




pwc

Remote-Ability

A call to action for organisations to capitalise on the rise of remote ways of working, and transform the employment prospects of People With Disabilities in the GCC

New World. New Skills.





“Embracing diversity and inclusion makes business sense and more importantly is the right thing to do. By sharing experiences and ideas, we can all learn from each other and drive the change we need.”

Bob Moritz, PwC Global Chairman

Foreword



Countries in the Gulf Cooperation Council (GCC) region have an opportunity to build inclusive labour markets and realise the full potential of their people. As economies continue their rapid growth and transition towards a knowledge economy, the nature of work and the people needed to enable it continue to evolve and adapt. The current context has made way for a flexible and digitally-enabled employment structure, creating a “remote economy”.

This transition provides opportunities for the inclusion of key segments of society. As organisations in the public and private sectors refresh their labour and workforce policies and strategies, an important segment needs to be considered: people with disabilities.

Over the past decade, the Middle East has achieved great progress with regard to laws and regulations facilitating the access of people with disabilities to public services, while simultaneously ensuring fair and decent treatment. Nevertheless, available data tells us that much remains to be done with their current employment prospects.

Our New world. New skills. campaign focuses on embracing the new world, celebrating differences, promoting diversity and unleashing the skills needed for the future. Policymakers today have a golden opportunity to achieve a successful transition to inclusive and high-skill equilibrium labour markets, in which vulnerable segments are able to overcome inclusion and skill barriers and feel empowered.

In this paper, we examine the current situation of people with disabilities, identify the barriers to their effective participation and provide a set of steps and interventions that will support their inclusion in the labour market. For this approach to be successful, GCC leaders, policymakers, educators and stakeholders from the public, private and non-profit sectors need to work hand-in-hand to create an inclusive ecosystem for people with disabilities and to ensure their voices are heard along the way.

Randa Bahsoun

Partner, New world. New skills. Leader
PwC Middle East



A new world with greater opportunities



The world is at a tipping point, moving towards a new reality characterised by technological upheaval, remote communication and collaboration, and an increasingly connected business ecosystem. These disruptions have changed the way we live, think and interact, advancing the emergence of a new “remote economy” driven by emerging digital technologies. In recent years, the Middle East has been at the forefront of this transition, with GCC countries making major digital infrastructure investments to achieve their goal of creating highly skilled, knowledge-based economies. The COVID-19 pandemic has accelerated this trend, due to the sudden, enforced shift by millions of employees to working remotely from home. At the same time, the slowdown triggered by COVID-19 and the prospect of further job losses have highlighted the urgency in the Middle East, as globally, of equipping citizens with the necessary channels and skills for the digital age to find secure, rewarding employment.

In this rapidly evolving economic landscape, it is alarming that the digital divide remains and even grows for people with disabilities (PWD), a large, frequently overlooked group who represent around 15% of the world's population, according to UN estimates.

The UN defines PWD as individuals “who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others”.

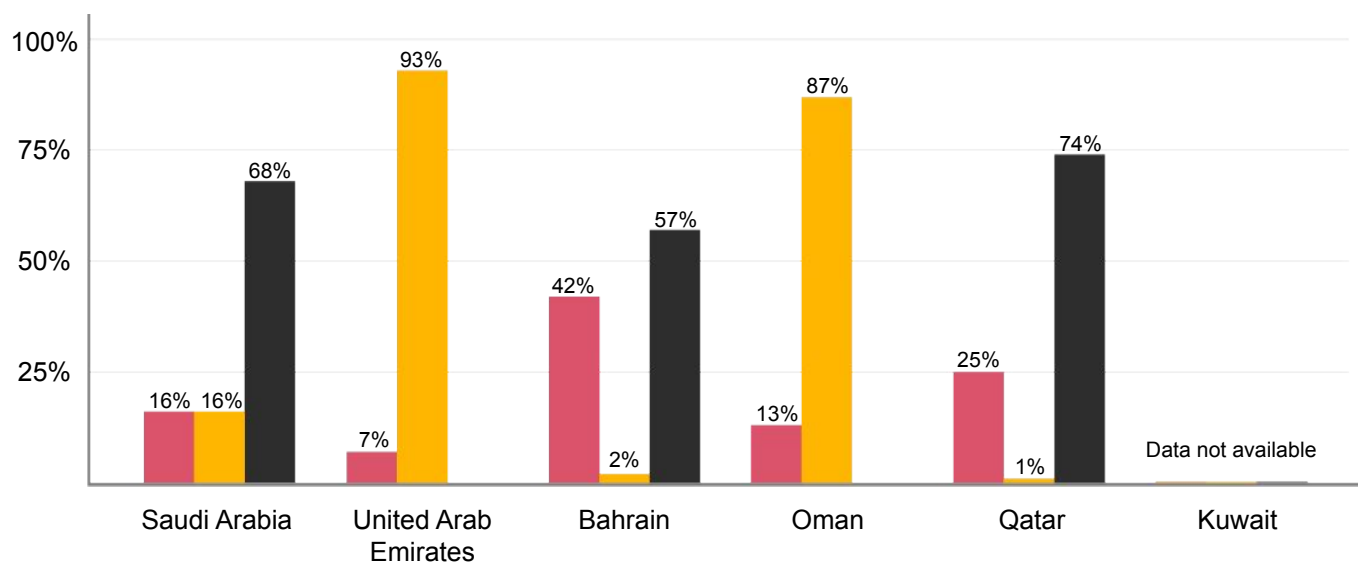
More than half of PWD of working age in industrialised countries are unemployed, rising to between 80% and 90% in developing countries^[1]. It is important to note too that working age women with disabilities are doubly disadvantaged in labour markets, on account of both their gender and their disability.

The most recent figures show the number of PWD in individual GCC countries ranges from 4.37% of the population in Saudi Arabia to between 1% and 3% for the other member states. It is a hazardous exercise understanding the specific circumstances of PWD in different GCC member states, in part because of different national definitions and data sets for PWD. In fact, there is a **lack of concrete and consistent data** showing the true scale of disabilities across the GCC. These inconsistencies are due to significant variations in the definitions used to refer to PWD; cultural differences regarding attitudes to PWD; and differences in target samples and data gathering practices. All these factors hinder our ability to fully understand the PWD landscape at both international and national levels. What is clear is that PWD face severe labour market challenges throughout the GCC region.



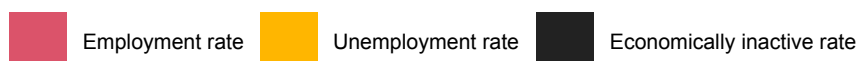
^[1] United Nations, Department of Economic and Social Affairs, “Disability and Employment Factsheet”, November 2007.

Labour participation rates of PWD in the GCC^[2]



PwC Analysis

Sample years: Saudi Arabia 2016, UAE 2019, Bahrain 2014, Oman 2010 and Qatar 2010.



In recent years, GCC governments have committed to improving the employment prospects of PWD and to increasing their participation in the workforce. The rise of remote working, accelerated by COVID-19, brings opportunities for member states to upskill, empower and integrate PWD into the labour market. This paper provides a practical guide to how governments and public and private-sector organisations can leverage the new “remote economy” to overcome some of the barriers to the integration of PWD into the workforce.

Employment barriers for PWD

Societal: prejudice among employers and the general public about the ability of PWD to perform a specific job or properly integrate within the organisation or community.

Environmental: man-made or natural barriers that obstruct PWD’s mobility and access to the workplace, including a lack of appropriate communication systems.

Institutional and regulatory: policies, laws and restrictions that unintentionally discriminate against PWD by not actively taking their needs into account.

Skills: lack of equal access by PWD to education and vocational training, and lack of awareness and commitment by employers to train employees to work effectively with PWD.

Digital: Lack of everyday access by PWD to digital opportunities related to economic and workforce development, education, healthcare, public safety and emergency services, civic engagement and social networking.

^[2] Disability in the Arab Region 2018, Economic and Social Commission for Western Asia | Qatar Planning and Statistics Authority Report 2019 | Community Outreach in Oman 2017



The time is now

The COVID-19 pandemic has forced public and private-sector organisations to embrace remote, digital ways of working that are accelerating the emergence of a new digitally based “remote economy”. This shift to remote working, combined with a focus on upskilling, could help break down some of the barriers that limit PWD participation in the workforce; for example, online learning can help PWD develop the skills that are needed to perform a certain task, regardless of physical ability.

At the same time, the pandemic has reinforced both the economic and social imperatives for increasing access to labour markets for PWD. Economically, PWD are a grossly underestimated resource. With the right policy framework and a supportive environment, PWD have the potential to be productive members of the workforce who contribute to their country’s wealth. Socially, COVID-19 has exacerbated the disadvantages and discrimination suffered by vulnerable groups and re-ignited the social contract for governments, compelling countries to re-examine their current practices around social development, social security and wellbeing. Both these imperatives call for urgent action now.

In this context, GCC countries are well placed to transform labour market access for PWD and act as models of best practice for other governments. Firstly, in recent years the UAE, Saudi Arabia and other GCC governments have launched programmes to break down traditional prejudices against PWD and increase their employment opportunities. Secondly, during last year’s COVID-19 lockdowns, GCC countries proved themselves digitally prepared for the sudden transition to remote working due to their major, on-going investments in information and communication technology (ICT).



In Saudi Arabia, the government and the private sector have invested around \$15bn since 2017 in ICT, as a step towards realising the Digital Saudi 2030 vision.



In the UAE, ICT spending is projected to grow at a compound annual growth rate of 8% between 2019 and 2024, to reach a cumulative total of \$23bn by 2024^[3].



Qatar’s total ICT spending is projected to grow at a compound annual growth rate of 9.2% between 2019 and 2024 to reach a cumulative total of \$9bn^[4].

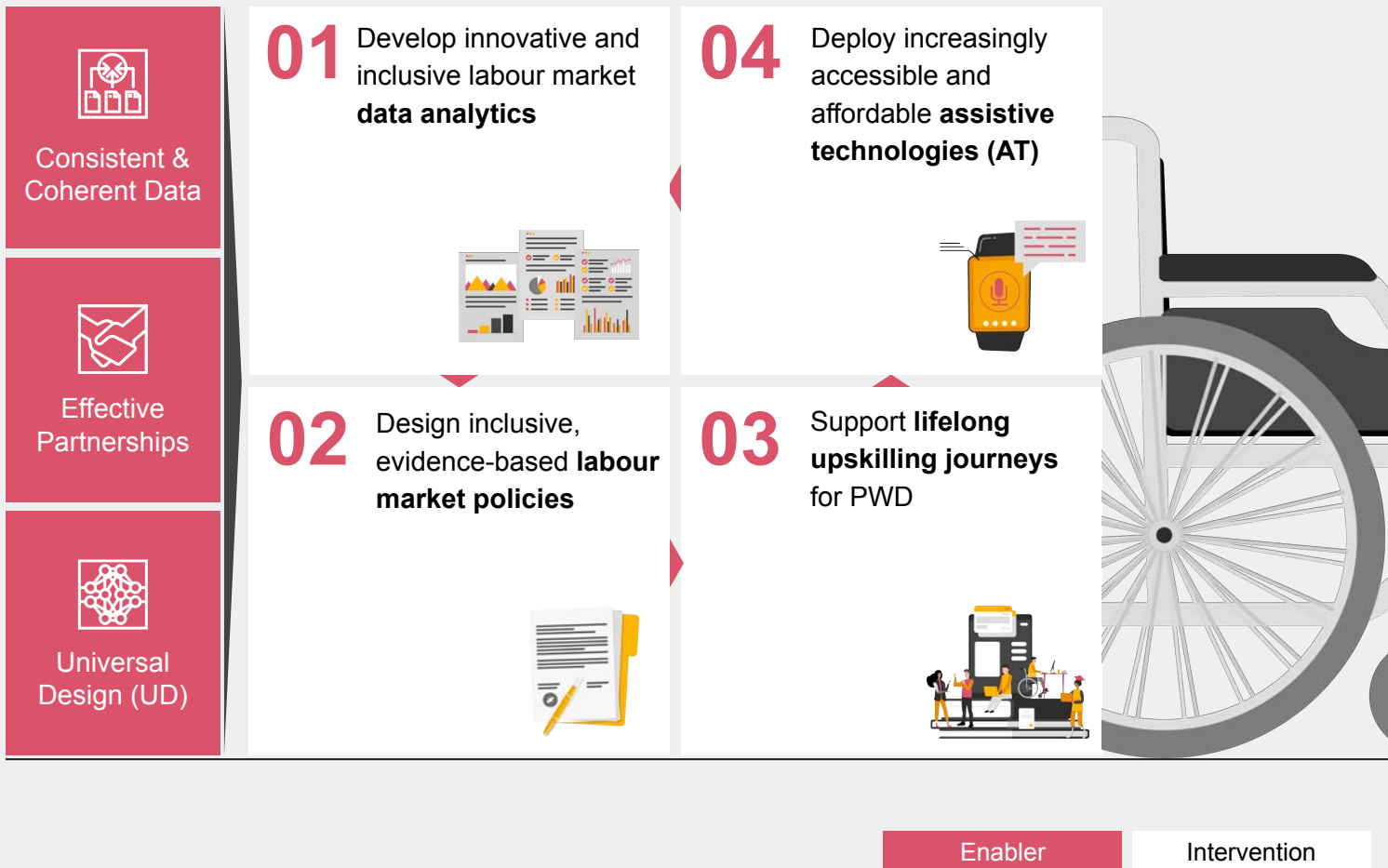
However, across the GCC, the digital divide remains and even increases for PWD. GCC member countries need to leverage their ICT capacity to further promote remote working practices as the foundation for a coherent, effective labour market inclusion framework for men and women of working age with disabilities. The rest of this report sets out key steps for PWD labour market inclusion and identifies a series of interventions that will provide PWD with the employment opportunities they deserve in an increasingly digitised future, unlock their immense potential and help them bridge the digital divide and acquire employment skills for the remote economy.

^[3] GlobalData, “ICT spending in UAE will reach US\$23bn by 2024,” 12 March 2020

^[4] GlobalData, “ICT spending in Qatar will reach US\$9bn in 2024”, 10 March 2020.



PWD inclusion framework



This framework is a call to action for GCC leaders, policymakers, educators and stakeholders from the public, private and non-profit sectors. By working together, and effectively leveraging data we can rethink our approach towards PWD inclusion in labour markets, seeing people as potential contributors to the region's future prosperity rather than as a burden on society.

Disclaimer: This call to action does not cover PWD who for different reasons cannot work, despite the importance of this issue.





Three key steps towards inclusive labour markets

Access to consistent and coherent data

A critical pillar in the implementation of a successful inclusion framework for PWD is to establish a well-structured database of key information, including the number of people with disabilities, their specific needs and skills, and their employment status. While digitisation has made data collection and analysis relatively easier, existing decentralisation and fragmentation within the public sector renders it difficult to ensure data coherence. To address this issue and improve the quality and breadth of data available, governments should invest in building the capacity of the national statistics offices, commit to gather disability and gender disaggregated data within regular labour force surveys and ensure employees are equipped with the right skills to conduct more critical evaluations and derive valuable real-time insights.

Having the ability to gather, understand and share information will enable data-driven and evidence-based decision making and policies, remove the unconscious human and societal biases against PWD and their capabilities and drive better understanding of the needs of people with disabilities. This will support the implementation of citizen-centric interventions and foster collaboration between government agencies, private institutions, academics, nonprofits and think tanks. Integrating data will allow them to be better connected and more aware of the initiatives and activities taking place across the public sector.



Effective partnerships

Multi-stakeholder and cross-sectoral partnerships will support governments and other organisations to involve the PWD community, ensure a better and unified understanding of the PWD landscape and maximise the reach and impact of policy reforms and initiatives. PWD have the right to be directly involved in the decision-making process regarding policies and campaigns that affect them. It is self-evident that policies will be improved by engaging with PWD, rather than with policymakers who may have their own unconscious biases when prescribing what is “good” for PWD without consultation. To ensure the widest collaboration with PWD, governments should engage with disabled persons’ organisations (DPOs), NGOs, caregivers and the wider PWD community, adopting PWD’s global slogan for policy inclusion as the benchmark for good practice: **“Nothing about us, without us!”**

Governments should also verify that representative organisations for PWD are led and controlled by people in this group and are accessible to men and women with all types and levels of disability. Partnerships across GCC countries between governments, private-sector organisations, education and training providers and technology companies create a unified, regional purpose for PWDs through the sharing of best practices for their inclusion in areas such as upskilling and access to the right digital tools.

Universal Design (UD)

New policies and initiatives should follow the principles of Universal Design (UD) so they are inclusive and accessible to PWD of both genders and all age groups, regardless of the level of their disability. UD is the process of designing and creating environments and products that are accessible, understandable and practical to all people, regardless of ability, disability, age or any other factor. Today, UD principles are increasingly used in the development of everyday life technologies, on both hardware and software fronts, as well as in education and urban planning.

In this context, governments should be accountable for the accessibility and impact of new policies, decisions and initiatives on PWDs. They should also seek partnerships with organisations that are already embedding UD within their product development process.





Four key interventions for governments and employers to help PWD realise their potential

Develop innovative and inclusive labour market data analytics



Data analytics and science have been at the forefront of technological advances in recent years. New ways of analysing data, supported by Artificial Intelligence algorithms and statistical models, allow for a better understanding of current situations, more accurate predictions of future needs and trends and ultimately stronger evidence to support decision-making and policy design.

In the case study below, we demonstrate one of the many examples of how data could help identify work opportunities for PWD by defining jobs and occupations that can be performed remotely. This data could in turn be used to improve and inform policies for flexible working arrangements. The example considers remote productivity and human interaction as metrics. Similar approaches could be used to gather different employment insights for PWD.

Remote work potential for PWD

PwC carried out an exercise using a business resilience model created by one of our global partners, FAETHM, an Australia-based augmented analytics platform. The business resilience model is targeted at identifying jobs at risk of being impacted by the COVID-19 pandemic.

The model identifies jobs using two key metrics:

The degree of remote productivity

representing the extent to which a job can be performed remotely via enabling technologies, based on the underlying tasks.



The degree of human interaction

representing the level of physically present human interaction required to perform a job.



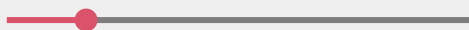
Analysing jobs at a task level increases the granularity and accuracy of these metrics. When plotting both metrics for jobs across various sectors and industries, FAETHM identified at-risk COVID-19 jobs. This same analysis can be leveraged to identify the remote and inclusion potential of certain jobs for people with various types of disabilities. Using this approach we have identified four types of PWD inclusion potential for different categories of jobs (see below).

PwC's and FAETHM's analysis only provides **suggestions** for jobs that could be performed by PWD with different types of disability. Nonetheless, it illustrates how public and private-sector organisations can combine accurate, timely data on PWD with analytics to develop a data-enabled job-matching ecosystem that can support the hiring of PWD by identifying suitable jobs that meet their professional aspirations and the skills required by the employer.



Jobs with high potential for inclusion of PWD with physical, mental or multiple disabilities:

Low level of human interaction:



High potential to be performed remotely:



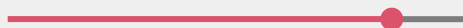
Examples of suitable PWD: people with severe or multiple disabilities, with unimpacted mental ability

Examples of jobs: graphic designers, economists, programmers and software development professionals, IT operations technicians

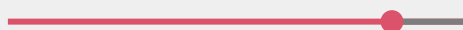


Jobs with inclusion potential for PWD with visual impairment or other physical disabilities:

High level of human interaction:



High potential to be performed remotely:



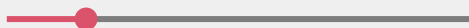
Examples of suitable PWD: wheelchair users, amputees, visually disabled

Examples of jobs: public relations professionals, psychologists, human resource managers and directors, careers advisors, higher education teaching professionals, telephone salespersons, counsellors

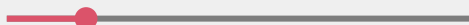


Jobs with Inclusion Potential for PWD with cognitive, hearing or psychological disabilities:

Low level of human interaction:



Low potential to be performed remotely:



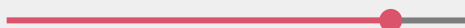
Examples of suitable PWD: people with hearing disabilities or mild autism disorders

Examples of jobs: property inspectors and investigators, electricians and electrical fitters, gardeners and landscape gardeners, conservation professionals, engineering technicians, air traffic controllers, chefs and cooks, postal workers and mail sorters, pharmaceutical technicians, biological scientists and biochemists, carpenters and joiners, medical radiographers

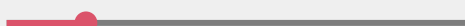


Jobs with low inclusion potential:

High level of human interaction:



Low potential to be performed remotely:



Examples of suitable PWD: people with mild disabilities and strong working capabilities

Examples of jobs: cashiers, nurses, doctors, healthcare workers, bus drivers, flight attendants, dental nurses, cleaners, air travel assistants, podiatrists, midwives, publicans and managers of licensed premises, hairdressing and beauty salon proprietors, retail cashiers and checkout operators, prison service officers, security guards, leisure and sports managers

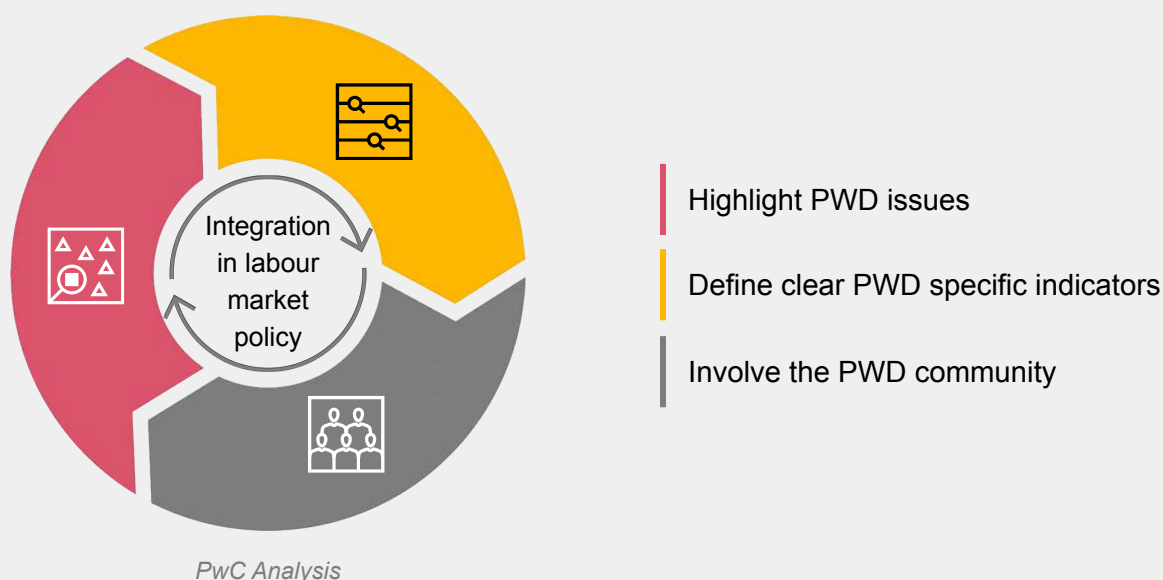


Design inclusive and evidence based labour market policies



Labour market policies aim to achieve specific employment and labour goals, addressing both supply and demand constraints. It is therefore critical that equality and non-discrimination, including disability issues, are fully integrated in policy formulation. Core PWD inclusion consists of embedding PWD challenges and barriers within the policy making process, identifying disability-specific indicators to assess, implement and monitor policies, and engaging with PWD representatives throughout the policy cycle.

Key steps for the integration of PWD in the labour market policy cycle



Barriers to employment for PWD deserve particular attention when analysing the different forces that affect the structure and performance of labour markets. These barriers should receive as much attention as other issues such as low female participation and workforce localisation. For example, governments should ensure that policies targeting PWD provide support both for those who are unable to work and those who want to join the labour force. Support for the second group can take many forms, such as incentives for employers to subsidise wages, suitable accommodation for PWD and, most importantly, access to upskilling and lifelong learning.

GCC governments should use evidence-based approaches to define or reform their labour policies and provide equal employment opportunities for PWD. Clear socio-economic indicators and targets which disaggregate disability and gender will help governments assess the effectiveness, cost and impact of policies. These PWD indicators could include employment and economic activity rates, education and upskilling numbers and data on benefits for PWD such as disability allowances and health insurance.

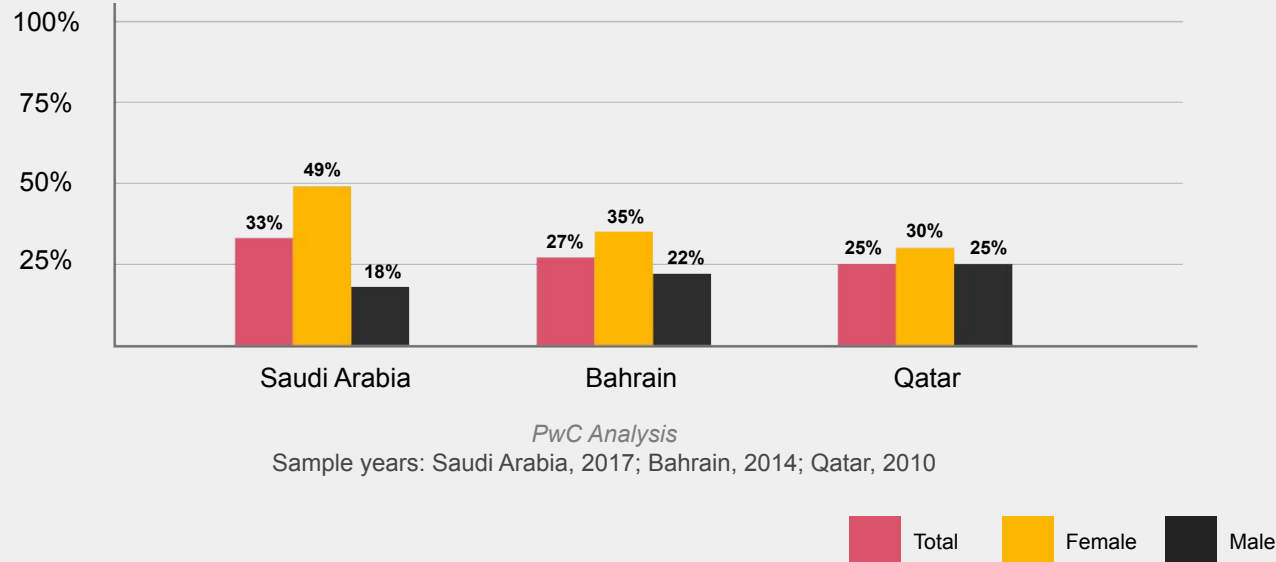
Moreover, at every stage in policy formulation and implementation, policymakers should engage collaboratively with the PWD community on an equal footing through partnerships with PWD groups, NGOs and other representative organisations. PWD should be involved regardless of gender or the level of their disability. Drawing on the input from PWD, all policies should conform to Universal Design principles.



Support lifelong upskilling journeys for PWD

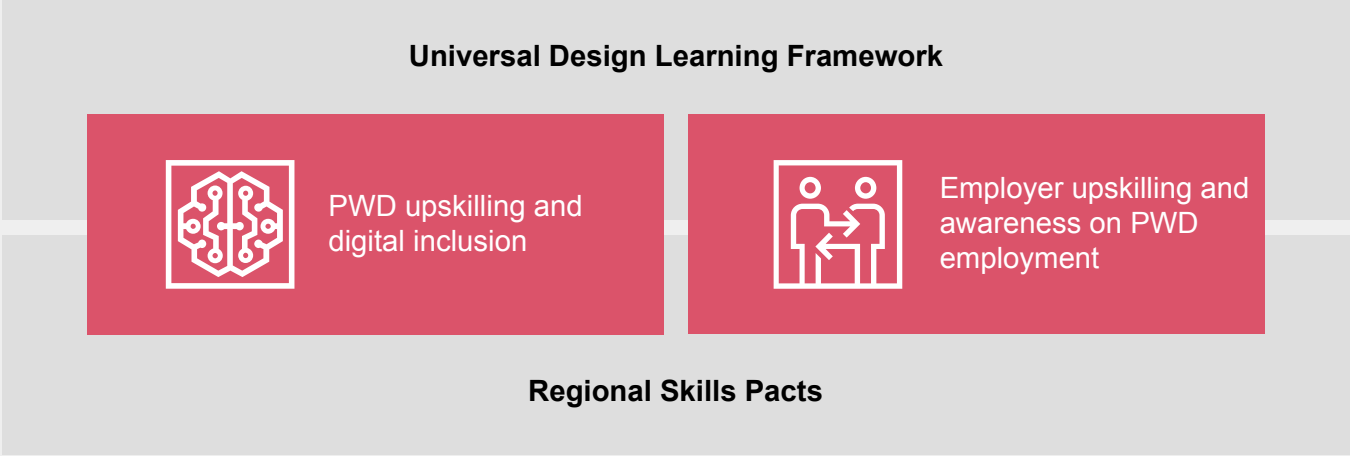
In the digital age, investment in upskilling is increasingly a core strategic priority for public and private-sector organisations worldwide. Across the GCC, governments recognise that upskilling creates opportunities for greater inclusion of previously overlooked groups, including PWD, in labour markets. Yet currently, far too many PWD in the region lack even basic workplace skills. Most are illiterate or have no access to education, with women especially disadvantaged.

Rate of illiteracy and no-schooling in Saudi Arabia, Bahrain and Qatar^[5]



It is a fundamental principle of social cohesion and economic growth that everyone deserves access to good quality vocational training, upskilling and reskilling.

Inclusive upskilling is built around developing the skills of both PWDs and their potential employers and is enabled by an accessible design and strong regional partnerships.



PwC Analysis

^[5] KSA Disability Survey 2017, General Authority for Statistics | Disability in the Arab Region 2018, Economic and Social Commission for Western Asia | Qatar Planning and Statistics Authority Report 2019

To define upskilling opportunities, data on PWD abilities and skills should be gathered. Their current disabilities should be analysed and through tailored assessments cross-checked against the skills required to perform potential jobs in the market. This analysis will enable both PWDs and employers to have more clarity and a better understanding of PWDs' current and potential capabilities in the market.



PWD upskilling and digital inclusion

GCC governments should enable PWD of both genders and across all disability types to pursue an inclusive, lifelong upskilling journey, starting with core literacy and numeracy in the case of the most disadvantaged groups and advancing towards acquiring digital skills that employers increasingly demand in the new remote economy. Remote capability building provides an effective solution for maximum reach and impact of upskilling interventions.

Moreover, life skills such as resilience, self-development, determination and focus are also critical staging posts on this journey. Many PWD are self-evidently people with determination whose personal and cognitive skills have been shaped by their experience of disadvantage. Their determination presents an opportunity for governments to tap into an extremely undervalued talent pool.

Furthermore, supporting PWD in building their digital skills will not only make their skillset more relevant for today's knowledge economy but also give them the ability to use more effectively the increasingly accessible assistive technologies that could support them in their everyday lives.

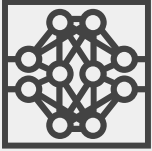


Training employers and employees to work with PWD

Governments and organisations need to train their employees to learn how to work with PWD. Internal learning and development strategies and campaigns should educate employees about the nature of disability, the needs of PWD, the workplace challenges they face and how to mitigate them. Greater awareness will help create a more welcoming environment for PWD and break down common misconceptions.

To ease communication between existing employees and PWD, organisations must train a proportion of their workforce in skills such as sign language and incorporate auxiliary aids for PWD in everyday tasks. Managers should be taught how to better manage the time and effort they devote to employees with disabilities by starting with a positive mindset. They should recognise the abilities and performance of PWD workers and ensure they are empowered to maximise their potential as productive employees. On a technical level, company presentations and reports should utilise screen readers, Braille and sign-language interpretations, transcripts and other assistive technologies to ensure that all PWD employees can understand and interact with the content.





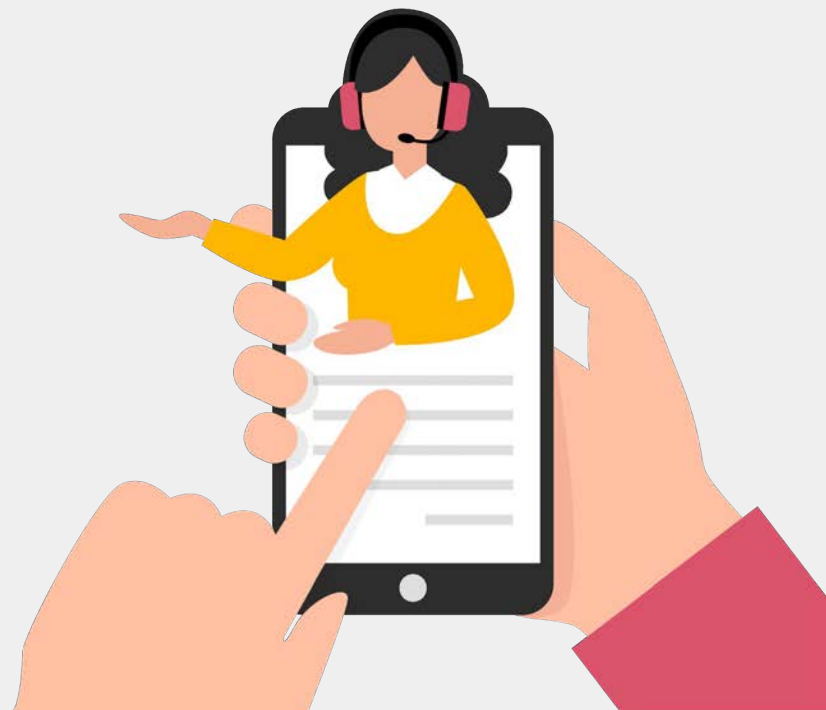
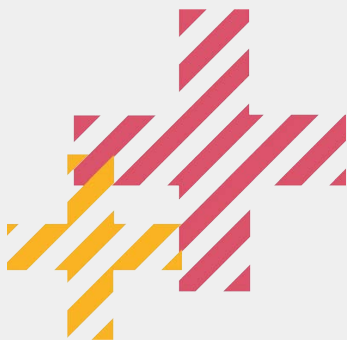
Universal Design for Learning framework

Governments and other institutions should employ the Universal Design for Learning (UDL) framework for upskilling journeys to create an accessible learning environment for PWD, regardless of their disability. Screen readers and other assistive technology tools should be used (*see below*). Instructors must also ensure that the learning content is easy for PWD to follow and that they have enough time to access it.



Regional Skills Pacts^[6] for PWD

It is critical that countries pool resources and expertise when designing and implementing upskilling journeys for PWD. In this respect, the regional skills pacts developed in recent years by the European Union provide a useful template for how to achieve coordinated, targeted upskilling policies for PWD across the GCC. For PWD, similar pacts should encourage GCC governments, Middle East entrepreneurs, research institutions and digital experts to develop curriculums, programmes, tools and software that can help PWD to engage with social and professional platforms and increase their employment prospects.



^[6] European Skills Agenda, European Commission, 2020

Deploy increasingly accessible and affordable assistive technologies



Assistive technologies (AT) are evolving quickly, unlocking new opportunities for social and labour market inclusion of PWD.

Speech conversion to text

Some video conferencing platforms, such as Zoom and Skype, can now provide real-time captioning by creating subtitles for discussions during a virtual meeting.

Speech to sign language

Apps such as Hand Talk instantly transform written text or speech into sign language, delivered by an animated interpreter who conveys the written or spoken message.

Voice activated virtual assistants

Digital assistants such as Apple's Siri or Amazon's Alexa are voice activated and can understand commands and execute actions or tasks.

Online book readers

Platforms such as Natural Reader can upload, type or drag text on to their user-friendly page and instantly convert the text into speech, with the option to stop, replay or download the audio for future use.

Internet of Things (IoT) devices

IoT is the interconnectivity of different objects, platforms and devices through software that allows them to interact and communicate with each other.



Technology companies have started to implement the concept of **Universal Design (UD)** in ATs to make them accessible to all people, regardless of age, disability, gender or other factors. For example, mainstream video-calling tools such as Google Meet and Microsoft Teams now include “transcript” functionalities to convert speech into text. More generally, smartphones and computers increasingly incorporate “assistive” functionalities to help people with disabilities perform key functions. The COVID-19 pandemic has reinforced these trends, with ATs playing a critical role in enabling enforced remote working. During national lockdowns, entire societies have been “disabled”, dealing with mobility constraints, spurring technology companies to develop affordable, accessible ATs targeted at the general population. These ATs, which are usually software-based and easy to download, can also be used by PWD.

Governments should identify the most promising ATs to assist the inclusion of PWD in the labour force and develop partnerships with Microsoft, Google, Apple and other global technology companies. Employers in the GCC region should also be up-to-date about the latest ATs that can ease workplace tasks for PWD. In both cases, the UN's Global Initiative for Inclusive Information and Communication Technologies (G3ict) is relevant for developing best AT practices.

If used effectively and to their full potential, ATs could provide an alternative data source to gather accurate information on the current abilities and disabilities of PWD. This data could then be used as input into innovative and inclusive data analytics to help drive new insights for labour market inclusion and restart the cycle of the PWD Inclusion Framework.

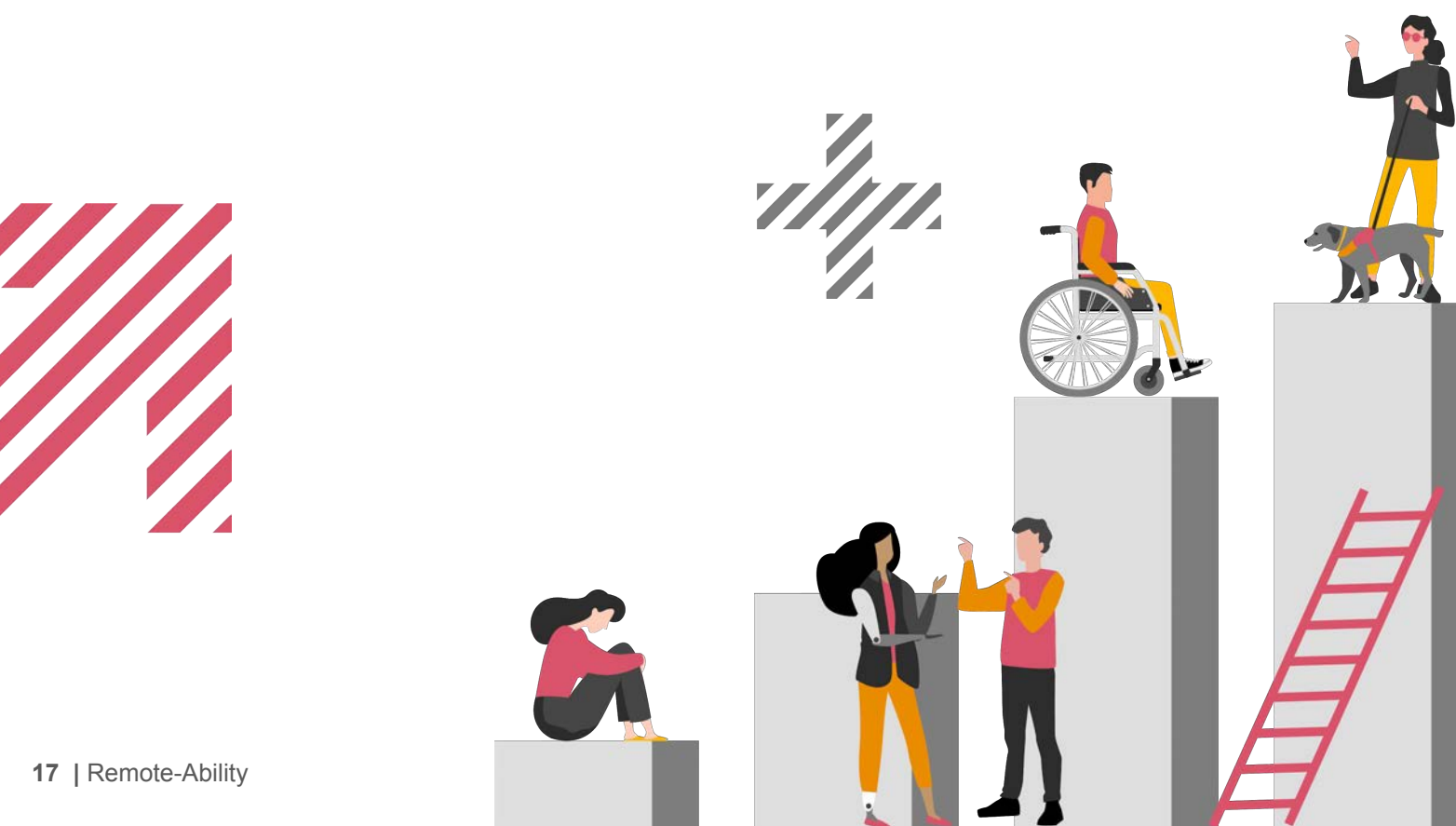
Together towards an inclusive future

As more people shift to working from home in the wake of COVID-19, their reliance on online platforms will increase. GCC governments can leverage this trend to raise awareness about the need to include PWD in the emerging remote economy and more generally, about their economic potential.

PWD rarely feel empowered in any society. It is imperative that governments and public and private-sector organisations address their marginalisation and build trust between PWD and wider society. One notable example is the UAE government's campaign, launched in 2016, to change perceptions of PWD by mandating that they should be referred to as "people with determination" rather than with disabilities. The UAE's hosting of the Special Olympics World Summer Games in 2019 provided an ideal platform to promote this perspective, with the government ensuring that the Games received widespread mainstream and social media coverage.

Within public and private-sector organisations, internal campaigns should aim to ensure that employees with disabilities feel empowered in the workplace and that their caregivers are applauded for the critical role they play. As part of these efforts, organisations should encourage employee resource groups (ERGs) for professionals with disabilities or disability caregivers so they can meet regularly to share their workplace experiences and challenges. A network leader should be assigned as a mediator between management and PWD employees, to ensure that insights derived from these sessions drive actionable change for the better. These ERGs should also be encouraged to organise company-wide awareness sessions, where PWD employees communicate their experiences – good and bad – with the general workforce and debunk common myths about their capabilities.

All these initiatives and the other actions proposed in this paper are bound together by a single, unifying idea. PWD are not only people with determination but also people with immense, untapped wealth-creating potential – for themselves, their families and their countries. As new ways of remote working are embedded across the region, it is both a moral and economic imperative to give PWD the employment opportunities they deserve.





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