



WOMEN IN THE KSA WORKFORCE

**How to build workplace cultures
where women thrive**

A research report produced jointly by

accenture

النهضة
Anahda

Foreword

Alnahda



Rasha K. Alturki

CEO, Alnahda Society

Since the founding of the **Alnahda Society** in 1962, it has been committed to the socio-economic empowerment of women and the activation of their role in national development. Over the years, it has remained nimble, shifting its activities to address the issues that are most pressing for women to effectively interact with the rapidly changing surrounding context.

Alnahda therefore aims to offer a model for civil leadership in economic development, research and advocacy both locally and internationally. Hence, beyond its domestic

efforts, Alnahda aspires to contribute towards women's inclusion globally. Most recently, it was granted consultative status by the Economic and Social Council of the United Nations. Additionally, and alongside Saudi Arabia's Presidency of the G20, Alnahda is the host organization of the Women 20 (W20), the officially recognized, independent of governments, engagement group to the G20 for women's economic empowerment in 2020.

The publication of this joint report is an extension of Alnahda's commitment to highlighting the potential and intrinsic value of women's economic participation and the need for equal access to economic opportunities. It is also in line with our pledge to promote a collaborative culture in knowledge production. As Knowledge Partners of the W20, we have learned from Accenture's expertise in work and employment, and in exploring new ways of achieving inclusiveness. They have reaffirmed our belief in teamwork, and in combining experiences, talent and ideas. We hope this report can further advance inclusive policy-making across sectors for the benefit of all.

Accenture



Gianmario Pisanu

**Responsible Business Lead,
Accenture Middle East**

The Saudi Presidency of the G20 set out its ambition of realizing the benefits of the twenty first century for all and in doing so called out the importance of creating environments where all people—particularly women—can thrive. Within this context, the work of the Women 20 (W20) took on greater significance than ever before. The declaration of a global pandemic on March 11th intensified the spotlight on women further still and we find ourselves on the crest of an unparalleled opportunity. The opportunity to help reset our

economies, to re-imagine the workplace, to build back better for women and, in KSA, to accelerate progress towards Vision 2030.

At Accenture, we aim to be the most inclusive and diverse company in the world. We do this not just because it's the right thing to do, but because it makes sound business sense. We believe—and this research shows—that building more equal workplaces attracts the best talent, drives innovation and creates the responsible business environment that our clients and employees demand. The impact of raising innovation mindset alone could add over USD400 billion to Saudi GDP by 2030.

Our role as Knowledge Partners to the W20 and our collaboration on this research with Alnahda has benefitted from their 58 years of experience in economically and socially empowering Saudi women. I hope this research will challenge and inform. Together, we can create workplace environments where the women and men of KSA thrive and where we can harness the full potential that diverse workforces bring to business, to the economy and to the people of KSA.

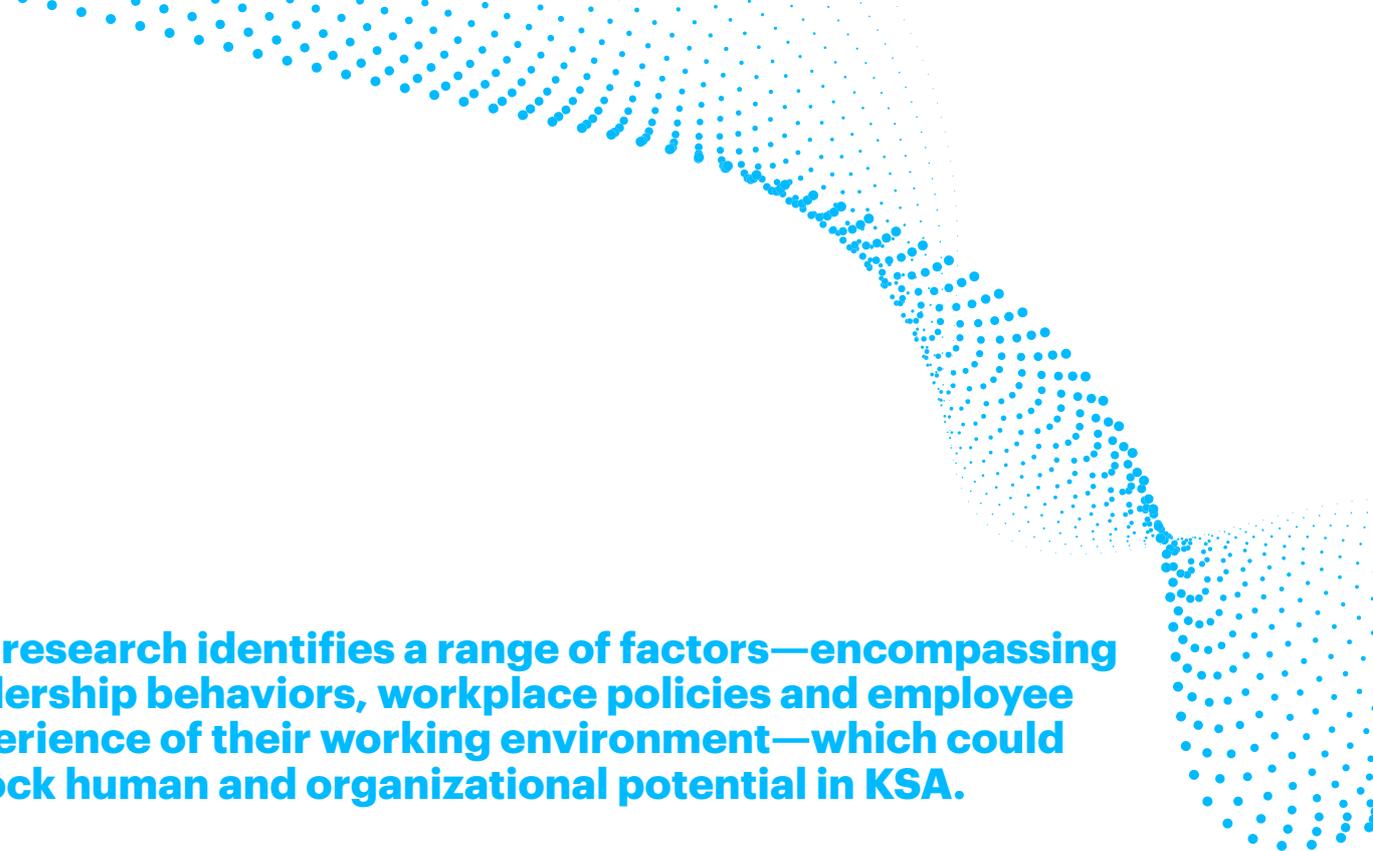
Executive summary

On a rooftop overlooking Riyadh a young woman speaks proudly of her role in a Saudi bank. At school she dreamed of entering the world of work and studied finance at university even though, at the time, associated careers were not open to women. But she persevered, and when the financial services sector opened up, she was ready. She is now thriving and grateful for the opportunity to fulfil her dreams.

Noura¹ is just one of the women who represent a growing economic force in the Kingdom of Saudi Arabia (KSA). Over recent years, myriad laws restricting both women's movement and their ability to enter the labor force have been removed. Women are close to parity with men in terms of education while the conventions that once limited the role of women in society continue to develop. It is a time of enormous optimism and hope.

However there is still much more to do. Getting more women into the labor force—a central pillar of Vision 2030 to improve the resilience of the economy and boost Saudi employment—is an important first step. But this alone is not sufficient to meet KSA's economic and social goals. For women to thrive in the workforce, and for KSA to realize the potential that comes from a truly mixed gender workforce, women must be empowered to make a meaningful contribution to the success of their organizations—and their career aspirations must be fulfilled.

Combining Alnahda's 58 years' experience in economically and socially empowering Saudi women, and 70,000 employee datapoints gathered by Accenture over the past three years, this report shows how building more equal workplace cultures is critical.



The research identifies a range of factors—encompassing leadership behaviors, workplace policies and employee experience of their working environment—which could unlock human and organizational potential in KSA.

In organizations where more of these factors are present—the top 10 percent most equal—female employees’ sense of ambition and confidence is 23 percent higher than average, and they are 62 percent more likely to advance to manager level and beyond. Moreover, the innovation mindset (the willingness and ability of employees to be innovative at work) of all employees in these organizations is more than 50 percent higher than average—creative potential which could add over USD400bn to Saudi GDP by 2030.

So, where should organizations in KSA begin? A powerful focus on culture and equality from the top—which sets out both the moral and commercial case for gender equality—is a critical starting point. This will help facilitate a shift in collective corporate mindset which can then be supported by five cultural actions strongly correlated with women thriving and advancing in KSA:

- 1 Elevate female leaders as role models**
- 2 Offer more workday flexibility for all employees**
- 3 Safeguard against discrimination and harassment**
- 4 Enhance parental leave**
- 5 Invest in targeted training**

If you want to know how your organization shapes up—and what more you can do to help women thrive—take the readiness assessment at the end of this report. Now is the time for organizations to build the environments that will unlock the enormous, pent-up potential of women in Saudi Arabia.

¹Name of interviewee changed to protect identity

PART 1

A growing economic force

Women have historically been underrepresented in the Saudi workforce.

Boosting the economic participation of women is a central pillar of Vision 2030 and its goal to improve KSA's economic resilience.

Women's participation in the labor force has grown as the government has introduced a range of women-friendly policies.

Saudi Arabia needs more women in paid employment. Raising female economic empowerment was identified as a key pillar of Vision 2030, which among other goals, aims to reduce dependence on oil and unemployment among Saudi nationals. And the importance of diversifying the economy and broadening the labor force has risen sharply due to a long-term decline in oil revenues, accelerated by the Covid-19 pandemic.

This represents a major change in an economy where oil accounted for more than 70 percent of fiscal revenuesⁱ pre-pandemic; where 80 percent of those employed in the private sector are non-Saudi;ⁱⁱ and where women account for just 16 percent of the labor force.

“Looking at the challenge of diversifying the economy away from oil, it's clear that it would be almost impossible to achieve if you are relying on just 50 percent of the population.”

Noor Hassan Shabib, VP—Strategic Planning and Business Development, SIDF

But a younger, more liberal generation is emerging—one that is “ready for change,” a young female job hunter told us. Coupled with leaders that recognize the need for change, women are increasingly recognized as a crucial piece to the puzzle of how to reignite the Saudi economy.ⁱⁱⁱ

The National Transformation Programme's Strategy To Increase Labor Force Transformation

	<p>Increase women's share in the labor market</p>	<ul style="list-style-type: none"> • Training and awareness • Flexible and remote work • Improved employment mechanisms
	<p>Increase women's share in managerial positions</p>	<ul style="list-style-type: none"> • Training and leadership orientation for female teams • Empowering women in civil service
	<p>Promote a culture of work and skills development</p>	<ul style="list-style-type: none"> • Interpersonal and technical skills training
	<p>Support women by tackling obstacles</p>	<ul style="list-style-type: none"> • Provision of affordable transportation • Childcare support • Attractive work environment

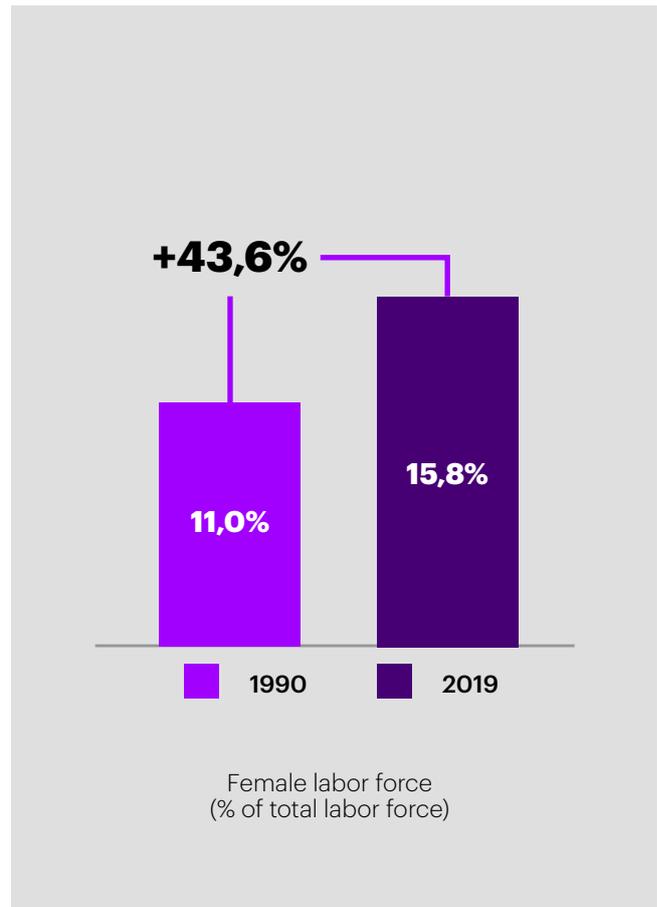
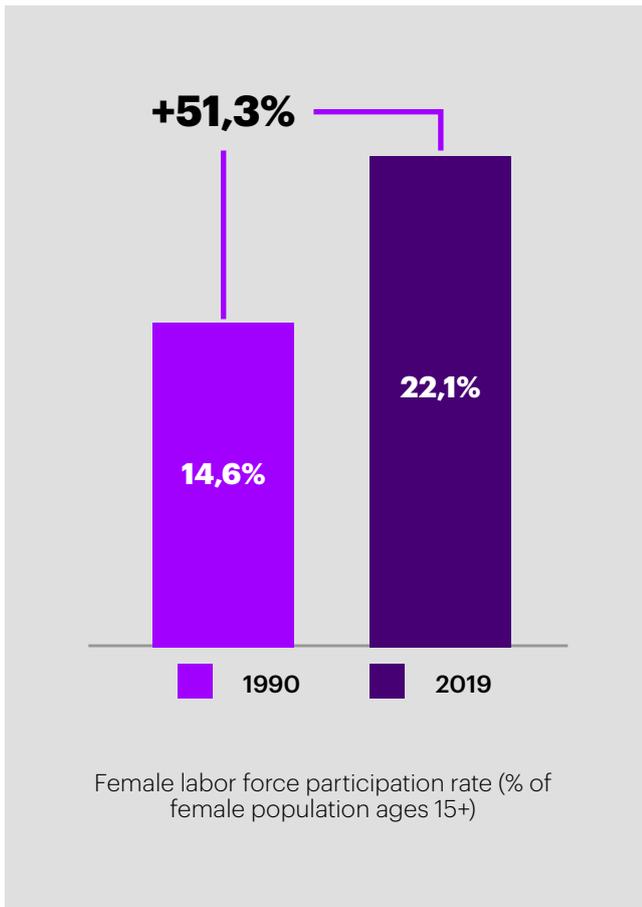
“Saudi Arabia now recognizes that women are its largest untapped reservoir of talent and is intentionally working on leveraging this asset.”

VP National Technology Officer, ~45 years old

It is against this backdrop that a series of policies have been introduced to enable more women to enter the workforce, many of which specifically target Saudi nationals. To increase employment of Saudi nationals in the private sector for example, the government introduced recruitment quotas for local companies through the Nitaqat initiative in 2011.^{iv} Through a series of initiatives under the National Transformation Program (NTP), Vision 2030 aims to increase female workforce participation from 22 percent to 30 percent by 2030.^v

Today, the progress is clear. Not only are the numbers of women entering the workforce increasing but their share as a proportion of total workforce is too. As a female senior pricing manager told us: *“We didn’t have any women in workforce 15 years ago, but right now, it is rare to have an environment without women.”* And the numbers speak for themselves. In the United States, the number of women in the labor force increased by 267 percent in the 50 years to 2000.^{vi} The number of women in the KSA labor force has increased by the same proportion in just half the time.^{vii} This means that, since 1990 the share of women in the KSA labor force has increased by 44 percent.^{viii}

Growing female labor force participation



Source: World Bank^{ixx}

In fact, Women, Business and the Law (WBL), an annual World Bank report that measures legal differences in accessing economic opportunities between men and women, found in 2020 that KSA had made more progress than any of the other 190 economies studied since 2017.^{xi}

The Covid-19 pandemic and ensuing economic crisis has added complexity in recent months. With demand for oil collapsing as a result of containment measures,² KSA introduced an austerity package which included tripling VAT and suspending a cost of living allowance for public sector workers to help plug a USD9 billion first quarter budget deficit.^{xii}

As yet, the impact the pandemic will have on the government's targets for women remains unclear. It could curb funding into key initiatives

needed to get women into work, or as KSA-based Jadwa Investment suggests, accelerate the pace at which expats are repatriated, opening opportunities for Saudi men and women alike to enter the private sector.^{xiii}

Whichever way the pendulum swings, one thing is clear: women are needed now more than ever as KSA doubles down on efforts to make its economy more resilient. But getting more women into work, is just half the story. More equal workplace cultures where everyone can thrive will be needed to truly reap the benefits of an equal workforce. In this section we look in detail at what has already been achieved; the following section then explores what to do next.

² According to the IEA, demand for oil could drop by 9% across the year, returning to oil consumption to 2012 levels (Source: <https://www.iea.org/reports/global-energy-review-2020>)

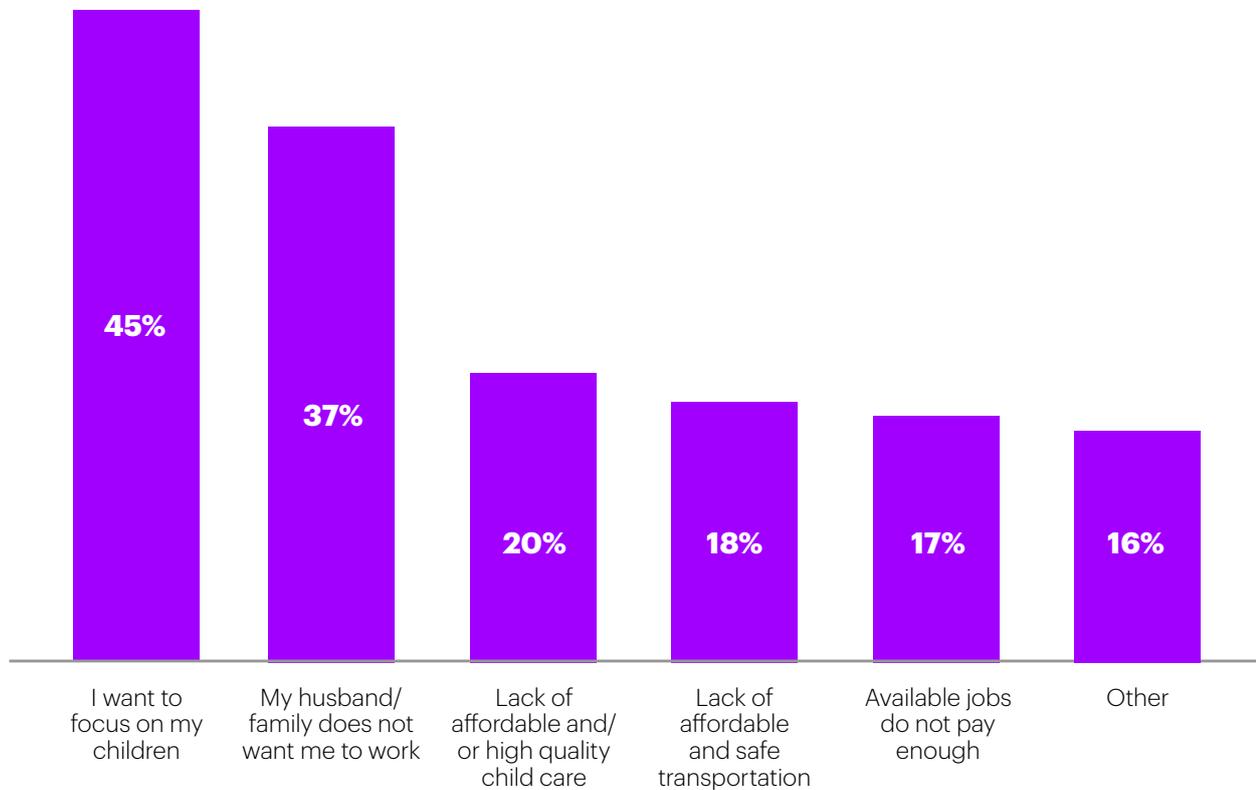


The labor force has been transformed over the past decade. In 2009, only 14 percent of Saudi women above the age of 15 were employed^{xiv}—most of whom worked in the public sector.

In the private sector, Saudi women accounted for only 8.5 percent of Saudi workers in 2009, with the majority of private sector jobs held by men and non-Saudi expatriate workers.^{xv}

Today, the picture is brighter: Saudi women now make up 32 percent of Saudi workers in the private sector according to Alnahda's Takafu Index. And creating private sector jobs for women remains a priority with the government taking a multi-pronged approach to removing the various barriers preventing women from entering the workforce.

Reasons given by non-working mothers (with children younger than 18) for not looking for paid employment



Source: Harvard Kennedy School, 2018^{xvi}; Survey of Saudi women, 18-40, (n=2,000)

First, through the Nitaqat Saudization program, the government increased the recruitment of Saudi women in the private sector. The policy required many companies to invest in upfront costs—such as gendered facilities—to meet their recruitment quotas, facilitating further recruitment of women even as targets were met. This has had a direct impact on the number of Saudi women joining the private sector, nearly tripling their share of the Saudi workforce from 10 percent in 2011 to 27 percent in 2015.^{xvii} In some sectors, the policies have been more explicit. For example, at least 30 percent of employees in perfume stores must be women, while lingerie shops can only hire female employees.^{xviii} The government is also

working with companies like IBM and Huawei to create more jobs for Saudi women.^{xix}

Removing childcare barriers has also been essential. In a 2018 Harvard survey of over 2,000 Saudi mothers, 65 percent of respondents reported that they were not looking for a job either because they wanted to focus on their children or due to the lack of affordable and/or quality childcare.^{xx} To address this, the government has focused on supporting women in their childcare responsibilities by introducing initiatives such as Qurrah, a childcare subsidy program.^{xxi} Companies with more than 50 female employees are now also required to provide company-based nursery facilities.^{xxii}³

³The impact of this policy remains unclear. It may potentially incentivize organizations to maintain the number of female employees below 50 to avoid the costs of providing daycare facilities.

A lack of decision-making power has also stopped women from looking for work: 37 percent of young mothers reported not job-hunting due to resistance from their husbands or other family members. Since 2012 however, women have been able to work in a range of professions such as shop assistants or park attendants without the permission of a guardian—typically a male relative such as a husband or father.^{xxiii} The freedom to seek services without a guardian’s consent also now applies to education, healthcare and travel.^{xxiv}

“Removing the need for women to get their guardian’s approval to travel was one of the policies with the greatest impact so far. It was [a big] obstacle for business trips.”

Senior Marketing Advisor, ~40 years old

Transportation is another key barrier for women. “In Saudi Arabia, we haven’t had an adequate public transportation system so historically, women could only hire a driver or take a taxi,” an entrepreneur in her thirties explained, “[So] women spent a lot more [money] than men, sometimes as much as half their income, on transportation.” This is a cost that may have deterred many from taking up job offers.^{xxv}

In June 2018 however, KSA lifted a ban prohibiting women from driving. Not only did this enable women to move freely but it also opened up new job opportunities. According to a 2018 Bloomberg forecast, this could add \$90bn to the economy by 2030.^{xxvi} *Wusool*, a subsidy covering 80 percent of transportation costs, was also introduced for women who have recently joined the private sector job market.^{xxvii}

There has also been a focus on equipping women with the right skills. For example, a range of training programs were introduced to help jobseekers and those employed stay competitive. *Doroob* is a case in point, providing access to accredited and non-accredited courses covering a range of topics from English to digital literacy.^{xxviii}

Uber and the road to entrepreneurship

Entrepreneurs contribute to economic growth in many ways, from creating jobs to bringing new products and services to market. Women account for an estimated 39 percent of entrepreneurs in KSA, up from 4 percent in 2007.ⁱ And a recent Accenture survey found that 73 percent of women in Saudi Arabia aspire to start their own business within five years.ⁱⁱ

The Uber platform supports women as riders to participate in the labor force by helping to overcome transportation challenges to and from the workplace; and helps partner drivers to earn an income. Moreover, 15 percent of Uber partner drivers globally also run another business, according to an Accenture/IFC study, using the platform to smooth out cashflow, build credit profiles and network with potential advisors, investors and customers.ⁱⁱⁱ

Uber have been working closely both with Alnahda and the KSA government since the ban on women driving in KSA was lifted, and in 2018 Uber launched ‘Masaruky’ (“your path” in Arabic) to boost economic opportunities for women. Examples of specific initiatives to support women include:

- One early barrier for women was the difficulty of obtaining a license—because of both the cost and high demand—so Uber funded and secured places for 300 women at the Saudi Driving School
- Uber partnered with Alnahda to identify and support underprivileged women to get driving licenses
- ‘Women Preferred View’ was introduced in 2019 to allow female drivers to select the preference to pick up female passengers only

As Mohammad Gazzaz, General Manager for Uber in Saudi Arabia, told us: “There is no typical socio-demographic profile of female drivers in KSA—but they all share a common desire: to take control of their future.”

Building better culture: helping women thrive in the workplace

KSA's leaders recognize that getting more women into the workplace is only half the battle. Policies must also encourage companies to create workplace cultures where women can thrive alongside men.

In fact, the NTP includes creating a “working environment suitable for women” as one of its key objectives.

To do this, KSA has worked to set basic employment standards for all Saudi nationals, by closing gender gaps in labor rights. For example, in 2013, the Nitaqat initiative set a minimum salary requirement for full-time Saudi employees.^{xxxv} The government has also equalized the retirement age for men and women.^{xxxvi}

Women also now enjoy greater protection from discrimination and harassment. Workplace discrimination against all citizens is now strictly prohibited, covering any type of discrimination from gender to disability. On gender, for example, employers can no longer dismiss female employees while they are pregnant or on maternity leave.^{xxxvii} Encouragingly, more than half (57 percent) of female employees surveyed in KSA said their employer had reduced incidents of discrimination and harassment over the past five years.^{xxxviii}



Furthermore, the government has boosted “personal freedom, privacy and dignity” by introducing new anti-harassment laws in 2018 that attach significant consequences to misconduct. Female members of the Shura Council, KSA’s Consultative Assembly, welcomed the new law, remarking that it was “an important addition to the Kingdom’s legal history, [filling] a legislative vacuum” but that more will need to be done to protect victims reporting incidents and witnesses alike.^{xxix}

As women still largely bear the burden of household responsibilities, creating cultures that allow women to juggle competing priorities is important. Promoting flexible work—something 38 percent of women working in Saudi say has been key to them advancing in the workplace^{xi}—is one potential solution. The *Teleworks* program acts as a bridge between employers and job seekers looking for remote possibilities. Still in development, the program now includes

a web portal that allows accredited businesses post remote opportunities and monitor performance of enrolled employees.^{xii}

Finally, there has been action to ensure the ambitions of the 80 percent of female employees who strongly aspire to senior leadership are not frustrated.^{xiii} For example, the NTP explicitly aims to increase the female share in managerial positions through training and leadership programs.^{xiiii} A female sales representative explained to us: “As there are not many women in executive positions, the Ministry of Labor introduced a great program to push more females into leadership positions in public and private companies. They ask the company to nominate talented people and the government gives them the necessary training. After two to three years, this employee should be promoted to a higher position. I actually attended a leadership program at INSEAD that was funded by the government.”

“Now you have more and more females entering the workplace and the government is more supportive than it was in the initial stages where there was a lot of focus on segregated seating and having a male in leading roles and also not allowing females to enter certain buildings like ministries.”

CFO, ~40 years old

PART 2

More equal cultures are key for women—and the economy

By building more equal cultures, companies can help women advance, thrive, and drive innovation

If all organizations in KSA built cultures as equal as the top 10 percent, women would be up to 3 times more likely to advance to the manager level and 62 percent more ambitious and confident at work

The innovation mindsets of all workers could rise up to 4x; and GDP could rise by over USD400bn over the next decade

Workplace culture has significant influence on organizational performance.^{xiv} But 'culture' is a complex, dynamic concept; it is something typically built up over many years, making it hard to define and influence. So, in 2018, Accenture set out to define the culture factors that positively and significantly impact on the likelihood of women advancing in the workplace.^{xiv} Accenture identified 40 factors encompassing leadership behaviors, workplace policies and employee experience of their working environment.

The benefits of these 40 factors are not confined to women. They extend to all employees and to the organizations which employ them, in terms of productivity and innovation. Put simply, the presence of these factors unlocks human and organizational potential. In this section, we show how organizations in KSA can harness their power to build more equal workplace cultures in which women progress and organizations grow.

How we define 'culture'

Over the past three years, Accenture has surveyed over 70,000 employees around the world in its *Getting to Equal* research series. This has allowed Accenture to identify—and quantify the strength of—the factors which are positively and significantly correlated with women advancing and thriving in the workplace.

Accenture group these 40+ factors into three pillars:

BOLD LEADERSHIP

A diverse leadership team that sets, shares and measures equality targets openly.

COMPREHENSIVE ACTION

Policies and practices that are family-friendly, support both genders and are bias-free in attracting and retaining people.

EMPOWERING ENVIRONMENT

One where employees are trusted, that respects individuals and offers the freedom to be creative and to train and work flexibly.

Accenture uses the presence and strength of these factors to determine how 'equal' the workplace culture of every respondent to its survey is. It then identifies the 10 percent of respondents with the highest and lowest scores and analyzes in three buckets: More equal (top 10 percent); Less equal (bottom 10 percent); Average (all respondents).

The data for KSA is drawn from online surveys of 1,700 employees—including 747 women—in KSA conducted in 2018 and 2019; all types of job roles and educational backgrounds in organizations with 5+ employees were surveyed.

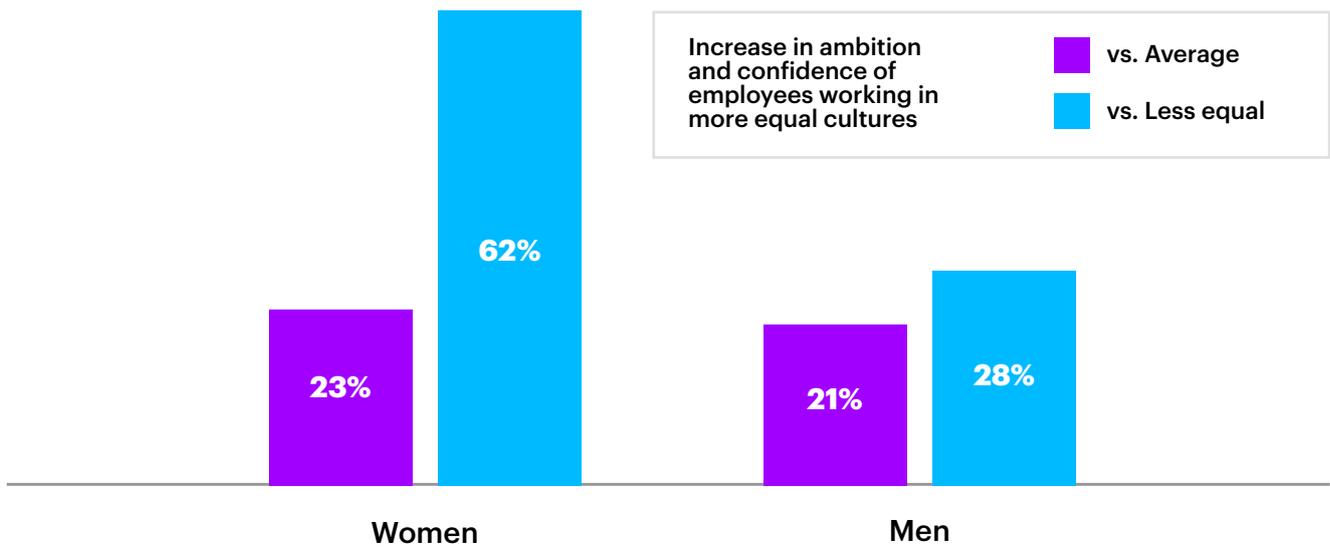
See Appendix for full methodology.

Culture unlocks the potential of women

The three pillars of more equal cultures (see 'How we define culture') each play an important role in helping women thrive in the workplace. Leaders set the tone from the top, making it explicit that gender diversity is a priority. Clear policies turn the words of leaders into the infrastructure women need. And the working environment empowers women to bring their best to the workplace.

Our analysis finds that, in more equal cultures in KSA (the top 10 percent—see 'How we define culture'), women are 23 percent more likely to feel ambitious and confident compared with their peers on average; the gap with those in less equal workplace environments is 62 percent. Men get a similar boost in more equal cultures compared to the average workplace environment—but see a much lower improvement versus less equal environments.

Difference in levels of ambition & confidence of employees working in more equal cultures

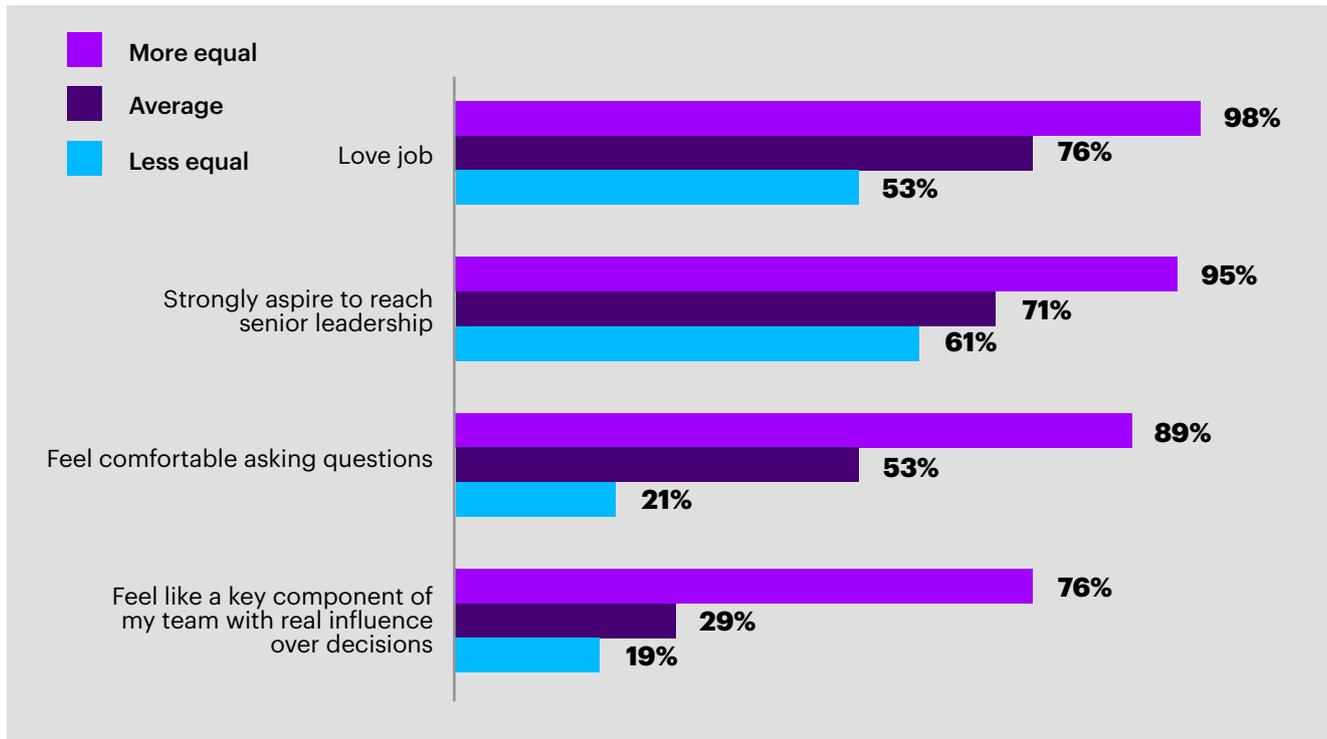


Source: Accenture, Getting to Equal

Breaking 'ambition and confidence' down into its constituent components is revealing. For example, almost every employee in more equal cultures loves their job—compared with three-quarters in average cultures, and just over half in less equal cultures. Compared with the

average, employees in more equal cultures are also one third more likely to strongly aspire to senior leadership; two-thirds more likely to feel comfortable asking questions; and more than 2.5x more likely for feel like a key component of their team with real influence over decisions.

Proportion of employees in KSA who agree with the following statements; by equality of workplace culture



Source: Accenture, Getting to Equal

It's important also to highlight the commercial benefits of increased employee satisfaction. A 2017 Gallup study found that "engaged employees make it a point to show up to work and do more work...highly engaged

business units realize a 41 percent reduction in absenteeism and a 17 percent increase in productivity."^{xlvii} What's good for employees, tends to be good for their employers too.

Ambition and confidence

The 12 variables included in our definition:

- Satisfied with their pace of advancement in organization to-date
- Likely to be working for current employer in 12 months' time
- Loves their job
- Able to advance at the pace they want in organization in the future
- Aspires to be promoted to the next level in organization
- Aspires to be in a senior leadership position in organization
- Feels contributions are appreciated and respected by peers
- Feels contributions are appreciated and respected by manager/supervisor
- Does NOT feel like an outsider
- Feels comfortable asking questions
- Does NOT feel questions/concerns are ignored
- Feels like a key component of their team with real influence over decisions

Women thrive in more equal cultures

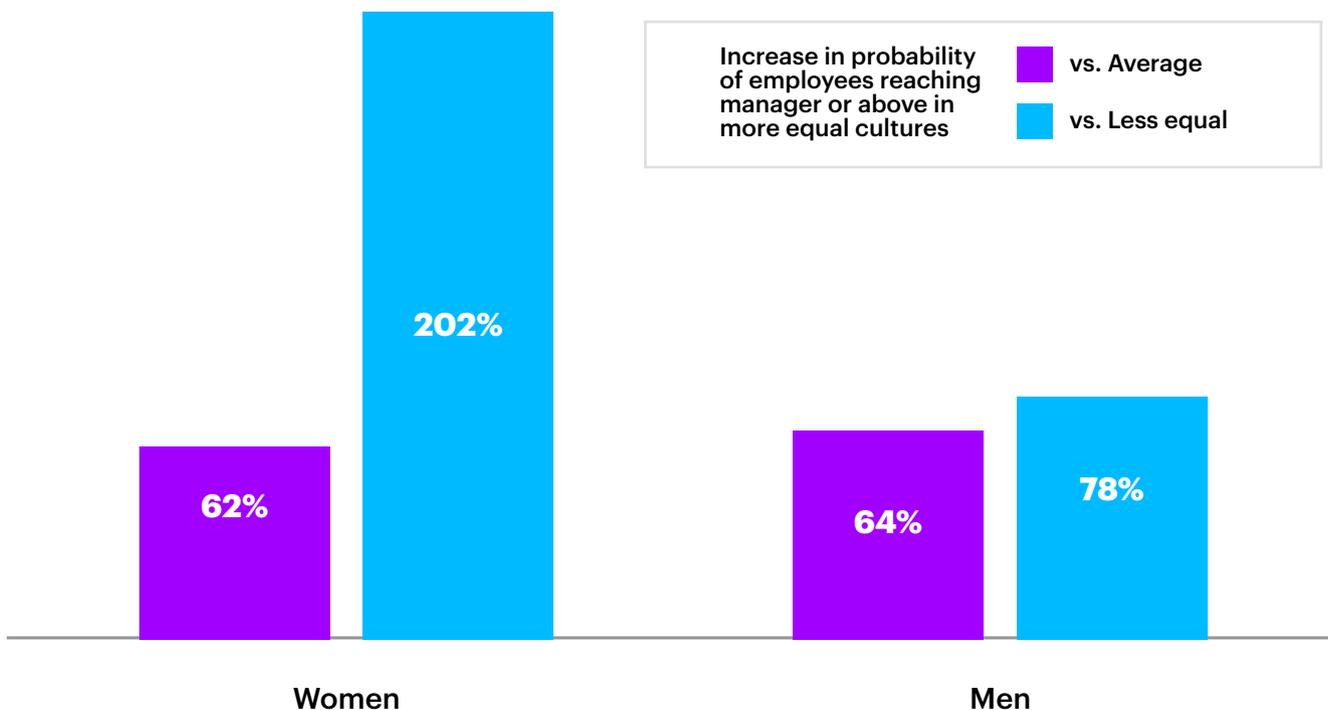
In environments where women feel more ambitious and confident, they are also more likely to advance their careers. In more equal workplaces, women are 62 percent more likely to reach manager level and beyond compared with the average; compared with less equal workplaces, they are more than 3x more likely to advance.

Interestingly, the jump for men in more equal cultures is similar compared with the average—

but much lower compared with less equal workplaces, suggesting women’s experience in less equal environments is much worse.

And while matching the workplace culture of the equality trailblazers may seem a long way off for some organizations, every step towards a more equal culture is important: a ten-percentage point increase in culture correlates with a four-percentage point increase in the chances of women advancing.⁴

Increased probability of employees reaching manager (or above) in more equal workplace cultures



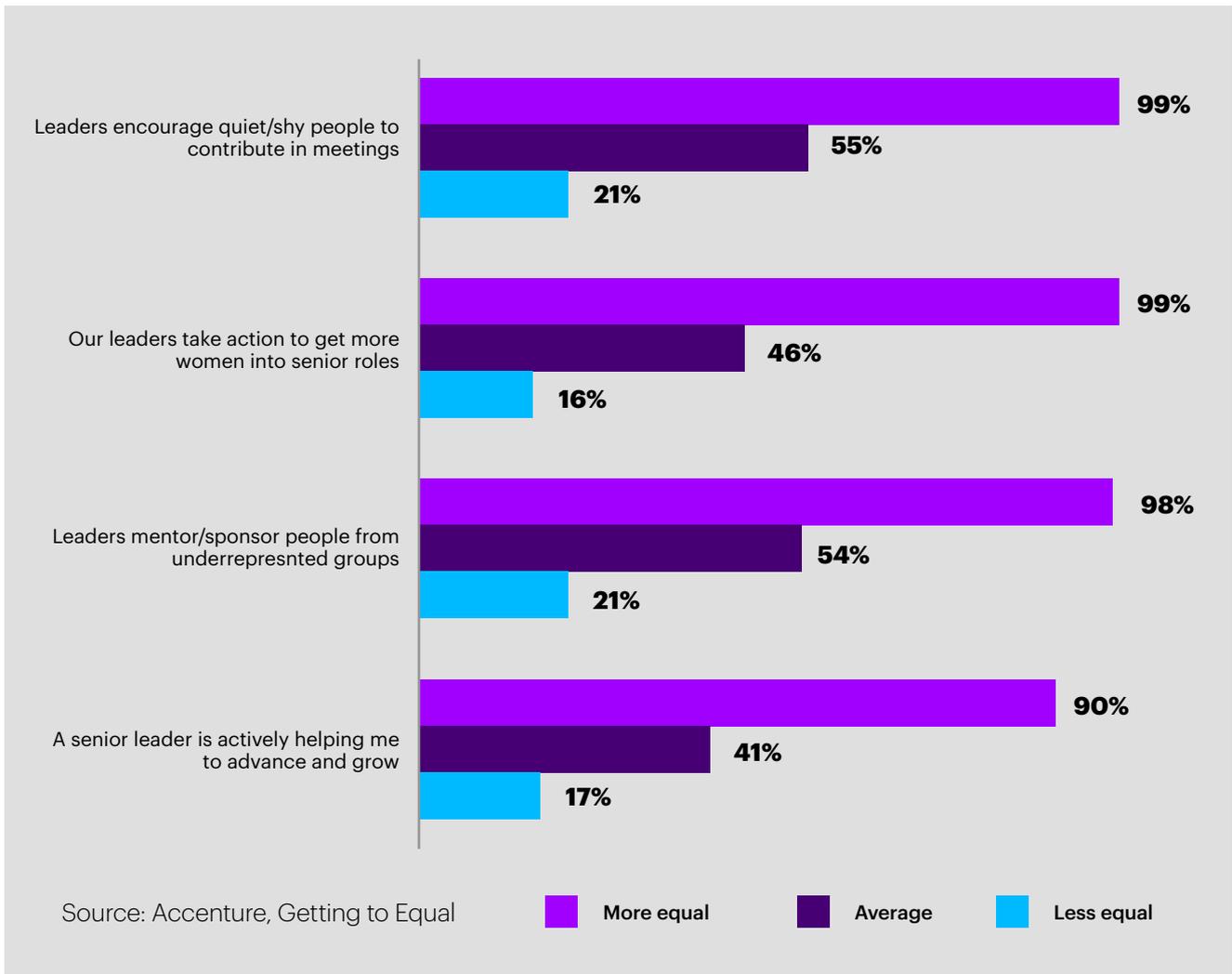
Source: Accenture, Getting to Equal

One key difference in more equal cultures is the role played by senior leaders. For example, 90 percent of employees in more equal cultures say that a senior leader is actively helping them advance and grow, compared with 41 percent

on average, and just 17 percent in less equal cultures. Similarly, almost every woman (99 percent) working in a more equal culture says their leaders take action to get more women into senior roles—this is more than twice as high as the average (46 percent).

⁴ The chances of a man advancing in the same scenario rise by 1 percent.

Proportion of employees in KSA who agree with the following statements; by equality of workplace culture



“For women to thrive and aspire to leadership, you need role models, and you need to shift the culture—and you cannot do that without women at the top.”

Noor Hassan Shabib, VP – Strategic Planning, SIDF

The advancement of women in the Saudi workplace matters—and not just for those women in work as a signal of achievement and responsibility, but also for those who come after them. The relatively few women who have reached the top in KSA are important role models—globally eight percent of female employees we surveyed cite visible female role models as an important driver of advancement; in KSA this triples to 25 percent. This presents a causality dilemma in that the relative scarcity of senior women could be holding women back from progressing.

The innovation bonus of more equal cultures

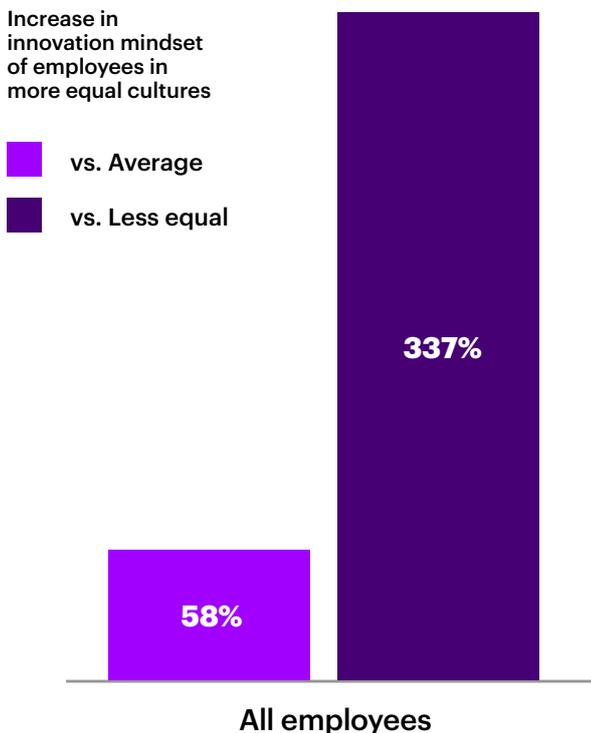
Beyond increased productivity, we also uncovered a strong relationship between workplace culture and the ability and willingness of employees to innovate. The importance of innovation to the success of organizations is hard to overestimate.

To survive, let alone thrive, in the age of disruption, organizations must continuously look at how to re-imagine markets, experiences, products, services, re-imagine content or processes. A recent Accenture survey of business executives found that 95 percent

identify innovation as “vital to competitiveness and business viability”.^{xlvi}

But employers cannot force their employees to be innovative; it requires time, space and trust.^{xlix} The 2019 Accenture study *‘Equality = Innovation’* found that the ability and willingness of an employee to innovate is closely linked to the workplace environment. In KSA, the innovation mindset of employees in more equal cultures is 57 percent higher than average; and compared with less equal workplace environments, it is over 4x higher.

Difference in innovation mindset of employees in more equal workplace cultures



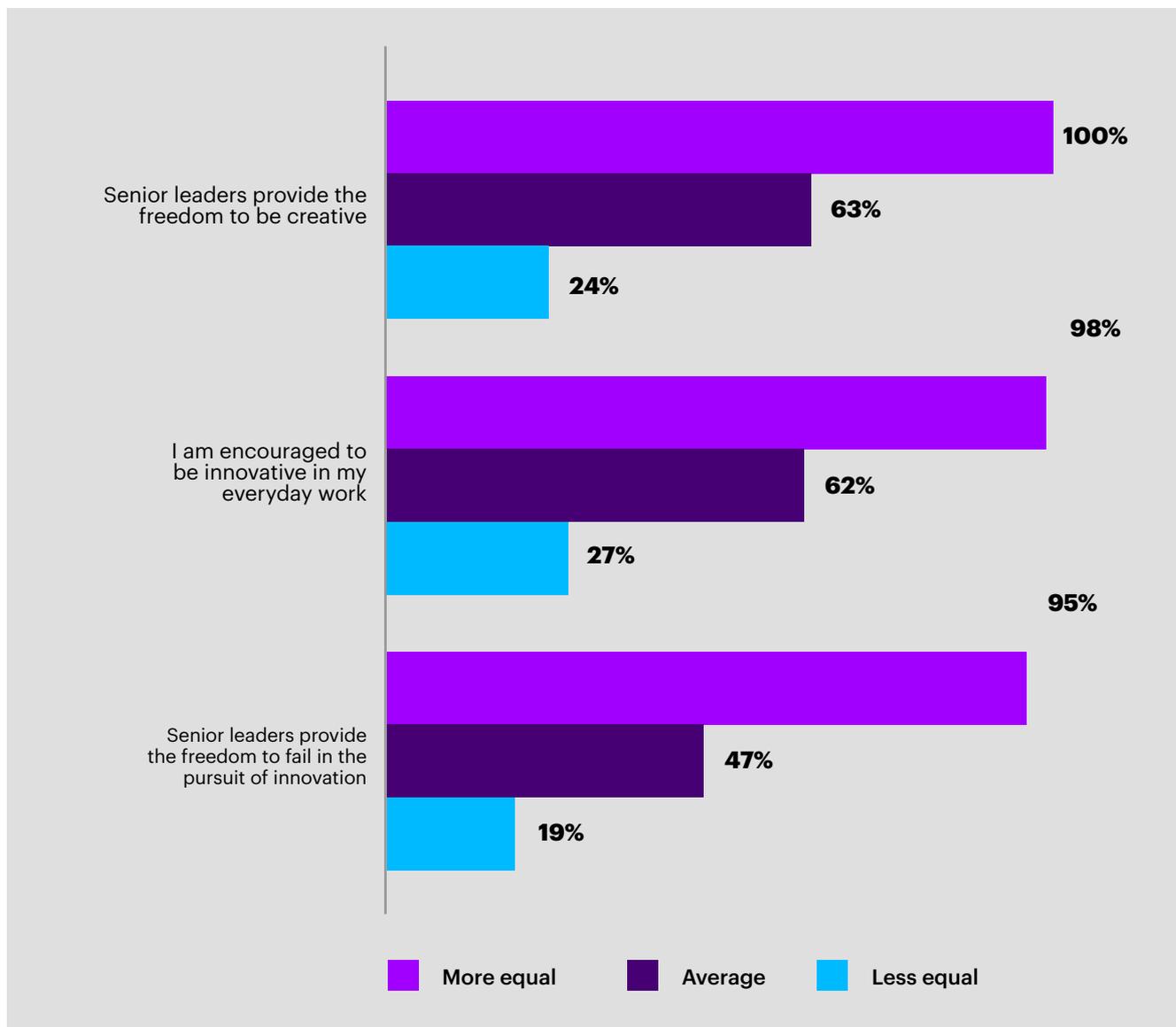
Being given the freedom and space to test ideas is vital for innovation—and this implicit trust between employer and employee is a key component of a stronger, more equal workplace culture. In more equal cultures, 95 percent of employees say they have the “freedom to fail in the pursuit of innovation”, dropping to 47 percent on average, and just 19 percent in less equal environments. And 98 percent of employees in more equal cultures say they are “encouraged to be innovative in their everyday work”—58 percent higher than on average.

Source: Accenture, Getting to Equal

But what's the value of this additional innovative activity to the Saudi economy? In Equality = Innovation, Accenture identified a strong positive correlation between higher innovation mindset scores and economic and labor productivity growth across the countries

studied. This relationship suggests that if all organizations improved the equality of their workplace, the KSA economy would be approximately 1.9 percent larger in each year between 2020 and 2030, adding USD408bn to total GDP over the decade.

Proportion of employees in KSA who agree with the following statements; by equality of workplace culture



Source: Accenture, Getting to Equal

Innovation mindset

We tested for six elements of an innovation mindset:

Purpose: Alignment around and support for the purpose of organization

Autonomy: Being shown a clear mandate for change—and being trusted to follow through

Resources: Having the tools, time and incentives necessary to innovate

Inspiration: Tapping into networks beyond the organization

Collaboration: Working with other departments or in fluid, cross-function teams

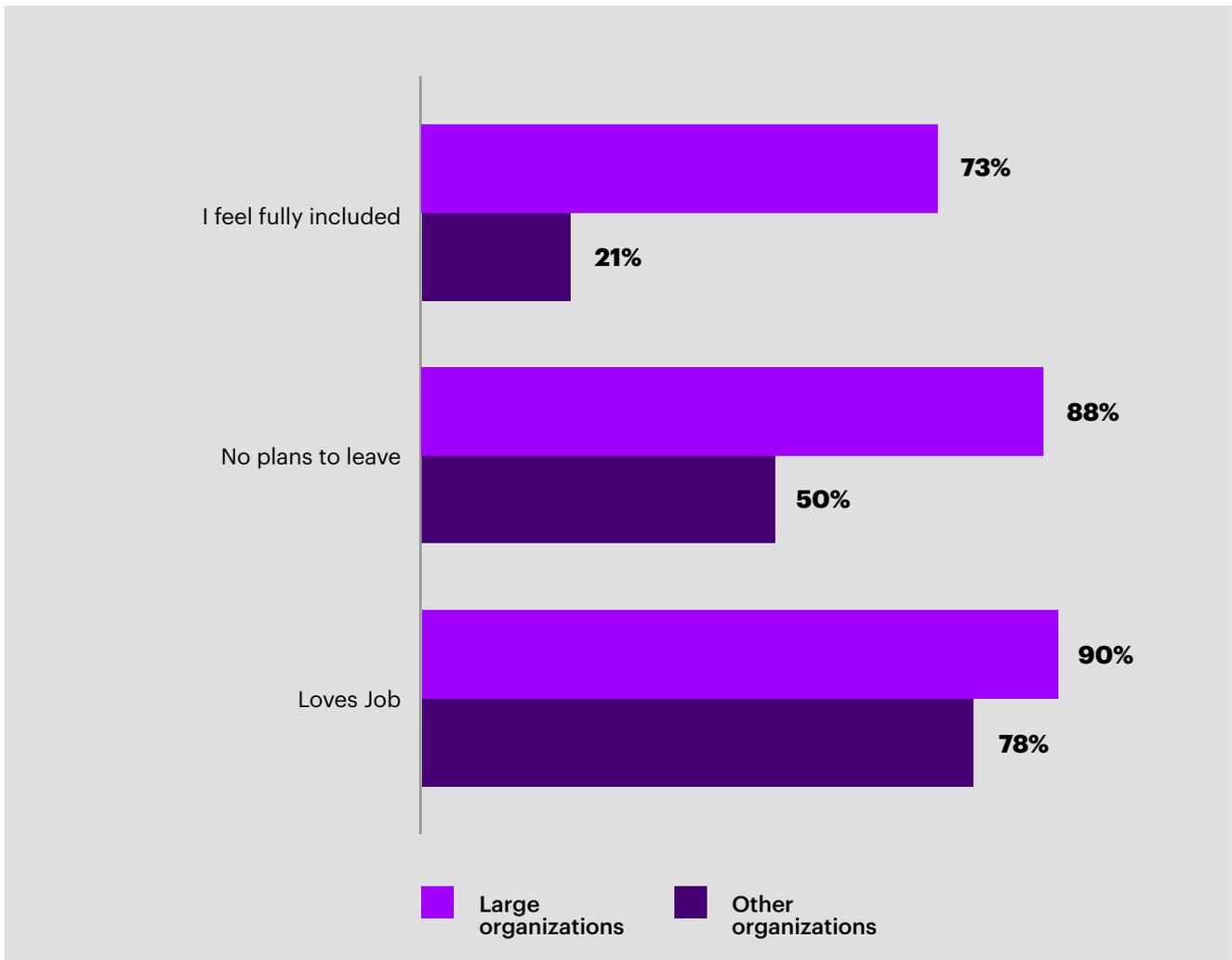
Experimentation: Experimenting with new ideas quickly without fear of failure

Large multinationals leading the way

Our survey suggests that women in KSA are more likely to thrive in larger multinational organizations. A customer service management specialist, 31, told us that the representation of women in any given workforce *“is not about the sector but depends on the company itself. International companies are more likely to hire women than local ones.”* At Saudi Aramco, for example, women have worked alongside men for decades (see case study).

Comparing the experience of women and men in larger (1000+ employees; international footprint) and smaller organizations, we clearly see that the outlook for women in larger organizations is brighter. For example, 90 percent of women in large organizations say they *“love their job”* compared to 78 percent of their peers working elsewhere; 88 percent (vs. 50 percent) expect to stay with their employer over the next 12 months; and they are more than three times as likely to feel ‘fully included’ in the workplace.

Proportion of women employees in KSA for whom the following statements are true



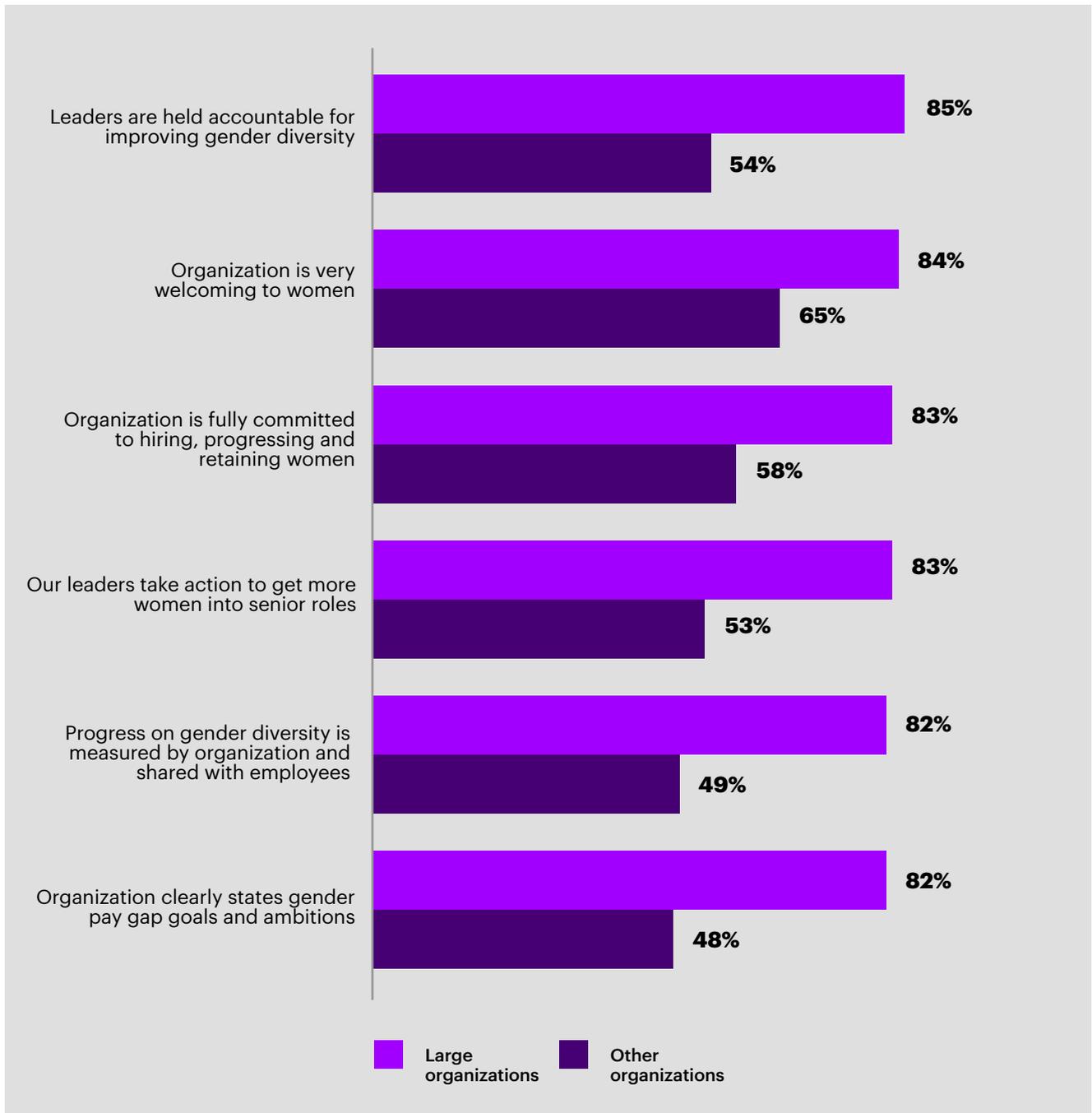
Source: Accenture, Getting to Equal; Large organizations n=111, Other organizations n=286

Notes: 'I feel fully included'—Question text: "Which of the following statements best describes how you feel in your team/organization? [I feel like a key component of my team with real influence over decisions]; 'No plans to leave'—"How likely is it that you'll still be working for your current employer this time next year?" [Very likely]; 'Loves job'—"Do you love your job?" [All or Most of the time]

And it's clear from the data why. Women working in larger organizations are much more likely to see a range of leader behaviors that specifically aim to close gender gaps. For example, 83 percent of women in larger organizations say leaders "take action to get more women into senior roles" compared with 53 percent of their peers; and 82 percent (vs. 48 percent) say leaders "clearly state gender pay gap goals and ambitions."

Moreover, while 80 percent of women in large organizations say sexual discrimination and harassment are not tolerated, only 38 percent of women working in smaller organizations agree.

Proportion of women employees in KSA who agree with the following statements about their leaders/organization



Source: Accenture, Getting to Equal; Large organizations n=111, Other organizations n=286

PART 3

How to realize KSA's social and economic goals

As discussed in Part 1, economic opportunities for women in KSA have expanded rapidly over recent years. However, gender equality is still a long way off: the Alnahda Takafu Index, which captures and tracks gender gaps in the private sector, estimates the national gender gap at 53 percent for Saudi nationals and 65 percent for non-Saudi workers in the private sector.

The opportunity offered by improving workplace culture is significant, but where should organizations begin? In this section, we identify the factors that make the biggest difference for women in KSA—those that are significantly and positively correlated with women advancing and thriving in the workplace. Organizations can begin to assess their performance against each one today.

We close by identifying some of ways in which policymakers and wider society can help by removing additional barriers that continue to prevent the full participation of women in the economy.

Build more equal workplace cultures

The impetus for change must start at the top. In a country where girls and boys are still segregated at school, gender mixing in the workplace can still feel uncomfortable for both women and men. Leaders should acknowledge this—but must also clearly set out the business case for creating environments in which women can thrive alongside men.

Of course, actions speak louder than words. So, while it's important for employees to hear that leaders recognize the power of culture, what leaders say needs to be backed up by what they do. The next step, therefore, is to make tangible investments in building more equal workplace environments—for example, in providing parental leave and flexible working. And finally, leaders need to actively drive cultural change down through their organization, for example by including the uptake of parental leave or flexible working policies in manager appraisals—and adjusting reward packages accordingly.

It's an approach which offers incredible commercial benefits: Accenture analysis finds that, globally, the organizations in which leaders are 'saying, doing and driving' cultural change are growing more than twice as fast as their competitors.¹ It's a massive competitive advantage, likely driven, at least in part, by the greater innovative activity we find in more equal workplace cultures (see previous section).

“Our senior leaders are convinced that recruiting women is not only the right thing to do—but that it is genuinely better for the business.”

Colin Sloman, Director of Talent and Leadership, Saudi Aramco

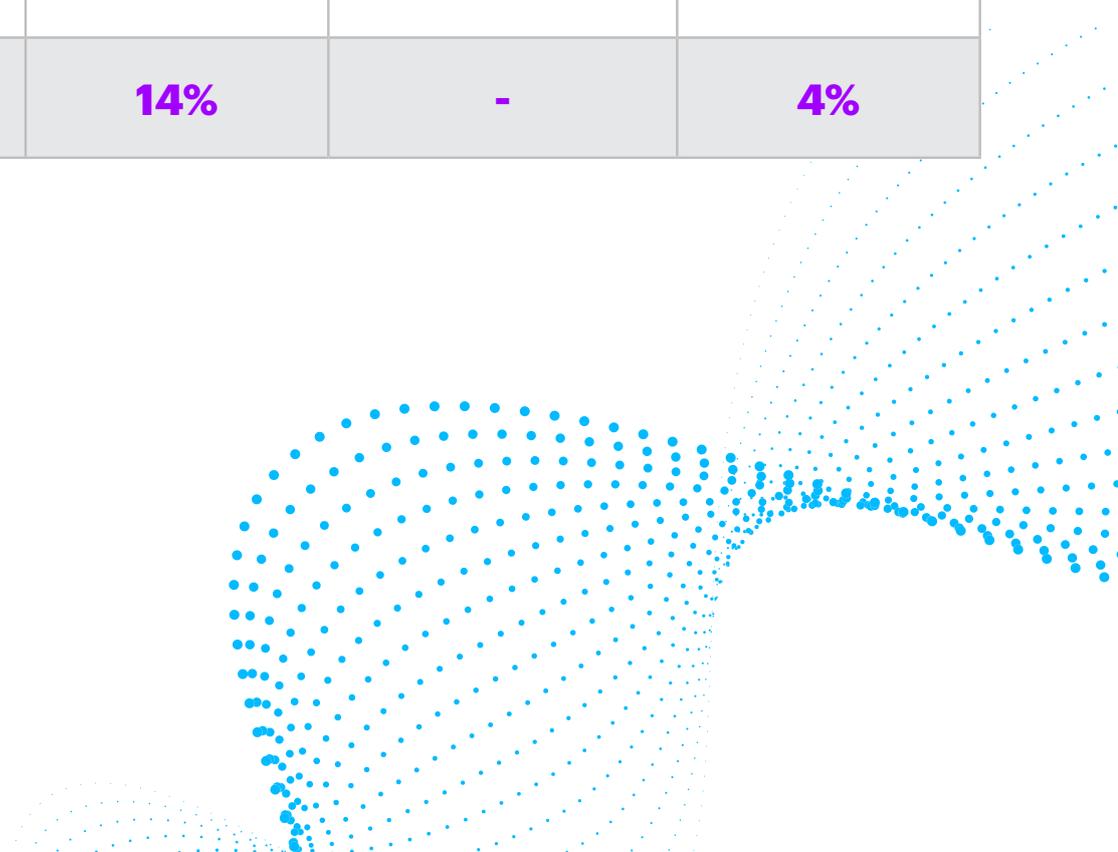
Below we set out five areas of workplace culture on which Saudi business leaders should focus their efforts. They must then remain visible, to drive this change down through the organization; for example, by building more gender diverse senior leadership teams, taking parental leave or working flexibly themselves.

Now is the time for leaders to make gender equality a strategic priority. The confluence of economic necessity, policy change and social norm evolution offers an opportunity: an opportunity for visionary leaders to banish the view that sees gender diversity and workplace culture as compliance issues, towards understanding them as sources of competitive advantage which drive innovation and growth.

Improvement in likelihood of women thriving in the workplace associated with presence of five culture factors

	LEVELS OF AMBITION & CONFIDENCE	LIKELIHOOD OF ADVANCING TO MANAGER+	STRENGTH OF INNOVATION MINDSET*
ELEVATE FEMALE LEADERS	-	33%	4%
SAFEGUARD AGAINST DISCRIMINATION AND HARASSMENT	21%	15%	3%
OFFER MORE WORKDAY FLEXIBILITY	-	28%	4%
ENHANCE PARENTAL LEAVE	19%	26%	-
INVEST IN TARGETED TRAINING	14%	-	4%

* Boost for all employees



FIVE CULTURE CHANGES TO MAKE TODAY

1. Elevate female leaders

There are, as yet, relatively few women leaders in KSA. A study conducted in 2017ⁱⁱ found that in 84 percent of companies in KSA, women held fewer than one-in-ten senior leadership roles; for 52 percent of companies this figure dropped below one-in-one hundred.

The Alnahda Takafu survey echoed this: HR representatives reported that only 25 percent of promotions granted within or to managerial positions were for women.ⁱⁱⁱ The lack of women also deprives the next generation of female leaders of important role models.ⁱⁱⁱ

“There are still many barriers that women face when it comes to senior managerial roles—the numbers speak for themselves.”

Senior pricing manager, ~35 years old

The burden therefore falls largely on male leaders to create more gender diverse leadership teams. And also to actively help male colleagues who, a customer service management specialist told us, find it “a bit hard to...accept having a woman as their manager.”

Our analysis highlights three areas of focus: building more gender diverse senior leadership teams; setting targets on gender diversity, measuring and sharing progress; and creating environments in which women ‘have a voice.’ In environments that pull these together, women are 33 percent more likely to advance to manager level and beyond—and their levels of ambition and confidence rise by seven percent. Employee innovation mindset also rises by four percent.

Building more gender diverse senior leadership teams has two principal, related benefits. Firstly, it provides clear evidence that leaders are ‘walking the talk’ when it comes to gender diversity; taking action themselves as opposed to leaving it to others. Secondly, these women leaders become role models, boosting the aspirations of the next generation of female leaders, and creating a virtuous cycle of increased diversity in leadership.

However, until this positive flow of women entering leadership in KSA becomes organic, targets (or quotas) on the proportion of women hired at every level from entry to the board should be introduced to level the playing field. Accenture analysis shows that women are likely to move further and faster where targets are in place— but they do even better where such targets are made public, allowing leaders to be held to account. In KSA, in organizations where progress on gender diversity is measured and shared, women are 30 percent more likely to advance. Globally, organizations in which leadership teams are held accountable for improving gender diversity are 63 percent more likely to have seen the share of women in senior leadership roles increase over the previous five years.^{liv}

Finally, leaders need to challenge the status quo at every level and create environments in which women have a voice and feel trusted. Female employees in KSA are 40 percent more likely to advance where leaders encourage quiet people to contribute in meetings—and are 36 percent more likely to where leaders give employees the freedom to fail in the pursuit of innovation.

2. Safeguard against discrimination and harassment

The pervasiveness of sexual discrimination and harassment in workplaces across the world has been highlighted by campaigns such as #MeToo. It imposes heavy costs on the victims, notably in terms of mental and physical health; and increasingly organizations can be drawn into costly litigation.

In Saudi Arabia, the incidence of sexual discrimination and harassment remains high: 47 percent of women working in Saudi Arabia say they or a colleague have faced this, compared

with 21 percent of their peers globally.^{lv} Moreover, a third of male employees say harassment is ‘tolerated’ in their organization—and a quarter of female employees say they would not feel comfortable reporting such behavior.^{lv}

“Harassment from some senior managers is still a problem. There is no protection for women in such situations.”

Customer service management specialist, ~31 years old



Creating environments in which women feel comfortable reporting such behavior emerges as the single greatest driver of women engaging productively in the workplace. In organizations where women feel comfortable reporting discrimination, harassment or other unethical behavior, levels of ambition and confidence rise by 21 percent and their likelihood of advancement rises by 15 percent. The innovation mindset of all employees also rises by three percent.

Ending discrimination and harassment requires concerted effort from all of Saudi society. However, organizations are important potential bastions of change, setting the basic standard of how women and men should interact with one another.

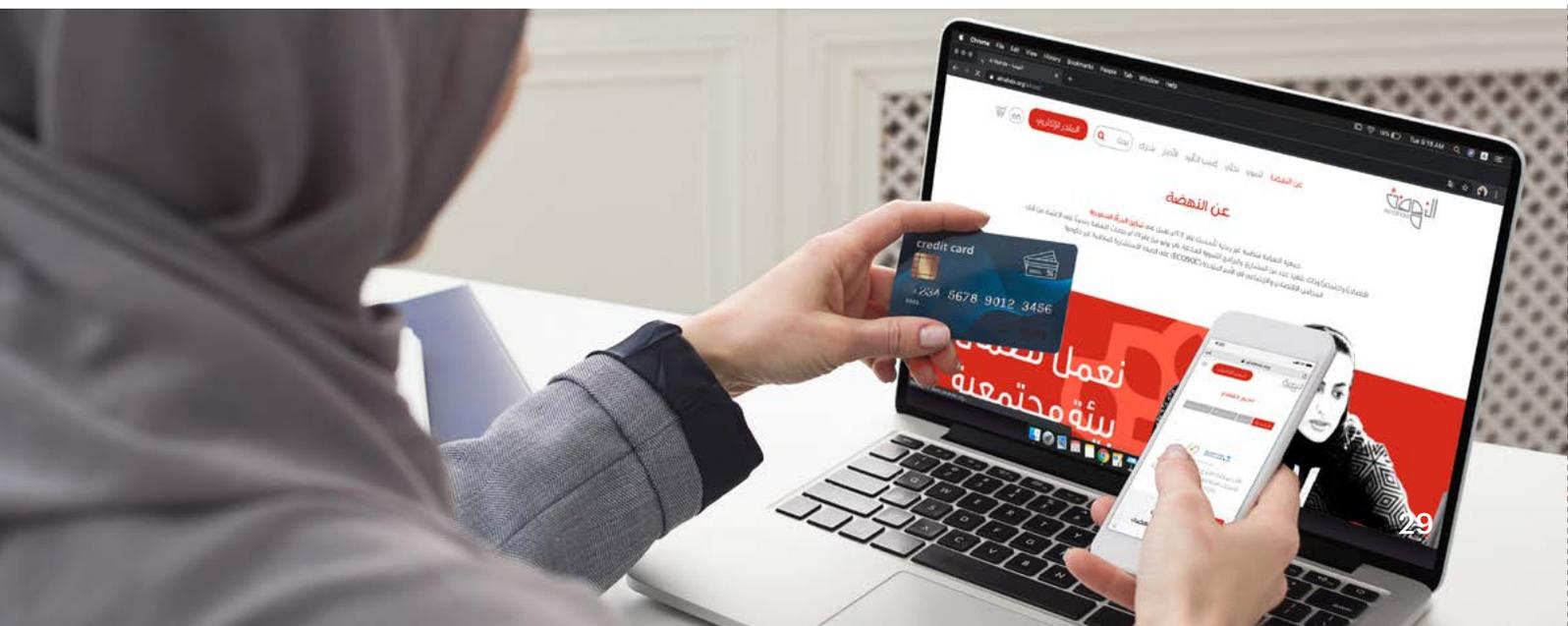
Education is an important first step. Organizations should teach their workforce how to identify unprofessional behaviors, understand their rights and the company's internal support mechanisms. Traditionally, corporate training on harassment and discrimination has been seen as a box ticking exercise—an annual requirement to watch a video or other passive content. Instead, organizations should invest in higher impact, compulsory training for the entire organization—training that is interactive, requires deep reflection and is regular enough to become the norm. The language used is also key; it should frame unprofessional behavior as everyone's problem and steer clear of accusatory tones towards men which could

cause additional resistance to change.

It is often hard for victims of unprofessional behavior to come forward for fear of retaliation and/or inaction. One US study suggests that 90 percent of people who experience harassment at work, never file a formal complaint, while 75 percent never discuss it with their employer.^{lvii} However, organizations can give women the right to remain anonymous—a right that should be paired with a zero-tolerance policy for retaliatory behavior.

Businesses should also consider developing an allyship system in which employees across the organization, at different career levels, can opt in to receive regular training on identifying, receiving and reporting complaints of harassment and discrimination. This broadens responsibility and gives victims more people to turn to for advice. Data mining can also help track incidence across teams, departments and locations to identify 'hot-spots' where specific interventions might be needed.

Finally, the consequences for unethical behavior should be clear and proportionate. Women do not want to be put through the sometimes-traumatizing task of recounting any violations without the genuine prospect of action being taken against an offender. Although the government has put in place protections and sanctions under its anti-harassment laws, organizations should go above and beyond to ensure their workplaces are safer for all.



3. Offer more workday flexibility for all employees

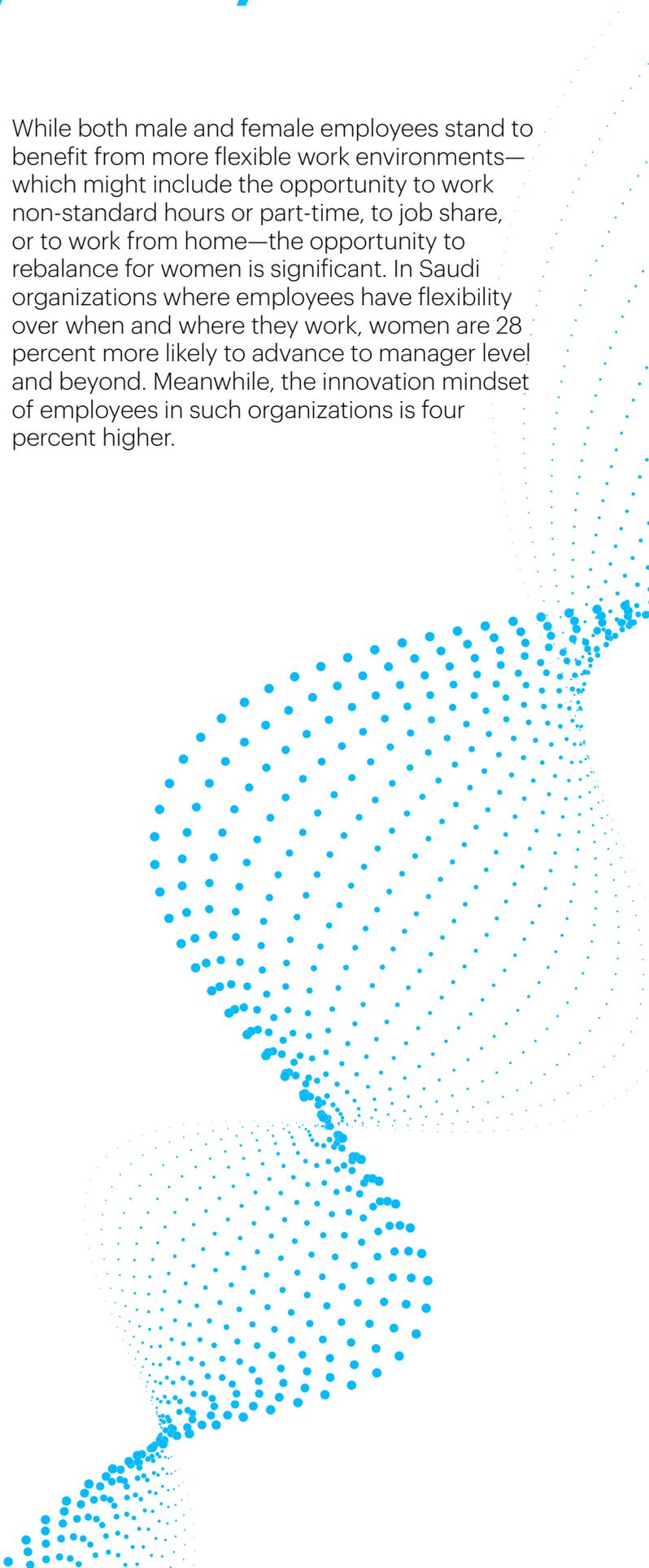
The Covid-19 pandemic has highlighted the importance of workplace flexibility. However, allowing employees greater flexibility in terms of when, where and how they work is not just important during a crisis; Accenture research over the past three years has shown that is good both for the individual and the organization.

In KSA, the workday still tends to be structured in a way that caters to the needs of an all-male workforce with few non-financial domestic responsibilities, limiting the job roles women can accept. This was clear in the Alnahda Takafu survey: male respondents show a greater willingness to extend their work hours while female participants with care responsibilities preferred fewer working hours.^{lviii} This creates a “mismatch between what the marketplace assumes people will value in their work and what women most deeply value.”^{lix}

While both male and female employees stand to benefit from more flexible work environments—which might include the opportunity to work non-standard hours or part-time, to job share, or to work from home—the opportunity to rebalance for women is significant. In Saudi organizations where employees have flexibility over when and where they work, women are 28 percent more likely to advance to manager level and beyond. Meanwhile, the innovation mindset of employees in such organizations is four percent higher.

“In KSA, in the past they never allowed people to work from home or distant learning. Yet, this would help women to manage their work-life balance. It would be great to have the option and still I’m very productive from home and can better manage my time.”

Entrepreneur, ~40 years old



To realize these benefits, leaders must commit, both through words and deeds, to injecting more flexibility into their organizations. This might include relevant hardware, such as switching from PCs to laptops or VPNs, and other digital collaboration tools. But it will also require a firm commitment from leadership, driven down through the organization. A great flexible working policy is next to worthless if supervisors simply deny employee requests.

A side-benefit of allowing women to work flexibly is that it might help mitigate challenges related to women operating in the workplace alongside men. Gender segregation in the workplace has not been a requirement in KSA since 2005, but gender mixing can still be problematic for men and women. One woman who works at the Luna food factory near Jeddah told *The Guardian*: “For me, it’s better to be separate. If we work with the men, I have to wear my abaya and my niqab—it’s less comfortable.”^{lxvi}

Moreover, given women can only work alongside men if separate toilets, cubicles prayer room and lunch areas, and a security system are available,^{lxvii} more flexible working could give organizations the extra time and resources they need to build high quality infrastructure. A

Harvard survey found that few working mothers in KSA actually use nurseries provided by their employer, perhaps due to the inadequacy of the facilities provided; 56 percent prefer to rely on domestic workers for childcare support.^{lxviii}

The Covid-19 pandemic has offered a window into the world of virtual working: One study found that 95 percent of business leaders in the UAE and KSA are comfortable with the shift towards remote work, up from 68 percent at the beginning of the pandemic.^{lxix}

Of course, organizations must be aware of the challenges associated with working remotely; for example, it could make it harder for women to gain the advantages offered by face-to-face networking opportunities in the office. It might even create a new form of presenteeism as it becomes harder to separate domestic responsibilities with work.^{lxx} These pain points must be carefully managed as organizations allow women to build a working day which works for them.

4. Enhance parental leave

Parental leave has been found to have a positive impact on parents and children, as well as on businesses and the wider economy.^{lxxi} Without paid leave following the birth of a child, parents are often faced with the choice of returning to work before they or their offspring are ready, or struggling financially. The issue is magnified across Arab States^{lxxii} where women spend almost five times as long as men on unpaid work such as childcare; the ratio globally drops to 3:1.^{lxxiii}

In KSA, standard parental leave amounts to 10 weeks for mothers and just three days for fathers. And it is not fully administered by the government, meaning the burden falls on employers, raising the perceived costs of hiring women as opposed to men. Interviewees confirmed that women’s careers often stall when they have children in KSA.

“You rarely see women in leadership positions, but the reason behind it is also that a lot of women stop working after reaching a certain age to take care of their families.”

Entrepreneur, ~40 years old

Paternity leave, therefore, is a critical area for development. If organizations stop at maternity leave it reinforces stereotypes about who is responsible for parenting, often disadvantaging women.

Accenture analysis shows that globally, when companies encourage only maternity leave, the likelihood of women advancing to manager and beyond falls by 2.7 percent from the baseline. But when paternity leave is also encouraged, the likelihood of women advancing increases by 0.3 percent.^{lxix}

In KSA, the link between organizations which provide and encourage parental leave and women advancing is particularly strong. Women are 26 percent more likely to reach manager level and beyond in these environments. Women also feel 19 percent more ambitious and confident in these organizations.

Organizations can draw inspiration from other companies—local or foreign—to find new, innovative ways to encourage parental leave. For example, since 2015, Accenture UK has offered shared parental leave to its employees; employees must take a minimum of 12 weeks of shared parental leave but are entitled to up to 30 weeks at full pay.^{lxxi}

“The tone we set from the top is crucial; for example, our communications and policies make it clear that we are an organization that values family.”

Noor Hassan Shabib, VP—Strategic Planning and Business Development, SIDF

The role of leaders to empower and inspire is also crucial. As with workplace flexibility, a good policy is only the first step; employees need to feel that they can take leave without a negative impact on their career. This is perhaps particularly true of men for whom taking paternity leave is less ‘culturally acceptable’, driven in part by their household financial responsibilities. Tellingly, in organizations where a senior leader has taken at least a month of paternity leave, women are 28 percent more likely to reach at manager level.

5. Invest in targeted training

Training is a powerful signal that employers care about the careers of their employees. And importantly, it benefits both employees themselves—through boosting skills, confidence and aspirations—and the organizations they work for—for example, through higher productivity, loyalty and independence.

Training which keeps employee skills relevant is identified by 88 percent of women employed in Saudi Arabia as important to helping them thrive in the workplace, according to an Accenture survey. However, just 25 percent say it's a top priority for their employer—compared with 32 percent of their peers globally.

“I would like to see women to have more of a growth mindset, persistence, acceptance of failure, and self-confidence. This can be done by providing them with training.”

VP Technology, ~45 years old

Simply providing training alone is not enough to drive better outcomes for women or their employers. But in environments where training keeps skills relevant; where delivery formats are flexible; and where leaders empower employees to take it, women's ambition and confidence is 14 percent higher. Employee innovation mindset also rises by four percent.

The relevance of training is key. Several interviewees identified soft skills development as a key area of focus for women. For example, a female entrepreneur told us that many women are not “exposed to dealing with the opposite sex [so] they don't know how to talk [to them].” A local NGO leader said developing the necessary “self-confidence” to overcome her “fear” of dealing with men had been the biggest challenge in her career to date.

Businesses can help women build these skills as they transition into and up through the organization. For example, when a research team designed a 12-week blended online/classroom course to help women improve

‘socioemotional skills’ using the *Doroob* platform, women's work-ethic scores increased by 50 percent and their organizational skills by 67 percent.^{lxxvii}

The mode of delivery is also important. If training is offered only at certain times, in certain places, then women are likely to be disadvantaged given the burden of household management responsibilities they shoulder. Our data shows that in environments where training is available at anytime and anywhere through digital and other formats, the ambition and confidence of female employees is seven percent higher—and the innovation mindset of all employees rises by two percent.

And once again, the tone from the top is crucial. Women must know that training is not only available—but that senior leaders want them to take it. Where leaders encourage employees to pursue training/learning opportunities, women's ambition and confidence is 17 percent higher.

Case study: Saudi Aramco

In 1964, Najat Al-Husseini, a graduate of the University of Damascus, joined Saudi Aramco—the first college educated Saudi woman to do so. She paved the way for many other women to join the company, first in health care and educational roles, but subsequently into almost every department.^{lxxxiii}

Today women are employed as engineers in the field and in plants, scientists in the Company's R&D centers conducting innovative research, inventors coming up with new processes and products, and traders selling products to customers around the world.^{lxxxiv} The proportion of women in the workforce has doubled to 4.9 percent over the past decade^{lxxxv} and women make up 20 percent of new recruits.^{lxxxvi} Aramco also appointed Lynn Laverty Elsenhans to its board of directors in 2018 and Marwa al-Khuzaim as the first woman to head an overseas office in 2019.

“Saudi Aramco has a history of 85 years in the empowerment of women”

Amin Nasser, CEO^{xc}

Building on this strong history of women working alongside men, the focus has now shifted to ensuring that women are able to thrive in the workplace. Colin Sloman, Director of Talent and Leadership, explained to us: “The traditional approach to diversity and inclusion focuses on trying to ‘fix’ women so they can operate in an environment designed for men. We are now adapting our organizational culture, so inclusion becomes the natural thing.”

Aramco's actions in three areas stand out:

Elevate female leaders

- Saudi Aramco introduced Women in Leadership programmes^{lxxxvii} to help more senior women in their organization cultivate their unique leadership styles.
- Women are given the opportunity to lead on the frontlines;^{lxxxviii} some are responsible for planning entire refineries,^{lxxxix} while others are leading ground-breaking research on smart materials^{xc}

set up the Women in Business initiative for employees at early stages in their career, helping them pick up skills such as negotiation and the ability to convey presence in meetings^{xcii}

- Mentoring schemes have helped give women more nuanced support. Younger women in the organization are partnered with more senior people to support them as they navigate the organization

Invest in targeted training

- Saudi Aramco sponsors women's education, expanding the talent pool from which they can recruit. For example, women account for a third of the overseas scholarships provided to students to study courses such as engineering^{xciii}
- Training is also designed to build the right soft skills. In 2010, Saudi Aramco

Safeguard against discrimination and harassment

- Employees reporting discrimination and/or harassment are protected from retaliation and can choose to remain anonymous
- Managers are held accountable for following up on reported instances of misconduct

Case study: Saudi Industrial Development Fund

Less than three years ago, there were no women working at the Saudi Industrial Development Fund (SIDF). Today 16 percent of its 890-person workforce are female; these women hold positions up to senior management across almost every department.

Noor Hassan Shabib, VP—Strategic Planning and Business Development, identifies three key drivers behind this remarkable growth. Firstly, the entire management team appreciates the importance of greater diversity, both from a social and a corporate perspective; “our CEO, and the CEO before him, both had the vision and then set the tone for change,” Noor Shabib says. Secondly, women were hired into key positions, such as head of HR and head of recruitment, helping to reinforce the importance of attracting female talent within the broader diversity and talent management strategy. And finally, changes in national direction and cultural norms supported the push to hire more women.

Now that inclusion and diversity are part of SIDF’s corporate culture, hiring criteria have been set to fairly and effectively evaluate candidates with different but equal experiences. The organization has also gradually eliminated barriers to women building their professional networks, for example by ensuring that employee resource group management teams are gender-balanced. Now the focus is on creating a truly diverse workforce organically by focusing on “creating an environment which is inclusive, and where both men and women can grow,” Noor Shabib added.

SIDF’s key areas of focus include:

Targeted training

- Training is made available for everyone—not just for people in specific

roles— and leaders are asked to ensure equal opportunity for women and men on each program

- Nokhab is a training program which has been running for over 40 years, providing employees early in their career with advanced business, HR and engineering qualifications. Two years ago, SIDF set a 50:50 gender target on the program and Noor Shabib says “women have proven their capabilities to create a significant impact.”

Working day flexibility

- Even before the Covid-19 pandemic, SIDF offered flexible start and finish times to allow employees to manage other commitments
- Now, a new flexible working policy – importantly, available to every employee – is being developed, following the successful switch to virtual working during the crisis

Parental leave

- SIDF offer 17 weeks of fully paid maternity leave, a 70 percent increase on what’s required under current labor laws; if a child has special needs, an extra month of fully paid leave is provided
- Mothers of children under six can apply for subsidized childcare and ‘travel companion’ tickets for long business trips
- Regular employee communications stress the importance of family and reaffirm support for the roles played by both women and men in caring for children and the elderly

Dismantle remaining barriers to female participation in the labor force

The ability of organizations to help women thrive in the workplace cannot be completely divorced from existing legal and societal frameworks. Despite progress shown in Part 1 to revise laws which disadvantage women, they are not yet fully equal in the eyes of the law. Similarly, while social norms are shifting rapidly, deeply held cultural mores rarely evaporate overnight.

The leaders of organizations can play an important role in both safeguarding—and accelerating—legal and societal changes which benefit women. This can be achieved in many ways, such as by speaking out against specific barriers women face; role modelling culture change; and pushing their organizations to ‘do more’ for women than is required by law.

1. Legal barriers

Gender equal laws are a key foundation on which to build more equal workplace cultures. KSA has made incredible progress in the WBL rankings over recent years (see Part 1), but still ranks in the bottom third of countries analyzed by the World Bank.⁵ Barriers which might limit the ability of women entering and then thriving in the workplace remain in areas such as the jobs women may hold; parental leave; inheritance rights; and divorce laws.

Saudi law states that women may not work in “hazardous jobs or industries” which are “(un)suitable to their nature”.^{xciii} This prevents organizations from recruiting women into many physically demanding roles. Women’s opportunities are further limited by a law which prevents them from working after 11pm in certain industries.^{xciv}

As discussed above, parental leave is a key cultural enabler of women’s ability to advance and thrive in the workplace, but current provision meets neither the World Bank’s criteria for length of maternity leave nor public funding of benefits. And unequal inheritance laws could also limit a woman’s ability to pursue education or a career; start her own business; or run a family-owned business.

⁵ KSA ranks 130 out of 190 with an overall score of 70.6.

Key legal gaps in KSA

Bolded text = equal laws; Plain text = unequal laws

Pay Job restrictions / Gender wage gap	Equal remuneration for work of equal value	Same night hours as men**	Work in dangerous jobs	Jobs deemed hazardous
Parenthood Laws affecting women's work after having children	14 weeks paid leave for mothers	Govt. administers 100% of maternity benefits	Paid leave available for fathers	
Assets Gender differences in property and inheritance laws	Equal rights to immovable property	Sons and daughters have equal inheritance rights	Male and female spouses have equal inheritance rights	Equal administrative authority over assets during marriage
Marriage Legal constraints related to marriage	No legal provision that a married woman has to obey husband	Woman can be "head of household / family" in same way as a man	Legislation addressing domestic violence	Woman can obtain divorce in same way as a man

Source: World Bank, 2020; further analysis by Alnahda and Accenture

*Since the publication of the WBL report, KSA has made amendments to address some of the outstanding indicators.

**At the time of publication of WBL 2020, women were barred from working night hours. A recent amendment lays out exceptions where this is permitted.^{lxvi}

2. Societal barriers

Rapid progress in KSA is also being challenged by social norms around gender roles built up over generations. The development of such views and opinions is “often measured in generations or centuries”^{xcvi}; we would not expect resistance to melt away overnight. And, as demonstrated in the Alnahda Takafu Index, these social stigmas play a significant role in limiting women’s horizons.^{xcvii}

“Even as a woman, I had my own prejudice: I had two girls that were reporting to me. I was nervous about managing them; I thought that a man would be able to handle them better [but] that was a big mistake on my part.”

Senior pricing manager, ~35 years old

One such norm is the traditional division of household responsibilities in KSA; men are expected to take care of their family financially and women are responsible for household management. This may contribute to the relatively low numbers of tertiary-educated women in KSA who enter the workforce. The issue is certainly not a lack of educated women: the tertiary attainment rate for women (23 percent) is only a fraction below that of men (24 percent).^{xcviii} However, while 94 percent of these men go on to find employment, just 41 percent of the women do—the lowest rate among OECD and partner countries.^{xcix} For example, women have been allowed to study law since 2005, but the first female lawyer only began practicing eight years later.^c

Moreover, women may also lose out financially. Research by Alnahda suggests that men are likely to get greater returns on their education and professional experience, contributing to a wage gap of 43 percent (women earn 57 riyals

for every 100 riyals a man earns.)^{cic} In a separate survey of private sector employees, 45 percent of male employees attributed the pay gap to domestic responsibilities that women have outside work, while 41 percent selected women’s preference for flexible work.^{ciii} The Saudi Shoura Council has taken steps to narrow the gender wage gap which is estimated to have increased almost threefold between 2014 and 2016.^{civ}

However, interviewees reported that when it comes to bonus decisions, men are often favoured on the basis that they have “family finance responsibilities.”

Finally, social change often takes time to filter into the mainstream because people are nervous that ‘other people’ think differently. In a 2018 study of 500 married Saudi men, 87 percent said they believed women should be allowed to work outside the home (up from 75 percent in 2007),^{cv} yet 75 percent thought that their peers would disagree with the idea. Once the respondents were made aware of their peers’ responses, they were more likely to encourage their wives to apply for jobs.^{cvi}

Organizations can play a critical role in accelerating social change. It starts with making gender diversity a strategic priority, hiring and progressing more women, and championing female role models in the media, and in schools and colleges. As Noor Shabib of SIDF told us: “Change does not happen overnight; you have to build the foundations to allow culture to develop over time.” The benefits to the bold leader prepared to invest in getting started are simply too important to ignore.

PART 4

Workplace culture readiness assessment



Does the workplace culture of your organization allow women to thrive?

Take our readiness assessment to understand how your organization could help KSA meet its economic and social goals.

Elevate female leaders as role models	Safeguard against discrimination and harassment	Offer more workday flexibility for all employees	Enhance parental leave	Invest in targeted training
The organization has a gender diverse leadership team	Employee education seeks to drive wider, fundamental change in society	Employees have the hardware and software they need to work remotely	Male employees are encouraged to take paternity leave	Employees have access to training tailored to their specific career tracks
Progress on gender diversity is measured and shared	Reporting process is transparent, anonymous and safe	Managers work remotely and encourage others to do the same	Managers take parental leave	Managers encourage employees to take up training opportunities
Managers actively try to amplify the voices of female employees	Innovative ways to combat bad behavior such as allyship and data mining trialed	Managers respond positively to remote working requests	Employees that take parental leave are not penalized	Training is made available in a variety of formats e.g. digital

APPENDIX

Research methodology

Survey (Getting to Equal)

This report draws on surveys conducted for Accenture's Getting to Equal research series. The surveys were conducted online in October and November 2018 and 2019, and targeted employees in all types of job roles in organizations with 5 or more employees. In total, the data for Saudi Arabia is drawn from surveys of 1,700 employees, of which 747 were women. 700 surveys were completed in 2018 for the report published in 2019: Equality = Innovation; and 1000 surveys were

completed in 2019 for the 2020 report: The Hidden Value of Culture Makers.

The questionnaires were constructed after extensive research (academic papers, literature search and drawing on Accenture's experience with clients) into the personal and workplace factors that are believed to influence the likelihood of women advancing at work. Through the questionnaire, we identified and measured more than 200 factors.

Model (Getting to Equal)

We used an econometric modelling methodology developed over the past three years of Accenture's Getting to Equal research series to quantify the relationship between 200+ workplace culture factors and three workplace outcomes: women's advancement; women's ambition and confidence; and employee innovation mindset.

In addition to empirically connecting these outcomes to each of the culture factors, the modelling framework also facilitates the measurement of the links between these outcomes and employee exposure to more (in the top 10 percent of the distribution) and fewer (bottom 10 percent) factors that drive workplace inclusion ('More equal' and 'Less equal' organizations).

The model controls for a range of workplace and employee background characteristics such as organization size, industry, age, gender and education which could also impact the outcomes.

Advancement

A logistic regression model is used to estimate the potential impact of 200+ culture factors on women's advancement.

Ambition and confidence

Accenture identified and aggregated 12 variables from its survey which describe how employees 'feel' within their organizations. These are listed below:

- Satisfied with their pace of advancement in organization to-date
- Likely to be working for current employer this time next year
- Love their job
- Able to advance at the pace they want in organization in the future
- Aspire to be promoted to the next level in organization

- Aspire to be in a senior leadership position in organization
- Feel contributions are appreciated and respected by peers
- Feel contributions are appreciated and respected by manager/supervisor
- Do not feel like an outsider
- Feel comfortable asking questions
- Do not feel questions/concerns are ignored
- Feel like a key component of their team with real influence over decisions

We then used the same approach as with advancement to identify the workplace culture factors that are significantly and positively correlated with women's levels of ambition and confidence – and their relative strength.

Innovation mindset

In 2019, we developed an assessment of an employee's 'Innovation Mindset' – or their ability and willingness to innovate. To do this, we devised 31 questions across six buckets:

- **Purpose:** Alignment around and support for the purpose of organization
- **Autonomy:** Being shown a clear mandate for change—and being trusted to follow through

- **Resources:** Having the tools, time and incentives necessary to innovate
- **Inspiration:** Tapping into networks beyond the organization
- **Collaboration:** Working with other departments or in fluid, cross-function teams
- **Experimentation:** Experimenting with new ideas quickly without fear of failure

We built a cross-country regression model to identify the strength and statistical significance of the relationship between workplace culture and employees' innovation mindset. As workplace culture becomes more equal, innovation mindset gets stronger.

To identify the potential impact on economic activity, Accenture combined its data with data from the World Bank, the International Labour Organization and Oxford Economics to model the relationship between innovation mindset and GDP (while controlling for other important factors such as labour productivity). This revealed a strong and robust positive link between higher innovation mindset scores and GDP growth. We used these relationships to estimate the impact on Saudi GDP over 2020-2030 if all employees worked in organizations that were as equal as the top 10 percent.

The factors positively and significantly associated with positive outcomes for women in KSA

Progressing women

- Leadership team is diverse
- Progress on gender diversity is measured and shared with employees
- Leaders encourage quiet/shy people to contribute in meetings
- Senior leaders give employees the freedom to fail in the pursuit of innovation
- Organization has made progress on building a workplace where no-one feels excluded
- Employees have the freedom to be the same at work as at home
- Employees have the freedom to be creative and innovative

- Internal employee resource/support networks (i.e., Women's networks)

Discrimination & harassment

- Employees feel comfortable reporting harassment to Manager/HR/Senior leader
- Employees feel comfortable reporting discrimination to Manager/HR/Senior leader
- Employees feel comfortable reporting unethical behaviour to Manager/HR/Senior leader
- Unethical behaviour is not tolerated
- Sexual discrimination is not tolerated

Workday flexibility

- Supervisors respond favourably to flexible working requests
- Organization respects employees' needs to balance work with other commitments
- Virtual/Remote working is widely available and common practice
- Organization provides flexibility over when and where employees can work
- Leaders set a positive example around work-life balance

Parental leave

- Encouraging women to take family leave is a priority for the organization
- A senior leader has taken 1+ months paternity leave
- Senior leaders encourage women to take parental leave

Qualitative

We conducted 12 in-depth interviews with women working (or looking for work) in Saudi Arabia to deepen our understanding of local cultural nuances.

Takafu Index

This report also draws on insights from Takafu, an initiative carried out by the Alnahda Center for Research. Meaning 'parity,' the Takafu initiative aims to establish KSA's first Gender Equal Opportunity index. In line with Saudi Arabia's Vision 2030, the Takafu initiative aims to support the vision and identify areas where policy makers can intervene and improve work conditions for men and women.

At this time, the scope of the Takafu Index measures gender gaps in the private sector only, covering formal and paid work for Saudis and non-Saudis. The Index does not include the labor force in the public or informal sectors. It also does not include self-employment, freelance or domestic workers.

Training

- Training is available anytime, anywhere through digital and other formats
- Training provides skills that can be used in current and future roles
- Company training times and formats are flexible
- Leaders empower/encourage employees to pursue learning/training opportunities
- Organization provides training that keeps skills relevant

We also spoke with representatives from three companies to build case studies of best practice. Our thanks go to Saudi Aramco, SIDF and Uber.

Domains and Subdomains

The Takafu Index is based on three main domains—participation, career development and compensation:

- **Participation:** The gap between the participation of men and women in the Saudi labor force. This domain comprises 2 subdomains: access and representation. Access measures the likelihood that women and men can gain employment, while representation measures the ratio of female-to-male shares of employment.

- **Career development:** The gap between men and women's decision-making power in the economy. The gender gap is calculated as the ratio of the share of women to men in managerial positions.
- **Compensation:** Gender inequality in labor market earnings by measuring the earnings gap ratio, which is the ratio of the female-to-male mean monthly salary.

These domains are aligned with the International Labor Organization (ILO) Decent Work Indicators, presented at the 18th International Conference of Labor Statisticians, December 2008. In particular, the Takafu Index corresponds to the statistical indicators under Equal Opportunity and Treatment:

- **Occupational segregation by gender**
- **Female share of employment in senior and middle management**
- **Gender wage gap**

The Takafu Index measures gaps at the level of industries and firm size.

Data

The data used in this report rely on three sources, administrative data, survey data and policy documents. The main source of administrative data is the General Organization for Social Insurance (GOSI), a public organization that is responsible for social insurance coverage for private sector employees. GOSI collects data on the labor force through regular reporting by private employers.

The second source, survey data, is collected by the Takafu team using two survey tools, one survey directed at HR managers within private companies and another survey directed at male and female employees within private sector firms.

The third source includes all laws, regulations, and information published by government entities relating to labor policies and programs.

Piloting Implementation

At this stage, the Takafu team piloted the surveys, whereby the sample was restricted to a set of 50 companies and 1,100 female and male employees. While the scope succeeded in targeting companies across all 15 industry categories, based on categories defined by GOSI, the sample was still not representative. Additionally, recruitment of employees who participated in the survey was limited to Saudis only.

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About Alnahda

Founded in 1963 in the city of Riyadh, Saudi Arabia, Alnahda is a non-profit organization dedicated to empowering women socially and economically through the execution of numerous projects and programs. Its work has evolved over the years in response to women's changing needs and to the local socio-economic and political climate. With a vision of women to be active partners in the development of Saudi society it has established its mission to work on ensuring an environment that takes pride in women's participation and preserves their dignity while building women's capabilities to reach leadership positions across society.

For 57 years, it has been committed to women's socio-economic empowerment through projects and services relevant to the developmental needs of the time. Alnahda has been instrumental in spearheading women's initiatives to include introducing female adult-education, providing

shelters and day-care, and running campaigns on preventing child sexual and physical abuse as well as raising awareness on the importance of civic participation in municipal elections. Today, Alnahda works in 3 main fields: local development, research and advocacy.

In June 2019, Alnahda was officially accredited by the UN Economic and Social Council (ECOSOC) as a non-governmental organization consultative. We work to ensure a social environment that values women's participation and preserves their dignity while building their capabilities to reach leadership positions.

For more information, visit <https://www.alnahda.org/>

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