

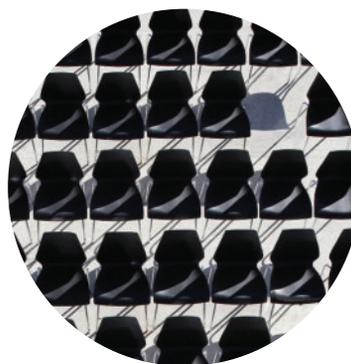
**View from the top**  
What business executives  
really think about women  
leaders in the GCC



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# Introduction

The topic of women in leadership has taken on a greater significance in recent years as more and more research produces compelling arguments for the positive impact of women as senior executives and at board level. At the same time, achieving gender equality and the empowerment of all women and girls is seen as making a crucial contribution to progress across the new goals and targets set by the United Nations (U.N.) which came into effect on January 1, 2016. By 2030 the U.N. aims for “women’s full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic and public life”<sup>1</sup> to have been achieved. The Social Progress Index (SPI), the first index of its kind to utilize wide-ranging social indicators in one single analytical tool without economic indicators, also places gender equality and empowerment of all women and girls among its “Foundations of Wellbeing” indicators<sup>2</sup>.

The following report focuses on the many issues surrounding women’s representation at executive and board level in the Gulf Cooperation Council (GCC) countries. While some progress on gender diversity at

executive level in the region has been made, much still remains to be done. The SPI’s 2015 survey, for example, analyzed data for more than 133 countries including three from the GCC, among which the United Arab Emirates (UAE) ranked 39<sup>th</sup> globally for its social progress<sup>3</sup>. Looking more closely at the issue of women executives, they account for 17% of total executives in the UAE, but only 7% in Qatar, according to the International Labor Organization (ILO)<sup>4</sup>. The disparity between figures such as these indicates that it is important not to consider the Middle East or even the GCC countries as one homogenous entity, but rather that each nation is shaped by its own specific culture and business environment. Still, across the GCC region there are some pertinent statistics worth noting when considering the issue of gender diversity generally. In each country, for example, men outnumber women in the total population, and this imbalance is greatest in the UAE and Qatar where there is almost double the number of men to women<sup>5</sup>. Additionally, with the exception of Kuwait, youth unemployment rates in GCC countries are much higher for women<sup>6</sup>. Expatriate resident workers also constitute large percentages of the local

populations: this figure is more than half in the UAE and 44% in Oman, for example<sup>5</sup>.

The following report presents findings from a study conducted among male and female “C-suite” executives (a firm’s most senior executives and members of corporate boards), and both nationals from the region and expatriates from outside. Respondents were also selected from the private and public sectors across the GCC countries of Bahrain, Kuwait, Oman, Qatar, Kingdom of Saudi Arabia (KSA) and the UAE, thereby drawing on the perspectives of a sample whose diversity reflects that of the region. We would like to express our gratitude to all those who agreed to take part in this survey. Their opinions and the survey results proved to be equally diverse, and indicate the importance of moving forward without a one-size-fits-all approach. Indeed, while those looking in from outside the region may assume or perceive that unifying aspects such as religion or family culture may be the driving forces behind the current state of play for gender diversity at executive level, in reality gender issues are more nuanced and may be impacted by a number of variables, including external market forces, government and policy, personal motivation and more<sup>5</sup>.

At Deloitte we believe strongly that women in leadership is an issue of importance not only to us but to our clients too. We see gender diversity as a business issue — and believe that embracing diversity

helps member firms serve clients better. Of course diversity is also integral to spur social development globally.

On a global and regional level Deloitte has been active for many years in seeking to increase the participation of women in boardrooms across the globe. Globally many reports have been issued, including a series of “Women in the Boardroom: A Global Perspective.” However, the following study marks the first of its kind for Deloitte in the Middle East, and is significant in terms of its inclusivity and diversity.

This study was also conducted in collaboration with the 30% Club GCC Chapter, established in 2015, which counts Deloitte partners as steering committee members and founding chair seat. The 30% Club GCC Chapter is a regional volunteer effort of multi-sector leaders working together towards better representation of women on boards and in senior level positions. The 30% Club strongly believes that business-led change is the right way forward while advocating good governance to support women who serve on boards.

It is hoped that this study will form the basis for further discussions, and, subsequently, action. Although one of the messages that came out of the study was how much is said but little is done, we believe that it is still crucial to create dialogue as a starting point from which initiatives can arise.



# Foreword

At the 30% Club GCC Chapter we advocate for voluntary efforts by leaders from both the public and private sectors to accelerate and achieve gender parity at the highest levels of organizations. Our work centers on key pillars that include:

- Creating a cultural shift to support women's rise to senior roles and provide for an enabling and inclusive environment within companies.
- Improving executive search policies on the hiring end by helping companies find and hire talented and capable women candidates to fill executive positions.
- Offering company incentives on opportunities for executive and higher education programs for women, including mentoring and networking support.

There is no doubt that significant social and economic changes have played a role in supporting women's workforce participation in the GCC in the past few decades. Increased focus on quality education and government initiatives supporting women's inclusion in senior roles have contributed significantly, especially within the public sector. In the UAE, the

Gender Balance Council for example, has helped boost women's role in building the economy and in ensuring women's representation on boards of government-owned entities and publicly-listed companies. In Saudi Arabia, allowing women to vote and run for municipal councils for the first time in 2015 constituted a major reform towards women's participation in the public sector.

Employment practices in the GCC are seen as being in line with global best practices governing women's working conditions. Local labor laws and employment legislation across the GCC govern equal pay. In Saudi Arabia, as one example, the labor law clearly forbids a gender pay gap. Yet, several statistics in the GCC show very low percentages of women in senior roles and on boards. Women represent as little as 0.1% of board composition in Saudi Arabia, with the highest percentage in the GCC seen in Oman at 1.8% representation<sup>7</sup>.

It is not acceptable that current socio-economic and political conditions hinder the full participation of



women at board levels. A growing body of studies and research shows that diversity on boards, and gender diversity in particular, are associated with a set of benefits including improved financial performance and shareholder values, higher investor confidence as well as greater market knowledge and participation. In fact, companies with strong female leadership deliver a 36% higher return on equity<sup>8</sup>.

Women in GCC lack neither ambition nor drive to reach very senior roles and to sit on boards. The 2015 research by the Pearl Initiative<sup>9</sup> states that over half of the women surveyed see themselves taking on senior roles, yet only 45% of those feel it is feasible.

The report "View from the top: What business executives really think about women leaders in the GCC" takes a closer look at the current situation through the eyes of leaders, and seeks to provide a basis for dialogue as well as recommendations to increase the number of women in senior roles.

# Executive summary

This report represents the culmination of a study carried out between October 2015 and January 2016. The study objectives were to identify and analyze attitudes and perceptions of high-level, professional male and female leaders in the GCC region with regards to women's progress to senior management positions and board level. Respondents were specifically chosen to represent a diversity of gender, industry, and of nationalities, but to be leaders in their respective business fields. In-depth interviews were conducted with these leaders with the aim of revealing their candid thoughts on the challenges and opportunities faced by women, as well as their thoughts on practical actions that can be taken to improve the outlook for the future and to build on existing progress. The results are intended to be used as the basis for dialogue that can lead to greater discussion, and, therefore, more action and results in terms of women attaining leadership positions in the region.

The report focuses on the key findings of the views of C-suite leaders interviewed. These can be summarized as follows:

- **Women on boards is not seen as a priority for businesses at the current time**

Other more pressing issues in the region are seen as presently sidelining the issue of gender diversity at executive level.

- **Mixed views on the importance of board representation of women and how to achieve progress**

Although there is support for the idea of women as

business leaders, it is felt that there is currently more talk than action.

- **The issue of quotas proves to be controversial**

Although quotas received some support, the majority of respondents opposed their implementation.

- **Unanimous acknowledgement that women leaders have a positive impact**

There is general consensus on the positive impact of women leaders, both from an economic and business culture perspective.

- **Barriers and bias do exist**

Women in the GCC region are challenged by societal norms and business culture in their rise to positions of senior leadership.

- **Progress varies across industries and sectors**

The public sector continues to be seen as the most attractive career path for women, although it is beginning to lose some ground to entrepreneurship and the private sector.

- **A new generation of hope is emerging**

Generational differences between women are perceived to exist with the younger generation emerging as more likely to challenge the norms of society.

- **The region looks to the UAE as a positive example**

Although benchmarks and role models among organizations are seen as lacking across the region, countries are making a difference at a public policy level, and the UAE is recognized for the commitment from leadership that has played a positive role to date.





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## Study finding 1

# Women on boards: Not a priority in the current climate

Looking at the GCC countries, the share of women represented on company boards does not exceed 2%, according to the latest International Labor Organization report<sup>4</sup>. Additionally, research from the GCC Board of Directors Institute (BDI) places the figure of GCC women on boards or executive committees at less than 1%<sup>10</sup>, thereby ranking the region among the lowest in this respect worldwide. However, such statistics should be measured against some promising signs of progress in the region with recent public policy developments in the GCC providing hope for improved results in the future. Additionally, some countries have already begun to show progress. In Bahrain, for example, the share of companies with female board members increased from 12% in 2010 to 14% in 2014<sup>4</sup>.

In the Deloitte and 30% Club GCC Chapter study, the majority of respondents felt that a greater number of women at board level is not a priority in the GCC presently, although some noted that this could also be said of anywhere in the world, and that gender diversity is a concept that is often talked about but not acted upon. Notably, more pressing concerns, such as oil prices and their economic impact, as well as the geopolitical situation, were seen as taking precedence, resulting in the issue of increasing the presence of women on boards being neglected. Cultural influences were also felt to play a role in the hitherto lack of gender diversity, with women facing barriers that impeded any rise to the top, including pressure from society and family, and the absence of a support network.



"[Boards] have more basic priorities. It's a very early stage of sophistication: international standards and corporate governance are not a priority yet."

**Female private sector head,  
expat, UAE**

"Nowhere on the globe are we where we would like to be – governments or business. The Middle East is no exception."

**Male private sector CEO,  
citizen, Kuwait**

"Many male board members say that women are not ready yet."

**Female private sector CEO,  
expat, UAE**

"Currently, all boards of directors are very concerned and focused on overcoming the drop in oil prices and planning a sustainable strategy."

**Male public sector executive, citizen, Oman**

"There are very few women on boards, except a few that are always showcased in the media. Even in Europe the numbers are low. They might be improving but there is a long way to go for us in the GCC to be close to European standards."

**Male private sector executive, expat, UAE**

"The cultural attitude is the overwhelming factor why there aren't more senior women. It's unrealistic to expect companies to overcome these cultural and societal issues – it's an uphill battle."

**Male private sector executive, expat, UAE**

## Study finding 2

# A preference for hiring women exists

In the past decade much research has been conducted to determine the economic impact of women as business leaders, with a number of studies pointing to greater profitability and stronger performance. Such a view was reflected in the Deloitte and 30% Club GCC Chapter study with many of the respondents feeling that women's advancement to boards and C-suite positions is beneficial for the growth and stability of the economy. However, there were other positives related to having women as leaders, not just in terms of financial or economic benefit. Women were felt by some respondents to have a different approach to managing companies and situations, and acted as an important adjunct to corporate culture inasmuch as they were perceived as being more organized and focused, and as more sensitive than their male colleagues. Subsequently they were seen as representing an important balance to counteract male domination of an organization, and as galvanizing in terms of bringing people together. The positive values associated with women were seen as giving rise to a preference for hiring women.

### Case study: Overcoming board reticence through leading by example

One male expatriate CEO in the UAE said that having been raised overseas, his attitude towards corporate governance and women's empowerment was different from many men in the GCC. In his current company, all the board members are male and most of the shareholders are family groups, which are perceived as the most traditional in their views on women in the workplace. However, the respondent took the initiative to grow the company and it now has roughly 100 employees, about half of whom are women and whose highest position tends to be middle and some senior management. Although initially board members were surprised by this move, they soon realized that the best qualified people had been recruited for these roles, and now females head two functions in the organization.



"In the past few years, the environment has changed radically in the GCC generally and the value of women as workers has been recognized."

**Female private sector executive, citizen, KSA**

"Our CEO is a woman. 40% of our council are women. We don't have structured programs – it is just a fundamental core value of the organization. We have a large global pool of talent to fish from and we seek to give senior opportunities equally to women and men."

**Male private sector CEO, citizen, Kuwait**

"It is important to have women in these [board] positions. It is beneficial for the growth and stability of the economy. Women have a different approach to managing companies and situations, and it is important to have these options versus male domination."

**Male private sector CEO, expat, UAE**

"There are all types of [gender diversity] initiatives being taken in my organization. For example, if we need to choose between a man and a woman for a partner position, the woman will surely get it over the man. Many other initiatives are being taken at associate level."

**Male private sector executive, expat, UAE**

"In the GCC companies are looking for females as they are seen as more committed, more productive and better employees than males. Males are viewed as not interested in employment because of a good welfare state."

**Female private sector CEO, expat, UAE**

### Study finding 3

# Strategies for gender diversity at executive level still needed

Despite the positive affirmations that women are often hired over men, respondents clearly felt that more needs to be done to encourage women on the path to executive positions. Some respondents noted that measures have already been taken in their respective organizations, but overall the feeling was that more can and should be done in the region, and that now was the time to build on any progress to date with tangible results.

One senior executive in a professional services firm gave the example of a company in Europe that they had worked for previously, which took rigid steps and provided guidance on what was required to get to leadership level. However, this process was found to be counter-productive and subsequently the firm started to accommodate more female leaders through a flexibility program encompassing maternity and time off. A good proportion of respondents cited the need for similar initiatives in the region in order to create the right conditions for greater gender diversity at leadership level. Additionally, it was felt that more needs to be done in recognizing the important contribution of women to society.

Suggested actions and best practices according to respondents included:

- Taking proactive steps to recruit qualified women
- Setting of gender targets
- Ensuring gender diversity and inclusion were part of the DNA of the business
- Commitment from top management
- Creating networking opportunities
- Providing mentoring
- Offering flexibility of hours and working arrangements
- A change of mindset regarding onsite childcare and provision of infrastructure
- Providing training
- Actively developing a pipeline of female talent

Exit interviews were also felt to be important in terms of putting in place remedial actions when women resigned because of issues relating to gender. Some respondents noted that there were few best practices upon which to draw in the GCC and that very little strategic or systematic action was actually taking place among businesses to increase women leadership.



"In the US companies have made a choice to put [gender] diversity at their core, and make it a priority, yet we are not at this level in the region."

**Male private sector COO, expat, UAE**

"A pipeline has been identified of potential female leaders and we are actively building this pipeline."

**Female private sector executive, expat, UAE**

"Mentoring for young Arab women is very useful as this inspires them [to see] that it is not too difficult, but little mentoring is taking place. Networking is also useful."

**Female private sector CEO, expat, UAE**

"I believe education and awareness about the role of women in society and their contribution to the household are crucial. I don't believe we are doing enough on that front."

**Female public sector executive, citizen, Kuwait**

"Kuwaiti women have equal rights to men, and perhaps in certain instances we see women that are quite independent and with influential personalities. Kuwait in general has been generous in civil rights, providing equal opportunities. I believe that now should be the time for consolidation of those rights, and a focus on delivery."

**Male private sector CEO, citizen, Kuwait**

"We need a change in the mindset not to compromise on family to have a career. There should be flexibility for women to achieve balance in certain environments and we need a more inclusive environment – especially in the public sector."

**Female public sector senior manager, expat, UAE**

"The most important aspect is the culture of the organization. You have to ensure that the entire organization is completely open for having women at the top levels. All is doomed to failure if you don't have this. The tone from the top is key."

**Male private sector executive, expat, UAE**



## Study finding 4

# Quotas prove controversial

In a bid to improve the gender balance of boards, a number of countries around the world have introduced a quota system, whereby boards are obliged to meet pre-set targets for female representation. Norway's public sector and public limited companies, for example, have a 40% female representation quota set for their corporate boards. In 2014, France introduced a 20% quota that will be increased to 40% in 2017. Within the GCC the UAE Cabinet issued a ruling in 2012 that obliged all state-owned corporations to include at least one female board member.

Generally, though, quotas remain a controversial issue in terms of their effectiveness and necessity. A recent study by the Pearl Initiative, for example, found that only 24% of survey respondents believed the practice of quotas to achieve gender diversity to be effective<sup>9</sup>. In the Deloitte and 30% Club GCC Chapter study, similarly, respondents had mixed views on whether the GCC should pursue the example of other countries to institute quotas.

Reasons given for not advocating the quota system:

- Quotas are tantamount to reverse discrimination.
- The balance will correct itself as the education and opportunities of women increase.

- Men would be hostile to quotas.
- Alternative routes should be explored first, such as, changing school times, affordable after-care and home support, increasing the supply of educated women, coaching, mentoring, awareness and target-setting.
- Quotas would create a false dynamic, that having inexperienced women on boards sends a worse message than having no women at all.

Not all respondents were against the quota system as some felt that such an initiative could kick-start the process of women's representation on boards, and that once people got used to the idea, they would become less resistant to it. However, it was felt that a clear rationale of why quotas were necessary would be required along with well-designed processes and follow-up for implementation, and that they may not work in all countries of the GCC.

Reasons given for supporting quotas:

- "What gets measured gets done" and therefore target-setting would be of value.
- Alternative solutions so far have proved to be problematic, so quotas are worth trying.
- If properly managed, implemented and with the right talent pool, they could work.



“Quotas make me queasy. I believe in a meritocracy and that quotas will lead to window-dressing and a reduction in quality. There will also be a strong reaction from males who will see it as discrimination. I am not really sure we have fully explored other routes. For example, school-times do not support working women around the world and after-care is often unaffordable as is a home-support system.”

**Male private sector CEO, expat, UAE**

“Yes we need women on boards, but putting quotas is not the way to go about it. What women need is to be better coached, educated and mentored, to be prepared to be on boards, because they deserve it. But not just to fit a percentage.”

**Male private sector group head, expat, UAE**

“Quotas sometimes work but more than quotas, we need awareness. The mindset of the people needs changing first and this is happening.”

**Female public sector CEO, citizen, UAE**

“I am against quotas and positive discrimination. It drives the wrong behavior and discourages others. Quotas are impossible anyway in the Middle East as there is a scarcity of qualified women. There is an under-representation of women even at the first level of recruitment.”

**Male private sector executive, expat, UAE**

“If we need quotas, we should implement them. But if you set them, you should also provide guidance and tools to help organizations achieve them.”

**Female public sector executive, citizen, KSA**

“Yes [we need quotas], although this is a very controversial subject. The quotas should be properly managed, and there should be a transitional period to ensure they are being implemented, and to tap on the right talent pool.”

**Male private sector CEO, expat, Bahrain**



"I don't believe it is necessary. I believe that it should be left to the normal market dynamics, with the best [candidate] filling the right position."

**Female public sector executive, citizen, Kuwait**

"An arbitrary quota is a recipe for the creation of a board that doesn't function at the correct level. But organizations must be urged to make a plan to mentor, coach and train women, and to recruit female personnel to fuel this plan."

**Male private sector director and CEO, expat, Oman**

"The UAE mandates companies to have women on their boards. Initially, women were against this as they wanted to be chosen on merit. They are now increasingly positive. The law hasn't really been implemented yet but we do need quotas."

**Female private sector CEO, expat, UAE**

"Quotas are a sensitive issue. They are seen by many as discrimination. There is a localization [nationalization] policy called Saudization. At first, there was a negative reaction to this. We are now lobbying for women in the localization space but we are not calling for quotas as these can lead to tokenism."

**Female private sector executive, citizen, KSA**

"Yes [we need quotas], to drive the change and to represent the population distribution. Also women in the GCC are very well educated."

**Female public sector senior manager, expat, UAE**

## Study finding 5

# A look at the barriers

According to the ILO report *“Women in business and management: gaining momentum in the Middle East and North Africa,”*<sup>4</sup> much like elsewhere in the world, women in the region encounter barriers to reach top positions in business and management. This was reflected in the Deloitte and 30% Club GCC Chapter study findings, with at least one female leader having personally experienced attitudinal barriers.

The barriers most frequently mentioned in the survey were related to:

- Mobility: Women’s willingness or freedom to travel for work.
- Family: The challenges or pressures associated with the role of being a wife and/or mother.
- Bias: Unconscious and conscious bias based on cultural influence.

In terms of barriers, travel emerged as a key issue, although with divided opinion on to what extent it can impact on a woman executive’s career. Some respondents argued that women from the region face some challenges when it comes to business travel, as

more traditional families require women to travel with a male companion such as a husband or brother, and often women may decline to travel on assignment or be replaced if unable to travel unaccompanied. Other challenges in relation to the issue of travel are the complications that arise for women during child-rearing years, as well as the difficulty some expatriate nationalities face in acquiring visas, thus hampering regional mobility. Due to the market size of the Middle East and GCC, executive employees are often required to cover many countries and travel extensively as well as put in long hours. Women were described as often saying no to positions because of this extensive cross-GCC travel, which is seen as too demanding. However, a sizeable number of respondents suggested that, on the contrary, travel and long hours do not constitute a constraint to women’s careers and are less of a problem for senior-level women, who accept that traveling and visiting clients is part of their jobs.

The issue of combining raising children with a career was also prominent among the survey feedback. Women face a number of challenges in this regard,

including family pressure not to return to work, and a lack of a support network among businesses to facilitate the return to work and reintegration into the workforce. The long hours required at executive level were also seen as conflicting with the pressure women face as spouses, homemakers or mothers.

Bias itself can be a barrier and even though respondents noted a preference for hiring women over men, this was felt mainly to exist in multinationals and that generally in the business world there is an unconscious negative bias against women, especially among local companies and family-owned businesses. Examples of unconscious bias perceived by respondents included:

- Women's jobs being regarded as less important than those of their husbands.
- Bias in selection and recruitment.
- Women being concentrated in supporting roles.
- Promotions impacted by maternity leave.
- Levels of commitment being questioned.
- Men being nervous of the competition generated by dynamic women.

Generally, opinions were mixed with some respondents perceiving significant challenges to women in terms of negative bias, and others claiming that women could be complicit in this bias in their attitudes to maternity, and that those women who are professional and hard-working would be respected and promoted.

There was felt to be no lack of female talent in the GCC, and when women were given the opportunity for education, they tended to seize the chance to step out of a restrictive cultural environment and to out-perform men. The challenge of juggling a career with managing a home and family was felt by these respondents to be no different than in the West, although some conceded that this challenge is accentuated in the Middle East where the emphasis tended to be still on the primary role of women as mothers and home stabilizers.



"The challenges are travel, male attitudes, but also the attitudes of women themselves."

**Female public sector executive, citizen, Kuwait**

"The Insurance Institute graduates women but many can't get jobs because of the perception that they will take time off for maternity."

**Male private sector CEO, expat, Bahrain**

"In order to scale your business, you have to cover more countries and travel more, put in long hours. Women say no to positions because of the extensive cross-GCC travel: They don't want to do it, it's too demanding."

**Female private sector head, expat, UAE**

"The corporate sector has a role to facilitate flexibility and an infrastructure for women to be able to go back to work after having children."

**Male private sector CEO, expat, UAE**

"Women feel that they are expected to do everything and perform on all fronts (professionally, socially, etc.) while men don't feel the same obligation."

**Female private sector head, expat, UAE**

"We had to replace our Group HR head, who is female, as she can't travel and visit our offices without taking her husband with her. To be a senior executive, you have to be able to travel to our offices and to interact with clients."

**Male private sector CEO, expat, Bahrain**



"In law firms the main obstruction is maternity. Women leave the workforce and then come back, and, although law firms are egalitarian, this holds them back in terms of re-assimilation and progression."

**Male private sector executive, expat, UAE**

"For example, 55% of students in this region studying for ACCA qualifications are female, but only 15% of ACCA members [attained after three years of work experience] in this region are female. The difference is caused because the vast majority of qualified women get married and then are not supported by their families in continuing to work."

**Male private sector executive, expat, UAE**

"The problem of balancing work and home life is no different from women in the West. All women have to make the choice between one or the other and this is a tragedy. This problem is exaggerated in the Middle East where the emphasis is still on the role of women as mothers and home stabilizers."

**Male private sector CEO, expat, UAE**

"I don't believe men and women have equal rights in practice. The culture still looks at women not at par. This poses pressure on women throughout their careers. The awareness of the woman's contribution to the household requires further emphasis."

**Female public sector executive, citizen, Kuwait**

"In Saudi Arabia, women are still not allowed to drive and this affects their mobility. Most women are still not allowed to work and regulations still impact the private sector. For example, women are not allowed to mix with men and this creates extra cost."

**Female private sector executive, citizen, KSA**

## Study finding 6

# Do expats have it better?

Although in recent years there has been a drive among GCC governments to encourage increased participation of nationals in the workforce, expatriate workers from across the globe continue to represent healthy percentages of the GCC job market. Survey participants were asked to appraise any perceived differences in how local and expatriate women react to the challenges mentioned previously. The responses were mixed, ranging from many feeling that there are no real differences in terms of how they manage their careers, to some arguing that expatriates have less pressure to stay at home and manage families, and even some perceiving nationals as being more able to navigate the environment in which they live and work, and use it to their advantage.

Certainly the picture is mixed but can be summarized in the following points.

Expatriate women were generally perceived by respondents as:

- Enjoying more of a partnership with spouses who share household and child-rearing duties, thus giving them greater flexibility in their careers.
- Frustrated due to their perceptions of their own culture giving them more freedom and value.
- Challenged by their transnational status.
- More flexible in their approach.
- More willing to return to work after maternity leave and less guilt-ridden at doing so.
- More ambitious but not enough to want senior roles.
- More motivated to earn high salaries to send money back home.

GCC women nationals were generally perceived by respondents as:

- Better able to negotiate the environment in which they live and work and use it to their advantage.
- Having access to more opportunities than expatriates.
- Having a firm drive, greater commitment and dedication to their careers.
- Regarded by their spouses as responsible for the home but less susceptible to role conflict as more used to leaving children with nannies and having home support.
- Having greater access to government support.

Male and female nationals tended to view the subject as more nuanced, believing that comparisons could not be drawn as it varied from individual to individual. Expatriate men and women in contrast perceived expatriate women as having more freedom and less constraints in their approach to career.

Some respondents felt that there were no real differences between GCC nationals and expatriate women in terms of how they manage their careers and that it depends on the personalities of individual women and on the organizations in which they work. These respondents noted that women with a sense of drive and independence and who are well paid would be more likely to move up the hierarchy regardless of whether they were a GCC national or an expatriate.



“Differences between expatriates and women nationals depend on the organization. We prepare both men and women for international assignments and skills. It is good to have a mixture of nationals and expatriates; it all depends on individual competence. If nationals are competent they will not feel threatened by expatriates.”

**Male private sector CEO, citizen, KSA**

“There are pressures on women nationals not to get educated or a job, but women are struggling against this. Expatriate women do not have these pressures.”

**Female private sector CEO, expat, UAE**

“In the UAE, the culture varies from individual to individual. Women nationals seem more committed and to have less role-conflict than expatriate women as they are more used to leaving children with nannies and having maids. They are learning to work together though. Male nationals do tend to think that women are responsible for the home whilst expatriate women have more of a partnership with their husbands and men do more around the house and with children.”

**Female public sector CEO, citizen, UAE**

“Expatriate women are more flexible in their approach to take up a job after giving birth. What these women want to achieve is not a career, but rather to have a 9 to 5 job and be able to be back at work. Expatriate women are more ambitious than women nationals, but still not ambitious enough to become senior.”

**Male private sector CEO, expat, UAE**

“We as expatriate women have less boundaries, the mindset has less shame and less limitations. As an expatriate, you are more open due to the mere fact that you have gone far from home. It shows a different state of mind. Expatriate women are one step further in terms of being in a non-familiar environment; the state of mind is more prepared to be out of the comfort zone. There are also less cultural influences, more freedom.”

**Female private sector head, expat, UAE**

## Study finding 7

# From a safe public sector toward entrepreneurship

Traditionally the public sector in the GCC has been regarded as offering more favorable working conditions for GCC citizens, with the wide-ranging perceived benefits including job security, better pensions, pay and holidays, and greater work-life balance. This is reflected by ILO statistics that show that in Saudi Arabia and Bahrain, to cite two examples, almost half the employees in the public sector are women<sup>11</sup>.

In the Deloitte and 30% Club GCC Chapter study, although the public sector emerged strongly as the favored employer for women for reasons cited above, it was noted that in senior positions in the public sector, women were felt to work just as hard if not

more than their male counterparts, and needed to be flexible, travel frequently and clock up long hours. One respondent felt that the public sector provided few opportunities for women to rise to higher level positions unless they were able to travel, and that it tended to cater for the less ambitious, be they men or women.

Notably, respondents felt that younger women, as well as older women returning to the workforce, are beginning to perceive the private sector as more favorable. Additionally, an entrepreneurial spirit was identified as emerging in the region, which is drawing some women away from a safe public sector career into the world of business.



"The hours are too long in businesses for many women and so they tend to join the public sector."

**Male private sector CEO, expat, UAE**

"Governments give relatively good positions and salaries with less working hours, but in top positions, women work just as hard if not more than their male counterparts."

**Male private sector CEO, expat, UAE**

"Culturally in Kuwait, yes [there is a preference for public sector employment]. And this is not limited to females only, as the public sector provides better timings and benefits to employees."

**Female public sector executive, citizen, Kuwait**

"The public sector is regarded as more secure, as well as guaranteeing a pension and providing more holidays. There are more women in the public sector in the UAE but women are also starting their own businesses as well. In the private sector in the UAE there is still an unconscious bias amongst men, and it is therefore not as attractive for women. We need legislation governing the private sector in terms of pensions, holidays and working hours. This is especially the case in family businesses where women tend to occupy administrative roles."

**Female public sector CEO, citizen, UAE**

"Many women prefer jobs in the public sector because of the set hours, especially if they are married. Younger women, though, who are single, often prefer to go to the private sector; and they 'go for it', working long hours and traveling. Older women returning to the workforce can again work long hours and travel as their family commitments are less."

**Female public sector executive, citizen, KSA**

"For the last 20 to 25 years, women wanted to work for government for work-life balance, but then about five years ago they started to be more willing to join private companies in admin, finance and banking. For the last three years, acceptance of private company employment is increasing."

**Male private sector executive vice-president, citizen, KSA**

Beyond the obvious contrast to the public sector in terms of benefits offered, the private sector was regarded as being less attractive to women for a number of reasons. Among these was the tendency for women's roles to be concentrated in supporting roles, such as administrative and secretarial positions. Additionally, a number of private sector careers involve client-facing duties, which, due to cultural reasons, are not acceptable to some women or their spouses.

Overall, it was felt that progress in terms of widening career opportunities for women had been made in most sectors in the GCC, and especially in the finance and service sectors. Respondents tended to agree that women are more available now for certain jobs (such as banking, human resources, marketing, health care and risk management) and that even traditionally male occupations such as aviation, the military and engineering are also opening up to them.

It was felt that generally women progress more in privately family-owned companies where the head of the family understands their capabilities and supports their progress. Some real change has been observed in this domain with fathers bringing their daughters onto boards and into CEO positions, although in some parts of the GCC, such as Saudi Arabia, family businesses were seen as isolated from this trend. In professional services firms, the main obstacle was perceived as maternity, with the pipeline of women from entry level to partnership positions felt to "leak" significantly due to this; women were also felt to gravitate towards roles which give them more flexibility or predictable hours.

Respondents mentioned that industries not only had to be inclusive of women but that they also had to be attractive to the women themselves, and that certain industries, such as oil, gas and construction were not attracting qualified females.





## Study finding 8

# Is a cultural shift taking place?

The past few decades have witnessed significant change in the countries of the GCC fueled by an economic boom. This development has had wide-ranging impact, including greater access to education for women and subsequently greater participation of women in the economy. In terms of higher education, for example, some GCC countries actually register higher enrollment rates among women than men. Survey respondents noted that although the countries in the GCC remain committed to their national identities and values, such as family bonds and parental guidance, a cultural shift is taking place as a result of the improvement in education and greater pursuit of it, as well as families becoming more supportive of women's literacy than in the past.

Beyond greater support for women's education, another trend was pinpointed by respondents, which indicates a cultural shift taking place. This relates to the changing economic dynamics of families, with greater numbers now faced with the need for two incomes to pay for private schooling of children. This has led to a greater level of partnership between husbands and wives than in the past. For example,

women can now travel and do things apart from their husbands, and husbands are encouraging their wives to work with many now actively seeking a wife who wants to work and help support the family. The issue of traveling accompanied by a spouse is also seen as dependent on individual family attitudes and personal levels of piety, with many women now regarding traveling and meeting clients as part of the job. However, respondents cautioned against generalizing cultural attitudes in the region or per country, as cultural nuances were felt to vary even within different families.

Even though a cultural shift was perceived, a number of respondents suggested that tradition still plays a strong role in many women's lives with pressure to stay home rather than work, or to marry at an early age. Additionally, marriage and divorce laws are structured so that women may accept to stay married to secure their financial stability. Within marriages, even though women may be required to be supportive in terms of having an income, their jobs can be regarded as less important than that of a husband.



"This generation is very international, with the older generations this was not the case."

**Male private sector executive, expat, UAE**

"In Saudi Arabia, things have changed 180 degrees in terms of education and university; families are now pushing women to get degrees. The universities here are as good as in the West."

**Female private sector executive, citizen, KSA**

"The new generation is very ambitious and affirmative. They are willing to challenge the norm."

**Female public sector senior manager, expat, UAE**

"Education is different today; we have global technology so we are learning from the world."

**Female public sector CEO, citizen, UAE**

"In the UAE, there is less pressure for women not to work. There is a change in thinking about female labor market participation. The issue was cultural and family pressures but families are now changing the discussion around child-care. Most families need an additional income."

**Female private sector CEO, expat, UAE**

"The GCC economy and trade have evolved over the last few years to give women in Dubai, Kuwait and even Saudi Arabia, more involvement. We are increasingly seeing more women in politics and government; education has played a key role as equal opportunities and scholarships are offered to both men and women."

**Male private sector CEO, citizen, KSA**

"Overall, women in the GCC are facing a cultural dilemma that prevents them from dedicating their time and effort to find a job. However, in the longer term of 10 to 15 years, it's expected to increase."

**Male private sector executive, citizen, Oman**

"Families are increasingly supportive of working women as there is a need for two incomes in the UAE. They have access to affordable nannies and maids and there are now more creches in both the private and public sectors. Younger women are having fewer children. But men still think women are responsible for the home and we need to change this mindset."

**Female, public sector CEO, citizen, UAE**

## Study finding 9

# A new generation, a new way of thinking

The majority of respondents, both men and women, felt that the younger generation of women was making great strides in a number of industries and that this younger generation of women was more ambitious, harder working and generally more competent than their male counterparts.

While in the West women are helped by a network of state support, including amenities such as crèches, within the GCC an alternative form of support, in the form of a good supply of affordable live-in domestic help, is seen as facilitating the ambitions of this new generation of women. Such women were generally described as very strong and as capable of overcoming any perceived challenges.

Younger men and women were also felt to be less hide-bound by tradition and hence there are more two-income families and couples who limit the number of children.

Some respondents also felt that there were clear differences between the expectations of Gen Y (those born between the 1980s and 2000) and those of the

previous generation: Gen Y was variously described as wanting short-term employment, many jobs in their lifetimes, and perceiving jobs as stepping stones to new jobs or careers or promotion.

One respondent felt that older women are often supportive of the younger generation and are determined to help them so that they do not have to face the same challenges as their mothers. The younger generation was also felt to have more exposure to different global influences and fewer frustrations; hence they are more educated and liberated.

It was also suggested that younger women are more self-confident in the way they present themselves and more demanding in terms of wanting to be developed, career planning and meeting clients. They are also seen as having very different attitudes and skills from the previous generation, such as resorting to innovation when faced with their needs not being met. Work-life balance was still regarded as a challenge because of family pressures, however.



"Young women are very strong and are overcoming the odds, in spite of resistance. Young women have a can-do attitude and are ambitious and energetic. As technology makes routine things easier, and quicker, many of the complex tasks such as relationship-building will play to women's strengths."

**Male private sector CEO, expat, UAE**

"Ministries are now running workshops on women's issues and Gen Y has very different attitudes and skills. Work-life balance is still a challenge. There are many social pressures from families but the ambitious minority makes a plan."

**Female private sector executive, citizen, KSA**

"Younger women today are more ambitious and focused on their careers."

**Male private sector COO, expat, UAE**

"The older women are actually supportive of younger generations so that they don't have to go through the same challenges."

**Female private sector head, expat, UAE**

## Study finding 10

# Leading by example

Although individual examples of best practice among companies were generally thought to be lacking in the region, respondents were able to more easily identify specific countries that were setting an example and making progress in terms of women's advancement. Kuwait, for example, was commended for having a tradition of independent women, and for more recently witnessing younger women nominating themselves for elections.

The UAE emerged as the most noted for the commitment of its leadership to women's advancement, and for being the leader in the region in terms of women's education, health and politics and of women's representation in the workforce. The government was felt to be working hard on these issues. The UAE constitution guarantees equal rights, and women were perceived to be moving to higher levels in all sectors, including politics, the diplomatic service, aviation and law, to name just a few. The UAE

was felt to be committed to gender diversity, which has opened the door to women, who are now exposed to different cultures and different ways of doing things.

Although Saudi Arabia is traditionally seen as the most conservative nation in the GCC, traditionalism, here, is still perceived as varying from family to family to the extent that small steps in the empowerment of women were being made. On a national level, however, substantial improvements have been made with regard to women's empowerment, including the issuing of a decree in 2011 that allowed women to participate as voters and candidates in polls, and to become members of municipal councils and the Shura Council (the country's royal advisory committee). Furthermore, in 2013 King Abdullah appointed 30 women to the country's Shura Council, and introduced an obligatory quota of 20% female participation.



"Women in the UAE are lucky because our leaders are committed. We are the leaders of women in the region in education, health, politics and the workforce. The government is working hard on this and women will have good opportunities moving forward. Our constitution guarantees equal rights and women are moving to higher levels all the time. There are lots of women in all sectors: Politics, diplomacy, aviation and justice are just a few."

**Female public sector CEO, citizen, UAE**

"The UAE has some impressive female ministers and top-level women in the government and public sector. I am deeply impressed by their knowledge, competence and self-confidence. There is no lack of female talent in the Middle East."

**Male private sector CEO, expat, UAE**

"In Saudi Arabia, we are preparing some women for factory jobs, and women engineers are moving from office jobs into the field. Legal studies were once off-line to women, but in the last 20 years, women are now allowed to appear in courts as lawyers."

**Female public sector executive, citizen, KSA**

"In Saudi Arabia, things have changed 180 degrees in terms of education and university; families are now pushing women to get degrees. The universities here are as good as in the West. Since King Abdullah, who died recently, helped women when he came to power, ministries are now running workshops on women's issues."

**Female private sector CEO, citizen, KSA**

# Looking ahead

The ILO states that it is “undeniable that the MENA region is undergoing significant changes”<sup>11</sup> and that long-term stability and growth for the region hinge upon the creation of meaningful work for all.

According to the report *“Women in business and management: gaining momentum in the Middle East and North Africa,”* “On-going developments may also improve prospects for women to enter the labor force and reach top positions in management and business leadership. Demographic, economic, and technological trends together with changes in national employment policies across the region represent opportunities for more equality between men and women. In addition, the growing talent and capabilities of women with their increased levels of education can be of tremendous benefit to companies and organizations. It is, nevertheless, important to stress that capitalizing on these opportunities for greater gender dividends hinges upon gender sensitive legislative and social and economic policy frameworks”.<sup>11</sup>

In the Deloitte and 30% Club GCC Chapter study a large proportion of respondents felt that, although there might be an increase in the number of women on boards and in senior positions in the next five years, any increase would be small. Reasons given for this cautious forecast included a scarcity of qualified women, cultural pressure, lack of role models, mentoring and networking opportunities for women, and lack of strategies in place for this to happen. Generally, though, it was felt that small steps were being taken and that for this reason some increase could be expected. Additionally it was felt that as women became more qualified and experienced, more momentum would be gained and that the long-term outlook was more positive.

Examples of best practices suggest the importance of the following for organizations to increase the numbers of women in leadership roles:

- Commitment from the top.
- A strategic approach to integrate gender diversity.

- A longer-term view of how gender diversity can bring gains.
- Building a pipeline of female leaders.
- Mentoring, coaching, development and sponsorship.
- Flexibility of working hours and arrangements.
- Gender diversity target-setting practiced by HR.
- Gender inclusion as part of the company culture.

Although best practices among businesses are essential to achieve gender diversity at leadership level, executives surveyed for this study felt strongly that efforts need to be made beyond corporate culture and strategy to ensure that more women are able and committed to becoming future leaders. Even though governments have taken steps to show support for women as leaders, it was felt that local education systems needed to be improved and a greater cultural shift to take place before a suitable pipeline of future women leaders would emerge. Effectively, this places the onus on the private and public sectors to work together to foster real change and improvements in gender balance at leadership level.

Based on this report being issued to promote dialogue, it is pertinent to summarize the findings into questions from which such a dialogue can be initiated. These questions include:

- Given the diversity in the levels of progress, and in opinions amongst leaders about the empowerment of women in the GCC, does it make sense to discuss strategy for women's empowerment for the entire GCC or should we rather be giving consideration to

- different strategies for different countries?
- How can organizations build on or leverage the momentum shown at governmental level that seeks to empower women as leaders in public spheres?
- Should governments intervene more directly in guiding policy within the public and private sectors in order to promote greater gender equality at executive level?
- Are we talking to the right audience? For real progress, shouldn't we begin by engaging business leaders, be they male or female?
- How do we encourage business leaders to commit strategically to women's empowerment?; should we begin by developing a strong business case which highlights the positive impact women's empowerment can have on business results?
- Given the skepticism about quotas, shouldn't we rather be encouraging businesses to set their own targets for representation, inclusion and succession?
- What can we do to facilitate the equipping of leaders with inclusive leadership skills?
- What can we do to highlight global leading practices to ensure women's inclusion and their positive impact on business?
- Could we be doing more to monitor progress over time?

Naturally, the question remains whether dialogue can translate into action, but with known financial benefits to business and national economies from women's increased participation in leadership, the imperative to act is clear.

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### Endnotes

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**Acknowledgments**

We would like to thank the following people for their support:

- Dr. Linda Human  
Global Diversity and Inclusion Director,  
Deloitte Touche Tohmatsu Limited
- Imelda Dunlop  
Executive Director, Pearl Initiative
- Jumana Abu-Hannoud  
Co-founder, 30% Club GCC Chapter
- Helen Assaf  
Editor

- Mark Dunn  
Partner, Audit, Oman, Deloitte
- Hani M. Khoury  
Partner, Enterprise Risk Services,  
Saudi Arabia, Deloitte
- Ehsan Makhdom  
Partner, Audit, Saudi Arabia, Deloitte
- Rami Wadie  
Partner, Enterprise Risk Services,  
Kuwait, Deloitte

**Project support**

Mira Hannoush – Deloitte



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