The Future of HR

2019 Saudi Arabia HR Survey

May 2019

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Welcome to the first edition of the 2019 Saudi Arabia HR Survey. Our new ‘Future of HR’ survey focuses on leadership priorities, HR capabilities, analytics and impacts of technology.

It also provides insights to thought provoking queries such as ‘What will the HR function look like in 2030?’, ‘What are the top barriers faced by HR executives and leaders today?’ and ‘How will smart technologies such as Artificial Intelligence and Machine Learning impact jobs of the future?’

The report begins with the dynamic and evolving role and capabilities of today’s HR function, which is now seen as a more strategic function to an enterprise compared with the traditional HR function. It also provides a depiction of how technology is transforming the way HR operates, especially with triggers such as the Vision 2030 transformation programs. Saudi Arabia is planning to increase investments in technology and focus on digital transformation and the HR function will be impacted by this.

The report also describes multiple challenges and priorities reshaping the HR function and hence recognizing and embracing workforce shaping is crucial in creating the workforce of the future. Our survey findings and this report both indicate that ‘The Future of HR is Now’ and we thank all the respondents and HR executives who participated in the survey and contributed to this report.

Dr. Abdullah Al Fozan
Chairman,
KPMG in Saudi Arabia
Organizations in Saudi Arabia are facing significant challenges especially due to continuous changes in the external environmental factors. Technological, economical, demographical and legislative factors are affecting how organizations operate. In responding to the external challenges, business leaders are taking measures particularly related to workforce to adapt to change and minimize the negative effects on their organizations.

Business leaders need to acquire new skills in order to succeed. This is also applicable to HR executives who must hone their skills in strategic HR to lead their companies through these changes. As part of the Vision 2030 reforms announced in 2016, HR executives in Saudi Arabia are increasingly being pushed to take progressive steps to enable organizational changes and ensure greater business success. In line with this, more than half of the HR executives in Saudi Arabia recognize the need for the workforce to be transformed.

The convergence of artificial intelligence (AI), robotic process automation, machine learning and cognitive platforms is at the forefront of the Fourth Industrial Revolution, and organizations in every industry need to explore and understand the advancing integration of workforce and machines in the workplace. The HR function has an essential role to play and is required to acquire different skills and capabilities, while utilizing data analytics to help shape the workforce and deliver impactful workforce insights.

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**Introduction**

KPMG in Saudi Arabia would like to thank the following executives for their time and expertise in the preparation of this report.

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Digital Transformation Agenda

Challenges and Priorities Reshaping HR

The Future of HR is Now

How KPMG Can Help

About the Survey
HR in Saudi Arabia is evolving fast to keep up with the global trends and the local digital transformation that is taking place. The country’s educated and youthful workforce is leading this digital transformation journey while navigating through the impacts of globalization. Attracting, engaging, developing and retaining talent is reshaping the current HR position, role and expectation. The following infographics show the demographics of our country which heavily impacts the HR function.

86% of the country’s population is <50 age group, which means that there is a strong youthful workforce available now and in the future as well.

Saudi Arabia total population in 2018 was 33.4 million.

0-19 years: 31.5%
20-49 years: 54.5%
50 and above: 14.0%

Male population: 57.6%
Female population: 42.4%
‘Labor Market Bulletin’ results for Q3, 2018 showed that total number of employees reached 12,688,042 individuals, out of which the private sector employed 70 percent.

The illiteracy rate in the Kingdom was 60 percent in 1972, but in 2018, the illiteracy rate was less than 5.6 percent.

Saudi Arabia plans to eradicate illiteracy by 2024, as part of Vision 2030.

**Public**
- 1.5 million

**Private**
- 8.8 million

**Domestic workers**
- 2.4 million

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The youthful society, educated talent and a nation wide transformation have indeed influenced HR trends in KSA.

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**Note** - Youth (15-24 years) and Adult (15 years and above) literacy rate are the percentage of people who can, with understanding, read and write a short, simple statement on their everyday life.

**Sources** -
- https://knoema.com/atlas/Saudi-Arabia/topics/Education

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Most HR executives in Saudi Arabia —

63% agree that HR has initiated or recently completed a digital transformation.

But only 42% of HR executives have a digital workplan in place at the enterprise level or individual business units.

Majority of the HR executives in Saudi Arabia —

69% are confident in their ability to transform the workforce and itself, in line with global peers (76%).

However, it is also noteworthy that in Saudi Arabia 31% (vs. 24% globally) are less or not confident in transforming, which could lead to a struggle in the digital era.
HR executives in Saudi Arabia consider the following to be the key barriers to transcending the initial phases of digital transformation.

- Capability/skills: 60%
- IT organization: 60%
- Workplace culture: 33%

Globally, capability/skills (51%), capacity/resources (43%) and workplace culture (41%) are considered to be the top three barriers.

As per the strategic direction of the Management of organizations in Saudi Arabia, the primary challenges for the HR function to address are:

- Productivity: 46%
- Engagement: 42%
- Talent: 38%
Recent and projected technology investment has been highest for payroll systems.

HR capabilities which are perceived as most valuable to the organization as a whole and rated highest:

- **Learning and Reskilling**: 46%
- **Performance Management**: 42%
- **Employee Experience/Engagement and Retaining Employees**: 38%

Note - Payroll vendors include do-it-yourself payroll software and online options, large payroll-only vendors and companies who can manage all payroll and HR programs and systems.
Those leading the way on transformation recognize how AI and machine learning can drive significant value for HR but they are in the minority by far.

84% of HR functions have started to introduce AI and just 8% have invested in AI over the past 2 years.

Majority of the HR executives in Saudi Arabia —

79% agree that HR can provide value through predictive analytics

Moreover, 58% are using predictive analytics in HR and 54% in both Saudi Arabia and globally agree that their organization is effective in combining data to make workforce decisions.

In 2018 Saudi Arabia CEO Outlook Study, HR executives in this study believe the opposite;

63% believe AI will eliminate more jobs than it will create.
The HR function is increasingly being seen as more strategic to an enterprise by HR executives and also as a core value driver by the senior leadership. HR executives in Saudi Arabia perceive ‘Learning and reskilling’ and ‘Performance management’ as the HR capabilities to be of the highest value to their organization.
Performance management in the form that we know today went through several cycles of change, from a radical one as eliminating the performance management or having it as a fulltime job of an employee, to everything in-between. Performance management is an essential element that helps leaders keep track of progress towards specific goals along with the shortfalls that require intervention. Whether it is a short or long term, organizations should have their own way of measuring performance to help them navigate through the contemporary business environment. In the next year or two, performance management will be the top HR initiative with 50% of HR executives surveyed agreeing.

The perception of HR professionals, from administrator to HR executive, has gone through a major shift in recent years. As emerging and smart technologies are increasingly coming into play in today’s organizations, the role of the HR function is changing and is increasingly being recognized for its strategic potential.

HR executives in Saudi Arabia agree as nearly three quarters (71 percent) perceive their function’s role as becoming more strategic to their enterprise, in line with global findings (80 percent).

This can be supported by a recent example of a telecommunications company’s initiative in Saudi Arabia. In September 2018, it was reported that the company’s HR function led the transformation agenda of the company by ensuring that the HR strategy is aligned with the overall corporate strategy. The HR function also identified three strategic enablers for the transformation process: HR analytics, integrated technology and HR capability.

With the introduction of the Saudi Vision 2030, the HR community must take progressive steps in boosting organizational change. HR professionals need to lead their company’s leadership development programs. HR executives who have the ability to motivate, engage with and also empower their people shall play an important role in maximizing business value and impacting their company’s bottom line.

In line with this, HR executives in Saudi Arabia (71 percent) believe that their function is seen as a core value driver by senior leadership in the organization, similar to global counterparts (74 percent). When asked about their own perceived value, majority of the HR executives generally feel confident about the strategic value and performance of the HR function.

But how valuable is the HR function and the workforce/HR capabilities to CEOs and the businesses they serve? We see a positive trend in how HR is valued by CEOs. Data from KPMG’s 2018 Saudi Arabia CEO Outlook Survey shows that CEOs are increasingly viewing their workforce/HR capabilities as effective (44 percent agreed), especially in terms of workforce learning, talent management and leadership development.

This is further bolstered by the fact that HR executives perceive the following two HR capabilities to be of the highest value to the organization — ‘Learning and reskilling’, and ‘Performance management’ (Chart 1).

Chart 1: Perceived value of HR capabilities to the enterprise, top five Saudi Arabia vs Global (in %)

<table>
<thead>
<tr>
<th>Capability</th>
<th>Global</th>
<th>Saudi Arabia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning and reskilling</td>
<td>46.0%</td>
<td>45.8%</td>
</tr>
<tr>
<td>Performance management</td>
<td>46.2%</td>
<td>41.7%</td>
</tr>
<tr>
<td>Retaining employees</td>
<td>44.5%</td>
<td>37.5%</td>
</tr>
<tr>
<td>Employee experience and engagement</td>
<td>48.8%</td>
<td>37.5%</td>
</tr>
<tr>
<td>Attracting employees</td>
<td>47.2%</td>
<td>33.3%</td>
</tr>
</tbody>
</table>

Source: https://www.changeboard.com/article-details/16749/how-hris-leading-saudi-telecom-s-transformation-agenda/
HR executives in Saudi Arabia believe that technology transforms the way HR operates. Understanding the importance of technology, HR executives realize that the integration of human and digital labor has both opportunities as well as challenges. In line with Vision 2030 transformation programs, Saudi Arabia plans to increase investments in technology and digital transformation. Many organizations have planned to increase their HR technology spend as well.
Saudi Arabia launched the Digital Transformation Program as a key pillar of the Saudi Vision 2030, aiming at building a digital government, a digital economy with an industry based on the Fourth Industrial Revolution and a digital society. In line with this, HR executives in Saudi Arabia recognize a need to transform both the skills of their organizations’ workforce (94 percent) and how the HR function operates (94 percent).

In Saudi Arabia, a new platform to drive digital transformation was set up in December 2018. Saudi Aramco and the Saudi Information Technology Company set up a joint venture to provide training and employment to Saudi nationals and develop a platform to invest in high potential growth companies in the information, communication and technology (ICT) sectors.

**Having a digital plan in place**

The first steps in achieving digital transformation is to build an understanding of what needs to be transformed rather than being pressured into investing in new technology just for the sake of showing initiative. It is important to clearly know the exact areas that could potentially gain from digital capabilities and subsequently create a strategic roadmap of how this will be achieved.

The survey findings show that HR executives in Saudi Arabia and globally have not yet followed through with this thought process, as evident from the comparatively lesser number of survey respondents saying that they have a digital workplan in place. While approximately two-thirds (63 percent) of HR executives in Saudi Arabia (and globally) agree that HR has undergone or is currently undergoing a digital transformation, only 42 percent in Saudi Arabia (and 40 percent globally) have a digital workplan in place at the enterprise level or by business unit.

According to Abdullah A. Alaudah, “Five years ago, the HR function in government organizations was a traditional, non-strategic function focusing mainly on HR operations and employee relations. Today, after the Saudi Vision 2030 and NTP 2020, it has become mandatory to transform the HR function in government agencies in order to achieve the country’s strategic objectives such as becoming the 5th in e-Government and the 20th in government effectiveness. It is a strategic necessity to transform the HR from a traditional to a new-age business partner in order to create more efficient, performance-based learning organizations.”

**The integration of human and digital labor**

The advent of Artificial Intelligence, Robotics and Machine Learning led to HR executives having to focus upon understanding the emerging role of digital labor and planning on the best way to integrate human and digital labor in the workforce.

However, the impact of these emerging technologies on the workforce and jobs is still a topic of debate.

In order to achieve the strategic objectives, the HR is required to undergo transformation programs and introduce new functions, and abolish the conventional government-like working style. Today, the HR manages employee services, performance management, learning and development, talent management, leadership development and succession planning, talent acquisition, organization development, and corporate culture. This has enabled the HR to manage performance properly by identifying gaps in skills and thereby reskill, develop people, and prepare a strong pipeline of future leaders.

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1. Fourth Industrial Revolution is the fourth major industrial era since the initial Industrial Revolution of the 18th century. It consists of emerging technologies such as robotics, artificial intelligence, nanotechnology, quantum computing, biotechnology, the Internet of Things, the Industrial Internet of Things (IIoT), decentralized consensus, fifth-generation wireless technologies (5G), additive manufacturing or 3D printing and fully autonomous vehicles.

Human skill is more critical than ever – in the near term we are talking more about task replacement rather than jobs. Some jobs will be right in the cross hairs – call centers, drivers, clerical and administrative tasks. However most jobs will be enhanced and made safer and easier with cognitive technology and intelligent automation. The jobs of the future will revolve around innovation, software development and data sciences, design, curation, algorithms training, and cyber security.

As the pace of digital disruption is exponential, it will be harder for businesses to adapt without innovation as a core competency. Many routine, repetitive jobs will be candidates for automation, but as these technologies emerge, new innovations will follow. As risk is taken out of the physical and cognitive world, new innovations will emerge that were previously inconceivable.

About 63 percent of our HR survey respondents in Saudi Arabia (and 60 percent globally) believe jobs will decline in number. On the other hand, 84 percent of CEOs in Saudi Arabia (and 62 percent globally) expect AI and ML to drive up the number of jobs needing to be filled by humans. This contrast could potentially be due to CEOs thinking strategically that there would be a growing need of skilled staff in the future to help implement these emerging technologies; on the other hand, HR executives might be of the opinion that AI and ML shall eliminate low-skilled workers, especially those who execute routine and repetitive tasks.

But, embracing smart technologies in the HR function is something which is increasingly gaining attention and priority in Saudi Arabia. In December 2018, the second annual HR Tech Saudi Summit was held in Riyadh, which addressed key topics such as Artificial Intelligence in HR, digitization, employee wellbeing, digital disruption and the future of HR. It was supported by the Human Resources Development Fund of Saudi Arabia. The majority (79 percent) of HR executives in Saudi Arabia say that AI and ML can drive significant value for HR. However, it is yet to gain speed as only 25 percent of HR functions have started to introduce AI while only 8 percent invested in AI over the past two years.

According to Latifa Al Ghothami, HR Director at Saudi Industrial Development Fund (SIDF), “Understanding and designing the need (to achieve digital transformation) is crucial from leaders prior to implementation. Followed by enhancing awareness on the benefits of digitization, and providing all the support. Then enforce it.”

**HR technology investment**

Saudi Arabia plans to increase investments in technology and focus on digital transformation in the region, as per Vision 2030 reforms. Recent and projected technology investments in Saudi Arabia is highest for payroll systems, HR mobile apps and HCM (Human Capital Management) software. Almost two-thirds (63 percent) of respondents say that they have invested in Payroll system and/or vendor in the past 1–2 years for their enterprise, in terms of HR technologies and digital solutions. Additionally, future investments is also expected to favor payroll systems, with 79 percent expecting a significant or moderate level of investment, in line with global peers (Chart 2).

Additionally, survey results show that two-thirds (67 percent) have increased HR technology/digital solutions budgets in the past two years, and more than three-quarters (79 percent) plan to do so in the next two years.
Chart 2: Planned level of investment for HR technologies and digital solutions over next 1–2 years, top seven Saudi Arabia vs Global (in % investment)

- **Payroll system and/or vendor**
  - Global: 66.5%
  - Saudi Arabia: 79.2%

- **Enhanced Process Automation (EPA)**
  - Global: 52.5%
  - Saudi Arabia: 66.7%

- **HR mobile applications**
  - Global: 67%
  - Saudi Arabia: 62.5%

- **HR service management / case management**
  - Global: 62.9%
  - Saudi Arabia: 62.5%

- **Predictive analytics**
  - Global: 60.4%
  - Saudi Arabia: 62.5%

- **Cloud HCM**
  - Global: 60.1%
  - Saudi Arabia: 50%

- **On premise HCM**
  - Global: 51.1%
  - Saudi Arabia: 50%
Employee productivity, engagement and culture are few common challenges faced by the HR function in Saudi Arabia. Improving employee engagement, enhancing employee experience and shaping a positive work culture are paramount to an organization’s success. Hence, decisive action by the HR executives of today (in close collaboration with the C-suite) shall redefine a task-oriented workforce into a strongly connected, innovative and futuristic workforce.
HR functions across the world face multiple challenges which they need to address to make their systems more efficient. One of the largest issues faced by HR is productivity. HR executives need to figure out how to improve organization and workforce productivity. It leads to employees covering more ground in lesser amount of time, and maximizing their overall efficiency at work. Often, it has been reported that inefficient or outdated practices account for the majority of wasted time on the job.

HR executives in Saudi Arabia say that productivity (46 percent) followed by employee engagement (42 percent) are the primary issues they need to address, as per the strategic direction of their management.

However, it is also noteworthy that enablers (such as analytics and employee experience) for improving productivity and engagement are low on the list of HR initiatives. Employee experience, on its own, ranks lower among HR initiatives (25 percent), perhaps in part due to employee experience being a lower priority item (17 percent) for the management. Moreover, only 8 percent cite analytics as a top management issue, and 8 percent believe analytics will be a primary HR initiative over the next year or two.

Turning to workplace culture, as we noted earlier in our key findings, HR executives consider it to be a top barrier to digital transformation with 42 percent in Saudi Arabia (35 percent globally) calling their current culture still more ‘task oriented’ than innovative or experimental. Other cultural attributes that HR respondents view as best describing their enterprise are ‘metric-driven’ (46 percent) and ‘long-term focused’ (42 percent).

A major part of engagement is successfully creating a company culture in which people develop a sense of belonging and feel supported. Improving employee engagement, enhancing employee experience and shaping a positive enterprise culture and mindset should be top priorities for the HR function today.

If people are disengaged, it is most likely they are not at their most productive because they don’t feel attached to the company. On the other hand, when people feel strongly connected to a company, they are more motivated and therefore more naturally inclined to be productive, contributing to their organization’s success.

It is therefore very important to obtain deeper understanding of employee skills, strengths, goals and purpose, while creating customized employee experiences and figuring out the perfect workplace culture that helps people and organizations thrive together. Keeping this in mind, our survey results indicate that HR executives believe senior leadership is starting to place more value on technologies that improve the employee experience (42 percent) vs. those that strictly save money (25 percent).

Culture is a huge barrier. To address and promote cultural changes top management should agree on a philosophy and align their behavior to it to ensure a culture supporting the business with consistency.

Latifa Al Ghothami
HR Director, Saudi Industrial Development Fund-SIDF

Creating an employee experience that differentiates employers and helps in attracting and retaining talent is very critical to organizations. We are living in a very competitive world, where companies are capitalizing on delivering the best services and products to their customers. In most sectors, to be a market leader means that you’ve got to have the best talent amongst your competitors. The digital revolution is changing employee profiles and needs. Moreover, with all the transformation that is happening in Saudi Arabia today, organizations need to focus on attracting local talent, nurturing them, and providing an attractive experience especially with more women joining the workplace. Therefore, I expect that HR leaders shall be focusing more on improving employees’ experience as one the main factors contributing in the overall success of their organizations.

Ghassan Qudah
Senior Director, Advisory, KPMG in Saudi Arabia
HR executives of tomorrow must focus intently on recognizing and embracing workforce shaping (with tools such as data and analytics) as critical to success in creating and sustaining the workforce of the future.

"Artificial Intelligence represents major changes in business models, security, infrastructure and management – the ability to train algorithms and improve the working relationships between human and machine. As more transparency is achieved through AI and data analytics, more problems will be identified, and people will need to lead the charge to make the changes and train the systems to help people solve the business issues. This will continue to drive risk out of the system. These technologies will also be available to people who wish to do harm so cyber security will be paramount.

Humans have a critical role to play in the digital era – while robots may handle the mundane, unskilled and dangerous work we will be freed up to do more meaningful and valuable thinking, including inventing, evolving and managing new innovations. No matter what computers achieve many human traits cannot be replicated by technology. Intelligent automation has the promise to lead to breakthroughs we haven’t been able to achieve with solely human inputs – i.e. cancer diagnosis and treatment – in this case AI isn’t taking human jobs; it’s saving human lives.”

Dr. Samer Abdallah
Head of Digital, KPMG in Saudi Arabia
Data and analytics in HR will allow businesses in Saudi Arabia to optimize HR operations, strategic planning, decision making and performance tracking. HR executives will experience that exploiting the capabilities of data and analytics tools for informed decision making and predictive insights will soon become indispensable. In line with this, majority of the HR executives in Saudi Arabia (79 percent) agree that HR can provide value through predictive analytics. Moreover, 58 percent say they are currently using predictive analytics in HR and 54 percent in both Saudi Arabia and globally agree that their organization is effective in combining data to make workforce decisions.

However, as mentioned earlier, actual investment and focus in analytics is lower than in most other areas, with only 8 percent citing it as a top HR initiative. This discrepancy aligns with global findings, perhaps suggesting that HR might be interpreting the term ‘analytics’ to mean ‘reporting’.

It is however clear that HR transformation leaders of tomorrow must make the best use of data and analytics to improve the value of HR function to the business and also boost their organization overall competitiveness in the race for the best and brightest talent.

A global shift towards digital HR is unwavering and the time to invest in HR technology is now. One of the quickest and most effective methods to boost a company’s profits is to invest in the best HR technology and software. Investing in HR systems, has been utilized in recent years, as a quick win to optimize HR operations and also to derive key benefits such as improving the HR function’s efficiency and overall business effectiveness. Additionally, with the age of smartphones and their evolution, employees are heavily reliant on accessing HR applications using their mobile phones. Hence, nowadays, business leaders are repositioning their HR as a strategic arm in deriving value to the business by gaining direct access to dynamic dashboards and intelligence reports about their talent.

It is evident that there will be a gap between HR executives who confidently ride this wave of digital transformation and those making limited strides. There is a possibility that in a few years, technology could disrupt them out of existence, while the largely inactive face a much shorter timeline to extinction.

Our advice to HR executives in Saudi Arabia is to focus carefully on:
— Exploiting the significant value and competitive advantage of data and analytics
— Creating a new mindset that recognizes continuous change in the digital era
— Improving employee engagement, enhancing employee experience and shaping a positive work culture
— Preparing for Artificial Intelligence and Machine Learning and their integration into a collaborative future workforce that combines human and digital labor
— Valuing employees as ‘customers’ in the increasingly digital, global and agile world of work

It is clear that HR teams leading the way — and, by extension, the organizations in which they work — recognize that the ‘Future of HR is Now’.

Khalil Al Sedais
Office Managing Partner, Riyadh, KPMG in Saudi Arabia
During 2018, senior HR executives from Saudi Arabia participated in the Future of HR Survey, with representation from nine industries. Approximately one-third of the sample are companies with a headcount of 5,000 or more employees and 36 percent of participants are from organizations with revenue of $1 billion. This year’s survey offers insights about the future of the HR function against a backdrop of digital disruption.

**Industry**

- **Hospitality & Entertainment**: 4%
- **Government/Public Sector**: 13%
- **Transport & Logistics**: 8%
- **Health Care**: 4%
- **Energy**: 4%
- **Infrastructure**: 8%
- **Financial Services**: 17%
- **Consumer Goods**: 25%
- **Manufacturing**: 17%

**Respondent Industry**

% of Saudi Arabia Respondents
Company Footprint

Revenue* (in USD)
% of Saudi Arabia Respondents (excluding Education/Non-Profit industries), n=22

- 36% $1 billion or more
- 27% $500M - $999M
- 36% Less than $500 million

Enterprise Headcount
% of Saudi Arabia Respondents, n=24

- 33% 5,000 or more
- 54% 500 to 4,999
- 13% Less than 500

Human Resource Headcount
% of Saudi Arabia Respondents, n=24

- 29% 100 or more
- 25% 40 to 99
- 38% Less than 40

*Not collected for education/non-profit industries
Every market leader understands that talent unlocks competitive advantage. But workforces and workplaces are changing — along with employer-employee relationships. You may need to invest in disruptive technology, acquire critical new skills, introduce Artificial Intelligence, or reshape your employee experience and workplace culture. It’s all about driving your business forward in new ways. At KPMG Saudi Arabia, our People and Change practice understand these challenges and opportunities and are working shoulder-to-shoulder with businesses like yours every day. We are delivering the experience, research and industry expertise that organizations currently need to define the Future of HR. It’s a digital world but people still make it turn. They will remain your most-important investment, your greatest asset and the secret sauce in your brand.

For more information, we encourage you to contact any of the contributors listed in the publication or your local KPMG office.
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