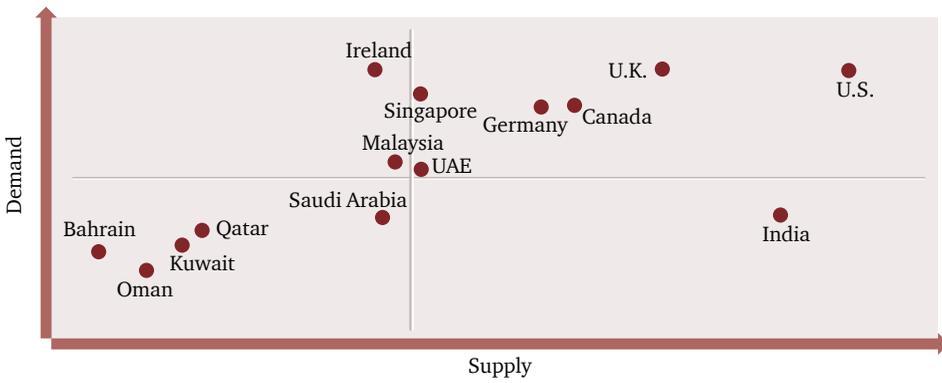# strategy&
Formerly Booz & Company

Linked in®

The dynamics of the digital job market in the GCC

GCC countries' digital job markets are underdeveloped compared to international benchmarks
(March 2017)

Demand / Supply scatter plot with: Ireland, U.K., U.S., Singapore, Germany, Canada, Malaysia, UAE, Saudi Arabia, India, Bahrain, Qatar, Kuwait, Oman

> **Modernizing the digital job market could create *1.3 million* additional digital jobs in the GCC by 2025**

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GCC digital professionals lack the skills that recruiters are seeking

Top available skills of GCC digital professionals	Digital skills most in demand across sectors
1 Management	1 Statistical analysis and data mining
2 Team management	2 Algorithm design
3 Project management	3 Web architecture and development framework
4 Microsoft Office	4 SEO/SEM marketing
5 Team leadership	5 Middleware and integration of software

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The skills gap is the result of supply and demand challenges facing the digital job market

Supply challenges

01 Limited academic preparation for digital skills

Outdated ICT education system contributes to the low number of digital graduates from the GCC

University graduates (2017)

7% of GCC digital professionals studied locally vs. **64%** in the U.S. and **37%** in the U.K.

02 Inadequate professional development environment

Employers do not offer adequate internships or training programs

Professional development offerings (2015)

29% of Saudi employers offer apprenticeships or internships to make up for the skill shortage

34% of organizations in Saudi Arabia have a formal ICT training program

03 Limited interest in pursuing digital careers

Nationals prefer business and economics majors

UAE university graduates (2013)

8,700 — Business /economics
2,000 — IT

Other subjects

Demand challenges

01 Low digitization across sectors

Limited adoption of emerging digital technologies

Corporate digitization survey (2016)

23% of companies understand digitization as a business transformation

37% of companies have a digital strategy

02 Weak digital industry

The GCC remains largely a technology consumer

Digital industry primarily engaged in sales and services rather than product development, innovation, and R&D

03 Underdeveloped entrepreneurial ecosystem

The startup ecosystem does not promote entrepreneurship and innovation

SMEs that have implemented some level of innovation (2014)

Below 10% — GCC average
23% — EU

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To boost their digital job market, GCC governments should launch initiatives that increase the supply of advanced digital skills, and create demand for high-value digital jobs.

Boost supply			Developed digital job market	Create demand		
1 Build digital capabilities within academia	**2** Prepare digital professionals for digitization	**3** Increase interest in digital-related fields		**1** Increase digitization across sectors	**2** Develop the digital industry	**3** Boost digital entrepreneurship

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Source: Strategy& together with LinkedIn; PwC

Strategy& is part of the PwC network   www.strategyand.pwc.com/me