

# MENA Women in Work Survey 2022: Young Women, Powerful Ambitions

Our 2022 survey of the professional experiences and ambitions of women aged 18 to 35 reveals high expectations but also frustration. We propose five key measures to help MENA employers unleash the talent of young women.

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# Executive Summary

In recent years, women in the Middle East and North Africa (MENA) have made unprecedented gains as a vital part of the region's workforce. A pioneering generation of younger women are more likely than ever to go to work and remain in employment to fulfil their career ambitions. They are highly educated and motivated, and are increasingly visible across the public and private sectors, from roles in policymaking and diplomacy to entrepreneurship and corporate leadership.

Their progress is momentous, but the region has yet to reap the full potential of women in the workforce. Only 40% of working-age women in Gulf Cooperation Council (GCC) countries are in employment, compared with 64% across the OECD<sup>1</sup>. In Egypt, Saudi Arabia and the UAE, the region's three largest economies, less than 20% of all senior managers are female.<sup>2</sup> Employers across the region must take a direct interest in understanding how to meet and support the professional aspirations of younger women through better diversity strategies and concrete actions, in order to attract and retain this next generation of talent.

With this goal in mind, in January 2022 we conducted a survey on attitudes to work among 1,500 women aged 18 to 35 across the following countries: Bahrain, Egypt, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, and the UAE. In total, these countries are home to around 81 million women and have a combined GDP of around \$2 trillion.<sup>3</sup>

## Our findings show that most young MENA women:

1. Believe they have skills to become leaders in their chosen field and organisation
2. Face an “expectations vs. reality” gap between their ambitions and their experiences of employers
3. Want to invest in upskilling themselves, but lack opportunities to do so
4. Value employers who offer access to training and development, a good work-life balance, and equal opportunities for career progression and mentorship



## To address the “expectations vs. reality” gap, employers must:

Embed diversity strategies throughout the organisation for the entire career lifecycle

Set diversity KPIs to measure change in areas such as parental leave and equal career progression opportunities, and incentivise organisational change

Reinforce the increasing acceptance of women in employment across MENA societies by promoting a welcoming and supportive workplace culture

<sup>1</sup> ILO data.

<sup>2</sup> Defined as the number of women in management as a percentage of employment in management. Employment in management is defined based on the International Standard Classification of Occupations (category 1 ‘total management’ of ISCO-08 or ISCO-88).

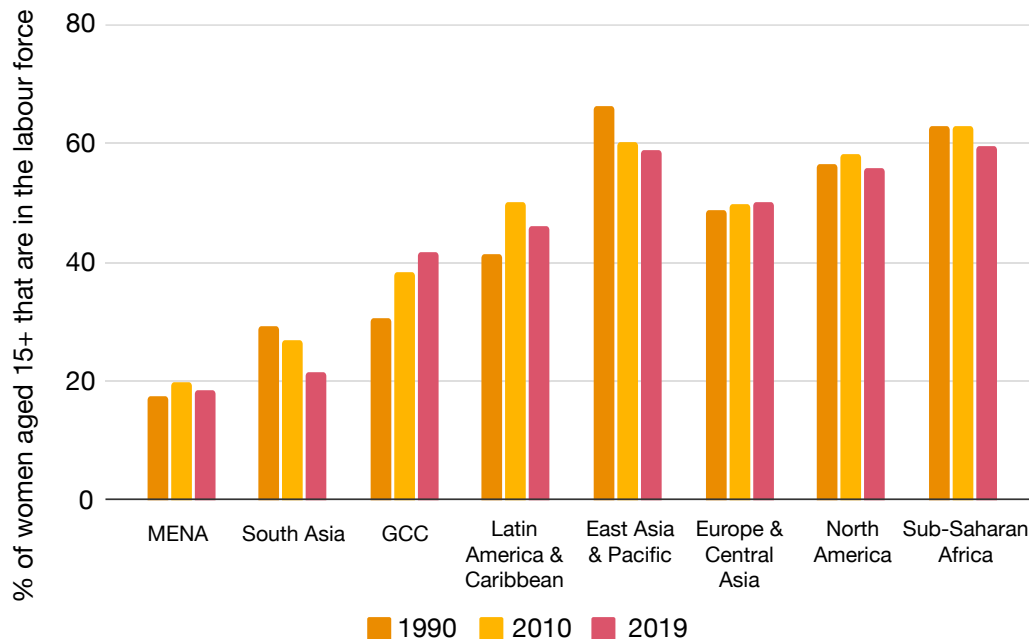
<sup>3</sup> World Bank 2019 data.

## Part One

# Young MENA women are advancing at work, but steep barriers remain

Young MENA women are more likely than ever before to be in work. The greatest advances in labour force participation in recent years have been achieved in GCC countries, particularly the UAE, Qatar, and Saudi Arabia.

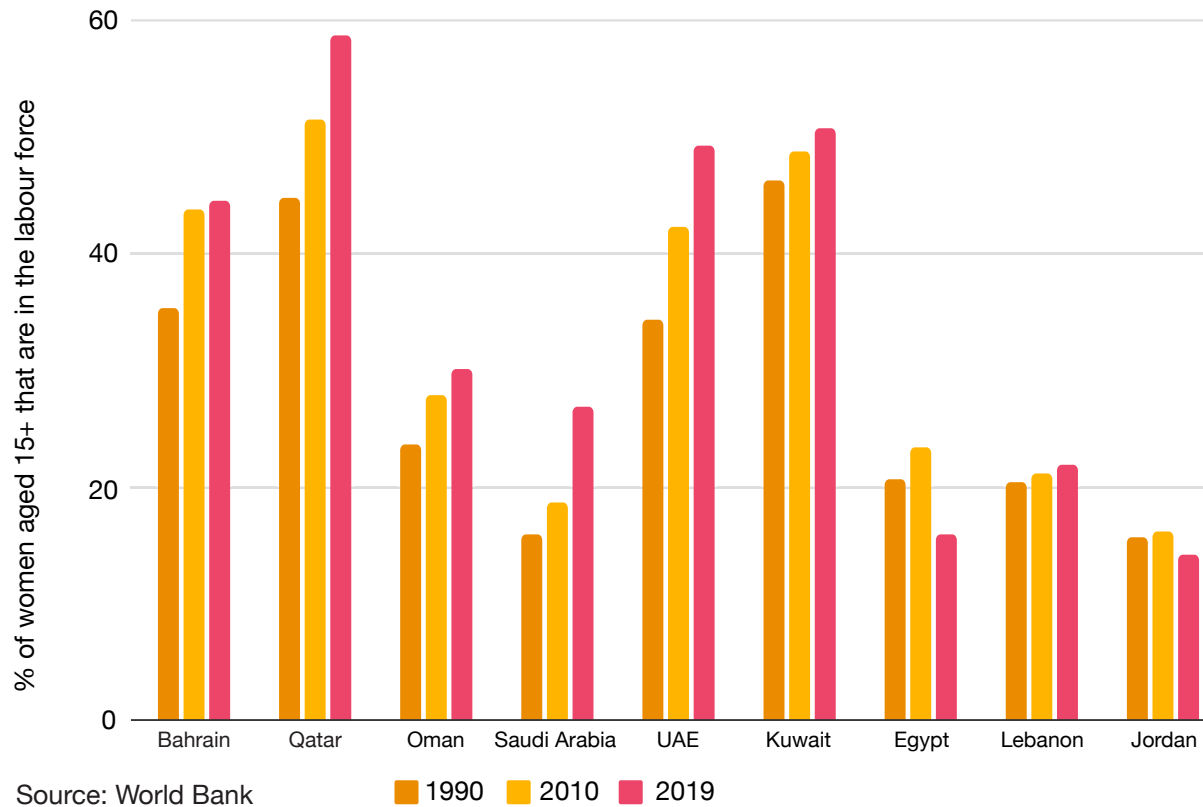
**Figure 1:** Global female labour force participation as a percentage of the female working age population



Source: World Bank



**Figure 2:** MENA region female labour force participation as a percentage of the female working age population



This progress is closely connected to the fact that MENA women are more highly educated than ever before. They are especially well represented in higher education in science, technology, engineering and maths (STEM) disciplines. For example, between 34% (Egypt, Saudi Arabia) and 56% (Oman) of STEM graduates are women, a much higher proportion than in the US (22%) or Europe (34%).<sup>4</sup>

The MENA region is also home to an increasing number of female entrepreneurs; in 2019, a study by ArabNet, a regional technology sector research and events company, suggested that between 10% and 20% of start-ups across MENA are led by women.<sup>5</sup>

However, there remains significant room for improving the employment prospects and career opportunities for young MENA women. Their increasing access to higher education is not yet matched by a proportionate rise in workforce participation. Furthermore, female representation at senior management levels remains low, because many women exit the labour market after marriage or having children.<sup>6</sup> In 2019 only 7.6% of managerial positions in Saudi organisations were held by women, while the equivalent figures for Qatar (13.9%), Lebanon (21.2%) and the UAE (21.5%) were also concerning.<sup>7</sup>

<sup>4</sup>STEM women, Women in STEM USA Statistics, 2021 women, and UN Women calculations using UNECE (United Nations Economic Commission for Europe). 2019.

<sup>5</sup> Arabnet, The State of Digital Investments in MENA 2013-2018 Report, 2019,

<sup>6</sup>Based on analysis of ILO data. For example, in the UAE, the labour force participation rate for single women is 64%, while for married (or cohabiting women), it is 54%. Similar patterns are observed in other MENA countries.

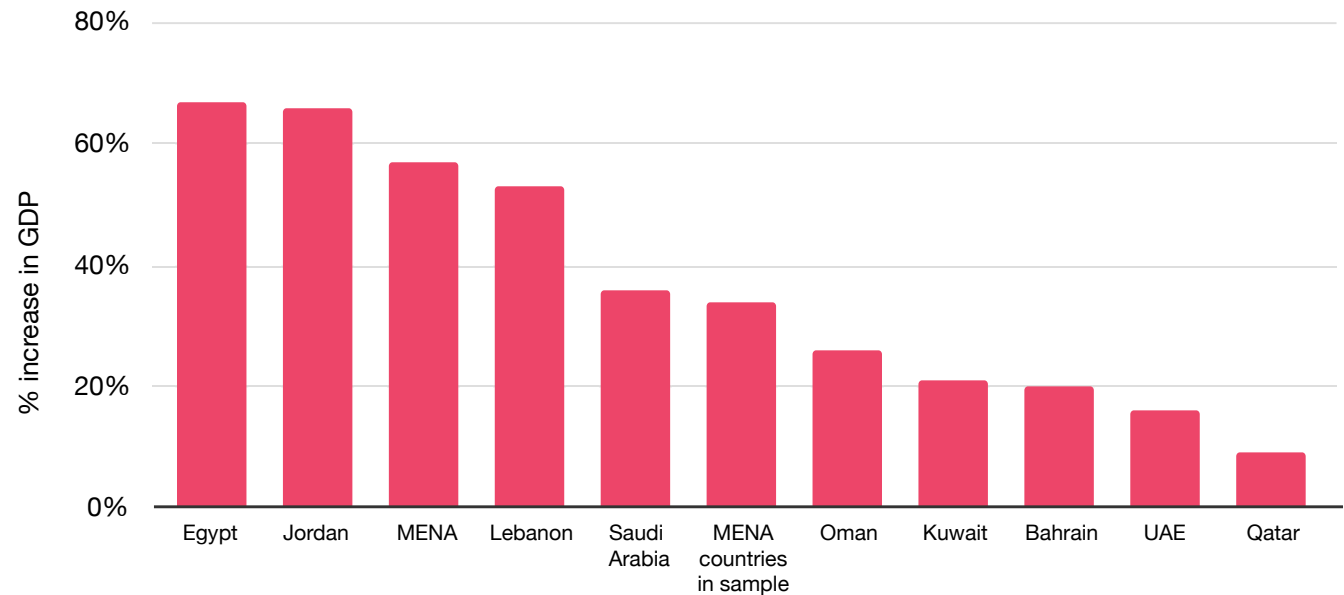
<sup>7</sup> ILO data.



This data matters for businesses, because a growing body of evidence indicates that greater diversity can improve commercial performance. In 2016, a global survey of 21,980 companies by the Peterson Institute for International Economics found a direct correlation between higher diversity and increased profitability.<sup>8</sup> In 2016 the financial index company MSCI found another correlation between having three or more women on management boards and increases in return on equity and earnings per share.<sup>9</sup>

For MENA countries, PwC analysis of World Bank data suggests that increased female employment participation could increase GDP across the MENA region by 57%, or as much as \$2.0 trillion (see Figure 3).<sup>10</sup>

**Figure 3:** Projected increase in MENA GDP with equal male and female employment rates



Source: World Bank data, PwC analysis



<sup>8</sup> Noland, Marcus et. Al, "Is Gender Diversity Profitable? Evidence from a Global Survey", Peterson Institute for International Economics, February 2016

<sup>9</sup> Thwing Eastman et al, "The Tipping Point: Women on Boards and Financial Performance", MSCI, Dec 16, 2016

<sup>10</sup> Strategy&, Women in Work Index 2021

For each country, we estimate the GDP contribution per worker (based on 2019 values) and multiply the GDP per worker estimate by the potential increase in the number of female workers if the female employment rate matched that of men.

## The financier – breaking down barriers to rise to the top

Born and raised in Saudi Arabia, Noelle dreamed of having a career and having an impact on the country. She started studying law, changed to finance and found her passion there. She spent her early career at PwC, working in a number of different roles in the deals and strategy teams. She gained experience across a number of different industries, working closely with clients to solve various challenges. This prepared her well for her next role as chief analyst at the Saudi Exchange in 2015.

Noelle credits Saudi Vision 2030, the nationwide economic development strategy launched in 2016, for opening up opportunities for women. At the Exchange, Noelle has been well placed to champion female empowerment. Her own career took off, first as manager of equity markets development, and then as Head of Markets Development, and then Chief of Cash Markets – a role that has propelled her into the executive leadership of the Exchange. Today, she is responsible for overseeing the trading business at the largest exchange in the region, which accounts for about 80% of volumes in the MENA and leads a team that is split 50/50 between men and women. With her glass-half-full attitude, she continues to find novel ways to make her mark.

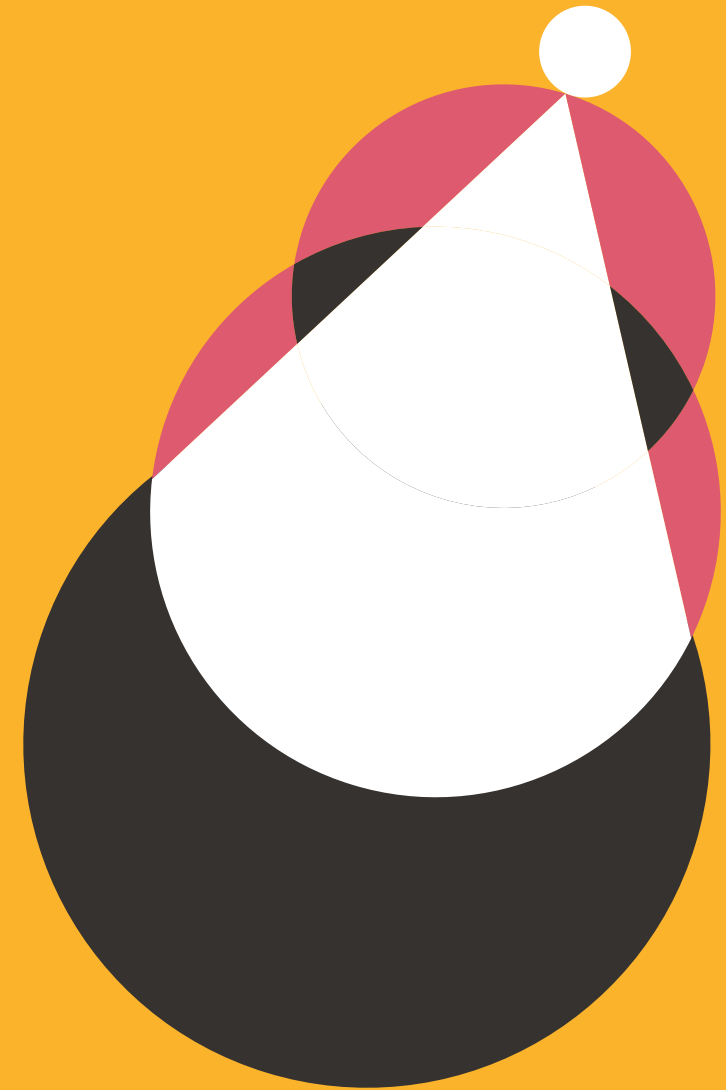
Her career highpoints are plenty – from presenting the Exchange’s achievements to Crown Prince Mohammed bin Salman and being showcased among the Nasdaq Women in Technology in Times Square to working on making the Aramco public listing, the world’s largest ever IPO, a success. Noelle’s rise is also indicative of the broader progress made in the Kingdom to advance gender equality; 20% of Saudi companies have at least one female director on the board, compared to 4% in 2018.

She also believes in giving back to the community, volunteering as an advisory board member for the finance programme at Prince Sultan University, her alma mater, and most recently working with Bloomberg’s A Fair Share, the media group’s initiative to promote gender parity.

Her impressive achievements are all the more so for how she has helped break down barriers for others. She also credits the positive impact that having a role model and mentor like Sarah Al Suhaimi, Chairperson of Saudi Stock Exchange, has had on her career. Noelle also pays it forward by dedicating herself to supporting and mentoring other Saudi women and lifting them to their full potential.

### Noelle Al-Jaweini

Chief of Cash Markets at the Saudi Exchange  
Saudi Arabia



## Part two

# Our findings – exploring young women’s attitudes to work and their careers across MENA

With the stakes so high for the region, our survey of 1,500 young MENA women aims to provide a better understanding of what motivates and frustrates them as they pursue their career ambitions.

Our respondents fall into two broad categories. Firstly, the 18-25 age group, who are mostly new to the workforce, single with no children and are less likely than older respondents to be primary wage earners in their households. They are mostly university-educated and hold junior executive positions. Secondly, women in the 26-35 age group tend to be married with one or two children, are more likely to be primary earners, and typically have middle or senior management jobs. They, too, are usually university-educated. To reinforce the survey findings, we also conducted eight focus group discussions with young women in the region.

## Main survey insights:

### What motivates young MENA women?

Financial independence was, by some distance, the most important factor motivating women to work, with 59% of respondents citing this as one of the top three reasons why they have or want a career. This was followed by personal development and growth (35%). Many women in our focus groups also spoke about wanting to emulate female role models and in turn inspire other women, including their daughters, to follow in their footsteps.

“I want to be a role model for my two beautiful daughters, so they can build their own future and be leaders in every area of their lives.”

“I want to challenge myself and society. In my country, having a career is seen as a bonus for women, because their main focus is the family. But a career is essential for me to have a bigger purpose in life and see the social impact I can make if I do my job well.”

# The entrepreneur – channelling design inspiration to improve lives

Learning about British-Iraqi architect Dame Zaha Hadid, the first woman to win the Pritzker Architecture Prize, changed Shosha's career path. Until then, she thought she might help to improve people's lives and the world around them by working in medicine or international relations. But inspired by Hadid's global success, she set on a path to become one of the most well-known interior and product designer in Egypt. Shosha brings an intellectual approach to her work, drawing on her heritage and culture to celebrate and re-interpret Egyptian furniture design. And she's succeeded. One of her chairs sits in the White House – reportedly one of the most valued gifts received by former First Lady Melania Trump.

Shosha has held true to her desire to improve lives, channelling her entrepreneurial spirit into her lighting company Annure (meaning 'The Light' in Arabic), to illuminate households in Africa. For each light fixture sold, Annure provides funding to light a home in Africa. To date, it has lit up 200 homes in Zambia.

Talent, drive and self-awareness have helped Shosha succeed. She has successfully defied stereotypes about what young women can do and achieve. She's turned clients that were initially sceptical about her capabilities and experience, into believers of young women's potential, including in male-dominated sectors like the military.

While Shosha hasn't followed a career path more traditionally related to improving humanity and life, her efforts have ultimately succeeded in driving and bringing about change: for herself, her clients, beneficiaries of the Annure project, and for those following in her footsteps.

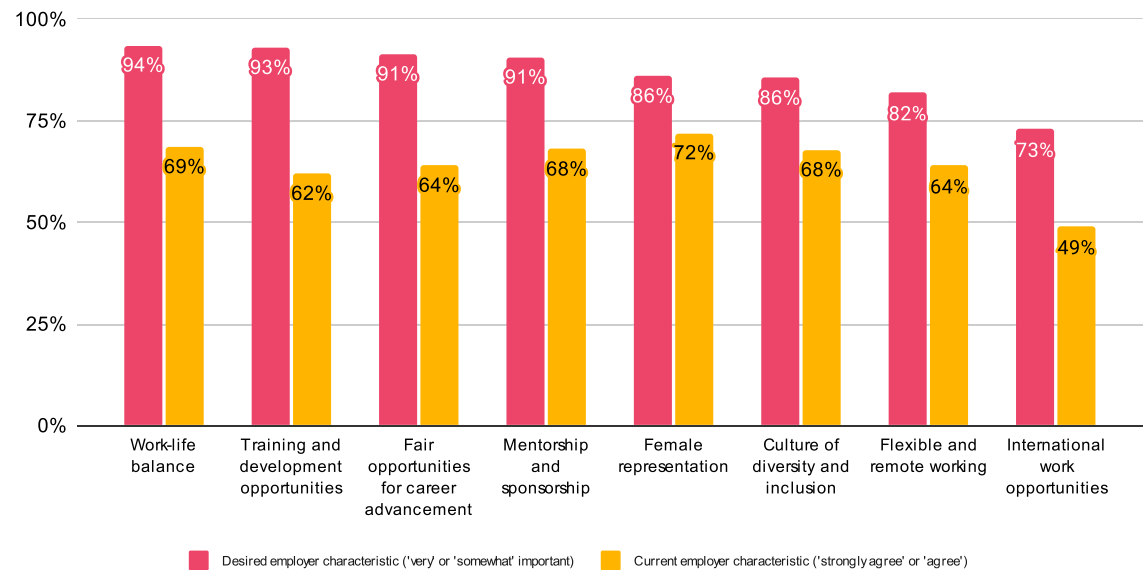
## Shosha Kamal Aboukheir

Founder & Design Director of Shosha Kamal Design House  
Egypt

## The expectations vs. reality gap

While young women are highly motivated and keen to make their mark in the workplace, their experiences of employers are falling short of expectations. Too often, the assurance that they will be treated the same as their male colleagues and given equal training, development and career opportunities, is not reflected in their actual experience. The rest of this section explains these challenges.

Figure 4: The expectations and reality gap



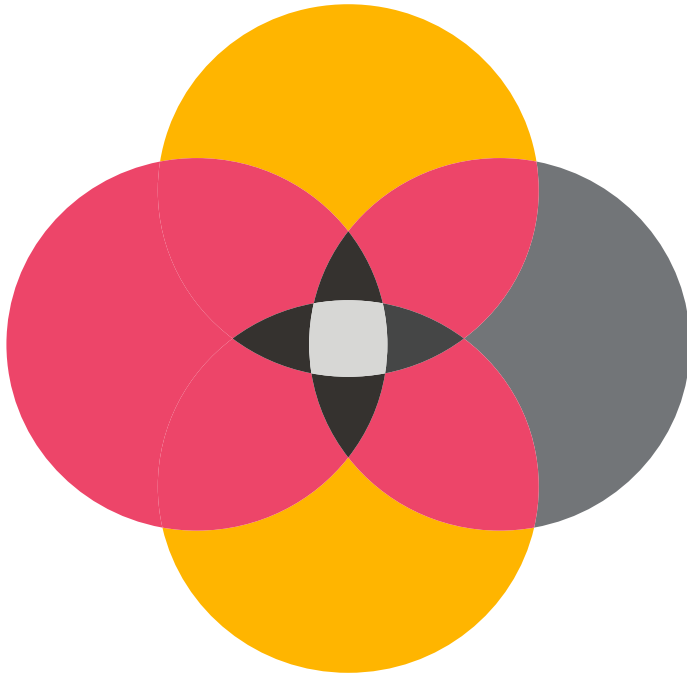
Source: PwC research



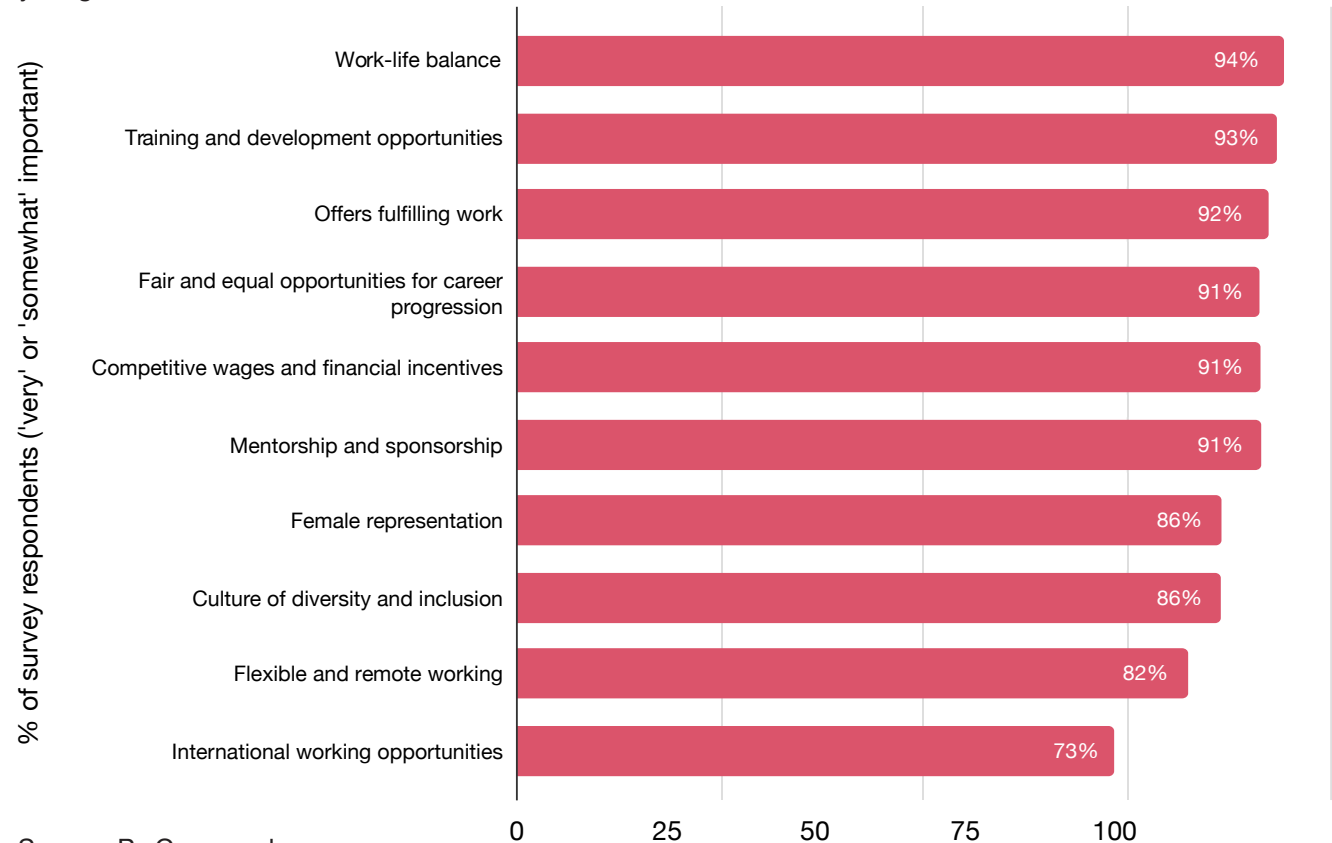
## The work-life balance: great expectations and great frustration

84% of respondents aspire to become leaders in their field, 80% are confident about their ability to lead others, and 86% believe they have the skills and experience to progress to the next level of their career.

However, work is not the only priority for young MENA women. Almost all of the survey respondents (94%) say they value employers who help them to achieve a work-life balance, while 80% feel it is important to play a leading role in looking after their families. This suggests that young women value their time outside of work, whether it is to maintain their own wellbeing, cultivate personal interests and their own development, or to fulfil their roles and responsibilities within their families.



**Figure 5:** Most valued employer characteristics for young MENA women



Source: PwC research

Some respondents (12%) say their current job does not provide a satisfactory work-life balance, with the problem especially acute in financial and professional services. In our focus group discussions, women with young children often said they struggled to cope with both work and family responsibilities, and effectively having to work two full-time jobs.

“I have this constant guilt about feeling like both an inadequate parent and an inadequate professional. And feeling like having to work twice as hard to prove my commitment and reliability as a working parent.”

## Training and development – young women lack access to training opportunities

93% of survey respondents say they value employers who offer them training and development opportunities, but only 62% say their employer offers training opportunities that are tailored to their needs. Similarly, while 91% of the women surveyed feel that mentorship and leadership is important to them, the proportion drops to 68% regarding whether their own workplace has this kind of supportive culture.

## Culture of diversity - young women still face a glass ceiling

Of equal concern is the fact that 86% believe they have the skills and experience to progress to the next level of their career, but only 67% think they can rise as far as they want with their current employer. The availability of female role models at senior levels is also an important form of motivation and encouragement for young women, a point emphasised in focus groups. However, only 72% of women think that there is adequate female representation at senior levels.



# The change agent - shaping the transformation of the region

From a young age, Hiba has had a deep interest in how governments work and their impact on people's lives. This passion for creating positive change has been a hallmark of her career. Today Hiba brings that same passion and purpose to her role as a partner within PwC's Government & Public Sector Consulting practice. In this role, she leads large-scale transformation projects and advises government officials on the social and economic policies driving forward national ambitions, entrepreneurship and job creation, while helping them innovate.

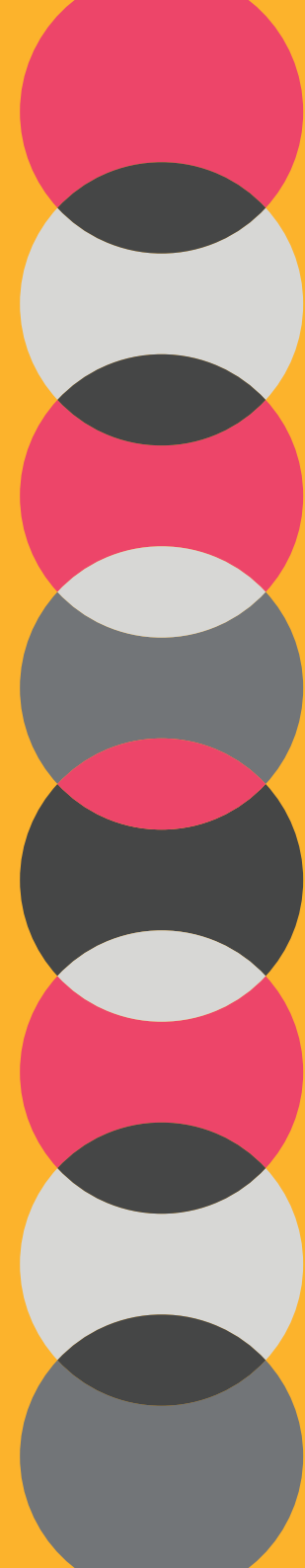
Hiba's path to partnership has served to break down the perceived barriers women face rising through the ranks. She credits her experience in the private sector, working in multiple geographies and exposure to different schools of thought. She was also willing to take brave risks to explore new industries and service offerings, as well as built strong relationships with governments, nonprofits and academic institutions as a trusted advisor. Her deep regional experience and technical expertise is also complemented by her background in public policy and administration and global politics, with master's degrees from Harvard Kennedy School and the London School of Economics. Hiba has also been a voice of regional development as part of World Economic Forum's Global Shapers Community, sharing best practices and collaborating with peers from all around the world.

Her deep sense of purpose and commitment to driving transformational change, creating a positive impact on people's lives and inspiring her teams through authenticity and transparency has contributed to her career growth, making her one of the youngest partners in the Government & Public Sector practice.

Hiba is someone who empowers and continuously finds ways to motivate young people. She believes women especially are often under more pressure to achieve in the professional sphere, and today she aspires to lead by example and inspire women to pursue career growth, assume positions of leadership and fulfil their potential. She feels that it is not only her ambition, but also her responsibility to build on the regional efforts to support women in access and career progression. She knows that women make remarkable leaders and is committed to coaching her female peers to achieve their full potential.

## Hiba Darwish

Partner in Government & Public Sector Consulting at PwC Middle East  
United Arab Emirates



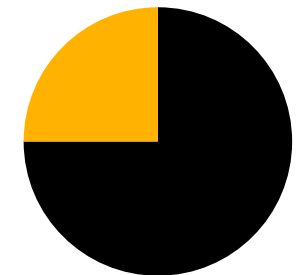
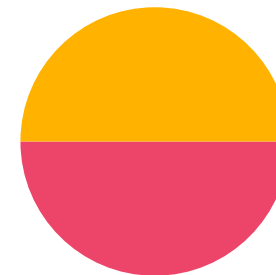
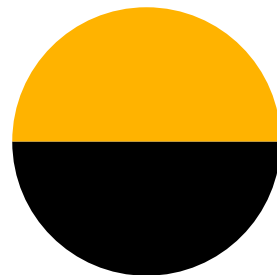
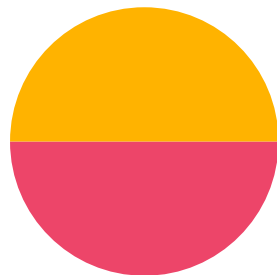
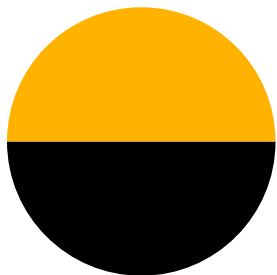
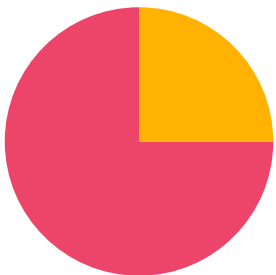
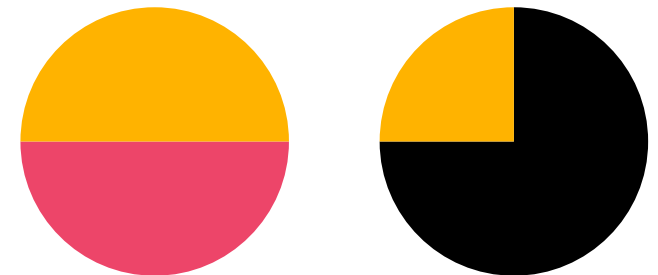
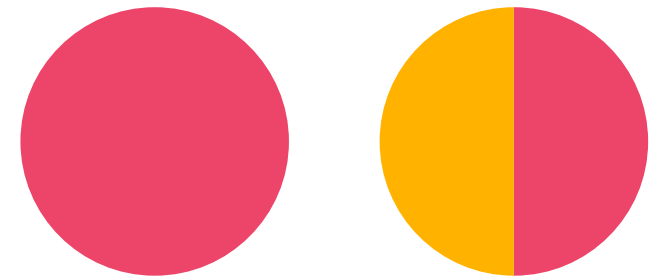
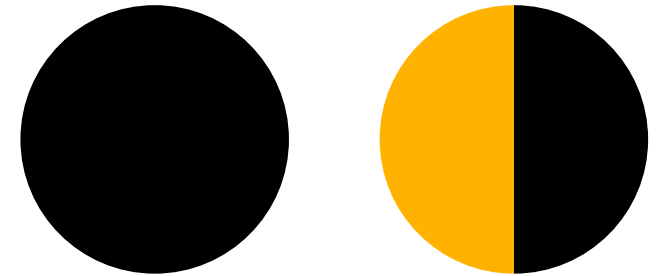
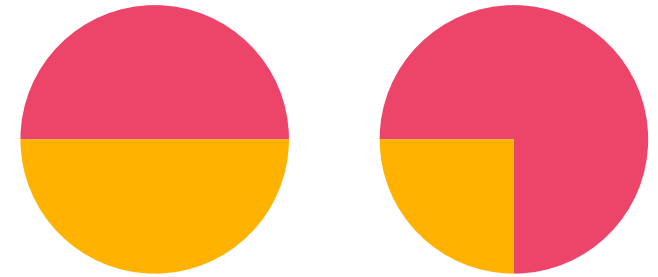
### Part three

# Five initiatives that MENA employers should take now to help young women close the expectations vs. reality gap

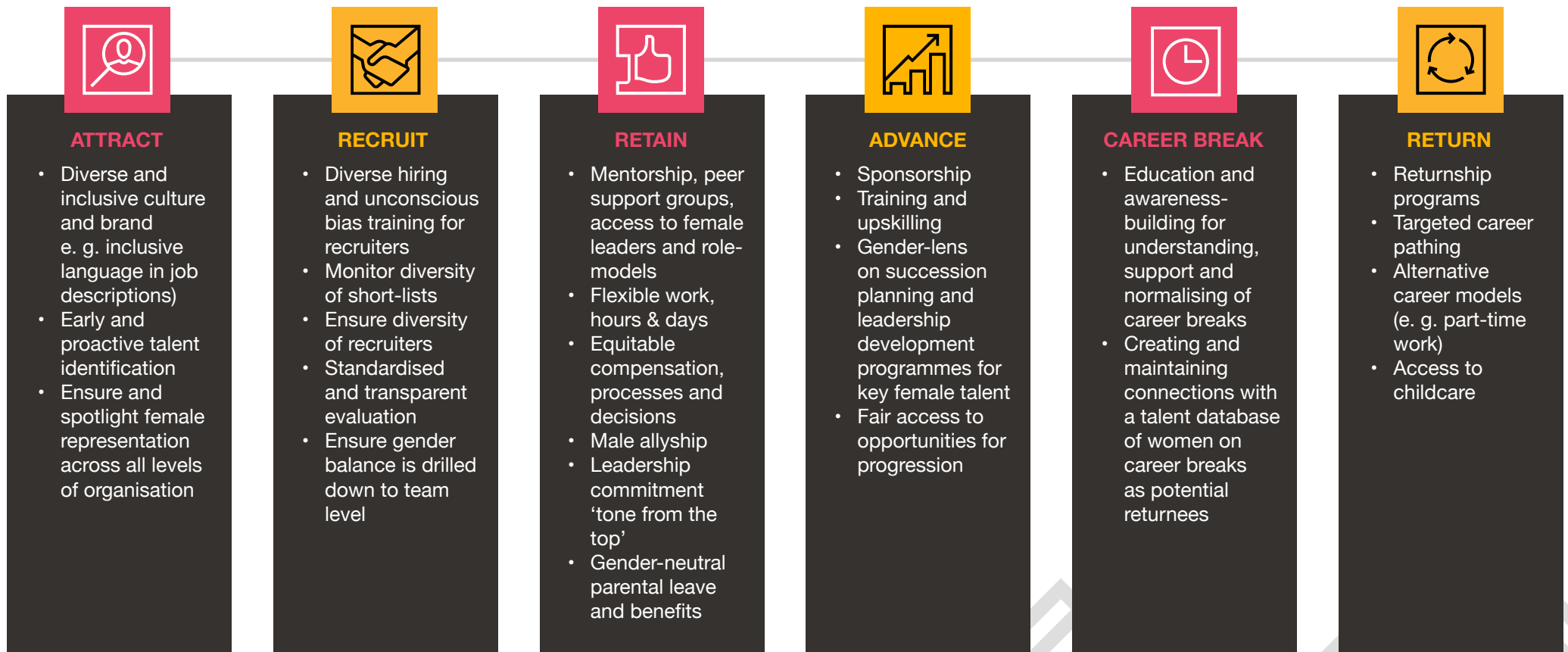
As our survey findings show, young women across the MENA region are justifiably impatient for fundamental changes in workplace practices and culture that will allow them to fully realise their career ambitions. Employers, too, should share the sense of urgency, because companies will benefit from realising the full potential of young women.

We have mapped a pathway that MENA employers can to follow to attract, retain, promote and support young women, including through maternity leave and other career breaks. For each stage in the pathway, employers should focus on a set of targeted actions.

The results from our survey also show that, apart from support for working mothers, both groups of young women - those aged between 18 and 25, and those aged between 26 and 25 - share very similar views on the employer characteristics that they value, notably investing in skills and training, having access to sponsorship and mentoring opportunities, and work-life balance. This suggests that focusing on these areas, in addition to targeted support for working mothers, could address the needs and priorities of most young women no matter which stage of life they are at.



**Figure 6:** Employers' pathway for young female employees



Here are **five key initiatives** that employers should put in place now to set change in motion as they embark on the pathway:

### 1. Invest in young women's skills

The region's transformation, underpinned by new technologies, is an opportunity for businesses to raise their productivity by offering women upskilling opportunities. Employers, policymakers and academic and training institutions should collaborate to identify skills needs and training curricula that can be targeted towards women to ensure that they develop future-ready skills. Building on the successful drive to boost the number of young women studying STEM subjects in university, employers can also create local pipelines of female talent who can join companies directly after graduation and jump-start their careers.

### 2. Reform male-dominated workplace cultures

Our survey and focus group discussions confirm that many young MENA women are held back in their careers by attitudes and practices that favour men. Women are more likely to endure microaggressions or unconscious bias from male colleagues. Men at work also tend to network with other senior men, while women feel less comfortable doing so. Employers need to engage with female employees to identify problem areas and reform male-dominated workplaces with unconscious bias training to make men aware of silent assumptions that they may have about their female colleagues, especially in situations involving offering work opportunities and in performance reviews, and provide guidance about how to change their attitudes.

Businesses should not underestimate the power of male allyship, and the impact that men in positions of power can have in working together to improve career opportunities for women, for example, encouraging women to contribute during meetings, being conscious of their own biases and challenging other people's biases. Male allies can also play valuable roles in mentoring and sponsoring young women (see below).

### 3. Embed equitable workplace policies and practices

**Key measures include:**

Ensuring that **sponsorship and mentoring programmes** provide equal access and opportunities to women employees

**"A sponsor or senior person at the organisation who will spotlight you and endorse your work can be game-changing for your career"**

Implementing **paternity leave policies** that shift expectations of caring responsibilities so they are more evenly split between men and women

**"Ironically, the best thing a company can do for new mothers who want to return to work is not to extend maternity leave but introduce and enforce paternity leave"**

Improving **support for working mothers and those returning from career breaks**. 46% of survey respondents have taken a career break, while 25% expect to do so in the next 12 months. Many fear they will return to lower paid roles.

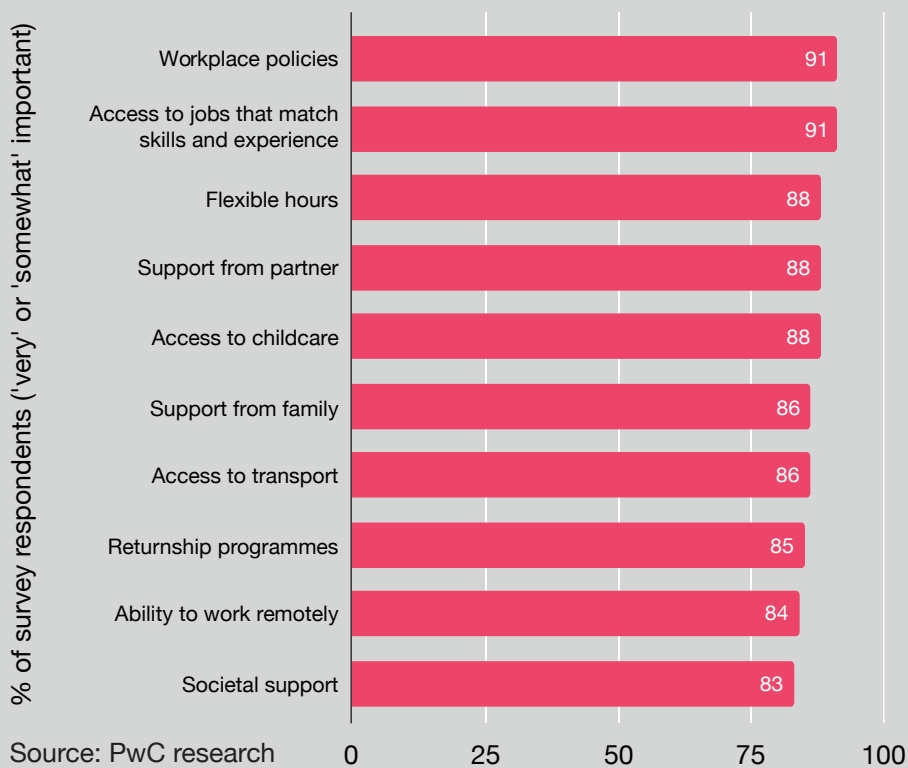
**"When I returned to work after maternity leave, I was offered an entry-level position"**

Strengthening **return to work programmes** for female employees who are returning to the workforce after a career break. 85% of respondents say "returnship" programmes are one of the top three factors that would encourage them to go back to work. By easing the transition back to work through networking opportunities and skills support, returnships can help women regain their confidence and professional self-belief.

**"After my career break, I'll choose an employer that helps me develop a growth plan and is invested in making that come alive."**

**Keep in Touch (KIT) days** where female employees on maternity leave are given paid days to reconnect with colleagues and stay up-to-date on business activities, networks and teams. Such efforts have had demonstrable benefits, such as easing a returning mother’s transition back to work, as well as improving the retention rate for returning female employees. A growing number of large MENA employers have begun to introduce KIT days, including PwC.

**Figure 7:** Most important factors enabling MENA women to return to work after career breaks




#### 4. Respect personal time and wellbeing

Almost all respondents say support for flexible working hours (and the ability to work remotely) and a good work-life balance are highly desirable characteristics in employers, while a sizeable minority have taken career breaks to avoid mental burnout (22%) and improve their physical wellbeing (21%). Companies should address these needs, for example by training managers to spot signs of stress and burnout such as consistent late-night work, evidence of exhaustion and lack of motivation. Female employees should be offered support through counselling, rebalancing workloads or encouraging wellbeing practices. This does not mean sidelining women by giving them fewer responsibilities – the so-called “mommy track” . Young women’s performance should also be judged on outputs and results, not time spent at work.

#### 5. Develop a clear strategy and metrics to measure progress in supporting young women

Businesses should invest the necessary time and resources to establish a brand and corporate profile that champions diversity, to retain and attract female talent. This must also be backed by action throughout the organisation. KPIs should be developed for all senior leaders and managers that measure their progress in supporting young women to advance their careers against clearly defined metrics at each stage of their career path.



# Conclusion: One goal, many routes – how to realise the full potential of young MENA women

The diversity of the countries, economies and populations across the MENA region calls for a targeted approach to address the barriers holding so many talented young women back from deservedly achieving professional success and fulfilling their career ambitions.

Our experience of operating a multi-country business in the region has yielded significant insights into the specific needs of young women in each country, and national areas for improvement. To take two examples, young women in Saudi Arabia particularly require female leaders and role models who can inspire them to reimagine the possible; while young women in Oman desire international exposure and networking opportunities to pursue new challenges. As these illustrations show, the career aspirations and needs of young MENA women cannot be addressed effectively with a one-size-fits-all monolithic strategy.

Against this complex, varied background, businesses in the region are only beginning to appreciate that their young female employees deserve special attention – not least, because releasing their full potential will boost competitiveness and profitability. At PwC Middle East, we have developed a strategic, country-level framework for women's inclusion and progression with coordinated actions that take into account the interconnected social, economic and cultural barriers which hinder their full participation in the workforce.

The benefits of getting it right when it comes to young MENA women in the workplace cannot be overstated. It will not only benefit the women themselves that realise their own full potential but also their employers, as well as wider society. Releasing the pent-up talent of the next female generation is a strategic and economic imperative to ensure the region can compete on equal terms internationally in a rapidly changing world.



## Contact us

### Norma Taki

Partner, Middle East Inclusion  
& Diversity Leader  
norma.taki@pwc.com

### Zina Janabi

Director, Inclusion & Diversity  
zina.janabi@pwc.com

### Jing Teow

Senior Economist and lead  
author  
jing.teow@pwc.com

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