Digital HR Survey 2020

Challenges and opportunities for Middle East companies

Technology and upskilling can help organisations create a strategic role for HR as part of their broader digital transformation.

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About the survey

PwC Middle East and SAP surveyed more than 600 executives and HR professionals from different industries and countries across the Middle East for the Digital HR Survey 2020. The purpose of the study was to better understand the steps organisations need to take to transform the role of HR into a more strategic, value-adding function. The study included both questionnaire responses and in-depth interviews with select senior participants.

Respondents by location:

United Arab Emirates	**39%**
Saudi Arabia	**27%**
Egypt	**10%**
Qatar	**8%**
Other Middle East countries	**11%**
Outside the Middle East	**5%**

Respondents by seniority:

Board member	**4%**
C-level	**11%**
Senior management	**22%**
Middle management	**25%**
Professional	**32%**
Student, intern or other	**6%**

The survey was fielded between 16 February and 28 June 2020. Pre-COVID-19 results refer to data gathered between 16 February and 15 April while the data gathered between 16 April and 28 June was used for 'during COVID-19' results.

To validate the findings, PwC Middle East also conducted 13 interviews with government and private sector representatives working in organisations based in the UAE, Saudi Arabia and Kuwait. These interviews are summarised in the 'Recommendations from Middle East executives' sections of the report.

The base size for the graphs and figures mentioned in this report varies between 92 and 608 responses. Not all figures in the report add up to 100% as a result of rounding percentages.

Foreword

The world today is undergoing change and disruption, which is by all measures unprecedented. Well before the COVID-19 pandemic struck, large-scale shifts in demographics, climate, urbanisation and economic power, to mention a few, have been causing massive change in our world. But by far, the fastest changes are being brought about by advances in science and technology in general, and in digitisation in particular.

We launched this study to better understand the impact that this digitisation is having on the Human Resources (HR) function across the Middle East. Many of our hypotheses about the pace and impact of digital change on HR have been confirmed by the study. While HR lags behind other functions when it comes to digital adoption, the opportunities to redefine what HR does in a world enabled by digital technology are game changing.

Mindsets, culture and resistance to change are likely to be the most challenging obstacles on the road to digital HR transformation. However, the COVID-19 pandemic is teaching us that we as humans are resilient and that, when push comes to shove, we are able to change habits and ways of working in an instant. Thanks to digital technologies already there and our collective ability to embrace them, our region and the world have managed to keep going, working remotely or otherwise, despite the challenges. We see this as a sign that adopting new ways of working and new digital paradigms is possible to do, and in record time.

We hope this study stirs your thinking around the possibilities that digital technologies and mindsets offer for re-imagining HR, and in doing so helps inform your decision making going forward.

David Suarez
Partner, People & Organisation Leader
PwC Middle East
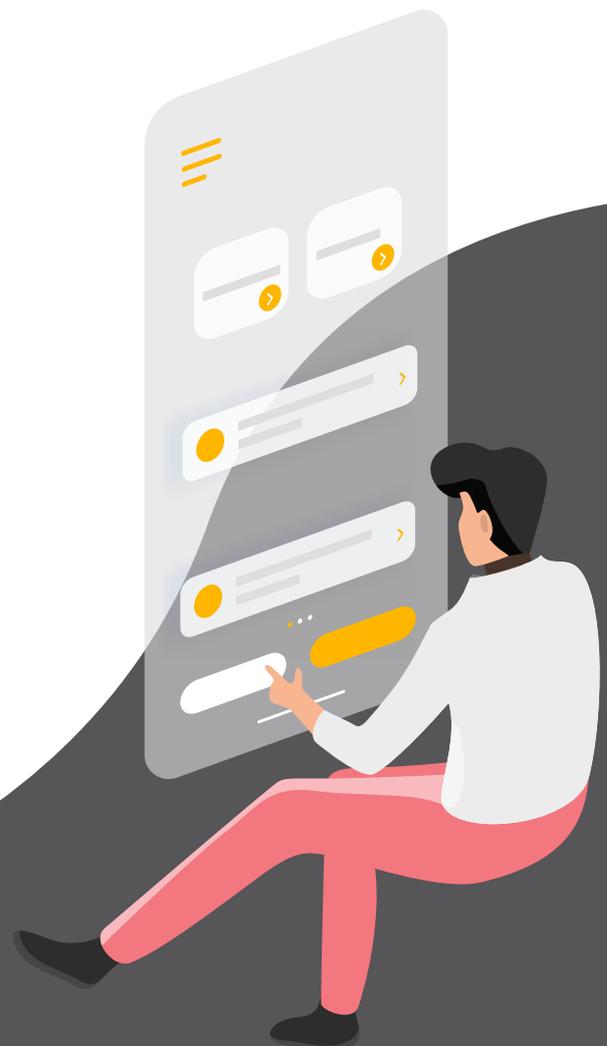
Digitalising is critical for transforming HR, developing leaders and enhancing employee experiences

Digitalisation is transforming how companies work in ways that were previously unimaginable. COVID-19 has shown that mass remote working can succeed and new ways of doing business have taken hold at an unprecedented rate. Companies are trying to make the most of the benefits of digitalisation across all their functions and HR is no exception.

HR departments have traditionally been transactional service providers in Middle East companies, organising recruitment and arranging visas for overseas workers, among a range of tasks. However, over the past few years, we have noticed a desire among both private companies and the public-sector organisations we work with to transform the role of HR and make it a much more value-adding strategic function that shapes talent, develops leaders and enhances the overall employee experience. Digitalising HR is a critical lever that companies need to get right in order to achieve these goals.

To better understand what steps organisations need to take to digitalise HR, we carried out a survey between February and June 2020, adjusted in the later months to take account of the impact of the COVID-19 pandemic. In addition, we conducted a series of detailed interviews with private and public-sector executives across the Middle East.

Our aims were to:

• Understand the level of digital maturity in the region generally and in HR functions specifically

• Examine the role that Middle East companies want HR to fulfil in the future

• Analyse how digital technologies and mindsets can support the transformation of HR and the organisation as a whole
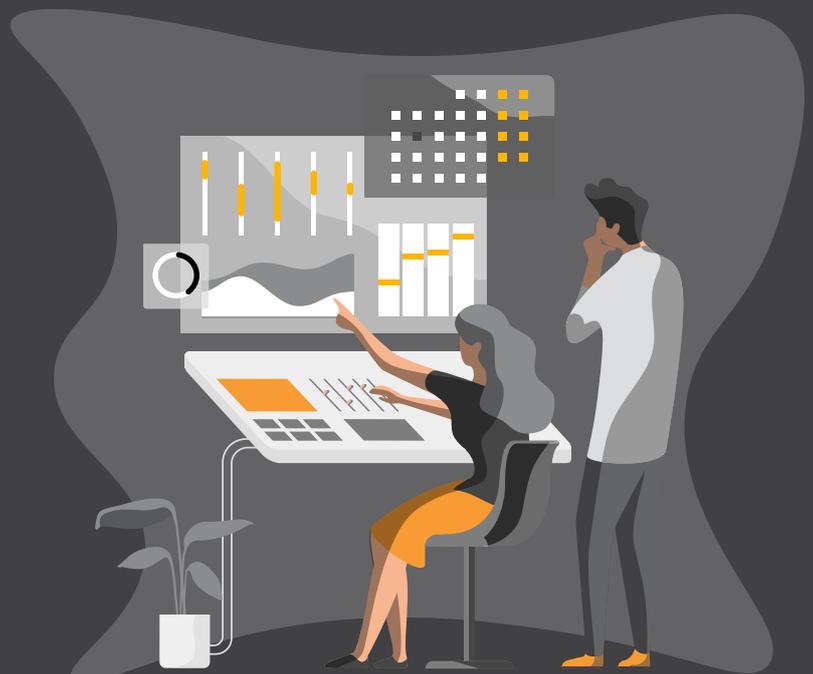
Key findings

Our survey of 608 executives and HR professionals across the region highlighted the following **key points**.

72%
of respondents confirmed that COVID-19 has accelerated digital transformation in the Middle East

Only 9%
of respondents believe that their HR function is leading or innovating with digital technologies

Upskilling
is the primary enabler of digital transformation. Bringing in digital skills from outside the organisation as well as flat & flexible organisational structures are also important

RoI
is the most critical factor for organisations when deciding whether to invest in digital technologies, with innovation in second place

Only 48%
of respondents said back-office HR tasks are ripe for digitalisation

64%
of respondents believe HR should evolve into a talent developer and a change leader in the organisation

Only 26%
of respondents said HR should evolve to play a more advanced role in employee experience design, suggesting there is room for more digital ambition

CEOs lead digital
and are 4-10 times more likely to lead digital transformations than any other C-level or senior executives

55% of respondents believe HR's biggest contribution to digital transformation is digitalising HR processes

Currently, 55% of survey respondents see HR's biggest contribution to the overall digital transformation of their organisation as digitalising HR processes, with training staff to close the digital skills gap a distant second at 29%. Going forward, 48% believe that C-level executives and line managers will expect the HR function to support the digital transformation of the whole organisation by driving changes in company culture and mindset.

Companies in the region certainly understand some of the benefits of digital transformation – particularly around efficiency, automation and innovation through better data analysis – and want to implement it. They also know that increasing the digital skills of their workforce is crucial. However, there is a great deal of work still to do. Overall, the survey responses showed a lack of awareness of the emerging technologies that exist, and their potential impact on businesses, beyond automation and cost reduction.

Our report aims to help bridge this gap by considering the steps that organisations are planning to take to drive digital upskilling and transformation, and the potential role that HR can play.

1

Digital maturity across organisations and within HR

The unprecedented measures taken by Middle East governments to suppress the spread of COVID-19 led to mass remote working facilitated by digital technology. Some 72% of survey participants said the pandemic has accelerated their organisation's digital transformation, with two key drivers: increased investment (36%) and increased employee demand (36%).

Organisations have found that some of the changes enabled them not only to keep their businesses going through the pandemic, but also to do so more effectively: one-third of participants said offering more flexibility, such as working remotely or employees choosing their working hours, promoted productivity, as did access to digital collaboration tools.

One of the most important ways leaders are able to navigate through the new ways of working prompted by COVID-19 is by empowering people. This was highlighted by Mohannad Basodan, Deputy Governor of Strategy & Transformation at GAZT who emphasised **the importance of relying on and trusting in the abilities of management to guide and motivate their remote teams effectively so that work commitments are never compromised**.
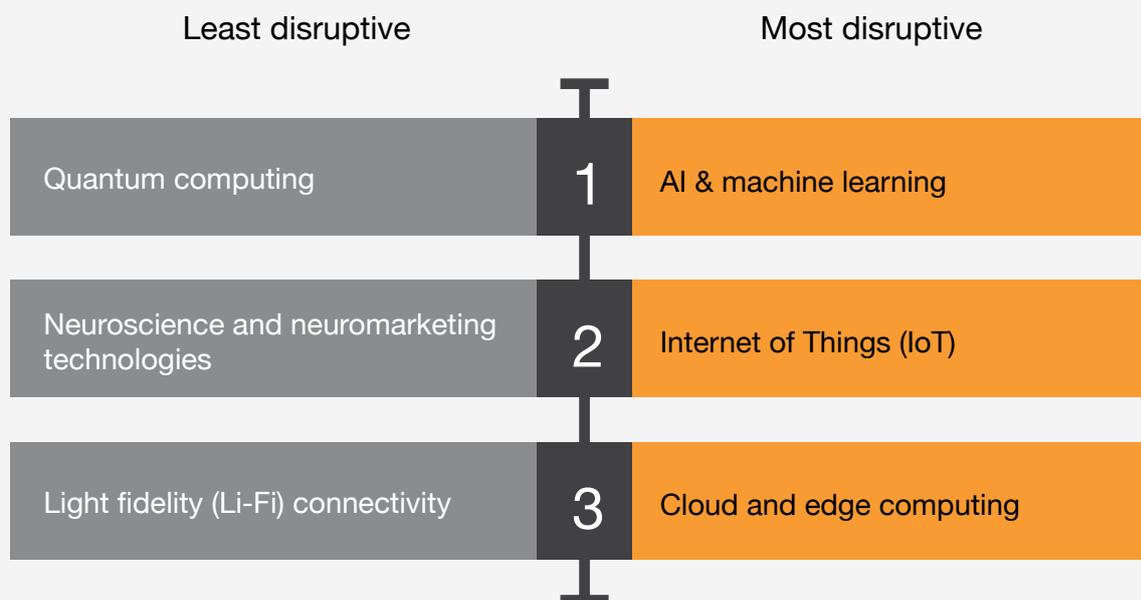
Dr. Hazza Alneaimi, Coordinator General for Dubai Government Excellence Program in Dubai's Executive Council, says **the successful changes could prompt the government to re-evaluate which roles are adding value and how organisations can upskill or reskill people and re-allocate them to new digital jobs. He also expects greater focus on performance-based pay in future**.

However, our findings also show that most companies in the region are still at an early stage of digital transformation in HR. Respondents view artificial intelligence (AI) and machine learning, Internet of Things (IoT) and cloud computing as the technologies that are most disruptive to their business. Some, though few, HR teams are already exploring what these technologies, from AI-enabled CV screeners to automated or semi-automated digital assessment tools, can do to make their ways of working more efficient.

Yet it appears that companies are using such digital technologies to enhance "business as usual" – focusing on efficiency and automation of the talent value chain to do what they normally do in new ways, rather than looking at how these technologies can be used to do new things in new ways.

Technologies such as quantum computing, neuroscience and neuromarketing technologies, light fidelity (Li-Fi) connectivity as well as virtual reality, robotics, 3D printing and augmented reality were all ranked as least disruptive. These results indicate that awareness of emerging technologies and their potential business impact needs to improve.

What technologies are most disruptive or best known to your organisation?

Least disruptive		Most disruptive
Quantum computing	1	AI & machine learning
Neuroscience and neuromarketing technologies	2	Internet of Things (IoT)
Light fidelity (Li-Fi) connectivity	3	Cloud and edge computing

Source: PwC, Middle East Digital HR Survey 2020

Asked the question whether HR will change as a result of the pandemic, Joe Chalouhi, CHRO at Bee'ah – an environmental management company in the UAE – believes HR will be very different in a post-COVID-19 world and play a pivotal role in this new adaptation. Flexibility and productivity will increase. COVID-19 has forced massive disruption extremely quickly, he says, "**we have the ability to spontaneously change but we need to be smart about how we harness this new opportunity without losing employee engagement, productivity and service quality**."

Digital decision-making

Our survey responses show that in the Middle East, the key decision-maker in digital transformation is the CEO, with 49% of respondents identifying him or her as the main sponsor within their organisation. CEOs are four to ten times more likely to lead or sponsor digitalisation than any other C-level executive, with CIOs a distant second at 13%. This suggests highly centralised decision-making about digitalisation, meaning that C-suite executives who lead different business operations must actively engage with CEOs to help them understand which technologies to adopt.

Mohammad Al Mughrbi, General Manager of the Directorates Integration & Shared Services Establishment Program at Saudi Arabia's National Water Company (NWC), said that, in the context of digital transformation, **HR teams must work to support the executive team of the organisation by having a financial objective as well as an operational improvement goal for their digital plans. Becoming a digital organisation is NWC's top priority and the company is currently carrying out a digital transformation programme, chaired by the CEO, covering all functions including HR. The current COVID-19 pandemic has accelerated the digital journey even more**.

Recommendations from Middle East executives
Key obstacles to overcome while digitalising the HR function

Cultural barriers

Leadership support is lacking, and organisations are not yet digitally mature enough to see how digital tools could transform HR into a strategic function.

Skills barriers

There are too few people with digital skills in the organisation to support the transformation and maintain the systems once they are in place.

Funding barriers

Digital investment in the core business is often prioritised, with support functions including HR overlooked by IT teams. HR teams must make a clear business case.

CEOs are 4-10x more likely to lead digital transformations than any other C-level or senior executives
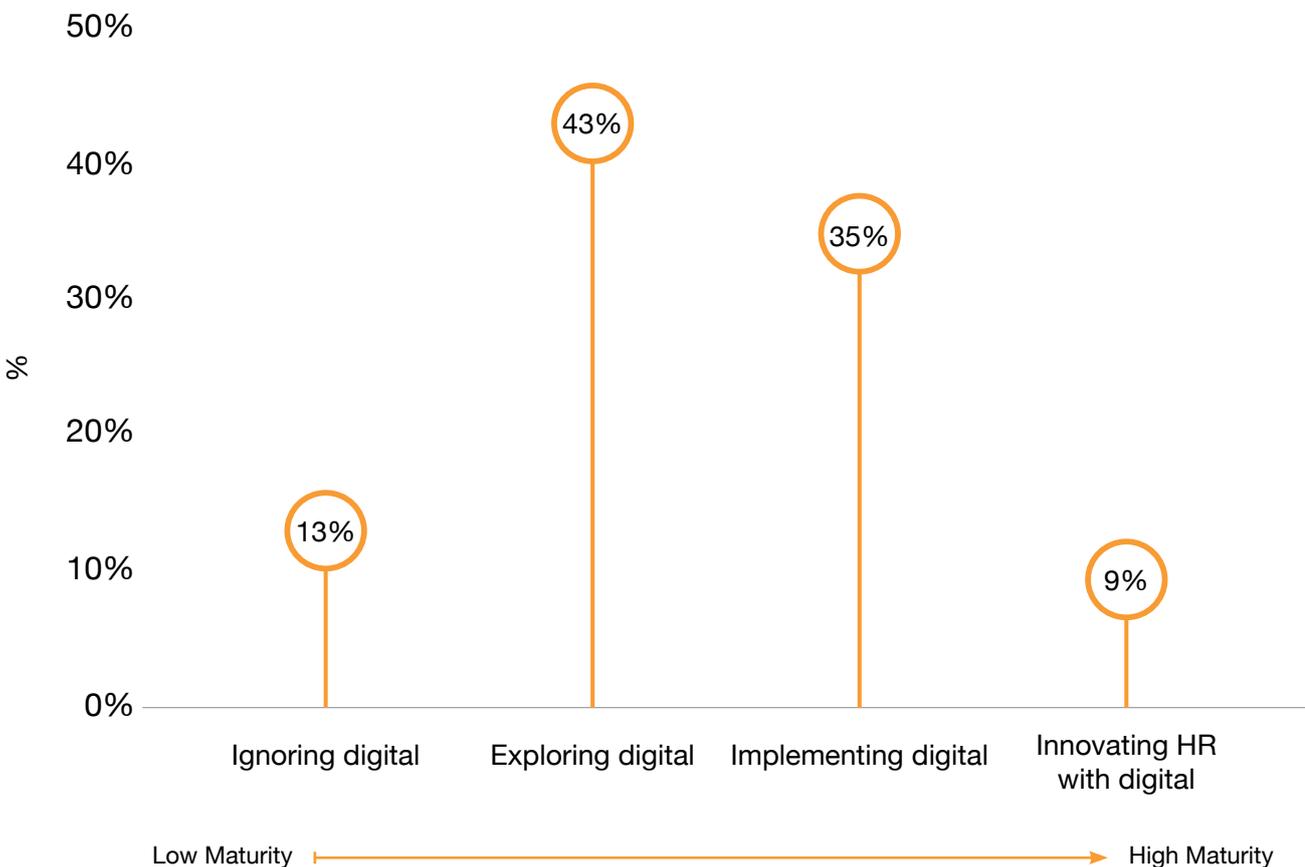
Digital HR in focus

Examining **digital maturity in HR in more detail**, our survey results show departments have work to do to capture the full potential of digital transformation. Only 9% of participants reported that their organisations are innovating in HR with digital technologies, while only 13% believe that their HR function is ignoring digital altogether. That compares with 43% who said that their companies are merely exploring digital and 35% who are already implementing it.

Andreas Binnmyr, HR Transformation & Technology Leader at Al-Futtaim, the UAE-based conglomerate, described HR organisations in the Middle East as having **"one foot in the old world, one in the new"**. **Fifteen years ago, digital HR was all about implementing SAP and similar ERP platforms. Today it's much more than that – it's about improving the employee experience from hiring to retirement, enhancing decision-making through AI and moving from backward-looking analysis of talent data to more advanced applications such as predictive modelling**.

Having teams with the right skills is just as important as the technology itself. To this end, Al-Futtaim aims to use the "agile" approach, which began life in the software-development world, where cross-functional teams are formed to solve specific problems.

9% of respondents said their organisation is innovating in HR with digital technologies

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What is the digital maturity level of the HR function in your organisation?

Ignoring digital	Exploring digital	Implementing digital	Innovating HR with digital
13%	43%	35%	9%

Low Maturity →→→→ High Maturity

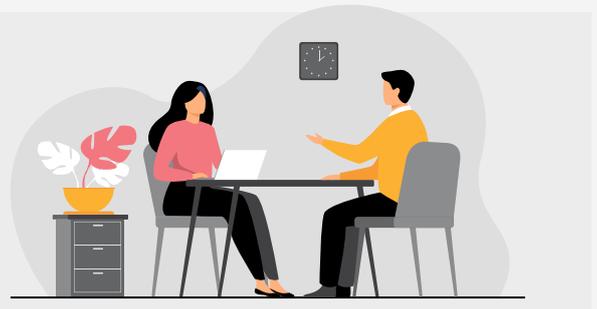*Source: PwC, Middle East Digital HR Survey 2020*

Respondents in both HR and non-HR roles say HR departments need more digital reskilling than other functions. Followed by finance and procurement departments. This highlights how HR is not regarded as a core area in digitalisation programmes across organisations. Both HR and IT teams need upskilling so that technology providers can work with HR teams to transform the function into one that is more digitally enabled.

The tools are certainly available for teams with the skills to use them. Abdulaziz Al-Kadi, VP of Shared Services at National Unified Procurement Company (NUPCO), Saudi Arabia's national healthcare supply chain organisation, said: "**There are many solutions offered by HR start-ups and technology companies that will enable CHRO's and their organisations to benefit from various choices to increase productivity, automate tasks, and change the environment and organisational culture that they have**."

Which 'traditional' functions need more reskilling due to digital transformation?

Human resources
57%

Finance
47%

Procurement, logistics
35%

Note: Answers add up to more than 100% because respondents were asked to choose "all that apply".

Source: PwC, Middle East Digital HR Survey 2020

Currently, the biggest contribution of HR departments to overall digital transformation is digitalising HR processes, according to 55% of survey respondents, with training staff to close the digital skills gap in second place (29%).

These results clearly indicate that HR principally promotes digital transformation through adopting technologies to enhance HR processes, rather than by ensuring the organisation has the capabilities to implement technologies and support broader digital objectives. Yet a well-designed digital transformation of the HR function will achieve both outcomes.

2

What does a digital future for HR look like?

The HR activities that respondents believe will be most affected by digital disruption include recruiting, employer branding and training and development. However, expectations differed depending on whether the survey was completed pre-COVID-19 or after the outbreak of the pandemic.

Pre-COVID-19, from survey data gathered between February and April, the most popular choice was recruiting and employer branding, followed by training and development, and then performance management. During the crisis there was a shift in perception with training and development becoming the most popular choice, followed by performance management and then recruiting and employer branding.

What HR activities and processes in your organisation will be most impacted by digital disruption?

Before the COVID-19 outbreak	During the COVID-19 outbreak
Recruiting and employer branding	Training and development

Before COVID-19 outbreak: Refers to data collected between 16 February 2020 and 15 April 2020. During the COVID-19 outbreak: Refers to data collected between 16 April and 28 June 2020.

Source: PwC, Middle East Digital HR Survey 2020

Recommendations from Middle East executives
Top benefits of HR digitalisation

Faster

Automation streamlines routine tasks and supports HR teams to work in more agile ways and focus on strategic priorities.
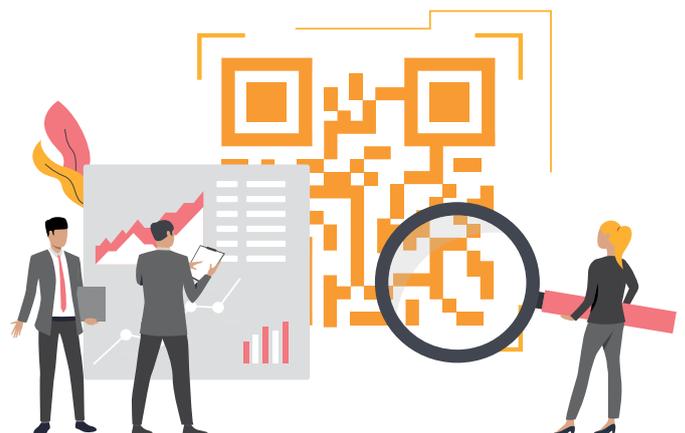
Smarter

More accurate data and better analytics support decision-making and identify gaps in capabilities.

Happier

Digital records enable transparency about how employees' careers are managed, and tools such as apps to access payslips improve the employee experience.
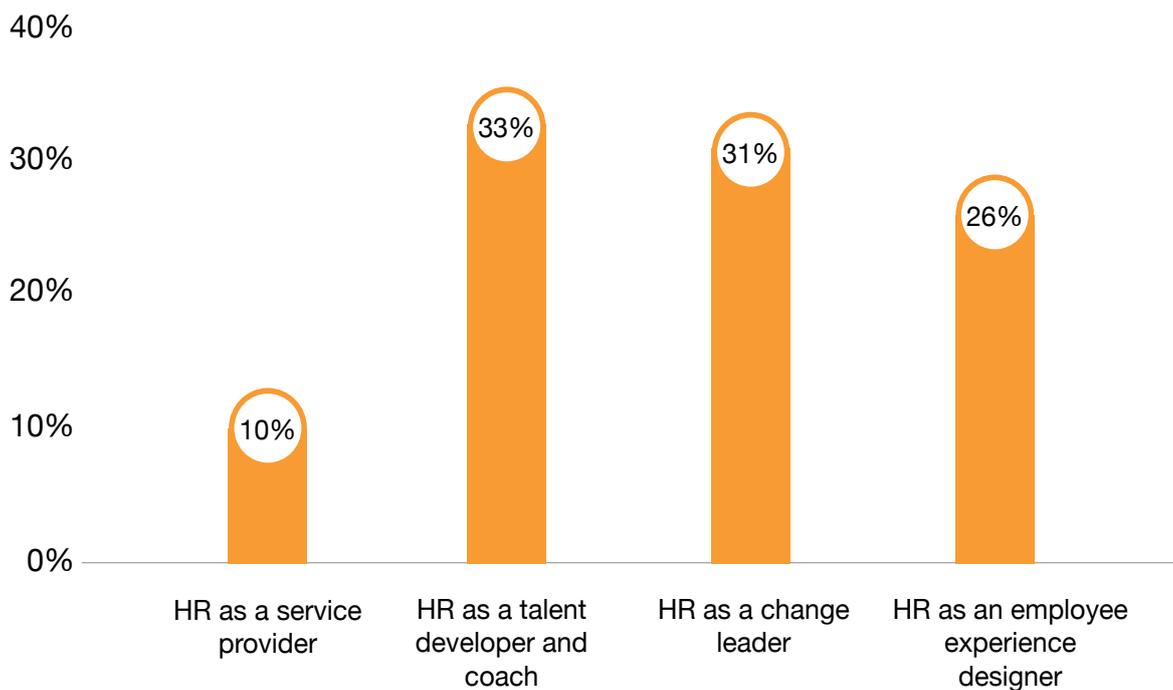
Routine back-office HR functions and services such as payroll are often still carried out using manual processes and are the most likely to be automated using digital tools. For this reason, most HR functions in the Middle East are at the stage of using technology for efficiency and automation rather than innovation.

While this means HR teams may not be fully contributing to the digital transformation of the organisation as a whole, greater automation is still a positive change. Survey respondents believe the future focus of HR functions should be developing and coaching talent (33%), followed by promoting organisational change (31%). Only 10% of participants believe the focus should be on acting as a provider of HR services. However, only 26% of respondents believe HR should evolve in the future to an employee experience designer, arguably the most advanced role in a world enabled by digital HR technologies and mindsets.

Using digital tools to carry out repetitive administrative tasks helps shift the focus of HR in a more strategic direction. It also drives upskilling. Digitising high-volume transactions allows for a reduction of manpower and changes the skill set required – companies upskill employees to manage the technologies.

In what direction do you believe the HR function should change in the future?

40%	
30%	33% 31%
20%	26%
10%	10%
0%	
	HR as a service provider · HR as a talent developer and coach · HR as a change leader · HR as an employee experience designer

Source: PwC, Middle East Digital HR Survey 2020

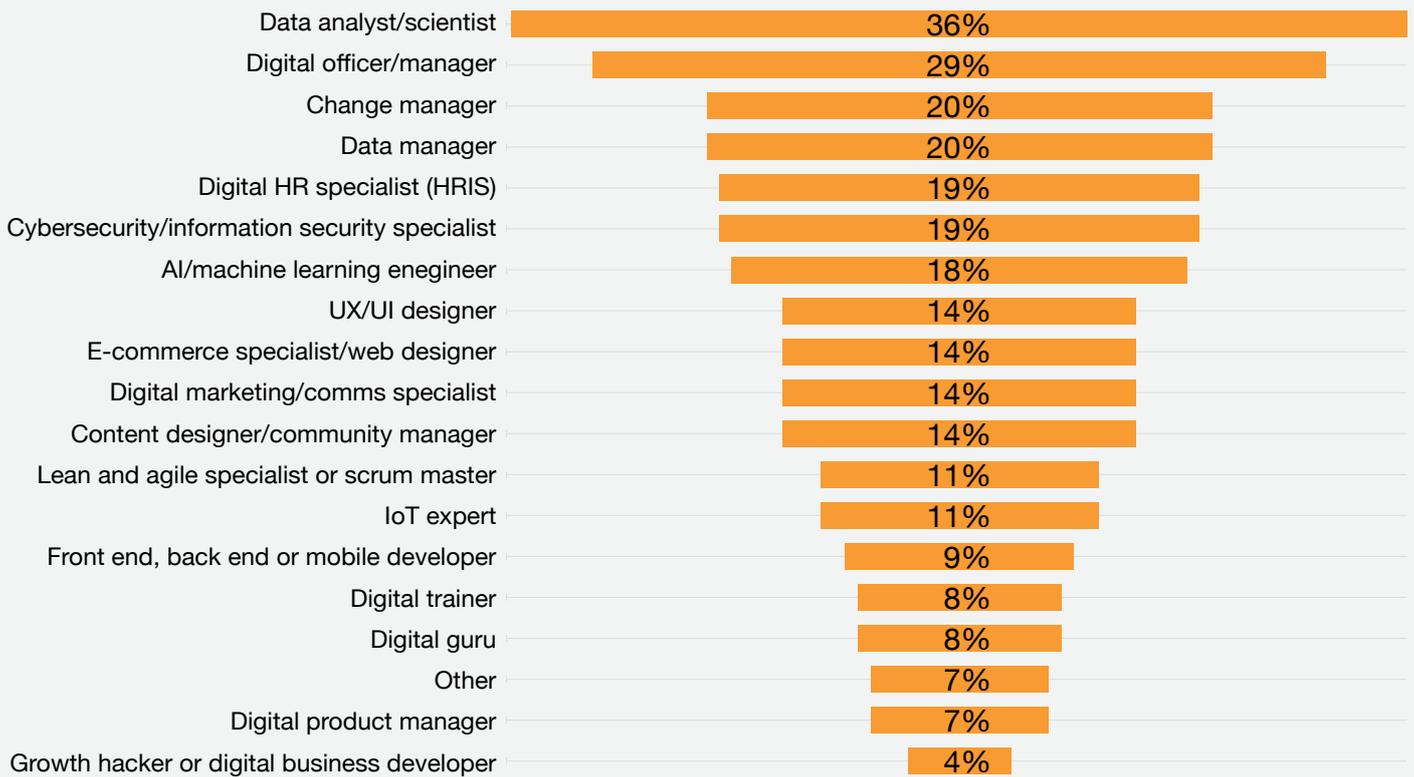**Only 26%** believe that HR should focus on designing employee experiences

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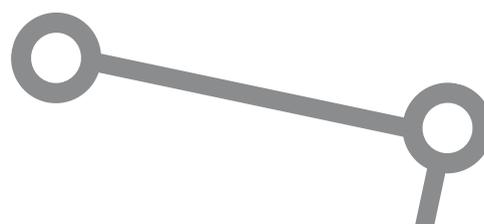
3

Digital HR talent: hiring and development

- Our survey showed data analysts, digital officers and change managers are the most popular new digital HR roles that companies are recruiting

- The education sector and the innovation ecosystem in the Middle East are not leveraged for digital roles the way they are in more digitally mature markets

- Social platforms are twice as likely as any other channel to be used to recruit for digital roles

- Flexibility, culture and leadership are critical for attracting, engaging and retaining digital hires
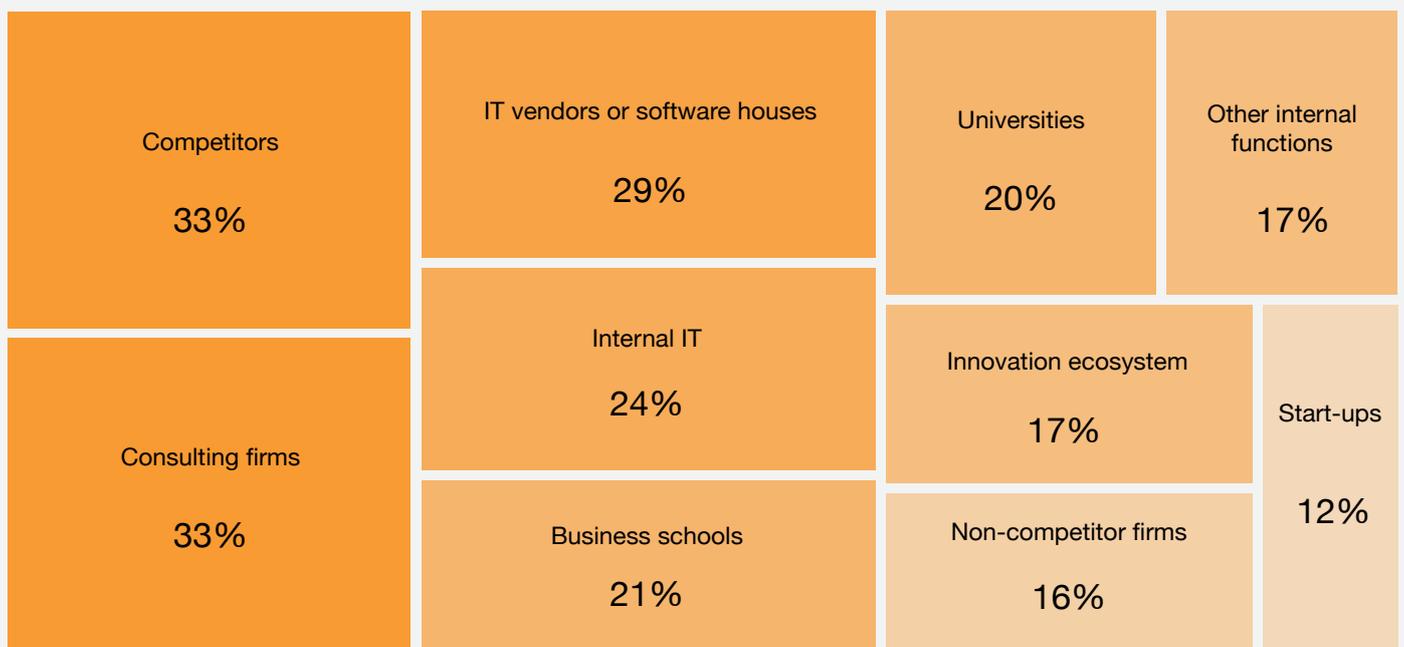
What are the new roles that your organisation is creating and/or recruiting for?

Role	Percentage
Data analyst/scientist	36%
Digital officer/manager	29%
Change manager	20%
Data manager	20%
Digital HR specialist (HRIS)	19%
Cybersecurity/information security specialist	19%
AI/machine learning enegineer	18%
UX/UI designer	14%
E-commerce specialist/web designer	14%
Digital marketing/comms specialist	14%
Content designer/community manager	14%
Lean and agile specialist or scrum master	11%
IoT expert	11%
Front end, back end or mobile developer	9%
Digital trainer	8%
Digital guru	8%
Other	7%
Digital product manager	7%
Growth hacker or digital business developer	4%

Note: Answers add up to more than 100% because respondents were asked to choose 'all that apply'.
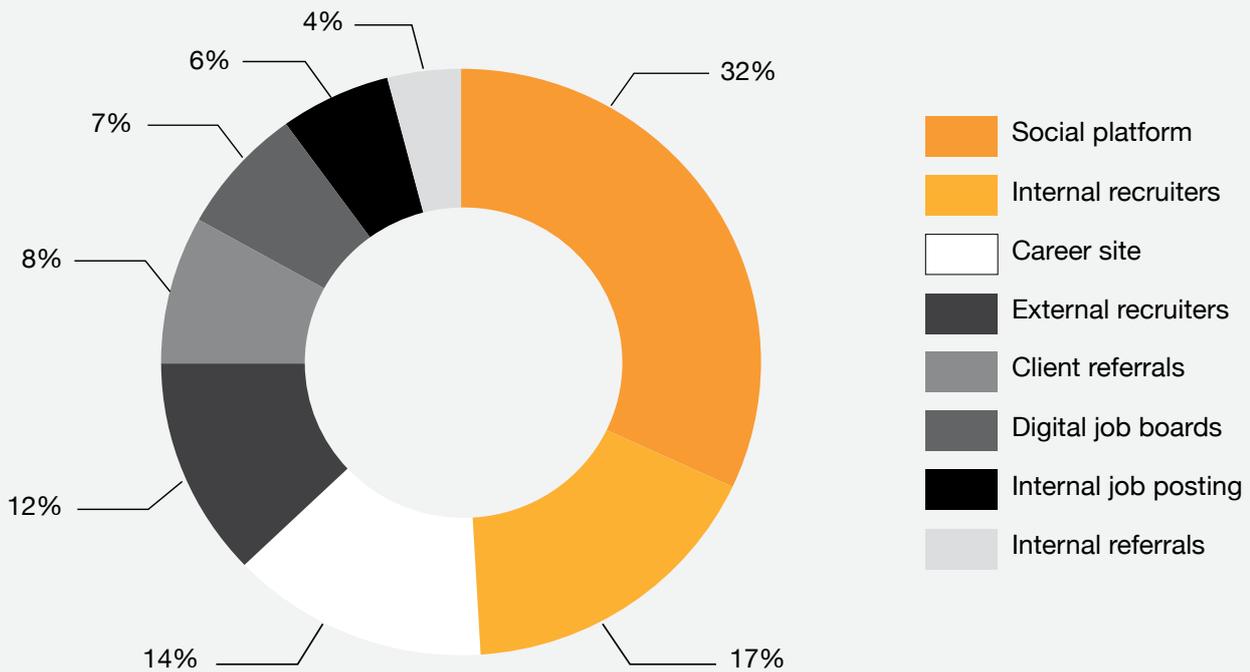
Source: PwC, Middle East Digital HR Survey 2020

Where do you mostly recruit digital roles from?

Category	Percentage
Competitors	33%
Consulting firms	33%
IT vendors or software houses	29%
Internal IT	24%
Business schools	21%
Universities	20%
Other internal functions	17%
Innovation ecosystem	17%
Non-competitor firms	16%
Start-ups	12%

Note: Answers add up to more than 100% because respondents were asked to choose 'all that apply'.

Source: PwC, Middle East Digital HR Survey 2020

Which channel do you currently use to recruit digital roles?

Legend:
- Social platform — 32%
- Internal recruiters — 17%
- Career site — 14%
- External recruiters — 12%
- Client referrals — 8%
- Digital job boards — 7%
- Internal job posting — 6%
- Internal referrals — 4%

Source: PwC, Middle East Digital HR Survey 2020

How will you attract, engage and retain new employees who are focused on digital?

Category	%
Flexibility in the workplace	17%
Leadership culture and behaviour	14%
Personal development (job rotation, secondments)	14%
Salary and incentives	11%
Training	10%
Rapid vertical career trajectory	8%
Work/life balance	8%
Employer brand	8%
Welfare and benefits	5%
Corporate social responsibility	5%
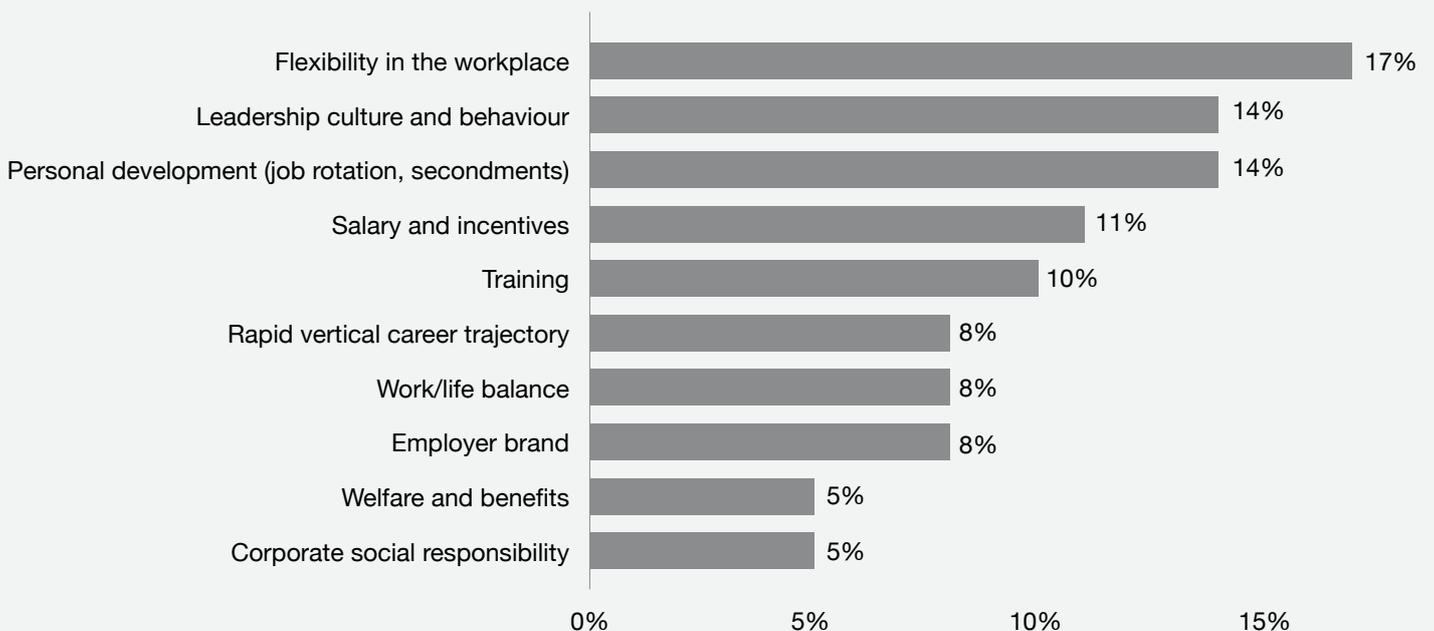
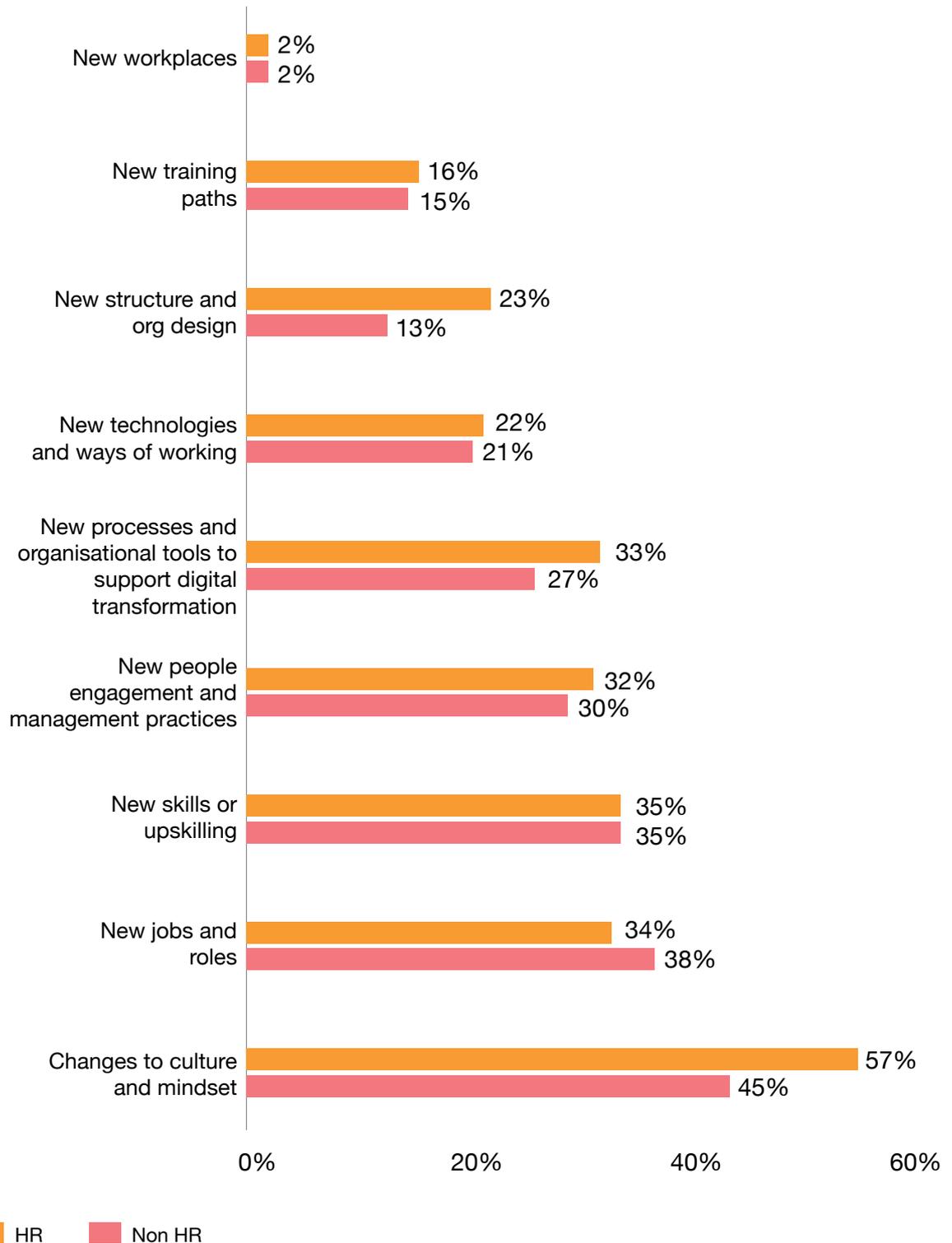*Source: PwC, Middle East Digital HR Survey 2020*

4 Enablers and barriers to digital HR transformation

Our survey identified a number of obstacles that must be overcome in order to turn HR into a business function that leverages digital tools to shape people strategy, rather than serve as a provider of routine recruitment and personnel tasks. Mindset barriers and unwillingness to change are cited as the biggest obstacles to digital transformation across the organisation (55%), closely followed by budget restrictions (51%) and a lack of clarity over what digital transformation really means (48%). Abdulaziz Alshehri, Chief HR Officer at Saudi Arabian technology company Tabadul, believes **there is still a lack of understanding of the benefits of digital HR processes among CEOs and other senior executives in the region**.

Crucially, survey respondents believe that as a result of digital transformation the HR function will be integral in driving changes to mindset and culture. This is a substantial shift from the current focus of HR departments on simply digitalising HR processes. Companies also recognise the importance of digital upskilling. Hiring for new digital roles and developing digital skills within the organisation were identified as second and third priorities by the survey.

What changes will the CXOs and line managers request from HR as a result of digital transformation?

Category	HR	Non HR
New workplaces	2%	2%
New training paths	16%	15%
New structure and org design	23%	13%
New technologies and ways of working	22%	21%
New processes and organisational tools to support digital transformation	33%	27%
New people engagement and management practices	32%	30%
New skills or upskilling	35%	35%
New jobs and roles	34%	38%
Changes to culture and mindset	57%	45%

■ HR   ■ Non HR

Note: Answers add up to more than 100% because respondents were asked to select up to three choices.

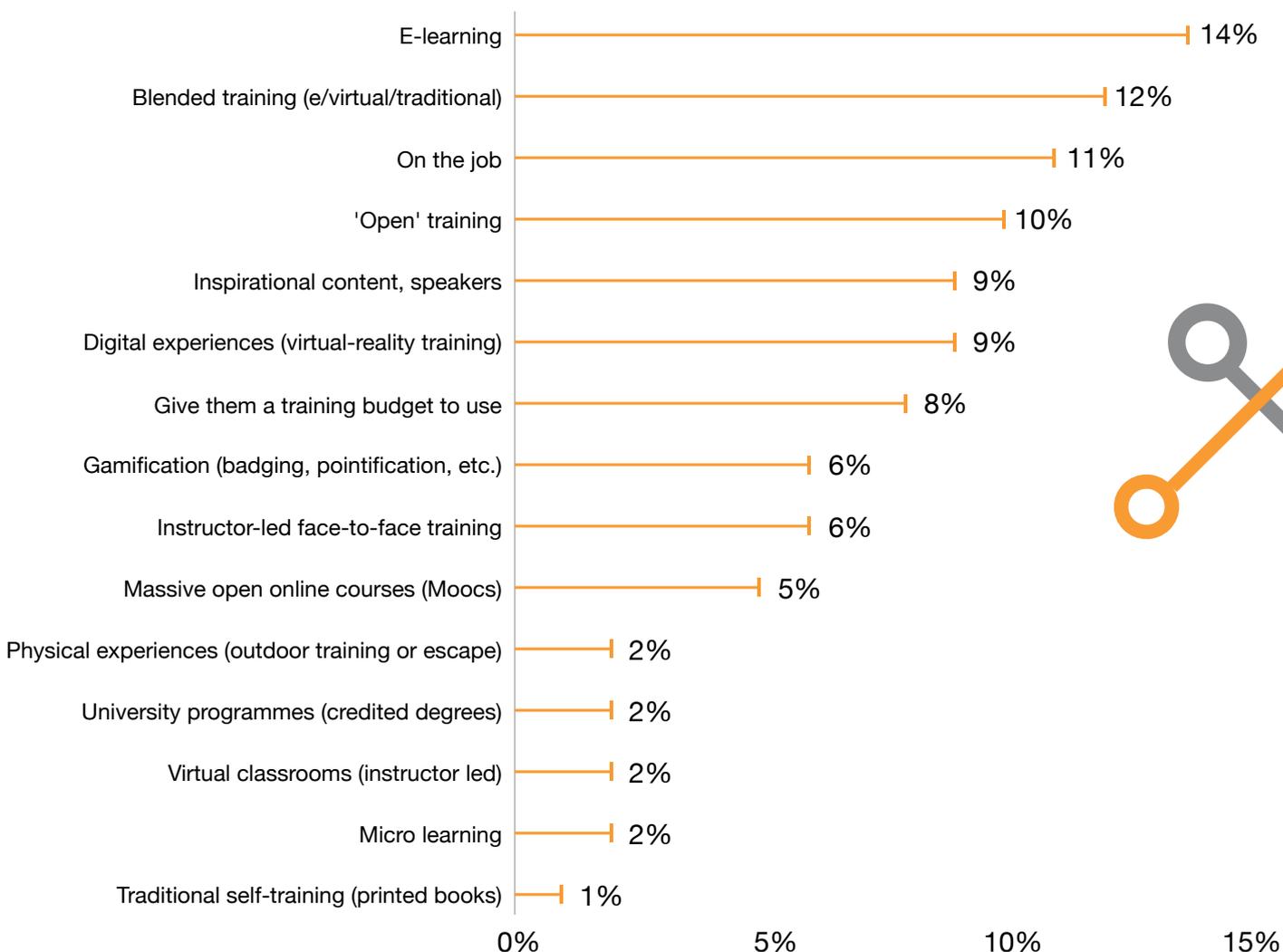*Source: PwC, Middle East Digital HR Survey 2020*

Some respondents noted that organisations may be reluctant to digitalise HR processes because that would lead to job losses conflicting with many nationalisation programmes present across the Gulf. Yet as one interviewee, Banafsheh Azizi, COO of the Kuwait Association for the Care of Children in Hospital and Bayt Abdullah Children's Hospice observed, **it is to the benefit of organisations to help develop human capacity – build and increase the digital skills of employees and continuously support them with their professional development, both now and in the future**.

Upskilling holds the key

All respondents identified digital upskilling as critical to enabling digital transformation. After that, selected choices varied to some extent pre-COVID-19 and during the pandemic. Pre-COVID-19, participants attached more importance to agile ways of working and defining innovation and digital transformation governance. During COVID-19, participants prioritised a flat and flexible organisational structure and recruitment of digital skills.

Asked how they plan to train and develop new employees in digital roles, the top-rated choices were e-learning, blended learning (a combination of virtual and traditional training) and on-the-job learning.

How will you train and develop new employees who are focused on digital?

Category	Percentage
E-learning	14%
Blended training (e/virtual/traditional)	12%
On the job	11%
'Open' training	10%
Inspirational content, speakers	9%
Digital experiences (virtual-reality training)	9%
Give them a training budget to use	8%
Gamification (badging, pointification, etc.)	6%
Instructor-led face-to-face training	6%
Massive open online courses (Moocs)	5%
Physical experiences (outdoor training or escape)	2%
University programmes (credited degrees)	2%
Virtual classrooms (instructor led)	2%
Micro learning	2%
Traditional self-training (printed books)	1%

Source: PwC, Middle East Digital HR Survey 2020

It is striking that whereas e-learning was selected as the top training method, micro-learning was selected as the second last. This contrast indicates a possible lack of understanding of micro-learning – an increasingly common format of e-learning made up of short, highly-focused units. Overall, the findings suggest there is scope for innovation in the learning and skills development space.

Recommendations from Middle East executives
Advice to HR leaders seeking to make digitalisation of HR a priority for their CEOs

Have a financial goal as well as an operational one

Automating processes frees up admin staff to carry out value-creating tasks, or brings down headcount and need for office space.

Highlight oversight benefits

Daily dashboards of employee performance metrics delivered to leadership teams paint a real-time picture of where issues are occurring.

Show the potential in talent acquisition and retention

Using AI in CV screening can speed up recruitment and digital processes provide a better service to employees, with clear oversight of career development.

5 Conclusion

Our survey, conducted while COVID-19 severely disrupted how companies normally work, shows that HR functions in the Middle East still have a significant opportunity to use digital technology to play a key role in their organisation's broader digital transformation, as well as further automating processes such as CV screening, assessments and training.

Seizing this opportunity will turn HR into a more proactive function, which survey respondents have identified as a key priority for organisations across the region. As automating the most day-to-day HR processes becomes a given, staff trained with the right skills can instead spend their time managing every step of the employee experience and identifying skills gaps ahead of time, using digital tools. Building up these capabilities will still involve hiring outside digital HR talent and leveraging this infusion of external capabilities to boost upskilling of own HR employees – internal digital HR capability-building remains key to successful digitalisation.

The biggest obstacle to digital transformation is changing deeply-rooted organisational mindsets that may regard digitalisation as a means to cut jobs, while remaining unsure of how to implement it and unaware of all the potential benefits. Our survey responses show that leaders expect HR departments to help address these cultural barriers. Doing so will require all their expertise in managing the human aspect of organisational change, through incentives that motivate employees to change their behaviours to ensure that digital transformation succeeds.

Key takeaways

Overall digital maturity

- The top factor considered by organisations in determining which technologies to implement is a clear business case

- CEOs sponsor digital initiatives 4 to 10 times more often than any other C-level or senior executives

- There is a general lack of awareness of what emerging digital technologies can really do for businesses

Digital HR maturity

- HR functions in the Middle East are using technology for efficiency and automation rather than innovation

- Recruiting and employer branding are most likely to be impacted by digital disruption

- HR is the function that needs most digital reskilling in the organisation, followed by finance and procurement

- 64% of respondents believe HR should evolve into a talent developer and a change leader in the organisation

- Transactional HR activities (e.g. back office, payroll and employee relations) will soon become obsolete due to digitalisation, shifting the focus of HR in a more strategic direction (e.g. talent developer and coach)

- Digitalisation of HR processes and services is considered HR's biggest contribution to the digital transformation of the organisation
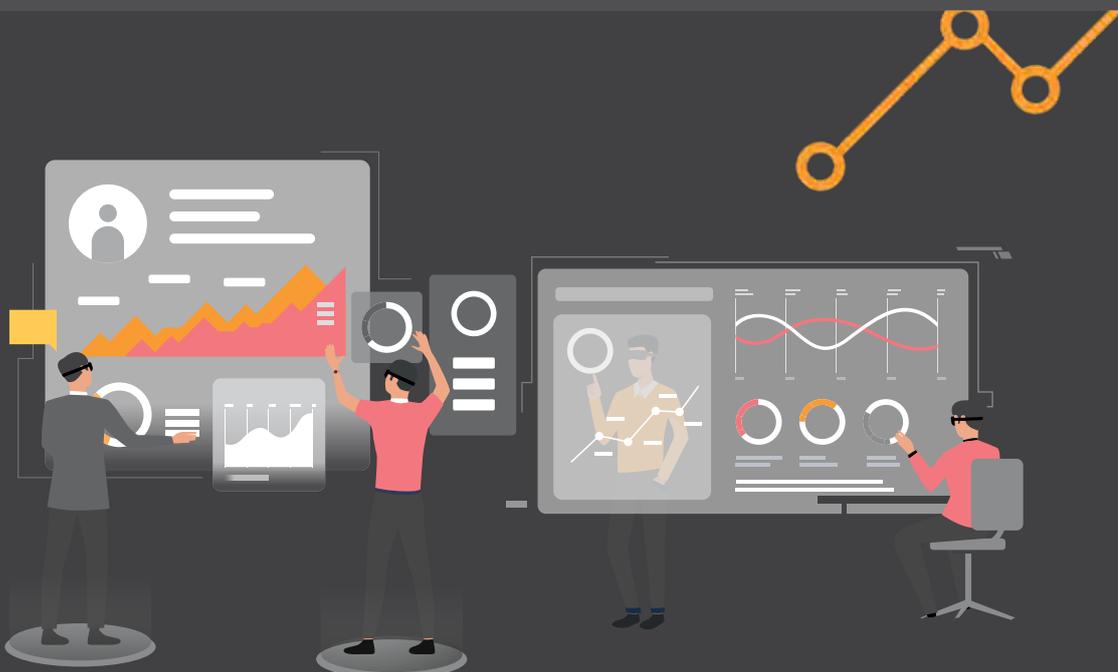
Digital HR talent: acquisition, development and retention

- Talent data analysts, digital officers and change managers are the most popular new digital HR roles that companies are hiring for

- The education sector and the innovation ecosystem in the Middle East are not leveraged for digital roles the way they are in more digitally mature markets

- Social platforms are twice as likely as any other channel to be used to recruit for digital HR roles

- Flexibility, culture and leadership are critical for attracting, engaging and retaining digital HR hires

Barriers and enablers towards digital HR transformation

- Mindset barriers and unwillingness to change are major obstacles impeding digital transformation in 55% of organisations

- Digital transformation will drive changes in culture and mindset

- Digital HR transformation is enabled primarily by upskilling from within and acquiring outside digital HR talent, as well as through flat, flexible, non-hierarchical organisational environments

- E-learning and blended learning: in digital skills development, new technologies and methods have not yet been integrated

COVID-19 as a catalyst for change

- COVID-19 has accelerated digital transformation in 72% of the organisations surveyed

- Organisations are offering more flexible ways of working to support the productivity of employees, as a result of the changes brought about by COVID-19

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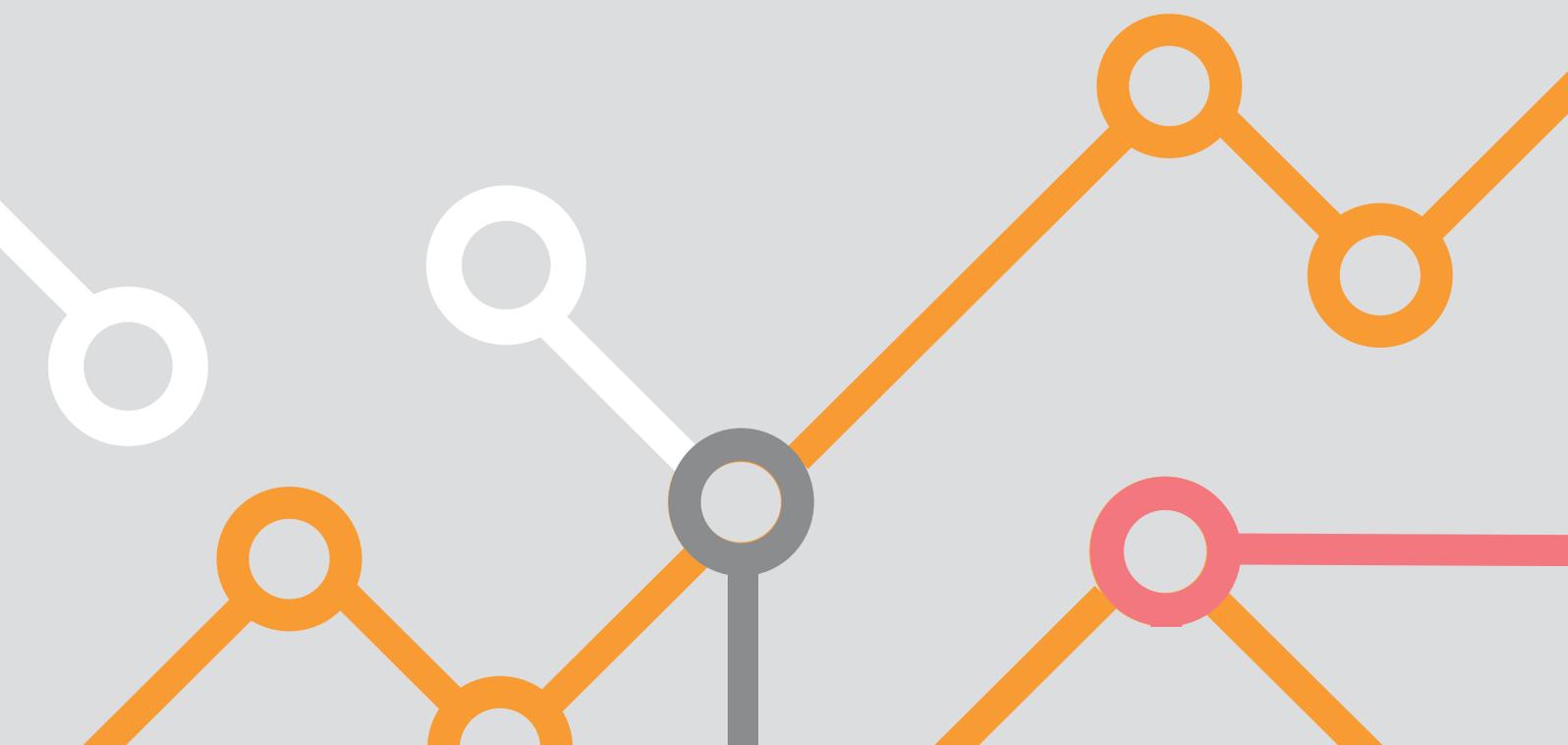
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