

One Step Ahead of 2011

A New Horizon for Working Women

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Foreword

Long-term success in today's rapidly changing global business environment presents companies and their employees with new challenges to achieving high performance. Women will need to understand what **new skills** they need to stay relevant and thrive, and management must understand what will motivate and matter to tomorrow's workforce.

In this report, *One Step Ahead of 2011: A New Horizon for Working Women*, we consider the changes on the horizon for tomorrow's workforce—in particular, for women around the world. The research seeks to pinpoint what working women—and men—will need to do to adapt to globalization. It also explores key differences between the genders and assesses people's willingness to make the necessary adjustments.

As stewards of inclusion and diversity at Accenture, we welcome what lies ahead. Only by opening ourselves up to new interactions with businesses and people around the globe can we hope to take advantage of the best the world has to offer—previously untapped sources of ingenuity and new ways of doing business. It is our firm belief that change is the

wellspring of innovation. It makes us reexamine the effectiveness of our established approaches to doing business and to managing talent, and it adds new vigor and purpose to our personal and professional lives.

We recognize that change brings uncertainty, but it also brings great opportunity. For women, this new era may sweep aside many of the old rules that might have impeded their success in the past. Now, they must take stock of their own abilities and actively seek out the training and new skills that will broaden their prospects for 2011 and beyond. For the businesses that employ them, it is time to assess their own gaps in current training and collaboration opportunities to understand what it will take to attract tomorrow's brightest talent.

The call has been sounded for all of us to step outside our comfort zones—to become more agile; to explore new models of doing business; to understand other cultures more deeply; and to embrace change for the opportunity it is dropping at our doors.



Adrian Lajtha
Chief Leadership
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About this report



What is the multi-polar world?

Economic power is becoming increasingly dispersed around the globe as the so-called "triad" economies of the United States, Japan and Western Europe face growing competition from emerging markets that were not even considered players a few years ago. We refer to this phenomenon as the rise of the multi-polar world.

As the multi-polar world continues to take shape, emerging-market multinationals, such as those in China, Brazil and India, are expanding at a speed and scale to make even the largest Western multinationals take notice. They have been expanding and acquiring new businesses at a rapid pace and, within the last year, nine emerging-market multinationals were added to the *Fortune* Global 500.

Based on Accenture's extensive original research, we have concluded that the multi-polar world is characterized by increased economic interdependence across five key dimensions: talent, new consumers, capital, resources and innovation. Talent—the men and women who will comprise the workforce of 2011—is the focus of this report.

Accenture undertook research for *One Step Ahead of 2011: A New Horizon for Working Women* to gain a better understanding of how prepared women and men feel to meet the challenges of the rise of the multi-polar world, a phenomenon in which traditional centers of economic power are being dispersed more widely around the globe (see sidebar, *What is the multi-polar world?*). We also sought to determine what skills tomorrow's workforce already has and what skills they could improve to be better equipped for a new era of globalization.

We surveyed 4,100 business professionals from medium to large organizations between December 2007 and January 2008. The online survey was conducted across 17 countries, with approximately 400 respondents in the United States; approximately

300 each in France, Germany, Italy, Spain and the United Kingdom; and approximately 200 each in Australia, Austria, Brazil, China, India, Ireland, the Netherlands, Norway, South Africa, Sweden and Switzerland. Results were weighted so that each country had equal impact on the global findings, regardless of the number of respondents in any country.

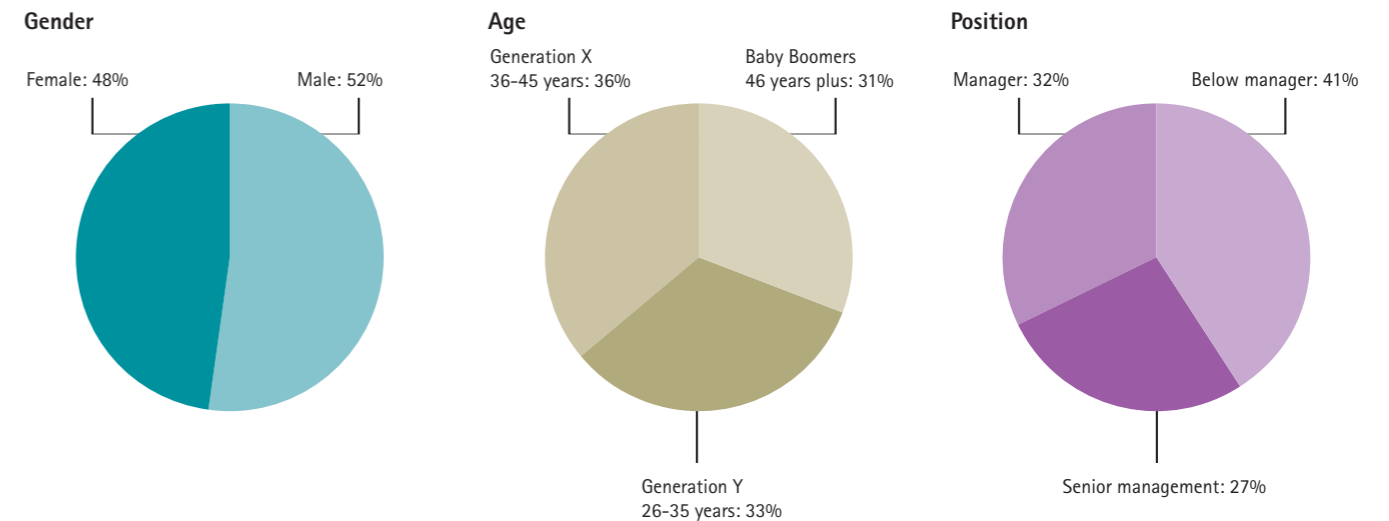
Respondents answered questions related to six skill categories—agility, social responsibility, inclusion and diversity, global skills, technology and business relationships. These questions looked at the respondents' perceived importance of the specific skill to success in 2011, as well as their readiness in that skill. While not intended to be exhaustive, the six factors we identified were based on Accenture's extensive experience working with

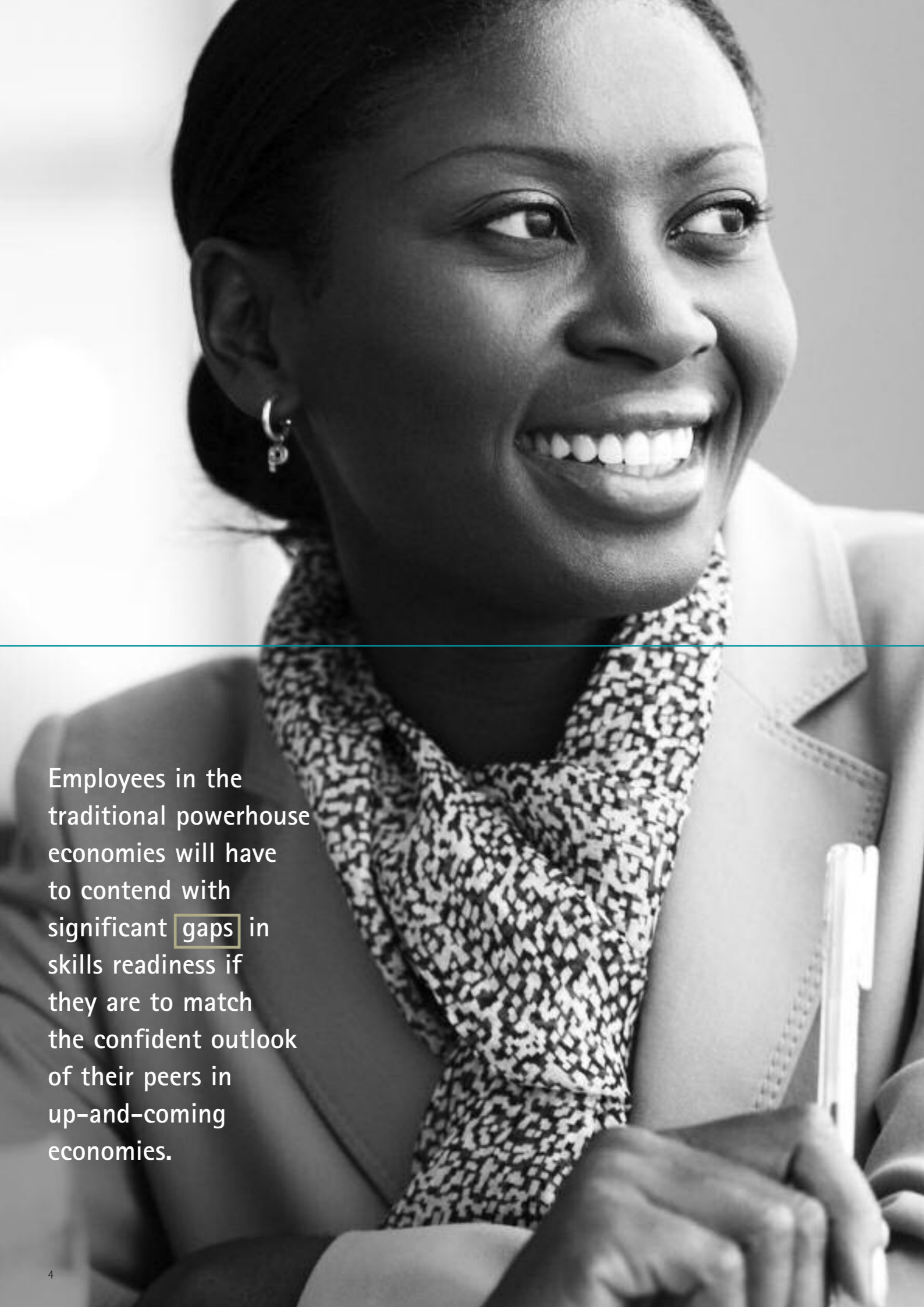
clients around the world as well as an understanding that comes from working as a global organization in the emerging marketplace.

Responses to these questions provided the basis for a "skills readiness index," which we discuss in greater detail in the following sections. Additionally, respondents were asked a number of questions related to the career advancement of women and men and factors most important for business leadership.

Respondents were split fairly evenly by gender and were balanced by age and level in their organizations (see Figure 1). Throughout the report, we highlight areas where we found strong differences in results among different respondent categories.

Figure 1. A breakdown of respondents by gender, age and position





Employees in the traditional powerhouse economies will have to contend with significant **gaps** in skills readiness if they are to match the confident outlook of their peers in up-and-coming economies.

Executive summary

One Step Ahead of 2011: A New Horizon for Working Women provides a snapshot of how tomorrow's workforce feels about the changes to business that will accompany the increasing leveling of economic power globally, which we refer to as the multi-polar world.

This report covers two primary areas: the current landscape as well as skills readiness across each of the 17 countries represented in this report.

In terms of the current landscape, both women and men share concerns about their readiness to succeed in 2011. In fact, less than half of either gender feels equipped to succeed three years down the road. We noted key differences across geographies as well: Respondents in emerging markets rated themselves as most prepared for doing business in 2011, which means that employees in the traditional powerhouse economies will have to contend with significant gaps in skills readiness if they are to match the confident outlook of their peers in up-and-coming economies.

For our second area, we asked respondents to consider their skills readiness in six categories. Here, skills readiness represents the respondents' perceived importance of the specific skill to success in 2011, as well as their preparedness with regard to that skill.

We found that overall, women ascribed greater importance to, and indicated greater readiness in, a number of key skill areas than men did. Specifically, they expressed a heightened propensity to cultivate skills related to inclusion and diversity, social responsibility and global skills.

Technology is the skill that women overall deemed most important to success in the future and the one they are most willing to embrace as an

enabler of new business models. In fact, technology skills readiness is an area of strength for both genders, while building business relationships needs renewed focus. More than half of female respondents expressed uncertainty about their ability to foster global business relationships over the next three years.

The sections that follow explore each of these findings in greater detail, with examples that highlight notable differences among countries, genders and age groups. Following our global findings, we provide summaries of the results for each of the 17 countries surveyed.

The landscape

A new era of **globalism** is already upon us. Interactions with others beyond our borders affect the majority of working men and women, regardless of whether or not they actually work for multinational corporations.

We found that while only 39 percent of respondents worldwide work for organizations with international operations, 69 percent of respondents have working relationships outside of their country. Whether these relationships are with suppliers, employees or customers, an understanding of different cultures and potentially different ways of working will have a powerful impact on any business's ability to compete in the near future.

Against this backdrop, we asked respondents how well equipped they currently feel to succeed in the global business environment of 2011. Less than half of the women (43 percent) and the men (47 percent) said they currently feel prepared to succeed in the global world of the future.

Geographical, gender and generational differences abound

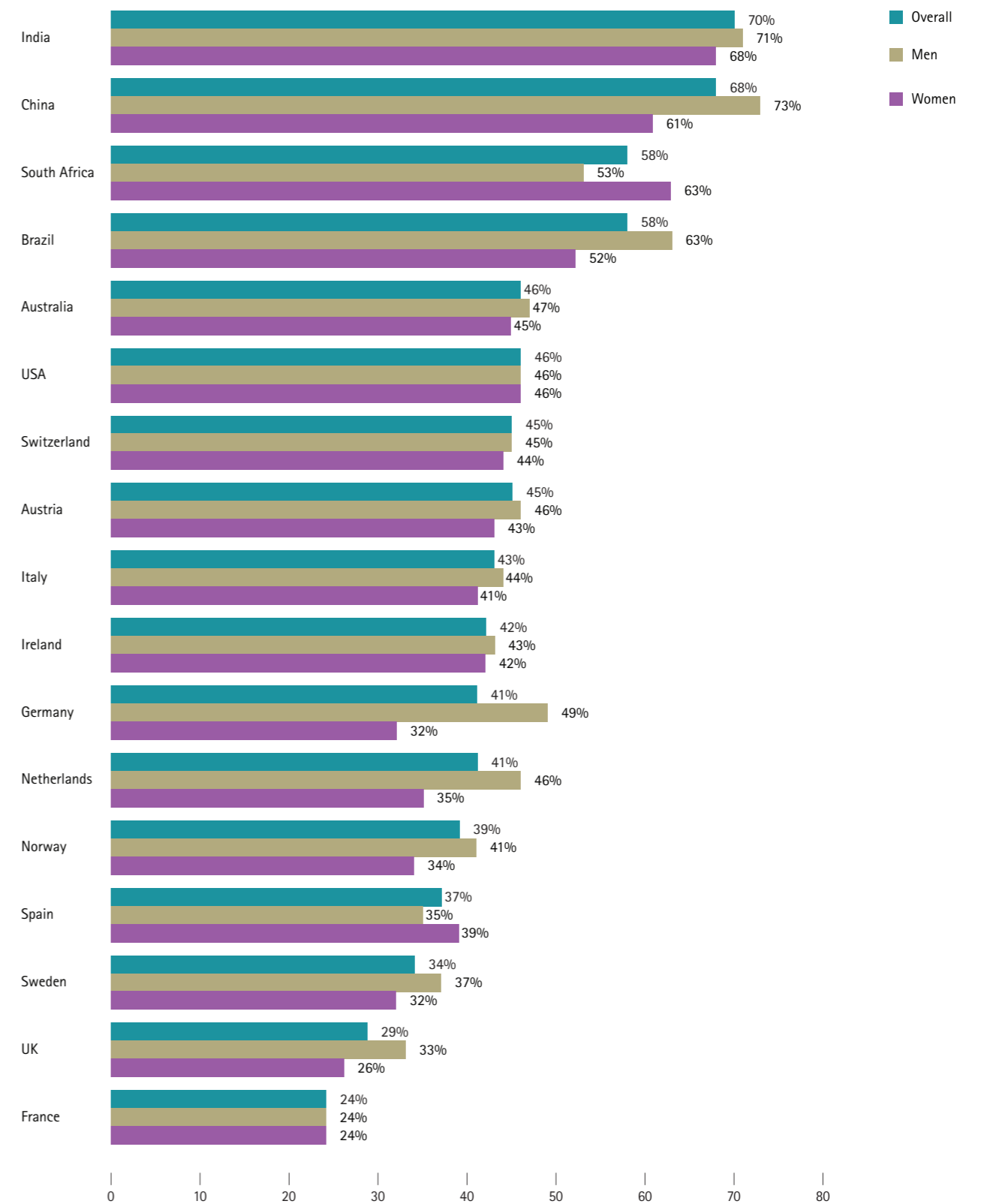
The feeling is not consistent across geographical boundaries, however. For example, we found some truly striking differences among individual countries: Professionals of both genders in several key emerging markets were more likely to say they feel equipped than were their counterparts in developed markets. Specifically, the majority of respondents in India, China and Brazil—70 percent, 68 percent and 58 percent, respectively—said they feel equipped to succeed in the global business world of 2011. On the other hand, respondents in the United Kingdom and France were least likely to say they feel equipped (29 percent and 24 percent, respectively).

We also found some significant differences between genders within individual countries (see Figure 2). For

example, in China, Brazil and Germany, men were far more likely than women to see themselves as equipped for success in 2011, with gaps of more than 10 percentage points between the sexes (12, 11 and 17 percentage points in the three countries, respectively). In South Africa, however, 63 percent of women feel equipped to succeed, compared with 53 percent of men.

Our research also uncovered attitudinal differences among generations. Younger respondents were more likely than older respondents to say they feel equipped for success in 2011. Specifically, almost half (49 percent) of Generation Y respondents (those between 26 and 35 years of age) and 45 percent of Generation X respondents (those between 36 and 45 years of age) said they feel equipped for success in three years, compared with 41 percent of Baby Boomers—those aged 46 years and older.

Figure 2. How well equipped to succeed men and women across different countries feel



The skills readiness index



Today's workforces seem highly **attuned** to what it will take for them to be successful in the near future and to their own strengths and deficiencies in skills readiness.

Given the level of uncertainty that respondents expressed about their future readiness to compete, the need for a greatly augmented skill set—one that fosters new international relations; that values the diversity of perspectives that vastly different backgrounds will engender; and that is agile enough to adjust to rapid environmental and technological change—seems obvious. What is less certain is whether or not individuals feel they have the skills they need to succeed (see Figure 3).

To find out, we asked survey respondents to consider their skills readiness across six categories—agility, social responsibility, global skills, technology, inclusion and diversity, and business relationships—with skills readiness representing the respondents' perceived importance of the specific

skill to success in 2011, as well as their preparedness with regard to that skill.

Respondents used a 5-point scale, with 1 being the lowest score (least ready) and 5 being the highest (most ready). The responses were averaged for each country into an overall skills readiness score. Scores in the range of 4 to 5 indicate that the country's workforce is doing quite well in developing skills for 2011; scores between 3 and 4 indicate that the workforce has scored high in some areas of skills readiness, but low in others. Finally, scores below 3 signify that the workforce has real opportunities to improve its skills readiness for 2011. We also classified individual countries' skills readiness index scores into zones of "very ready," "nearing readiness" and "improvement opportunities."

Figure 3. Key skills for future success in an increasingly global business environment

Skill	Encompasses
Agility	Willingness to take on additional responsibilities and complexity
	Stretching beyond comfort zone
	Role versatility
Global skills	Relocating to another country
	Understanding that business culture is changing
Technology	Perceived readiness to succeed in global business environment
	Importance of leveraging new technologies
	Relationships managed by technology (e.g., blogs, e-mail, social networks)
Social responsibility	Willingness to learn and utilize new technologies
	Perceived importance of corporate social responsibility
Inclusion & diversity	Understanding and reducing environmental impact
	Understanding cultural differences
	Valuing diverse opinions
Business relationships	Embracing a culturally diverse team
	Global professional/social networks
	Willingness to travel to build relationships



Figure 4. Global average skills readiness score



Employees in emerging markets feel most ready

Overall, the global score for skills readiness is 3.7, indicating opportunity for improvement (see Figure 4).

However, as was the case when we asked how well-equipped respondents currently feel for 2011, respondents in emerging markets show significantly greater skills readiness than their counterparts in many developed markets (see Figure 5). That is, workforces in Brazil, China and India all scored above the global average and classify as very ready in terms of their skills readiness index scores. Brazilian women scored particularly well in the skills readiness index; their overall score of 4.2 is the highest among all the groups (male and female) in all countries. At the same time, employees in the United Kingdom, France and the Netherlands appear to have the greatest opportunities to improve their skills readiness.

The index scores indicate that workforces in traditional economic powerhouses, including the United States and the remaining Western European countries (many of which match the global average skills index score of 3.7), will have to contend with a significant gap to match their peers in the up-and-coming economies. The gap for employees in the traditional economic powerhouse countries may take on increased importance as competition for the most desirable jobs draws from a widened international talent pool.

Overall, we found that respondents' general perception of their readiness to succeed in the future (see Figure 2, page 7) correlates closely with their countries' skills readiness scores. In other words, today's workforces seem highly attuned to what it will take for them to be successful in the near future and to their own strengths and deficiencies in skills readiness.

The reason for this disparity among countries is likely due to the fact that our research was conducted against a backdrop of dramatic growth for emerging-market multinationals—companies from emerging economies with operations in more than one country. As described in the sidebar on page 3, emerging-market multinationals are expanding and acquiring new businesses at a rapid pace; they now account for 70 companies on the *Fortune* Global 500 list of the world's largest companies, up from just 20 a decade ago.

Emerging-market multinationals are innovative and nimble, and they give considerable attention to developing the workforces they need to deliver high performance. For the most part, they focus on talent management and developing inventive educational and training programs for their workforces. It may well be that their emphasis on education, innovation and technology boosts their employees' self-assurance and makes them feel better equipped

to handle new issues and challenges. In our experience, companies that seek to educate and inspire their workforces and make state-of-the-art education and training a top priority have the best chance for achieving high performance, whether they are in a developed or a developing economy.

The skills readiness index provides a snapshot of a more confident workforce in emerging economies. However, it is not really a matter of where a country comes out on the list. Rather, the real issue is: How can leading companies—whether in a developed market or a developing market—best energize, engage and inspire their workforces?

Figure 5. Individual countries' overall skills readiness

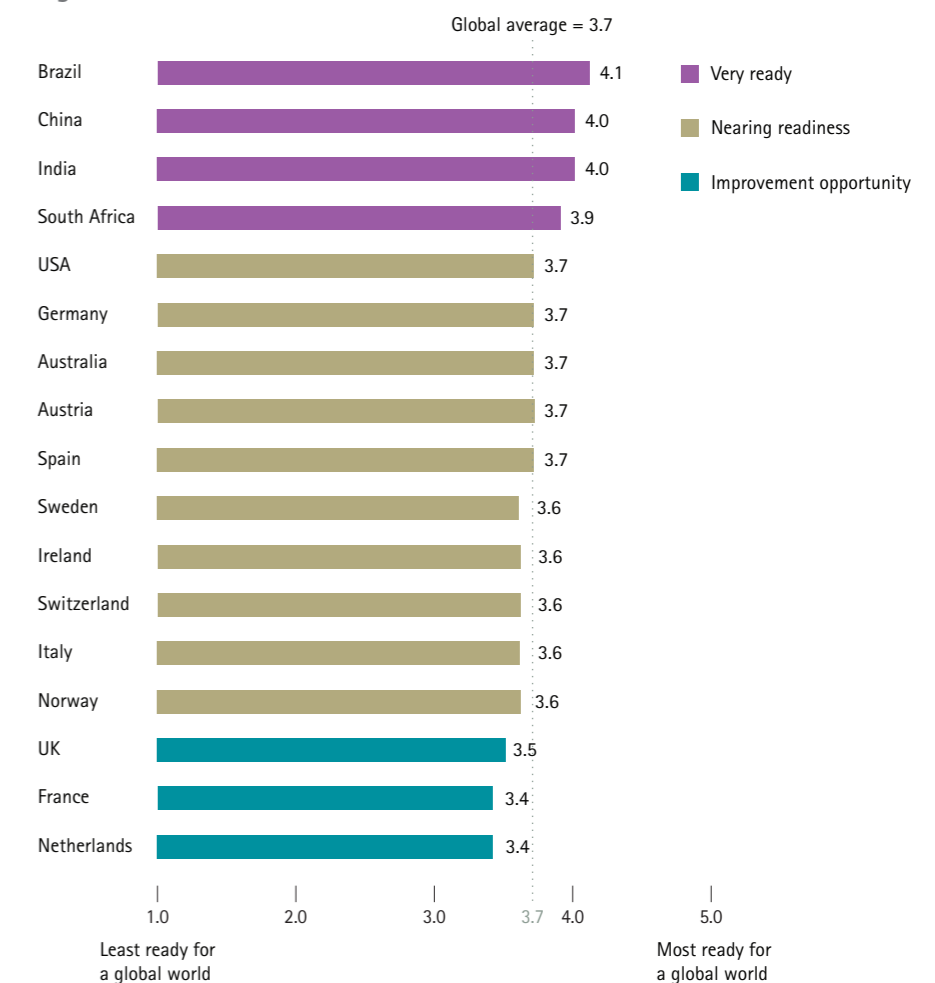
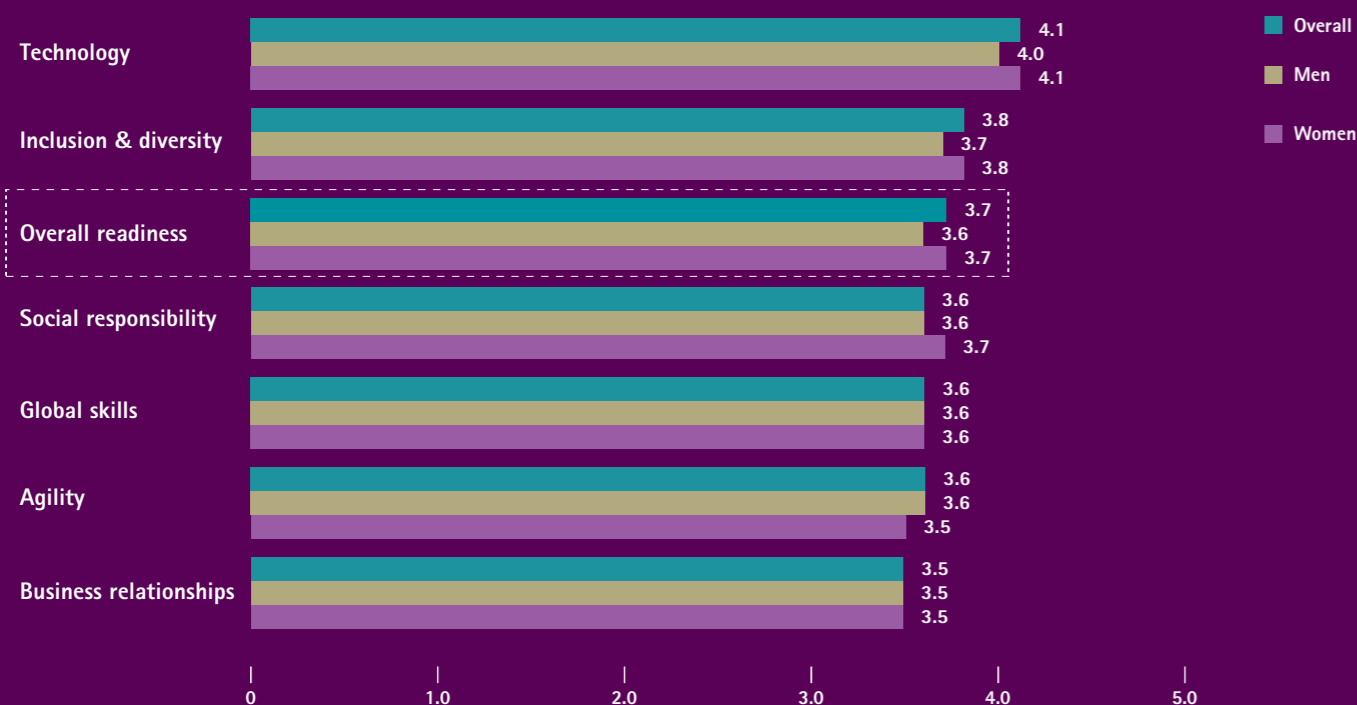


Figure 6. Women's and men's skills readiness index scores across six skill categories



A willingness to embrace new **technology** as an enabler of new business models is an area of strength for tomorrow's workforces.

Technology is the leading skill

Technology led the skills readiness assessment for both women and men. In this skill area, women's index score of 4.1 and men's index score of 4.0 were both genders' highest scores across all six skill categories (see Figure 6).

Fully 75 percent of women and 73 percent of men reported technology skills as being of high or very high importance to their future success and indicated strong readiness in terms of overall technology skills. Clearly, a willingness to embrace new technology as an enabler of new business models is an area of strength for tomorrow's workforces. Indeed, although workforces in the emerging markets of Brazil, China and India lead

the way in technology skills readiness, a remarkable 15 of 17 countries fall into the very ready zone for technology. Only the United Kingdom and the Netherlands fall into the mid-range category of nearing readiness when it comes to technology skills.

Additionally, more than eight in 10 women (83 percent) said they were willing to learn and use new technologies as a means of achieving future success. More than three-quarters (76 percent) of women forecasted a high degree of importance in leveraging new technologies, and two-thirds (66 percent) of women said they expect that relationships managed through technology will change significantly between now and 2011.

Women appear ready to thrive in a multi-polar world

Interestingly, women rated their skills readiness higher than men rated their own in a number of other important skill areas, including inclusion and diversity, and social responsibility.

For example, in the area of inclusion and diversity, women fall into the very ready zone in 10 countries, whereas men fall into the very ready zone in only four countries. Similarly, women in five countries were very ready in terms of social responsibility skills, compared with men in only a single country.

What we see happening in the skills readiness index could be a product of women's traditional paths to advancement. In our survey, women were noticeably more likely than men to rate their own ambition and drive as a top factor contributing to their professional success. Under pressure—internal or external—to prove themselves, women might have been expending more effort to amass the skills that will bring them future success. Certainly, women were more likely than men (54 percent versus 50 percent) to anticipate significant change in the culture of business by 2011.

The pressure to perform is a phenomenon that we see repeating itself on a global basis, as workforces in emerging market economies are being

conditioned to work harder to catch up to the established economic leaders. As these workforces become increasingly aware that the eyes of the world are on them, success becomes a matter both of personal prosperity and national pride.

The particular areas of strong skills readiness for women seem to mirror personal values. For example, women were significantly more likely than men to rate working for a company that is socially and environmentally responsible as important. Forty-seven percent of women saw making corporate social responsibility a priority as a critical skill for leaders in 2011, versus 39 percent of men. Likewise, 59 percent of women saw valuing diverse teams and opinions as critical for future leaders, versus 49 percent of men.

The one area where men scored higher than women in skills readiness is agility. Men were more likely than women to say they are willing to travel internationally to conduct business or build business relationships (54 percent versus 50 percent) and to consider relocating (42 percent versus 38 percent). Again, these scores reflect personal priorities: nearly one in four women (22 percent) cited the need to devote energy to their children and families as a top factor hindering their careers, compared with only 14 percent of men. For a notable number of women, family ties equate to career boundaries.

Building business relationships needs renewed focus

The area in which both women and men overall reported feeling least equipped for 2011 is in business relationship skills. The global average index score for business relationship skills readiness is 3.5, and only 57 percent of women and 55 percent of men overall reported feeling very ready for doing business in 2011 with regard to their business relationship skills.

In an indication that gender boundaries might be eroding, more than half of both women and men (58 percent and 61 percent, respectively) reported that men and women are equally effective at building professional networks that help advance their careers. However, among respondents who feel

there is a disparity in men's and women's abilities to build business relationships, twice as many respondents of both genders expressed the opinion that men are more effective than women at building business relationships (see Figure 7).

This finding is particularly striking, given that women are significantly more likely than men to place greater importance on having a global professional network and on having a global social network to succeed in 2011. Sixty-two percent and 58 percent of women, respectively, cited these factors as important, versus 58 percent and 54 percent of men, respectively.

In women's and men's attitudes toward business relationship-building skills, we again saw some marked disparities among countries (see Figure 8).

In China for example, nearly half (47 percent) of all respondents said they believe that men are more effective than women at building business relationships, versus only 15 percent who said they believe that women are more effective at building these relationships. In Austria, Sweden, Ireland and Norway, respondents overall were approximately three to four times more likely to say that men are more effective than women at building business relationships. Perhaps even more interesting, in these four countries, it is women themselves who are far more likely to consider men to be effective.

Results such as these indicate that despite increasing parity between the genders in all areas of their business lives, some vestiges of the era of male-dominated professional networks may yet remain.

Figure 7. Global perceived effectiveness of men and women at building business relationships

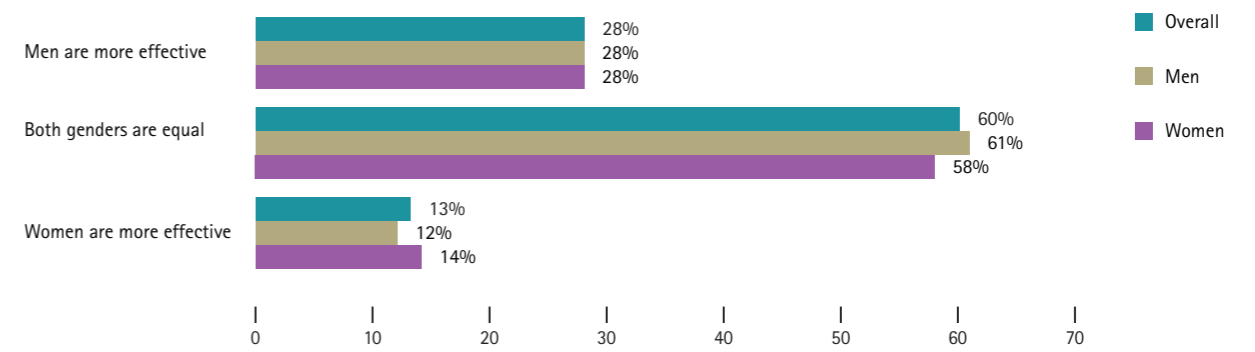
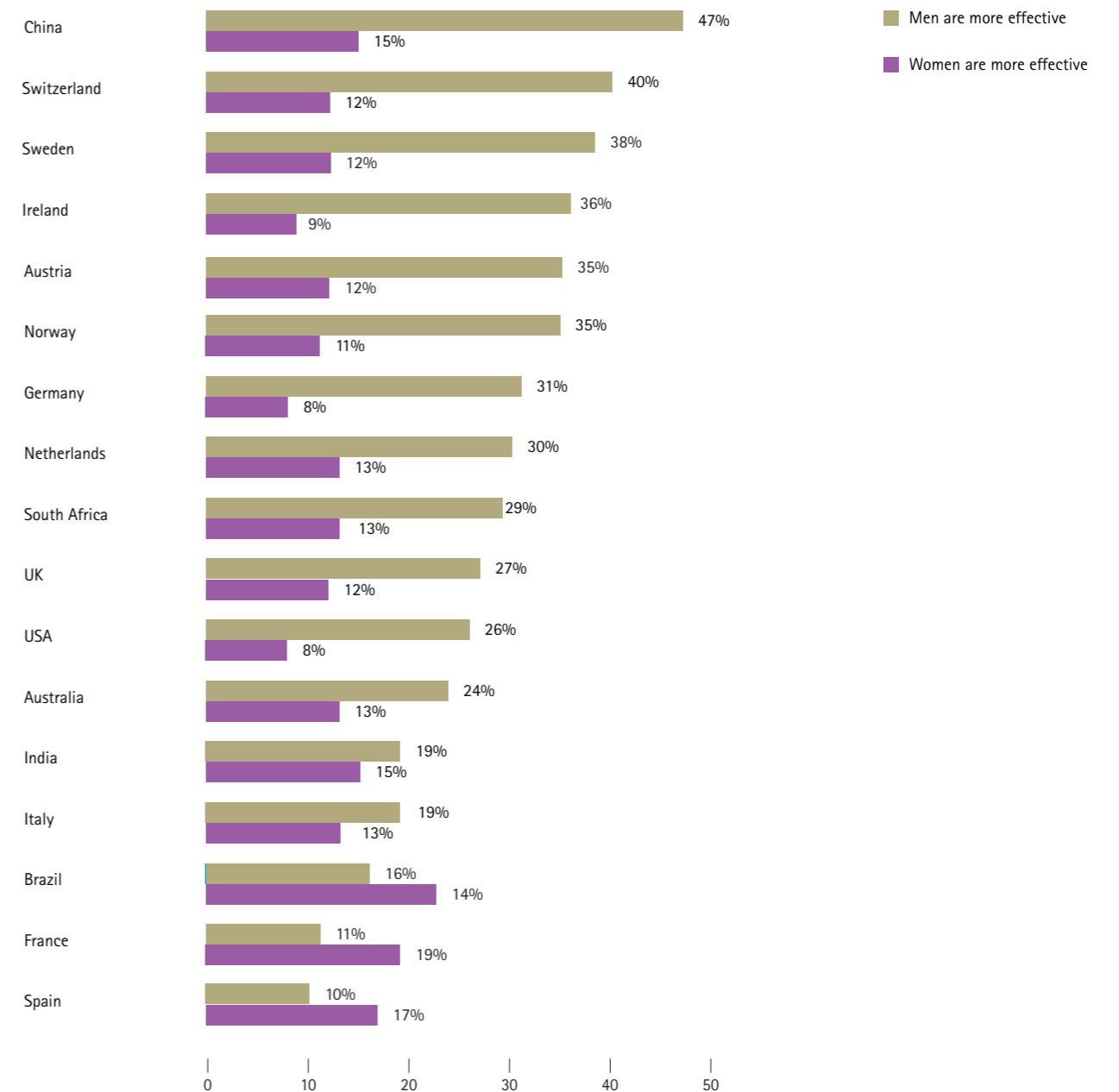


Figure 8. Individual workforces' perceived effectiveness of men and women at building business relationships



Women are significantly more likely than men to place greater importance on having a global professional network and a global social network to succeed in 2011.



Conclusion

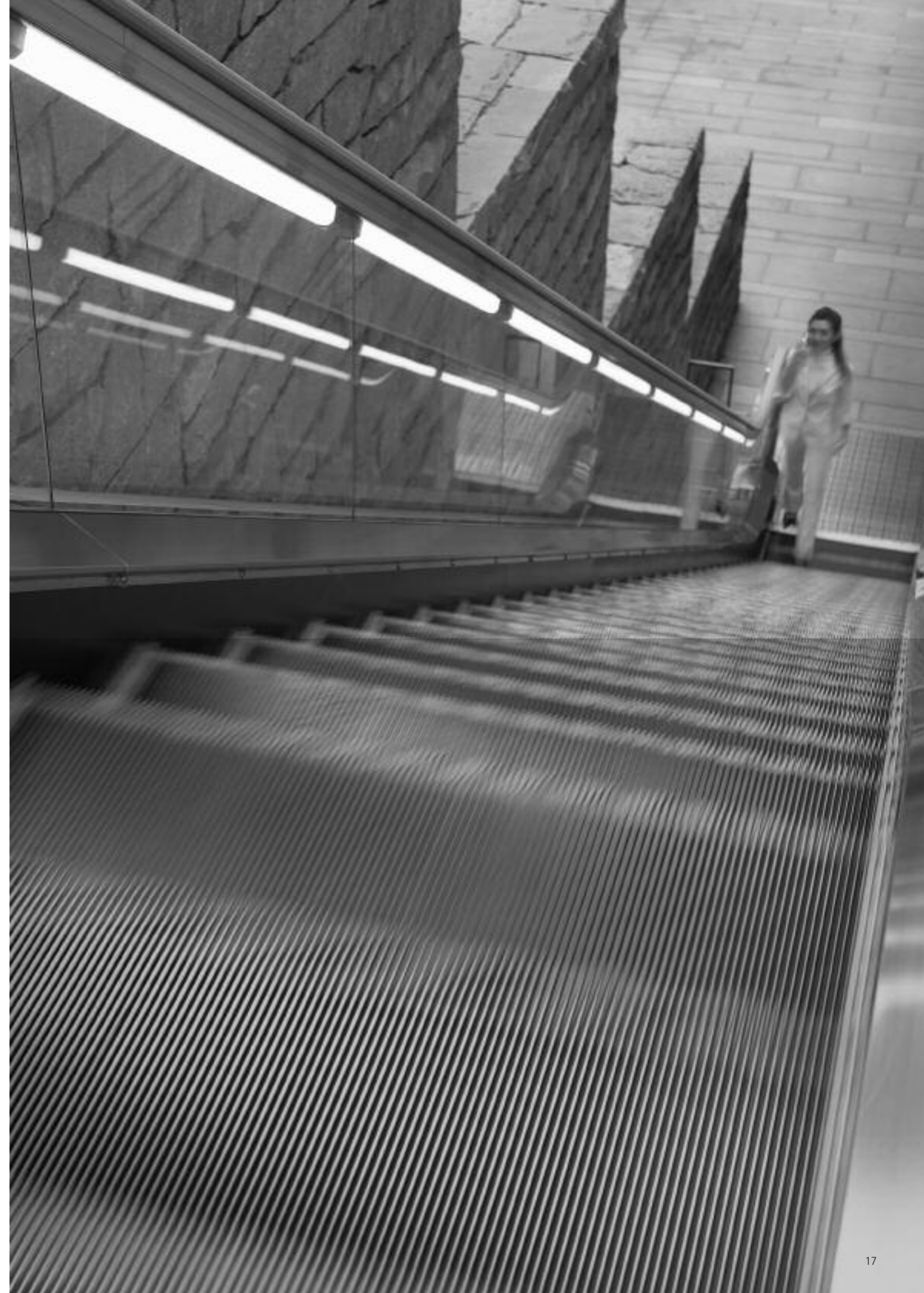
As global competition intensifies, we are entering a time of unprecedented opportunities and significant challenges in business.

To capitalize on the prospects being created by new markets and new consumers, established players and up-and-comers face pressure to augment the traditional skill sets and knowledge base of their workforces. Their ability to do so will continue to differentiate the high performers. As talent becomes more of a global commodity, it will be necessary for employers to provide an atmosphere conducive to developing and retaining good employees—regardless of their age, gender or nationality.

This research shows that men and women alike are concerned about what lies ahead; many feel inadequately equipped to compete in the global business economy of the future. Companies that succeed in this new environment will heed these concerns

and respond by exposing employees to different cultures and business contexts, creating global networks of expert resources, encouraging collaboration across boundaries, and offering diverse career opportunities and customized training to build a sustained competitive advantage.

The high-performing businesses of tomorrow will embrace the influx of new perspectives and new skills that come from a broadened talent pool and turn it into a competitive advantage. The opportunity exists for all to tap into the infinite potential of women and men from everywhere in the world.



Country profiles

Australia, Austria, Brazil, China, France, Germany, India, Ireland, Italy, the Netherlands, Norway, South Africa, Spain, Sweden, Switzerland, the United Kingdom and the United States



Australia

Less than half (46 percent) of Australian respondents currently feel equipped for 2011, with no significant differences between genders or generations.

Australia falls into the "nearing readiness" zone of our skills readiness index, with an overall index score of 3.7. Across skill categories, Australian women align with their female counterparts globally in terms of technology, agility, global skills and business relationships. However, Australian women scored higher than their female counterparts globally in the areas of social responsibility and inclusion and diversity (3.9 for Australian women in both cases, versus 3.7 and 3.8 global scores, respectively), suggesting these are areas of heightened importance for Australian women.

Australian women were significantly more likely than men to report having seen notable change in their business environment over the last three years (cited by 56 percent of women versus 47 percent of men) and to predict substantial change in the upcoming three years (63 percent versus 53 percent). Again, we see evidence that Australian women are attuned to the environment: they cited increased emphasis in business on the importance of reducing environmental impact as the top area of business change, whereas men believe fewer geographic boundaries to conducting business will be the area of greatest change.

Almost two-thirds (63 percent) of all Australian respondents believe that men and women are equally adept at building business relationships. However, there was a significant difference between the number who said they believe that men are more effective (24 percent) and the number who believe that women are more effective (13 percent). Interestingly, men were

nearly twice as likely as women—17 percent versus 9 percent—to say that women are more effective. Correspondingly, men were more than three times as likely as women—21 percent versus 6 percent—to say that not fostering professional relationships as effectively as possible is a top career-limiting factor for them. Men's relationship skills readiness index score of 3.3 and women's score of 3.5 suggest that business relationships may be the area most in need of skills building for Australians overall.

Austria

Overall, 45 percent of Austrian men and women said they feel equipped for the multi-polar world, with no significant differences between genders or generations. However, men were much more likely than women (56 percent versus 42 percent) to say they expect significant change to the business environment over the next three years.

Austria's skills readiness score of 3.7 puts it directly in line with the global average and into the "nearing readiness" zone. Also in line with global results, Austrian respondents (men and women alike) appear to be very ready in terms of technology, with an average skills readiness score of 4.0. Austrians scored higher than the global average in terms of business relationships skills readiness (3.7 versus 3.5 globally), but lower in the areas of agility and social responsibility (3.5 versus 3.6 globally, for both categories). Although both genders scored equally in terms of global skills and business relationships, Austrian women achieved higher skills readiness scores than men in inclusion and diversity, social responsibility, technology and—in a departure from global results—agility.

While men and women agree on the aspects of business that are most likely to change over the next three years, women were more likely to expect

significantly more emphasis on social responsibility, the environment (climate change) and diversity in business in the future. In addition, Austrian women were more likely than women in other countries to cite building global skills as important to success in the future (82 percent of Austrian women versus 69 percent of female respondents globally).

As we saw in other countries, more than half (54 percent) of Austrians believe that men and women are equally adept at building business relationships. Of those respondents who cited one gender as being more effective than the other at building relationships, nearly three times as many said they perceive men as more effective than said they perceive women as more effective. Here gender and age differences are apparent, with significantly more women than men believing that men are more effective at building business relationships (41 percent versus 29 percent).

Brazil

Consistent with their counterparts in other emerging markets, more than half (58 percent) of Brazilian men and women said they currently feel equipped for 2011. However, men were significantly more likely than women—63 percent versus 52 percent—to say that they are equipped to succeed. The research found no differences in opinion among the different age groups (Generation Y, Generation X and Baby Boomers).

In terms of overall skills readiness, Brazil's score of 4.1 puts it well above the global average of 3.7 and into the "very ready" zone. Brazilian women achieved an overall skills readiness score of 4.2—the highest of any gender or country breakdown—compared with a score of 4.0 for Brazilian men. In fact, women in Brazil scored higher than their male counterparts in all six categories of skills readiness.

As is true of their female counterparts in other countries, Brazilian women seem highly attuned to issues related to technology, social responsibility, and inclusion and diversity. Additionally, Brazilian women show far greater agility skills readiness than their female counterparts elsewhere in the world: While women globally scored a 3.5 in agility, Brazilian women scored a 4.3. In terms of agility, Brazilian women were highly likely to express a willingness to consider relocating, contrary to the global trend of female respondents' reluctance to relocate. For both genders, global skills is the area of greatest opportunity for improvement and the one area in which both men and women in Brazil achieved a skills readiness index score below 4.

Also in contrast to the trend seen in most other countries, Brazilians scored quite high in building business relationships overall, with a skills readiness score of 4.1. More than two-thirds (69 percent) of all Brazilian respondents said they believe that men and women are equally adept at building relationships. Of the remaining 30 percent, respondents were fairly evenly split as to whether men or women are more effective at building business relationships, at 16 percent and 15 percent, respectively.

China

More than two-thirds (68 percent) of professionals in China said they feel equipped to succeed in 2011—the highest number for every country surveyed except India. However, we noted some key differences among genders and generations. For example, men were more likely than women to say they are equipped to succeed (73 percent versus 61 percent, respectively), and Generation Y respondents were more likely than Generation X respondents to say they

feel equipped (76 percent versus 60 percent, respectively). Interestingly, while we saw large differences between genders in both Baby Boomer and Generation X respondents in terms of how equipped they feel to succeed, there was little difference between genders among Generation Y respondents, perhaps indicating that gender differences are starting to disappear with the younger generation of professionals.

Most respondents (68 percent) in China said they have seen significant change in the culture of business and predict a similar amount of change over the next three years. The good news is that respondents appear well prepared for this change: China's overall skills readiness score is 4.0, among the highest skills readiness scores of all countries we surveyed.

Employees in China expressed the greatest readiness in the areas of technology, inclusion and diversity, business relationships and global skills, with index scores in these areas all above 4. The only area in which we saw a significant difference between the genders in terms of skills readiness was in the area of agility, with a score of 3.9 for men, versus 3.6 for women. Additionally, men expressed much greater willingness than women to adopt many practices in the future, such as regularly stretching beyond their comfort zones (74 percent of men versus 60 percent of women), taking on additional responsibilities (76 percent versus 57 percent) and traveling globally to conduct business (71 percent versus 61 percent).

Both genders cited conducting business in a global environment as being more critical in the future than it is today; however, almost half (47 percent) of all respondents in China said they believe that men are more effective than women at building networks that will help advance their careers.

France

French respondents expressed doubt about their readiness for 2011: Only 24 percent said they feel equipped to succeed in the future. French women were significantly more likely than men to say they are *not* equipped (45 percent versus 34 percent, respectively), and we saw no significant generational differences.

The uncertainty of French respondents regarding their preparedness for 2011 was reflected in their skills readiness index scores. At 3.4, France's skills readiness index score was tied (with the Netherlands) as the lowest of all countries surveyed. While both French women and men said they feel ready for 2011 in terms of their technology skills, both genders expressed a low level of readiness in terms of global skills, social responsibility, agility, and inclusion and diversity. As we saw in other countries, building business relationships appears to be the area of greatest opportunity for improvement for the French, with men scoring a 3.2 and women scoring a 3.0.

Although France scored lower than the global average in terms of business relationships skills readiness, the French were more likely than respondents in other countries to perceive men and women as equally effective at building those relationships (70 percent for French respondents, versus 60 percent globally). Additionally, counter to global trends, respondents in France were more likely to say that women are more effective at building business relationships (19 percent) than men are (11 percent).

Interestingly, respondents in France—women and men alike—were significantly less likely than those in most other countries to cite having a global professional network as important to future success (38 percent of French women and 41 percent of French men, versus 62 percent of women globally and 58 percent of men globally).

Germany

Only four in 10 German respondents (41 percent) said they feel equipped to succeed in the global world of the future. We noted significant differences by both gender and generation. With respect to gender, 49 percent of men said they feel equipped, versus only 32 percent of women—the largest gender gap between respondents in any country. From a generational perspective, Generation Y respondents were the most likely, and Generation X respondents the least likely, to say they feel equipped—52 percent and 33 percent, respectively—with Baby Boomers falling in between, at 40 percent.

Germany's overall skills readiness index score matched the global average of 3.7. German respondents scored highest in the areas of technology (4.0) and inclusion and diversity (3.9). In the four other areas we examined—social

responsibility, agility, building relationships and global skills—Germans expressed equal feelings of readiness, with a score of 3.6 in each of these categories. Among gender differences noted within the categories, men showed a greater willingness than women to learn and utilize new technologies and to travel globally to conduct business. Neither gender appeared particularly willing to consider relocating to a different country, however. Interestingly, men considered their unwillingness to relocate to be the top factor limiting their career advancement.

More than half (62 percent) of German respondents said they believe both genders are equally effective at building business relationships. However, 31 percent said they believe men are more effective than women at building business relationships—more than four times the number who said they believe that women are more effective

in this area. At the same time, women in Germany placed more importance on both social and professional networks for success in 2011, as well as significantly more importance on understanding global cultural differences, than men did.

India

As we saw in other emerging markets, professionals in India feel optimistic about their readiness for the future: 70 percent—more than in any other country—said they feel equipped to succeed in the global world of the future, with no significant differences between genders or generations. Only 6 percent of respondents in India said they are not equipped for 2011. It's likely that the technology and outsourcing boom in India has given the country a competitive advantage in the global world of the future.



More than three-quarters (79 percent) of Indian women forecasted significant changes in the business world of 2011, compared with less than two-thirds (62 percent) of Indian men. In terms of where they foresee change, Indian women were more likely than men to say they expect to see more women in management, more equal opportunities for women, fewer boundaries where business is conducted and much greater importance of social responsibility.

India's overall skills readiness index of 4.0 places it in the "very ready" zone. Technology (with a 4.2 index score) appears to be the skills area where employees feel most ready, but they also cited global skills, inclusion and diversity, and business relationships as areas of strength (each of these achieved an index score of 4.0). At 3.8, social responsibility had the lowest score on India's skills readiness index. Mirroring global trends, Indian women were far less likely than Indian men to consider relocating to another country; however, they were also significantly more likely to see a growing importance in managing relationships via technology, suggesting that technologies may be viewed as a reasonable alternative to on-the-ground contacts.

In terms of building global business relationships, women and men alike in India see having global professional and social networks as a critical factor in their future career success.

Ireland

Less than half (42 percent) of Irish respondents feel equipped for 2011, split fairly evenly between genders. While there was no gender gap, we noted a significant generational gap, with Generation X and Generation Y respondents—at 49 percent and 44 percent, respectively—far more likely than Baby Boomers, at 29 percent, to feel equipped to succeed. Both women and men predicted that

the aspects of business most likely to change significantly over the next three years are competition for resources, increased flexibility for staff and the focus on climate change.

Ireland scored slightly lower than the global average in terms of overall skills readiness (3.6, versus 3.7 globally). Both women and men expressed high readiness in terms of technology skills, and both genders indicated a particularly strong willingness to learn and utilize new technologies. Not surprisingly, Irish men and women cited their technical capabilities among the top two factors contributing to their career advancement.

We identified opportunities for improvement for Irish professionals in the areas of social responsibility and agility (scores of 3.6 each) and global skills and business relationships (scores of 3.5 each). Although we saw no significant difference between men and women in the area of agility, women indicated greater willingness than men did to consider new roles yet less willingness to consider relocating for their jobs.

Only 55 percent of Irish respondents overall—5 percentage points lower than the global average—said they believe that men and women are equally effective at building business relationships. Of those who said that one gender was more effective at building relationships, four times as many said they believe that men are more effective than said women are more effective (36 percent versus 9 percent of all respondents). Interestingly, women were significantly more likely than men to say that men are more effective at building business relationships (44 percent versus 28 percent).

Italy

Just over four in 10 Italian respondents (43 percent) said they feel equipped for success in 2011, with

no significant differences between men and women. Italian respondents, particularly women, were less likely than respondents in other countries to say they expect a significant amount of change in the business environment by 2011—40 percent of Italian women and 43 percent of Italian men, compared with the global averages of 54 percent for women and 50 percent for men.

Italy's overall skills readiness score of 3.6 is slightly below the global average (3.7), and we saw clear differences in Italian professionals' skills readiness across different categories. For example, while Italian respondents overall scored above 3.5 in the areas of technology, inclusion and diversity, and business relationships, they appear to be less ready in the areas of social responsibility, global skills and agility—all of which, at scores of 3.5 or below, represent areas of opportunity for improvement. With the exception of agility (where Italian men scored 3.5 and Italian women scored 3.3), these results were fairly consistent across gender and generational boundaries.

Italian men were significantly more likely than Italian women to cite "fostering professional relationships" as a factor contributing to their advancement (cited by 34 percent of men versus 25 percent of women). Women, however, place greater emphasis on the importance of having a global professional network for future success: 66 percent of women rated this factor as highly important, compared with 57 percent of men. More than two-thirds of both genders (68 percent of Italian men and women alike) said they believe that women and men are equally effective at building business relationships. Of those who cited one gender as being more effective at building relationships, a greater number said that men are more effective (19 percent and 13 percent, respectively).

The Netherlands

Just 41 percent of Dutch respondents said they feel equipped for success in 2011, and we noted a large gender gap—with 46 percent of men feeling equipped, compared with only 35 percent of women. In addition, the Netherlands' overall skills readiness score of 3.4 is noticeably lower than the global average of 3.7 and suggests a number of areas in which both men and women may need to focus greater attention.

The Dutch scored noticeably below the global average in all skills readiness categories we examined with the exception of inclusion and diversity. Agility, social responsibility, business relationships and global skills may be areas of particular interest for employers and workers alike, as each of these received an overall skills readiness score of 3.3 or below. As we saw in a number of other countries, Dutch women seem somewhat more attuned to certain factors related to inclusion and diversity and to social responsibility than do their male counterparts. For example, women were significantly more likely than men to say that understanding different perspectives (cited by 78 percent of women versus 68 percent of men) and valuing diversity (cited by 72 percent of women versus 65 percent of men) are very important to building business relationships. Women were also significantly more likely than men (64 percent versus 49 percent) to rate working for a company that practices corporate social responsibility as important to them.

When it comes to building business relationships in general, more than half (57 percent) of all Dutch respondents said they believe that men and women are equally skilled. However, of those who said that one gender was more effective than the other at building relationships, more than twice as many said they believe that men are more effective than said women are more effective (30 percent versus 13 percent).

Norway

Just 39 percent of Norwegian respondents said they feel equipped to succeed in the global business world of 2011, with some notable differences between genders and age groups. Women were significantly more likely than men to say they do not feel equipped (22 percent versus 10 percent). At the same time, Generation X respondents were the most likely to say they feel equipped (44 percent), and Baby Boomers were the least likely (33 percent).

Norway's overall skills readiness index score of 3.6 is just below the global average of 3.7. Norwegian men and women alike identified technology as an area of strength for future success, with scores of 4.1 for both genders. In contrast, business relationships, global skills and agility, each with scores of 3.5 or below, represent areas of potential focus for the Norwegian workforce.

In line with global trends, Norwegian women showed greater readiness than men in skills related to inclusion and diversity (3.8 for women versus 3.6 for men), while men showed somewhat greater readiness in the area of agility (3.5 for men versus 3.3 for women). In particular, Norwegian women were significantly more likely than Norwegian men to cite valuing diverse teams and opinions (58 percent versus 46 percent, respectively) and making corporate social responsibility a priority (34 percent versus 25 percent, respectively) as critical for leaders in 2011.

More than half (55 percent) of Norwegians overall said they believe that men and women are equally effective at building business relationships. However, we noted some disparity between the genders: While 60 percent of men said they believe the genders are equally effective at building business relationships, only 47 percent of women think this is the case. At the same time, 41 percent of women also said they believe that men are more effective relationship builders than women are.

South Africa

Nearly six in 10 South African respondents (58 percent)—more than any other country except the emerging markets of India, China and Brazil—said they feel equipped to succeed in 2011. At the same time, both women and men in South Africa said they see significant change ahead in the business environment, although more women than men forecasted a high level of change (72 percent of women versus 61 percent of men).

South Africa's overall skills readiness index score of 3.9 puts it in the "very ready" category and among the highest-scoring countries in this index. In fact, South Africans scored high (3.9 or above) in all areas of skills readiness and noticeably above the global average in all areas except technology. We saw little difference in the skills readiness scores of the two genders; only in the area of global skills do women show appreciably higher readiness than men—4.0 for women versus 3.7 for men. It may be that South Africans' high skills readiness scores can be attributed to their already-strong familiarity with conducting business in a global environment: Nearly nine in 10 respondents (88 percent) reported having working relationships outside of South Africa.

More than half of South African respondents (58 percent of each gender) said they believe that men and women are equally effective at building business relationships. However, nearly one in three South Africans (29 percent) said they believe that men are more effective than women at building such relationships. Interestingly, Generation X respondents were three times more likely than Generation Y respondents to say that women are more effective at building business relationships (21 percent of Generation X versus 7 percent of Generation Y).



Spain

Just 37 percent of Spanish respondents said they feel equipped to succeed in 2011, with no significant difference in the attitudes of men and women. However, we found some differences between respondents in different age groups, with 45 percent of Generation X respondents reporting feeling equipped, compared with only 30 percent of their Baby Boomer counterparts.

Spain's overall skills readiness index score is 3.7, in line with the global average. In fact, Spain is similar to the global average across all skills categories except business relationships, in which it has a skills readiness score of 3.3, versus the global average of 3.5. Similar to what we found in a number of other countries, women in Spain seem more highly attuned than do their male counterparts to factors related to inclusion and diversity and to social responsibility. Women's skills readiness index scores are higher than men's in both of these areas, and women were more likely than men to say they expect large increases in the number of women in management positions, as well as in the importance of social responsibility and reducing environmental impact, by 2011.

Although building business relationships was the area on the skills readiness index where Spain seems to have the most opportunity for improvement, we did not see the large gender disparity in terms of perceived effectiveness in building these relationships that we noted elsewhere. In fact, Spain had one of the highest percentages of respondents overall—73 percent—who said they believe that men and women are equally skilled at building business relationships. And counter to results in many other countries, of those respondents in Spain who cited one gender as being more effective than the other gender at building relationships, the majority were significantly more likely to perceive women as more effective than men in this regard

(17 percent versus 10 percent of respondents, respectively).

Sweden

Only one-third (34 percent) of Swedish respondents said they feel equipped for 2011. We saw no significant difference between the genders in this regard, but we did find differences among the different age groups: Generation X respondents were the least likely to report feeling equipped to succeed in 2011, with only 24 percent of respondents in this group saying they feel equipped, compared with 43 percent of Generation Y respondents and 36 percent of Baby Boomer respondents.

Overall, a greater proportion of Swedish women than men (47 percent versus 31 percent) said they anticipate large-scale change in their business environment over the next three years. Sweden's skills readiness index score of 3.6 is just slightly below the global average (3.7). Swedes perceive technology as an area of particular strength (with a 4.1 index score), while their scores for global skills (3.4) and agility (3.3) indicate these as areas of potential opportunity.

Consistent with women in most other countries surveyed, Swedish women scored significantly higher than their male counterparts in all aspects of the inclusion and diversity and the social responsibility categories. Swedish women put significantly more emphasis than men on such factors as valuing diverse opinions (cited by 73 percent of women versus 59 percent of men) and reducing environmental impact (69 percent versus 58 percent) as important to success in the future.

While half (50 percent) of Swedish respondents said they believe that men and women are equally effective at building business relationships that help advance their careers, more than three times as many—38 percent versus 12 percent—said they believe that

men are more effective in this regard than said women are. Interestingly, the perception that men are more effective in building business relationships is driven primarily by women, with 45 percent of Swedish women saying they believe men are better at building these business relationships, compared with only 32 percent of Swedish men.

Switzerland

Less than half (45 percent) of all Swiss respondents said they feel equipped to succeed in 2011, with no real difference by gender or age.

Switzerland's overall skills readiness index is 3.6, just below the global average of 3.7, and its highest skills readiness score in any category is 3.9. We noted no significant difference between men and women overall or in the six skill areas that comprise the index. At the same time, we saw no significant generational differences among the scores.

Although Switzerland's technology score of 3.9 is fairly strong, it is significantly lower than the global average of 4.1, as is its inclusion and diversity score of 3.6, which compares with the global average of 3.8. Switzerland's scores of 3.5 for agility, 3.5 for social responsibility and 3.4 for business relationships—all lower than the global averages—indicate opportunities for improvement in these areas.

With regard to relationships, Swiss men were more likely than Swiss women to identify a lack of adequate business mentoring (cited by 23 percent of men versus 14 percent of women), not fostering social relationships (21 percent of men versus 12 percent of women) and not fostering professional relationships (15 percent of men versus 9 percent of women) as top career-limiting factors. These results are somewhat surprising, given that 40 percent of Swiss respondents overall (39 percent of men and 41 percent of women)

said they believe that men are more effective than women at building business relationships, compared with only 12 percent overall (9 percent of men and 16 percent of women) who said they believe that women are more effective in this regard.

United Kingdom

Both women and men in the United Kingdom expressed some pessimism about their readiness to compete in 2011: only 29 percent of all U.K. respondents (33 percent of men and 26 percent of women) said that they are equipped to succeed in the future. Despite this, almost half (48 percent) said they have seen significant change in the culture of business, and 52 percent predicted more change to come in the next three years.

Given this outlook, it is perhaps not surprising that the United Kingdom's overall skills readiness index score, at 3.5, is lower than the global average of 3.7. As we saw in a number of other countries, technology is the area where U.K. respondents expressed the most skills readiness, and business relationships is the area in which they expressed the least skills readiness. Additionally, as in a number of other countries, women in the United Kingdom seem to feel more prepared than men in terms of issues related to social responsibility and to inclusion and diversity, with scores of 3.7 in each of these two areas, versus men's scores of 3.4 and 3.5, respectively.

Women were more likely than their male counterparts in the United Kingdom to cite certain key relationship-building skills as critical for leaders to possess in 2011. For example, 70 percent of women cited the ability to build trustworthy relationships with peers, employees and clients as critical to future leadership success, compared with 60 percent of men. The same number of women (70 percent) also cited valuing diverse opinions as a highly important success characteristic for leaders in 2011, compared with just 57 percent of men.

Despite women's seemingly heavier emphasis on building business relationships, however, men were twice as likely as women to be seen as effective in this area. While 60 percent of U.K. respondents overall said they believe that both genders are equally effective at building business relationships, twice as many said they believe that men are more effective than said that women are more effective (27 percent versus 13 percent).

United States

Less than half (46 percent) of all respondents in the United States said they feel equipped to succeed in 2011. While there was no difference between the genders in this area, we noted some generational differences: Only one-third (34 percent) of Baby Boomers said they feel equipped to succeed, compared with half (49 percent) of Generation X respondents and 56 percent of Generation Y respondents.

The United States' overall skills readiness score is 3.7, the same as the global average. In line with global trends, technology appears to be the area where men and women feel most equipped for 2011, while business relationships seems to be the area of most opportunity for improvement.

Similar to the trend in a number of countries, American women were more likely than their male counterparts to cite technology, inclusion and diversity, and social responsibility as critical areas for future leaders. For example, 63 percent of women said they believe that valuing diverse teams and opinions will be highly important for leaders in 2011, compared with 53 percent of men. Additionally, 51 percent of women said they believe that making corporate social responsibility a priority will be important for future leadership, compared with 40 percent of men.

While two-thirds (66 percent) of U.S. respondents overall said they believe that men and women are equally effective at building business relationships, more than three times as many respondents said they believe that men are more effective in this area than said that women are (26 percent versus 8 percent). While the opinions were generally similar across gender and age groups, Generation Y males were significantly more likely than Generation Y females to believe that men are more effective at building business relationships (36 percent of men versus 19 percent of women, respectively).

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