

## **Middle East & Africa Workforce Management Software Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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### **Report description:**

The Middle East & African workforce management software market is estimated to record a CAGR of about 13.85% over the forecast period 2022 to 2027. The COVID-19 pandemic had an adverse effect on the workforce sector. A shortage of workforce, infrastructure, essential drugs, proper treatment, and disruption in manufacturing facilities and supply chain was experienced, reducing most sectors' functioning. A loss of stability was witnessed in all potential end-user verticals.

### **Key Highlights**

Businesses across the Middle East are implementing ambitious transformation roadmaps to ensure their relevance in the digital world. The adoption of third platform technologies, such as cloud, mobility, and social, is becoming mainstream throughout the region.

As Saudi Arabia advances toward becoming the technology hub in the region, the country predicts cloud computing to grow by 25% by 2022. These findings were announced over the second edition of Microsoft Transform 2018, organized by Microsoft Saudi Arabia, for fostering the latest digital trends.

In November 2020, Johnson Controls, the global leader for smart and sustainable buildings, announced the launch of a new flexible service suite to its customers in Middle East & Africa. The new service suite will leverage Johnson Controls OpenBluedigital technology to power remote and contactless services in combination with its 130 years of expertise in green building services. The Industry Revolution 4.0 has been one of the greatest trends in the region. Along with the rapidly growing 5G infrastructure, digital transformation is expected to grow significantly over the forecast period.?

MEA Workforce Management Software Market Trends

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## Demand for Optimized and Cloud-based Workforce to Drive Market Growth

In the Middle East & Africa, cloud services have grown rapidly over the past few years. The arrival of advanced and high-scale cloud service providers is expected to pave the way and spread the adoption of secured cloud-based services in Middle East & Africa. South Africa is leading this adoption, with Microsoft coming up with two data centers for Azur. Further, AWS opened its Region here in 2020, suggesting an increased need for workforce management solutions in the region.

During the COVID-19 pandemic, there was an increase in the adoption of online and cloud-based workforce systems to stabilize the remote working environment. It is one of the main factors boosting market growth. Moreover, it is very important to achieve a competitive advantage over rival companies. Some of the major factors fuelling market growth are customers and employee engagement.

Concerns associated with data privacy, lack of professionals who can support cloud-based work, and remote locations with connectivity issues are some factors hindering the market's growth. In addition, AI-based solutions, an increasing number of data sources, high-volume HR data, and trained individuals are helping in creating new opportunities and revenue growth for market players.

Big enterprises want to optimize the workforce and operate them globally. Manufacturing products, employees, customers, and IT services of the industry directly impact the revenue. Online or mobile applications are cutting extra system costs previously used to manage the workforce. New advanced features like scheduling tasks, real-time alerts, attendance tracking, and online discussions/meetings are expected to gain high traction. It is expected to boost the market growth further.

Even after the pandemic is over, companies, as well as employees, are willing to work from home as it gives them more flexible working hours, cost-effectiveness, and time management. The market is growing because of awareness regarding the advantages associated with workforce management. Moreover, with increases in the number of medium and small businesses and populations, the market is expected to witness a high CAGR over the coming days.

## Healthcare to Hold the Largest Market Share

The migration of their health workers has badly damaged the inadequate health systems of Middle East & Africa, with only 2.3 healthcare workers or doctors per 1,000 population. This region is economically weaker than Europe. The health services of this region are facing daunting challenges to deliver the minimum standard of healthcare. There is a continuous need for government and political funding. Over the past few years, the healthcare sector has been getting workforce management software support and funds. It is estimated that the market will grow exponentially during the forecast period.

The healthcare sector positively impacts the growth of overall healthcare workforce management. The market is witnessing innovations and effective solutions, which can be used to manage the workforce without compliance risks. The market is divided based on various types of services, software, end-users, geography, and mode of delivery. Further, the software market is segregated into integrated and standalone software.

Standalone software includes solutions for attendance, time, HR and payroll, scheduling, analytics, and talent management. Since the last decade, there has been a growing demand for workforce management solutions among healthcare workers and providers across the world. The need to reduce the labor cost in healthcare systems and hospitals, consolidation in the healthcare sector and increase in operational efficiency are among the factors driving the market.

The growing demand for healthcare professionals and benefits associated with workforce management systems like flexible scheduling and transparency are expected to boost the adoption of workforce management solutions in the healthcare sector. At the same time, the solutions' data security, high maintenance, and implementation costs are restraining market growth.

The increase in competition and demand for alternatives are expected to drive innovation in the market. Healthcare organizations are generally open 24\*7 and need all-time service, so managing the healthcare workforce is complex. It needs proper tracking of time and scheduling of workforce to deliver quality services to patients and maintain the workflow.

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## MEA Workforce Management Software Market Competitor Analysis

The Middle East & African workforce management market is highly fragmented due to the presence of players like Oracle, Sierra Data Systems, ADP, Kappix, SAP, Kronos Incorporated, and Hydra Management. They are upscaling the market with substantial R&D investments, driving toward the sustainability and digitization of the Middle East & African workforce management market.

In December 2021, Medallia launched an on-site cloud operation in Saudi Arabia. By offering its platform on servers based in Saudi Arabia, Medallia offers its domestic clients a fully compliant cloud technology solution that can be tailored to the specific needs of local organizations.

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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