

# Workforce Strategy Benchmarking Survey

Middle East and North Africa Data Sheet



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91 organisations

8 countries

11 industries

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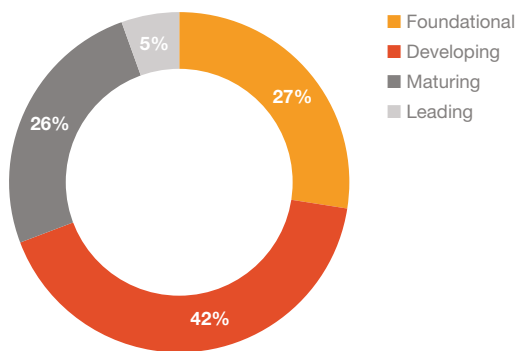
We are living through a fundamental transformation in the way people work. Organisations need a strong workforce strategy today that helps them take action to prepare for tomorrow's world of work. We surveyed over 91 organisations in the Middle East and North Africa (MENA) to see how they stack up:

## Stepping up to deliver a workforce strategy for the future

Overall, **5%** of organisations in MENA are classified as 'leading' in their approach to workforce strategy. These businesses are prepared for the future across the four diagnostic components: planning; purpose; technology; and talent.

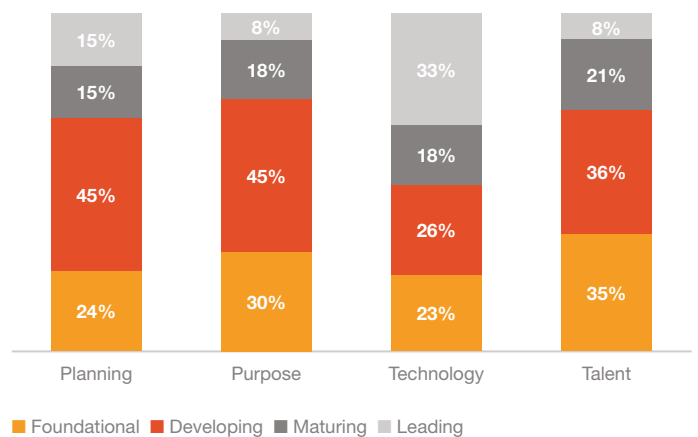
The maturity of MENA organisations' workforce strategy varied across diagnostic components. Notably, **33%** of organisations in MENA are ranked as 'leading' in their strategic approach to **technology**, indicating they are making technology-related investments with human impacts in mind (e.g., employee experience and productivity). In comparison, only **8%** are ranked as 'leading' in their approach to aligning workforce strategy with their **corporate purpose and values**.

### Overall maturity designations



Source: PwC Workforce Strategy Benchmarking Diagnostic 2019

### Overall maturity by diagnostic component

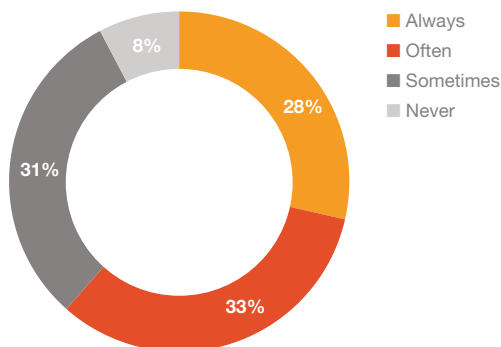


Source: PwC Workforce Strategy Benchmarking Diagnostic 2019

## The importance of planning – when linear predictions don't cut it

To plan for the future, organisations need to engage in integrated business, financial and workforce planning, bringing together the right stakeholders, data and mindset to engage in "scenario planning". Overall, **28%** of organisations said they 'always' take a scenarios approach to their strategic planning - with 39% 'never' or only 'sometimes' taking this approach.

**Question:** To what extent does your company engage in strategic scenario planning?



Source: PwC Workforce Strategy Benchmarking Diagnostic 2019

**Question:** To what extent does your organisation create future scenarios that consider the impact on your...? (percentage of those that responded 'always')



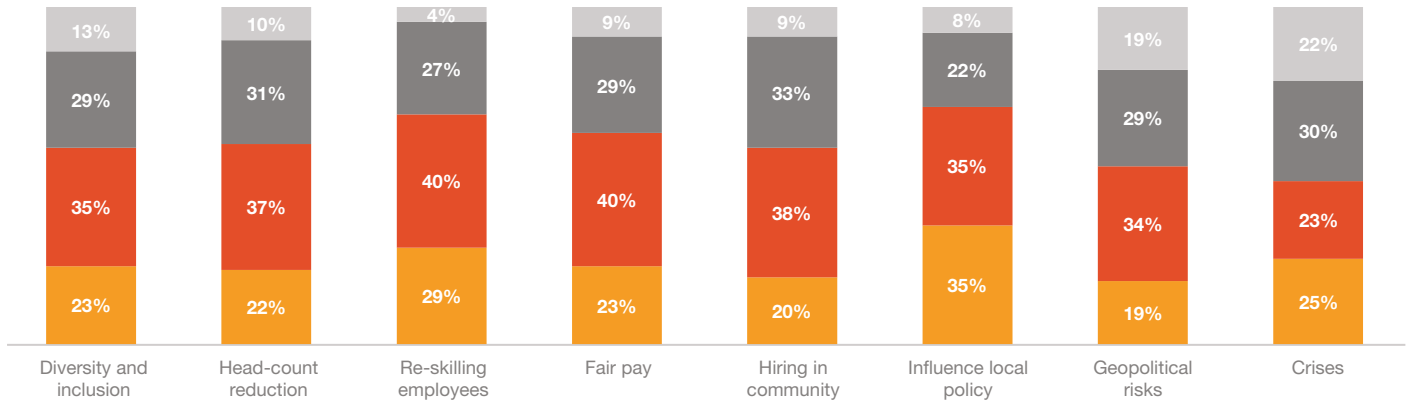
Source: PwC Workforce Strategy Benchmarking Diagnostic 2019

**Note:** This sheet reflects highlights and major trends for the four main components of the Workforce Strategy Diagnostic Survey. This does not reflect all questions within the diagnostic.

## Make decisions based on purpose and values

A coherent workforce strategy must align key decisions with the organisation's purpose and values. Though businesses in MENA are making headway in aligning the management of headline-grabbing issues such as **influencing local policy** and **re-skilling employees** with their purpose, they aren't faring nearly as well when it comes to facing up to prospective **geopolitical risks**. Just **19%** say they 'always' consider the organisation's purpose and values when making decisions in this area. Organisations are also less sure that they make decisions based on purpose and values when it comes to **hiring in the community** and **head-count reduction** – **20%** and **22%** say they 'always' align with purpose for each of these, respectively.

**Question:** To what extent does your organisation manage each of the following consistently, with your organisation's purpose and values?

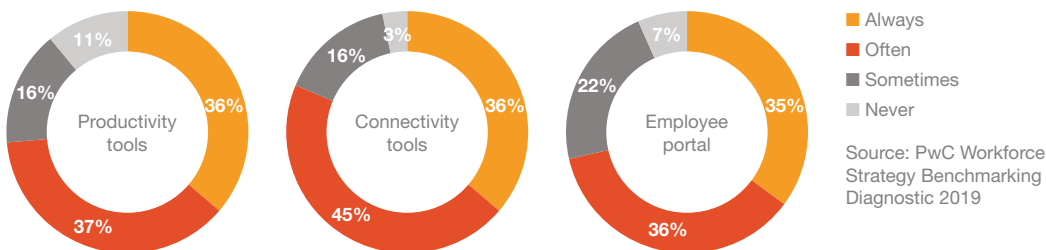


Legend: Always (Orange), Often (Red), Sometimes (Grey), Never (Light Grey)  
Source: PwC Workforce Strategy Benchmarking Diagnostic 2019

## Embrace technology as a force for good

Getting the technology component of workforce strategy right can be the difference between gaining competitive advantage in the market and falling behind. Decisions about technology need to be made with their impacts on the workforce clearly in mind, or they risk harming the employee experience, productivity and morale. More than **35%** of organisations in MENA report that they are 'always' effective in the ways they digitise productivity, connectivity and employee portal tools.

**Question:** To what extent does your organisation effectively digitise the employee experience by leveraging the following tools?

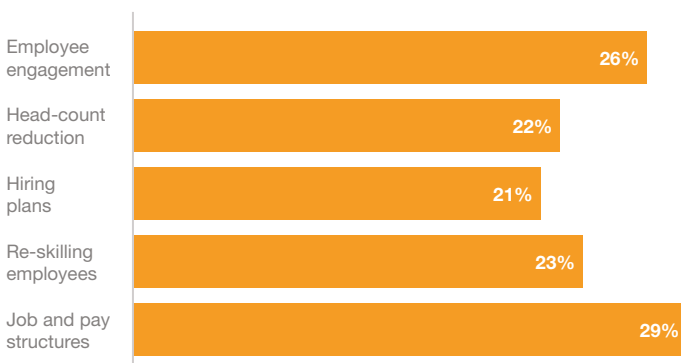


Legend: Always (Orange), Often (Red), Sometimes (Grey), Never (Light Grey)  
Source: PwC Workforce Strategy Benchmarking Diagnostic 2019

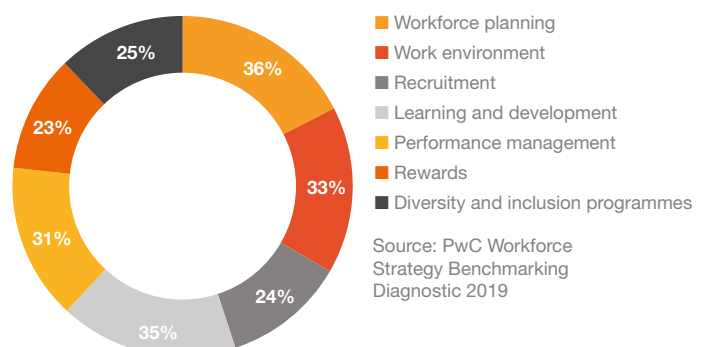
## Focus on talent, humans, and the humane

While several organisations consider the people impacts of robotic process automation (RPA) and artificial intelligence (AI) on their workforce and talent programmes, this is the least mature component of the four. The percentage of respondents answering 'always' suggests that organisations in MENA are thinking the most about RPA and AI impacts on **job and pay structures (29%)**, and the least about **hiring plans (21%)**.

**Question:** To what extent does your organisation consider the people impacts of RPA/AI on the following? (Percentage of those that responded 'always')



**Question:** To what extent does your organisation evolve or redesign talent programmes to meet changes in market or workforce needs? (Percentage of those that responded 'always')

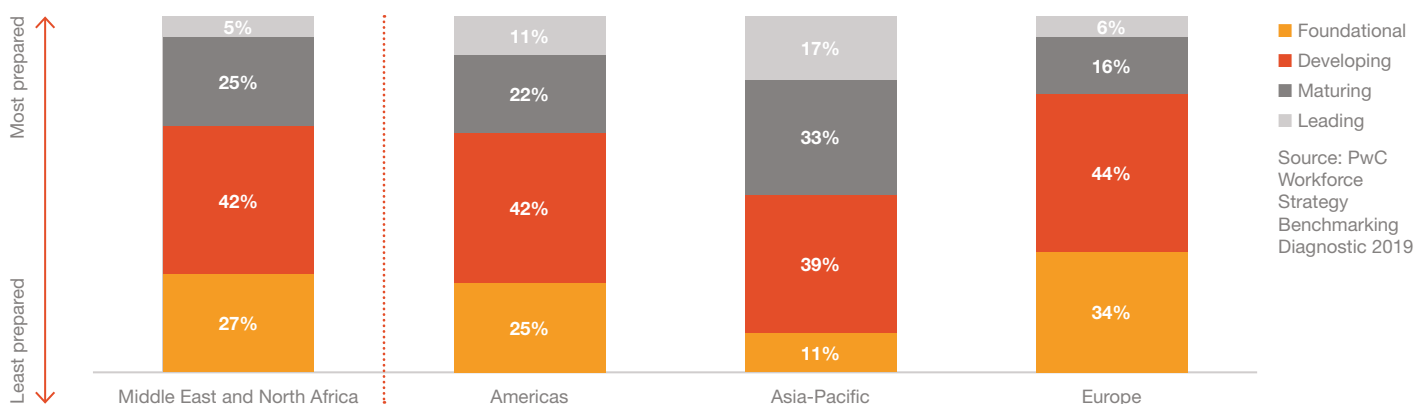


Legend: Workforce planning (Orange), Work environment (Red), Recruitment (Grey), Learning and development (Light Grey), Performance management (Yellow), Rewards (Dark Orange), Diversity and inclusion programmes (Dark Grey)  
Source: PwC Workforce Strategy Benchmarking Diagnostic 2019

## How do organisations in Middle East and North Africa compare to those in other regions?

Organisations in MENA are not as mature when compared to other regions, suggesting that preparations for future work and workforce needs have been made, but with room for improvement. Only **5%** of organizations in MENA are considered leading in their preparedness for future workforce needs; in comparison, **17%** of organisations in Asia-Pacific fell into this category.

### Overall maturity by region



### Take the Workforce Strategy Diagnostic

Diagnose the maturity of your organisation's workforce strategy and see how you compare with others in your region and industry.

[www.pwc.com/workforce-strategy-diagnostic](http://www.pwc.com/workforce-strategy-diagnostic)

## Related reading

[Workforce of the future: The competing forces shaping 2030](#) - What will the world of work look like in 2030. What are the key items leaders should be considering?

[Preparing for tomorrow's workforce, today](#) - Insights from a global survey of 1,200 HR and business leaders in 79 countries highlight the key risks for organisations - and the actions they need to take today - as they look forwards at the work, workers and workplace of tomorrow.

[Our status with tech at work: It's complicated](#) - Leaders think they're choosing tech to get great work from employees - yet our global survey of 12,000 workers shows a disconnect between what leaders and workers think.

### About the Survey

The purpose of this diagnostic is to allow organisations to assess their workforce strategy maturity across four distinct areas: planning, purpose, technology, and talent. As of January 2019, the diagnostic has been taken by 1243 leaders in 36 countries across 12 industries.

## Questions? To learn more, contact:

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