The Working Future: A Focus On The GCC

It’s Time To Change How We Think About Work
The World Government Summit is a global platform dedicated to shaping the future of governments worldwide. Each year, the Summit sets the agenda for the next generation of governments with a focus on how they can harness innovation and technology to solve universal challenges facing humanity.

The World Government Summit is a knowledge exchange center at the intersection of government, futurism, technology, and innovation. It functions as a thought leadership platform and networking hub for policymakers, experts and pioneers in human development.

The Summit is a gateway to the future as it functions as the stage for analysis of future trends, concerns, and opportunities facing humanity. It is also an arena to showcase innovations, best practice, and smart solutions to inspire creativity to tackle these future challenges.
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As part of a broader global research program over the past year, we have studied the motivations and priorities of workers across 19 countries, including Saudi Arabia and UAE, and have considered how firms and governments in the GCC can get ahead in the shifting war for talent.

The pandemic has undoubtedly triggered lasting changes when it comes to work. Many workers were part of a forced experiment in remote working that shifted perceptions about such arrangements. Others found themselves in jobs that required them to personally confront the virus daily just to keep society running.
All of us had cause to reflect on what we want our work to look like and what role we want it to play in our lives. According to a Bain & Company survey conducted by Dynata, 58% of workers across ten major economies feel the pandemic has forced them to rethink the balance between work and their personal lives. In the Gulf Cooperation Council (GCC) countries, this figure rises to around two in three workers based on results from Saudi Arabia and the United Arab Emirates (UAE).

But profound changes were starting to surface even before the pandemic. Concerns about the impact of automation have surged as machine learning and related technologies have matured. The growth of gig work, supported by new digital platforms, has thrown the longevity of the traditional employment model into question. Flexible work arrangements have moved into the mainstream. Demands for firms to define a clear social purpose have prompted business leaders to embark on soul-searching journeys.

This pattern holds true for the GCC, where there are strong concerns that automation could lead to job losses and an appetite for home, rather than office, working. For governments this poses some big policy questions, especially on how to attract and retain talent in a region where many workers come from outside of the region—up to 90% in the UAE.
The relationship between workers and firms is changing radically, forcing leaders to rethink their approach to talent.

In prior research, we have explored the dawn of a new era of business,¹ one in which outrunning extinction demands not just scale, but also speed and customer intimacy. We call those who achieve this balance ‘scale insurgents’.²

Yet our understanding of workers—their hopes and desires, their untapped potential, their emotional needs—is often superficial.

The pandemic has also brought one reality into stark relief: The war for talent is not just about cultivating a pipeline of future company executives. Surging attrition rates suggest that many workers are using the pandemic-induced job disruption as an opportunity to reevaluate what they want from their work. As a result, many companies are struggling to fill shortages in key frontline roles, threatening their ability to return to full capacity when the crisis subsides. This could become a big issue in the GCC, where for instance, more than 76% of UAE employees have either changed jobs in 2022 or are planning to do so in the next 12 months, according to a new survey by Zurich Workplace Solutions and market research company YouGov.³

As part of a broader global research program over the past year, we have studied the motivations and priorities of workers across 19 countries, including Saudi Arabia and UAE, and have considered how firms and governments in the GCC can get ahead in the shifting war for talent.

¹ https://www.bain.com/insights/firm-of-the-future/
² https://www.bain.com/insights/becoming-a-scale-insurgent/
We’ve identified five key themes that are reshaping work, in the GCC and globally:

1. **Motivations For Work Are Changing.** Gains in living standards over the past 150 years are allowing us to spend less of our time working but are raising expectations about what a job should provide.

2. **Beliefs About What Makes A ‘Good Job’ Are Diverging.** As attitudes toward work fragment, the average worker is no longer a useful approximation. We’ve identified six worker archetypes, each with a different set of priorities.

3. **Automation Is Helping To Rehumanize Work.** Distinctly human advantages—around problem solving, interpersonal connection, and creativity—are growing in importance as automation eliminates routine work.

4. **Technological Change Is Blurring The Boundaries Of The Firm.** Remote and gig work are on the rise, but they are challenging firm cohesion.

5. **Younger Generations Are Increasingly Overwhelmed.** Young people, especially in advanced economies, are under mounting psychological strain that spills over into their work lives.

Policymakers in the GCC must react to the changing nature of work and worker demands. Countries such as Saudi Arabia and the UAE have launched successful programs to attract international companies and expertise. Now they must look to create the conditions to make skilled workers stay in the country, offering more flexible visa regimes for foreign workers and allowing them to combine remote with office working more easily. In addition, policymakers have the opportunity to create tailored policies to attract a new wave of talent across the different archetypes defined by having policies that target the value proposition that each seek.

This also has implications on the education and training system which must now adapt their offerings to provide highly flexible programs and focus on developing the transferable skills of upcoming local talent. This can help to create a highly skilled local workforce that can drive the economy forward supported by expertise from all around the world.
Chapter 1

Motivations For Work Are Changing

It’s perhaps unsurprising that Nikola Tesla and John Maynard Keynes foresaw a gradual disappearance of work considering the developments they witnessed in their lifetimes. Between 1870 and 1930, the average weekly hours of nonagricultural workers in the major industrial economies fell by a quarter (see Figure 1.1).

At the onset of the Industrial Revolution, the working week was as long as physically bearable. Survival was the primary motive for work for all but a fortunate few. That all began to change as industrialization hiked living standards. By the early 20th century, working hours were falling, allowing more workers to spend their time as they chose.
As growth decelerated in the West in the latter part of the last century, this trend began to taper, although it persists today. The same trend is evident in the GCC. In Saudi Arabia, for example, average working hours in manufacturing have fallen from 54 hours per week in 2008 to 47 in 2020, according to CEIC.4

The importance placed on our jobs compared with other life factors has also fallen. According to the World Values Survey, younger generations place a lower importance on work relative to leisure time compared with respondents in older generations who completed the survey at the same age (see Figure 1.2). The only outlier is Generation X (people born between the mid-1960s and the early-1980s)—who were hit particularly hard by the 2007–09 financial crisis in terms of wealth and career prospects. We found a similar pattern in the importance of work compared with family.

![Figure 1.1: Rising Prosperity Has Reduced The Time That People Need To Spend Working](image)

**Average Hours Worked Weekly**

![Figure 1.2: The Importance Placed On Work Relative To Leisure Has Declined Across Generations](image)

**Subjective Importance Of Work Relative To Leisure For US Workers, By Respondent Age At Time Of Survey**

Notes: Weekly hours are averaged over the year, including vacations; excludes agricultural workers prior to 1960
Sources: Huberman & Minns, 2007; Penn World Tables; Bain analysis

This trend is not confined to the West. In general, as countries grow their GDP, workers gain greater economic freedom to spend time on other pursuits—something certainly true in most GCC countries. (see Figure 1.3).

As workers have become richer, they have recognized that a job can serve more than their basic economic needs. Globally, the richer a country, the lower the share of the population that believe a job is “just a way of earning money,” although money remains the most important individual thing for workers in the GCC and globally. (see Figure 1.4).

However, like workers elsewhere in the world, compensation is a top priority for GCC workers. Globally, our survey found that 22% of workers rank compensation as the thing that matters most to them in a job (see Figure 1.5), higher than all other job attributes, including interesting work at 15% and an inspiring company at 5%. It also ranks in the top three factors for 56% of respondents.

**Figure 1.3:** Hours Worked Tend To Decline As Countries Become Richer

**Average Hours Worked Weekly, 2017**

![Graph showing the relationship between GDP per capita and average hours worked weekly, 2017.](image)

Notes: Logarithmic scale; weekly work hours are for the entire labor force, including full time, part time, contract workers, etc.
Sources: World Bank; National accounts data

**Figure 1.4:** As Incomes Rise, Our Reasons For Working Extend Beyond Money

**Workers Who Say A Job Is “Just A Way of Earning Money,” 2015**

![Graph showing the percentage of workers who say a job is “just a way of earning money” by GDP per capita, 2015.](image)

Sources: ISSP; World Bank; Bain analysis
Interesting work and inspiring companies rank much lower in the GCC than globally, meaning companies must motivate talent differently in the region. And GCC workers are more likely to be motivated by jobs with better pay or job security than people elsewhere in the world. (see Figure 1.6)

**Figure 1.5:** While Workers Rank Compensation First Over Any Other Job Attribute, It’s The Top Priority For Just 1 In 5 Workers

**Workers Who Rank Each Job Attribute As A Top Priority**

![Bar chart showing job attributes ranked as top priorities](chart1)

Note: Includes US, Germany, France, Italy, Japan, Brazil, China, India, Indonesia, and Nigeria
Source: Bain/Dynata Worker Survey (n=20,000)

However, GCC companies and governments must also bear in mind that, in rich countries, several social changes have likely broadened workers’ expectations around the needs a job should fulfill. A shift in the nature of social class, which is now primarily reflected in one’s occupation, has probably played a role in this change. Looking at the US, there’s been an inversion of the relationship between income and hours worked over the past century (see Figure 1.7). The upper echelons work the longest hours of all. Busyness is now a sign of status and importance. Those at the bottom of the income hierarchy work the least hours, as they are often unable to secure the stable full-time employment they desire.

**Figure 1.6:** GCC Workers Motivated By Better Pay And Security

**Proportion Of Respondents Ranking Attribute As Their Top Priority / Top Three Priority- Middle East (UAE + Saudi Arabia)**

![Bar chart showing job attributes ranked as top priorities](chart2)

Note: Middle East consists of UAE and Saudi Arabia
Source: Bain Worker Survey (n=3k)
GCC governments have recognized that people these days want more from life and work. In some cases, they have tried to respond to workers’ demands for more leisure time. In December 2021, for example, the UAE aligned its weekend to follow countries globally and extended the weekend to create a 4.5-day week for state employees, which it said was the shortest working week of any country globally. This also helped to bridge the gap over weekend days with international partners, most of who took Saturday and Sunday off.

In addition, the subjective importance that we place on our jobs compared with other life factors has declined across successive generations. In the GCC, women value flexibility slightly more than men, although both think it is important. Our survey also found that people increasingly value pay and job security as they grow older, with younger people placing more emphasis on learning and flexibility at work (while still mostly concerned about pay).

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**Figure 1.7: The Relationship Between Income And Number Of Working Hours Has Flipped Over The Last Century**

*Usual Weekly Hours Of US Workers, By Income Decile*

<table>
<thead>
<tr>
<th>Year</th>
<th>Bottom decile</th>
<th>3rd</th>
<th>Median</th>
<th>8th</th>
<th>Top decile</th>
</tr>
</thead>
<tbody>
<tr>
<td>1800–1900</td>
<td>65.4</td>
<td>62.7</td>
<td>60.6</td>
<td>60.0</td>
<td>53.1</td>
</tr>
<tr>
<td>1973</td>
<td>41.2</td>
<td>40.1</td>
<td>40.3</td>
<td>40.6</td>
<td>39.7</td>
</tr>
<tr>
<td>2018</td>
<td>34.4</td>
<td>39.3</td>
<td>40.1</td>
<td>40.7</td>
<td>42.0</td>
</tr>
</tbody>
</table>

Notes: Excludes vacation weeks, breaks, and overtime; weekly hours for 1800–1900 are based on a collection of surveys from the period. Sources: CPS Annual Social and Economic Supplements; The Wage and the Length of the Work Day: From the 1890s to 1991 (Costa, 2000)

**Figure 1.8: Good Compensation And Interesting Work Become More Important As Workers Age**

*Percentage Of Middle East Workers Who Rank The Job Attribute In Top 3 Priorities*

In addition, the subjective importance that we place on our jobs compared with other life factors has declined across successive generations. In the GCC, women value flexibility slightly more than men, although both think it is important. Our survey also found that people increasingly value pay and job security as they grow older, with younger people placing more emphasis on learning and flexibility at work (while still mostly concerned about pay).

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However, while people, especially in richer countries, place increasing emphasis on leisure time this does not mean there is any less appetite for work. In 2017, only 28% of Americans said they would stop working altogether if they had enough money for the rest of their lives—down from 34% in 1995.

All of this poses particular challenges in the GCC, where a high proportion of workers come from abroad.

Some will work to send money home, which may contribute to the high importance of compensation. But increasing numbers of professionals are looking to make a career and home in the region. Job security—the ability to commit to a country and a company—is ranked as the second most important priority for workers in the region, followed by learning and flexible, good hours. More than two-thirds of the region’s workers in permanent employment say they are satisfied with their jobs, compared to little more than half of contingent workers—a gap that widens among the middle classes. The GCC must find ways to keep and develop its workers.

“Younger generations place a lower importance on work relative to leisure time compared with respondents in older generations”

Figure 1.9: Flexibility And Compensation Are Slightly More Important To Women In The GCC

Note: Results are variance normalized. Middle East consists of UAE and Saudi Arabia
Source: Bain Worker Survey (n=3k)
Beliefs About What Makes A ‘Good Job’ Are Diverging

Personalities composition can vary according to a country’s level of social and economic development. In less advanced countries, researchers have found that personality traits tend to be fairly homogeneous. However, as anthropologist Joseph Henrich has shown, the emergence of the modern economy, with its specialized divisions of labor, has caused individuals to grow into increasingly distinctive social niches over time.
As personalities have fragmented, so have attitudes toward work.

To explore these differences, we constructed a 10-dimension framework of attitudes, building off the existing literature in motivational theory and psychology.

The Ten Dimensions Are:

**Work Centricity:** How much of my identity and sense of meaning comes from work?

**Financial Orientation:** How much does my level of income impact my happiness?

**Future Orientation:** Do I prioritize investing in a better future or do I focus on living for today?

**Status Orientation:** How concerned am I about being perceived by others as successful?

**Risk Tolerance:** Am I willing to take risks to improve my life if I might end up worse off?

**Variety:** Do I prefer change or predictability?

**Autonomy:** How much do I value being in control of my own work?

**Camaraderie:** Do I see work as primarily an individual or a team effort?

**Mastery:** How much satisfaction do I find in the process of perfecting my craft?

**Self-Transcendence:** How important is it to me to make a positive difference in society?
We found significant variation in scores on all ten dimensions in all of countries covered in our research. Thinking about what the average worker wants from a job no longer makes sense.

We’ve identified six archetypes around which workers tend to converge.

1. Operators
Find Meaning And Self-Worth Primarily Outside Of Their Jobs
They see work as a means to an end. They are not particularly motivated by status or autonomy, and generally do not seek to stand out in their workplace. They tend to prefer stability and predictability. Thus, they have less interest in investing to change their future compared with other archetypes. At the same time, Operators are one of the more team-minded archetypes, and often see many of their colleagues as friends. At their best, they are the team players that form the backbone of the organization. At their worst, they are disengaged and lack proactivity.

2. Givers
Find Meaning In Work That Directly Improves The Lives Of Others
They are the archetype least motivated by money. They often gravitate toward caring professions such as medicine or teaching but can also thrive in other lines of work where they can directly interact with and help others. Their empathetic nature typically translates into a strong team spirit and deep personal relationships at work. At the same time, their more cautious nature means they tend to be forward planners, who are relatively hesitant to jump on new opportunities as they arise. At their best, they are selfless, helping to build the trust every organization needs to function. At their worst, they may be impractical or naive.

3. Artisans
Seek Out Work That Fascinates Or Inspires Them
They are motivated by the pursuit of mastery. They enjoy being valued for their expertise, although they are less concerned with status in the broader sense. Artisans typically desire a high degree of autonomy to practice their craft and place the least importance on camaraderie of all the archetypes. While many find a higher purpose in work, this is more about passion than altruism. At their best, they are able to solve even the most complex of challenges. At their worst, they can be aloof and lose sight of bigger objectives.

4. Explorers
Value Freedom And Experiences
They tend to live in the present and seek out careers that provide a high degree of variety and excitement. Explorers place a higher-than-average importance on autonomy. They are also more willing than others to trade security for flexibility. They typically do not rely on their job for a sense of identity, often exploring multiple occupations during their lifetime. Explorers tend to adopt a pragmatic approach to professional development, obtaining only the level of expertise needed. At their best, they will enthusiastically throw themselves at whatever task is required of them. At their worst, they are directionless and lack conviction.
5. **Strivers**

**Have A Strong Desire To Make Something Of Themselves**

They are motivated by professional success, and value status and compensation. They are forward planners who can be relatively risk averse, as they opt for well-trodden paths to success. Strivers are willing to tolerate less variety so long as it is in service of their longer-term goals. They tend to define success in relative terms, and thus can be more competitive and transactional in their relationships than most other archetypes. At their best, they are disciplined and transparent. At their worst, their competitiveness degrades trust and camaraderie within the organization.

None of these archetypes is better or worse than the others. While a company full of Operators might lack the dynamism needed to compete in the modern economy, a company full of Strivers or Pioneers would collapse under the weight of conflicting egos. Instead, each archetype brings its own contribution to a firm.

We can see the attitudes of each archetype in workers’ rankings of different job attributes. Workers across all archetypes still rank compensation as their top attribute most frequently. But beyond pay, the story becomes more nuanced. Operators’ and Strivers’ lower risk tolerance means they value job security. For Operators and Givers, a stronger desire for camaraderie translates into more emphasis on good relationships with coworkers. Artisans place a relatively high importance on interesting work.

6. **Pioneers**

**Are On A Mission To Change The World**

They form strong views on the way things should be and seek out the control necessary to achieve that vision. They are the most risk-tolerant and future-oriented of all the archetypes. Pioneers identify profoundly with their work. Their vision matters more than anything, and they are willing to make great personal sacrifices accordingly. Their work relationships tend to be more transactional in nature. Their vision is often at least partly altruistic, but it is distinctly their own. At their best, they mobilize their infectious energy to bring about lasting change. At their worst, they are uncompromising and imperious.

These archetypes help us better understand what it takes for different individuals to find a sense of purpose at work. For some archetypes, such as Pioneers and Givers, working in organizations with a clear social mission is often important. Strivers are more likely to find a sense of purpose in achievement, while Artisans may find it in mastery. For Explorers, it is likely to come from breadth of experience. Operators are more likely to find purpose outside of their work lives.
In the GCC, there are more Pioneers and Givers, and fewer Artisans, than in other developed countries. This reflects a young population and a large proportion of foreign workers—in the UAE, the average age is just 30 and close to 90% of workers are foreign, for example. Pioneers want to change things, will take risks, and look to the future. Givers want to help others and find meaning in their work. It’s a good foundation for a highly skilled population of professionals.

The GCC reflects trends also found in countries such as India and Nigeria, whose younger populations likely skew them toward risk-tolerant archetypes, like Pioneers and Explorers.

The archetype mix also differs across occupation types. Manual workers, in occupations such as manufacturing and construction, are overall most likely to be Operators and Givers. Administrative workers, in clerical and secretarial jobs, are the most likely to be Operators and least likely to be Pioneers. Strivers and Pioneers are drawn to knowledge roles, in management, professional services, and technical occupations.

For the last group, it’s worth noting that business leaders’ attitudes toward work differ from the wider population. For instance, 25% of US executives are Pioneers, compared with 9% of the nation’s working population. In the GCC, a higher proportion of people in service and knowledge jobs are Pioneers and Givers than in other business areas.
Chapter 3

Automation Is Helping To Rehumanize Work

Over the past century, fears of mass joblessness from automation have come and gone in waves.

During World War II, mass labor shortages led to significant advances in the mechanization of production. Then in the 1980s, the burgeoning field of artificial intelligence, combined with the growth of the personal computer, led to a second wave of fears around job-killing machines. Today, workers in the GCC and globally think there is a good chance their jobs could be replaced by technology.

More recently, a series of breakthrough advances in the field of machine learning, alongside new imagination-capturing services such as Amazon’s Alexa and Apple’s Siri, have triggered a fresh upswelling of concern. As businesses ratchet up their ambitions for automation in light of the pandemic, \(^6\) these concerns are likely to continue growing.

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\(^6\) https://www.bain.com/insights/intelligent-automation-getting-employees-embrace-bots
Over the past 150 years, technology has interacted with parallel structural forces such as globalization, shifting consumer tastes, and demographic changes, to continuously redefine the mix of work.

**Figure 3.1:** Many GCC Workers Believe Their Job May Be Automated, But Feel Able To Cope With The Job Loss From Automation

Proportion Of Respondents Who Believe Their Job Could be Automated In The Next 5–10 Years, By Country (%)

Proportion Of Respondents Who They Would be Able To Cope With Job Loss From Automation, By Country (%)

Source: Bain Worker Survey (n=38k)
Looking ahead, it would be a gross oversimplification to imagine that the next generation of jobs will all be software engineers and data scientists.

Over the next decade, a complex interplay between automation and other forces will once again dictate the pattern of rising and falling occupations. An aging population will increase the need for healthcare workers. The continued shift of domestic work into the formal economy will boost the demand for hospitality and various personal services. And the pivot to e-commerce will decrease the need for sales workers while increasing the need for transportation workers. At the same time, the automation of routine tasks will accelerate the decline of sales jobs, while keeping job growth in transportation and hospitality at lower levels than we would have experienced otherwise. Concurrently, the automation of manufacturing and administrative jobs will hasten the decline set off by globalization in recent decades.

These patterns are emerging across advanced economies, including the GCC, with the same underlying forces at play. More than half of workers in the GCC are worried they could lose their job to automation, a markedly higher proportion than in the US or Europe, although fewer than in China or Nigeria. Close to three quarters of workers in the UAE and Saudi Arabia think they could cope if their jobs were automated, however.
To understand how this shifting occupational mix will affect the capabilities required by future workers, we classified more than 2,000 underlying activities across occupations into five categories.

**Physical** — work that involves directly manipulating the physical environment, such as operating machinery or preparing food.

**Information Processing** — work that centers on gathering and structuring information, such as compiling data or maintaining records.

**Problem Solving** — work that entails framing issues, assessing options, and exercising judgment, such as prescribing treatments or improving business processes.

**Creative** — work that centers on imagining new possibilities and forming original ideas, such as designing products or developing a business strategy.

**Interpersonal** — work that involves interacting with others to understand their needs and achieve shared objectives, such as teaching or negotiating.
While the boundaries between these activities can sometimes be blurry, the distinctions are helpful in characterizing the shifting nature of work. The more repetitive nature of most physical and information processing activities makes them prime candidates for automation. Problem solving, creative, and interpersonal activities are more variable in nature and more reliant on higher human faculties. Workers will increasingly be able to enhance their performance in these domains with AI-powered virtual assistants. But few experts believe such technologies will progress at a fast enough pace to render human involvement obsolete anytime soon.

In the long run, we see at least one positive headline emerging from automation: The days of menial jobs that leave us feeling less like humans and more like placeholders for machines may soon be behind us.

“Empathy, introspection, and behavioral adaptation will be increasingly critical in the jobs of the future. And today’s low-skill workers will have significant value to bring to the table in this respect”

**Figure 3.2: The Shifting Occupational Mix In Developed Economies Favors Uniquely Human Activities**

*Occupation By Activity Type In US*

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Change in share of occupation mix (2010–19)</th>
<th>Forecasted share for 2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare &amp; social services</td>
<td>+1.1%</td>
<td>➜</td>
</tr>
<tr>
<td>Management</td>
<td>+0.9%</td>
<td>➜</td>
</tr>
<tr>
<td>Scientific &amp; technical services</td>
<td>+0.8%</td>
<td>➜</td>
</tr>
<tr>
<td>Business services</td>
<td>+0.7%</td>
<td>➜</td>
</tr>
<tr>
<td>Hospitality</td>
<td>+0.5%</td>
<td>➜</td>
</tr>
<tr>
<td>Transport &amp; logistics</td>
<td>+0.3%</td>
<td>➜</td>
</tr>
<tr>
<td>Personal services</td>
<td>+0.1%</td>
<td>➜</td>
</tr>
<tr>
<td>Arts &amp; entertainment</td>
<td>0.0%</td>
<td>➜</td>
</tr>
<tr>
<td>Education</td>
<td>–0.1%</td>
<td>➜</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>–0.2%</td>
<td>➜</td>
</tr>
<tr>
<td>Agriculture</td>
<td>–0.3%</td>
<td>➜</td>
</tr>
<tr>
<td>Construction &amp; extraction</td>
<td>–0.4%</td>
<td>➜</td>
</tr>
<tr>
<td>Cleaning &amp; maintenance</td>
<td>–0.7%</td>
<td>➜</td>
</tr>
<tr>
<td>Sales</td>
<td>–2.3%</td>
<td>➜</td>
</tr>
</tbody>
</table>

Note: Activity mix based on scoring of 2,000 underlying activities across 900 occupations; activities are weighted based on the importance to each occupation

Sources: ONET; BLS; Bain analysis
The big challenge ahead will be determining how to transition workers from declining occupations to jobs of the future. Fortunately, the list of jobs that displaced workers in lower-skill occupations can perform, when given the right training and support, is nearly endless. The Internet has changed the economics of knowledge, giving workers in many occupations access to the information they need to do their jobs with the click of a button. In this environment, a worker’s underlying capacity for problem solving, creativity, and interpersonal connection have a much greater effect on performance. So how can business leaders help workers develop these capabilities?

First, consider problem solving. The notion that intelligence is fixed from an early age, with neuroplasticity declining over time, is outdated. The prevailing belief among scientists today is that the brain is more like a muscle, and its performance can be meaningfully enhanced throughout our lives. Research shows that equipping workers with the right set of thinking strategies—including establishing perspective, disaggregating the problem, framing, and deploying analogical reasoning—can greatly improve their decision making at work. We also know that the relationship between IQ and economic success is weak, with many higher intelligence individuals trapped in low-skill jobs that prevent them from fully exercising their potential for solving complex problems.

Second, consider creativity. While true creative genius may be rare, evidence shows that the everyday creativity required for success in jobs of the future can be taught by introducing workers to the right techniques. It is even more important, however, to create an environment that allows workers’ creativity to flourish. This requires high levels of both formal and informal interpersonal interaction, as well as a clearly communicated openness to fresh ideas and tolerance of failure. In recent decades, the relentless focus on efficiency has conveyed to many workers—particularly those outside of knowledge occupations—that hard work and compliance, not creativity, are the paths to success. When we asked workers which attributes they felt their company wanted from them in their role, only 17% of US workers in manual, service, or administrative jobs ranked creativity in the top three, compared with 35% of workers in knowledge jobs. The picture is similar across other Western markets. In developing markets, however, 52% of workers across occupations ranked creativity highly, compared with an average of 30% across Western markets. The rapid pace of growth and demands for continuous adaptation in the emerging world have often fostered a culture of innovation at all levels of the firm. The focus on stable earnings growth in advanced economies typically has not.

Finally, consider interpersonal connection. Emotional intelligence is primarily determined by personality type—in particular, what psychologists call ‘agreeableness.’ Research shows a negative correlation between agreeableness and income level, which could suggest that, in recent decades, those who adopted a more aggressive approach to interpersonal interactions have achieved more professional success. However, empathy, introspection, and behavioral adaptation will be increasingly critical in the jobs of the future. And today’s low-skill workers will have significant value to bring to the table in this respect. There is also ample evidence that interpersonal skills can be actively cultivated, particularly through behavioral modeling.
The Covid-19 pandemic has profoundly shifted the way workers interact with their firms, forcing many to work from home rather than the office. Many will be reluctant to return to full-time office work and the new equilibrium is unclear. Most firms will adopt a hybrid model, but exactly what this looks like—and what it takes to succeed—remains murky.
The pandemic demonstrated that many workers can perform far more of their duties remotely than anticipated.

Even before the pandemic, the traditional worker-firm relationship was morphing. The gig economy, born during the 2007–09 financial crisis, allowed workers to take on multiple piecemeal jobs to make ends meet. It surged in prominence over the last decade, as platforms such as Careem, Talabat, and Kitopi shot onto the scene. Skilled staff, working remotely and sometimes based outside of the country, were especially important to firms in the GCC buying in or developing their own expertise in everything from marketing to IT.

Together, the rise of work-from-home and the gig economy have loosened the boundaries of the firm, making the ideas of a workplace and a worker more fluid. Advances in communication technology and the emergence of new digital platforms are allowing firms to shift an increasing share of work outside of their traditional boundaries, reducing costs and improving flexibility.
First, consider gig work, also known as contingent labor (including temporary workers, contractors, and freelancers). While some workers take on contingent roles out of choice, they tend to be the select few in higher-skilled, higher-paid roles. The majority are lower-skilled workers who take these roles out of necessity when permanent roles are not available. And these lower-earning contingent workers experience a meaningful gap in job satisfaction when compared with permanent employees with a similar income (see Figure 4.1).

In the GCC, we found that 67% of employed workers were satisfied with their jobs, compared to just 53% of contingent workers. That fell to 39% for high-income contingent workers.

From the perspective of workers, however, these changes are a mixed blessing.
For firms, the appeal of contingent work varies based on the type of work.

Higher-skill contingent workers are valuable when the firm needs access to specific expertise. Firms tend to rely on lower-skill contingent workers when there’s a desire to shift to a more variable cost base, for greater responsiveness to volatile demand. In Saudi Arabia, around a third of the workforce comes from abroad, with the country heavily reliant on imported skills for high-skilled work such as IT, as well as for workers in sectors such as construction. In 2020 the country eased its system of employer sponsorship to make it easier for companies to access foreign expertise, and for foreign workers to base themselves in Saudi Arabia. Countries in the GCC need the flexibility to call on outside workers as necessary.

Figure 4.1: Employed Workers More Satisfied With Their Jobs, Compared To Contingent Workers

Job Satisfaction By Employment Type, Middle East

Note: Middle East consists Saudi Arabia and UAE; Permanent employees include full time employees who work 20+ hours; Contingent workers includes temporary workers, contract workers and freelancers; % of contingent workers is a proportion of full time, part time and contingent workers; Results are mean normalized
Source: Bain Worker Survey (n=3k)
“Even if the lion’s share of white-collar work can be done remotely, that does not necessarily mean it should be”

Next, consider the long-term outlook for remote work. The pandemic demonstrated that many workers can perform far more of their duties remotely than anticipated. To explore the maximum potential for continued remote work, we examined around 2,000 underlying activities across approximately 900 occupations and identified the share of tasks that could be performed from home, given the current state of technology (see Figure 4.2).

Our findings conform closely to the story of the pandemic: White-collar workers in knowledge and administrative jobs, alongside teachers, performed most of their responsibilities from home. And those in manual and service jobs, alongside healthcare workers, either continued going in as essential workers or found themselves out of work.

Figure 4.2: The Potential For Remote Work Is Primarily Confined To White-Collar Workers

Tasks That Can Technically Be Performed Remotely By Occupation, % Of Total

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Knowledge jobs</th>
<th>Administrative jobs</th>
<th>Care jobs</th>
<th>Service jobs</th>
<th>Manual jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business services</td>
<td>94</td>
<td>85</td>
<td>81</td>
<td>78</td>
<td>76</td>
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<tr>
<td>Management</td>
<td>85</td>
<td>81</td>
<td>78</td>
<td>76</td>
<td></td>
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<tr>
<td>Office administration</td>
<td>85</td>
<td>81</td>
<td>78</td>
<td>76</td>
<td></td>
</tr>
<tr>
<td>Scientific &amp; technical services</td>
<td>81</td>
<td>78</td>
<td>76</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales</td>
<td>78</td>
<td>76</td>
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<tr>
<td>Agriculture</td>
<td>76</td>
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<tr>
<td>Healthcare &amp; social services</td>
<td>76</td>
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<td>Personal services</td>
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<td>Manufacturing</td>
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<td>Transport &amp; logistics</td>
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<td>Hospitality</td>
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<tr>
<td>Cleaning &amp; maintenance</td>
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</tbody>
</table>

Notes: Remote work potential based on scoring of more than 2,000 underlying activities across approximately 900 occupations; activities are weighted based on the importance to each occupation

Sources: ONET; BLS; Bain analysis
Together, these categories represent about 30% to 40% of all workers in developed economies, but only about 10% to 20% of workers in developing markets. And developing economies face several factors that likely reduce the number of remote workers even further, including slower, less reliable, and less ubiquitous Internet, as well as the challenges of multigenerational living arrangements and more children per family.

Even if the lion's share of white-collar work can be done remotely, that does not necessarily mean it should be. There are two factors to consider: the impact of remote work on productivity, and the desires of the workers themselves. These questions are especially acute in the GCC, which must attract and retain foreign workers on the one hand and use skilled people working remotely from abroad on the other.

Whether remote work is as productive as in-person work remains to be seen. A study of 10,000 workers at an Asian technology company from April 2019 to August 2020 found that workers were putting in more hours from home, but there was no detectable increase in output. Why? Researchers found the amount of time spent in meetings increased, perhaps due to the complexities of remote coordination and supervision. Meanwhile, the time available for uninterrupted individual work fell. Data from the US Survey of Working Arrangements and Attitudes shows that 50% of workers felt their overall productivity had increased while working from home, but 71% attributed most of the gains to time saved from not commuting.

The impact of working from home on productivity also seems to vary from activity to activity. Research from prior to the pandemic suggests that activities requiring a high degree of collaboration or significant interdependence tend to be more productive when performed in-person. The challenge is that these activities represent a growing share of white-collar workers’ jobs.

Given this lack of clarity, leading companies are following different paths in terms of their remote work models. Careem, a UAE-based regional super-app, has embraced a remote-first approach, for example. Companies have institutionalized ‘flexible working’ environments where employees can spend up to three days working from home, with many firms opting for a remote Friday.

Firms also need to consider what their workers want. In the GCC, foreign workers want to be able to stay in the countries they work in and make a career and life there, requiring a flexible visa scheme. They might also need to switch between home and work locations, making it essential they can work remotely.

Our survey found that, post-pandemic, two thirds of workers in the GCC are reconsidering their work-life balance.

Fewer than 10% want to work full-time in the office, well below the global average of 20%. The region does fit with a universal preference to continue at least doing some work remotely with a stronger preference for a hybrid approach (65% in the GCC vs. 43% globally).
GCC policymakers must react to the strong demand for home or hybrid working by enacting the sort of flexible visa and work conditions that allow workers to thrive, without a requirement for full-time office work.

As an example, the UAE has revamped its labor laws to create six different working models offering people varying degrees of flexibility over working arrangements.7

![Figure 4.3: GCC Workers Reconsidering Their Work-Life Balance Due To The Pandemic Is Higher Than Other Developed Countries]

![Figure 4.4: Most GCC Workers Prefer A Hybrid Arrangement, Few Would Prefer To Never Work From Home]

Chapter 5

Younger Generations Are Increasingly Overwhelmed
Not only has Covid-19 led to a tragic loss of life around the world, but it has also caused immense psychological strain.

Individuals have coped with grief, adapted to social isolation, and reconfigured the way they work, all at the same time. The pandemic has undoubtedly been an example of what sociologists call a ‘collective trauma’ event. That is clearly the case in the GCC, with its young and international population. Younger people are more stressed in the UAE (56% say they are stressed, compared to 52% of older workers), but younger people actually feel less overwhelmed in Saudi Arabia (47% versus 49%). While this compares well to many rich countries, it is generally lower than most highly developed ones—the figure is 69% in Japan, for example, and 63% in the US.
Figure 5.1: Younger Workers in UAE Are More Stressed Than Older Workers; In Saudi Arabia Younger and Older Workers Are Similarly Stressed

Proportion of Respondents Who Feel Stressed/Overwhelmed (%)

However, stress levels have been rising for some time now, particularly for younger generations. Although longitudinal data over an extended time period is sparse, even in the last decade, the reported stress levels across generations has started to diverge. Generation X, Generation Y (also known as millennials), and Generation Z no longer experience the steady decline in stress that has historically been associated with aging (see Figure 5.1).

Figures 5.2: Stress Levels Are Diverging Across Generations

Average Stress Levels by Generation, US

Source: American Psychological Association Stress In America™ surveys
Unlike Older Cohorts, Younger Generations Are Grappling With A New Mix Of Stressors

The combination of slowing economic growth, rising inequality, and declining housing affordability across the West has made it far more difficult for younger workers to attain financial stability.

Of all these issues, the economic stressors matter most to young workers. The odds of achieving absolute upward mobility—earning more than one’s parents—are the lowest they have been in the US for any generation since World War II. For the Silent Generation, about 90% of workers could expect to earn more than their parents, with the figure even higher for all but the wealthiest families.

Two factors have contributed to the decline in absolute upward mobility: slowing growth and rising inequality. The youngest generation of workers has seen inequality skyrocket, as the earnings gap between those who enter high-skill professions and those who do not continues to widen. The growing income premium for a college degree certainly plays a role in this story. But it’s now estimated that more than 40% of recent college graduates end up in jobs that do not require higher education. Today’s labor markets are increasingly characterized by a winner-takes-all dynamic, where a small number of graduates capture a vast majority of the returns on education.

In places like the US, where higher education receives limited public funding, universities are also saddling workers with crippling debt. In Europe, younger workers are often spared the burden of student debt, but youth unemployment has reached crushing levels—37% in Spain, 29% in Italy, and 19% in France—as the fallout of the financial crisis more than a decade ago continues to limit opportunities.

On top of everything else, younger workers will grapple with the burden of caring for an aging population. They also face the challenge of paying down public debt, which has ballooned as a result of the pandemic, at a time of slowing macroeconomic growth.
Conclusion

Together, The Five Forces Reshaping Work Confront Us With Two Questions

First, what will it take in this new era for individuals to reach their full potential at work? Second, how can firms close their talent gaps and build a competitive advantage through a winning talent proposition?

Highly skilled people from abroad and locally developed talent were always a source of competitive advantage that helped GCC countries, and the region, thrive. Now, countries must find ways to encourage them to stay in the region, give them flexibility over where and when they work, and build on their existing skills.
From Talent Taker To Talent Maker

Firms’ talent needs are more dynamic than ever, as a result of rapid technological change and the accelerated cut and thrust of this new era. For many established firms, the default answer has been to look externally, hiring workers who already have the skills required, and letting go of those that do not. The insurgent firms that are running circles around their larger competitors are taking a different approach. Their rapid growth is forcing them to take a harder look at workers’ underutilized potential and offer opportunities for growth to everyone, up and down the hierarchy.

Scale Up Investments In Learning

Incumbents Have A Hidden Asset In The War For Talent: A Large Existing Workforce

But making the most of this asset requires investment. Spending on learning was a key casualty of the shareholder primacy era,8 as firms shifted the burden back on workers. With the pace of change accelerating, leading firms are beginning to realize that this approach is no longer cutting it.

AT&T now invests around $250 million annually in T University, which enables existing employees to develop in-demand expertise in areas such as data science and cybersecurity. It also provides anywhere from $15 million to $34 million annually in tuition aid to support employees with learning outside of the company. Walmart has also recently announced that it will pay 100% of college tuition fees for associates as part of its Live Better U program.

8 https://www.bain.com/insights/from-shareholder-primacy-to-scale-insurgency/
For firms that take this seriously, learning will quickly become one of their single biggest investment items, making it a CEO-level issue. And this big investment will come with big choices:

**Hard Skills vs. Soft Skills:** Hard skills are the specific and measurable abilities required for a job—for example, coding software or handling accounts. Soft skills are the more transferrable but less quantifiable traits that shape performance—for example, framing or empathy. While both will be essential in the jobs of the future, we expect the accelerating rate of technological change will dramatically reduce the half-life of hard skills and elevate the importance of soft skills.

**In-House vs. Partnerships:** External education partners can bring not only relevant expertise, but also greater experience in effective training. For many firms, particularly those at a scale disadvantage, such partnerships will be critical. Chipotle followed this model, establishing a partnership with Bellevue University in 2017.

**Concentrated Training vs. Ongoing Apprenticeship:** While intensive bursts of training save experts’ time, the true mastery of a task generally requires ongoing apprenticeship with an experienced colleague. However, firms’ rapidly evolving talent needs will create challenges in establishing and maintaining these apprenticeship chains.
Think Laterally About Career Journeys

Many firms continue to invest in ‘future leaders’ programs that propel junior managers up the corporate hierarchy. To make the most of their workforces, however, firms will need to widen their talent funnels, by drawing on people who are neither suited to, nor necessarily interested in, general manager roles. As our survey shows, the archetype mix of executives is drastically different from that of the overall population.

The professional management system continues to cast a long shadow over how firms think about learning and development, prioritizing generalist skill sets, and vertical career ladders. Instead of trying to create all-rounders, firms should cater to the diverse strengths and interests of their workforce. This requires unbundling traditional manager roles and getting creative with lateral moves.

Cultivate A Growth Mindset

Traditionally, workers could expect to follow a linear learning model, in which they gain stable foundations in the first decades of life, with the workplace acting as a kind of finishing school. However, as skills become obsolete at an accelerating pace, this model is no longer working.

Workers will need to start viewing their current skill set as a depreciating asset. Firms will want to encourage a middle ground that elevates the importance of adaptability without devolving into dilettantism.

9 https://www.bain.com/insights/is-the-professional-management-system-broken/
More broadly, firms need to create better visibility for themselves and their workers on their evolving talent needs. Many companies lack a meaningful understanding of what their talent requirements will be in five or more years’ time, and it’s unrealistic to expect staff to work this out on their own.

The government can play a crucial role in the development of workers in the country by introducing policies to support people’s professional development. Saudi Arabia and the UAE already offer professionals the chance to further their development. For example, in the UAE, “The Future Leaders Programme” was launched by the Government to prepare younger people to meet the goals of the UAE Centennial 2071. Those programs tend to focus on single career development. In contrast, Singapore launched leadership development programs allowing rotations across three public sector careers sector over a period of 2–3 years. After that, young leaders can choose their preferred path. This can be a differentiating factor answering the growing need for flexibility among workers as highlighted previously.

Highly skilled people from abroad and locally developed talent were always a source of competitive advantage that helped GCC countries, and the region, thrive. Now, countries must find ways to encourage them to stay in the region, give them flexibility over where and when they work, and build on their existing skills.

Workers ≠ Machines

Workers are not automatons. Compared with building widgets or transposing data, workers’ ability to excel at the uniquely human tasks that will increasingly dominate work is far more dependent on their underlying emotional state. With human skills come human frailties, which means firms will need to take a more empathetic approach to managing workers in the decades ahead.
Build Personal Capacity

Some may take the view that the overall wellbeing of workers isn’t a firm’s responsibility, arguing that a job is only one part of people’s lives. We believe this is misguided. For one, technology has blurred the boundary between our work and our personal lives. And perhaps most importantly of all, a failure to help workers will eventually lead to widespread burnout and the firm’s inability to stay afloat amid rising turbulence.

At many firms, green shoots of a mindset shift emerged during the pandemic, as managers became more aware of the multiple stressors affecting their teams. Many leaders recognize that mental health is a relevant issue.

Redesign Workflows For Humans

The way we organize work today not only adds to the psychological strain on workers, but also limits their ability to perform at their best. The rhythms of work are not designed for the realities of the human brain.

120 The average office worker receives around 120 emails per day.

But this model is deeply unsuitable for the jobs of the future. Cal Newport draws a distinction between ‘deep work,’ where our brain is fully engaged in the task at hand, and ‘shallow work,’ where we are operating on autopilot. And that makes email the enemy of deep work—at least the way most office workers use it today.
One alternative is more meetings. However, in many organizations, meetings tend to be inefficiently run, with no clear decision drumbeat and too many nonessential participants. They often deplete our energy, leaving less for deep work. A more basic solution is clearer team protocols around email usage. Workers should be judged based on their results, not their responsiveness. Many firms are also embracing project management tools like Asana or Trello to create a more streamlined and curated flow of information, though few large organizations have encouraged adoption to the point of meaningfully displacing email.

For instance, an Artisan whose role offers little autonomy to exercise her craft and limited opportunities to work on things that excite her may begin to feel as though she’s wasting her life. But targeted changes to the employee value proposition can make all the difference. 3M famously allows its engineers to spend 15% of their work hours on personal projects. Google, with a similar program, has produced several breakthrough innovations—including Gmail and Google News—over the years.

Similarly, an Operator whose role prevents him from being present at key family moments may question whether his job is giving him the life he wants. Offering him greater flexibility and predictability in working hours, while protecting his time off, would likely make a substantial difference in his happiness and engagement, at little expense to the firm.

Helping individuals find purpose as they define it isn’t easy. It requires tailoring employee experiences in a way that does not create an excessive administrative burden. It also requires fostering a company culture that actively encourages introspection and trust-based dialogues between workers and their managers. An arm’s-length relationship between firms and their workers is increasingly unsustainable.

Governments have a big role to play in moderating the relationship between employer and employee, and adopting policies increasingly focused on people’s wellbeing.
One example is the Abu Dhabi Early Childhood Authority’s recently announced parent-friendly label, which recognizes companies offering parents a favorable working environment. Such government efforts can encourage healthy competition between firms vying to attract the best talent.

Out Of Many, One

Successful firms of the future will become more diverse. Countries looking to thrive will embrace diversity. Part of this is demographic diversity. Firms and governments that break down the barriers of gender, sexual orientation, ethnicity, background, and age won’t just be able to tap into historically underrepresented talent pools. They will also improve performance through, for example, reducing groupthink and unleashing the innovation that comes from incorporating multiple perspectives.

Beyond demographic factors, the imperatives of building and reinvention require the firm and government of the future to draw on a widening array of skill sets. Walmart has built up a team of more than 15,000 technologists; Goldman Sachs needed to bring in not only product managers and software engineers, but also call center workers. GCC countries are increasingly investing in their digital economy, too, attracting global players such as Amazon, Microsoft, and Google to the region to transfer their talent and know-how.

Create A Shared Vision And Values

Our ability to act together at scale is one of the key factors behind our success as a species. Nations rise and fall on their ability to sustain cooperation, and so do companies. A successful business adds up to more than just a network of individuals.

For example, Apple’s talent pool spans a broad spectrum, ranging from creative designers to hardware engineers to retail salespeople. Yet all are united by a few shared traits that make the business so distinctive: attention to detail, unrelenting optimism, going above and beyond to delight customers, and a passion for innovation, to name a few. Similarly, Saudi Arabia’s Vision 2030 commits it to creating a “vibrant society where everyone enjoys a rich, happy, and fulfilling life,” creating a shared vision for everyone living in the country.

Build Tribes, Not Tribalism

Homophily—the tendency to gravitate toward people who seem similar to us—is part of human nature. With time, groups of like-minded individuals form a distinctive way of speaking, set of rituals, and common identity. As firms and governments draw on an increasingly diverse set of worker profiles, it’s inevitable they will start to see the emergence of distinguishable groups.

This process should be encouraged, not feared. Governments should change their policies to foster equity and transparency in the labor market and remove artificial barriers to entry. This is becoming an imperative, especially when countries want to attract global talent and expertise.
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