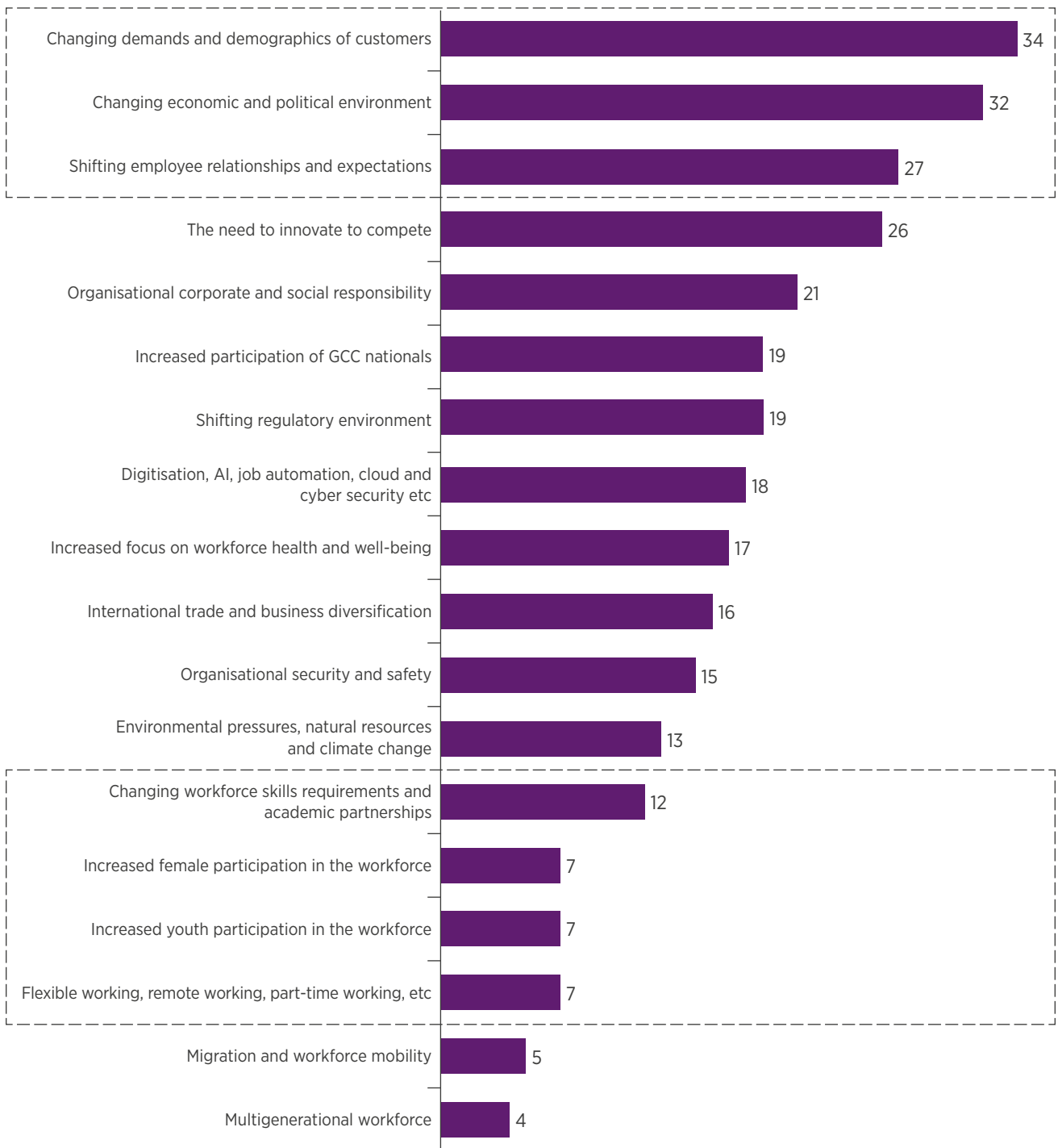
- change in customer demands and demographics (34%)
- changing economic and political environment (32%)
- shifting employee relationships and expectations (27%).

It is also interesting to note from Figure 10 that many of the trends predicted to least impact organisations over the next five years are initiatives that require internally driven change. Insight from the research indicates increasing youth and female participation in the workforce, and enabling flexible working, are anticipated to have less of an impact on respondent organisations' workforce planning. These insights bring into question how much HR functions and organisations are anticipating and proactively preparing for the inevitable changes the global trends will bring.

Notable regional differences exist:

- The UAE is a mature market that has a well-diversified economy, and an international workforce that often services businesses across the MENA region. Hence respondents suggest that besides external factors such as a changing economy and consumer demands, there is a greater emphasis on internal employee-focused activities such as changing employee relations (29%) and an increased focus on workforce health and well-being (19%). This is in line with the value proposition of being a regional business hub that the UAE seeks to maintain and reinforce. Being viewed as a preferred hub for talent is a crucial element of this proposition.
- Saudi Arabia, on the other hand, with its 2030 vision, is increasingly focused on diversifying the economy, and providing employment opportunities to Saudi nationals. Hence the trends anticipated to have the most significant impact include changing economic and political environment (33%), shifting regulatory environment (28%) and increased participation of nationals (27%).

Figure 10: In the next five years, which of the trends do you anticipate will have the most significant impact on your organisational workforce strategy? (%)



N=1,079

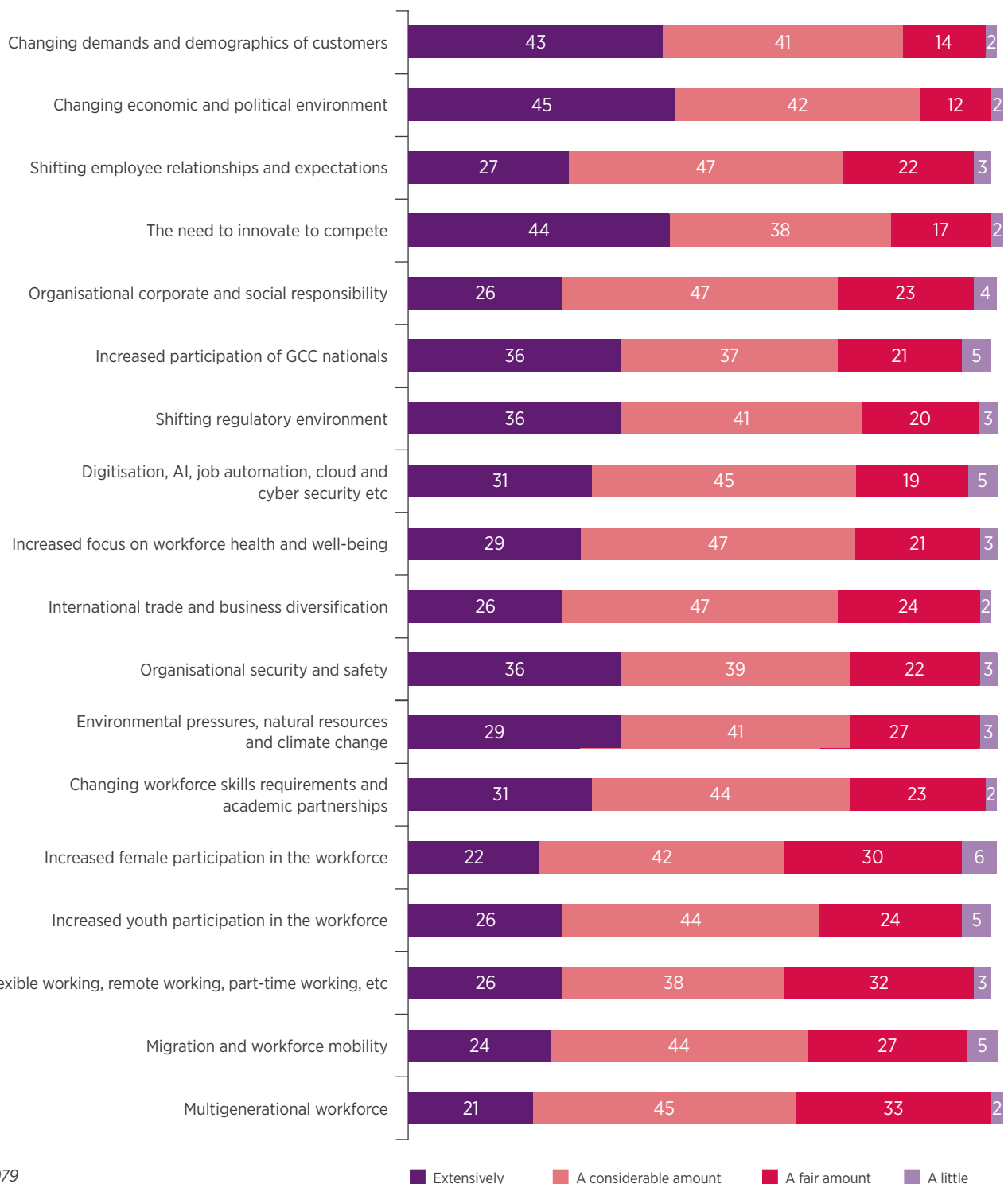
Innovation seen as a key influence

When respondents are asked how much each of the top trends are likely to impact their organisation's workforce strategy in the next five years, the changing economic

and political environment understandably is seen to have the most extensive impact (45%). However, this is followed very closely by the recognition of the need to innovate to compete (44%), as seen in Figure 11.

Innovation has also been highlighted as a priority by various regional governments as part of their economic diversification agendas. As an example, the UAE launched a National Innovation Strategy in 2014, and declared

Figure 11: How much do you think each of these 'top trends' will impact your organisation's workforce strategy in the next five years? (%)



N=1,079

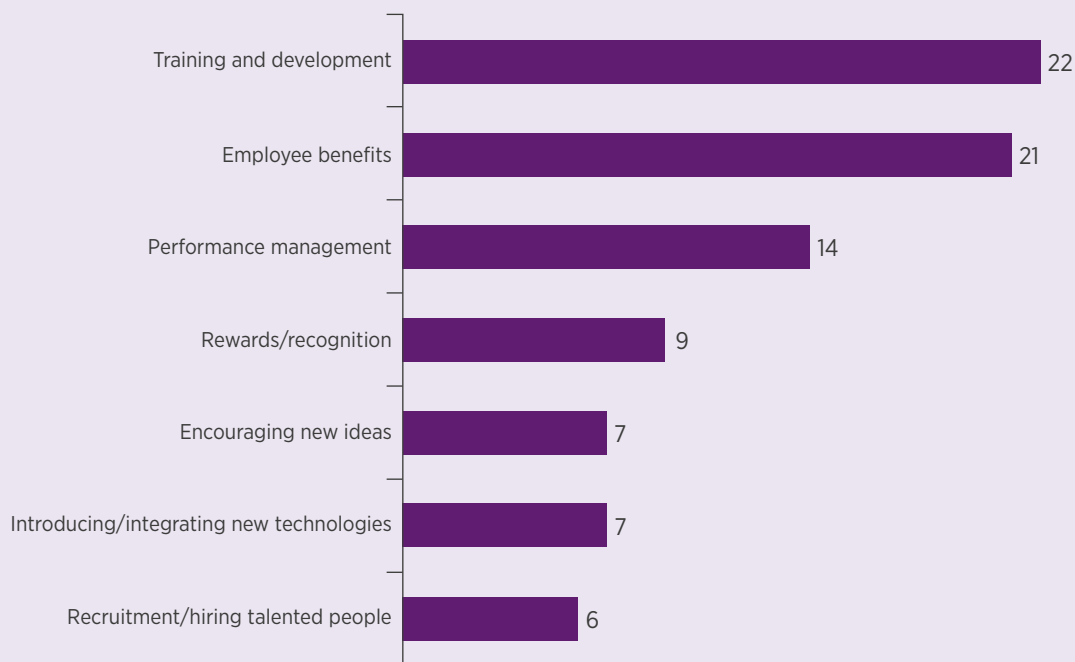
2015 the ‘Year of Innovation’. It is perhaps therefore unsurprising that organisations in the UAE were more likely to reflect this within their own priorities, with 27% of respondents considering it a top influence on workforce strategy (as against 23% in Saudi Arabia, and 20% elsewhere in the GCC).

How can HR teams help foster innovation?

With the future success of companies becoming more intertwined with their ability to innovate in every aspect of their business, there is an increasing appreciation of the role HR can play in attracting, retaining and nurturing the most crucial element – talent.

Figure 12 shows that HR teams in the region are predominantly investing in training and development interventions (22%), employee benefits (21%), performance management (14%) and rewards and recognition (9%) to ensure their organisations are able to maximise their capacity for innovation.

Figure 12: What ONE thing is your HR team doing to support innovation or productivity across your organisation? (%)



It is also surprising that hiring the right talent is so low down on these priorities (6%), especially given that in the 2015 Middle East CIPD *Voice of the Profession* research, recruitment and selection was seen by 39% of respondents as the top HR priority facing the region (CIPD 2015a). Obviously this research was undertaken before the realignment of global oil prices.

4 Key themes

Investing in the workforce of the future

The MENA region has a young population, almost 65% of which is under the age of 30 (Dhillon 2008). And with one in five people aged between 15 and 24, a large number of people are looking to join the workforce today and over the next five years. A current youth unemployment rate of 28.4% in the Middle East (Horne et al 2016), at nearly twice the global average, demonstrates the magnitude of the challenge faced. To provide meaningful employment to our younger generations will be critical to the long-term sustainability and prosperity of the region.

In the context of this youth bulge and the strategic focus of nationalisation, it is encouraging to see a young age profile in the workforces of respondent organisations, with the majority of the workforce (63%) aged 39 and under, and 32% aged under 30, as illustrated by Figure 13.

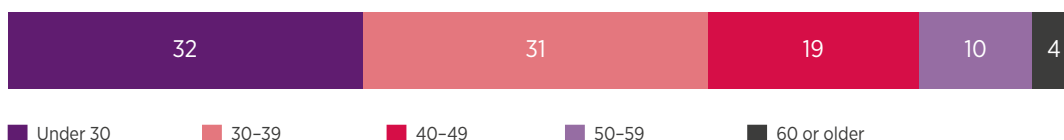
A proactive approach to recruiting young people

As was referenced in Figure 7, 20% of respondents highlighted attraction and retention of young talent as a current strategic priority. It is encouraging to see this focus reflected in working practices, with most organisations

across the GCC proactively seeking to recruit young people (aged 16–24), with over half (57%) confirming that they recruit young employees, one-third (33%) offer internships, and 11% offer apprenticeships (as seen in Figure 14).

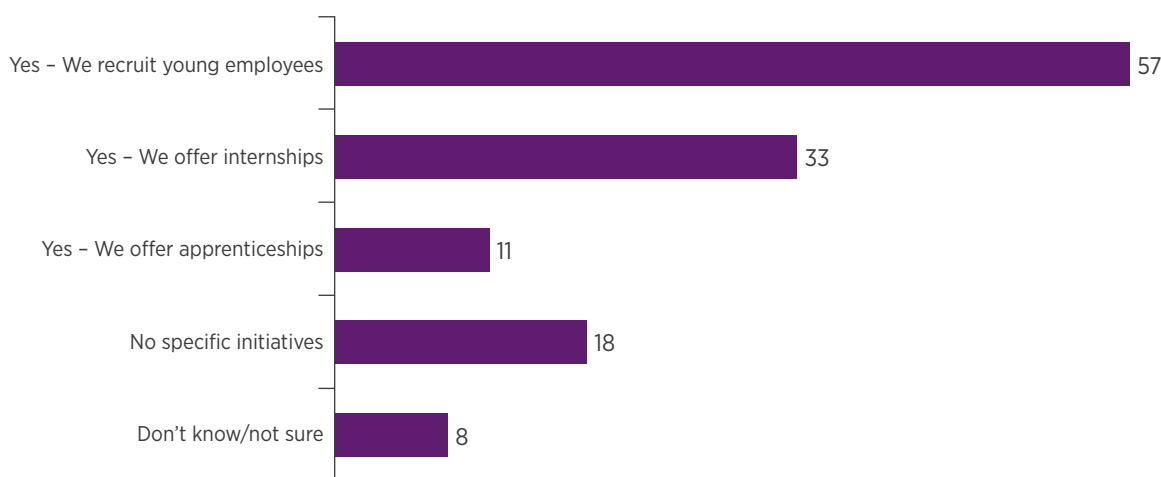
Alongside organisational activity, new regulations, such as a decree in the UAE allowing companies to hire students on temporary work permits for short-term employment such as internships, are easing the way towards greater youth participation in the workforce (WAM 2016).

Figure 13: Workforce age profile (%)



N=1,079

Figure 14: Does your organisation proactively look to recruit young people (aged 16–24) across the GCC? (%)



N=1,079

Top motivators for recruiting young people

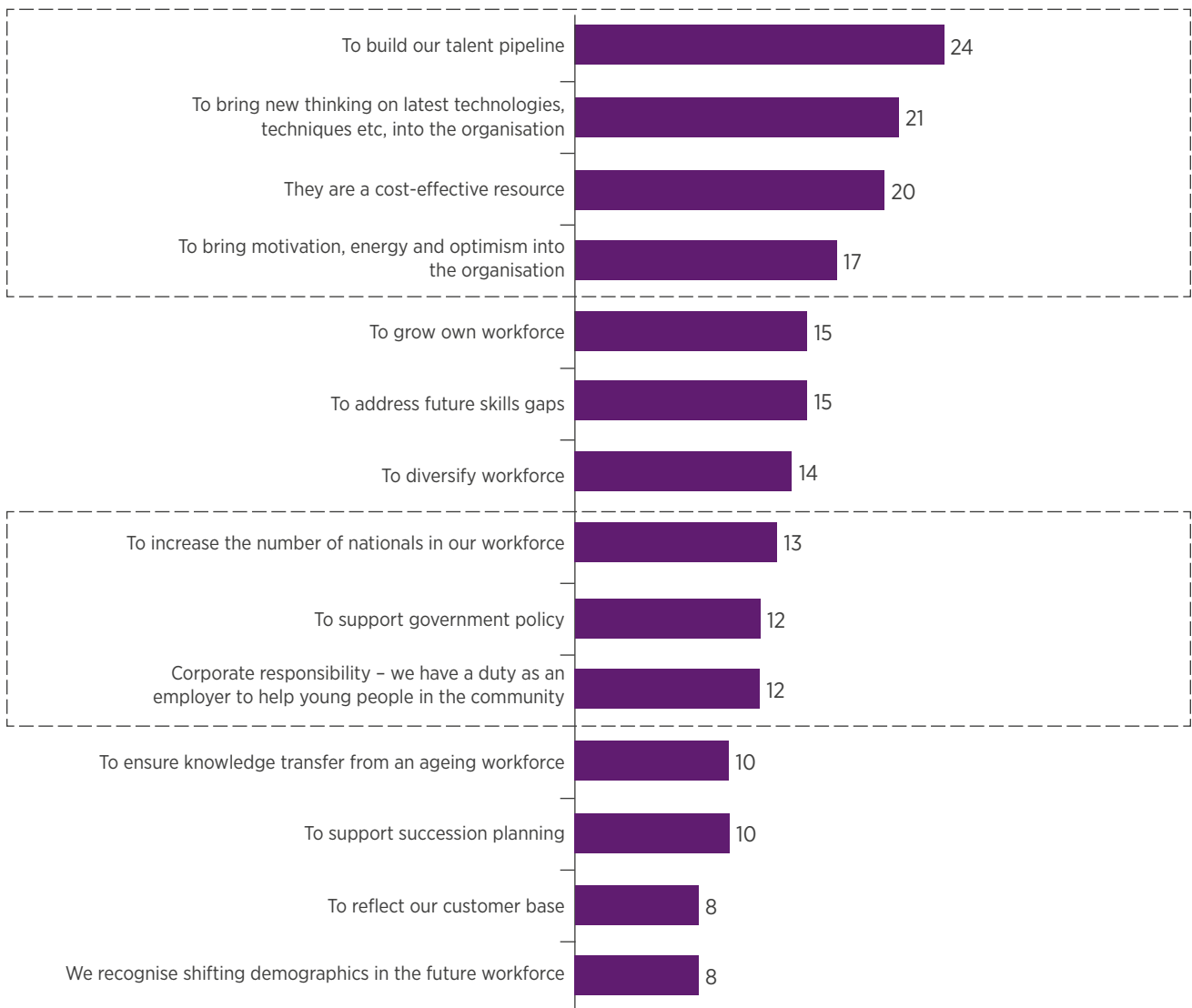
Results suggest organisations across the region recognise the value of proactively recruiting young people, most often doing so to benefit the business, rather than for altruistic reasons. Indeed, when asked to rank the three reasons

why their company recruits young people, the following were top:

- to build our talent pipeline (24%)
- to bring new thinking on latest technologies, techniques, and so on, into the organisation (21%)
- because they are a cost-effective resource (20%).

More altruistic motivations such as to support government policy (12%), corporate responsibility (12%) or to increase the number of nationals in our workforce (13%) featured much lower down the list, as seen in Figure 15.

Figure 15: What are your organisation’s MAIN motivators for proactively recruiting young people? (%)



N=786

Nationalisation is a key motivator in certain segments

- Eight in ten organisations in Saudi Arabia are looking to hire full-time or offer short-term opportunities to youth.
- This higher focus on youth recruitment in Saudi Arabia tends to be with the objective of increasing the representation of nationals in the workforce (18%), and supporting government policy/regulation, for example Nitaquat and the soon-to-be-launched Guided Localisation scheme (17%). This compares with only 11% of organisations in the UAE citing nationalisation as a main motivator in hiring youth.

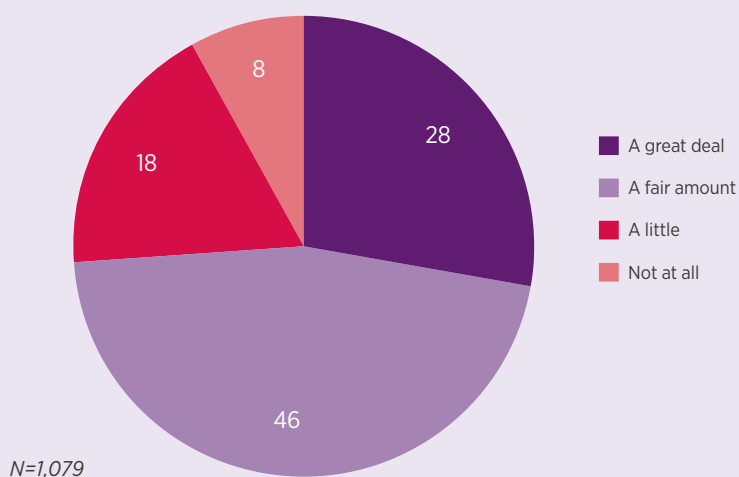
Larger organisation with bigger HR teams more likely to actively recruit youth

- Larger organisations with more than 1,000 employees tend to cite recruitment of nationals as a major motivator to hire youth (19%) compared with 11% for small and medium-sized organisations.
- As may have been expected, organisations with a larger HR/L&D function are significantly more likely to actively recruit young people and offer internships to young people, as are the bigger companies with 5,000+ permanent employees (67% recruit young employees and 43% offer internships).

Influence of customer demographics

- Thirty-four per cent of respondents feel that changing demands and demographics of customers will be the workforce trend that will have the most significant impact on their organisational workforce strategy over the next five years (as seen in Figure 10).
- Eight per cent of companies cite the need to reflect their customer base as a top motivator to hire young people (as seen in Figure 15).
- A majority of companies surveyed (74%) indicate that the demographic profile of their customers influence their hiring decision either a great deal (28%) or a fair amount (46%), as seen in Figure 16.

Figure 16: How much does your customer demographic profile influence your hiring decisions and workforce planning? (%)



Alongside increasing female inclusion, with one-third to one-half of the GCC population under 25 years of age (AIMunajjed and Sabbagh 2011) these younger generations will increasingly be reflected in the region's dominant consumer groups and these findings suggest that organisations are starting to recognise the impact of this on their workplace strategy and workforce design.

What are the youth looking for?

One of the often referenced trends in the future of work is the move to a more contingent workforce and this is evidenced through the surge in popularity of organisations such as Upwork, which has a 12-million-strong workforce of remotely based freelancers. However, a UAE-based survey of 2,319 students and graduates conducted by InternsME demonstrates that youth highly value growth opportunities within organisations over salaries and recognisable brands when considering applying to internships (InternsME 2016). This raises the challenge for organisations in the region to balance the need for a flexible approach to resourcing while meeting the expectations of growth and opportunity from the leaders of the future in order to attract and retain talent. 'We

need to think more holistically about career growth rather than traditional hierarchical progression and give employees opportunities for a breadth of diverse experiences and opportunities that maximise their skills and their employability going forward' (CIPD and CEB 2016).

Work-readiness of young people

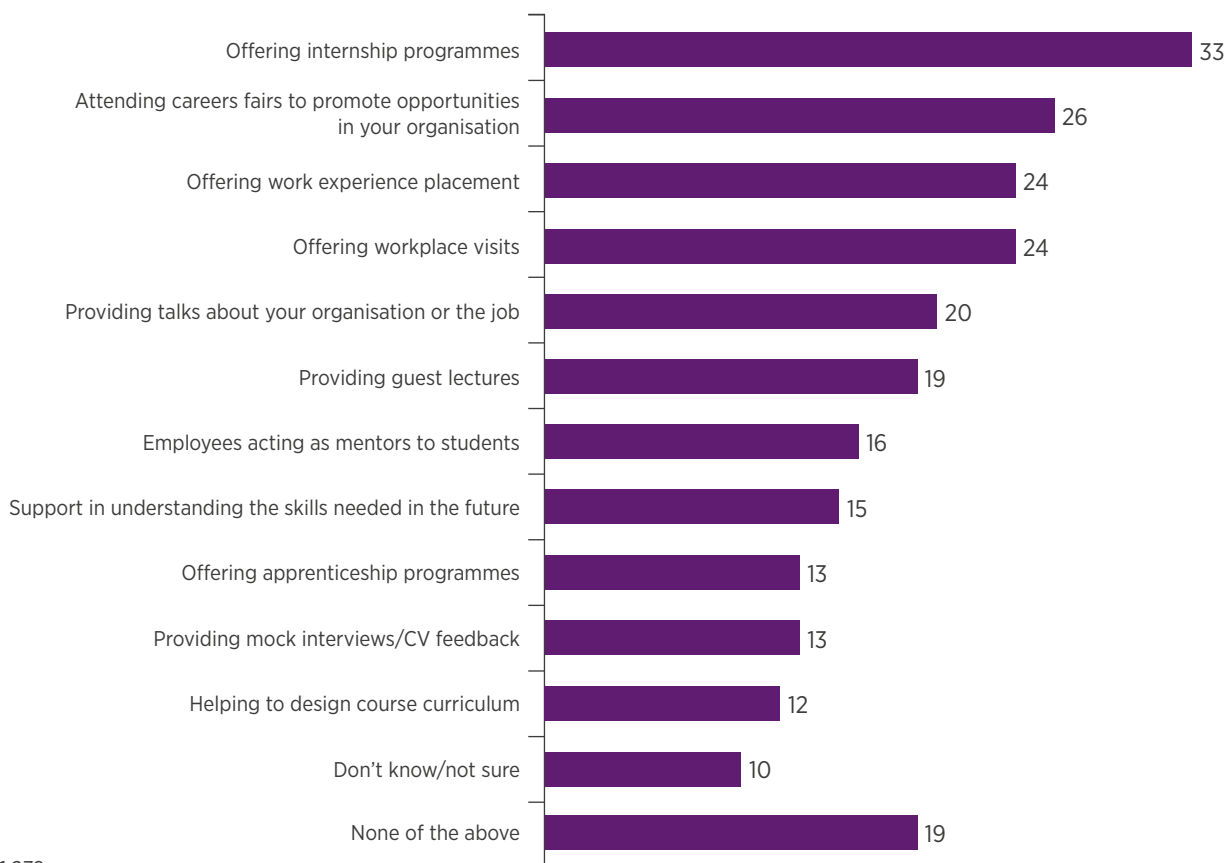
A recent survey of Arab youth indicates that young people across the region are leaving higher education unprepared to enter the workforce, with 80% of fresh graduates claiming college did not help them identify or apply for suitable job opportunities (INJAZ Al-Arab and Bayt 2016). This is further supported by the study from InternsME, which found that 52% of 2,319 respondents felt that their university did not

focus on employability. As these statistics demonstrate, the need for companies to collaborate with education institutions in order to develop their future talent pipeline is evident.

As illustrated by Figure 17, the top ways in which respondent organisations collaborate with educational institutions to improve the work-readiness of young people are:

- offering internship programmes (33%)
- attending careers fairs to promote opportunities in their organisation (26%)
- offering work experience placements (24%)
- offering workplace visits (24%)
- employees providing talks about the organisation or the job they do (20%).

Figure 17: Over the last 12 months, has your organisation worked with educational or government bodies on any of the below to improve the work-readiness of young people? (%)



N=1,079

While some organisations across the region have started partnering with educational and/or government bodies to improve the work-readiness of young people, more can be done, with one in every five surveyed (19%) stating their company has not engaged in any of the activities listed, and 10% of respondents unsure of their organisation's efforts in this area.

Results suggest organisations in Saudi Arabia tend to be more proactive on this front, being significantly more likely than those in the UAE to offer internship programmes (37% vs. 29%, respectively) as well as guest lecturers (23% vs. 18% in the UAE). Indeed, those in the UAE were significantly more likely than those in Saudi Arabia to confirm their organisations were not investing in any collaborative activities to prepare the workforce of the future for the world of work (22% vs. 16% for Saudi Arabia).

Unsurprisingly, given the regional governments' focus on youth education and employment, the government sector is significantly more likely to offer internship programmes (51%).

When looking more widely at how organisations are looking to develop critical skills for its employees, 30% of respondents are favouring training programmes run by internal experts and 16%

are using internal mentoring programmes to disseminate the required skills. This demonstrates a positive trend towards utilising existing internal expertise and knowledge to upskill the workforce of the future; it could be argued this also supports the desire of younger generations to learn from their more experienced colleagues. In their 2015 research, Ashridge Business School found that 'Generation Y' recognises and values the importance of older colleagues' experience in helping them succeed in their career (Schofield and Honoré 2015). The importance of not only attracting but also developing the region's leaders of the future remains paramount and there is significant opportunity for organisations to maximise the value of a multigenerational workforce in their approach.

With increasing numbers of young people expected to join the region's labour market over the coming years, the talent landscape in the region will continue to alter at a dramatic pace. With this in mind, it remains critically important for organisations to consider how we prepare, attract, develop and retain younger generations in the workforce. As was indicated earlier, on average, only '69.3% of GCC nationals, as compared to 85.7% of expatriates, believe that their educational background has prepared them

well for their jobs ... the youngest nationals, those under 25 years, reported the lowest scores (62.5%)' (AON Hewitt 2012–2013, p16). This is not surprising when only 15% of survey respondents confirmed that they are working with education providers to design course syllabuses to meet their future workforce needs. Without active and engaged commitment from organisations to help revamp education provision to teach the relevant skills, knowledge and expectations of our regional workforce of the future, how can we ensure our educational programmes (and indeed our learning and development functions) are fit for purpose and are equipping individuals with the right skills to succeed?

At the CIPD we believe this has to be recognised as a responsibility for all in the region; it is essential that organisations play their role in working with educational providers and government entities to bridge the future skills gap and further develop the mechanisms that support and improve the work-readiness of young people. The need for an integrated strategy to drive this important agenda across the region is essential for us to collectively accelerate the change needed to ensure our organisations, countries and the region as a whole are ready to take on the challenges, and grasp the opportunities, that lie ahead.

Commenting on our research, Jean-Michel Gauthier from InternsME says:

'There are myths and biases officiating recruiting processes and talent development that need to be considered and reviewed by organisations across the region. We encourage all employers to start paying more attention to how junior roles are structured within their organisation. Offering an attractive salary from a recognisable brand is not necessarily enough to attract top talent without internal structures in place that encourage upward mobility. The youth in the region are looking for security and organisations they can grow and learn within. Employers that have relatively flat organisational structures need to focus on involving their junior employees in corporate goals and helping them understand how their work impacts targets. Other recent surveys have shown that the benefits of empowering youth within organisations is not limited to just attracting top talent, but also improves other damaging workforce issues such as high attrition and talent shortages and also leads to healthy talent pipelines when looking to fill mid-to-senior roles.'

Women in the workplace

'The rationale for encouraging improved representation of women in the workplace goes far beyond an organisation's CSR mission and is underpinned by a sound business case' (CIPD 2015b).

This perspective is reinforced by evidence-based research, such as McKinsey's 2015 study, which found that *'companies in the top quartile for gender diversity are 15 percent more likely to have financial returns above their respective national industry medians'* (Hunt et al 2015). Having a gender-balanced board is associated with better economic performance and sustainability (Credit Suisse 2014).

In their 2014 research, Gallup concluded that gender-diverse teams perform better than single-gender teams for several reasons (Bharadwaj Badal 2014):

- *'Men and women have different viewpoints, ideas, and market insights, which enables better problem solving, ultimately leading to superior performance at the business unit level.'*
- *'A gender-diverse workforce provides easier access to resources, such as various sources of credit, multiple sources of information, and*

wider industry knowledge.'

- *'A gender-diverse workforce allows the company to serve an increasingly diverse customer base.'*
- *'Gender diversity helps companies attract and retain talented women. This is especially relevant as more women join the labour force around the world. Companies cannot afford to ignore 50% of the potential workforce and expect to be competitive in the global economy.'*

In the GCC, commendable efforts in the education of women have led to an increase in female literacy rates. For example, in the UAE, female youth illiteracy has decreased to 3% in 2007, down from 22% in 1980, and women represent 70% of UAE nationals in higher education institutions (AlMunajjed and Sabbagh 2011). *'A new report by alternative asset management firm, Al Masah Capital, called GCC Women—Entrepreneurs in New Economy, says an increase in literacy rates and educational opportunities, as well as changing cultural attitudes, is helping women set up and maintain successful businesses at an unprecedented rate'* (Tuxford 2016). Despite these achievements

in education, gender inequality in the job market remains an issue.

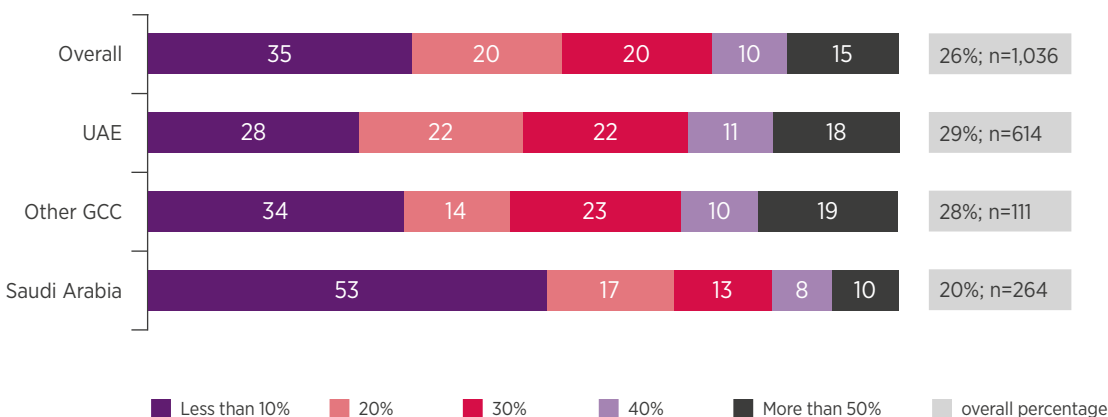
GCC workplace gender diversity below world average

The under-representation of women in the GCC workforce is confirmed by the results of this study. And while perhaps not surprising to many, when we examine the data in more detail we see there are some very positive trends and signs of significant change on the horizon. It will be interesting to monitor these numbers in coming years and see the extent and speed of change.

Responses indicate women make up approximately 26% (one in every four) of regional organisations' total workforce, against a global average of 40% (World Bank 2014). It is not surprising to note that the results are even more stark in Saudi Arabia, with women representing only 20% (one in five) of the total workforce, and over half the organisations confirming that women represent less than 10% of their total workforce, as seen in Figure 18.

Looking across industries, education (44%), healthcare (40%), advertising/marketing (36%) and government (31%) seem to employ women in larger proportions. Not

Figure 18: What percentage of your organisation's total workforce are women? (%)



surprisingly, construction (18%) and chemical/heavy industries (18%) have the smallest proportion of women in the workforce.

The proverbial glass ceiling

Globally, increasing the number of women at senior and executive levels is starting to influence the way organisations approach the identification, attraction and retention of talent. Businesses are increasingly focusing on how to maximise contribution from women at work. However, our findings reveal that the under-representation of women becomes even more accentuated when we look at their progression through to senior and executive roles, with women making up 21% (one in every five) of management or mid-management positions, 16% of senior management roles and 15% (less than one in every six) of organisations' executive boards. There are, however, signs of change, with 23% of respondents saying their executive board is made up of 30% or more women and 12% of respondents confirming 50% or more of their board are women (see Figures 19, 20 and 21).

It is interesting to note that further up the career ladder, the gender diversity levels of the countries become more convergent, and in fact are more comparable with global averages.¹ As the region continues to diversify into new industries (service and knowledge-based sectors), it needs to ensure better representation and diversity to build world-class industries that can compete on a global scale.

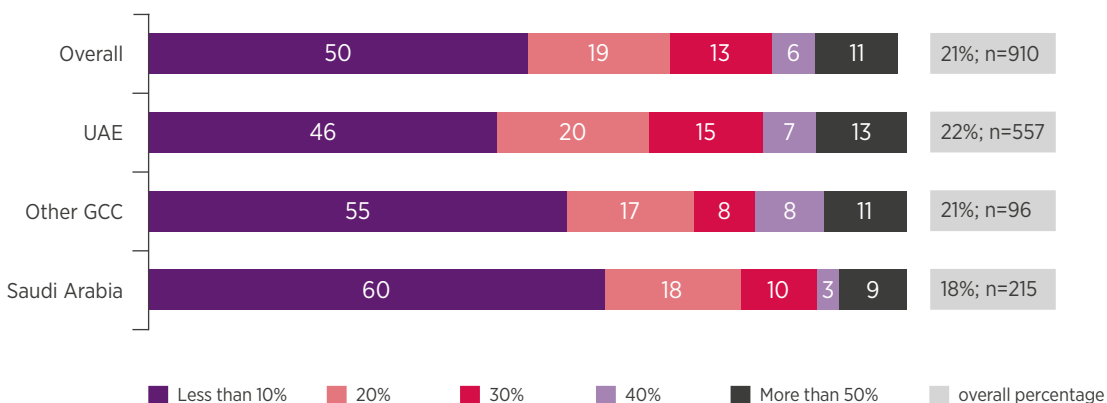
Interestingly, when asked how the number of women in senior roles in their organisations has changed in the past 12 months, while the majority have not seen any increase in senior management (64%) or executive board (65%) positions, 18% of organisations cited the number of women in executive board roles has increased. When we look across the region, we note that this increase is now happening region-wide - with a 14% increase in KSA, 20% in the UAE and 11% across other GCC states. The positive news is that the tide is turning across the region and organisations seem to be proactively bringing women into senior corporate roles.

It is well documented that in many countries across the Middle East, women graduates outnumber men, something that is not currently reflected in the gender diversity of the workforce. This suggests over the coming years the Middle East will need to continue to respond to an ever more increasing number of women entering the workforce. While gender diversity is a global challenge, it is important for organisations and HR teams to be cognisant of cultural and social specificities of the region in order to attract more women into the workforce, and create opportunities for their advancement.

Efforts to increase women in the workforce

'The CIPD has always advocated a voluntary approach to increasing diversity, to enable organisations to develop an appropriate and sustainable range of responses in how they develop female talent and effect cultural change' (CIPD 2015b, p3). For this reason, the survey also explored respondents' views about female progression at work and the kind of practices that organisations in the region have put in place to encourage gender diversity.

Figure 19: What percentage of your organisation's management or mid-management roles are currently occupied by women? (%)



¹ Internal analysis conducted by YouGov in 2016.

Figure 20: What percentage of your organisation's senior management roles are currently occupied by women? (%)

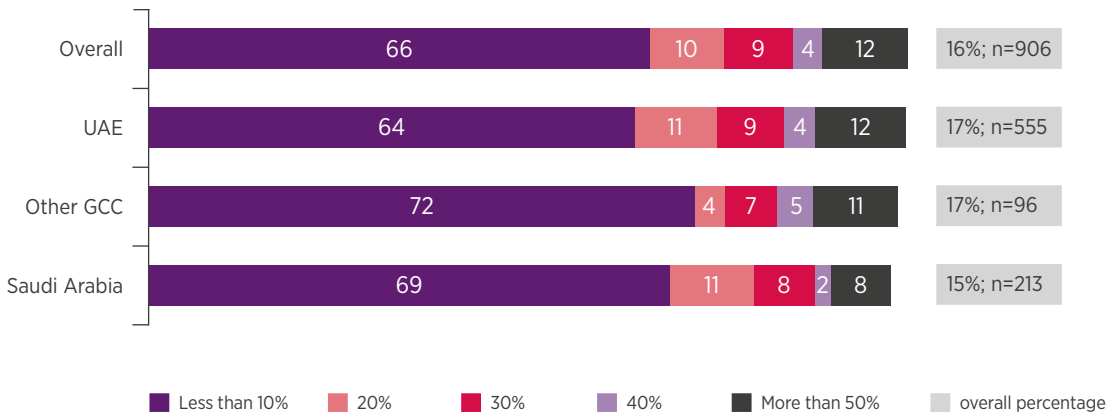
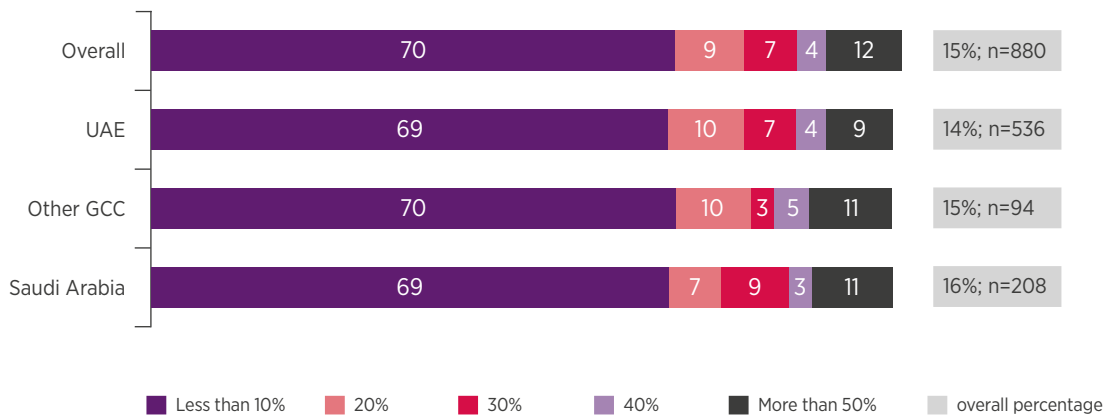
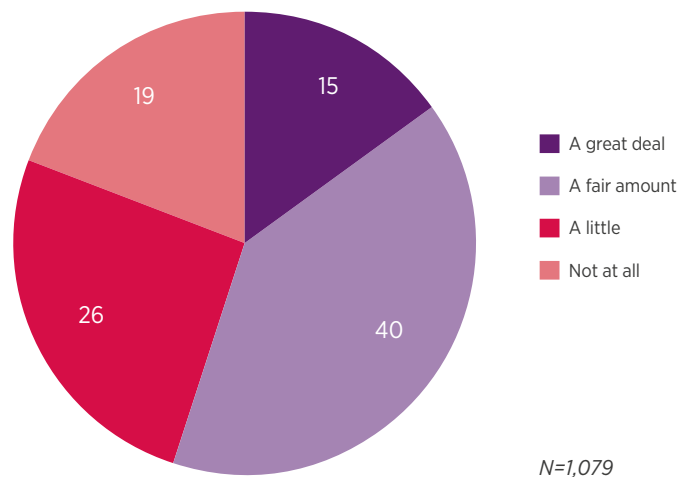


Figure 21: What percentage of your organisation's executive board are women? (%)



The study clearly indicates that under-representation of women in the workforce is being acknowledged, and over half (55%) of the respondents state that proactive efforts are currently being undertaken to improve gender diversity. Only one in five organisations confirm that there are no proactive initiatives taking place in their business, as illustrated by Figure 22.

Figure 22: How much is your organisation proactively trying to increase the number of women in management and leadership roles across the GCC? (%)



In August 2016, on the occasion of Emirati Women’s Day, Abu Dhabi National Oil Company (ADNOC) announced three women empowerment pledges (ADNOC 2016). They announced they will seek to appoint one female CEO across their group of operating companies. They set a target to ensure 15% of their senior managers will be women, and added a third goal of increasing the number of new Emirati women recruits to 30% by 2020. They also committed to creating a gender policy framework, setting up ADNOC’s first women’s network, and a women’s leadership development programme.

Some positive progress in the region is also demonstrated by examples from survey respondents of specific activities undertaken in their organisations to support

the progression of women. The most cited are providing training/ learning/seminars/lectures (14%), with other examples including:

- Providing more opportunities for women (10%)
- Greater support/mentoring/ encouragement (8%)
- Flexible working hours/working opportunities (5%)
- Development programs (5%)
- Providing good working environment/working conditions (3%)

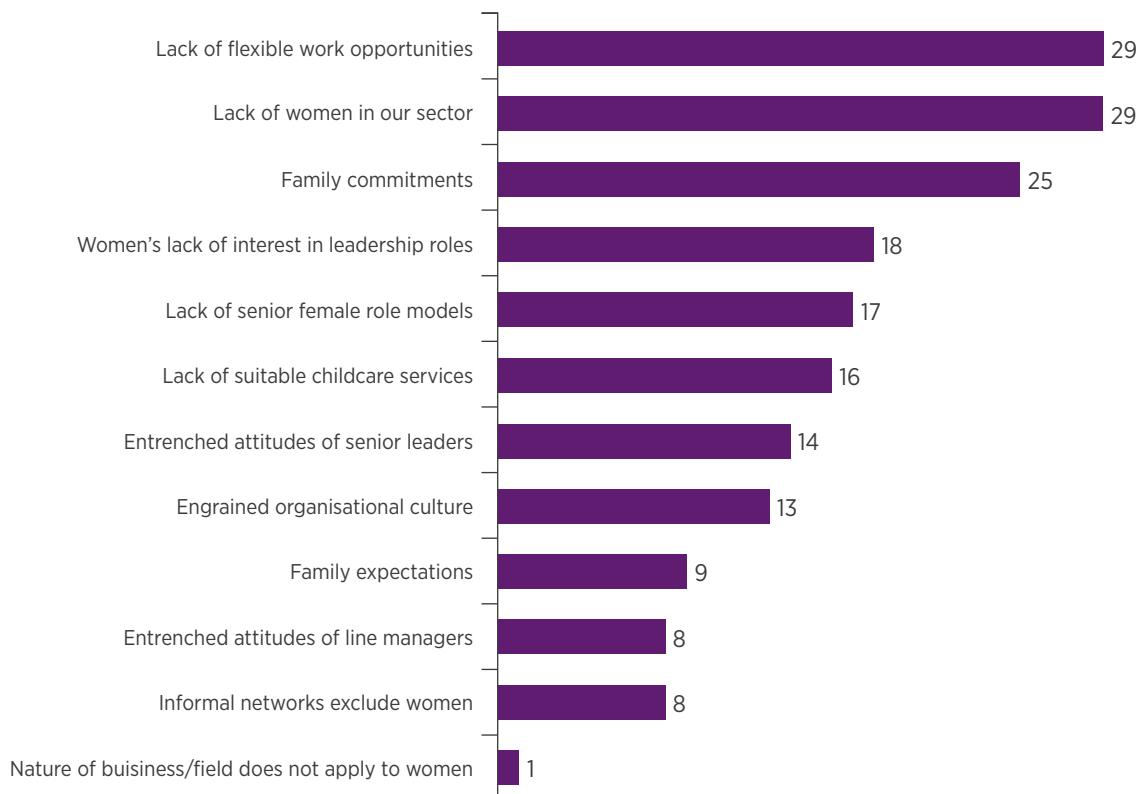
Despite the positive movement, results suggest more can be done, with 16% of those surveyed confirming their organisation is doing nothing to support the progression of women and another 5% unsure what their company is be doing (if anything).

In analysing this trend further, we asked respondents to highlight the most significant issues impacting the ability of organisations to increase the representation of women in the workforce. As illustrated by Figure 23, the results suggest that factors relating to personal commitments and priorities are often a challenge in supporting women in the workforce to progress. Indeed, the following emerged as the biggest obstacles:

- lack of flexible work opportunities (29%)
- lack of women (talent/skills) in our sector (29%)
- family commitments (25%).

In addition, entrenched attitudes of senior leaders (14%), engrained organisational culture (13%) and lack of senior female role

Figure 23: What are the biggest obstacles your organisation currently faces in supporting women to progress? (%)



N=1,079

models (17%) are also often cited as major obstacles that need to be addressed while providing more opportunities to women to develop in the workplace. It is also interesting to note that both engrained organisational culture (18% vs. 13%) and lack of senior female role models (21% vs. 17%) are more pronounced in Saudi Arabia.

Although the challenges are clear, the solutions will require more than the efforts of a single organisation. There is no quick or one-size-fits-all approach for all organisations. Legislation such as equal pay for equal work, a recent decree in the UAE aimed at encouraging companies to appoint more women to their board of directors (Securities and Commodities Authority

2015) and the creation of a new committee under the guidance of the UAE Gender Balance Council to review the role of women in the workplace (Williams 2016) are steps in the right direction and provide the regulatory framework for greater gender equality in the GCC workplace.

While the survey results demonstrate there are efforts being made across the GCC to increase female participation in the workplace, progression of women to senior and executive roles requires a strong and sustainable framework to recruit and develop women at every stage of their career. In the book *Game Changers: How Arab women are changing the rules and shaping the future* (Jones et al 2016, p33), the authors warn that ‘female friendly

policies may help get women into the work place but do nothing to encourage them to aim higher and board quotas do not strengthen the career ladder for women on the whole’. Our recommendation is that employers across the GCC take a holistic approach to building a strong and sustainable female talent pipeline, developing multiple supportive and inclusive strategies that impact women across the workforce.

Commenting on our research, Raeda Al Sarayreh, Steering Committee Member of the 30% Club GCC, says:

‘There is no doubt that gender parity within the leadership of organisations increases performance, top- and bottom-line growth and score high on organisational effectiveness. Both the corporate and government sectors in the GCC recognise the impact of having increased participation across the workforce and it is evident in government policies and the significant increase in women across senior government posts within the GCC. The corporate sector is still lagging behind despite modest advancements. This report is another proof point of the need to accelerate the pace of change and consciously work on creating a cultural shift within organisations in support of more representation of women in senior roles.

‘At the 30% Club GCC, we are working in collaboration with business leaders, government entities, and the education sector, who strongly believe that gender diversity is a business case. We work collaboratively through working groups to create and run a number of initiatives across education, talent acquisition, research, awareness and mentoring to support a healthy pipeline of talented women in the workforce. Critical to our efforts and approach is the cultural shifts on how leaders approach gender parity and increased women in senior roles and on boards.’

Employee health and well-being

Prioritising the health and well-being of employees within the business agenda has been growing in recognition and importance in recent years. While there are many ways to define employee well-being, the CIPD defines it as ‘creating an environment to promote a state of contentment which allows an employee to flourish and achieve their full potential for the benefit of themselves and their organisation’ (CIPD 2016a). The changing nature of work, the workforce and the workplace is making a focus on individual well-being even more critical to broader organisational health and sustainability.

As well as benefitting employees, much recent research has contributed to the understanding that a content, healthy and engaged employee is beneficial to

a business, not just in terms of less tangible ways, such as improved morale or loyalty, but also direct bottom-line benefits, such as improved productivity, profitability, minimising absenteeism and reduced staff turnover costs (CIPD 2016a). *The American Psychological Association estimates that more than \$500 billion is lost from the U.S. economy because of workplace stress, and 550 million workdays are lost each year due to stress on the job*’ (referenced in Seppala and Cameron 2015). And the *Harvard Business Review* found that businesses who take care of their employees can expect to see up to a 31% increase in productivity and up to a 37% increase in sales (Achor 2011).

With high workplace stress being acknowledged as a concern by employers in the region, employee well-being initiatives are on the rise in the GCC (*Khaleej Times*

2015). According to a survey of business managers in the UAE carried out by Middle East business intelligence provider MEED, managing workload is by far the biggest cause of stress in the workplace (MEED 2016). Almost half of respondents (49%) said that workload was the main source of stress, with 24% saying that juggling work and personal life was the main factor. Other causes of stress include lack of job security (14%) and issues with colleagues (6%).

An articulated strategy on employee well-being is not commonplace in the GCC

Drawing from evidence from the CIPD’s past research (CIPD 2016a, p2), ‘we know that there exists a spectrum of employer practice, ranging from those organisations for which employee well-being doesn’t make it onto their agenda to those that offer

Figure 24: Which of the following describes your organisation’s approach to employee well-being in the GCC? (%)



N=1,079

well-being initiatives but may not support them in an integrated way through aligned leadership, people management and organisation culture. And then there's the minority of employers that are leading the way by seeing the well-being of their workforce as the foundation for their business, taking well-being considerations into account across every facet of their business.'

This picture is reflected in this regional research, as illustrated by Figure 24. The study found that the majority of the companies surveyed have a focus on well-being to some degree, with only 10% of respondents stating they are currently not doing anything to focus on employee well-being. However, the survey indicates that while the importance of the well-being agenda is recognised by organisations in the region, the approach taken to support this

agenda is somewhat reactive and flexible as opposed to being part of a proactive, planned strategy. Only 14% stated they have a standalone strategy for health and well-being and only 19% consider health and well-being an integral part of their people strategy. While a promising 24% of respondents state that well-being is taken into consideration in all business decisions, 21% confirm that operational demands take precedence over well-being considerations.

As shown in Figure 25, the most common ways in which organisations strive to improve employee well-being are by focusing on improving relationships at work (34%), offering personal development opportunities (33%) and offering benefits such as health insurance (44%). Of these, the top initiative (provision of health insurance)

is mandated by government regulations across much of the GCC, which causes us to question how much this is driven by the regulatory requirement as opposed to being reflective of a conscious prioritisation by organisations.

Figure 25: What is your organisation focusing on the most to improve employee well-being? (%)

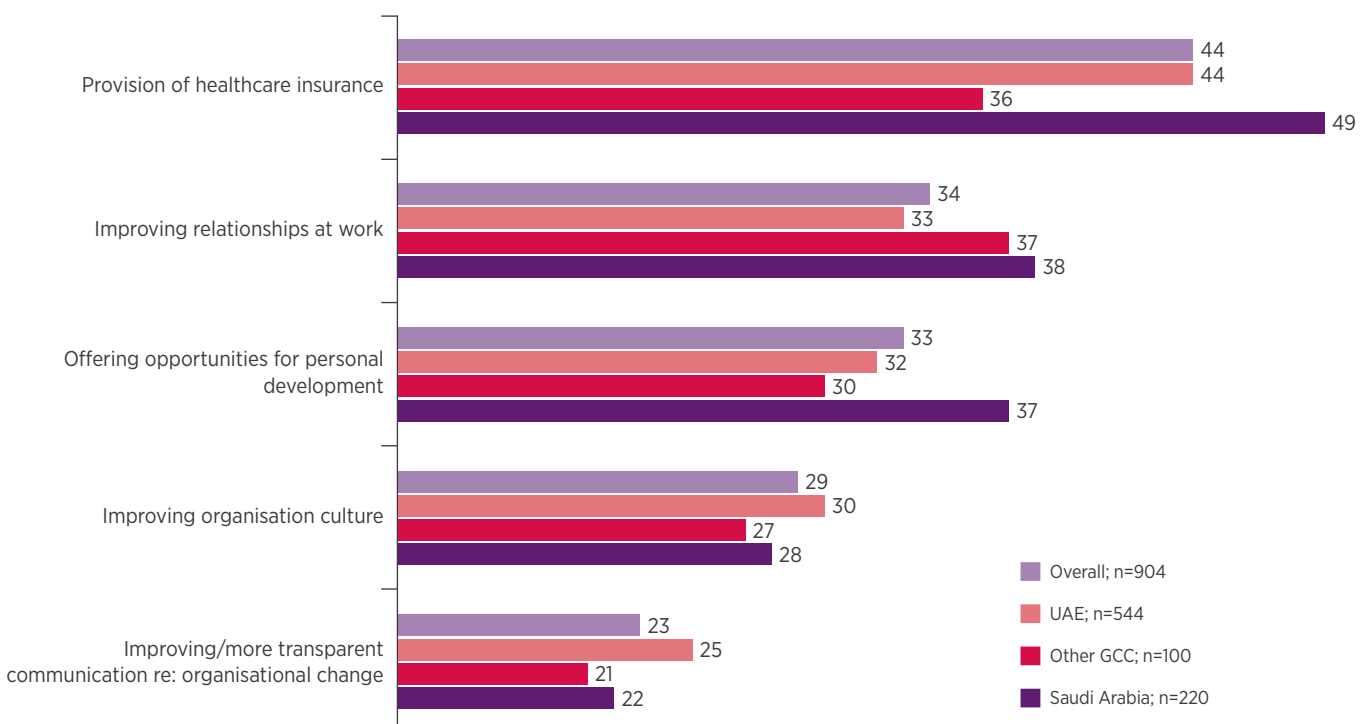
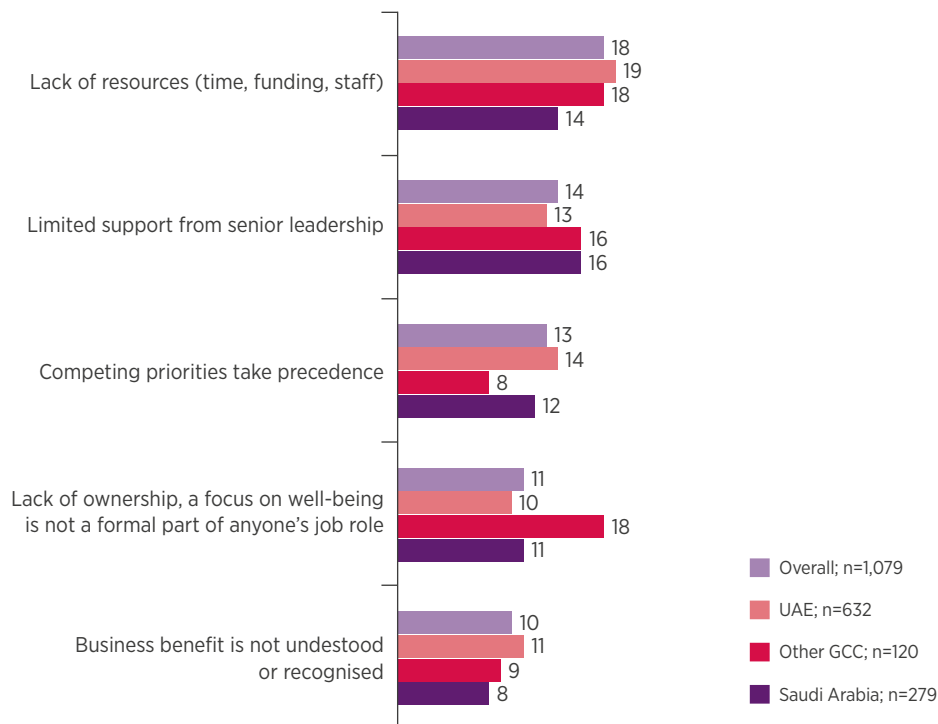


Figure 26: What is the main barrier to your organisation investing more in employee well-being? (%)



A better recognition of the 'return' on investments in employee well-being required

Despite these factors, it is encouraging to note that 30% of respondents confirmed their organisational investment in well-being initiatives has increased in the past 12 months and only 12% confirm their organisations do not spend anything on well-being. This indicates positive progression across the region. However, the study confirms, as illustrated by Figure 27, that too few organisations evaluate the organisational impact of their health and well-being activities, with only 35% of organisations that invest in employee well-being having a formal mechanism to measure the ROI, or the value they receive in return.

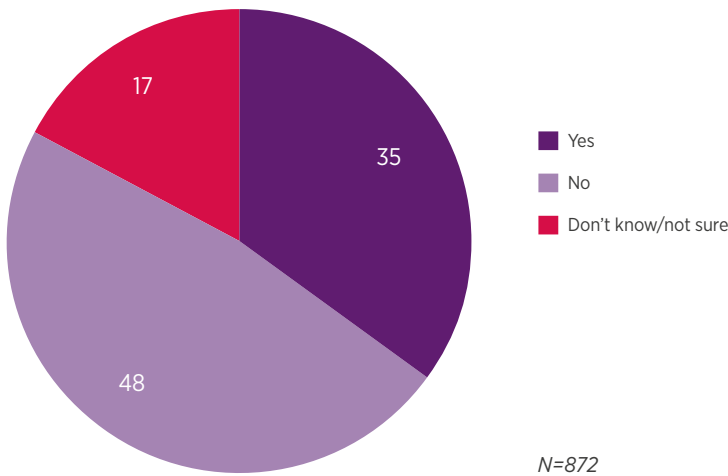
When probed further on the current practices on measuring return on investment, it is clear

that there are no standard frameworks or benchmarks being used by organisations. Most organisations rely on employee satisfaction surveys or make correlations to factors such as number of sick days taken by employees. A few respondents also mentioned measuring increase in productivity and/or performance of employees, but it remains unclear whether a quantifiable link between the investment in well-being and these factors is clear and/or measurable. It is vital that HR practitioners monitor and report on a range of health, employee satisfaction and organisational measures to build a strong case to convince senior management of the need for ongoing financial commitment to health and well-being (CIPD 2016a). Human capital reporting has a vital role to play in helping organisations to measure, report and benchmark the health and

well-being of their people, and the CIPD's Valuing your Talent research (CIPD 2014) provides a framework to encourage accountability by enabling organisations to develop and monitor indicative metrics and outcomes for employee well-being and engagement.

When considering the business case, the simple premise that a workforce in a good state of health and well-being must surely contribute to enhanced business outcomes should be a driver for organisations to take action (CIPD 2016a, p6). However, the results of the survey indicate a need for better measures of 'return' on well-being investments, so that the business case for them can be more strongly articulated and communicated. Overcoming some of the barriers listed above will rely on a business case that is context-specific and based on the unique outcomes that are

Figure 27: Does your organisation calculate return on investments in employee well-being? (%)



beneficial and relevant to the specific organisation for which the business case is being developed. The CIPD's well-being research (CIPD 2016a, p7) recommends that *'convincing senior management to integrate well-being throughout the business may need to start with a pilot area or by highlighting pockets of good well-being practice that already exist, and the organisational benefits that can be realised. However, there is another perspective on why employers should take action to improve the health and well-being of their workforce, aside from the mutually beneficial impact it could have for employees and the business, which is that it's the right thing for enterprises in the twenty-first century to do for their people and for wider society.'*

The survey results suggest that while there are some pockets of good practice and some evidence of forward-thinking organisations across the GCC, many have not yet fully embraced the well-being agenda to achieve sustainable long-term organisational benefits. It is clear that organisations are at

very different stages of maturity in understanding what 'good practice' employee well-being strategies should include.

In the Middle East region, the UAE has some outstanding case studies from international and local companies who are leading the way for corporate health and wellness. Winners of the 2015 MEED's Daman presents Corporate Health Awards, which recognises the top employers in the UAE for their commitment and success in corporate health, include: DHL, Dubai Holding, Knowledge & Human Development Authority and Unilever.

Well-being strategies are evolving and traits of great programmes in the region include:

- huge levels of executive sponsorship and full workforce ownership and participation – this is just part of the way business is done (culturally ingrained)
- metrics-led – with robust employee and business indicators at the heart

- depth and breadth – physical health, physical safety, medical advice and measures, nutritional guidance, mental health support, opportunities for personal growth, flexible working, family-friendly philosophy, working environment – integrated implementation
- engaging – the well-being interventions create internal communities (face-to-face and digital), camaraderie and sometimes healthy competition
- communications – all supported through robust communications and a strong internal brand.

Organisational approaches often tend to comprise one-off interventions, which means there is still considerable scope for more integrated implementation of well-being initiatives in workplaces across the GCC. The CIPD views the HR profession as the key enabler in unlocking the potential for a much wider and more sustainable integration of health and well-being practices at work.

Flexible working

'Flexible working' describes a type of working arrangement which gives a degree of flexibility on how long, where, when and at what times employees work. There are multiple aspects of flexible working, including: part-time working, flexitime, job-sharing or working from home. Flexible work options are not only good for employees, but for employers and companies as well.

Previous CIPD research summarised in the *Flexible Working* factsheet (CIPD 2016b) demonstrates that flexible working leads to direct and indirect business benefits. *'The direct business benefits are associated with savings on the real estate, for example, facilitated by*

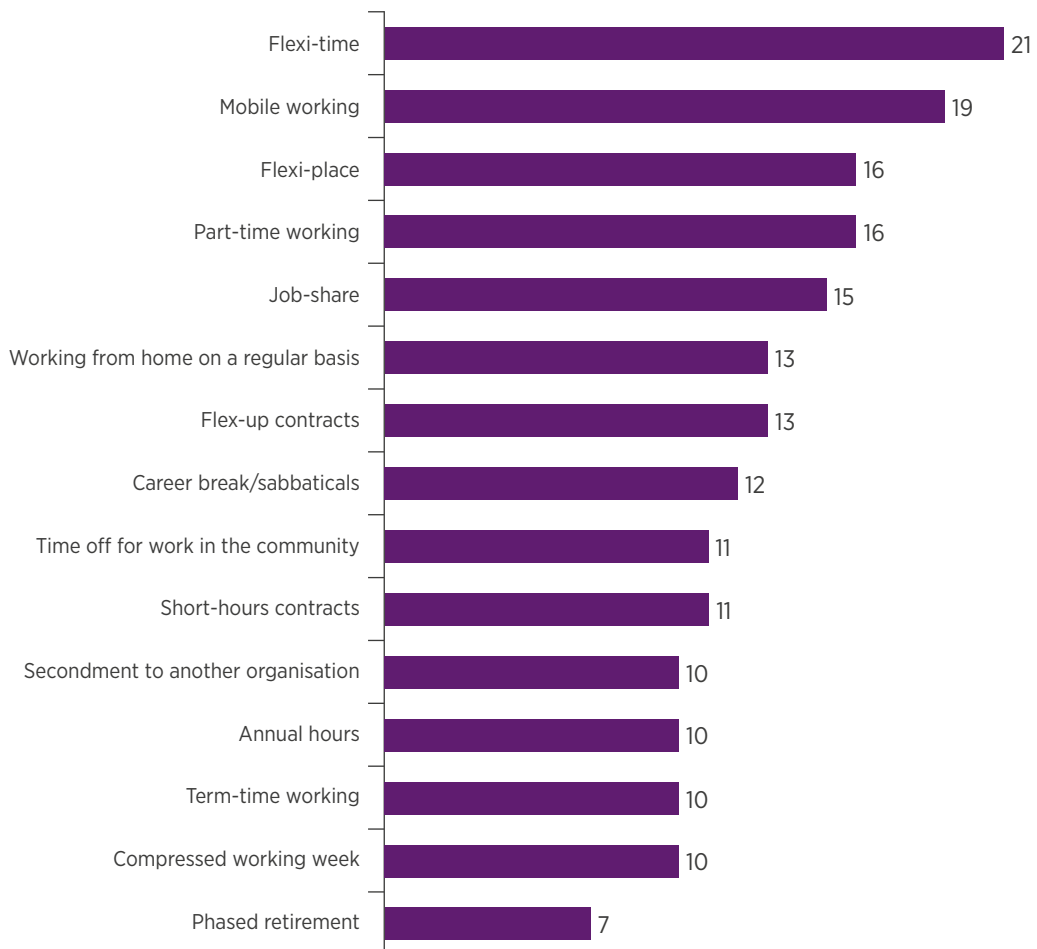
the technological advances that allow remote working and hot-desking arrangements. Indirect business benefits are achieved through an improved employee psychological contract, increased employee engagement and attraction of new talent.' A study, 'The Flex Factor', in 2015 found that *'UK companies could potentially save up to £34 billion by opting for flexible working hours and freeing up desk space'* (Al Hinai 2014). In addition, flexible working allows a better match of business resources with the demand for services, for example, to deliver service to customers on a 24/7 basis. In a 2016 RICS survey of over 500 Middle East employees (Nunnington and Haynes 2016, p5), *'75% said they needed*

more flexibility in their working environment to be more productive and Generation Y respondents indicate that activity based working is their most preferred office layout.'

Flexible working practices are increasing among GCC organisations

This study finds that a significant number of organisations in the GCC do offer some form of flexible working arrangements. In fact, 27% of respondents say their organisations have increased their flexible working practices within the region over the last 12 months, indicating a current positive trend towards making access to flexible working more widespread regionally.

Figure 28: Which flexible working practices does your organisation currently offer? (%)



N=1,079

However, not all organisations are embracing the trend, with 25% (one in four) of respondent organisations offering no flexible working options to their employees.

For the organisations that offer flexible working, Figure 28 shows the most commonly offered arrangements:

- flexitime (ability to choose the start and finish time within core hours) (21%)
- mobile working (for example using a laptop to work from another location) (19%)
- flexi-place (option to work from home some days a week) (16%)
- part-time working (16%).

It is also encouraging to see in Figure 29 that smaller companies across the region are embracing the trend of flexible working. Sixty-six per cent of organisations with over 1,000 employees offer flexible working, as compared with 80% of organisations with 100–1,000 employees and 77% of organisations with fewer than 100 employees.

While there are encouraging signs across the region, the study also clearly indicates that the range of flexible work arrangements in place across the region are still relatively limited. In future we can expect to see the most progressive organisations reviewing their

flexible working proposition with the aim of tangibly delivering competitive advantage – as we know, introducing the right choices can directly impact the attraction and retention of the best talent.

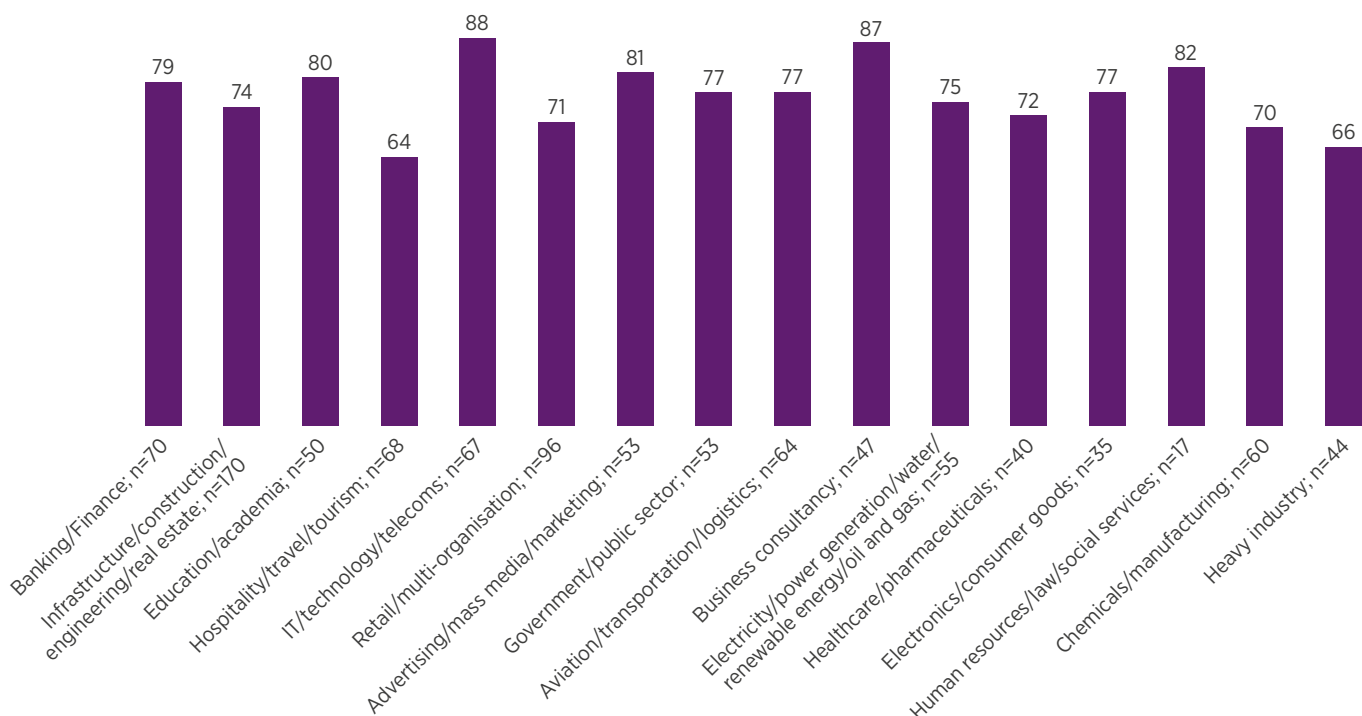
Sector view

It can also be noted that certain industries, such as education/academia (80%), IT/technology/telecoms (88%), business consultancy (81%), HR/law/social services (87%), and advertising/mass media/marketing/PR (81%) are also more likely to offer flexible work arrangements (see Figure 30).

Figure 29: Percentage of organisations offering flexible working options to employees, by size of the organisation



Figure 30: Percentage of organisations offering flexible working options to employees, variances by industry (%)



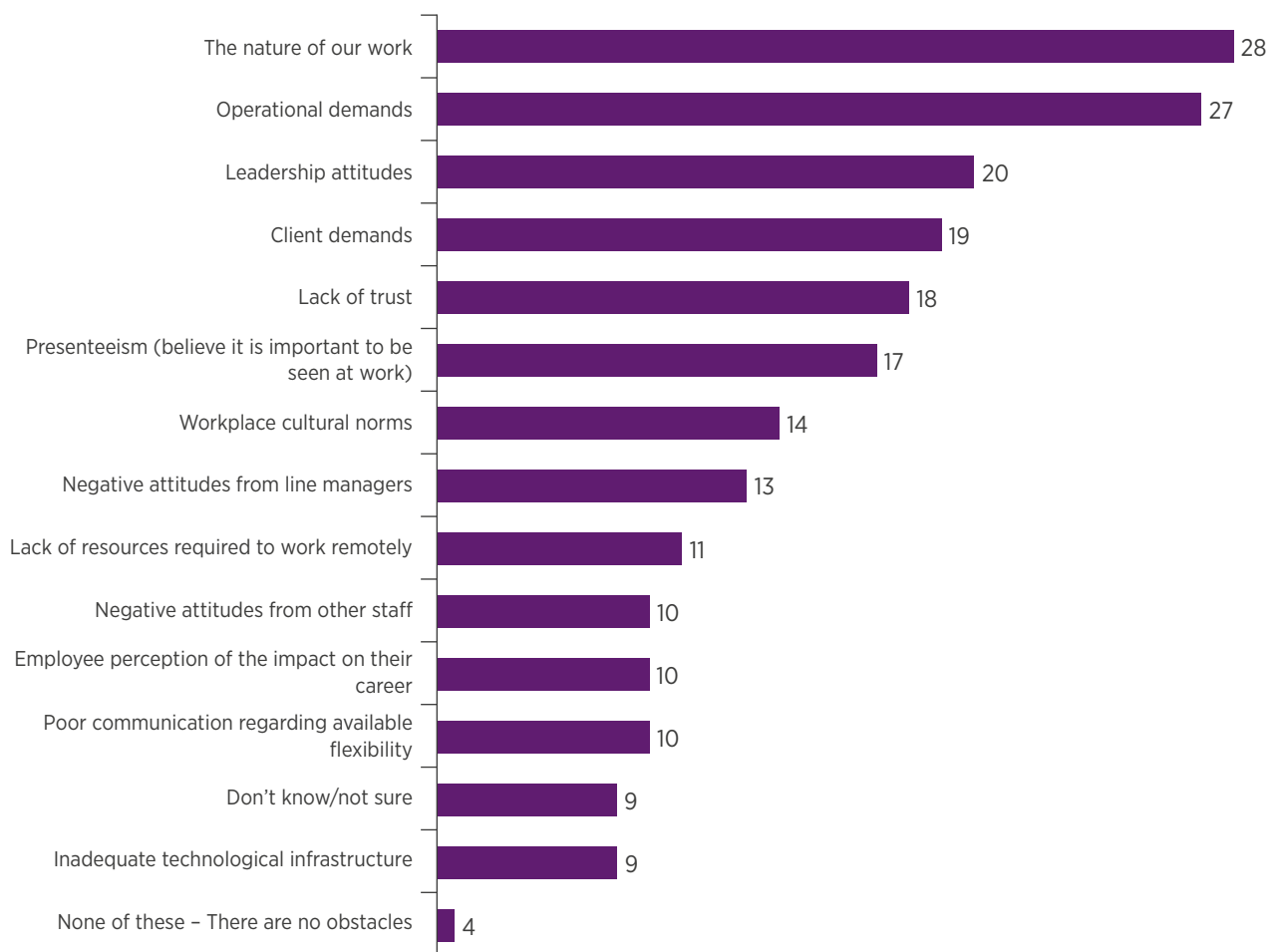
Organisational culture a major factor in making flexible working more widespread

The survey further probed into potential barriers in offering more flexible working options. Even though the top reasons stated for not increasing flexible working relate to the nature of the business, that is, the nature of our work (28%) and operational demands (27%), many respondents also point to factors that are more related

to organisational culture and how flexible working may be perceived by either leaders or the employees themselves, as illustrated by Figure 31. Effectively communicating and implementing flexible working is likely to require effort and energy and so it is not surprising that obstacles such as leadership attitudes (20%), lack of trust (18%), presenteeism (17%), workplace cultural norms (14%) and negative attitudes from line managers (13%)

were cited as barriers to providing or increasing flexible working arrangements in workplaces in the region. This points to the need to ensure that attitudes towards flexible working within the company continue to evolve in line with the provision of any flexibility initiatives so that they become embraced as an accepted part of organisational culture and ways of working.

Figure 31: What are the biggest obstacles your organisation faces to providing or increasing flexible working arrangements? (%)



N=1,079

The CIPD *Flexible Working* factsheet (CIPD 2016b) gives some recommendations to help implement flexible working effectively:

- ‘establish a clear process for flexible working’
- ‘ensure that there are defined roles and responsibilities for employees, line managers and HR’
- ‘assess the current level of support offered to line managers and ensure its sufficient’
- ‘invest in ongoing communication and awareness-raising’
- ‘assess how supportive organisational processes are of flexible working, for example, performance measurement and management, recruitment and job design’
- ‘assess how conducive the organisation culture is to flexible working – and take action accordingly’
- ‘make use of pilots when introducing new initiatives, and trial periods for individual flexible working arrangements to highlight potential problems’
- ‘build in opportunities and mechanisms to monitor and evaluate progress with flexible working’.

Workforce design is likely to undergo ‘evolution’ not ‘revolution’

The study finds that organisations in the region are not planning to make major changes to their workforce composition between full and part-time employees, or in the use of contracted or outsourced staff, over the next 12 months, as seen in Figure 32.

Opportunities for part-time work are not widely available in the region, with only 16% of respondents saying they offer such arrangements currently. Interestingly, 25% of respondents are actually expecting to decrease their part-time workforce over the next 12 months – which in itself is a concern.

Contract workers and freelancers are becoming a more popular option for organisations to access talent, with 27% of organisations confirming plans to increase their use going forward. The public sector indicates the highest propensity to do so, with 42% expecting to use more contractors and freelancers over the next 12 months. Forty-two per cent of respondents from non-GCC countries in the Middle East also

suggest they are expecting to increase the use of this flexible method of resourcing over the next 12 months.

While outsourcing looks set to decline in the region as a whole, and in Saudi Arabia in particular (30% of organisations indicate an upcoming reduction in outsourcing), certain sectors will be looking to increase their outsourced workforce. Banking/finance, government/public sector and HR/law/social services expect to outsource more to third parties, working either remotely or on company premises.

It is widely documented that the younger generations coming into the workforce now and over the coming years have expectations for a more flexible approach to their work and the workplace than has been the norm to date. The Deloitte 2016 millennial survey finds that when salary or other financial benefits are removed from the equation, work-life balance and flexible working, that is, remote working and flexible hours, stand out in the top three most important considerations when evaluating job opportunities (Deloitte 2016b). Employers in

Figure 32: Over the next 12 months, how do you expect the composition of your workforce to change for each of these groups? (%)



N=1,079

■ Increase ■ Decrease ■ Stay the same ■ Don't know/not sure

the GCC who want to win the war for talent should consider these findings when designing their workplace of the future.

We have already discussed that the role of women in the regional labour market will continue to grow in scale and importance, and have reflected on the benefits of more flexible working

arrangements to attract and retain women in the workforce. With the changing face of the regional workforce and increases in multigenerational and gender diversity, a more positive move towards offering flexible working arrangements will be critical to meet the demands and expectations of the workforce of the future.

Commenting on our research, Louise Karim, Managing Director at Mums@Work, says:

'It is encouraging to see a positive movement to creating gender parity in the GCC market; however, this being said, the findings of the survey indicate there is a lot further to go to achieve true equality in the workplace. Creating a balanced workforce not only maximises business efficiency, productivity and competitive advantage, but also creates a strong environment for growth and attraction of talent. Since launching Mums@Work, we have seen unprecedented interest from women who are highly talented with many years' experience in their chosen field, but not being able to find flexibility in roles within the region.

'We are working to encourage businesses throughout the UAE to embrace flexible and part-time working in order to welcome back this untapped talent of mothers after they have taken time out to raise their families. Flexible working needs to become the norm – welcoming part-time, job-sharing and remote working to attract and retain talent is only the beginning; companies need to support mothers with the return to the workplace through activities such as coaching, childcare support and female mentorship programmes.'

Impact of technology in the twenty-first-century workplace

Continued waves of technological change inevitably shape the economy and the nature of work. *‘Technological advances have revolutionised industries, changing the nature of tasks and the kinds of activities employees engage in’* (The Economist Corporate Network 2016). In a now well-quoted reality: *‘The world’s largest taxi firm, Uber, owns no cars. The world’s most popular media company, Facebook, creates no content. The world’s most valuable retailer, Alibaba, carries no stock. And the world’s largest accommodation provider, Airbnb, owns no property’* (McRae 2015).

Digitisation has increasingly brought about new ways of working and interacting. Facebook, LinkedIn, Instagram and Twitter haven’t just changed the way we create and share, connect, engage and promote ourselves. They have inspired new ways to recruit, develop, work and enable

ourselves and our organisations (Timms 2016).

In their 2016 global CEO survey, PwC finds that *‘85% of CEOs in the Middle East find technological change the most transformative of the global megatrends over the next five years; this was the highest in the world by some distance’* (referenced in PwC 2016a, p14).

Smartphone penetration in the UAE is 83% compared with a global average of 41% (all GCC markets are above 50%) (TNS 2015). In their review of global digital, social and mobile trends and statistics, We Are Social reported in January 2016 that *‘the pace of change is greatest in the Middle East, where the number of reported internet users grew a whopping 17%, up more than 21 million users in just twelve months’* (Kemp 2016). They go on to report that the UAE has 6.3 million active social media users (68% of the population) and Saudi Arabia has 11 million active social media users (35% of the population). Their research also finds *‘Qatar*

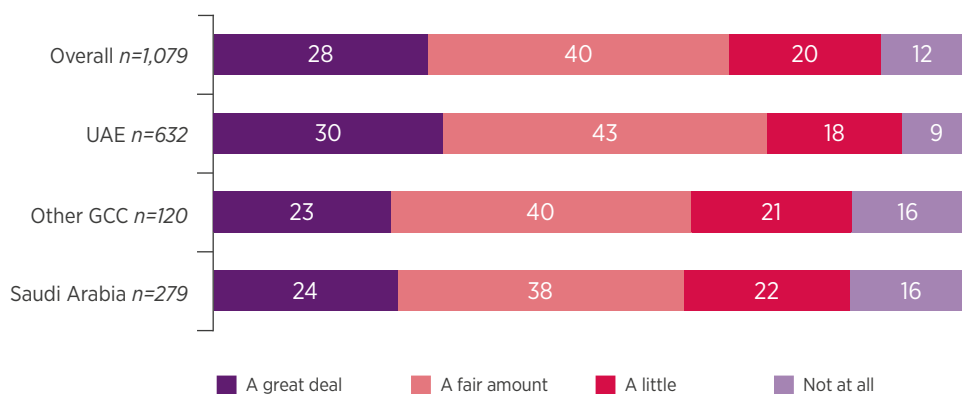
comes second highest in the global rankings for social media usage, with two-thirds of the nation’s population using social media via mobile devices every month’.

With among the highest Internet and smartphone penetration rates in the world, and a relatively young workforce, the adoption and influence of technology has the potential to significantly impact the future of workplaces in the GCC.

Technology expected to improve productivity, efficiency and quality

As seen in Figure 33, the study finds that at an overall level, 88% of respondents expect advances in technology to have an impact on their organisations in five years’ time. 85% of respondents expect the impact to be a positive one. Respondents from Saudi Arabia are slightly less positive (79%) and hospitality/travel/tourism (90%) are generally more positive in their outlook.

Figure 33: Looking five years ahead, how much do you think advances in technology will impact your organisation? (%)



As Figure 34 illustrates, the areas where technology is anticipated to have the greatest impact are: productivity (22%), efficiency (21%) and quality (19%).

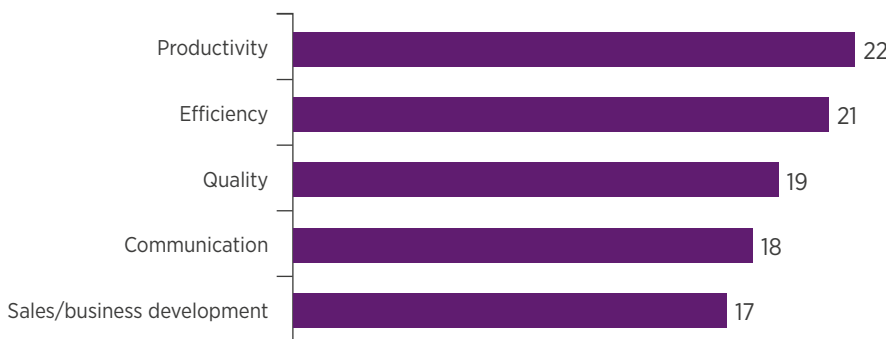
The organisational impact of technology is overwhelmingly expected to be positive, with very little variance based on industry

or age of respondents. A majority of respondents (83%) also expect technology to positively impact their employees in the future (see Figure 36). This is also more pronounced in the case of larger organisations, because of expected improvements in communications, efficiency and employee engagement.

The evolving role of social media in workplaces

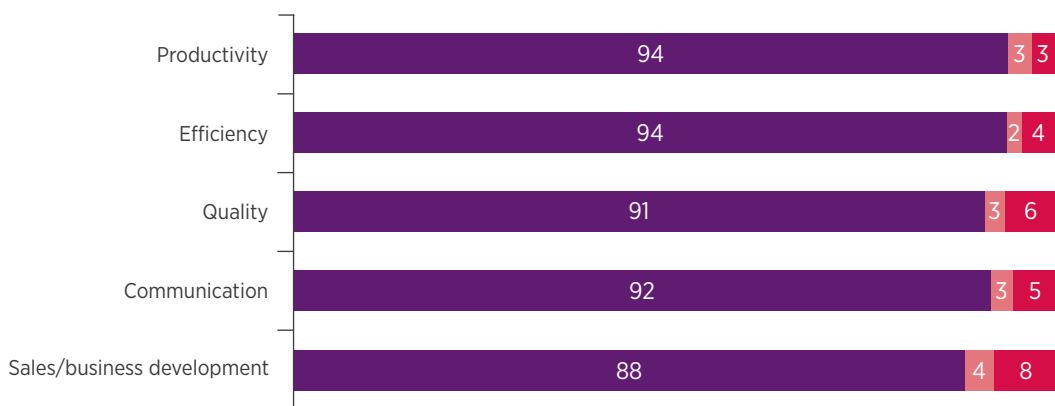
Over the past decade, social media has exhibited an exponential penetration into the daily lives of individuals, the operations of businesses, and the interaction between governments and their people. According to a recent YouGov study in the GCC, UAE

Figure 34: Which of the following will be most impacted by technological advances in your organisation over the next five years? (%)



N=920

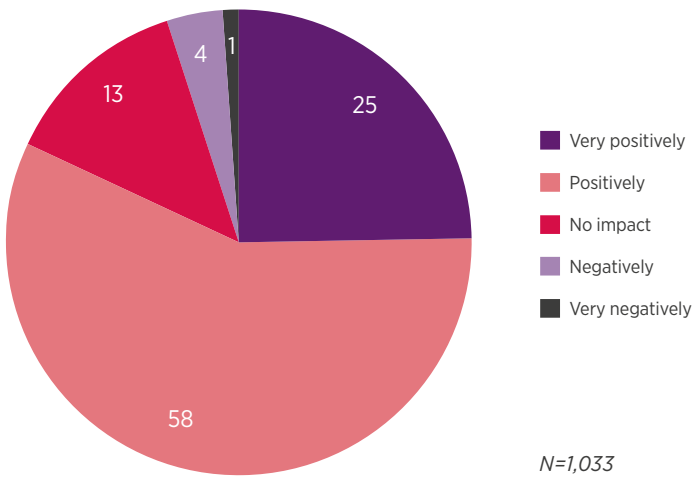
Figure 35: In your opinion, how will the TOP technological advances impact these dimensions in your organisation? (%)



N=316

■ Positive ■ Neutral ■ Negative

Figure 36: How do you think advances in technology will impact your employees? (%)



Skills of the future

There is no denying that technological change has fundamentally reshaped how we do business, enabling what is now being referred to as the Fourth Industrial Revolution. With business models and industries being disrupted at an ever-quickenning pace, the skills required in the workplace are developing and changing faster than ever before.

It is expected that the ongoing technological change will continue to displace some jobs that are commonplace in the workforce today, but will also generate jobs that do not exist today. Futurist Thomas Frey has predicted that 60% of the jobs we will be recruiting for in 2022 haven't been invented yet (Frey 2011). Had you even heard of app developers or data scientists ten years ago? In ten years' time will we be recruiting and developing drone dispatchers, electronic data waste managers and 3D food printing engineers?

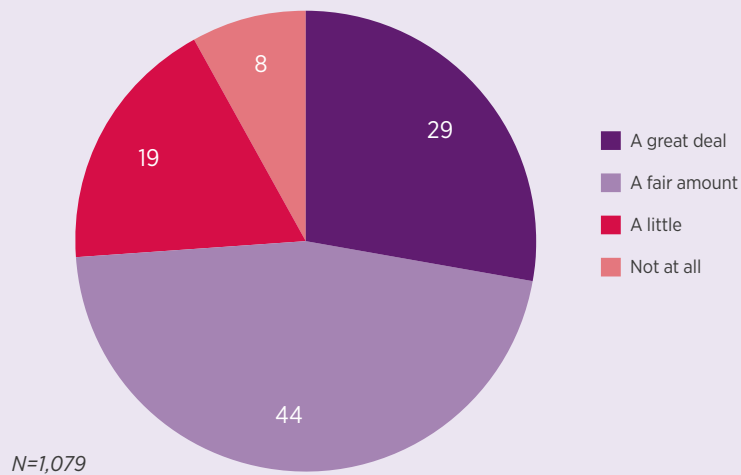
According to the World Economic Forum's Future of Jobs report, *'academics, chief executives, thought leaders and policy makers hold strong and diverse views on the debate'* into how technology will impact our workplaces of the future. *'There are those who predict limitless opportunities in newly emerging job categories and prospects that improve workers' productivity, and those that foresee massive workforce substitution and displacement of jobs'* (World Economic Forum 2016).

Preparing for change is an essential element of workforce planning

It is imperative that organisations factor in how changes in their business might affect the skills, knowledge and experience they require in the short, medium and long term. As businesses adapt to meet changing demands, the need for rapid re-skilling of the workforce will become more of a focus for HR and organisations. This should form the fundamental basis of any workforce planning strategy in organisations. This also relates back to the insights made earlier around the responsibility of organisations to work with educational providers to support the work-readiness of young people to meet changing future job requirements.

It is extremely interesting to see that most respondents to the survey anticipate a change in the types of skills that will be needed in their organisation in the next five years, with only 8% of respondents not expecting any change (see Figure 37).

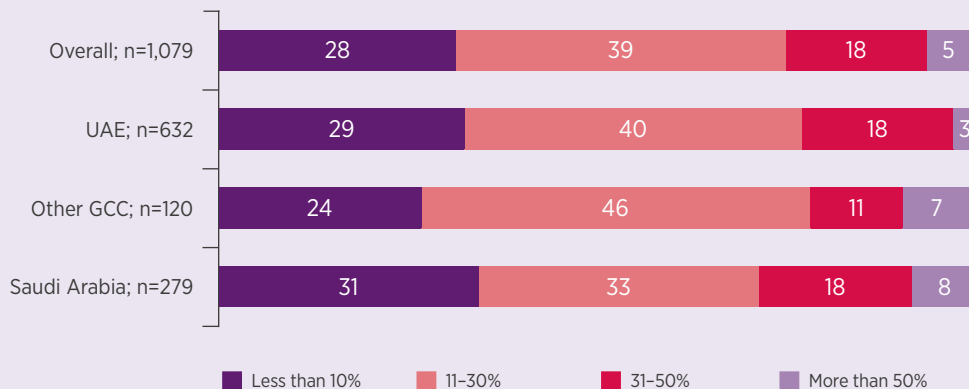
Figure 37: How much will skills required in your organisation change in the next five years? (%)



Jobs and work in the GCC will continue to evolve, with some roles becoming obsolete

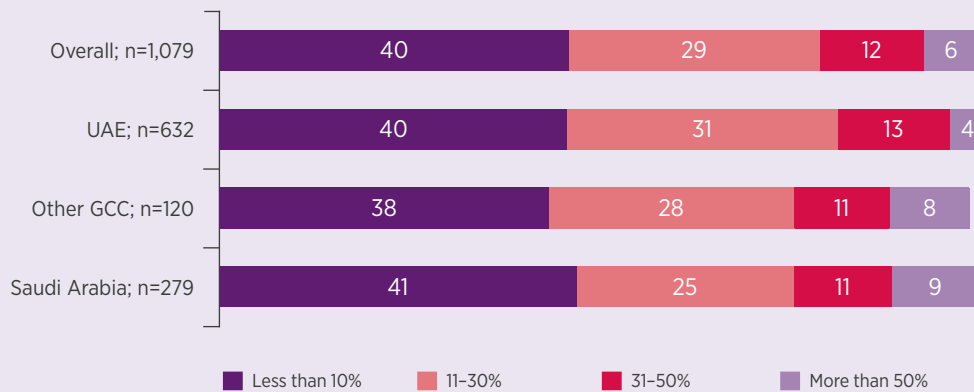
As illustrated in figure 38, a majority of respondents (67%) expect that in five years' time up to 30% of hires in their sector will be for roles that do not currently exist. A further 23% think that over 31% of hires will be for roles that do not currently exist.

Figure 38: Percentage of new roles in five years that do not currently exist (%)



Respondents were relatively less radical when asked what proportion of roles would become obsolete in the next five years, with 40% stating less than 10% of current roles would become obsolete (see Figure 39). 15% of respondents do not expect any current roles to become obsolete in five years' time.

Figure 39: Percentage of current roles you feel will have become obsolete in the next five years (%)



While it is clear from our survey that organisations across the region predict that the roles and therefore skills required by their businesses will change over the coming years, the survey does not confirm that respondent organisations are anticipating the significant shift towards robotics and automation at the expense of the jobs of humans that is predicted by many industry commentators. In fact, as highlighted earlier, 82% of respondents feel that advances in technology will positively impact their employees.

As summarised in a recent blog on *The Future of Work is Human* by CIPD CEO Peter Cheese, ‘*the HR profession has a huge role to play in ensuring that the future of work is enabled by technology but not driven by it. After all, it’s people who will ultimately decide whether or not to automate roles, not the technology itself. It is up to those working in HR and L&D to actively design for the future by developing new skills and building a work environment that meets the needs and demands of both organisations and employees of the future*’ (Cheese 2016).

residents spend approximately five hours a day using social media (Maceda 2016).

Given the prevalence of social media in daily lives, it is unsurprising that most (68%) of the organisations surveyed consider it a significant part of their organisation’s culture (see Figure 40).

As seen in Figure 41, the study indicates that organisations are increasingly using social media channels to engage with customers (24%) and also as a brand-building tool (21%), and to this end encourage the use of social media among their employees.

However, the use of social media for internal collaboration and employee engagement is still limited, as illustrated by Figure 42. The study finds fewer organisations use social media for encouraging employee collaboration, innovation and sharing ideas/networking.

Bernard Warner for *Bloomberg Business Week* summarises the positive insights from a two-year study by Warwick Business School which followed the way a company’s policy to encourage social media usage among its employees led to increased customer interaction and, eventually, higher productivity (Warner 2013).

In contrast, only 16% of

respondents to this survey feel that employees can be trusted to use social media sensibly, 19% limit access to social media in the workplace and 21% have clear rules to ensure employees do not damage the company brand on social media. While corporate resistance to social media on the grounds of security and brand damage are of course valid, it is important that restrictions put in place by organisations are thought through. Restrictions in place are often designed as rules to prevent the perceived disruption to productivity; however, the limitations on access to combat this potential risk could be at the expense of the positive impacts of innovation and improved customer

Figure 40: How much is the use of social media part of your organisation’s culture? (%)

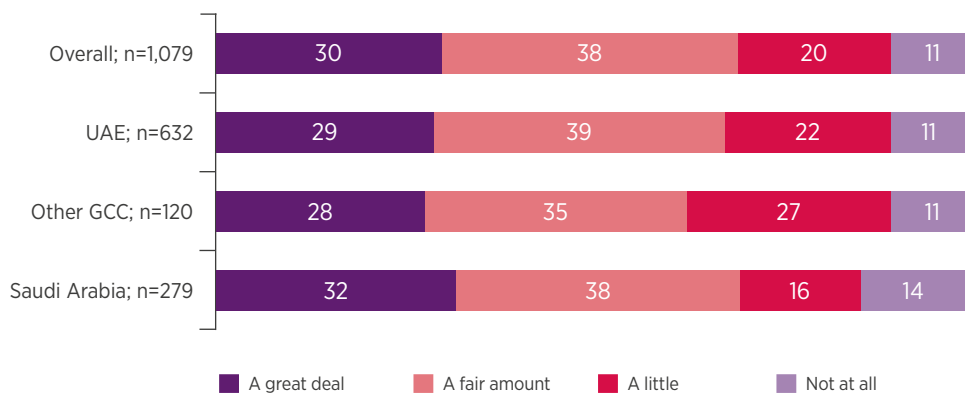


Figure 41: Which of the following describes your organisation’s approach to social media? (external communications only) (%)

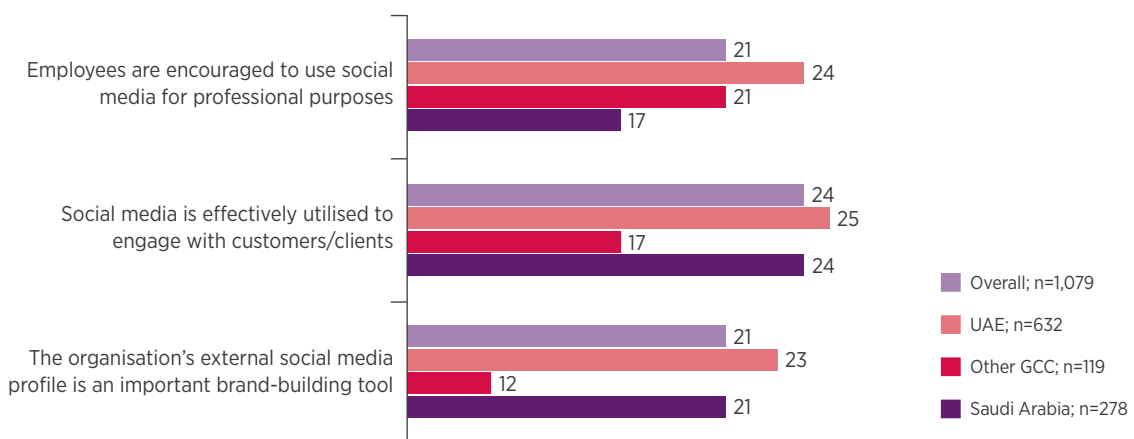
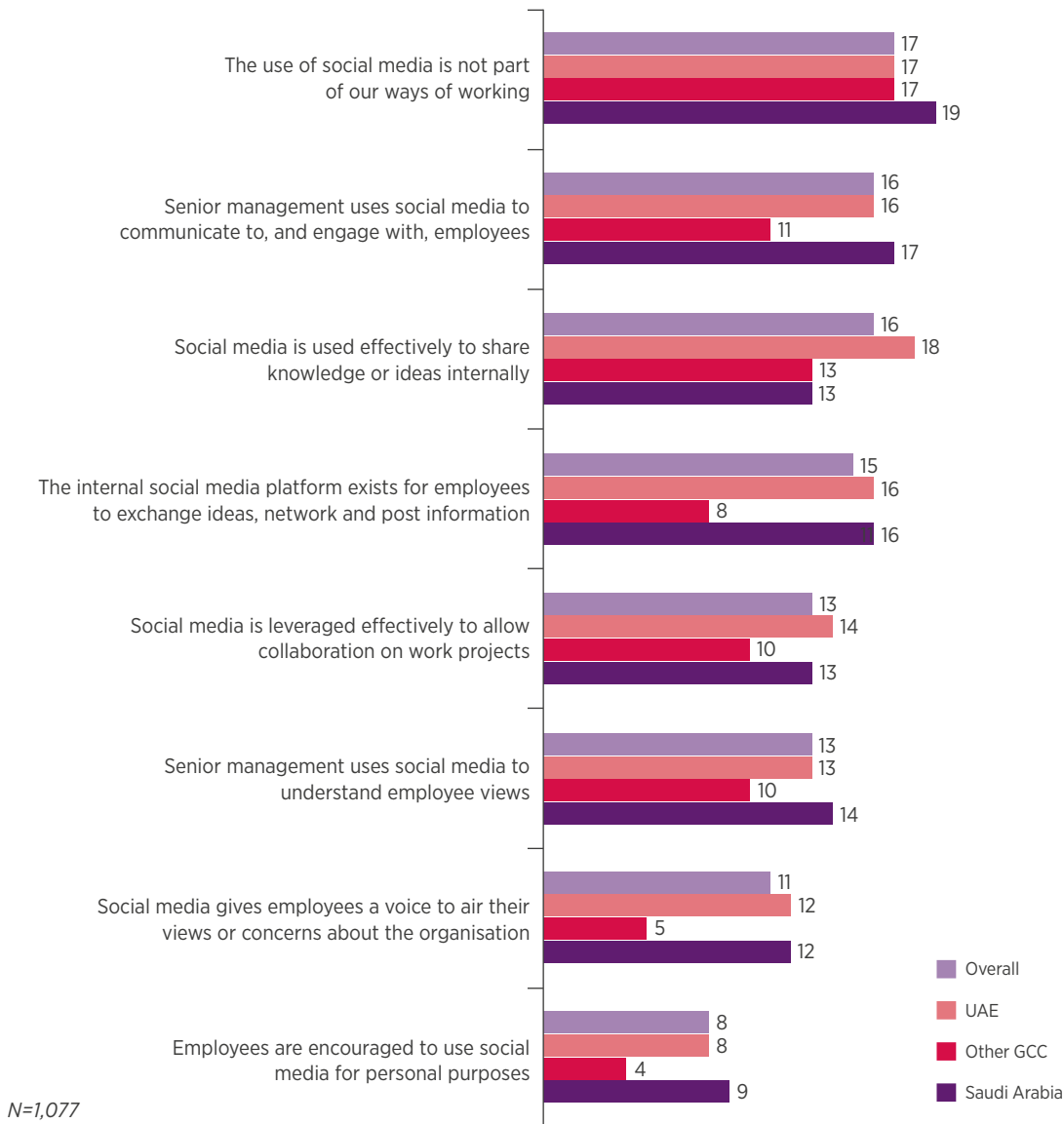


Figure 42: Which of the following describes your organisation’s approach to social media? (internal communication and collaboration) (%)



experience that maximising social media in the workplace can bring.

As summarised by Jacob Morgan, over the last decade we have seen a dramatic shift in our behaviour shaped by new technologies. We share our work history on LinkedIn, connect with others on Facebook, share photos on Instagram and tell people where we are on Foursquare. This is not just a millennial trend; we are seeing this across all demographics and geographies globally. *‘These new behaviours are now entering our organisations and this has given*

rise to new social and collaborative platforms for business’ (Morgan 2014, p3) – this is challenging the idea of how employees work and what they expect from an organisation. These social media communities have significant influence and power over the employer – just think about the value or damage to your employer brand through comments on Facebook or Glassdoor.

With the GCC increasing its impact and influence in the world economy, it is essential that organisations maximise the

opportunities presented through technology and social media to engage and motivate the current and future workforce, connect with customers, and benefit from ongoing insights and advances in technology to gain competitive advantage.

Conclusion

There is no doubt that the world of work is changing, and while we so often talk of the future world of work and the future of HR, the reality is the future is now! As Bertrand Piccard so famously said when the Solar Impulse landed in Abu Dhabi, having completed its historic trip around the world, *'the future is clean, the future is you, the future is now, let's take it further'* (Batrawy 2016). Someone, somewhere is doing something that feels, sounds and looks like the future (Timms 2016). The intention of this survey was to help HR professionals and organisations across the GCC to reflect on where they stand in terms of the trends that are transforming the region and consider whether they are prepared to tackle and embrace the challenges and opportunities ahead.

Positive research findings

There are a number of positive messages emerging from the research findings, not least for the HR function itself, with a clear confidence in, and recognition of, the value of the role of HR on organisational performance.

Organisations' top current strategic workforce priorities in the region sit under three major themes: attraction and retention of talent; employee well-being, happiness and engagement; and learning, development and performance management. All of these are areas that will help to not only attract talent into the organisation but also help retain them and enable them to do the best job possible for their organisation.

Organisations also show a strong awareness of issues that are likely to have a sizeable impact on their workforce strategies going forward. These include: change in customer demands and demographics; changing economic and political environment; and shifting employee relationships and expectations. Encouragingly there is also a keen awareness of the importance of innovation in the survey results, something which has also been highlighted as a priority by various regional governments as part of their economic diversification agendas.

The results show that organisations are increasingly engaging with the workforce of the future. There is a young age profile in the workforces of respondent organisations, with the majority of the workforce (63%) aged 39 and under, and 32% aged under 30. It is also encouraging that most organisations across the GCC are proactively seeking to recruit young people (aged 16–24), with over half confirming that they recruit young employees. There seems to be a clear recognition that recruiting young people helps to build talent pipelines and bring new thinking into the organisation.

Finally, from a positive perspective, respondents believe that advances in technology are likely to be positive for their organisations, with the areas that technology is anticipated to have the greatest impact, including productivity, efficiency and quality.

More work needed

However, there is more work needed in several important areas. First, organisations in the GCC countries need to start to be more strategic in their workforce planning. The risk of HR teams in the region taking a shorter-term approach to planning is that they remain reactive and focused on current and immediate issues, as opposed to putting the necessary steps in place to meet the future needs of work, the workforce and the workplace.

More work is also required in increasing the representation of women in the workforce, both at junior levels and in more senior positions. However, it is encouraging to see that over half of respondents state that proactive efforts are currently being undertaken in their organisation to improve gender diversity. While efforts are being made across the GCC to increase female workplace participation, progression of women to senior and executive roles requires a strong and sustainable framework to recruit and develop women at every stage of their career.

Our research shows that more can be done to offer opportunities for part-time work in the region, with a quarter of organisations actually expecting to decrease their part-time workforce over the next 12 months. With the changing face of the regional workforce and increases in multigenerational and gender diversity, a more positive move towards offering flexible

working arrangements will be critical to meet the demands and expectations of the workforce of the future.

When it comes to health and well-being, few organisations have a standalone strategy and just under a fifth consider health and well-being to be an integral part of their people strategy. And, of the organisations that focus on health and well-being, few say they evaluate the organisational impact of their health and well-being activities.

Finally, although organisations in the GCC region are increasingly using social media channels to engage with customers and as a brand-building tool, the use of social media for internal collaboration and employee engagement is still limited and organisations are potentially missing out on the positive impact of innovation and improved customer experience that optimising social media in the workplace can bring.

In conclusion, we hope this report helps inspire an aspirational agenda for organisations in the region. While we have presented the research findings in separate sections around key themes, they are of course all interrelated. Organisations need to consider each trend in their own business context and translate their understanding to guide and inform their future strategy. In their research into the impact of global trends on the Middle East, PwC concluded that *'the opportunities are great – but so too are the threats. If the Middle East ignores the breakthroughs that are disrupting sector after sector around the world, it will not be able to compete in the economy of the*

future' (PwC 2016b, p4). This is the context in which HR as the people experts have an ever greater role to play, challenge, innovate and change.

When reflecting on the research, it becomes clear that HR teams need to be at the cutting edge of innovation across industries to anticipate the impact the megatrends will have on the workforce – and this requires HR leaders to take a longer-term strategic view, while also delivering on short- to medium-term operational priorities. They need to lead collaborative partnerships with the education sector, become skilled organisation design practitioners, and define organisational culture, making their workplaces more attractive and socially responsible. HR must influence their business to think differently through data and insight that maximises commercial opportunities and also realises the holistic benefits of a more diverse, healthy and engaged workforce.

Proactive, considered, planned and collaborative efforts from all organisational stakeholders is key to enable organisations to achieve long-term success that benefits not only their business but society as a whole.

'When reflecting on the research, it becomes clear that HR teams need to be at the cutting edge of innovation across industries to anticipate the impact the megatrends will have on the workforce.'

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