



WOMEN'S CAREERS IN THE GCC

THE CEO AGENDA





REPORT BY:

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INTRODUCTION



COUNTRIES within the Gulf Cooperation Council (GCC) have made significant strides over recent years in increasing the participation of women in tertiary education and in the workforce. Yet the number of women advancing to senior executive and board levels within organisations in the GCC remains low. The bottom-line business case for greater levels of board diversity is increasingly well-researched and understood. Good corporate governance encompasses a rigorous system spanning all aspects of accountability and good business practices, and

it's also very much about the people within those systems. It's about building a competitive, high-performance organisation in which the culture cultivates the best strategic decisions, and that means having the right mix of experience, skills and perspectives on the leadership team, including a gender balance.

The Pearl Initiative research programme on “Women’s Careers in the GCC: The CEO Agenda” is of particular relevance and interest in the light of several GCC governments’ efforts to increase the level of participation of women in the workforce, in senior positions and on boards of directors. This Report is the culmination of ten months of research, analysis and data gathering from over 600 senior women across the GCC region. It aims to inform business leaders about the important aspects of attracting, retaining and developing more women into senior positions in the GCC Region, and thereby creating a larger pool of Board-ready women.

Our research clearly shows that the majority of business women in the GCC have high aspirations and ambitions. This Report is aimed at the CEO agenda, because it is CEOs who have the business incentive and the influence to drive the changes that can strengthen the pipeline of female talent through to senior levels, and thereby build more competitive and well-governed organisations across the Gulf Region.

I would like to thank the organisations who have particularly helped lead and support this research programme, both financially and with their valuable time – Sharjah Business Women Council, United Nations Global Compact, PwC, GE, Alwaleed bin Talal Foundation and Tamer Group.

The findings and recommendations in this Report are aligned with the Women Empowerment Principles, an initiative co-developed by the United Nations Global Compact and UN Women, which the Pearl Initiative is proud to support in the GCC Region.

I would also like to extend a special thank you to all the women across the GCC region who participated in the focus groups and contributed their views through the extensive survey.

It is our belief that good corporate governance, based on values of accountability, transparency and diversity, makes sound business sense and is fundamental to fostering future competitive economic growth, spurring job creation and enhancing sustainable development across the Gulf Region and beyond.

Imelda Dunlop
Executive Director
Pearl Initiative

EXECUTIVE SUMMARY

This report sets out the findings of an extensive survey of women in managerial and senior leadership roles across the Gulf Cooperation Council (“GCC”). Research by the United Nations and other international bodies such as the World Economic Forum has shown that the GCC is one of the most challenging regions in the world for ambitious women. Fewer women enter the workforce in the GCC, and fewer make it to senior positions than in almost any developed region, because too many women opt out of their career before they get that far. The key findings of the research are:

- Women in the GCC are ambitious and over half of the survey respondents see themselves taking senior roles; they are driven more by personal growth and recognition rather than pay or power.
- But only 45% find it feasible to achieve a positive work/life balance, and combine a high-power career with a family.
- Even though three quarters of respondents feel that their families are supportive of their education and career, they are still hampered by traditional role models, and there is little evidence to suggest social attitudes are changing.
- 76% of respondents believe that within the workplace the most important direct influence on women’s careers is their line manager.
- Nearly 80% of the respondents feel that simply being a woman puts them at a disadvantage at work, and this was even more marked in Bahrain and the UAE. This creates a glass ceiling in the workplace, with a number of companies in the region still showing conscious or unconscious bias which impede women’s career progression.
- As a result, around half of the women opt out by taking career breaks, while others opt out by starting their own businesses or becoming self-employed, where they can have more control about how and when they work. But many – too many – opt out by leaving the workforce entirely, also referred to as the phenomenon of the ‘leaking pipeline’.

Women in the GCC have the drive and talent they need to succeed at the highest level, and they are willing to work hard to get there. In fact, women represent an enormous untapped resource for organisations in the GCC. But there are significant barriers that are hindering the full utilisation of this pool of talent. If we are to address the 'leaking pipeline', companies need to support and nurture their high-potential women, and create a more equal and positive working culture. This, in turn, will open up a significant new source of skills, energy and commitment for the future, which will help build success, profitability and competitive advantage at the company and the country level.

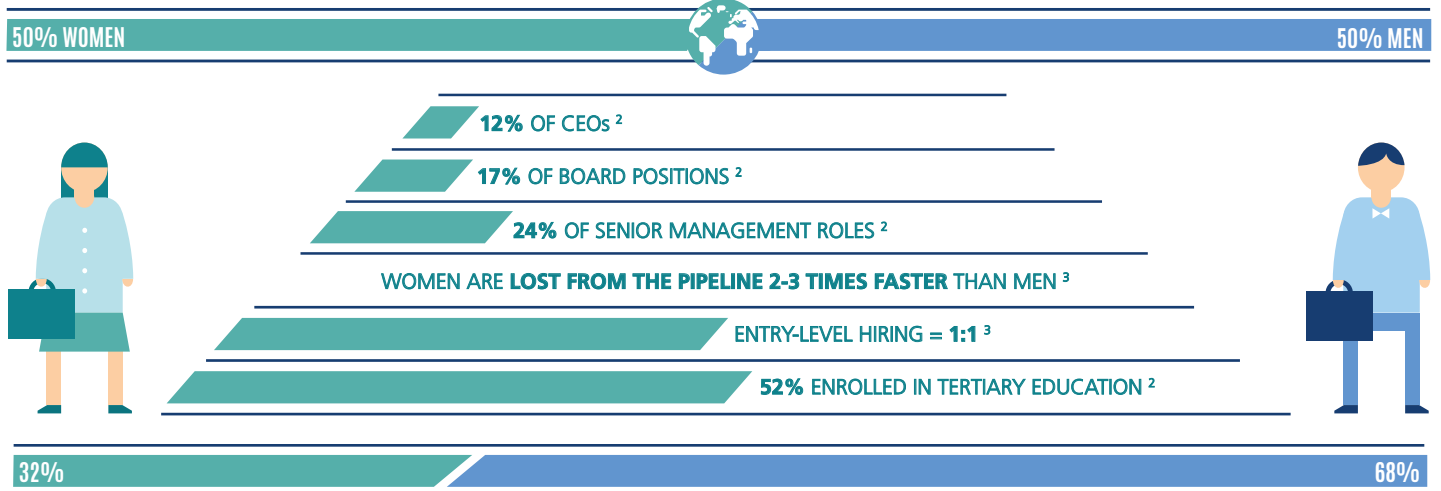
BASED ON THE FINDINGS SUMMARISED ABOVE, WE SET OUT FIVE RECOMMENDATIONS FOR CEOs:

1. **Improve work/life balance:** flexible working is central to this, with performance appraisal based on achievements rather than time spent in the office.
2. **Create a balanced culture:** CEOs can play a vital role by visibly supporting women at work. The key is to ensure more women make it through middle management to more senior positions, and the 'tone in the middle' will take its cue from the 'tone at the top'.
3. **Invest in building career paths,** not only more support and mentoring for talented women, but more diversity training for men.
4. **Adopt HR policies that ensure equity in the workplace,** including policies on recruitment, pay and promotion, and targets for numbers of women at each managerial level.
5. **Be an advocate in the wider community,** by using their own public profile to raise awareness of the value of a more diverse workplace, and the contribution talented women can make.



ADDRESSING THE LEAKING PIPELINE: GLOBAL & LOCAL EVIDENCE

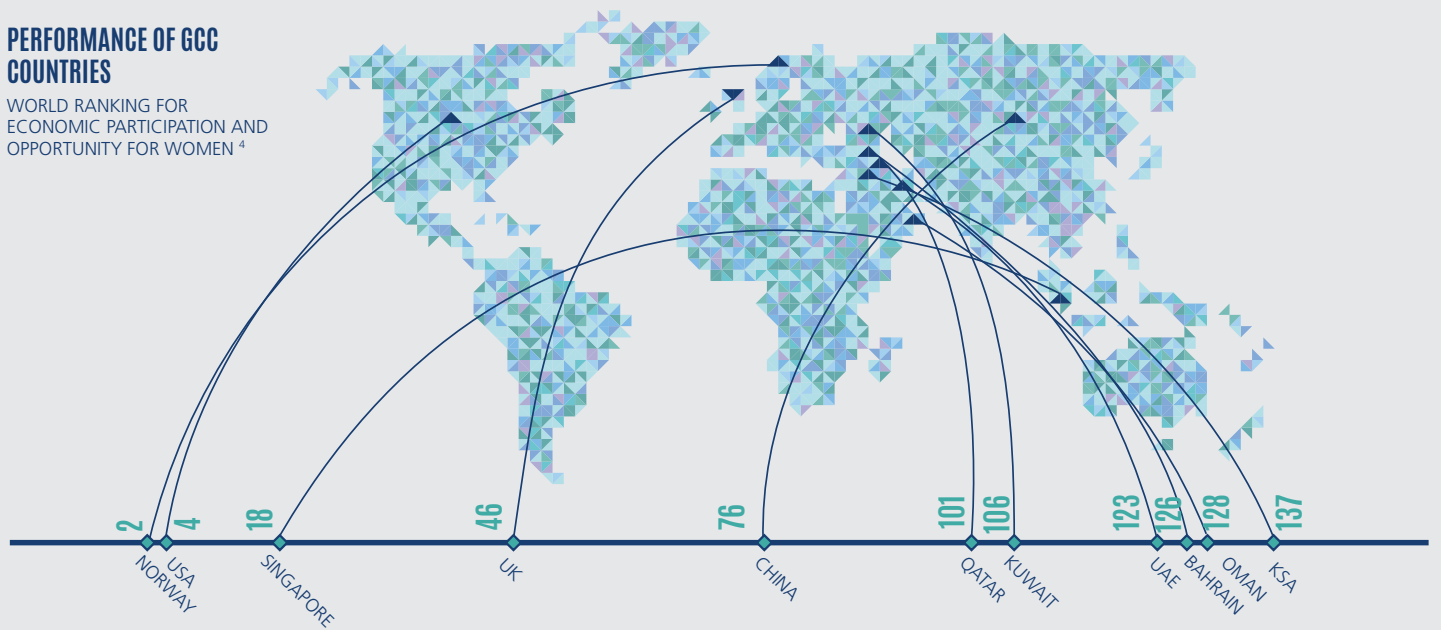
GENDER DISTRIBUTION IN WORLD POPULATION ¹



GENDER DISTRIBUTION IN GLOBAL WORKFORCE ²

PERFORMANCE OF GCC COUNTRIES

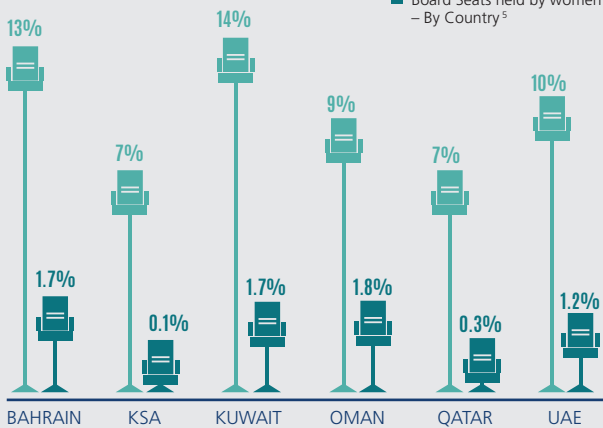
WORLD RANKING FOR ECONOMIC PARTICIPATION AND OPPORTUNITY FOR WOMEN ⁴



WOMEN IN SENIOR ROLES IN THE GCC

■ Legislators, Senior Officials & Manager roles held by women – By Country ⁴

■ Board Seats held by women – By Country ⁵

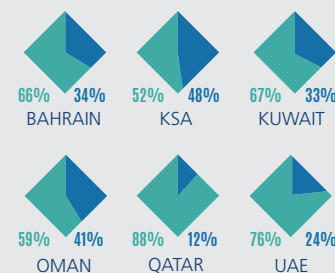


EVIDENCE FOR THE GENDER GAP

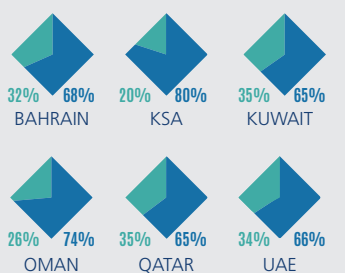
■ Female

■ Male

ENROLLMENT IN TERTIARY EDUCATION (BY GENDER) ⁴



LABOUR FORCE PARTICIPATION (BY GENDER) ⁴



Female enrollment ratio in tertiary education exceeds that of males

Male labour participation ratio largely exceeds that of females

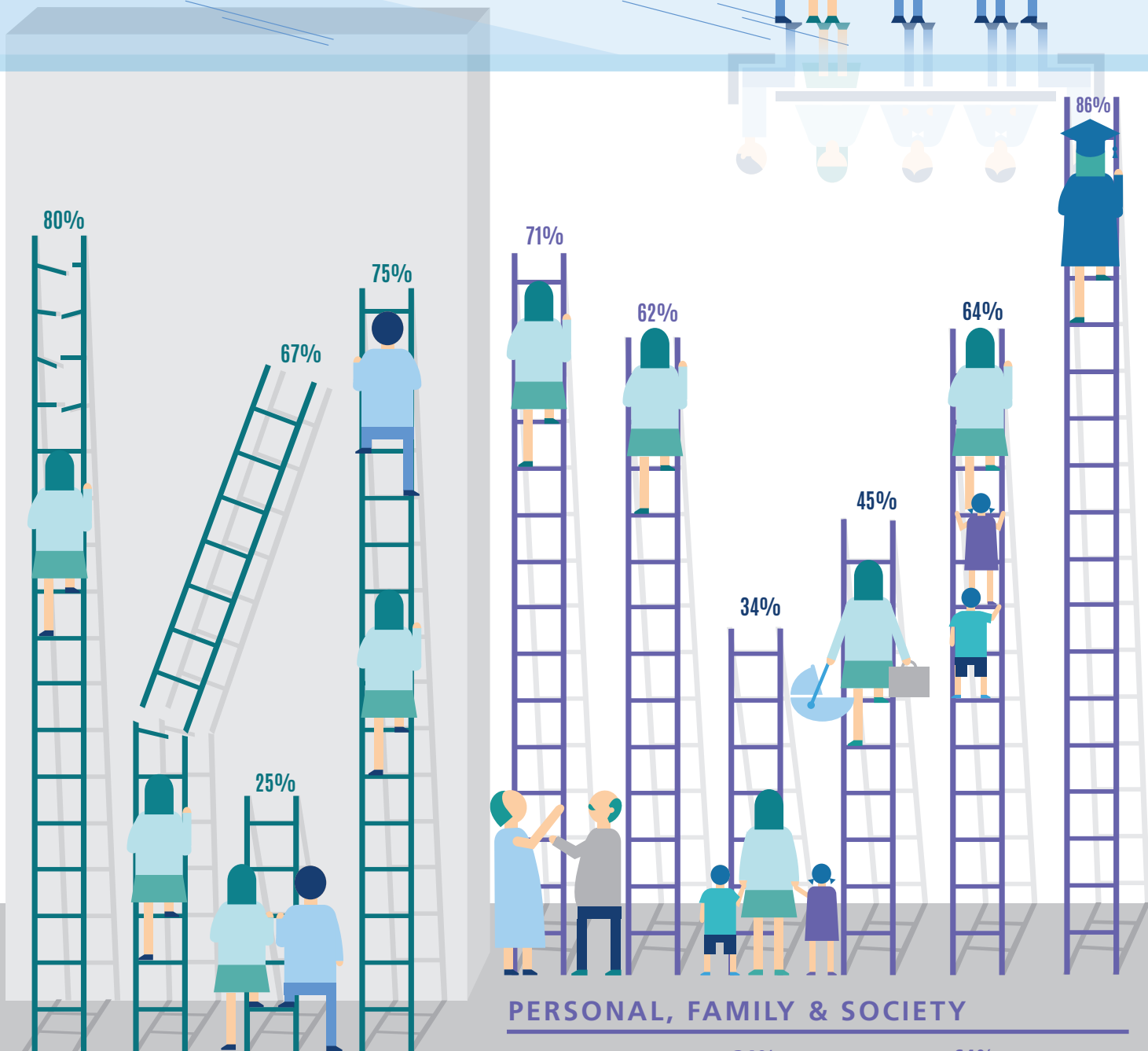
Sources:

¹ World Population Prospects, UNFPA, 2013
² Grant Thornton International business report, 2014

³ The leaking pipeline: Where are our female leaders, Gender Advisory Council, PwC, 2008
⁴ The Gender Gap Report 2014, World Economic Forum & United Nations Statistics Division
⁵ <http://www.catalyst.org/knowledge/women-boards>

ADDRESSING THE LEAKING PIPELINE: WHO AND WHY

WOMEN IN THE GCC ASPIRE TO SENIOR POSITIONS YET ONLY A FEW BREAK THROUGH THE GLASS CEILING



WORKPLACE

80% feel that simply **being a woman** put them at a **disadvantage** at work

25% consider they are **treated equally**

67% believe that **gender bias** has negatively impacted their career progression

75% believe they **do not advance as quickly as men**

PERSONAL, FAMILY & SOCIETY

71% agree that **their family** has been vital for their career progression

34% wish to not sacrifice other aspects of life such as **family & children**

64% perceive that society thinks it's acceptable for **married women with children to work**

62% aspire to a **management role** within the next seven years

45% believe that a good **work/life balance** is feasible

86% believe that **education** has been vital for their career progression

ADDRESSING THE LEAKING PIPELINE: WHAT CAN BE DONE

THERE IS A STRONG BUSINESS CASE TO RETAIN AND NURTURE WOMEN IN SENIOR LEADERSHIP ROLES



LARGER
TALENT POOL



BETTER
GOVERNANCE



BETTER FINANCIAL
PERFORMANCE



Only **27%** of the women surveyed agree that the leadership in their own organisation is committed to having women in senior roles



Over **50%** of the women surveyed aim at a senior or board level position

THEREFORE IT'S CLEARLY UP TO ORGANISATIONS TO ACTIVELY PROMOTE FEMALE TALENT

RECOMMENDATIONS FOR COMPANIES AND OTHER ORGANIZATIONS



1.

IMPROVE WORK/LIFE BALANCE



2.

CREATE A BALANCED CORPORATE CULTURE



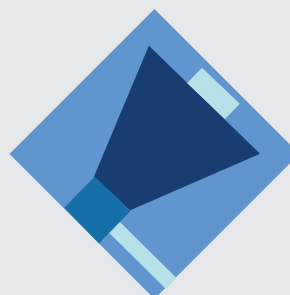
3.

INVEST IN BUILDING CAREER PATHS



4.

ADOPT HR POLICIES THAT ENSURE EQUITY



5.

BE AN ADVOCATE IN THE WIDER COMMUNITY

THE 'LEAKING PIPELINE': WHY WOMEN WALK AWAY

IT'S one of the truisms of modern business: a more diverse organisation is also a more creative one. And research has proved that when it comes to the inclusion of women at senior levels, a more diverse organisation is also better governed, more competitive, and more profitable.

A 2010 UN report found that having women on the board leads to better decision-making, and better board governance¹, and such boards have also been shown to be more innovative and more likely to develop ground-breaking strategies.² Likewise, having a better gender balance at senior levels leads to a richer understanding of a company's market and customers, which can enhance its competitive advantage. As for financial performance, McKinsey research has shown that, across the world, corporations with the highest proportions of women outperform by an average of 47% on return on equity and 55% on earnings before interest and tax.³

In an ever more fluid, disruptive and competitive business world, where innovation is imperative, and talent at a premium, which CEO would turn down an advantage like that?

And yet, women are either failing to make it to the most senior positions, or are opting out of their careers before they get there. There's been a huge improvement in gender balance at university level, with 52% of students in tertiary education now female, and in mature economies the numbers of men and women going into professional jobs after college are now almost even. But from then on the numbers decline dramatically. Women make up only 24% of senior business roles, 17% of board positions, and 12% of the CEO population.⁴ A PwC study from 2008 found that women were leaving the workforce at two to three times the rate of men, and – even more worryingly – this 'leakage' was occurring after they had done the hard work of establishing themselves and reaching their first management role.⁵ That could well be because the problem is a vicious circle: with so many women leaving the workforce there are fewer of them to fill the middle management roles that will give them the springboard they need to break through into senior positions. This could be where the heart of the problem lies.

So why is this leakage happening, and what can be done about it?

1. The World's Women 2010, Department of Economic and Social Affairs, United Nations
2. Women and Minorities on Fortune 100 boards, Alliance for Board Diversity 2008
3. Women Matter, McKinsey, 2013
4. Grant Thornton International Business Report, Women in Business: From Classroom to Board Room, 2014
5. The Leaking Pipeline: Where are our female leaders, Gender Advisory Council, PwC, 2008
6. Cracking the Code, KPMG, 2014
7. The World's Women 2010, Department of Economic & Social Affairs, United Nations
8. The Role of Masculinity/ Femininity: Values and occupational value affordance in shaping young men's and women's occupational choices, Erica S. Weisgram, Lisa M. Dinella & Megan Fulcher
9. The Opt out Revolution, Lisa Belkin, New York Times article, October 2003

Despite years of legislation in markets like Europe and North America, there is still a lack of genuine equal career opportunities for women across the world: this is a global phenomenon. In the UK, for example, a man is still more than four times more likely to reach an executive committee position than a woman.⁶ And despite the emphasis most forward-looking companies now place on work/life balance, women still bear the brunt of family and caring responsibilities, and do most of the housework.⁷

Faced with the choice of home or career, more women still choose the former, and men the latter: when jobs are characterized as challenging, influential, and involving high levels of responsibility, they appeal more to men, while women tend to prefer roles that allow them to spend time with their family.⁸ And this goes all the way to the top: Fortune magazine found that at least 20 of the 108 women who have appeared on their 'most powerful' lists have chosen to leave high-flying posts for family reasons.⁹

None of this will come as much of a surprise; what is disheartening, however, is that the situation has barely changed at all in the past decade.

“OVER THE LAST QUARTER-CENTURY, A GROWING NUMBER OF WOMEN HAVE ASPIRED TO LEADERSHIP ON THE SAME TERMS AS MEN; THEY HAVE MADE THE SAME CHOICES AS THEIR MALE COUNTERPARTS BUT CONFRONT AN ADDITIONAL SET OF OBSTACLES.”

Women and Leadership: The State of Play
Deborah L. Rhode and Barbara Kellerman, 2006

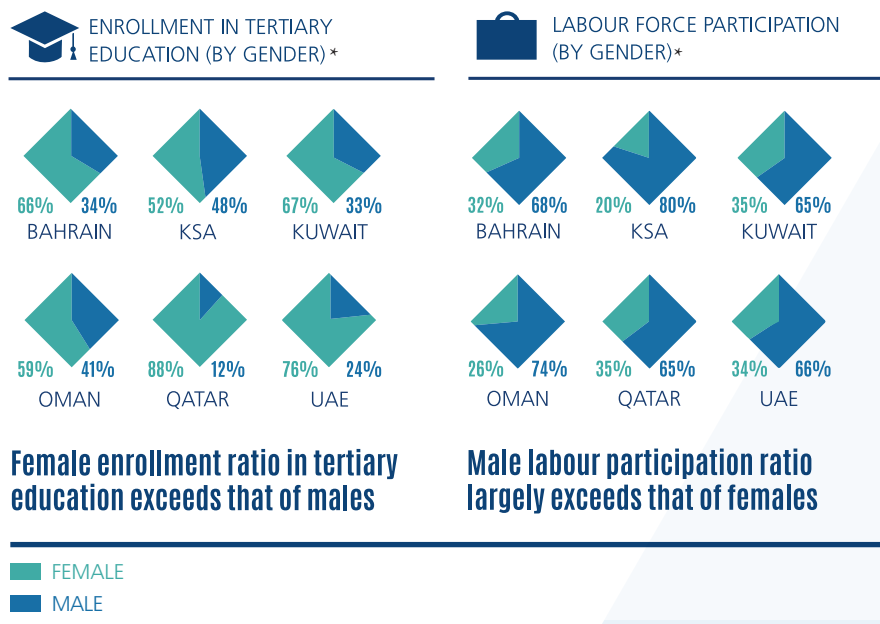
So what about the GCC? What is the state of play in the region, and are organisations making better or worse progress than the rest of the world?

IMPROVING SITUATION IN THE GCC

DESPITE the positive work being done by bodies like the Shura Council in Saudi Arabia, and the political support for women in the workforce in markets like the UAE, the Middle East as a whole still performs relatively poorly in this area. In the World Economic Forum's 2014 world ranking for 'economic participation and opportunity' for women, Qatar fares best at 101, followed by Kuwait (106), the UAE (123), Bahrain (126), Oman (128) and Saudi Arabia (137). This compares to the US (6), Singapore (12), the UK (35) and China (62).¹⁰

10. The Gender Gap Report 2014, World Economic Forum
 11. World Bank Data, <http://data.worldbank.org/indicator/SL.TLF.CACT.FE.ZS/countries> (accessed on 30 December 2014)
 12. Progress in female education and employment in the United Arab Emirates towards Millennium Development Goal (3): gender equality, Linzi J. Kemp, American University of Sharjah, 2012
 13. Family Matters – Governance Practices in GCC Family Firms, Pearl Initiative and PWC 2013

FIGURE 1 EVIDENCE FOR THE GENDER GAP

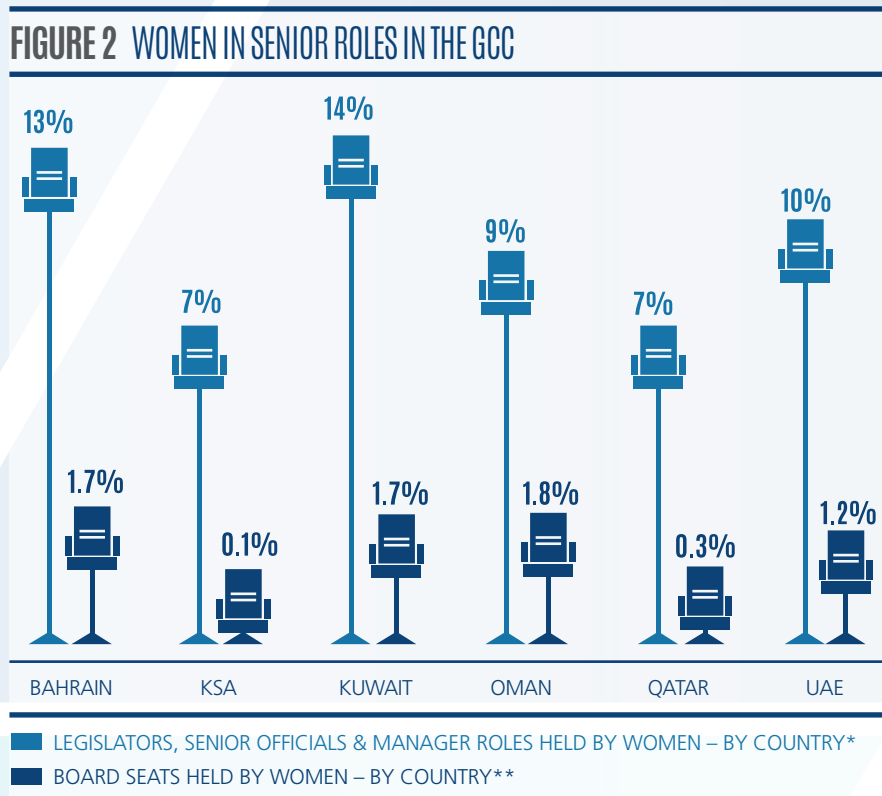


* The Gender Gap Report 2014, World Economic Forum & United Nations Statistics Division

The same underlying pattern seen in other developed markets is also found in the GCC: the numbers of women enrolling in university courses are either the same or even higher than men, but their participation in the workforce thereafter drops off sharply, especially around mid-career (Figure 1) – the point when many women leave to have their first child: The problem is that so few return thereafter, which is why they make up only 38% of the workforce in the GCC, and 21% in the Middle East and North Africa region as a whole. However, the UAE, Qatar and Kuwait do show more balanced figures in this respect. In the UAE, for example, there is social and governmental support to increase the number of women in both tertiary education and the workplace, but as research from the American University of Sharjah has shown, more progress has been made on the former goal than the latter.¹²

The disparity with developed markets around the world is even more marked at board level: directorships held by women are still under 2% in the region, as

Figure 2 shows. Women do slightly better in more junior managerial roles, and in legislative and government positions, where the average participation rate is 7 to 14%:



* The Gender Gap Report 2014, World Economic Forum & United Nations Statistics Division
 ** <http://www.catalyst.org/knowledge/women-boards>

Family firms are a slightly different case. Previous research by the Pearl Initiative showed that 32% of family firms in the GCC had at least one female family member on their boards¹³; mostly as non-executive directors. This is significant, given the importance and influence of family firms in the GCC. However, only 4% of family firms have women on their boards who are not family members, which suggests that family membership is the real criterion for their inclusion, rather than a value for the contribution women can make in their own right. Nor will this help build a strong pipeline of women able to lead companies which are not their own family firms.

This shows that, even though a lot of progress has been made, it still remains difficult for an ambitious woman to attain a senior executive position in the GCC.

We will now look at why this problem is proving so intractable, and what can be done about it.

OUR FINDINGS: WHO AND WHY

AS we described in the introduction to this report, we surveyed over 600 businesswomen across the Middle East, and conducted four in-depth focus groups and numerous informal interviews to supplement the survey findings with richer insights from more qualitative responses. We also undertook our own desktop research on specific topics (refer to the Research Methodology on page 36).

In carrying out the research our aim was to explore **who, why and what**. Who the women in senior roles are in the region - their perspectives and ambitions; why so few women break through into senior management, and where the barriers (and enablers) are; and what companies and other organisations can do to increase the number of senior women in their teams, and develop and retain them.

WHO: WHAT WOMEN WANT

WOMEN in the GCC are ambitious and value their careers. They are confident that they have a significant contribution to make in the workplace, and they don't believe having a family should be an impediment.

9 out of 10 women we surveyed attach a high importance to their career, and this is true across the whole region, with numbers as high as 95% in Bahrain and 93% in Saudi Arabia. Significantly, there is no difference here between women who are single or married, and those with and without children. They are also ambitious, with 62% aspiring to a management role within the next seven years, and over half aiming at a senior or board level position. Again, marital status and motherhood make no difference to these responses. The results across the region are also remarkably similar, with only Kuwait showing a noticeably lower level of aspiration to board level roles, but this may be explained by the much higher number of Kuwaiti respondents who want to be self-employed rather than pursue a corporate career.

The numbers are also very high for the contribution women believe they can make, with an average of 77% considering that business in general would benefit from having more women at senior level.

“25,000 WOMEN ARE GOING THROUGH THE KING ABDULLA SCHOLARSHIP PROGRAMME. AS THEY ENTER THE WORKFORCE AND PROGRESS, THIS WILL HAVE A HUGE IMPACT.”

Feedback from Riyadh focus group

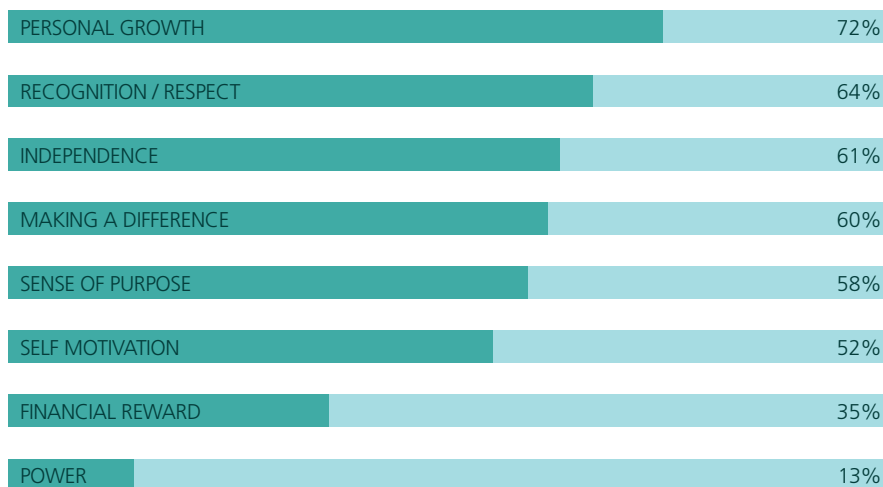
WHY: WHAT INSPIRES WOMEN, AND WHAT HOLDS THEM BACK

WOMEN in the GCC region are looking to achieve personal growth, recognition and independence, and draw primarily on their own inner strengths to achieve it. Their families are, in many cases, both their strongest supporters, and their greatest impediments.

'ME AND MYSELF': PERSONAL GROWTH AND PROFESSIONAL FULFILMENT

AS Figure 3 shows, financial reward ranks fairly low in the list of factors that inspire women in their careers. Women in the region see their professional roles as a way of achieving personal growth, respect and independence, as well as giving them a sense of purpose and the opportunity to make a difference.

FIGURE 3 INTRINSIC MOTIVATORS POSITIVELY IMPACTING WOMEN'S CAREERS



Respondents could select more than one answer

What is also obvious from these figures is how self-reliant most senior women in the region are – it's their own drive, self-motivation and willingness to work hard which is at the root of their success, rather than any support they may have received from their employer or an influential individual like a mentor (only 14% cited a mentor as having significantly assisted them).

“MY OWN DETERMINATION IS THE NUMBER ONE FACTOR.”

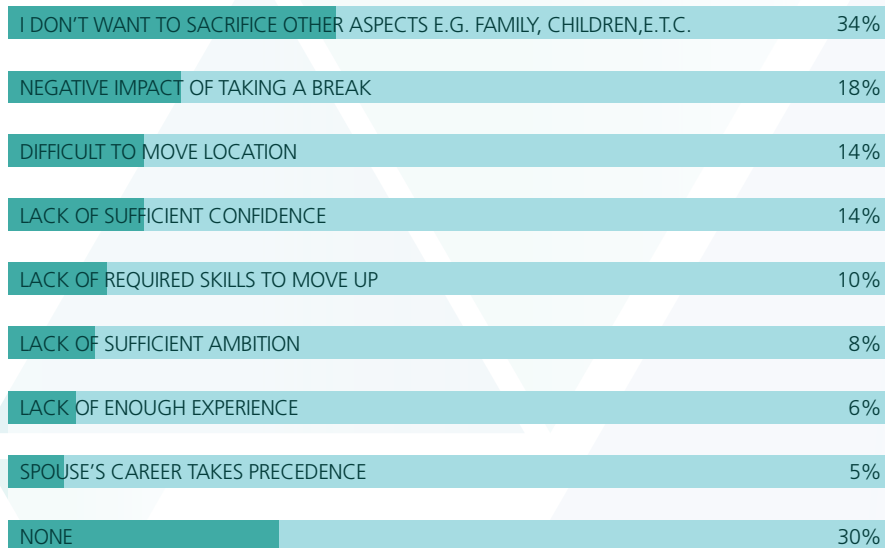
Saudi respondent

“ME AND MYSELF ARE THE BIGGEST POSITIVE INFLUENCE ON MY CAREER. NOT TO SAY I HAVEN'T BEEN INFLUENCED BY OTHERS AT ALL, BUT I'M THE ONE WHO GOT ME HERE.”

Canadian respondent working in the UAE

This self-reliance has its flipside, however, as many women are also undermined (rightly or wrongly) by a lack of faith in their own abilities, whether this relates to specific skills and experience, or more intangible qualities like confidence and ambition. This came through strongly in our focus groups as well – in Bahrain, for example, the participants felt that women's lack of confidence starts at a very young age, and this can be hard to overcome, however much experience a woman later gains. The UAE focus group felt that women were far more likely to be influenced by other people's opinions than men and the issue was most pronounced in Saudi Arabia, where genders are segregated from a young age. As one participant in the Bahrain focus group said, “gender equality has to start at home”.

FIGURE 4 PERSONAL OBSTACLES TO CAREER ASPIRATIONS



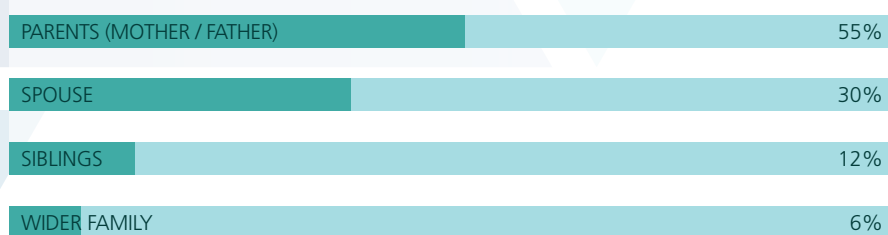
Respondents could select more than one answer

It's clear that some women in the region may be under-achieving or leaving the workforce, because they are hampered by their own doubts, but as Figure 4 shows, by far the single most important factor holding women back is the potential impact of their career on family life. And this is a theme which runs through almost every aspect of the survey: it is the family – both positively and negatively – that determines the degree of a woman's professional success.

THE 'FAMILY FACTOR': HELP AND HINDRANCE

FOR career women in the GCC region, professional relationships are far less important than personal ones. As Figure 5 shows, 55% of the survey respondents cite parents as instrumental in their career advancement.

FIGURE 5 POSITIVE INFLUENCES FROM WITHIN THE FAMILY ON CAREER SUCCESS



Respondents could select more than one answer

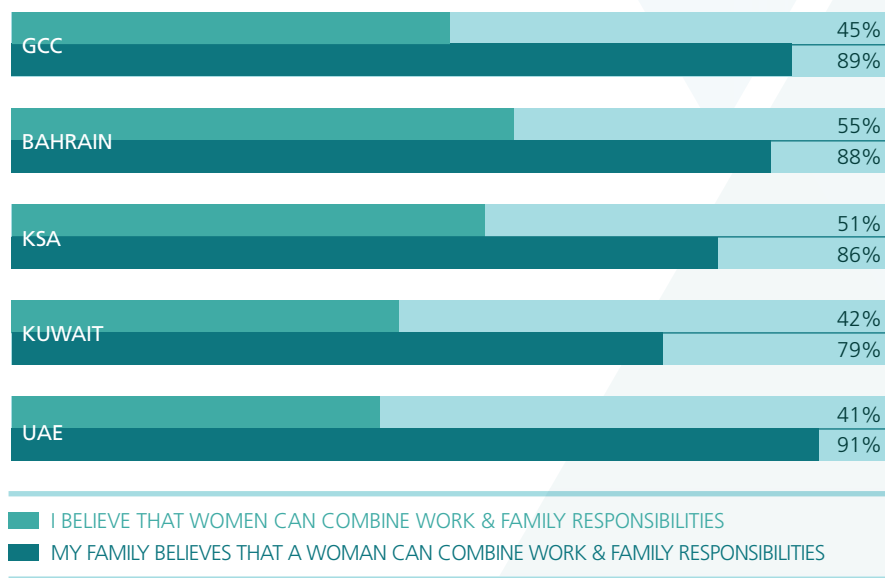
The 'family factor' is also markedly more significant for GCC national women, compared to non-GCC nationals (77% against 67% citing family as important), which is no doubt a reflection of the strong family culture in the region, and the traditional cultural norms that are still so important here. In fact, an average of 86% of the women we surveyed agree that their family's emphasis on education has been vital to their career progression, not only in their support for university education, but also in having high expectations and encouraging them to fulfil their full potential. Our focus groups also emphasised the importance of a supportive husband as well as parents, though a number of participants also observed that it's all very well for the family to celebrate academic success, the real question is whether they support women having a career outside the home thereafter.

"WE NEED MUCH MORE CAREER TRAINING FOR WOMEN. THEY ARE LEAVING UNIVERSITY WITH NO IDEA OF THE WORKING WORLD OUT THERE, AND TERRIFIED OF THE IDEA OF THE PRIVATE SECTOR."

Feedback from Jeddah focus group

This points to one of the great paradoxes – and great ironies – of these research findings: family may be the most valuable support a woman can rely upon, but it can also be the most significant impediment to her success. As Figure 6 shows, the respondents believe their families are more positive about the possibility of achieving a good work/life balance than they are. This is itself can be a burden, adding to women’s sense of inadequacy if they don’t match up to their family’s expectations:

FIGURE 6 CAN WOMEN COMBINE WORK AND FAMILY RESPONSIBILITIES?



* Number of responses from Oman and Qatar were not sufficient to be shown separately, but are included in the GCC figure

While families may be supportive in theory, their attitudes can prove limiting in practice: for example, as many as 16% of respondents in Saudi Arabia said their family would prefer them to work in an all-female environment, and 27% of those in Kuwait said their family would prefer them not to travel for work. Non-GCC nationals tend to find these constraints less significant than GCC national women.

“INCREASINGLY, MEN WANT WORKING WIVES, AS A DUAL INCOME IS ATTRACTIVE. BUT THEY MUST BE MORE SUPPORTIVE AS WELL.”

Feedback from the Riyadh focus group

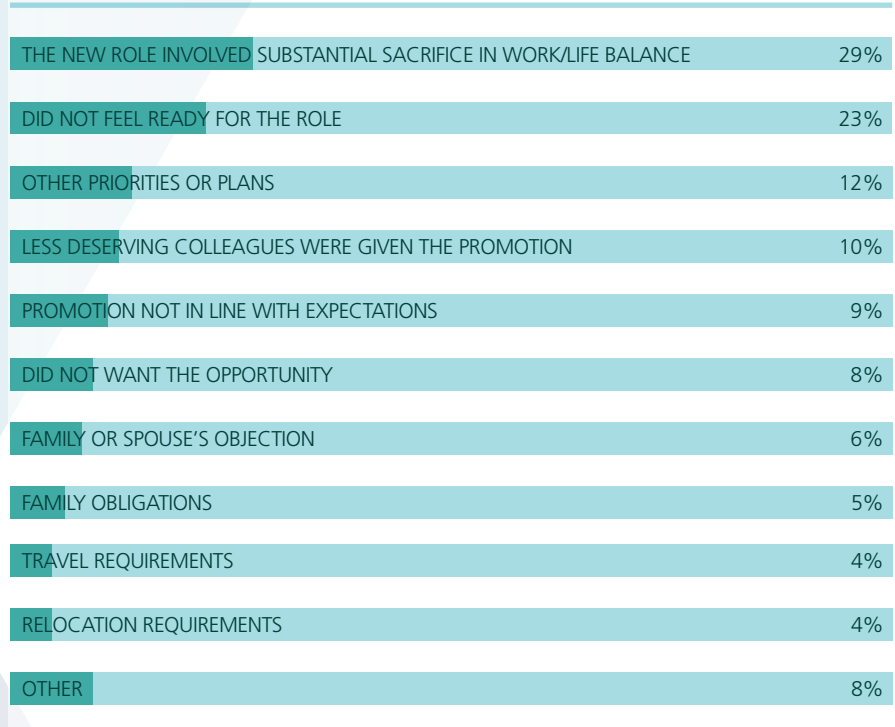
“THE SUPPORT OF THE FAMILY IS KEY. WOMEN WHO COME FROM PRIVILEGE, WITH A TOP-TIER EDUCATION AND TIME SPENT ABROAD, ARE OFTEN NOT THE ISSUE, AS THEY ARE MORE LIKELY TO HAVE THEIR FAMILY AND SPOUSE’S SUPPORT. THE ISSUE IS THE MAJORITY OF WOMEN ‘IN THE MIDDLE’ WITH A UNIVERSITY DEGREE, BUT NO CLEAR GOALS AND NO FEMALE FAMILY MEMBER WHO HAS EVER WORKED.”

Feedback from the Jeddah focus group

Across the world, it is the difficulty of combining work and family life which is often the principal, if not the only, reason a woman leaves the workforce, and the more traditional societies of the Middle East make this particularly challenging.

Women in the region can struggle to combine a career with their domestic responsibilities, and men are generally less likely to help at home than in other parts of the world, seeing their own role as that of breadwinner, not home-maker. In fact, only 45% of the survey respondents believe that a good work/life balance is feasible (even if 89% of their families think this elusive goal is achievable), and this holds true across the whole region. As many as 89% agree that the availability of domestic help makes having a career easier, but 34% said that if it came to a conflict between the demands of work and family, they would not be prepared to sacrifice family life. It's no surprise that more married women (43%) feel this way than single ones (19%). What was more surprising – at least initially – was that more non-GCC nationals cite this as an issue than GCC national women (39% as against 24%), but this may reflect the fact that they are far from home, without family to help with childcare. It is also very clear that this willingness to sacrifice their career is not merely a theoretical question: one in six of the respondents had already rejected a promotion at least once in their career, and the impact on family life was the most common reason for the refusal, as Figure 7 shows:

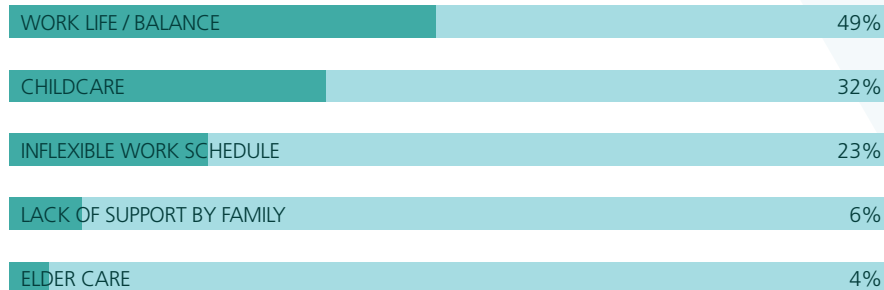
FIGURE 7 REASONS FOR REJECTING A PROMOTION *



**Respondents who have rejected a promotion in the past
Respondents could select more than one answer*

It is also significant that nearly half of the survey respondents believe that having a family will hamper their career – that it will, in effect, be impossible to 'do it all', and they will be forced to choose, as men almost never are:

FIGURE 8 FAMILY RELATED OBSTACLES TO CAREER ASPIRATIONS



Respondents could select more than one answer

“OCCUPYING A SENIOR ROLE REQUIRES HARD WORK AND ATTENTION, AND WORKING MOTHERS BEGIN TO PRIORITIZE WHAT MATTERS MORE TO THEM. MEN HAVE ONLY ONE MAJOR FOCUS WHICH IS SUCCEEDING AT WORK, WHILE WOMEN NEED TO SUCCEED BOTH AT HOME AND AT WORK.”

Jordanian respondent working in the UAE, married with one child

“BEING A SENIOR WOMAN IN BUSINESS IS HARD. IT INVOLVES CONSTANT PUSHING TO OVERCOME BARRIERS. OF COURSE IT IS POSSIBLE FOR THOSE WHO PERSEVERE, BUT MANY WOMEN GET DISILLUSIONED WITH HOW HARD IT IS AND DROP OUT.”

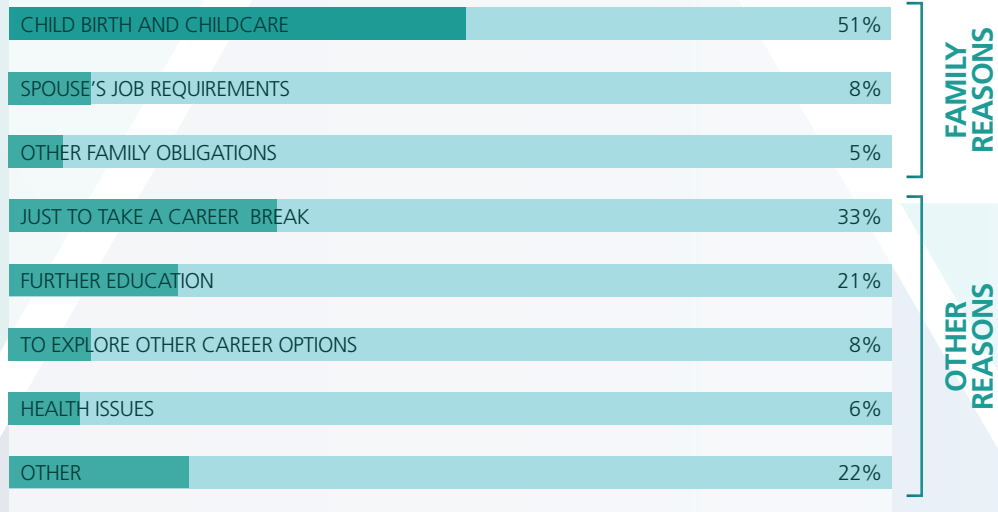
Feedback from Sharjah focus group

Many women in the region face this choice at some point in their professional lives, and often end up taking a significant career break, even though they know this will probably be viewed negatively by their employer. Over half of the respondents had taken a break or are planning to, and as Figure 9 shows, many of the reasons for doing this relate to their domestic responsibilities. It would be interesting to know how many of the 33% who just want a career break have struggled to ‘do it all’ and concluded - for the time being at least - that it’s simply not possible.

“IT IS OK FOR WOMEN TO BALANCE PHASES OF THEIR WORKING LIFE DEPENDING ON THEIR FAMILY COMMITMENTS. FOR EXAMPLE, ‘TREADING WATER’ IN A JOB WITHIN YOUR COMFORT ZONE WHEN YOU HAVE YOUNG CHILDREN, AND THEN ACCELERATING YOUR WORKLOAD AND ADVANCEMENT WHEN THE KIDS NEED YOU LESS. THE IMPORTANT THING IS TO PLAN THIS OUT.”

Feedback from Sharjah focus group

FIGURE 9 REASONS FOR TAKING A CAREER BREAK



Respondents could select more than one answer

SOCIAL ACCEPTANCE: PROGRESS IS BEING MADE

THE women we spoke to feel that society as a whole is still not entirely supportive of women in the workplace, and even less of women in senior roles. 66% of the survey respondents believe that it is socially acceptable for single women to work, and 64% consider that the same applies to married women with children.

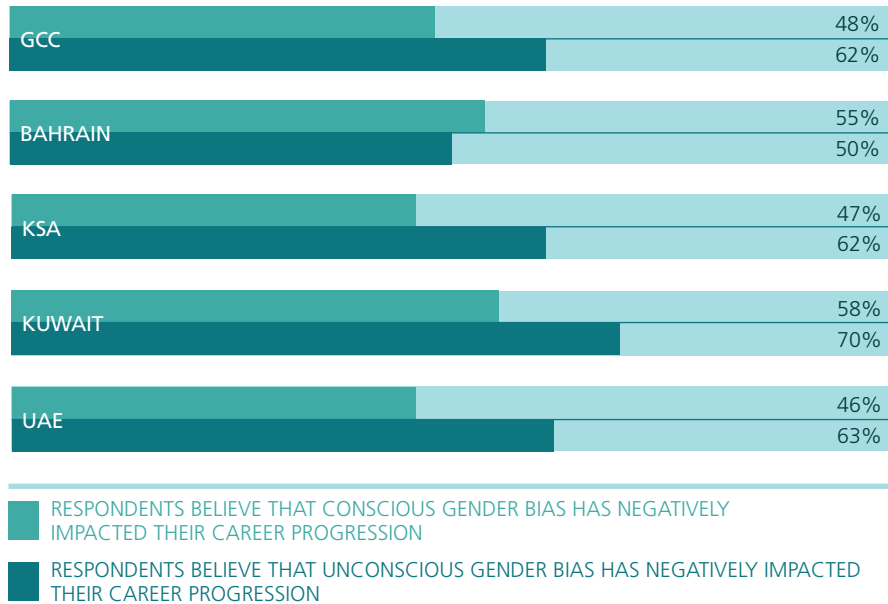
This was borne out in our focus groups, where several women observed that although some sectors (such as banking) are more advanced than others in terms of diversity, there is still a strong social pressure for women to take 'caring' jobs in industries like healthcare and education, or work for charitable foundations, rather than aspire to more traditionally masculine roles in business and commerce. It is clear that many women in the region are still working within a highly patriarchal system, and that it will take time and concerted effort to achieve a significant change in attitudes. On the positive side, just over 80% of the survey respondents agree that progress is being made in this area.

THE CORPORATE ENVIRONMENT: BIAS AND BARRIERS

TURNING now to the workplace and the opportunities for improvement. Only 27% of the respondents agree that the leadership in their own organisation is committed to having women in senior roles, and 48% believe to have suffered from conscious and 62% from unconscious gender bias at work (Figure 10). The more years a woman has been working, the more strongly she is likely to feel this, which may reflect either a greater awareness borne of experience, or increasing levels of bias as women move into senior roles.

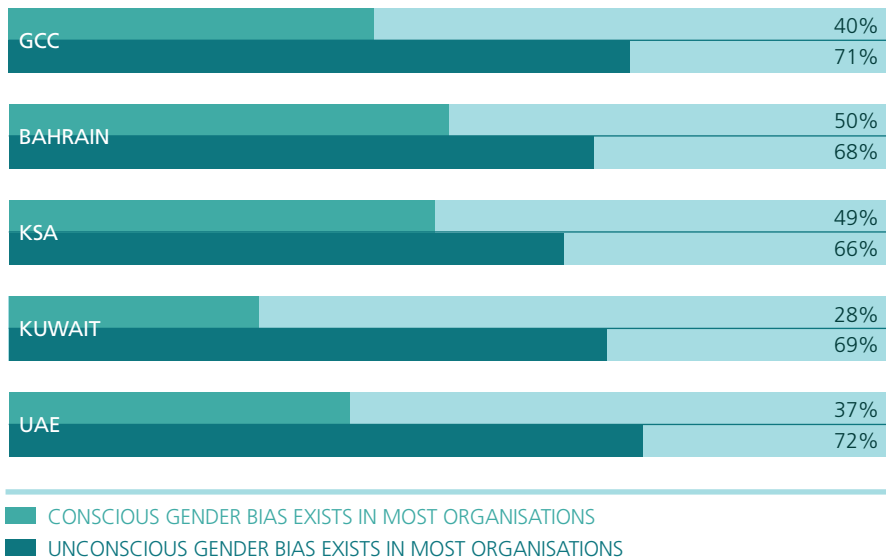
Around 40% believe there is conscious bias in most organisations in their market, but as many as 71% believe there is unconscious prejudice. Businesses from the GCC are more likely to exhibit conscious bias than multinationals, which is a measure of how much progress needs to be made in changing attitudes. It is not surprising, likewise, that non-GCC nationals report more examples of unconscious bias than GCC national women (75% against 62%) (Figure 11).

FIGURE 10 IMPACT OF GENDER BIAS ON CAREER PROGRESSION



* Number of responses from Oman and Qatar were not sufficient to be shown separately, but are included in the GCC figure

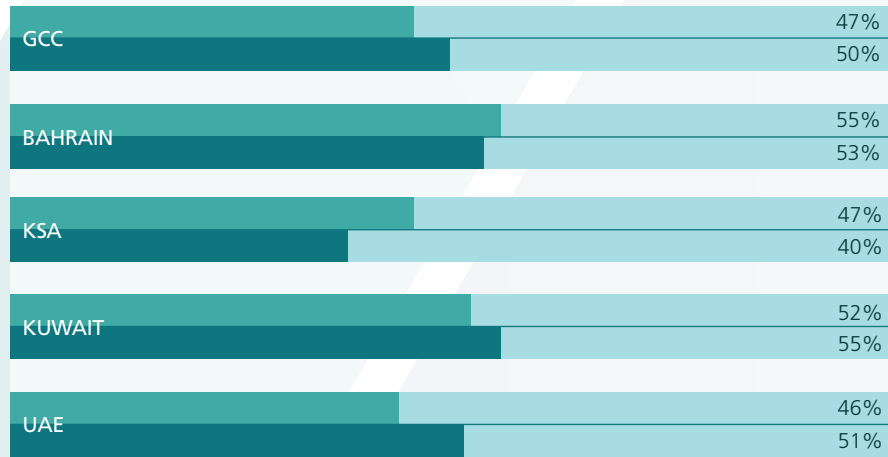
FIGURE 11 EXISTENCE OF GENDER BIAS IN ORGANISATIONS



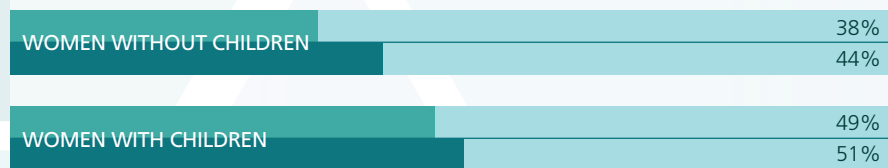
* Number of responses from Oman and Qatar were not sufficient to be shown separately, but are included in the GCC figure

FIGURE 12 NEGATIVE IMPACT OF PRECONCEPTIONS ON CAREER PROGRESSION

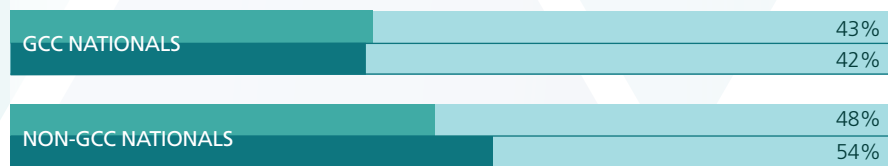
COUNTRY:



WOMEN WITH OR WITHOUT CHILDREN:



GCC NATIONALS:



- RESPONDENTS BELIEVE THAT MEN'S WORK PERFORMANCE IS PERCEIVED TO BE HIGHER THAN WOMEN'S
- RESPONDENTS BELIEVE THAT MEN'S COMMITMENT LEVELS ARE PERCEIVED TO BE HIGHER THAN WOMEN'S

* Number of responses from Oman and Qatar were not sufficient to be shown separately, but are included in the GCC figure

SO HOW DOES THIS NEGATIVE BIAS EXPRESS ITSELF?

IT leads to women being classed as 'risky' employees. Women in general – and women with children in particular – have to work harder to prove their competence and demonstrate their commitment, and they are less likely to achieve the promotions or salary levels of their male colleagues.¹⁴ In our focus group in Bahrain, for example, it was observed that men often assume that women are not able to cope with work, marriage, and motherhood at the same time, regardless of whether the evidence supports this. As the chart on the previous page (Figure 12) shows, around half of the survey respondents believe that they have suffered from this sort of negative stereotyping, and again, non-GCC nationals are more likely to believe this than GCC national women, and women with children more than those without.

14. Women and Leadership: The State of Play, Deborah L. Rhode and Barbara Kellerman, 2006; Getting a Job: Is there a motherhood penalty? Shelley J Correll, Stephaen Benard, In Paik, University of Chicago Press, 2007

“THOUGH REACHING A SENIOR LEVEL HAS COME AT THE HIGH PRICE OF PUSHING MYSELF TO THE LIMIT, I FEEL THAT WOMEN HAVE TO CONSTANTLY KEEP PROVING THEMSELVES; THAT WE WOULD NOT QUIT ALL RESPONSIBILITIES ALL OF A SUDDEN FOR FAMILY AND CHILDREN. MEN ARE TAKEN AS RISK-FREE WITHOUT ANY EFFORT.”

Kuwaiti respondent, married with children

“PEOPLE EXPECT THAT A WOMAN WILL GET PREGNANT AND LEAVE OR TAKE A BREAK. THEREFORE, SHE IS NEVER THE BEST CHOICE, BE IT A PROMOTION OR A JOB OPPORTUNITY.”

New Zealand respondent, working in the UAE

“THERE IS A PERCEPTION THAT WOMEN ARE ‘RISKY’ EMPLOYEES WHO WILL DEFINITELY TAKE A CAREER BREAK OR LEAVE WORK TO RAISE CHILDREN. FROM THE AGE OF 25 TO 35, PEOPLE EXPECT YOU’RE GOING TO GET MARRIED AND HAVE KIDS.”

French respondent with one child, working in the UAE.

This negative stereotyping leads to slower career progression and a perception that women do not enjoy equal opportunities in the workplace: 74% of the respondents believe women do not advance as quickly as men, and only 23% consider that women are treated equally. Non-GCC nationals are more likely to perceive this inequality than GCC national women, and private sector employers are perceived to have more of a problem in this respect than government organisations.

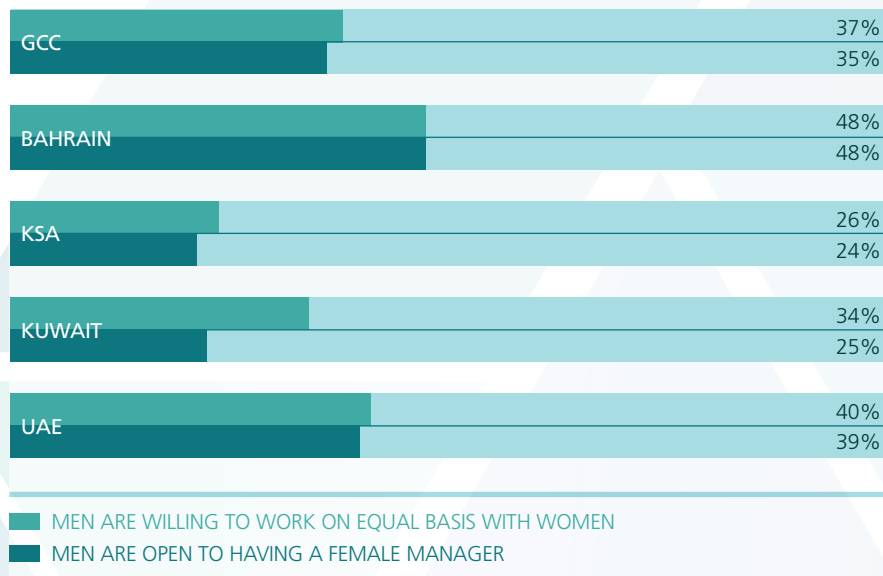
The respondents do acknowledge that they have received support from their employers, especially after they have had children and need to work more flexibly, but this may well have come at the cost of slower career progression, or more limited opportunities. The latter may be the result of an assumption that they will no longer be able to travel or relocate after they have children (which may or may not be true).

All of these factors together provide some explanations to why there are not enough women in senior roles in the GCC region. This lack of senior women leads to a dearth of female role models, which in turn makes it harder to tackle prejudice and stereotyping.

It is sometimes suggested that externally imposed quotas may be a way to resolve this issue, but only 24% of the survey respondents believe these have a positive effect. The research indicates that internal performance targets – if not quotas – can be useful at all career stages including recruitment, helping to change the ‘tone in the middle’ of organisations, and build up a pool of talented women able to push on to more senior roles.

The survey respondents draw attention to the key role played by their direct manager in supporting them and furthering their career with 76% identifying their manager as instrumental to their career advancement. However, looking more widely, they do not see any real commitment from their employers to support more female role models in the workplace. Only a third of them believe that men are willing to work for a female boss or even at the same level with a woman.

FIGURE 13 RESPONDENTS WHO BELIEVE THAT MEN ARE WILLING TO WORK ON AN EQUAL BASIS WITH WOMEN OR TO HAVE A FEMALE MANAGER



** Number of responses from Oman and Qatar were not sufficient to be shown separately, but are included in the GCC figure*

According to the focus group discussions the risk is that this becomes a particularly vicious circle: if men don’t want to work for women, they will also be reluctant (consciously or not) to promote women. This leads to a form of ‘mini me’ syndrome: men choosing successors who are similar to themselves, not just in gender but in age, leadership style, and industry experience. Many are not even aware they are doing this, which makes it even harder to identify and address.

Men also tend to be more confident about their own abilities, and more adept at presenting only their strengths. Likewise, character traits which are applauded in men – like assertiveness, authority or ambition - are distrusted or even derided and feared in women. None of this is unique to the Middle East, but the more male-dominated culture in the region potentially makes it more of a challenge. We have already seen that women in the GCC can feel inadequate even when there is no justification for such a view, and over a quarter of the survey respondents have rejected a promotion

because they did not feel they had the skills or experience to do the job well, which is an attitude rarely demonstrated by men.

“MEN CAN BE INTIMIDATED BY AN EDUCATED SUCCESSFUL WOMAN. THEY CAN FEEL THREATENED AND MAKE MORE EFFORT TO SIDE-LINE HER.”

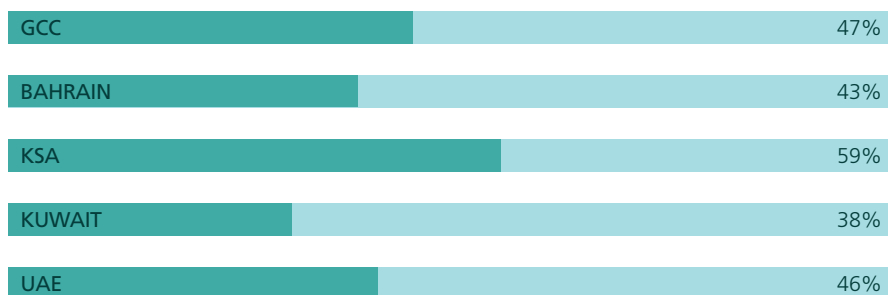
Feedback from Riyadh focus group

Men also benefit from formal and informal networking with other men from the workplace, which can be so vital in making useful contacts, and securing promotion and professional development. A number of women in the focus groups agreed that there are many formal and informal decision-making environments in the region to which women do not have full access.

“MANY WOMEN ALSO INTERNALIZE THESE STEREOTYPES, WHICH CREATES A PSYCHOLOGICAL GLASS CEILING. ON AVERAGE, WOMEN APPEAR LESS WILLING TO ENGAGE IN SELF-PROMOTING OR ASSERTIVE BEHAVIORS, OR TO TAKE THE RISKS THAT MAY BE NECESSARY FOR LEADERSHIP ROLES.”

*Deborah L. Rhode and Barbara Kellerman,
Women and Leadership: The State of Play, July 2006*

FIGURE 14 RESPONDENTS WHO BELIEVE THAT IT IS DIFFICULT FOR WOMEN TO NETWORK THROUGHOUT THE ORGANISATION TO THE SAME EXTENT AS MEN



** Number of responses from Oman and Qatar were not sufficient to be shown separately, but are included in the GCC figure*

47% of the survey respondents believe that this is an issue, and it is even more pronounced in Saudi Arabia. Companies in Saudi Arabia have to comply with segregation rules in office space, such that women sit - or have the option to sit - in a separate area. This can hamper communication between team members, and make

it difficult for women to compete for promotions or to lead projects. The more senior women become, the more important it is that they are visible in the workplace, and integrated into the management team.

Women's business networks do exist in the GCC, and they are valuable sources of support even though the research shows that such networks are not seen as an effective way of helping women to advance their careers, and are not therefore regarded as a priority. Creating networks involving both sexes however might be more effective, but could also be more challenging.

“THE PRESENCE OF ‘OLD BOYS NETWORKS’ MAKES IT DIFFICULT FOR WOMEN TO NETWORK. THIS IS THE BIGGEST BARRIER TO WOMEN’S PROGRESSION UP THE CAREER LADDER.”

Omani respondent

“SEGREGATION IN THE WORKPLACE IS A FUNDAMENTAL CHALLENGE, AS IT MEANS THAT WOMEN ARE OFTEN FORGOTTEN IN IMPROMPTU MEETINGS ETC. THEY ARE NOT REALLY CONSIDERED PART OF THE TEAM”

Feedback from the Jeddah focus group

SUMMARISING THE SURVEY: **SOME PROGRESS HAS BEEN MADE BUT SOCIAL ATTITUDES AND ORGANISATIONAL BIAS STILL HOLD WOMEN BACK**

- Women in the GCC are ambitious and over half of the survey respondents see themselves taking senior roles; they are driven more by personal growth and recognition rather than pay or power.
- But only 45% find it feasible to achieve a positive work/life balance, and combine a high-power career and a family.
- Even though three quarters of the respondents feel their families are supportive of their education and career, they are still hampered by traditional role models, and there is little evidence to suggest social attitudes are changing.
- 74% of respondents believe that within the workplace the most important influence on women's careers is their direct line manager.
- Nearly 80% of the survey respondents feel that simply being a woman put them at a disadvantage at work, and this was even more marked in Bahrain and the UAE. This creates a glass ceiling in the workplace, with a number of companies in the region still showing conscious or unconscious bias, which impede women's career progression.
- As a result, around half of the women opt out by taking career breaks, while others opt out by starting their own businesses or becoming self-employed, where they can have more control about how and when they work. But many – too many – opt out by leaving the workforce entirely, and hence the phenomenon of the 'leaking pipeline'.

We look now at some recommendations for what can be done about this.

RECOMMENDATIONS TO CEOs

LET'S start by looking at what women themselves recommend. We asked the survey respondents what support they would like to see, and Figure 15 shows the results:

FIGURE 15 KEY STEPS ORGANISATIONS COULD TAKE TO PROMOTE MORE WOMEN TO SENIOR LEVELS

WORK / LIFE BALANCE

FLEXIBLE WORK OPTIONS 51%

BALANCE CORPORATE CULTURE

TONE AT THE TOP - FULL SUPPORT FROM CEO 34%

COUNTERING GENDER BIAS WITHIN THE COMPANY 32%

PRESENCE OF FEMALE ROLE MODELS 9%

BUILDING CAREER PATHS

TRAINING, DEVELOPMENT AND COACHING OF HIGH POTENTIAL WOMEN 45%

MENTORSHIP PROGRAMS 20%

QUOTAS OR TARGETS FOR BOARDS AND SENIOR MANAGEMENT LEVELS 17%

TARGETS FOR PROMOTION CANDIDATES 16%

GENDER-SENSITIVE RECRUITMENT AND RETENTION 8%

WOMEN'S NETWORKS 6%

HR POLICIES

MATERNITY LEAVE POLICY	18%
CHILDCARE SUPPORT	18%
LEAVE- AND RE-ENTRY OPPORTUNITIES FOR WOMEN	18%
GENDER DIVERSITY AS PART OF THE ANNUAL APPRAISAL PROCESS	9%

It's clear that flexible working is far and away the most important measure for the women we spoke to, and this is at the heart of the first of our five recommendations for CEOs. The first four recommendations cover the direct action they can take within the workplace, and the last looks more widely at society as a whole.



1. IMPROVE WORK / LIFE BALANCE

FLEXIBLE working is key to this. Many organisations offer flexible working in theory, but the reality in practice is very different – often because women feel unable to ask for it, because doing so would be viewed negatively by both their manager and their male colleagues. The most pioneering approach would be to offer the same flexible working options to men, to demonstrate equity in the workplace, and pre-empt any suggestion that women are getting favourable treatment.

Implementing flexible working effectively requires two things: efficient technology, and a high level of trust between managers and employees. Working flexibly does not mean working less – in fact, those who have the chance to manage their own working time often put in longer hours and are more committed. This is why it's important to have appraisal systems that measure people on their outputs, not their inputs – on what they achieve, rather than the number of hours they spend in the office.



2. CREATE A BALANCED CORPORATE CULTURE

CEOs have a particular opportunity and responsibility to be a role model by actively supporting women at work. Every organisation takes its character from the behaviour of those at the top, which is why a supportive CEO can be so instrumental in establishing – and if necessary changing - corporate culture. Every employee needs to be clear about the standards of behaviour required, and what is - and is not - acceptable. The CEO has a key part to play here.

In general, the focus should be on supporting women in middle management: as we have seen, this is the 'pinch point' for the leaking pipeline, and the phase of a women's career where she is usually facing the greatest challenges in balancing home and work responsibilities. It's all about the 'tone in the middle', which will take its cue from the 'tone at the top'.



3. INVEST IN BUILDING CAREER PATHS

ORGANISATIONS need a comprehensive approach to training and development for women, from professional skills training, to specific modules designed to prepare senior women for board level roles.

More effort also needs to be invested in identifying high potential women and planning their careers, so they can be 'pathfinders' for women in middle management, and demonstrate that success is within their capabilities. This career planning should include providing mentoring schemes and senior sponsors within the organisation. This sort of planning will help identify opportunities for women to take on high-profile projects – this type of experience has been shown to be crucial in preparing individuals for leadership roles, and building their profile within the organisation. Proactive career planning will also help women identify any skills gaps they may have (hard or soft), and formal management development will help them become more confident with their own leadership style, and more willing to be assertive in the workplace. In short, organisations should focus on skills and capabilities, rather than management style or gender, when promoting individuals and creating their senior teams.

There should be regular audits of the numbers of men and women at different levels of the organisation, supported by KPIs which are reported both internally and externally. Some of our focus group respondents also suggested externally imposed quotas, especially at board level, though only 24% of the survey respondents believe this practice to be effective. Quotas have also had mixed success elsewhere in the world, and can leave women open to accusations of tokenism. One compromise can be to impose quotas on the numbers of female candidates, rather than appointees, which begins to ensure a greater equity of opportunity.



4. ADOPT HR POLICIES THAT ENSURE EQUITY

RECRUITMENT, pay, and promotion should be 'gender blind', and based solely on skills, qualifications, and fitness for the role, and any bias towards masculine characteristics or leadership styles should be identified and counterbalanced.

There is a need for robust diversity and equity policies, and a zero tolerance of sexual harassment and bullying. This should be backed up by diversity training, with a special emphasis on teaching men how to work with – and for – women.

Companies should explore the business benefits of going beyond the statutory requirements for maternity leave and pay. As the survey shows, this is particularly important for married women and mothers. On-site childcare facilities are another area worth exploring. When women are on maternity leave, it would be helpful to find ways to keep them involved in the organisation, through regular communications on new developments in the company and opportunities in the workplace, as well as the chance to continue their professional development while on leave. This will help ensure they still feel part of the team.

In Saudi Arabia, companies should focus on adapting their HR policies to address the particular issues faced by women in a segregated workplace – this includes office layouts, communications, and other practical issues such as transportation to and from meetings.



5. BE AN ADVOCATE IN THE WIDER COMMUNITY

SENIOR male and female business figures can be enormously influential in changing social attitudes, especially in the GCC region. CEOs can make a difference by being seen and heard to support women in the workplace, and helping to promote positive female role models. They can also make a huge impact by contributing speeches and editorial comment on the value of a more diverse workforce for both their own business, and the wider economy. It is particularly important for the next generation of women to feel valued and empowered, so addressing both young women and young men at schools and universities is especially valuable. Inside the business and outside it, success stories should be shared and celebrated.

Business leaders can also lend their personal support to women's networks and mentoring schemes. A good example is the FTSE 100 'cross-company mentoring scheme' in the UK, which is supported by the Chairmen of 28 major companies. They can also ensure their businesses become signatories to the UN Global Compact Women's Empowerment Principles (<http://weprinciples.org/>).

“WE NEED TO FIND A WAY TO CREATE MORE ‘ADVENTURERS’ - WOMEN WHO ARE AMBITIOUS, WANT UNCONVENTIONAL CAREER PATHS, AND ARE PREPARED TO GRASP THE OPPORTUNITIES THAT ARE OUT THERE.”

Feedback from Riyadh focus group

The findings in this report are in alignment with the Women's Empowerment Principles (WEPs), a partnership initiative between the UN Global Compact and UN Women, which provide a comprehensive framework for business on how to empower women in the workplace, marketplace and community. As of January 2015, over 850 CEOs from around the world have signed the CEO Statement of Support for the WEPs, demonstrating leadership on gender equality and support for the guidance provided by the Principles. Subtitled Equality Means Business, the Principles emphasize the business case for corporate action to promote gender equality and women's empowerment and are informed by real-life business practices and input gathered from across the globe. The WEPs seek to point the way to best practice by elaborating the gender dimension of corporate responsibility, the UN Global Compact, and business role in sustainable development. As well as being a useful guide for business, the Principles seek to inform other stakeholders, including governments, in their engagement with business. More information can be found at www.WEPinciples.org.

RESEARCH METHODOLOGY

THE RESEARCH FOR THIS REPORT WAS CARRIED OUT IN THREE PHASES:

1. ONLINE SURVEY

THE first phase of the research was an extensive 15-minute online survey in English and in Arabic with over 600 female respondents working in senior management and executive positions in the Gulf region. The survey ran between April and June 2014. Businesswomen councils, women's networks, corporate partners and well-networked individuals in each of the Gulf countries assisted in sending out the survey questionnaire to their networks and ensure high respondent levels.

ABOUT THE SURVEY PARTICIPANTS

THE research targeted women of all nationalities working in senior management and leadership positions in all types of public or private organisations. The geographic scope of the research was the entire Gulf Region.

We collected a total of valid 604 responses, including only fully completed questionnaires of women with more than 4 years of work experience and who are currently based in the GCC. 55% of the respondents have children.

FIGURE 16 COUNTRY OF RESIDENCE

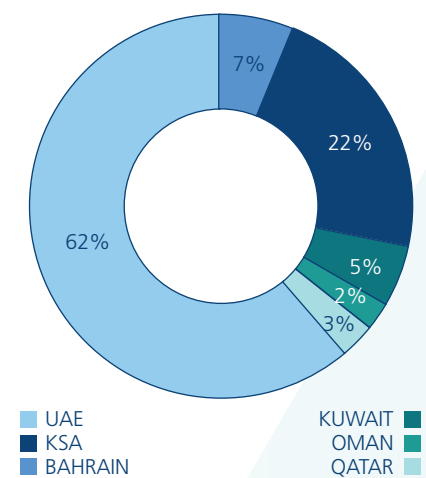


FIGURE 17 NATIONALITY

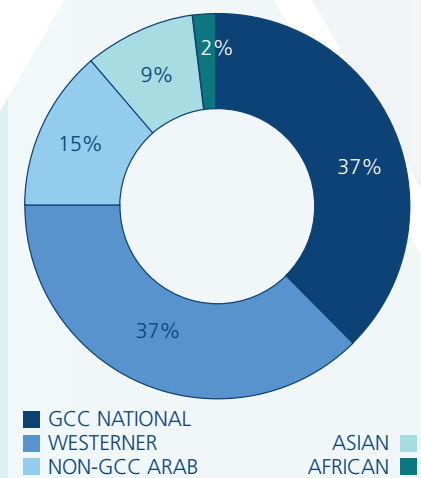


FIGURE 18 YEARS OF EXPERIENCE

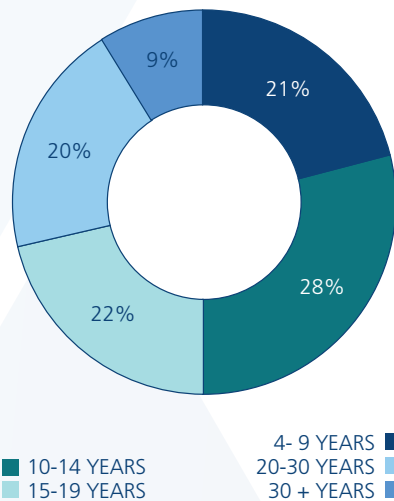
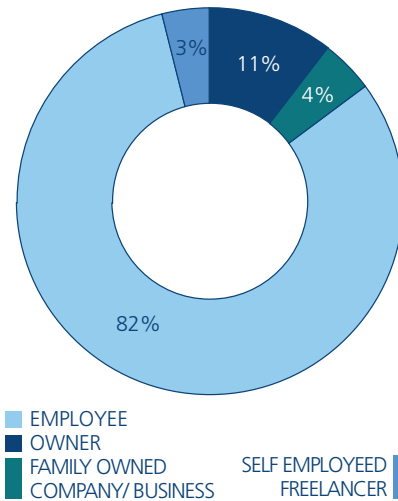


FIGURE 19 TYPE OF EMPLOYMENT



2. FOCUS GROUPS

THE SECOND PHASE INVOLVED FOUR FACILITATED FOCUS GROUP SESSIONS WHICH WERE HELD IN:

- Sharjah Ladies Club, Sharjah, UAE (Twelve participants).
- Capital Club, Manama, Bahrain (Twenty one participants).
- Atheeb Group offices, Riyadh, Saudi Arabia (Nineteen participants).
- PwC offices, Jeddah, Saudi Arabia (Thirteen participants)

3. DESKTOP RESEARCH

THE third phase was extensive desktop research on the views and perspectives of women in management in the GCC. This included internet and database searches for articles, previous research and other available information, and relevant secondary-sourced insight which is also cited in this report.

ABOUT THE PEARL INITIATIVE

THE Pearl Initiative (www.pearlinitiative.org) is the leading independent, not-for-profit, by-business for-business, organisation working across the Gulf Region of the Middle East to influence and improve corporate accountability and transparency.

Developed in cooperation with the United Nations Office for Partnerships, it is a regionally-focused growing network of business leaders committed to driving joint action, exhibiting positive leadership and sharing knowledge and experience in order to positively influence the entire regional business and student community towards implementing higher standards in areas such as corporate governance, anti-corruption, codes of conduct, integrity and reporting.

The Pearl Initiative and the United Nations Global Compact drive joint programmes, as part of their Strategic Partnership, in order to advance the adoption of the “Ten Principles” by the private sector within the Gulf region.

THE PEARL INITIATIVE DELIVERS:

1. REGIONAL RESEARCH-BASED INSIGHT REPORTS.

The Pearl Initiative publishes several research-based insight reports each year. The recent publications include a series of reports on Good Governance in Family firms in the GCC, featuring surveys and case studies as well as a series of reports on Good Corporate Practices in the GCC demonstrating best-in class examples of integrity and

transparency practices in companies in the GCC. All publications, which can also be used as teaching material, are freely and widely disseminated across the business community and universities in the region.

2. CONDUIT FOR BEST PRACTICES AND RESOURCES.

The Pearl Initiative is the leading regional authority on corporate accountability and transparency, offering comments, expert opinions, and a free online resource for information, thought leadership, trends, links, views, insight, ideas exchange, tools, good practices library, examples and contacts.

3. BUSINESS DIALOGUE FORUMS.

The Pearl Initiative convenes business leaders and multi-stakeholder constituents at the highest level, and at the operational level – in free dialogue forums, experience-sharing sessions and capability-building seminars.

4. UNIVERSITY PROGRAMMES.

The Pearl Initiative runs interactive, inspiring seminars and programmes, such as the Student Case Study Competitions, to help embed the values of business integrity in our leaders of tomorrow.

PARTNER COMPANIES (AS OF MARCH 2015)







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