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The Impact of COVID-19 on the Saudi Labor Market
Within a Global Context

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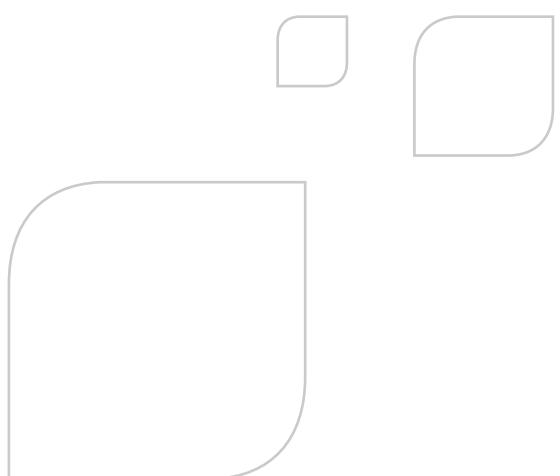


INSIGHT PAPER

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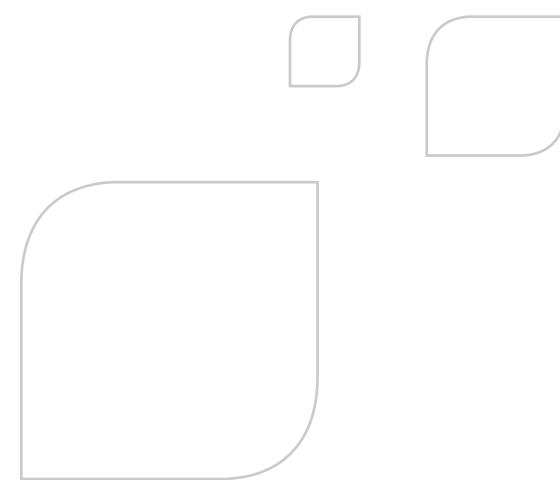
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INSIGHT PAPER



Introduction

The COVID-19 pandemic has left an indelible mark on the world. As of the end of September 2020, over 33 million confirmed cases and almost 1 million deaths have been reported worldwide, with G20 economies accounting for 76% of all cases and 86% of all deaths⁽¹⁾. It has brought about unprecedented disruption to global labor markets with 94% of the world's workers living in countries where some sort of workplace closure measures are in place⁽²⁾. Across the world, workers are experiencing job losses, suspended employment relations, reduced working hours and income loss.

There has been a sharp decline in the number of employed people at work, with variations in impact being seen across the world. For example, between December 2019 and April 2020, the decline in the number of employed people ranged from nearly 40% in Mexico to around 8% in Japan and Korea with eight times the total decline experienced during the Global Financial Crisis. It is estimated that working hours may have declined by 14% between the final quarter of 2019 and the second quarter of 2020 which is equivalent to approximately 400 million full-time jobs⁽³⁾.

While some countries have started to lift restrictions, the prospect of a second wave is already a reality in some countries and, with the

full impact of COVID-19 on labor markets, economies and societies, as yet, unknown, it is important that measures to mitigate the impact of the pandemic are considered within the longer term.

It is therefore clear that the impact of the pandemic has important consequences for policy responses and has challenged governments to react quickly to address them. The three key dimensions of the challenges that require effective policy responses are health, social, economic and fiscal impact⁽⁴⁾.

Economically, many sectors and global value chains are being affected, especially within certain sectors such as tourism, retail, manufacturing, and trade. For example, the accommodation and food services sector, which employs around 144 million workers, of which more than 70% are women, is experiencing significant closures and a steep decline in demand. From a business perspective, Small and Medium Sized Enterprises (SMEs) are the most vulnerable to the impacts of the pandemic⁽⁵⁾. In terms of the fiscal impact, governments across the globe are facing increased expenditure and reduced revenues⁽⁶⁾. These challenges will be reported in further detail in subsequent sections of this paper.

The Saudi Arabian government was quick to respond to the COVID-19 pandemic with a sizeable fiscal stimulus package to help alleviate the impact of the pandemic on the national economy and the Kingdom's labor market. The policies and associated stimulus packages that were introduced aimed to tackle various challenges including public health, cash flows, job retention, social protection and business support. Section 2 of this paper provides analysis of the government's policy responses to the crisis as well as initial impacts on the national labor market from an employment and sectoral point of view.

This paper will examine the effect of the COVID-19 pandemic on the Saudi labor market within a global context. First, global labor

market challenges will be discussed followed by an analysis of Saudi Arabia's labor market and policy responses to the pandemic. The final section will explore the future outlook of global and national labor markets as countries move towards the post-confinement phase and second waves of the COVID-19 pandemic.



Labor Market Challenges

The COVID-19 pandemic has posed significant challenges for policy-makers across the globe. Due to the consequences of lockdowns, businesses have had to downsize or even close because of reduced demand, which has led to laying off many employees. Workers in new forms of work as well as the self-employed are also seeing reduced demand in services and therefore incomes. **It is important that targeted policies are developed to address the multifaceted challenges within labor markets efficiently and effectively.**

Challenges include the following:



Social Protection Policies

Social protection systems of many countries have been challenged, reviewed and adapted to ensure adequate social protection for all who require it, when required. Women, youth and workers in the gig and informal economies and freelance workers are among cohorts that have been severely impacted by the pandemic and have little or no access to adequate social protection⁽⁷⁾.

The G20 Labour and Employment Ministers met on April 23rd, 2020, at a meeting chaired by the G20 2020 Saudi Arabia Presidency, His Excellency Engineer Ahmed AlRajhi, Minister for Human Resources and Social Development, where the Ministers prepared and issued a statement on COVID-19. **This statement included commitments to:**

- make every effort to protect our workers, particularly those who are considered vulnerable and not covered by adequate social protection - to avoid leaving them even further behind.
- ensure that our social protection systems are sufficiently robust and adaptable to provide adequate support for all workers in need, regardless of their employment status, age or gender.

During the Saudi Arabian G20 Presidency, the Employment Working Group named social protection as a policy priority area. The key outcome of this policy priority is to ensure that all workers have access to adequate social protection, regardless of job classification, while also committing that families also need to be supported throughout the duration of the pandemic and the recovery period.



Women Employment

The COVID-19 pandemic has exacerbated the socio-economic vulnerability of women and girls, which includes earnings and job retention, health, unpaid care work and gender-based violence in the workplace. Typically, women face significant barriers to entering the labor market⁽⁸⁾. Discrimination and stereotypes

gender pay gap, care and household responsibilities between women and men, opportunities in leadership roles and career progression. The pandemic risks worsening these barriers and widening the gender pay gap. Therefore, governments must develop targeted policy responses towards women within their COVID-19 recovery plans to help alleviate the negative impact on women's access to decent work.



Youth at Risk

Youth are particularly vulnerable as a result of the COVID-19 pandemic and many are now at risk of being left behind in education, economic opportunities, and health and wellbeing during a crucial stage of their life development⁽⁹⁾. Prior to the global crisis, young people between 15-24 years were already three times more likely to be unemployed than adults. The pandemic risks worsening youth unemployment rates. Young people also often find themselves working in new forms of work and the informal economy and therefore have access to limited social protection. Similar to the 2009 global recession, it is predicted that youth unemployment rates will soar due to the impact of the pandemic on the economy.

It is not only youth unemployment numbers that are likely to be impacted negatively as a result of the COVID-19 pandemic, but also vulnerable youth such as the number of youths not in employment, education or training (NEET) is likely to increase due to disruption in education due to school closures, with 91% of students unable to attend school. The impact

on poorer students will be disproportionate due to digital connectivity, as well as on children relying on nutritional help from schools.

Targeted socio-economic policy responses towards youth are required as well as social protection programs such as unemployment support, paid sick leave, access to healthcare and cash transfer payments targeted towards young people should be expanded even if for a temporary period.



Small and Medium Sized Enterprises (SMEs)

SMEs constitute significant generators of employment growth. The size of SMEs has made them particularly vulnerable to the impacts of the pandemic, due to their lower resilience, lower cash reserves to maintain employee salaries, and the higher likelihood of bearing the brunt of the costs associated with the shock⁽¹⁰⁾.

The impact of COVID-19 on SMEs can be felt on a number of fronts including both the supply and demand side. On the supply side, businesses experience a decrease in labor supply, due to workers falling ill or having to look after children or other dependents during school closures and restrictions on movements. Additionally, the interruption of supply chains can also lead to shortages in goods⁽¹¹⁾.

On the demand side, an abrupt loss of demand and therefore revenue, severely impacts liquidity and the ability of SMEs to function. The effects are worsened due to laying off workers and companies unable to pay wages⁽¹²⁾.



Informal Economy

The informal economy in 2020 is made up of around 2 billion workers, equivalent to 62% of total employed people globally. Most workers in the informal economy are from low and middle-income countries. Similarly, enterprises within the informal economy, that are usually small and unregistered, make up 8 out of every 10 enterprises globally. These enterprises are vulnerable to economic shocks because they are usually excluded from any COVID-19 related financial assistance⁽¹⁴⁾.



Occupational Health and Safety

The COVID-19 pandemic has resulted in Occupational Health and Safety risks due to inadequate protection and increased likelihood of suffering from illness or death as a result of the virus. Businesses have had to implement safe working measures such as social distancing as well as increased levels of hygiene maintenance at workplaces. Furthermore, workers in new forms of work, gig and informal economies often do not have access to adequate healthcare and have extremely limited access to injury or sickness benefits. Those who can bear the costs of health care are more likely get into debt and are exposed to the increased risk of financial loss.



Sectoral Challenges

COVID-19's impact has been more acutely felt by some sectors over others, such as the tourism, aviation and cultural sectors. Conversely, some sectors have proven to be indispensable in confronting the pandemic, halting the spread of the virus, and providing, what have come to be known as, "essential services".

Lockdown measures, which are estimated to have impacted 2.7bn workers and 81% of the global workforce⁽¹⁵⁾, have had a significant impact on the ability of multiple sectors to function as normal. International aviation has come to an almost immediate halt at the beginning of the pandemic, with most countries still upholding major travel restrictions⁽¹⁶⁾.

The impact on employment, and on the sector at large, has been devastating. It is estimated that a contraction of between 45-70% of the international tourism economy, as a result of global efforts to contain the pandemic⁽¹⁷⁾. The tourism industry accounts for approximately 330 million jobs and 10.3% of global employment⁽¹⁸⁾, millions of whom have been negatively impacted, through the accommodation and food services sub-sectors or workers of SMEs, which represent most tourism enterprises.

Global supply chains faced major disruptions as a result of international travel restrictions and stay-at-home requirements due to COVID-19. This resulted in major disruptions in, and even complete halting of, several industries, including food and beverage companies⁽¹⁹⁾, textiles and clothing industries⁽²⁰⁾, manufacturing, agriculture and transport. The mining industry, alongside other commodities sectors, has also faced government mandated shutdowns and declines in demand⁽²¹⁾.



National Policy Response

Saudi Arabia launched timely policy responses to mitigate the effects of the COVID-19 pandemic on the labor market at the start of the crisis. These include stimulating the economy and employment, supporting enterprises, jobs and incomes, protecting workers in the workplace and relying on social dialogue for solutions.



Stimulating the economy and employment

The Kingdom's fiscal policy included a number of allowances and stimuli to support the Saudi economy and employment. A stimulus package was announced for the private sector of over 70bn SAR, including exemptions and postponements of government taxes and fees, with an emergency budget introduced in 2020 to cover costs of the crisis. A VAT increase from 5% to 15% was also announced to take place starting July 2020, with cost of living allowances to also be suspended. In March

2020, SAMA reduced policy rates twice by 75 basis points from 1.75% to 1% then from 1.25% to 0.5%.

Specific sectoral support was also announced. This includes:

- Health – In April 2020, support of SAR 47bn to raise health sector's readiness, securing medicines, operating additional beds and medical supplies.
- Transport – support for self-employed individuals registered with the Transport Authority.
- Ministerial Committees – part of the SAR 70bn stimulus package support to study the impact of the crisis on sectors, regions and to develop solutions, including Energy, Trade, Tourism, Entertainment and Sports, Industry and Mineral Resources and Logistics Services Committees.
- Saudi Development funds postponement of repayment of loans in sectors such as industry and agriculture.



Supporting enterprises, jobs and incomes

A number of policies were also adopted to ensure employment retention in the Saudi labor market. During the same month, the Saned Program was launched which provides subsidies to businesses for Saudi employees' salaries. The program bears 60% of Saudi employees' salaries for a period of 3 months amounting up to SAR 9bn in COVID-19 affected companies.

This considers the company size, for example if there are less than 5 employees, all salaries will be eligible for full coverage, otherwise up to 70% of salaries will be covered. The Ministry of Human Resources and Social Development (MHRSD) announced that workers and employers can regulate contracts by agreeing on wages to reflect actual working hours or granting them annual/exceptional leave.

In March 2020, the Saudi Arabian Monetary Agency (SAMA) introduced the Private Sector Financing Support Program of SAR 50bn to support SMEs by reducing cash flow fluctuations, supporting working capital, enabling the sector to grow and contributing to economic growth and maintaining employment. Simultaneously, MHRSD announced a SAR 5bn initiative, which included:

- SAR 2bn towards employment.
- SAR 800m supporting training.
- SAR 1.5bn supporting 100,000 new job seekers.
- SAR 1bn wage subsidies for employed Saudis.

Additionally, the Ministry of Human Resources and Social Development (MHRSD), and the Human Resources Development Fund (HRDF) announced a joint initiative to support freelance workers and gig economy workers with a monthly payment of SAR 3,000 for 2 months.

In April 2020 MHRSD, with the General Authority of Awqaf, launched a community fund of SAR 500m to support poor, disabled, prisoners' families and elderly affected by the pandemic.

MHRSD have also identified additional priority initiatives beyond the initial stimulus package during the onset of the crisis. Support areas include financing and enforcing job preservation, facilitating workforce management, supporting the unemployed financially and building new skills and facilitating job transition. Each support area encompasses a range of initiatives, examples

include; regulations on key contractual relationships affected by the COVID-19 pandemic; providing financial support to inactive freelancers; temporarily loosening entitlement criteria for the unemployment benefits and adapting existing training initiatives to new needs related to the COVID-19 crisis.

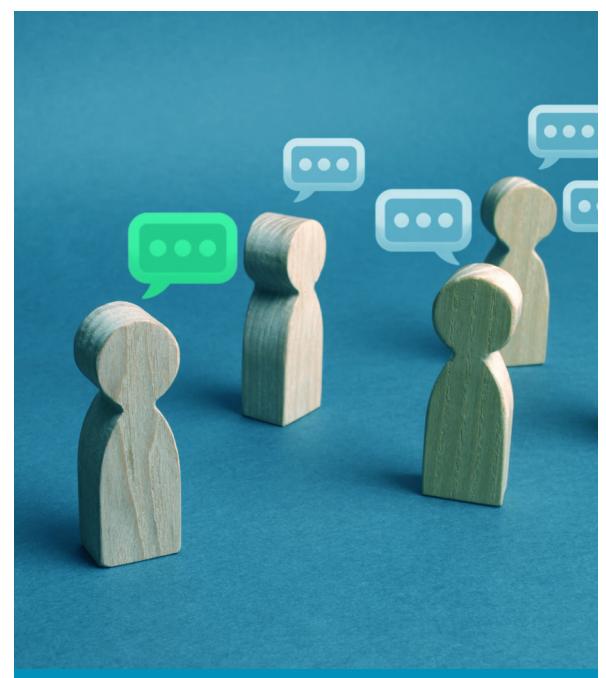


Protecting workers in the workplace

In order to comply with Occupational Safety and Health recommendations, starting from March 2020, businesses who needed staff to be physically present (with the exception of vital sectors) were required to reduce the number of workers to 40%. Both the public and private sector were required to implement work from home measures. MHRSD issued a guide for remote work in the private sector, which was lifted by June 2020. Concurrently, the Ministry of Education closed all educational institutions and requested activation of virtual learning.

Ensuring access to paid leave was also high on the policy agenda. The Ministry of Health (MOH) created an app called 'Sehhaty' for workers who entered the Kingdom after March 13 to apply for sick leave. MOH also announced 2-week sick leave for high risk groups such as pregnant women, people with respiratory and chronic diseases and King Salman issued a statement that all patients infected with COVID-19 in the Kingdom will be treated free of charge.

In terms of expatriate workers, MHRSD published in-depth regulations surrounding the safety of workers who are living in crowded accommodation situations. This includes ensuring all workers are covered by health insurance, adequate spacing in accommodation for workers as well as frequent testing and contact tracing. It also includes regulations employers must adhere to when laying off expatriate workers as well as repatriation regulations for workers returning to their home countries.



Relying on social dialogue for solutions

MOH utilized and communicated key public messages through use of the press, TV and social media outlets. It produced an information document 'Your Ultimate Guide to COVID-19' in 12 languages, for example Hindi, Filipino, Spanish and Russian. The Council of Saudi Chambers held consultations with businesses and produced a range of mitigation recommendations while the National Workers' Committee conducted multi-sectoral awareness campaigns across Saudi Arabia.



Other measures

During the month of Ramadan, a curfew of 9am-5pm was implemented which restricted the movement of people around the Kingdom. Residents were allowed to leave their homes for essential supplies between 9am-5pm, within their own neighborhoods and subject to a geographical zoning system that was introduced.

The Impact of COVID-19 on the Saudi labor market



Prior to the onset of the COVID-19 pandemic, Saudi Arabia saw a significant decrease in Saudi unemployment rates which stood at 11.8% in the first quarter of 2020. The second quarter saw an increase in the Saudi unemployment rate by 3.6% to 15.4% with Saudi females bearing the brunt of the increase. The female

unemployment rate rose by 4.6%, while the male unemployment rate increased by 2.2%⁽²²⁾. As mentioned above, females across the world have been more negatively impacted than males, mainly attributed to unpaid care work largely due to school closures.

Two thirds of Saudi Arabia's population is under the age of 35⁽²³⁾, with over half of jobseekers being between the ages of 15-29 years old. Key challenges within the labor market include youth unemployment, youth not in employment, education, or training (NEET) and high rates of female unemployment particularly among Bachelor's Degree holders. Given that both youth and women are particularly vulnerable to the economic effects of the pandemic, policy-makers should pay particular attention to these groups on its road to economic recovery.

In the private sector, 55% of employees are in jobs where the ability to work has been impacted severely by the pandemic⁽²⁴⁾. Studies have been conducted on the sectoral impact as well as the collection of data from the Saned program, mentioned above, since March 2020. Jadwa Investment's analysis of the impact of COVID-19 on the labor market suggests that the loss of Saudi jobs will remain protected by the various government programs aimed at supporting businesses in retaining employees. For example, the Saned program supported 450,000 beneficiaries in more than 90,000 companies with an investment of 2.4bn SAR. The program was also extended for a further 3 months until the end of September 2020.

In terms of educational level, there is a correlation between educational qualifications and the severity of the impact. For example, it was found that employees with a high school diploma or less made up 75% of the severely impacted occupations of which 20% are in essential occupations. Conversely, employees with university level qualifications were least impacted by the pandemic with over half of them in occupations where the ability to work was minimally impacted⁽²⁵⁾.

In the first quarter of 2020, there were 10.4m expatriate workers in Saudi Arabia, many of whom have been acutely affected by the impact of COVID-19. It is estimated that around 1.2 million expatriate workers will leave the Saudi Arabian labor market by the end of 2020, with sectors such as accommodation and food services and administrative and support services amongst those experiencing the highest losses. The Awdah program, which helps workers repatriate to their home countries during the pandemic, received 178,000 applications from expatriate workers between April and June 2020.

Across the world, Small and Medium Sized Enterprises (SMEs) are expected to be severely affected by the economic impact of the COVID-19 pandemic due to country-wide lockdowns, including in Saudi Arabia. Limited cash reserve is a reality for many SMEs which means that they are more likely to reduce their employee numbers due to the high costs incurred through salary payments, and other associated costs. GASTAT data shows that Saudi employees between the ages of 26-35 years make up around 41% of employees in SMEs, suggesting that this age group may experience disproportionately high job losses in comparison to other age groups.

To alleviate the impact on SMEs, the Saudi government launched three specific initiatives:

1. The Saudi Arabian Monetary Agency (SAMA) introduced a 50 billion SAR stimulus package, which allocated 30 billion SAR towards SME support for banks and financial institutions to postpone bank payments for a period of up to 6 months, provision of 13.2 billion SAR of bank loans to SMEs, as well as allocating 6 billion SAR towards loan guarantees.

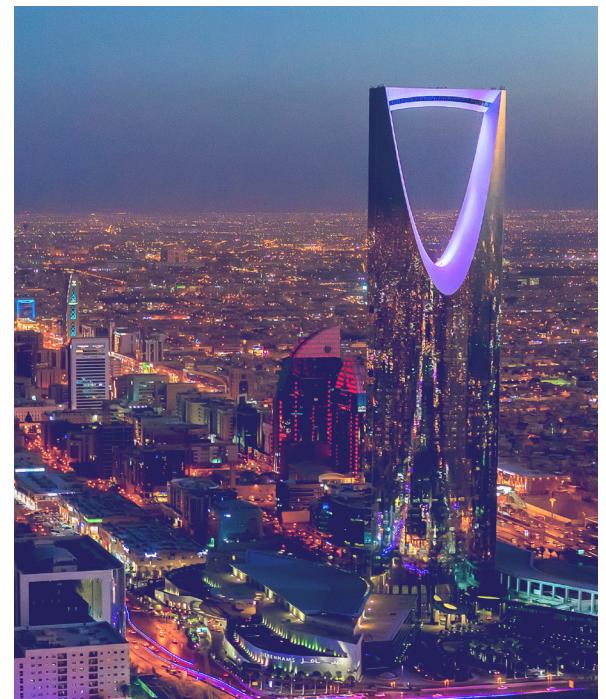
2. SAMA, in partnership with Kafalah, launched a loan guarantee program which guarantees 95% of finance for SMEs. They will be exempt from fees and SAMA will cover the cost of the loan to Kafalah.

3. Saudi Development Fund provided 12 billion SAR of direct finance to support SMEs with a focus on micro-enterprises.

While we can see the initial effects of the COVID-19 pandemic on the Saudi labor market, youth and female unemployment rates should be monitored in the near future to enable policy-makers in developing policy responses quickly and effectively.



Future outlooks



In June 2020, the OECD Economic Outlook predicted two possible scenarios. The “**double-hit scenario**” projected a second wave of infections that would result in a second round of lockdowns, leading to a drop of 7.6% in world economic output⁽²⁶⁾. This compares with the “single-hit scenario”, which avoids a second wave and, instead, experiences a 6% drop in economic activity. The ILO provided three possible projections for global labor markets in the second half of 2020.

The “**baseline scenario**”, which uses GDP projections from the OECD and the Economist Intelligence Unit, predicts a rebound in economic activity, with a decline in the loss of working hours in quarter four compared with quarter two of 2020⁽²⁷⁾. Although OECD projected that most workplace restrictions would be lifted and consumption and investment would return to an “appreciable level”, ILO projections show that labor markets will be far from recovered by the end of the year.

The “**pessimistic scenario**” is underpinned by the prediction that a second wave of the virus would result in another round of workplace closures, resulting in 340 million full-time equivalent (FTE) jobs lost by the end of 2020, when compared to the end of 2019.

The “**optimistic scenario**” predicts the loss of working hours, equivalent to 34 million FTE jobs, by the end of quarter four of 2020. This scenario is already looking unlikely for many countries, which are already commencing a second phase of restrictions as a result of a second wave of infections. What is clear is that labor market recovery will show significant regional and domestic variation in the short-term, as a result of variances in early preventative measures and ensuing laws in place to curb the spread of infection, such as the wearing of masks in indoor and outdoor public spaces. The OECD’s Interim Report of September 2020 shows a level of economic recovery since the beginning of the year. However, investment remains relatively subdued, recovery remains uneven amongst countries, and manufacturing and trade remain significantly impacted. One of the main keys to recovery will be the extent to which demand can be boosted through government aid for jobs and businesses.

As people around the globe were suddenly required to stay inside, the world of work experienced its largest experiment on the expansion of remote working. It is still not entirely obvious whether this new trend will continue post-pandemic, or to what extent. During the earlier months of the year, some companies

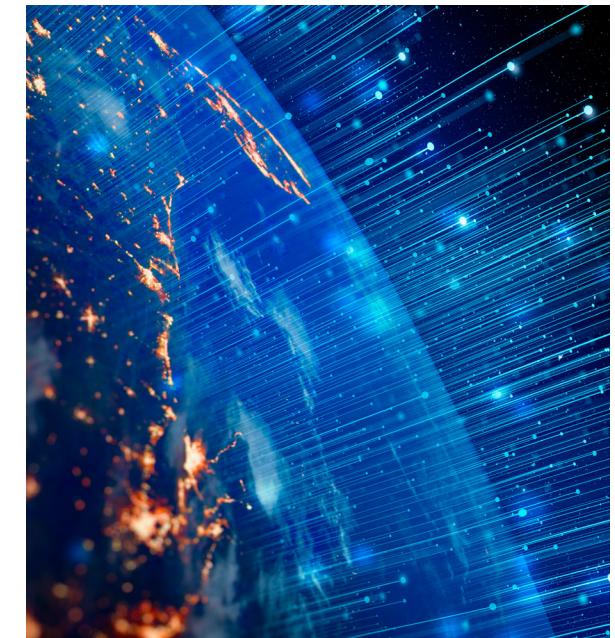
announced that ‘working from home’ would continue to be a lasting element of their operational models, for instance with Twitter telling its employees they can work from home “forever” if they want⁽²⁸⁾. According to Gartner, 74% of CFOs who were surveyed denoted that they plan on keeping part of their workforce permanently remote, even after the pandemic⁽²⁹⁾.

For many enterprises, the longevity of remote working will depend on a number of factors. Most significantly, the question of productivity has been considered in depth. A Boston Consulting Group (BCG) study has shown a consistency or improvement in workers’ perceived productivity⁽³⁰⁾. Interestingly, 51% of respondents reported that productivity was maintained or improved on collaborative tasks. The area of collaboration and teamwork is commonly discussed with respect to the challenges created by remote work. Four factors were found to correlate with perceptions of productivity in collaborative tasks. These were social connectivity, mental health, physical health, and workplace tools⁽³¹⁾. For companies that will continue to have elements of remote work, it will be important to establish how social interaction will be incorporated more effectively in order to maintain productivity levels and the mental health of employees. These global impacts are of relevance and importance to Saudi Arabia and have been incorporated within Saudi government responses to mitigate the impact of COVID-19 on both the labor market and wider society.

The pandemic has also affected other dynamics within global labor markets, with effects that are likely to persist for some time. A key challenge during the pandemic is the disruption caused by COVID-19 on global supply chains, and its relationship with respective industries. Global organizations, such as GlaxoSmithKline, have reflected on the need to be cautious about single or double sourcing key raw materials, which proved to be problematic for many enterprises when countries closed borders⁽³²⁾. Furthermore, as the shifts in the world of work are

likely to have long-lasting impacts, so too will the evolution of the needs of the labor market. The digitization of government services, within and outside of the labor market, proved to be one of the most important aspects in resuming services during the pandemic and for the future recovery, but might have an observable impact on public sector employment. As a consumer of goods and services from global sources, and with a sizeable proportion of public sector employment, these are issues which will continue to create challenges for Saudi Arabia and which will form part of the ongoing deliberations, considerations and decisions within the country.

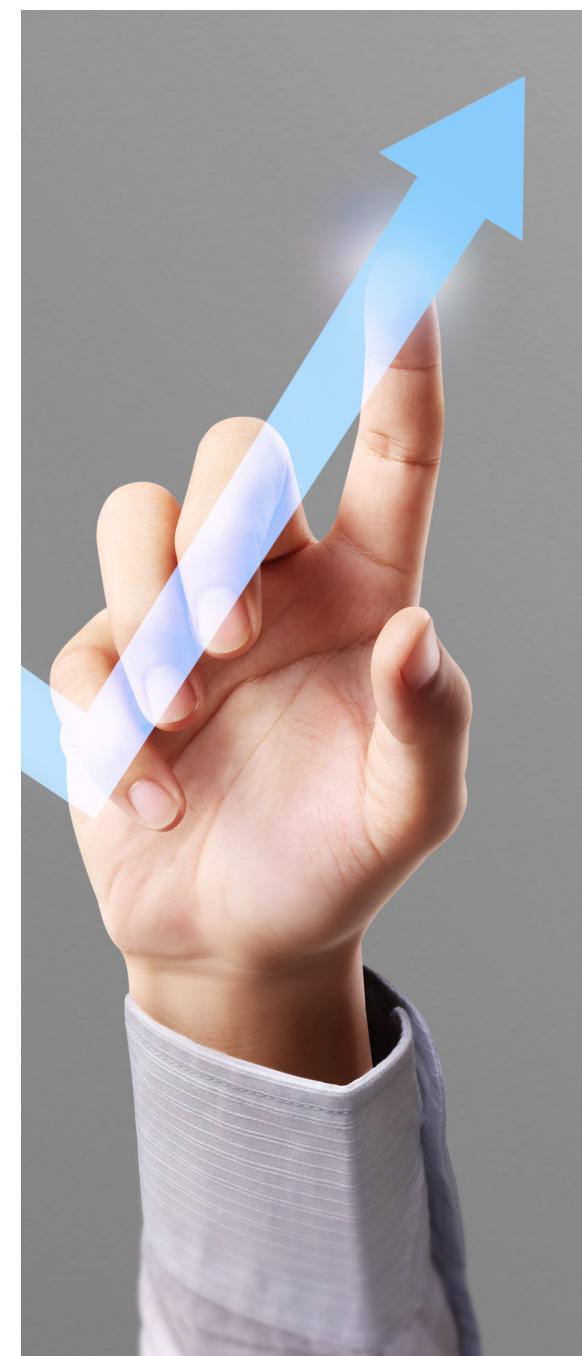
This also has implications for the future of skills. It is proposed that “futures literacy”, which is the ability to better imagine and make sense of the future, can be core to how we may excel in a constantly changing world⁽³³⁾. Other skills depicted by the World Economic Forum include systems thinking, anticipation and strategic foresight, all of which connote large degrees of agility and being future-inclined⁽³⁴⁾. It is also widely shared that harnessing the benefits of technology, both in the ability to operate in a fully digital environment and to use digital and technological tools such as coding, big data and



AI, will be in high demand⁽³⁵⁾. Saudi Arabia has already introduced a significant focus, with additional investment, in the Future of Work. This proactive approach will help mitigate the impact of COVID-19 in the medium and the long term.

In Saudi Arabia, numerous measures were implemented in an attempt to slow down the spread of COVID-19. This caused many challenges due to business uncertainty, disrupted supply chains, lockdowns and curfews. The private sector was impacted significantly which in turn also had an effect on employment. It is also predicted that new graduates entering the labor market may lead to higher participation and jobseeker rates. Given that youth employment is a high priority for the government, targeted socio-economic policy responses towards youth are required as well as social protection programs such as unemployment support to cushion the impact of the pandemic on young people⁽³⁶⁾.

While the Saudi unemployment rate has increased by 3.6% since Q1 of 2020, the immediate policy responses introduced nationally have undoubtedly helped to mitigate the negative consequences of the COVID-19 pandemic with countries across the globe reporting higher increases, for example the United States with over 10%. It is likely that the near future will see the launching of new initiatives to improve labor market conditions, which may include training programs for new labor market entrants. These initiatives as well as others under the Ministry of Human Resources and Social Development are expected to help alleviate the unemployment rate as well as support economic recovery⁽³⁷⁾.



Conclusion

At the time of writing, we are witnessing a second wave of COVID-19 cases in many parts of the world, while in other cases, many countries continue to grapple with the reality of the initial wave. Lessons have certainly been learned between the early outbreak of COVID-19, the experience of dealing with the initial impact, the effectiveness of specific measures and the reality of easing restrictions in many countries.

Policy makers across the government in Saudi Arabia continue to work with health professionals to manage and mitigate the impact of COVID-19 on economies, labor markets, societies and families. This requires to continue to function in an agile and flexible manner in order to deal effectively with the continuing impact of COVID-19, achieving the balance between economic recovery, meeting the demands of health services and protecting the health and the lives of the Saudi and the wider global population.

In the national context, and within a period of unprecedented global challenge, Saudi Arabia has managed to maintain a steady reduction in confirmed numbers of COVID-19 cases, and based on previous decisions and initiatives in Saudi Arabia, we anticipate that the Kingdom is prepared to plan and take proactive action, while also maintaining the ability to react quickly and effectively to all future circumstances which result from COVID-19.

