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## Female Labor Force Participation in the Middle East and North Africa: Regional Trends and Lessons from Saudi Arabia

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# Female Labor Force Participation in the Middle East and North Africa: Regional Trends and Lessons from Saudi Arabia

## Abstract

Female labor force participation (FLFP) in the Middle East and North Africa (MENA) remains the lowest globally, averaging just 19% in 2023 compared to a global average of 48%. Social norms, care responsibilities, restrictive legal frameworks, skills mismatches, and limited access to supportive infrastructure continue to act as barriers for women's economic engagement. This paper examines the structural drivers behind these gaps and highlights the region's heterogeneity in barriers, outcomes, and reform trajectories. The paper highlights Saudi Arabia as a case of rapid transformation. Between 2017 and 2023, FLFP more than doubled following legal reforms, deployment of active labor market programs, and effective communication initiatives. Key drivers of Saudi Arabia's experience include expanded private-sector demand, sectoral diversification, and the correction of misperceived norms regarding women's employment. The paper also identifies remaining constraints for Saudi Arabia, including childcare gaps, mobility barriers, and public-private employment preferences and proposes policy recommendations for MENA countries, including legal reforms, care-economy investments, flexible work arrangements, and norm-changing interventions.

## JEL classification

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## Keywords

Female Labor Force participation, gender and labor markets, Middle East and North Africa, labor market reforms, Saudi Arabia

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## List of Acronyms

|       |                                                        |
|-------|--------------------------------------------------------|
| ALMPs | Active Labor Market Programs                           |
| COVID | Coronavirus disease                                    |
| FLFP  | Female Labor Force Participation                       |
| GCC   | Gulf Cooperation Council                               |
| GDP   | Gross Domestic Product                                 |
| HRDF  | Human Resources Development Fund                       |
| ICT   | Information and communication technology               |
| ILO   | International Labor Organization                       |
| J-PAL | Abdul Latif Jameel Poverty Action                      |
| KPIs  | Key Performance Indicators                             |
| KSA   | Kingdom of Saudi Arabia                                |
| LFP   | Labor Force Participation                              |
| MENA  | Middle East and North Africa                           |
| MHRSD | Ministry of Human Resources and Social Development     |
| NTP   | National Transformation Program                        |
| OECD  | Organization for Economic Co-operation and Development |
| SDB   | Social Development Bank                                |
| SME   | Small and Middle Enterprises                           |
| STEM  | Science, Technology, Engineering, and Mathematics      |
| TVET  | Technical and Vocational Education and Training        |
| TVTC  | Technical Vocational and Training Corporation          |
| UAE   | United Arab Emirates                                   |
| UIS   | UNESCO Institute for Statistics                        |
| UK    | United Kingdom                                         |
| UNDP  | United Nations Development Program                     |

## 1. Introduction

**The economic implications of women's participation, or lack thereof, in the labor market are profound.** Enhancing female labor force participation promotes gender equality and contributes to broader economic growth and resilience. The absence of women from the economy signifies an untapped potential, with significant losses in productivity, innovation, and economic diversification. Moreover, it perpetuates income inequality and hinders the achievement of poverty reduction goals. In contrast, economies that actively engage women in the labor force benefit from a wider talent pool, increased economic output, and more sustainable development outcomes.<sup>1</sup>

**There is abundant evidence showing economic losses stemming from gender inequality and potential gains from eradicating it.** Cuberes and Teignier (2016) find that eliminating women's entrepreneurship could reduce income per worker by about 10 to 11 percent. Likewise, eliminating female labor force participation could reduce income per capita by almost 47 to 50 percent. The cost of gender inequality seems to be the highest in the Middle East and North Africa (MENA), with an income loss of 38 percent in the long run. On the opposite, evidence finds that closing the gaps between women and men can have high positive impacts for countries. Aguirre et al. (2012) find that equalizing the female labor force participation rate (FLFP) with the male rates, can significantly raise a country's Gross Domestic Product (GDP). Moreover, Fiuratti et al. (2024) suggest that GDP per capita in the MENA region could increase by up to 50 percent in the long run if the substantial gaps in female employment are closed.

**In the (MENA) region,<sup>2</sup> female labor force participation remains alarmingly low, averaging 19 percent in 2023, starkly contrasting with a global average of 48 percent.** This enduring disparity is rooted in several complex barriers: deeply entrenched gender-unequal social norms, disproportionate burdens of unpaid care and domestic responsibilities, legal frameworks that reinforce gender discrimination, limited access of women to education and vocational training tailored to market demands, and a lack of supportive policies and infrastructure. These systemic barriers not only deter women from entering the labor force but also contribute to occupational segregation and persistent wage gaps, further disincentivizing their participation.

**Saudi Arabia's experience in significantly boosting FLFP in recent years provides a compelling case for analysis and learning.** Through a series of comprehensive reforms and policies, the Kingdom has managed to create an enabling environment for women's economic engagement, particularly in the private sector. The adoption of critical reforms in labor laws to eliminate employment discrimination, expansion of employment opportunities across various industries, and the emphasis on female participation in the labor force as part of Vision 2030 have led to a significant improvement in women's participation within a short time span.

**This case study underscores the importance of targeted policy interventions and the pivotal role of the private sector in advancing female labor force participation, offering valuable insights for similar**

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<sup>1</sup>Aguirre et al., 2012; Cuberes et al., 2016; Elborgh-Woytek et al., 2013 ; Gonzales et al., 2015; Hsieh et al., 2024; IMF, 2018; Keleher, and Franklin, 2008

<sup>2</sup> Defined, for the purpose of this note, and following the World Bank's practice: Algeria, Bahrain, Djibouti, Egypt, Iran, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates, West Bank and Gaza, Yemen.

**reforms in other countries of the MENA region and around the globe.** Saudi Arabia embarked on a reform journey starting in 2016, eliminating obstacles and enabling women to engage in all professions, to drive, and to benefit from improved maternity leave. These changes were complemented by enhanced programs to support women's employment, including job services, training, and childcare, which created a regulatory environment conducive to women entering the labor force. Additionally, the social climate was ripe for transformation, with families ready to support women's employment, hindered only by misperceptions about societal attitudes towards women in employment. Lastly, economic structural reforms, spurred by the Saudi Vision 2030 and the pandemic, have led to job creation by modernizing and diversifying the economy. This increased labor demand has been vital for women's participation in the labor force.

**The rest of this note is organized as follows.** Chapter 2 identifies key drivers and barriers for women's economic participation, before narrowing its focus to the MENA region in Chapter 3 to examine specific trends and challenges in the region. Chapter 4 offers a detailed case study of Saudi Arabia, highlighting the country's successes, strategies, and its persistent obstacles to increasing women's participation in the labor force. Drawing on Saudi Arabia's experience, Chapter 5 extends policy recommendations to the wider MENA region, aiming to inform and inspire similar advancements. The note concludes in Chapter 6 by weaving together the insights gathered, emphasizing the critical role of policy interventions and societal support in facilitating women's economic engagement and advocating for a progressive path towards gender equality in the labor market across the MENA region.

## 2. Global drivers and barriers to labor force participation

**Women worldwide face significant barriers to joining the labor market and participating in the economy.** These barriers include social norms and attitudes that perpetuate discrimination and unequal treatment of women, disproportionate burden of unpaid care work and domestic responsibilities, gender-based harassment and discrimination in the workplace, legal barriers, limited access to education and skills development, occupational segregation, challenges in accessing finance and resources for business ventures, and lack of or inadequate supportive policies and infrastructure. All these factors are highly interconnected and mutually reinforce each other in creating long-lasting barriers for women to enter the labor market, to participate in the economy, and to thrive in it. This can be observed by consistently worse economic outcomes for women when compared to their male peers, worldwide, and throughout history.

**Gender-unequal social norms play a significant role in constraining women's opportunities for employment and economic participation.** The traditional family model of the "male breadwinner" remains deeply embedded in societal norms, with women's caregiving responsibilities remaining central within the family structure.<sup>3</sup> Meanwhile men are encouraged to pursue careers and leadership positions. A rich body of literature describes how the perception of what the roles of men and women should be, affect all aspects of life, including politics, leadership, management, and how companies and institutions are designed.<sup>4</sup> These deeply ingrained norms and stereotypes dictate traditional gender roles and

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<sup>3</sup> International Labor Organization (ILO), 2018.

<sup>4</sup> Pearse and Connell, 2016; Alesina et. Al, 2013 ; Antecol, 2000; Goldin, and Rouse, 2000; Cameron, Dowling, and Worswick, 2001; Branisa, Klasen, and Ziegler, 2013; Muñoz Boudet, Petesch, and Turk, 2013.

expectations, perpetuating discrimination and unequal treatment in the labor market. As a result, women face higher barriers in accessing equal employment opportunities, career advancement, and fair wages.<sup>5</sup>

**Unpaid care work and domestic responsibilities continue to disproportionately burden women, leading to worse economic and health outcomes compared to men.** Women spend, on average, 3.2 more time than men on unpaid care work, which leads to women carrying out about three quarters of this type of work, in comparison to men.<sup>6</sup> Even in countries with the lowest gender gap in unpaid work hours, women still perform 20 percent more of this work than men.<sup>7</sup> Due to the disproportionate responsibility of care work placed on women, they face a dual burden when they decide to enter the labor force: balancing their job responsibilities with caregiving duties.<sup>8</sup> This results in time poverty,<sup>9</sup> hindering women's participation in the labor market and leading to their dropping out or experiencing worse health conditions when balancing work with caregiving responsibilities.<sup>10</sup> For instance, the presence of young children and elderlies in the household is consistently linked to reduced involvement of women in economic activities and employment.<sup>11</sup> Even for women who choose and are able to pursue paid work, occupational downgrading is common, due to the fact that jobs at lower skills or part-time allow them to better balance paid and care work.<sup>12</sup> Additionally, evidence consistently finds worst health outcomes for women who work without access to essential care services to alleviate this additional burden.<sup>13</sup> This unequal distribution of care work reinforces gender stereotypes and perpetuates gender inequality.<sup>14</sup>

**Misguided perceptions about women in the workplace often lead to gender-based harassment and discrimination, leading to unsafe or hostile workplaces.** Women who experience gender-based harassment in the workplace often face physical, psychological, and emotional harm, resulting in hostile and unsafe work environments.<sup>15</sup> On the employee side, this can lead to fear, anxiety, and a loss of confidence, causing women to withdraw from the labor force or limit their career opportunities.<sup>16</sup> On the employer side, this may cause women to be denied equal access to employment, promotions, and fair wages.<sup>17</sup>

**Social norms discriminating against women often become entrenched over time through legal frameworks.** This solidifies their presence, reinforces and perpetuates these norms, making them resistant to change. Globally, women have, on average, access to only 64 percent of the legal rights that

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<sup>5</sup> Reimers, 1985; Neumark et al., 1996 ; Altonji, and Blank, 1999 ; Fernandez, 2007; Campa, Casarico, and Profeta, 2011; Chatterjee et al., 2015; Kunze, 2018.

<sup>6</sup> Ahmed et al., 2023.

<sup>7</sup> Alonso et al., 2019.

<sup>8</sup> Kramer and Kipnis, 1995; and Sengupta and Sachdeva, 2017.

<sup>9</sup> Time-poverty being defined as the condition where individuals or households lack sufficient time to allocate towards activities that contribute to their overall well-being (producing goods, obtaining services, studying, or engaging in leisure and relaxation). It complements income poverty, recognizing time as a fundamental economic resource alongside income. (Williams, Masuda, and Tallis, 2016.)

<sup>10</sup> Hyde et al. 2020

<sup>11</sup> Christiansen et al., 2016; Das and Žumbyte 2017; Wang and Zhang 2018; Taş and Ahmed 2021; Ahmed et al., 2023.

<sup>12</sup> Connolly and Gregory, 2007; Garner et al., 2013; Alonso et al., 2019; Goldin et al., 2022a; Goldin et al., 2022b

<sup>13</sup> Bratberg et al., 2002; Schneiderman et al. 2005; Väänänen et al., 2005 ; Goldberg and Rickler, 2011; Angelov, 2013; and Schulz and Eden, 2016.

<sup>14</sup> UN Women, 2018 and 2020; ILO, 2018; UNESCWA, 2022.

<sup>15</sup> Johnson et Al., 2018.

<sup>16</sup> Folke and Rickne, 2022.

<sup>17</sup> Ferrary, 2018.

men do.<sup>18</sup> This translates into approximately 2.4 billion working-age women not enjoying the same legal rights as men. Legal frameworks often discriminate against women regarding marriage, property, reproduction, parenthood, access to the labor market, access to finance, and pensions.<sup>19</sup> This, of course, creates additional barriers for women to participate and thrive in the economy.<sup>20</sup>

**Limited access to education and skills, influenced by gender bias that funnels girls and women towards less valued market skills, results in unfavorable labor outcomes.** When girls and women face barriers in accessing quality education, they are often limited in their ability to acquire the necessary knowledge and skills for employment. For example, gender-based segregation in education, particularly in technical streams, significantly affects labor market outcomes.<sup>21</sup> Education at lower skills levels and in skills not in demand by the market further deepen inequalities.<sup>22</sup> This later results in occupational segregation, the concentration of women in certain industries and occupations, often characterized by lower wages and limited career advancement opportunities. This limits women's access to higher-paying and leadership positions.

**The above is highly connected with persistent wage gaps.** Wage gaps between men and women persist everywhere, with women earning less than their male counterparts for similar work.<sup>23</sup> Discrimination in pay and promotion opportunities not only contribute to economic inequalities but also discourage women's labor force participation, depressing female labor supply.<sup>24</sup> As explored above, social norms and care duties often push women to be disproportionately represented among part-time jobs, further exacerbates gender wage gaps, contributing to a cycle of gender inequality.<sup>25</sup>

**The lack of access to finance and resources significantly hinders female labor force participation and economic empowerment.** Across several regions, women still face barriers, often even legal, in accessing financial services, credit, holding assets and resources needed to start or expand businesses.<sup>26</sup> Here, too, social norms and gender bias can play a role in limiting this access.<sup>27</sup> This constrained access to resources restricts their ability to invest in education, skills development, and entrepreneurship.<sup>28</sup> Without adequate financial support, women may struggle to start their own businesses or access opportunities for career advancement. The lack of access to finance and resources also factors in the perpetuation of gender inequalities, as women are unable to fully realize their economic potential. Due to these factors, research consistently finds that financial inclusion in key for women's economic empowerment, reduction of gender gaps and better economic development.<sup>29</sup>

**The factors influencing women's labor market participation affect both the supply and demand sides of female labor force.** On the supply side, societal norms and caregiving responsibilities give rise to dual

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<sup>18</sup> World Bank, 2024b.

<sup>19</sup> Christopherson et al., 2022; World Bank, 2024b.

<sup>20</sup> Islam, Muzi, and Amin, 2019; Hyland, Djankov, and Goldberg, 2020;

<sup>21</sup> Sahoo and Klasen, 2018; Encinas-Martín and Cherian, 2023.

<sup>22</sup> Olivetti and Petrongolo, 2014; Encinas-Martín and Cherian, 2023.

<sup>23</sup> WEF, 2023.

<sup>24</sup> Jaumotte, 2003; Kinoshita and Guo, 2015; and Christiansen et al, 2016.

<sup>25</sup> Blau, and Kahn, 2017.

<sup>26</sup> Robino et al., 2018; Christopherson et al., 2022; World Bank, 2024b.

<sup>27</sup> Roy and Patro, 2022.

<sup>28</sup> Adera and Tariku, 2023.

<sup>29</sup> Deepa, 2014; Sandouka, 2016; Robino et al., 2018; George, 2018; Cabeza-García, 2019; Hendriks, 2019; Savitha, 2020.

burden of unpaid care work and professional responsibilities, limit women's availability and willingness to engage in paid work, leading to a constrained labor supply. Gender-based harassment, unequal pay, and hostile work environments can also disincentivize women from entering or remaining in the labor force. On the demand side, discriminatory legal frameworks, alongside misguided perceptions about women's roles in the workplace, contribute to employers' reluctance to hire or promote women. Occupational segregation and limited access to education and skills development, restrict women's job opportunities and career advancement, resulting in occupational downgrading and skills mismatch. Additionally, limited access to finance and resources for women looking to start or grow their businesses hampers entrepreneurial activities and economic empowerment, reducing the demand for female labor in higher-paid and leadership positions.

**These supply and demand factors are deeply intertwined, creating a feedback loop that perpetuates gender disparities in the labor market.** For example, the limited supply of women in the labor market due to caregiving responsibilities and social norms can reinforce employers' biases against hiring women, believing them to be less available or committed than men. Conversely, the demand-side issues, such as discriminatory hiring practices and occupational segregation, can discourage women from entering certain fields or the labor market altogether, affecting the overall supply of female labor. Together, these dynamics not only maintain the status quo of gender inequality in the labor force but also hinder economic growth by not fully utilizing the potential of half the population.

**The enablers, on the other hand, are policies and infrastructure that support women to participate, stay and thrive in the economy.** The lack of supportive policies that help countering, alleviating, and redressing the barriers faced by women perpetuates gender inequalities and makes it difficult for women to pursue employment opportunities and advance in their careers. Similarly, poor infrastructure and access to basic services further hinders women's economic empowerment by limiting their mobility and access to job opportunities. A large body of literature links higher female labor force participation and better jobs to better access to education, better parental leave schemes, protection against gender-based discrimination (including in pay), better access to finance and resources, available and affordable care services, flexible work opportunities and fair taxation.

**Policies that act on alleviating care burdens for women are proven to be effective in increasing participation and retention rates.** Better parental leave policies provide women who wish to have a family with lower opportunity costs when having children, eases managing their professional and family lives, and facilitates their re-entry into the labor force and back following the birth of a child.<sup>30</sup> As female labor force participation is sensible both to availability and affordability of childcare, policies that address these factors are highly connected to participation rates. Evidence finds that these effects are stronger for childcare subsidies and public provision (instead of child benefits) and for lower income families.<sup>31</sup> Similarly, part-time and flexible work options can help women more effectively balance work and family life, provided they wish to do so. However, it's crucial that pathways to full-time employment are also

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<sup>30</sup> However, too long maternity leave periods may deteriorate skills and lower future earnings and career opportunities (Jaumotte, 2003; Ondrich et al., 2003; Edin and Gustavasson, 2008)

<sup>31</sup> Blau, 2002; Jaumotte, 2003; Akgunduz and Plantenga, 2011; Steinberg and Nakane, 2012; Thévenon, 2013; Del Boca, 2015

available to prevent the trap of involuntary part-time work, which could widen the wage gap between men and women.<sup>32</sup>

**Policies that support women in having access to more and better resources to participate in the economy also show consistent positive results.** Better education acts on equipping women to participate in the labor market as well as raising women's potential earnings. It also provides them with incentives to do so.<sup>33</sup> Providing women with access to financial services, credit, and entrepreneurship resources enables them to launch and expand their businesses, fostering economic development, autonomy and reducing gaps in management positions.<sup>34</sup> Furthermore, research highlights that women's labor supply is notably sensitive to taxation. With that, high marginal tax rates can significantly diminish labor supply, with a more pronounced effect on women due to their more elastic labor supply.<sup>35</sup> Studies indicate that more neutral tax treatment for primary and secondary earners enhances female labor force participation by reducing disincentives.<sup>36</sup> Furthermore, make-work-pay strategies like the Earned Income Tax Credit have been effective in boosting employment rates among low-income individuals, especially single mothers.<sup>37</sup>

### 3. Trends and main challenges in labor force participation in the MENA region

**Female labor force participation in the MENA region remains notoriously low, with an average 19 percent for 2023, against a world average of 48 percent.** This is the lowest among all regions (Figure 1).<sup>38</sup> It is also the region with greatest gap in labor force participation, with men reaching 71 percent, against the 19 for women. This represents a gap of 52 percentage points, with the second place going to South Asia, with 45 percentage points of difference. The third place, for comparison, is Latin America, with less than half the number, at 24 percentage points difference between male and female labor force participation.

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<sup>32</sup> Kenjoh, 2005; Steinberg and Nakane, 2012; Christiansen et al., 2016

<sup>33</sup> Eckstein and Lifshitz, 2011; Christiansen et al., 2016

<sup>34</sup> Sandouka, 2016; Hendriks, 2019; Amin and Gomez Caceres, 2024.

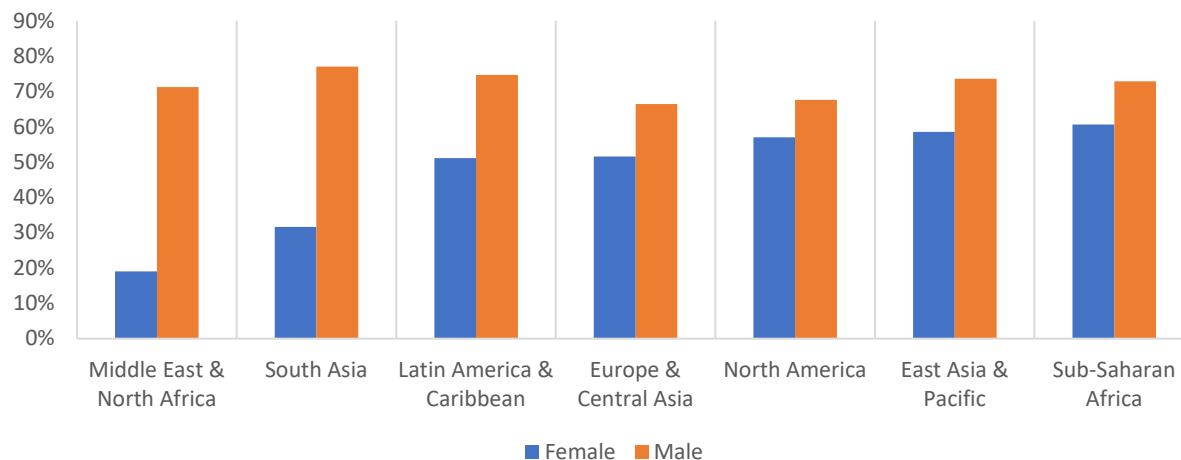
<sup>35</sup> Jaumotte, 2003

<sup>36</sup> Keane, 2011; Bick and Fuchs-Schündeln, 2014; Dao et al., 2014

<sup>37</sup> Meyer and Rosenbaum, 2000; 2001

<sup>38</sup> ILO, 2023

**Figure 1: Labor force participation rate by gender in 2023, ages 15+ (ILO estimate<sup>39</sup>)**

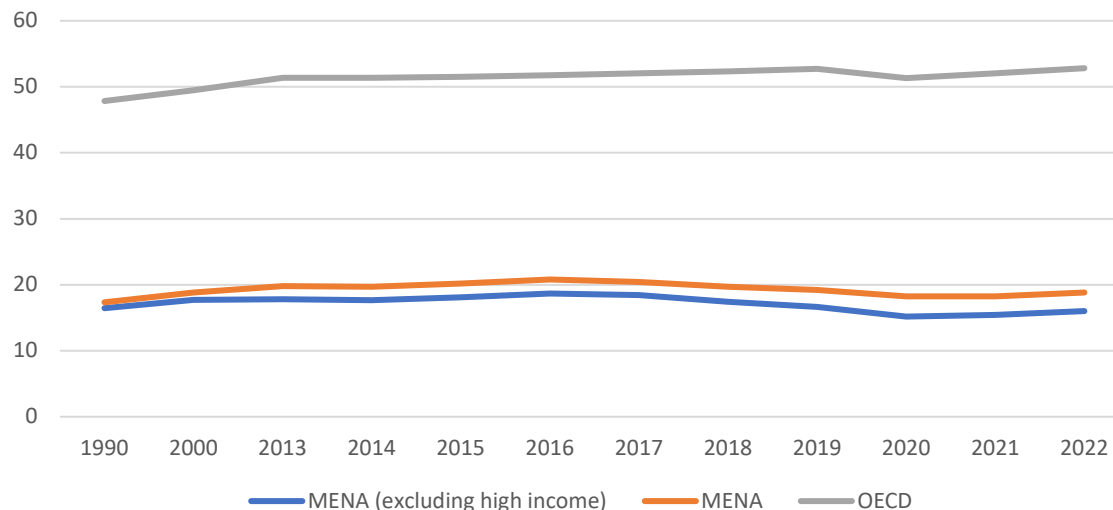


Source: ILOSTAT

**The labor force participation rate for women in the region has shown no significant change in recent history.** It has stabilized at around 20 percent in the early 2000s and remained near that level since then. A stagnant participation of women is not necessarily concerning, if the levels are high enough and most women out of the labor force have no desire or availability to work. Nonetheless, this does not seem to be the case of the MENA region, where participation of women is less than half of the participation in Organization for Economic Co-operation and Development (OECD) countries (Figure 2).

<sup>39</sup> "The LO modelled estimates provide internationally comparable labor statistics, including both nationally reported observations and imputed data for countries with missing data. The imputations are produced through a series of econometric models maintained by the ILO." ILO, 2023.

**Figure 2: Female labor force participation rate (15+)<sup>40</sup> - (ILO estimate).**



Source: World Development Indicators

**According to the World Value Survey, worldwide, social norms play a very important role when it comes to women's economic empowerment.** For instance, 34.1 percent of respondents from the World sample agrees or strongly agrees that it is a problem if women have more income than a husband (Figure 3.). Likewise, 32.1 percent of respondents also agree or strongly agree that men should have more right to a job than women when jobs are scarce. On views about women at the workplace, 34.6 percent of respondents either agree or strongly agree that men make better political leaders than women do. And 30.7 percent of respondents agree at some level that men make better business executives than women do (Figure 3).

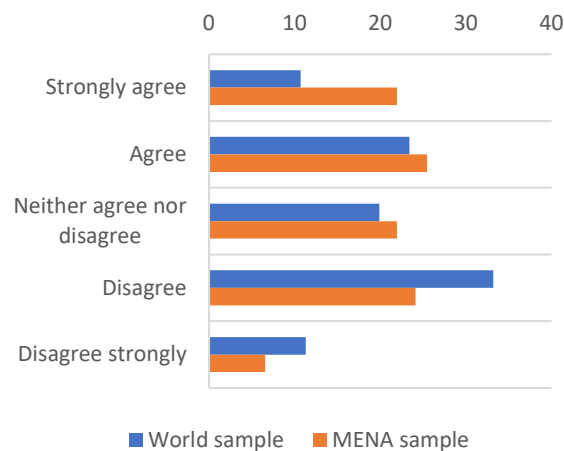
**Many of the obstacles hindering women's access to the labor market, common across various regions, are especially pronounced in MENA.** Traditional views that prioritize men's employment over women's, are very much present in the region. For instance, data from the World Values Survey from Iraq, Jordan and Lebanon reveals that the majority of population, that pre-school children suffer with a working mother.<sup>41</sup> When compared to global results, the survey data reveals more conservative views on gender and work and income in MENA. A larger proportion of respondents from the MENA region, compared to the world sample, agree (47.5 percent) that it is a problem if women earn more than their husbands. An astonishing 71.9 percent of MENA respondents also agree that men should have more right to a job than women when jobs are scarce. Likewise, 62.6 percent agree at some level that men make better political leaders than women do, and 52.8 percent agree that men make better business executives than women do.

<sup>40</sup> Data aggregates for the MENA region include Israel and Malta

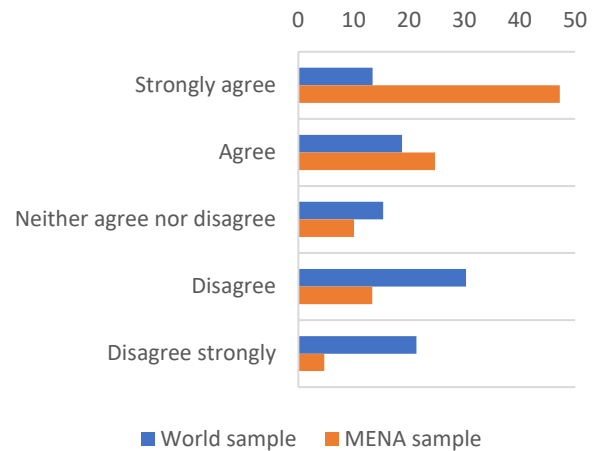
<sup>41</sup> Radaelli et al., 2023.

**Figure 3: Perceptions of women being in the labor force and entering employment, World Values Survey Wave 7 – 2017 to 2022.**

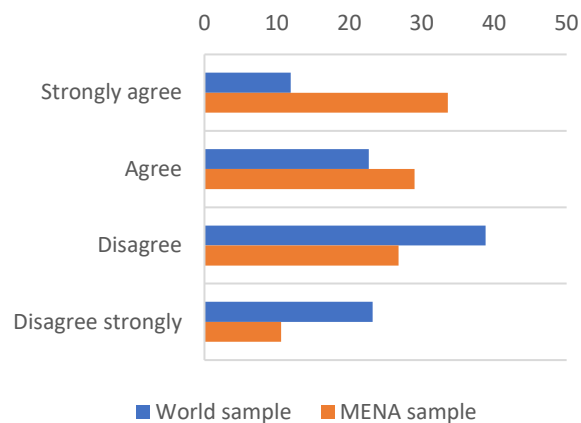
**Problem if women have more income than husband**



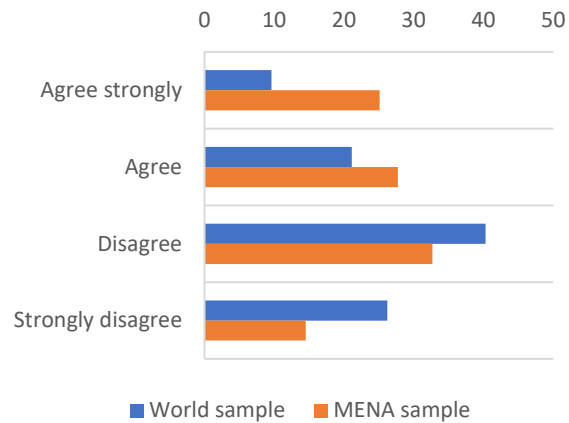
**Men should have more right to a job than women in a case of job scarcity**



**Men make better political leaders than women**



**Men make better business executives than women**

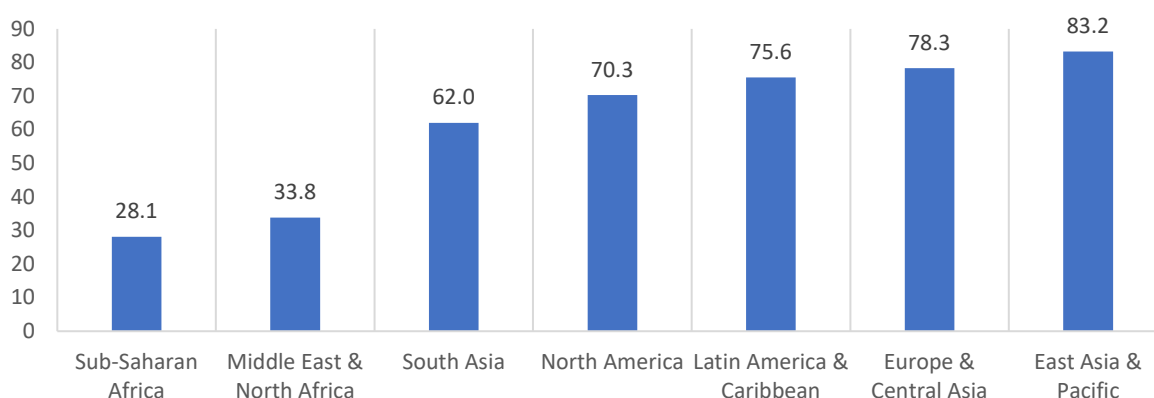


Note: World sample includes 155,642 respondents from Albania, Andorra, Azerbaijan, Argentina, Australia, Austria, Bangladesh, Armenia, Bolivia, Bosnia Herzegovina, Brazil, Bulgaria, Myanmar, Belarus, Canada, Chile, China, Taiwan ROC, Colombia, Croatia, Cyprus, Czechia, Denmark, Ecuador, Ethiopia, Estonia, Finland, France, Georgia, Germany, Greece, Guatemala, Hong Kong SAR, Hungary, Iceland, India, Indonesia, Iran, Iraq, Italy, Japan, Kazakhstan, Jordan, Kenya, South Korea, Kyrgyzstan, Lebanon, Latvia, Libya, Lithuania, Macau SAR, Malaysia, Maldives, Mexico, Mongolia, Montenegro, Morocco, Netherlands, New Zealand, Nicaragua, Nigeria, Norway, Pakistan, Peru, Philippines, Poland, Portugal, Puerto Rico, Romania, Russia, Serbia, Singapore, Slovakia, Vietnam, Slovenia, Zimbabwe, Spain, Sweden, Switzerland, Tajikistan, Thailand, Tunisia, Turkey, Ukraine, North Macedonia, Egypt, Great Britain, United States, Uruguay, Venezuela, Northern Ireland. MENA sample includes 9,886 respondents from Iran, Iraq, Jordan, Lebanon, Libya, Morocco, Tunisia, Egypt.

**Such beliefs, combined with the substantial time women dedicate to unpaid domestic and care work—significantly more than men—limit their ability to seek employment.** Like elsewhere in the world,

women in MENA bear the majority of care work when compared with men. For example, in Egypt, women spent 22.4 percent of their time in a day on unpaid domestic and care work, against 2.4 percent for men. In Morocco, this proportion is of 20.8 percent for women, against 3 percent for men; in Palestine, 20.1 percent against 3 percent; and in Algeria 21.7 percent against 3.8 percent. The gap between time spent by men and women in care and household duties for MENA countries are among the highest in the world.<sup>42</sup> This is also reflected by the very small enrollment rates in pre-primary care. The MENA region has one of the lowest enrollment rates for children in pre-primary education (Figure 4). Low enrollment rates indicate that children are taken care in the family setting, where women do most of this work, and therefore are less free to join the labor market.

**Figure 4- School enrollment, pre-primary (gross percentages), by World Bank region, 2020.**



Source: UNESCO Institute for Statistics (UIS)

**Deeply ingrained social norms and legal frameworks mutually reinforce gender disparities, making reforms challenging** (Figure 5). Notably, nine out of nineteen countries in the region,<sup>43</sup> legally restrict women's access to the same jobs and same shifts as men. Thirteen restrict women's access to jobs deemed dangerous. Furthermore, six countries lack laws against employment discrimination based on gender, including provisions against sexual harassment in the workplace. Additionally, in seven countries, there is no specific legislation addressing sexual harassment in employment, and eight lack criminal penalties or civil remedies for such harassment, underscoring the systemic barriers women face in entering and remaining in the labor market. Regarding wages, in half of MENA countries, there is no law mandating equal remuneration for work of equal value. In twelve of them, there is no legal provision for a maternity leave of at least fourteen weeks (as per ILO Maternity Protection Convention, 2000/ No. 183), in ten there is no paid leave for fathers nor prohibition of dismissal of pregnant women, and in eighteen there is no paid parental leave. These legal provisions reinforce the role of the mother as caregiver.

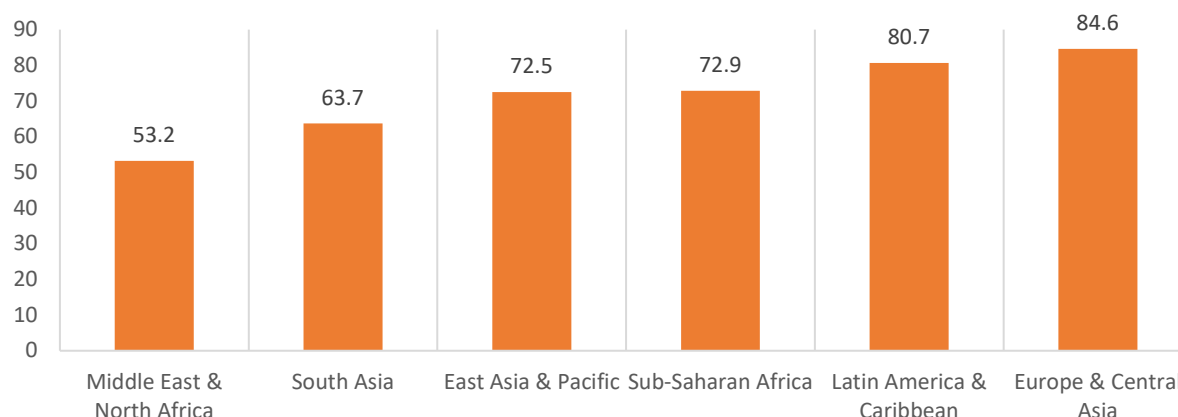
**Legal provision are also still major barriers for women in MENA to have access to assets and credit.** The absence of equal inheritance rights for sons and daughters, as well as for male and female surviving spouses, directly impacts women's ability to secure assets. Additionally, the fact that 11 out of 19 MENA countries do not prohibit gender discrimination in access to credit further compounds these challenges,

<sup>42</sup> Data from latest available years. Source: United Nations Statistics Division.

<sup>43</sup> Namely, Algeria, Bahrain, Djibouti, Egypt, Iran, Iraq, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syrian Arab Republic, Tunisia, United Arab Emirates, West Bank and Gaza, Yemen (World Bank, 2024)

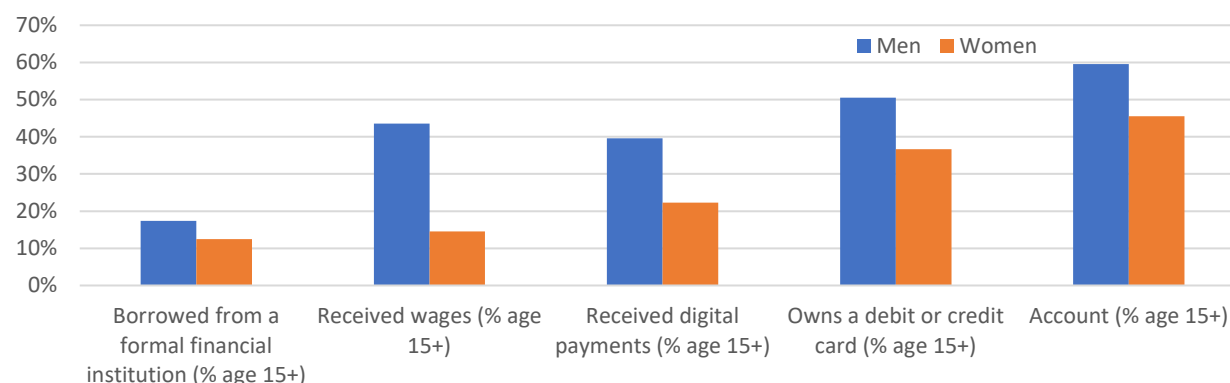
making it difficult for women to start and grow their businesses.<sup>44</sup> As a consequence, the region presents important gaps in financial inclusion between men and women (Figure 6). This, in turn, has major interactions with business development. In Jordan, self-employed women earned less than men in 2016. In Iraq, female-headed households earned significantly less from their activities in both agricultural and nonagricultural sectors. In Egypt while nonfarm household enterprises were frequently established, they also had a high dissolution rate without much change in size, affected by economic conditions. Women were notably less likely to initiate and maintain these enterprises compared to men.<sup>45</sup>

**Figure 5- Women, Business and the Law score average by region**



Source: World Bank Women, Business and the Law

**Figure 6- Financial inclusion indicators, gender gap - Middle East and North Africa**



Source: World Bank Findex data

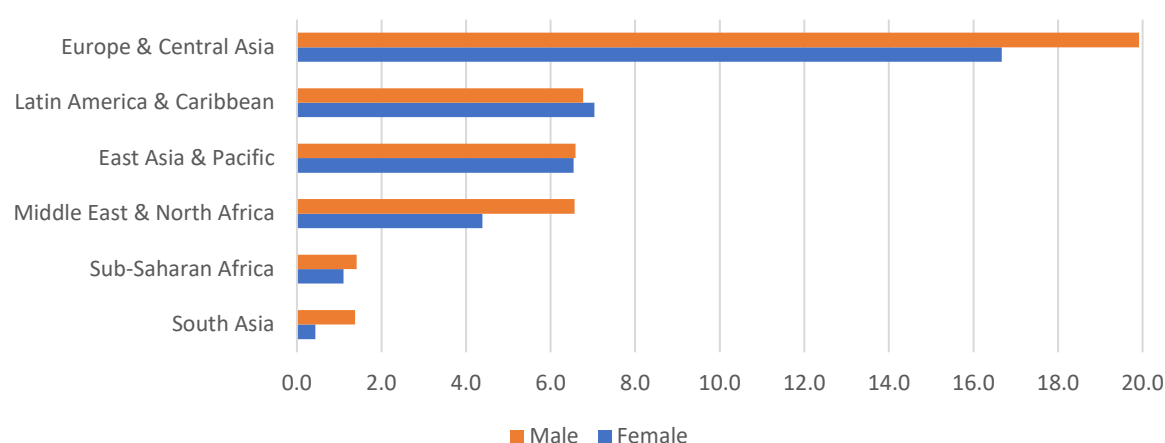
**Women's educational achievements do not always translate into labor market opportunities in the region, partially due to skill mismatches, and especially in STEM (Science, Technology, Engineering, and Mathematics) fields, where women are notably underrepresented.** Significant differences in wages and benefits exist between the public and private sectors in the region, leading to a strong preference among women for public sector jobs due to more favorable working conditions. However, the skills required in

<sup>44</sup> World Bank, 2024b.

<sup>45</sup> Islam et al., 2022.

the public sector often do not align with those in the private sector. With the public sector's stagnation or downsizing, skills acquired by women by or for public employment become less relevant, adversely affecting their job prospects in a changing private sector labor market.<sup>46</sup> Other education gender gaps persist. Despite higher educational levels among women in MENA, they still face lower literacy rates compared to men (73.1 percent vs. 85.8 percent),<sup>47</sup> and are less enrolled in technical and vocational education, with women's shares at 4.4 percent against men's 6.6 percent (Figure 7).<sup>48</sup> Notably, young women are over twice as likely to be not engaged in education, employment, or training compared to their male counterparts.<sup>49</sup> The education system's limited alignment with labor market demands exacerbates the skills gap, sidelining women from productive employment opportunities and leading to further occupational segregation.<sup>50</sup>

**Figure 7 - Proportion of 15–24-year-olds enrolled in vocational education, 2019**



Source: UNESCO Institute for Statistics (UIS), compiled by the World Bank.

**If obstacles exist for women to simply enter and stay in labor market, reaching leadership positions becomes even more challenging.** While the underrepresentation of women in leadership positions is a global issue, it is particularly pronounced in the MENA region. This disparity not only reflects the aforementioned gender gaps, but also has significant implications for women's economic advancement and the broader socio-economic development of the region. In 2022, MENA reported an average of only 13.8 percent of women holding ministerial-level positions, notably lower than the global average of 22.8 percent.<sup>51</sup> Furthermore, women's representation in national parliaments in 2022 stood at an average of 17.5 percent in the MENA region, compared to a 26.5 percent global average.<sup>52</sup> The gap extends into the corporate world as well, where only 6.5 percent of firms in MENA have women in top management roles, starkly contrasting with the 17.9 percent global average.<sup>53</sup> This disparity in leadership roles limits not only

<sup>46</sup> Assaad et al., 2020.

<sup>47</sup> United Nations Statistics. (n.d.).

<sup>48</sup> *Ibid*

<sup>49</sup> UNICEF Middle East and North Africa, 2021.

<sup>50</sup> *Ibid*

<sup>51</sup> World Bank Gender Data Portal, 2024a

<sup>52</sup> World Bank Gender Data Portal, 2024b

<sup>53</sup> World Bank, 2024c

the visibility and influence of women in key decision-making processes but also restricts the pool of role models for aspiring young women, perpetuating cycles of gender inequality and hampering efforts towards achieving gender parity in employment.

**While women across the MENA region encounter shared obstacles, at different degrees, the region in comprised by heterogeneous countries, each with their own unique set of challenges.** Albeit often perceived as a monolith in terms of gender dynamics and labor market challenges, in reality displays a complex landscape of labor market dynamics, characterized by a varied mix of economies with varying levels of female labor force participation, rights and representation. This heterogeneity underscores the differentiated challenges that women face across the region, shaped by the disparate economic and socio-cultural contexts of individual countries. These differences will inform urgency and priorities in which each obstacle has to be tackled. For instance, the degree in which women are represented in leadership positions, in what field of studies women are enrolled in, how well the law protects them or how dire the discrimination is, varies greatly within the region (See Figure 8, Figure 9, and Figure 10)

**Figure 8- Female share of graduates from STEM programs, tertiary (left), Proportion of women in ministerial level positions (right)**

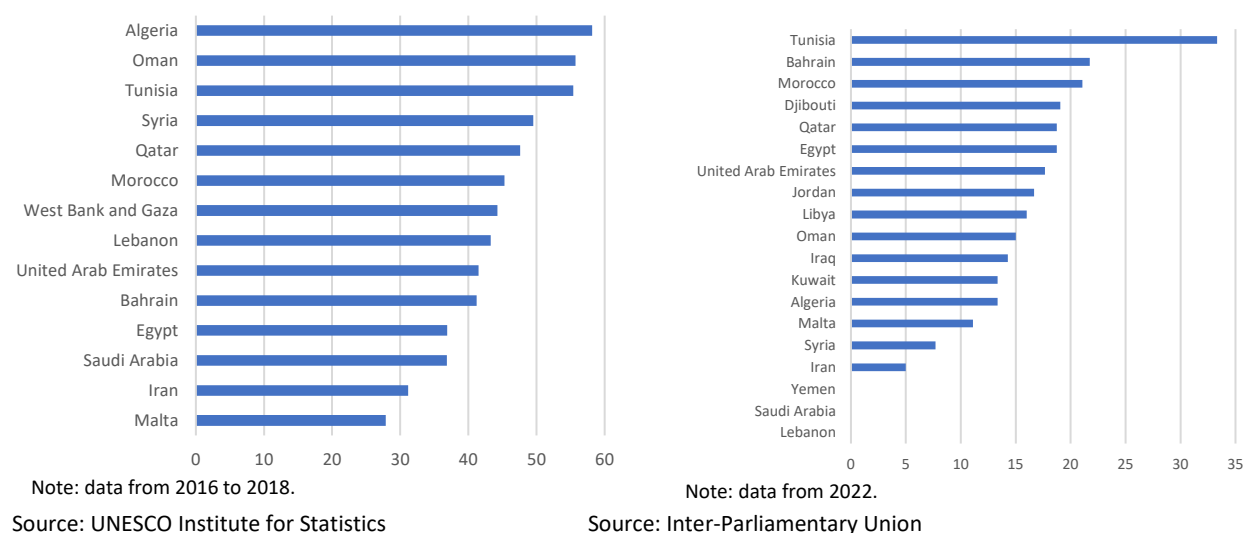
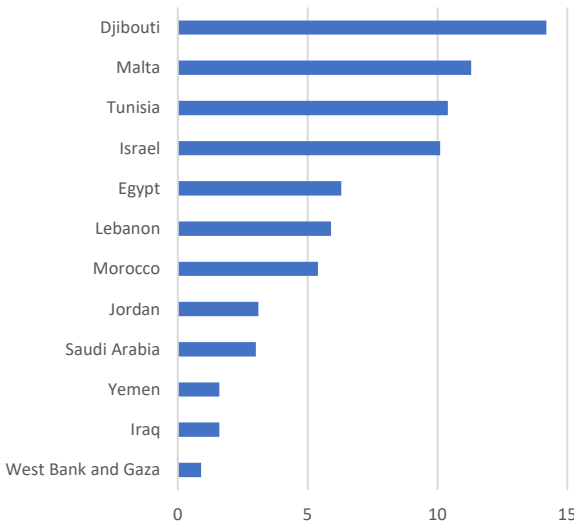
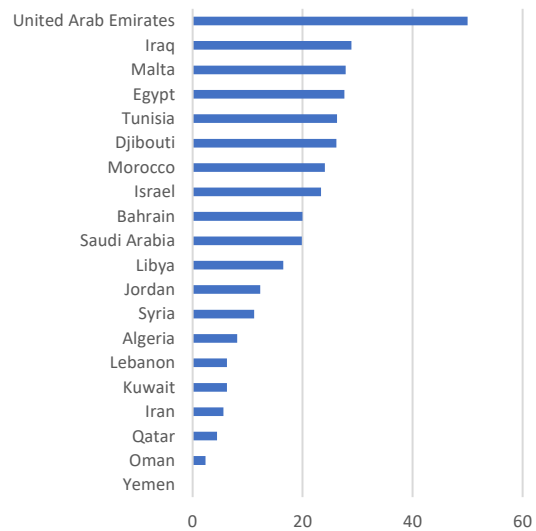


**Figure 9- Firms with female top manager (percentage of firms) (left), proportion of seats held by women in national parliaments (right)**



Note: data from 2013 to 2022.

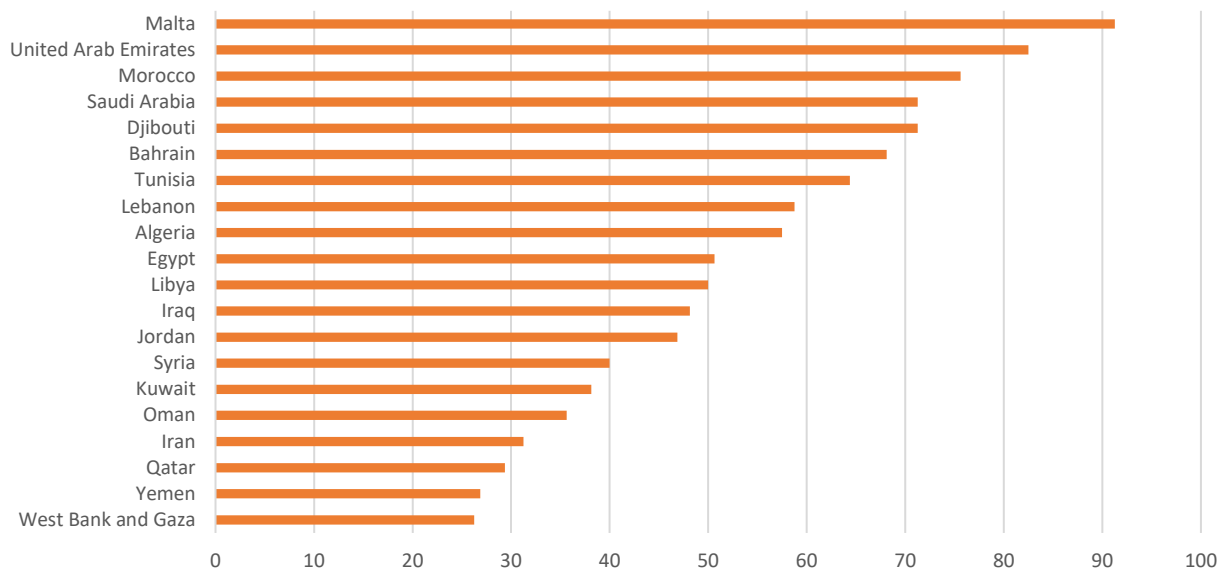
Source: World Bank, Enterprise Surveys.



Note: data from 2022.

Source: Inter-Parliamentary Union

**Figure 10– Women Business and the Law Index, MENA countries, 2023**



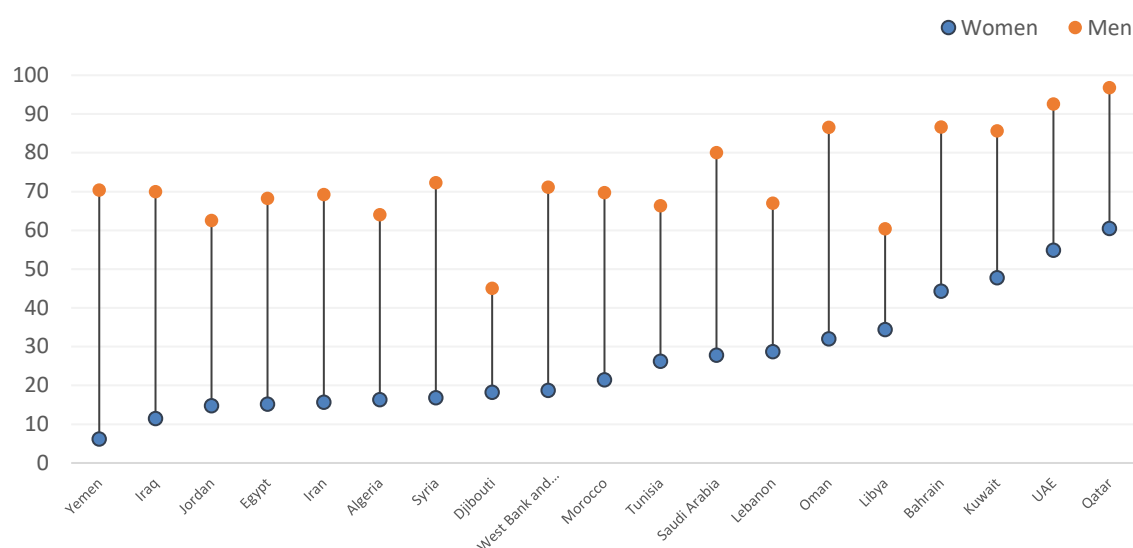
Source: World Bank Women, Business and the Law

**In lower income MENA countries, economic hurdles such as high unemployment, scant job creation, informality and instability disproportionately affect women, on top of other barriers that may exist.** These women often compete in a tough job market with limited opportunities, particularly within informal sectors lacking labor rights, further perpetuating gender disparities in employment. While the prevalence of informal employment varies across countries, in regions where it is widespread, women tend to be disproportionately affected compared to men. For example, informal work accounts for about 77 percent of all jobs in Morocco, 69 percent in Egypt, and 64 percent in the West Bank and Gaza, contrasting sharply

with places like Bahrain, where the rate is much lower, around 16 percent.<sup>54</sup> Differences in challenges can also be found in the spectrum of how rural and urban economies are, which challenges such as long working hours, transportation and security being less or more important.

**MENA countries facing economic and political instability have the lowest female labor force participation rates.** The lowest rate is observed in Yemen, where participation for women is extremely low at 6 percent (Figure 11). Iraq, Jordan, Egypt, Iran, Algeria, Syria, Djibouti and Palestine, which have also dealt with subsequent economic and/or political instability periods also figure among the countries where participation of women is below 20 percent. Conversely, all Gulf Cooperation Countries (GCC) countries are on the upper of the distribution. Important gaps between male and female LFP can be observed throughout the region, among rich and poorer countries alike, although with starker differences among the low-income ones.

**Figure 11 - Labor force participation rate (15+), 2022 -modeled ILO**

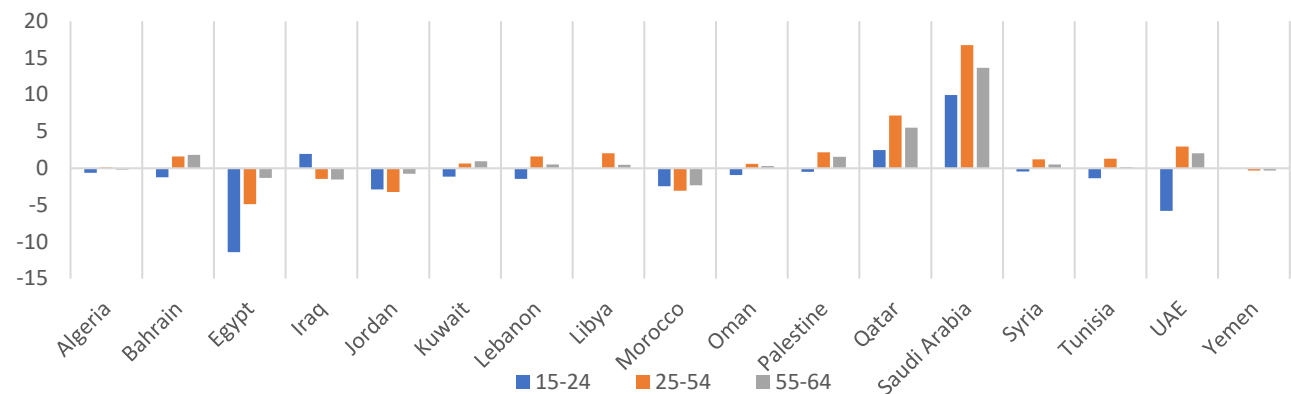


Source: ILOSTAT

**This diversity can be observed in the resulting changes in labor force participation of women across ages groups.** Certain countries like Qatar and Saudi Arabia have large positive changes across all groups, despite starting off at very different points. Similarly, we observe a loss across in the participation of youth, those between 15 and 24 years old, in countries with diverse socioeconomic backgrounds such as Egypt and the United Arab Emirates. A concerning drop that is observed among very different countries is the one experienced among women of core working age, as these are more likely to drop out of discouragement or family-related reasons. The changes in this group present once again a mixed bag, but losses and stagnation point to a need to particularly activate this group across the region (Figure 12).

<sup>54</sup> Islam et al., 2022.

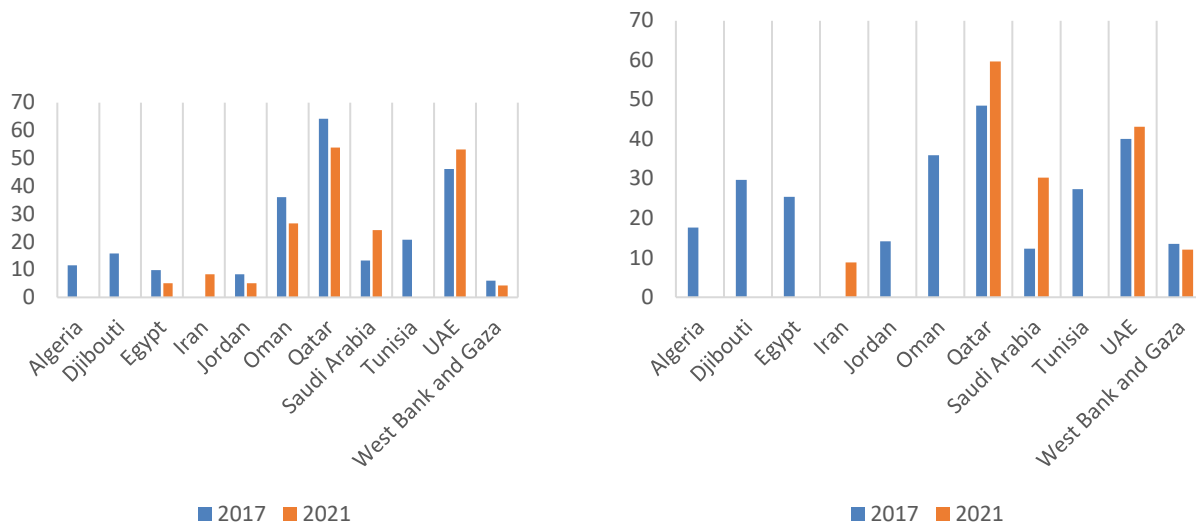
**Figure 12 - Percentage point changes in labor force participation by age (2022-2017)**



Source: ILOSTAT

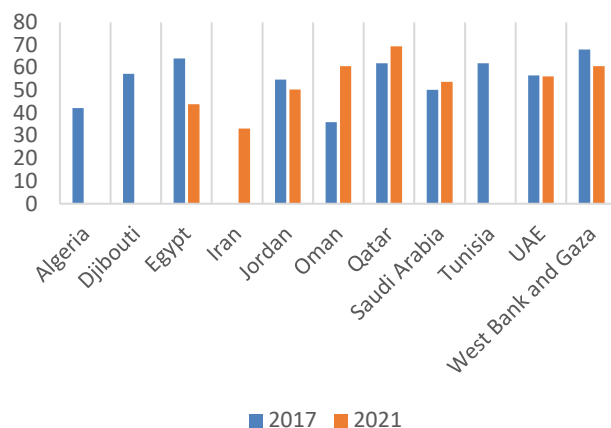
**The participation rate among educational groups in the MENA countries has also evolved unevenly.** In most countries, there has been a decline in the participation of women with basic education. However, Saudi Arabia and the United Arab Emirates stand out as exceptions, where in the latter two there has been a substantial increase in participation (Figure 13). The remaining countries have witnessed the largest increases in participation among women with advanced education (Figure 14). This is consistent with evidence that suggests that women with higher levels of education are more likely to enter the labor force. Overall, only one country has experienced an increase in participation across all age groups: Saudi Arabia. The rise in Saudi Arabia is particularly noteworthy. Between 2017 and 2021, the participation of women with basic and intermediate education has more than doubled.

**Figure 13 - Female labor force with basic education (left) and intermediate education (right)**



Source: ILOSTAT

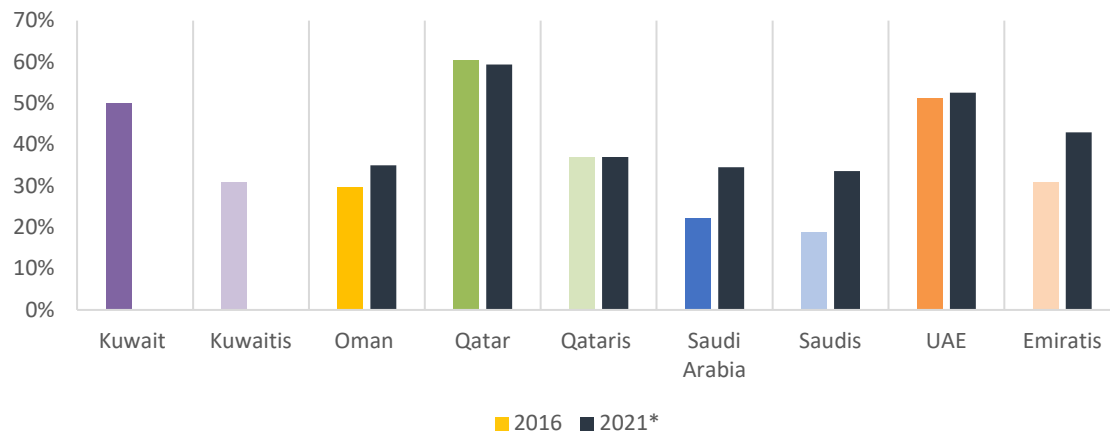
**Figure 14- Female labor force with advanced education**



Source: ILOSTAT

**However, it is important to note that in some GCC countries, which constitutes the majority of these high-income countries, foreign women play a significant role in driving up participation rates.** This substantial contrast in participation between native and foreign women raises concerns, as foreign women primarily migrate to these countries in search of employment or to join their employed spouses (Figure 15). The elevated participation levels driven by foreign women generates positive outcomes for the female population, nonetheless, it fails to reflect that native women continue to face a myriad of barriers to enter the labor market in these countries. Nonetheless, there are exceptions such as Saudi Arabia and United Arab Emirates, where women nationals are joining the labor market and aiming for higher integration levels, this is reflected in the higher engagement in the labor market and in the governmental efforts to achieve this goal.

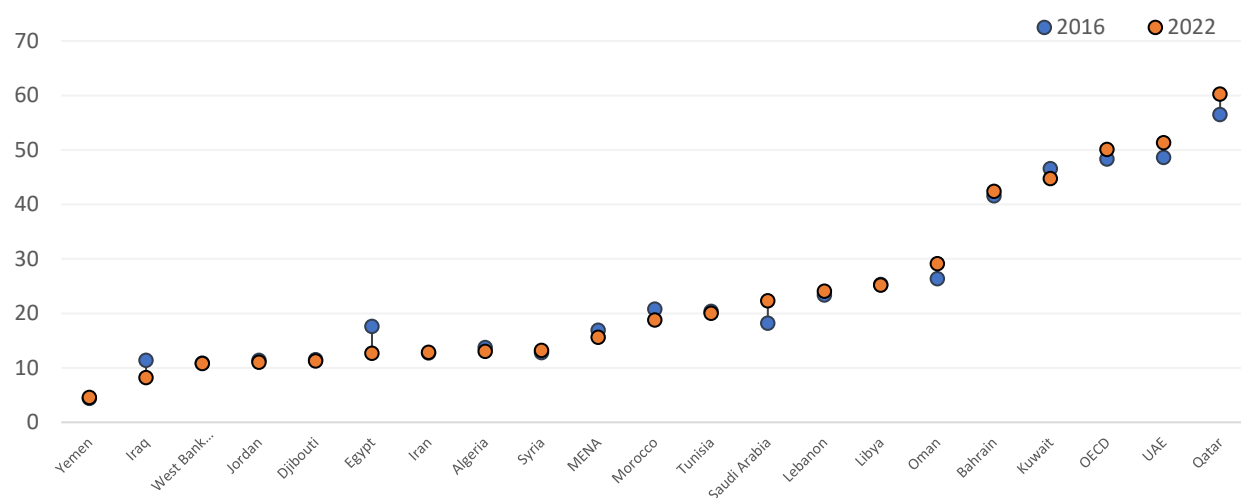
**Figure 15- Female labor force participation rates in the GCC (overall and for citizens only, 2016 and approximately 2021)**



Source: World Development Indicators, Qatar Planning and Statistics Authority, GASTAT, UAESTat, Kuwait Central Statistical Bureau.

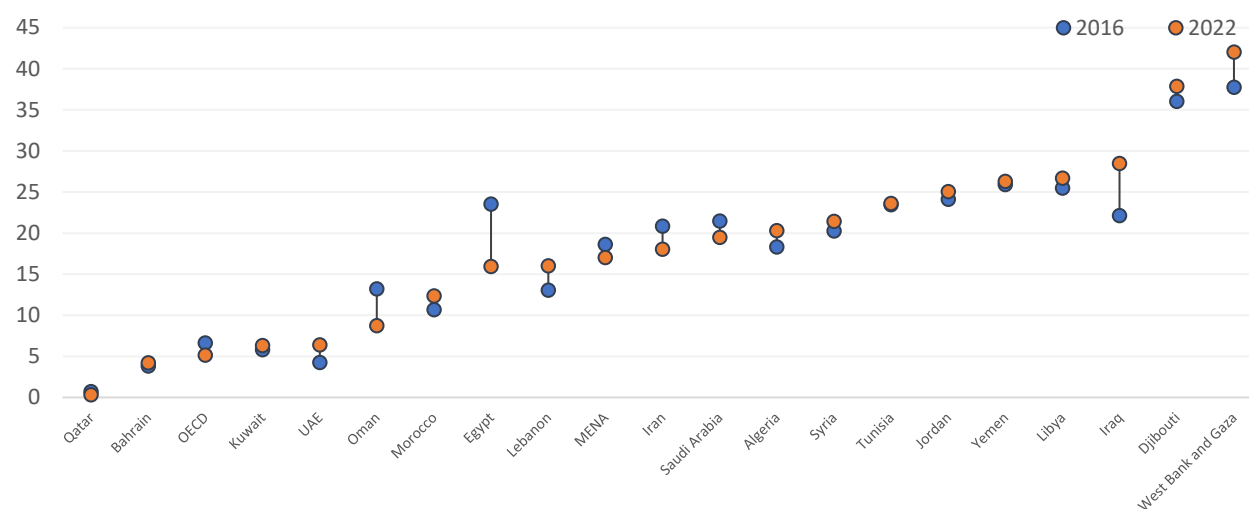
**Lastly, the question for countries which have seen an increase in women's participation remains: Are women finding employment?** The answer to this question varies significantly across countries. Only a few that have seen an increase in women's participation have also experienced highly positive outcomes, including a decrease in unemployment and an increase in the employment-to-population ratios. These countries include Oman, Qatar, and Saudi Arabia, all of which are classified as high-income nations (Figure 16 and Figure 17). Interestingly, these positive outcomes are particularly prominent in the GCC region, where significant reforms have been implemented in recent years. On the other hand, some countries have experienced mixed outcomes. For example, Bahrain, the UAE, and Lebanon have seen an increase in women's labor force participation and an increase in the employment-to-population ratios. However, they have also faced an increase in unemployment rates. Despite this, the growing confidence among women in joining the labor force represents a positive trend towards gender equality. Nevertheless, the existence of obstacles hindering some women from finding employment underscores the persistence of barriers that need to be addressed.

**Figure 16 - Employment to population ratios for women – ILO estimate**



Source: World Development Indicators

**Figure 17 - Unemployment rates for women – ILO estimate**



Source: World Development Indicators

**In the MENA region, women continue to encounter substantial economic engagement barriers, arguably more significant than those in other regions, but the notable differences across individual countries are crucial for informed policy formulation.** Despite educational gains, FLFP remains the lowest globally at 19 percent in 2023, underscoring a vast gender gap in labor force engagement. Various obstacles, including social norms, legal constraints, employer discrimination, and the substantial burden of unpaid care work, disproportionately challenge women's entry and persistence in the labor force. The profound disparities within the region, from leadership representation to legal protections and access to credit, not only demonstrates the significant impact of these challenges on women's economic opportunities but also showcases the diversity of these challenges across different countries within the region, influenced by economic, socio-cultural, and legal contexts. This variation underscores the necessity for nuanced and targeted policy interventions to address the specific barriers women face in

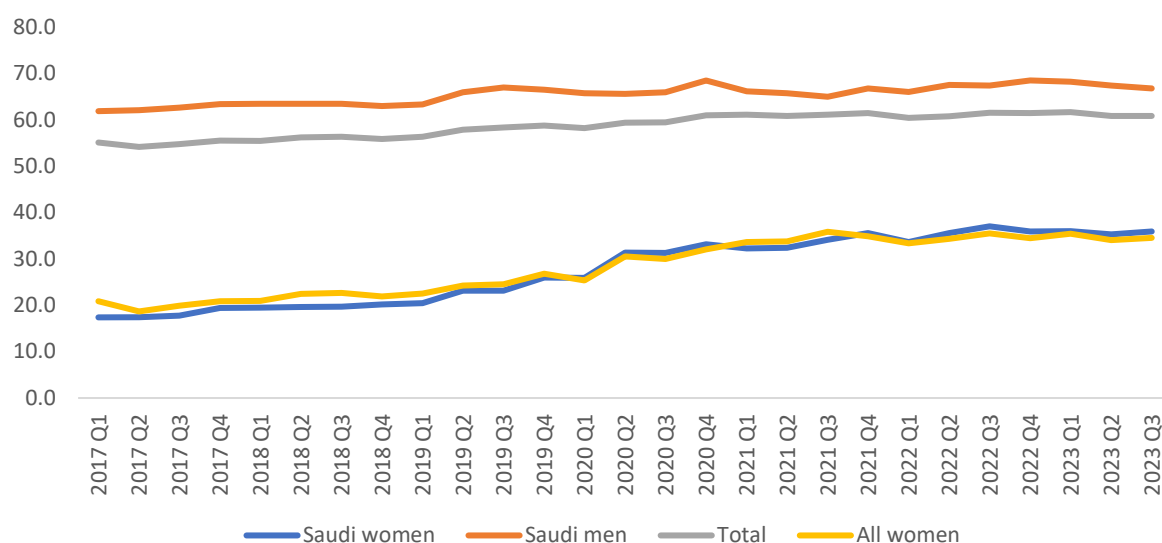
each country, aiming to prioritize and tackle challenges according to their urgency and impact on women's economic participation and advancement.

## 4. The Experience of Saudi Arabia

### 4.1 An unprecedented scale and speed of change

**Saudi Arabia has experienced one of the most successful increases in female labor force participation in recent history.** The increasing trend has not been exclusive to Saudi Arabia across the region; however, the extent and speed of this surge seems to remain unmatched. Between 2017 and 2023, a six-year span, Saudi Arabia's participation for women has increased by almost 14 percentage points (Figure 18). Most of this rise can be explained by Saudi women entering the labor market between 2017 and 2021. In fact, for this group, there was an increase of 104 percent within this same period.<sup>55</sup> Other countries in the region have experienced large increases in the past of around 30 percent, such as Oman and Bahrain, but none has experienced such a rise and within such a limited time period.<sup>56</sup> There is a myriad of explanations behind this surge, one of them being that Saudi Arabia, as many other countries in the region was lagging behind the participation of women. Nonetheless, there is much more to be considered and presented in the upcoming sections.

**Figure 18 – Labor force participation rate (2016 to 2023)**



Source: GASTAT

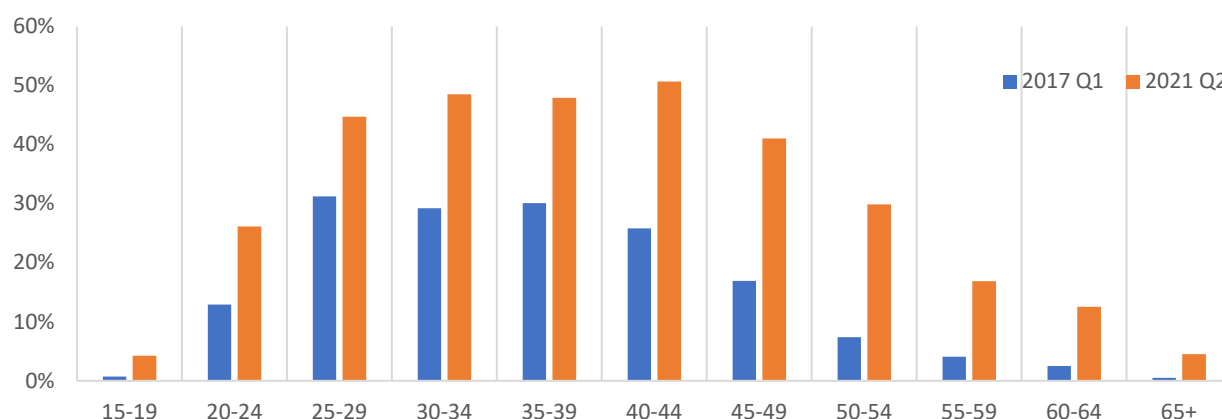
**More interestingly is the fact that this surge in female labor force participation has been widespread and endured through economic changes.** This increase is notable across all age groups of women, indicating a broad shift in societal norms and job opportunities. More and more Saudi women across the country have been searching and finding jobs. A notable group is that of older women (55 years old or more), who have experienced the most significant relative increases (Figure 19). This rise is surprising as

<sup>55</sup> GASTAT, 2024

<sup>56</sup> World Bank, 2024a

women from this age are merely a couple years away from entering their pension years. Such an increase poses the question of what is attracting women, even those of older ages, to enter the labor market. Furthermore, it emphasizes that whichever factors are influencing participation in the country are broad and not confined to specific demographics.

**Figure 19 – Labor Force Participation Rates of Saudi women by age groups<sup>57</sup>**



Source: GASTAT

**In terms of educational backgrounds, we observe quite a diverse rise in participation.** The largest participation gains have been observed among those with previously low levels of participation, namely those with secondary or below, and who constitute the minority of the labor force (Figure 20), as those with less than secondary education only comprise 12 percent of the labor force stock.<sup>58</sup> The participation among those with higher education levels was more moderate, but still positive, consistent with the findings of Kaddah (2025). Those with Doctorate degrees were the only group to experience small drop in participation, but since their participation was almost full, fluctuations are expected. The trend among educational groups supports the findings of a large and inclusive surge in participation. Low-educated Saudi women, who were traditionally out the labor force, seem to be increasingly willing to enter the labor market and accept low-wage jobs. Remarkably, this trend persisted even during the pandemic, contrasting with many OECD nations where participation rates declined.

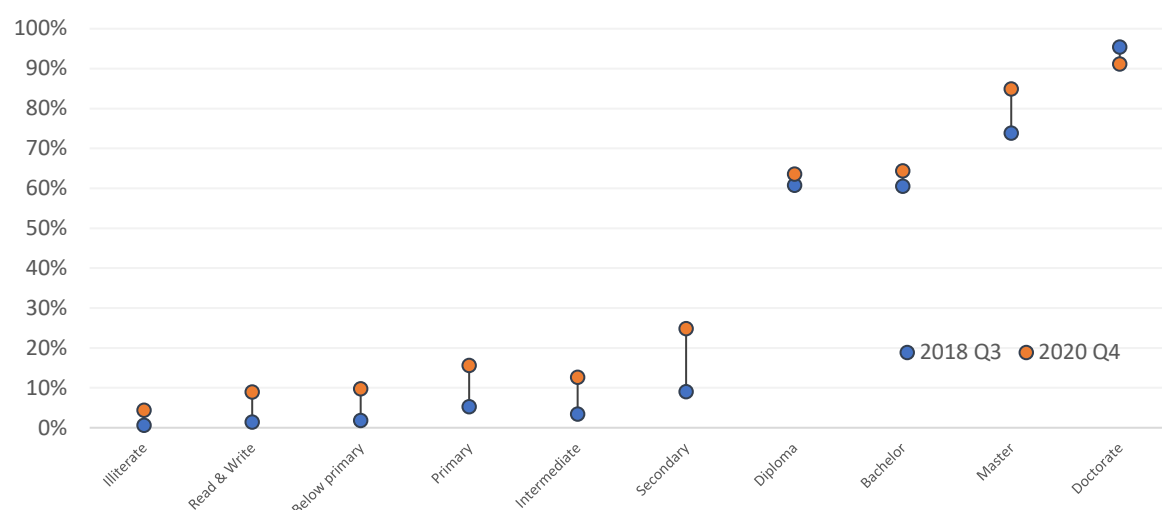
**Notably, Saudi women who entered the labor force found employment.** While increases in participation typically correlate with rises in both employment and unemployment, in Saudi Arabia the expansion in participation has led to a greater proportion of women becoming employed rather than unemployed (Figure 21). A decomposition analysis by Kaddah (2025) further reinforces this pattern: employment gains among Saudi women are driven overwhelmingly by the participation effect, which accounts for around 70 percent of total growth, indicating that the primary driver has been the entry of new female workers into the labor market. The employment effect—women already in the labor force securing jobs—explains only about a quarter of the increase, while the demographic effect remains minimal. This aligns with the

<sup>57</sup> Any changes in the timespans of analysis are explained by changes in the classification methodologies by GASTAT. Haim to focus on the changes during the expansion phase when available.

<sup>58</sup> GASTAT, 2024

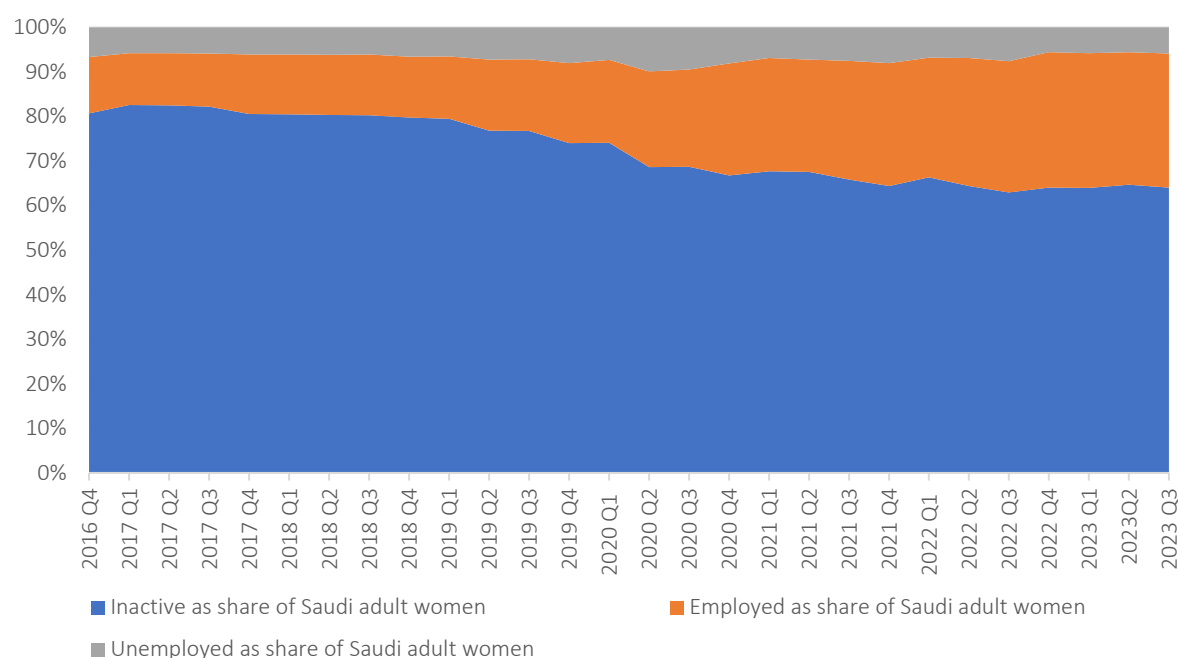
observed dynamics in Saudi Arabia's private sector, which, despite historically being less inclusive of women, has been at the forefront of absorbing these new entrants (Figure 22).

**Figure 20 – Labor Force Participation Rates of Saudi women by educational level**



Source: GASTAT

**Figure 21 – Structure of Adult Saudi Women Population by Labor Force Status (2016 to 2023)**

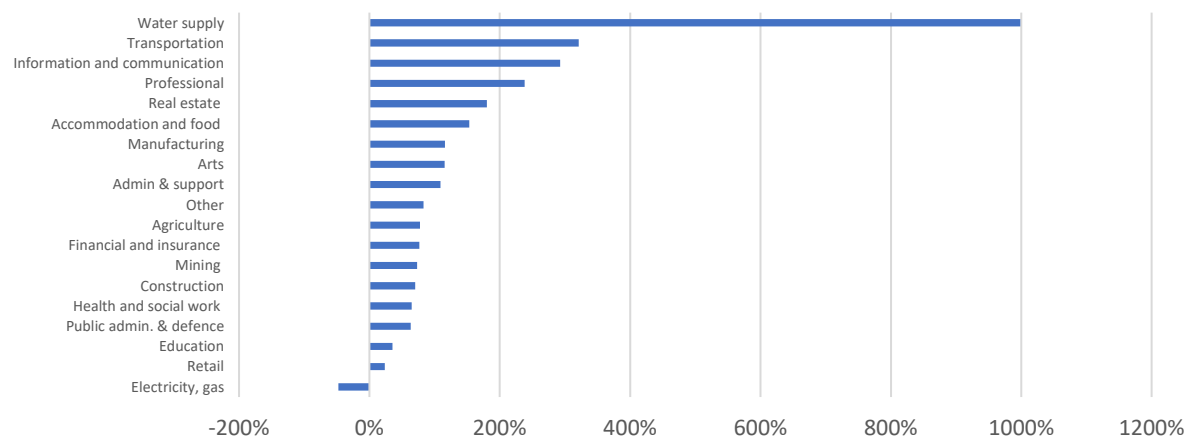


Source: GASTAT

**Moreover, Saudi women have started diversifying their career choices, venturing into the private sector, and into fields once male-dominated, such as transportation and information and communication technologies** A notable trend is the large growth in occupations that had a scant presence of women in 2019 (Figure 23), suggesting a broadening of opportunities and a break from conventional

occupations over the four-year period from 2019 to 2023. In fact, in 2016, over 65% of Saudi women were employed in sectors like education and health, but by 2022, this figure had fallen to around 37%.<sup>59</sup> This however does not imply that women are not continuing to enter occupations that they traditionally occupied such as health and education, just that they have broadened their employment into other sectors. Moreover, we also observe women continuing to enter occupations with high educational requirements, such as professional occupations, which experienced the fourth largest growth within this period (Figure 22).

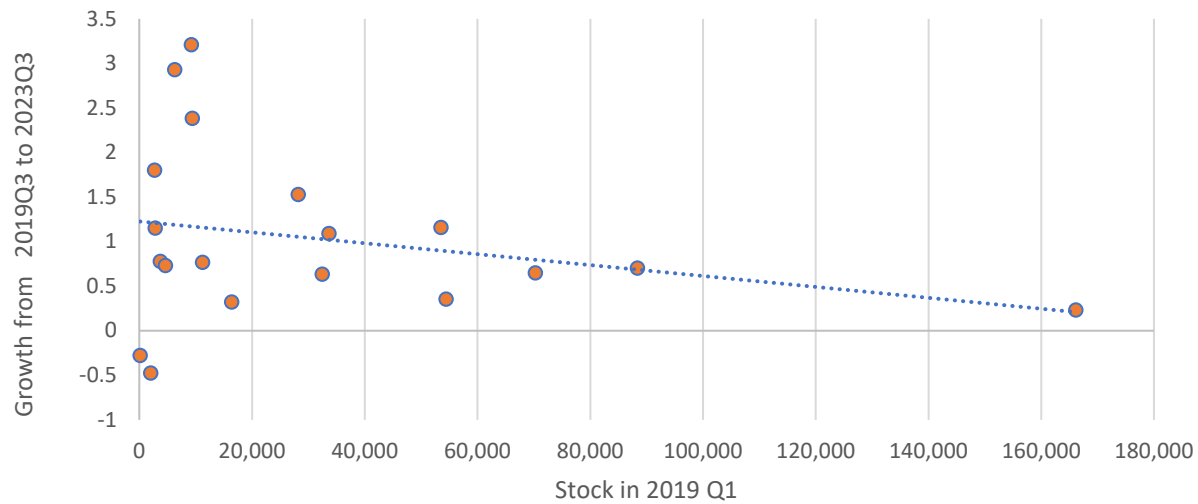
**Figure 22 – Change in employed Saudi women in the private sector, 2019 Q3 to 2023 Q3**



Source: GASTAT

<sup>59</sup> Kaddah, 2025

**Figure 23 – Saudi women employed across economic activities in 2019 Q1 and occupational growth between 2019 Q3 and 2023 Q3**



Source: GASTAT

#### 4.2 Determining factors

**The “Saudi Vision 2030,” Saudi Arabia’s national reform policy launched in April 2016, marked a pivotal moment for Saudi women’s integration into the labor force.** This national reform policy not only aimed to diversify the Kingdom’s economy beyond its traditional oil and gas sectors but also recognized the untapped potential of its citizens, particularly women, as a vital resource for sustainable development. However, the Vision emphasized that the country’s true resources was the potential of its people and that the economy under Vision 2030 would look to “provide opportunities for everyone — men and women, young and old.”<sup>60</sup> The Vision explicitly acknowledged Saudi women as a “great asset” to the country and dedicated a portion of its agenda to enhancing their participation in the labor market.

**Since the launch of the Vision, Saudi Arabia has witnessed an extraordinary surge in the participation of women in the labor force.** This remarkable transformation represents a historic shift for the country, occurring within an exceptionally brief timeframe. It is essential to recognize that Saudi Arabia embarked on this journey from a historically low starting point in terms of female labor force participation, ranking among the world’s lowest, while confronting substantial policy barriers for women’s employment. Hence, the rapidity of change is not surprising, especially as these constraints were progressively dismantled. What’s more, Saudi women swiftly secured employment opportunities.

**Rather than a single cause, this report examines several changes that took place simultaneously.** These include institutional reforms creating a national gender agenda, removal of legal barriers, implementation of new policies which created a supportive environment for the working woman, combined with societal acceptance and external factors like the Coronavirus (COVID) pandemic, collectively contributed to the

<sup>60</sup> Kingdom of Saudi Arabia. (n.d.).

substantial increase in women's participation that was primarily seen within the private sector. It is important to note, however, that these are not the only drivers of the rise in participation.

**Other authors highlight additional sources of this increase, such as the drop in oil prices after 2014.**

Empirically, rising oil prices can reduce FLFP: moving from one standard deviation below to one above the mean oil price shock lowers predicted FLFP by roughly five percentage points, with the effect strongest in Muslim-majority MENA countries. This negative effect strengthens as prices rise because high-oil-price periods generate higher transfers and subsidies that raise household income, reducing the financial need for women to work, and channel investment into oil and non-tradable sectors that remain dominated by male workers. Conversely, when oil prices fall, the relationship reverses and increases FLFP: fiscal pressure triggers subsidy reforms that push households to seek additional wage earners (often women), while labor force nationalization and new taxes and fees on foreign workers shift private-sector demand toward women. Saudi Arabia exemplifies these dynamics after the 2014 oil price drop: long-standing reliance on oil revenues, fiscal strain following the 2014 oil price collapse, and rising youth unemployment pushed women's employment to the forefront of the national agenda—while government initiatives played a central role in enabling this transition, the shifts in oil prices might have also played a role.<sup>61</sup>

#### 4.2.1 Institutional Reform

**One of the Vision's targets was to increase women's participation in the labor force from 22 percent to 30 percent.**<sup>62</sup> Government entities throughout the Kingdom were mandated with ensuring that both nation-wide policies, as well as smaller grass-root initiatives were being pushed through their respective agencies towards this goal.<sup>63</sup> One of the ways in which this was done was through the establishment of various Key Performance Indicators (KPIs) that government agencies would become responsible for achieving (Table 1). The subsequently launched National Transformation Program, the first Vision 2030 Vision Realization Program launched in 2016, set further KPIs such as the ratio of women in managerial positions.<sup>64</sup> Vision 2030 also placed importance on Saudi Arabia's international reputation, as reflected in global rankings. Consequently, the National Competitive Center, established in 2019, was charged with monitoring and enhancing the country's global competitiveness, including tracking the World Bank Group's Women, Business, and the Law Report. Other agencies were also tasked on improving Saudi Arabia's standings in gender-related indices, such as the World Economic Forum's Global Gender Gap Report and the United Nations Development Program's (UNDP) Gender Inequality Index, by proposing economic reforms that would positively influence these rankings.<sup>65</sup>

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<sup>61</sup> Mohtadi et al. 2025

<sup>62</sup> This goal was further increased to 40% in 2024, after the 30% goal was achieved

<sup>63</sup> Saudi Vision 2030, 2024; this target has since been raised to 40% (Asharq Al Awsat, 2023, Dec 15)

<sup>64</sup> For more information on the National Transformation Program : <https://www.vision2030.gov.sa/media/kljd5wha/2021-2025-human-capability-development-program-delivery-plan-en.pdf>.

<sup>65</sup> For more information on the National Transformation Program : <https://www.vision2030.gov.sa/media/kljd5wha/2021-2025-human-capability-development-program-delivery-plan-en.pdf>.

**Table 1: Vision 2030 Targets for Women's Participation and Responsible Entities**

| Indicator                                                                           | Entity Responsible for Execution                      | Vision Target |
|-------------------------------------------------------------------------------------|-------------------------------------------------------|---------------|
| Female Labor Force Participation Rate                                               | Vision 2030 Mandate                                   | 30 percent    |
| Woman's Share in the Labor Market (from the overall Saudi labor force)              | Ministry of Human Resources and Social Development    | 28 percent    |
| Number of available job opportunities in the private sector for female citizens     | Ministry of Human Resources and Social Development    | 1,200,000     |
| Percentage of women in the civil service                                            | Saudi Ministry of Civil Service <sup>66</sup>         | 42 percent    |
| Percentage of women in senior positions                                             | Saudi Ministry of Civil Service                       | 5 percent     |
| Women's Participation in Information and Communication Technology (ICT) Professions | Ministry of Communications and Information Technology | 29.5 percent  |

Source: <https://journalarticle.ukm.my/19211/1/Mai-IJIT-Vol-21-June-2021-226.pdf>

In addition to KPIs and targets, government entities were assigned different initiatives aimed at enabling women in the labor market. Most notably in setting out largescale initiatives for women was the National Transformation Program (NTP) (Table 2). While the Ministry of Human Resources and Social Development (MHRSD) took the lead on labor market enablement for women, other ministries, including the Ministry of Education,<sup>67</sup> Ministry of Commerce,<sup>68</sup> Ministry of Communications and Information Technology,<sup>69</sup> the Digital Government Authority,<sup>70</sup> and the Ministry of Finance,<sup>71</sup> among others. As a testament prioritization of developing these policies and initiatives, the Saudi Ministry of Finance launched in 2023 a “Women empowerment initiative within the framework of the Saudi Annual Budget,” to ensure that budget allocations supported programs that empower women and provided them with the necessary resources.<sup>72</sup>

**Table 2: List of Key Initiatives set by the National Transformation Program Related to Gender**

| Initiative                                              | Initiative Description                                                                                                                                                                                                                                                                                                        | Leading Entity                  |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|
| Enhance Notary Protections for Women and Families       | The Initiative aims to improve notary services provided to individuals. This will ensure accessibility and timeliness of notary services and maintain the rights of women and children. It will also increase awareness regarding women and children rights by operational procedures based on the approved notarization law. | Ministry of Justice             |
| Developing training programs targeting unemployed women | This initiative is aimed at developing training programs targeting unemployed women. The program consists of on-the-job training (by the employer) in parallel with a                                                                                                                                                         | Ministry of Human Resources and |

<sup>66</sup> As of 2020, the Saudi Ministry of Civil Service has been merged with the Ministry of Human Resource and Social Development. Consequently, the responsibility for achieving the KPI has been transferred to the latter ministry (HRSD, 2024)

<sup>67</sup> Ministry of Education, n.d.

<sup>68</sup> Ministry of Commerce, 2022

<sup>69</sup> Ministry of Communications and Information Technology, 2024

<sup>70</sup> Digital Government Authority, 2023

<sup>71</sup> Ministry of Finance, 2022

<sup>72</sup> Ministry of Finance, 2023

|                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                               |                                                    |
|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|
|                                                                                    | training program (technical and personal skills) by specialized training authorities. Upon training completion, the female trainee obtains an approved certificate from the training program owner. Furthermore, participating companies will be supported in various ways.                                                                                                                   | Social Development                                 |
| Training and Leadership Orientation for Women Cadres                               | This initiative aims at developing training and orientation programs to improve working women's skills, preparing them for leadership positions, and increasing women employment rate in leadership positions (senior & middle management levels).                                                                                                                                            | Ministry of Human Resources and Social Development |
| Empower Women in Civil Service and Promote their Participation in Leadership Roles | This initiative aims to increase women participation ratio in the labor market at all the levels of government positions. This will be done by promoting women to senior leadership positions in government authorities within the civil service, investing in women's capabilities, expanding work options for women, and increase women's participation in order to achieve gender balance. | Ministry of Human Resources and Social Development |
| Provide Childcare Services for Working Women                                       | This initiative aims to empower Saudi working women to join the labor market while being reassured regarding the care provided to their children during their work period. Saudi working women will be able to enroll their children in any childcare service centers licensed by "Qurrah" e-system.                                                                                          | Ministry of Human Resources and Social Development |
| Support and Facilitate Women Transportation                                        | This initiative aims to support Saudi women working in the private sector by providing transportation solutions to and from their workplace. The initiative will develop a program to provide the transportation service and publish reports highlighting the number of beneficiaries of the program.                                                                                         | Ministry of Human Resources and Social Development |

Source: Taken from the "National Transformation Program Delivery Plan: 2021-2025"<sup>73</sup>

**These reforms have been accompanied by a concerted push to promote female economic participation and increase women's visibility in the public sphere.** This has been supported by the fact that since the introduction of reforms there has been an increased emphasis on promoting female participation in the economy and elevating the presence of women in the public sphere. This message has been consistently conveyed through various channels, including the Saudi media, is exemplified by the appointment of Saudi women to government positions. In February 2017, Saudi Arabia appointed the first woman to chair the Saudi Arabian stock exchange, the largest stock market in the Middle East.<sup>74</sup>

**Since its launch, Vision 2030 has served as the cornerstone of Saudi policymaking.** Naturally, its heavy emphasis of women's enablement would lead to an institutional overhaul that prioritized this mission across all government entities. Establishing KPIs and delegating strategic initiatives across the government builds a monitored and concentrated effort to achieve tangible changes in the labor market for women. While it may be difficult to claim which policy developments have made the largest impact on the increase

<sup>73</sup> Kingdom of Saudi Arabia, 2021

<sup>74</sup> Arab News, 2021

in female labor force participation, the collective effort in formulating and prioritizing these policies and initiatives throughout the government is sure to play a part.

#### 4.2.2 Legal Reforms

**Legal reforms have played a crucial role in increasing FLFP in Saudi Arabia.** Prior to the implementation of Saudi Vision 2030, women faced numerous legal barriers that restricted their entry into the labor force and limited their occupational choices, contributing to a segregated labor market. However, dismantling these legal barriers allowed the labor market to become more accessible to larger segments of women, while offering a broader spectrum of opportunities across various professions.

**From the year 2017 Saudi Arabia began passing legal reforms meant to for women, many which would pave the way towards making it easier for women to work.** Among the first reforms was granting women access to government services without need for approval for a male relative. In particular, this would ease access for women to jobs and higher education.<sup>75</sup> Additionally, that year saw a historic decree allowing women to drive, overturning decades of being banned. Prior to this decree (which came into effect in 2018), Saudi employers were obligated to provide transportation for their female workers—one of the many requirements that previously discouraged employers from hiring women. In 2018, Saudi Arabia put into effect an anti-harassment law making it a criminal offence. Importantly, this law stipulates that both government and private entities must take proactive measures to prevent and address harassment. These measures include implementing anti-harassment policies, establishing confidential and safeguarded complaint mechanisms, taking disciplinary action against perpetrators, and raising awareness about harassment among their employees.<sup>76</sup> That same year, other reforms included women becoming eligible to work in previously prohibited positions in the military, passport controls, and the public prosecution office,<sup>77</sup> and being allowed to open a business without the consent of a male guardian.<sup>78</sup> In late 2018, the Ministry of Human Resources and Social Development issued a unified guide regulating women's work environments to create a standardized and attractive working environment for women while setting forth parameters on their working hours and professions. Additionally, it mandated that women be provided equal opportunities to men in jobs, including during the recruitment stage, and prohibited wage discrimination, ensuring fair compensation for work of equal value along with corresponding benefits. The law also required that workplaces be physically equipped to accommodate women in their space, as many workplaces were had not previously employ women.<sup>79</sup>

**In 2019, Saudi Arabia adopted critical reforms in its labor law to aimed at empowering women, particularly in participating in the labor market.** A significant testament to these changes was the amendment of the labor law to redefine a laborer as “any person, *male or female*.” The new labor law underscored the right of all individuals to work, eliminating any remaining ambiguity regarding women's need for permission to enter employment. The revisions to the labor law placed strong emphasis on eradicating gender discrimination in employment practices, including from job advertising and the hiring

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<sup>75</sup> For more information on the legislation: <https://english.alarabiya.net/News/gulf/2017/05/04/Saudi-women-no-longer-need-male-guardian-consents-to-receive-services->

<sup>76</sup> For more information on the legislation: <https://edition.cnn.com/2017/09/27/middleeast/saudi-arabia-women-drive/index.html>

<sup>77</sup> Arab News PK, 2020, Al Arabiya News, 2019

<sup>78</sup> Al Arabiya News, 2018

<sup>79</sup> Ministerial Resolution No. (39860)

process to the workplace itself. These reforms included aligning the retirement age for women with that of men at 60 years old, introducing pension care credits for maternity leave, and prohibiting the termination of women during pregnancy or maternity leave.<sup>80</sup>

**During this period of reform between 2018 and 2021, opportunities for female employment were gradually expanded across all industries, including traditionally male-dominated fields such as notary, judiciary, airports, and the military, even during night shifts.**<sup>81</sup> Other reforms included adjusting Saudization quotas to incentivize greater female employment, lifting restriction on employment sectors previously considered unsafe, eliminating ban on women's night work, and expanding educational spheres for Saudi women. During this time, Saudi Arabia expanded its civil and labor laws to include women's rights and address issues of travel, family, government services, and finance.<sup>82</sup>

**The transformative impact of the legal reforms was evident in various global indices, with Saudi Arabia recognized as a top reformer and improver in the 2020 Women, Business and the Law Report by the World Bank.** In this report, which evaluates how a country's legal framework impacts women, Saudi Arabia achieved a score of 70.6 out of 100—a substantial leap from its 2019 score of 25.63. The 2020 WBL report positioned Saudi Arabia first among GCC Countries and second in the Arab world. Saudi Arabia improved in six out of eighteen indicators, including mobility, workplace, marriage, parenthood, entrepreneurship, and pension. The changes in the legal settings reflected in other major global indices, for example in the Gender Gap Report, by the World Economic Forum and which measures the gap between KPIs for men and women. For instance, the Economic Participation and Opportunity score for Saudi Arabia went from 0.387 in 2015 to 0.524 in 2022.

**Maternity support has also been enhanced.** Women were now entitled to 10 weeks of fully paid maternity leave, where previously there were conditionalities to the full payment, with the possibility of a one-month extension for mothers of sick babies or babies in need of special care, where such extension was not previously possible.<sup>83</sup> Although still not at the 14-week ILO standard, improved maternity leave provision aligns with evidence that shows a strong positive correlation between longer fully paid maternity leave and increased female labor force participation.<sup>84</sup>

**These legal reforms implemented between 2018 and 2021 in Saudi Arabia not only expanded opportunities for female employment across all industries but also effectively removed numerous barriers that previously discouraged employers from hiring women.** The transformation of the legal landscape surrounding women not only removed barriers that previously discouraged employers from hiring women but have also fostered a more inclusive and equitable work environment conducive to female labor force participation in Saudi Arabia.

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<sup>80</sup> Full labor law can be found at: <https://laws.boe.gov.sa/BoeLaws/Laws/LawDetails/08381293-6388-48e2-8ad2-a9a700f2aa94/1>

<sup>81</sup> Saudi Gazette, 2020

<sup>82</sup> For a full table of laws on reforms related to women during this period: <https://www.saudiembassy.net/sites/default/files/Factsheet%20on%20Progress%20for%20Women%20in%20Saudi%20Arabia.pdf>

<sup>83</sup> Ministry of Human Resources and Social Development, 2024.

<sup>84</sup> Low and Sánchez-Marcos, 2015; Del Rey, Kyriacou, and Silva 2021; and Thévenon and Solaz, 2013

#### 4.2.3 Enabling policies for working women

**Section 4.2.1 highlighted the initiatives to support the enablement of women in the labor market emerged from various government entities within the Kingdom while this section looks to expand on these initiatives and their role in building an enabling environment for working women.** In parallel to the legal reforms, across Saudi Arabia various initiatives and policies were put in place to help prepare women for and support them in the labor market. These encompassed active labor market programs, improvements to care provision, providing avenues for flexible employment, and expansion of education and training. Certain policies, such as the ones focused on childcare were intentionally designed to accelerate the growth of female participation in the labor force, while others, including broader enhancements within the care economy, availability of flexible work arrangements, and increased access to service jobs, indirectly contributed towards creating an enabling environment for women in the labor market.

**One notable facet of this policy evolution revolved around active labor market programs.** The Human Resources Development Fund (HRDF) under the Ministry of Human Resources and Social Development works on providing program that train and qualify Saudis to join the private sector. HRDF offers a variety of employment-support programs for both men and women. One of the services offered by HRDF is “Taqat,” a comprehensive job-matching platform which as of 2021, has helped connect over 132,512 Saudis to employment, out of which, 72,630 were women. Furthermore, as of 2021, HRDF has 44 employment centers throughout the country, and in that year alone helped employ 73,170 Saudis, 37,183 of which were women. This trend of women leading not only uptake of HRDF programs but employment through them can be seen throughout most of the active labor market programs launched by HRDF, such as for unemployment benefits, teleworking training and employment, teacher wage subsidy employment program, and Small and Middle Enterprises (SME) support. Other Active Labor Market Programs (ALMPs) launched by HRDF include an employment subsidy program which ran from 2019 to 2021 and provided subsidies for employed persons within target groups, including females, and also provided entitlements for the employer who recruits females as an incentive. Between 2018 and 2021, the program provided subsidies to over 115,491 women.<sup>85</sup> HRDF also notably launched its “Wusool” program, a transportation support providing transportation solutions for female Saudi workers in the private sector, subsidizing transportation expenses.

**Saudi Arabia also implemented significant policy efforts within its care economy, recognizing the need to alleviate the disproportionate burden of care often experienced by women.** As The Vision 2030 Health Sector Transformation Program Delivery plan includes policies on Saudization in medical and nursing roles, initiatives to increase the attractiveness of the nursing profession, planning to identify needs in education and healthcare sectors, expanding home-care services, and overall improvement in healthcare provision and performance. The government also put in place programs to expand the provision of care for individuals with disabilities and establish social care houses for the elderly. While not explicitly targeting women, these policies aim to alleviate the disproportionate burden of care often borne by women and create opportunities in sectors that typically attract female workers.

**More targeted towards women, the expansion of the care economy in Saudi Arabia has been accompanied by a concerted effort by the Ministry of Human Resources and Social Development to**

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<sup>85</sup> HRDF 2021

**enhance childcare services throughout the Kingdom.** This dual effort aims to alleviate the burden of care while also serving as a mechanism to activate women in the labor market.<sup>86</sup> In 2018, the Human Resources Development Fund launched the Qurrah program to address the lack of public early childhood education provision and improve affordability. This initiative offers childcare subsidies for children under 6 years old, directly payable to childcare centers, for up to four years and two children. More than just a subsidy, the program also looks to provide a database of care providers through an online portal and also increase the training of childcare center staff and improve standards and efficiency within the sector. By 2021, the Qurrah program had benefited 3,090 women across the Kingdom, enabling those who may not have been able to before, access to formal, accredited childcare centers. However, the program's design was constrained by its dependency on the availability of childcare centers, leading to inconsistencies in geographic coverage (Table 3). Additionally, it may have been less effective in supporting low-income women, who could face challenges due to the phasing out of the subsidy, caps on the subsidy amount, and limits on the number of children covered. That same year, it underwent reforms following consultations with various stakeholders, including employers, beneficiaries, and childcare center owners. Under the new system, the subsidy was raised to 50%, up to 1,600 SAR; the limit on the number of children was removed, provided they were under six years old; and support was no longer tapered off but continued in full until the age of six. Childcare was also covered under the private sector law under Article 159, which mandates that any company which employs 100 women or more in a single city must establish a nursery or contract an external nursery to provide childcare options for the children of their employees. Additionally, some Ministries have initiated their own childcare access programs for working mothers within their sectors. For example, the Ministry of Education decided to establish daycare centers in public and private girls' schools in Saudi Arabia, catering to the children of teachers.<sup>87</sup> Similarly, The Ministry of Municipal and Rural Affairs and Housing set stipulations for malls of a certain size to provide a childcare centers to support the take up of jobs within malls—a field with high Saudization rates and take up by women.<sup>88</sup> Other policies included support for female teachers' salaries and an initiative to train and license Saudi women to establish daycares in their homes.

**Table 3: Take Up of Qurrah Childcare Subsidy Program by Region (2018 & 2021).**

| Region           | Number of beneficiaries in 2018 | Number of beneficiaries in 2021 |
|------------------|---------------------------------|---------------------------------|
| Riyadh           | 256                             | 757                             |
| Mecca            | 188                             | 931                             |
| Medina           | 59                              | 151                             |
| Eastern Region   | 160                             | 968                             |
| Qassim           | 11                              | 49                              |
| Hail             | 12                              | 19                              |
| Tabuk            | 11                              | 14                              |
| Al Jowf          | -                               | 34                              |
| Northern Borders | -                               | 3                               |
| Asir             | 2                               | 18                              |

<sup>86</sup> MHRSD, 2019

<sup>87</sup> Arab News, 2015

<sup>88</sup> Saudi Gazette, 2021

|                               |     |       |
|-------------------------------|-----|-------|
| Jazan                         | -   | 28    |
| Najran                        | -   | 14    |
| Al-Baha                       | 4   | 3     |
| Unspecified Area              | -   | 100   |
| Total number of beneficiaries | 703 | 3,090 |

Source: HRDF Annual Report 2018; HRDF Annual Report 2019

**Furthermore, Saudi Arabia has implemented a variety of programs aimed at supporting flexible work opportunities, which have proven crucial for facilitating female labor force participation.** In 2020 the Ministry of Human Resources and Social Development launched the "MRN" platform, offering hourly-based flexible work contracts to Saudi citizens. This online portal serves as a connection point between job seekers and employers, providing a new avenue for flexible employment opportunities. Additionally, the MHRSD introduced a "telework program" designed to support women and individuals with disabilities. This program ensures the protection of workers' rights while certifying companies to provide teleworking jobs. By connecting employers and employees through its platform, the telework program expands access to both full-time and part-time employment opportunities, offering flexibility crucial for women balancing work and other responsibilities. Moreover, it provides job seekers with the necessary technological requirements and offers training courses to enhance teleworking skills. To further support the advancement of flexible working opportunities, HRDF launched training and support programs targeting women interested in remote work. These initiatives offer upskilling services, employment support, and guidance after employment.<sup>89</sup> In the public sector, in 2022, the government approved work-from-home arrangements to further enhance flexibility. Finally, part-time work is available in Saudi Arabia under labor law, guaranteeing workers their rights, including paid time off and amongst other benefits.

**Wage subsidies, another important program, also played a meaningful, though time-bound, role in supporting women's entry into the labor market.** Evidence shows that these subsidies attracted new female entrants at higher rates than men during 2020–2021, helping explain part of the rise in women's employment during the early 2020s. By reducing firms' hiring costs, the program directly encouraged the recruitment of Saudi workers—especially women. Initially rolled out in 2019 with around 11,000 beneficiaries, the program expanded rapidly, reaching 147,000 recipients in 2020 and 134,000 in 2021. Women consistently benefited more: they received 5% more subsidies than men in 2020 and 60% more in 2021. The effect was strongest in 2020, when subsidized women accounted for up to 11% of the female workforce (compared with 5% for men), and subsidies covered more than 40% of new female entrants. Although this share declined in 2021—to roughly 10% of women and only 8% of new female entrants—the program nonetheless provided critical short-term support, stabilizing women's employment during the most uncertain phase of the pandemic.<sup>90</sup>

**Saudi Arabia has also made significant strides in providing labor market access for women through the support of female entrepreneurs.** In 2016, only 21.5 percent of all SMEs were led by women, however, by 2022, that number had reached 45 percent.<sup>91</sup> Following reforms eliminating discriminatory financial practices and guardian approval requirements for business startups, a series of government programs,

<sup>89</sup> Telework employment centers were established by HRDF to provide services for skills training and employment support to female job seekers for telework employment, along with post-employment services to help maintain job stability and development (HRDF, 2021).

<sup>90</sup> Kaddah, 2025

<sup>91</sup> Monshaat, 2022

notably focusing on women, were put into place to support Saudi entrepreneurs. The Ministry of Commerce established dedicated business centers across the Kingdom, offering essential resources and support for female entrepreneurs as well as resources for registering and supporting home businesses.<sup>92</sup> Under the Ministry of Commerce, the Small and Medium Enterprises General Authority (Monshaat) operates the SME Academy, where 40 percent of beneficiaries are women. This authority provides specialized training programs in digital marketing, financial management, and prototype development tailored to empower female entrepreneurs. It also runs a university startup initiative, to support student entrepreneurs, where over 60 percent of the receiving beneficiaries are women.<sup>93</sup> The Social Development Bank (SDB) plays a crucial role in supporting Saudi women through financial and non-financial programs. Between 2016 and 2019, SDB witnessed a 400 percent increase in support for female projects, where support reached 2.3 billion SAR for female freelancers, 1.6 billion SAR for financing SMEs, and over 60,000 beneficiaries of training and non-financial entrepreneurial services. It also supporting female entrepreneurs by offering training for freelance jobs and providing micro-enterprise financing support.<sup>94</sup> The bank also provides micro-enterprise financing (as of August 2022, 123,000 women have benefited) and organizes competitions specifically for female entrepreneurs, fostering innovative business ideas catering to women's needs. These concerted efforts, including financing, skills development programs, and support services, have significantly contributed to the growth and success of female-led businesses, and providing them direct avenues to the labor market through entrepreneurship.

**Within the ICT, Saudi Arabia witnessed a rise in the participation of women in the tech sector largely spearheaded by the Ministry of Communications and Information.** The Ministry with its own Women's Empowerment strategy has led several initiatives to increase the employment of women in the ICT sector, including the hosting of multiple editions of a women empowerment forum as well as a Women in Data Science conference across 12 cities in the Kingdom, launch of training programs, and support for female tech-entrepreneurs. The ministry also has a Women Empowerment Council in partnership with the Ministry of Human Resources and Social Development, aimed at creating policies that support female workers and entrepreneurs in the sector. The Ministry also has a "Technology Women Leadership" award for women and entities in both the public and private sector, aimed to incentivize the involvement of women in the ICT, empowering them as leaders, and encouraging the provision of supportive work environment for women. The participation rate of women in the ICT sector grew from 7 percent in 2017 to more than 33 percent by the end of 2022, an average higher than all G20 countries and the EU. In addition, by 2021, Saudi Arabia had a higher startup rate for women than men.<sup>95</sup> The Ministry also launched a "Digital women Leader" program to train women within the sector on leadership skills. Other initiatives include public-private-partnerships to expand skills and education for women in the field, such as the launch of the Apple Developer Academy in collaboration with the Princess Nourah Bint Abdulrahman University, specifically to train female Apple developers in the field of programming. The Ministry also has many other training and employment support programs for youth and the general public, amongst its many female-tailored initiatives.<sup>96</sup>

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<sup>92</sup> Ministry of Commerce, 2024

<sup>93</sup> Ministry of Finance, 2023

<sup>94</sup> Social Development Bank, 2024.

<sup>95</sup> Endeavor, 2022.

<sup>96</sup> Ministry of Communications and Information Technology, 2022

**In the Technical and Vocational Education and Training (TVET) sector, the Technical Vocational and Training Corporation (TVTC) has been actively engaged in increasing women's enrollment.** TVTC has established several institutions dedicated to female TVET education, including 14 international technical colleges for girls, 37 female technical colleges, and 3 specialist digital technical colleges. Furthermore, it has been expanding course-offerings, deviating away from when it had previously offered more traditionally female-dominated fields, as well as beginning to integrate female students in what were previously male-only colleges. TVTC has also been organizing regional exhibitions and nationwide competitions and technical summer clubs offering free courses in various TVET fields for young girls and boys to introduce them to the possibilities of TVET education. It provides free training courses tailored for Saudi women, with a focus on mobile technical and electrical maintenance. They have also expanded their collaborations with universities and the private sector to advance women's education and training, facilitating opportunities such as internships and specialized courses dedicated to female employees.

**The range of policies and initiatives introduced throughout the Kingdom aim at creating an enabling environment for working women.** While the removal of legal barriers was a pivotal step, the introduction of these programs was indispensable in guiding and activating women in areas of the labor market that were previously unfamiliar. Ranging from active labor market programs to comprehensive childcare support and entrepreneurial resources, these policies have facilitated the entry, integration, retention, and advancement of thousands of women in the labor force. Yet, these initiatives represent just a fraction of Saudi Arabia's broader efforts. Beyond these, a multitude of programs and interventions, spanning from nationwide initiatives to grassroots projects, collaboration with the private sector, academia, and local communities, all aimed at fostering a more inclusive and supportive environment for women's participation in the labor market.

#### 4.2.4 Changes in social norms

**These reforms and policies, crucial for boosting female labor force participation, coincided with a societal transformation wherein social norms shifted to embracing, even expecting, women to work.** However, research shows that this readiness seems to have been more of a private belief among Saudi citizens, and considerable doubts about the social acceptance of women working remained. It indicates that many Saudi men and women were receptive to the idea of women working, but at the same time they held a belief that everyone else was less open to women working. The rapid pace of change can likely be attributed to the influence of social norms, which were in a state of imbalance. Initially, while individuals were generally supportive of women working, they held the belief that others were not supportive. As these perceptions aligned with the actual reality, change occurred swiftly.

**It is important to note, that while past and amended versions of the Saudi Labor Law never mandated guardian approval for employment specifically, it was unofficially enforced.** In practice, however, employers have embedded guardian consent into their internal human resources policies and procedures on hiring female employees, some placing it as a condition for a woman to join their organization. Employers often integrated guardian consent into their internal human resources policies, making it a de facto requirement for female employees. Despite several legislative efforts (with legislation as early as 2011) to clarify this issue, such practices persisted within both the private sector and families, perpetuating strict social norms over legal regulations. This underscores the necessity for legislation to be complemented by ongoing reforms, messaging, and awareness campaigns to effect meaningful change. As such, this readiness has likely been encouraged—or at least reenforced—by the government's clear

emphasis on the importance of increasing the labor force participation of Saudi women as part of Vision 2030 and the accompanying drive of reforms and program initiatives.

**A study conducted by the Abdul Latif Jameel Poverty Action Lab (J-PAL) examining the impact of information provision on men's perception of female labor force participation revealed significant discrepancies.** While 87 percent of married men supported women working outside the home, 72 percent underestimated others' support for this idea. The intervention found that correcting these misperceptions increased men's willingness to let their wives join the labor force and resulted in more women applying for jobs and signing up for job-matching services.<sup>97</sup> Another study on students' career and family aspiration in Saudi Arabia highlighted the impact of information provision on their expectations of future employment. Correcting their underestimation of female peers' aspirations not only raised their own expectations but also prompted conversations with their families about this matter. These studies may suggest that increased visibility of the acceptability of women in the workplace, aided by role models, support programs, media awareness, and Vision 2030's messaging, may have gradually contributed to the shifting societal perceptions, making women's entry into the labor market more socially acceptable.<sup>98</sup>

**The revelation of these misperceptions may have had a profound impact.** When Saudi men became aware of the actual level of support for women working, they displayed increased willingness to allow their wives to seek employment. This shift in attitude may have translated into practical outcomes, with more women applying for jobs, attending interviews, and ultimately joining employment. In essence, the mere correction of these misperceptions triggered a positive ripple effect in women's labor force participation.

#### 4.2.5 The role of the private sector and the pandemic as an accelerator

**Over the past ten years, Saudi Arabia has undertaken significant strides toward economic diversification, steering away from its traditional over-reliance on oil.<sup>99</sup> In fact, the private sector's contribution to GDP<sup>100</sup> has increased from 39 percent in 1990 to 45 percent in 2023<sup>101</sup>.** This pivot has invigorated the service sector, with remarkable growth observed across various industries. For instance, between 2012 and 2022, the real estate sector expanded by 56.7 percent, creating 265,000 jobs, while the accommodation and food service activities surged by 56.8 percent, contributing an additional 171,000 jobs. Similarly, the human health and social work sector saw an impressive increase of 66.3 percent, amounting to 360,000 jobs. Furthermore, the category of other services witnessed an almost two-fold surge, generating a staggering 2.6 million jobs (Figure 24 and Figure 25).

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<sup>97</sup> Bursztyn, González, and Yanagizawa-Drott, 2020

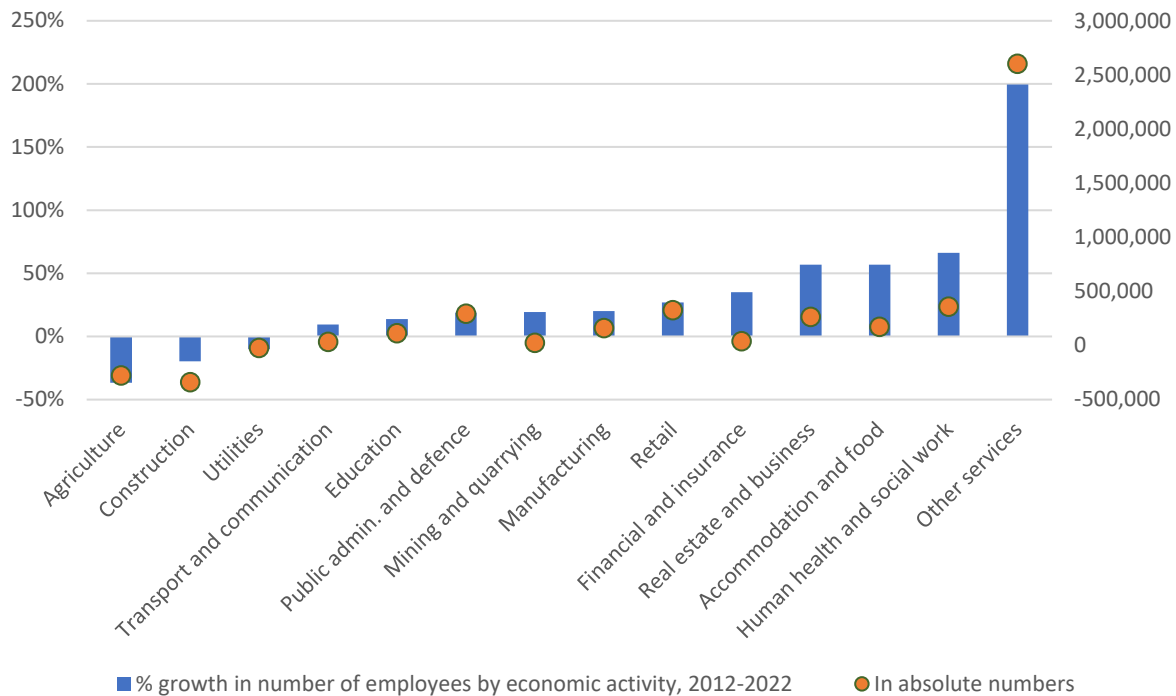
<sup>98</sup> Aloud, Al-Rashood, Ganguli and Zafar, 2020

<sup>99</sup> See, for instance, Alhmoud et al., 2023.

<sup>100</sup> State Owned Enterprises are classified under the public sector in Saudi Arabia

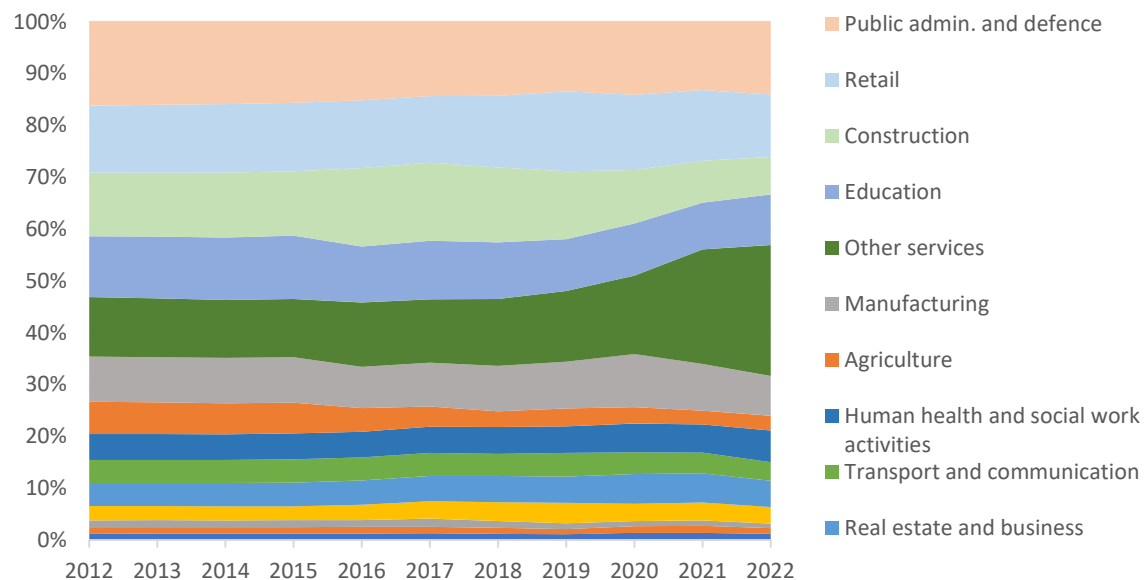
<sup>101</sup> GASTAT, 2023

**Figure 24– Growth in total number of employees in Saudi Arabia by economic activity, 2012 to 2022**



Source: GASTAT

**Figure 25 -Percentage distribution of number of employees by economic activity**

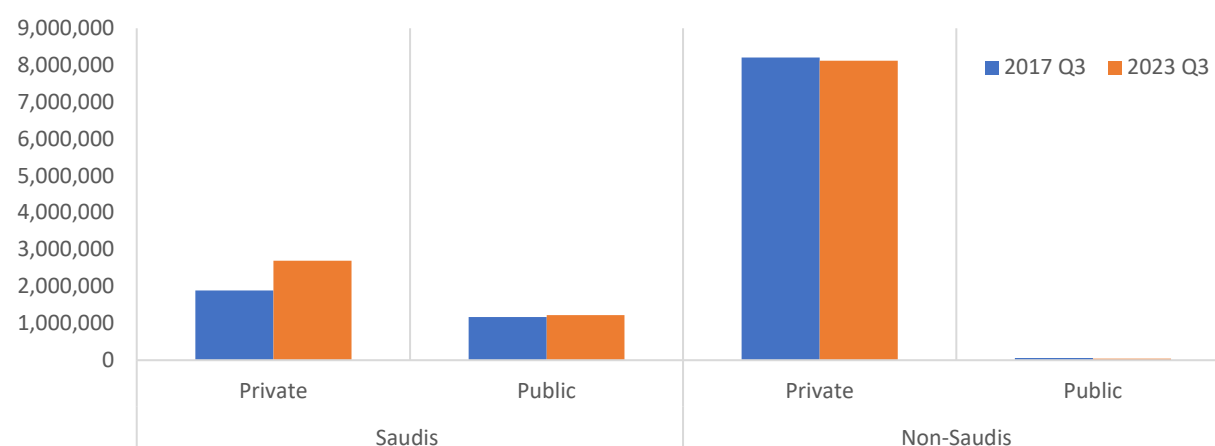


Source: GASTAT

**There has been a pronounced historical division in the employment sectors in the country, with a pattern of Saudi nationals predominating the public sector, while the private sector has been**

**predominantly staffed by migrant labor (Figure 26).** Certain industries, such as construction, manufacturing, and wholesale and retail trade, have been particularly reliant on this foreign labor force. In an effort to recalibrate the labor market dynamics, the Kingdom introduced a suite of measures between 2017 and 2018 aimed at incentivizing the private sector to favor the employment of Saudi nationals over expatriates. These measures included the implementation of a more stringent quota system for companies with the requirement to hire a minimum number of Saudi workers, as well as the imposition of expanded expatriate levies, which, in a notable shift from previous policy, were extended to include expatriates' dependents.

**Figure 26- Number of workers by sector by nationality**



Source: GASTAT

**As a consequence of nationalization interventions as well as the introduction of the expatriate levy (a monthly fee on each expatriate worker), there was a significant outflow of foreign workers from the country.** Expat levies and national hiring quotas restricted access to foreign labor either in number or in price, which led to many expatriates leaving Saudi Arabia (2018 to 2019 data, Figure 27). The national hiring quotas, known as Nitaqat, led to an increase in the employment of Saudi women from their introduction in 2011 until the stabilization of hiring rates in 2014. Further quota increases in 2017 contributed to a further surge in hiring. However, the program also generated notable unintended consequences, as the study indicates that Nitaqat prompted around 11,000 firms to exit the market.<sup>102</sup>

**Furthermore, the 2021 increase in the Nitaqat reference wage—which raised the minimum salary required for Saudis to count as a full national under the Nitaqat program—might also have contributed to more Saudi women taking jobs.** Because many Saudi women are hired exactly at the Nitaqat reference wage, there is a concentration of Saudi women around this wage range. Most Saudi men, on the other hand, earn above the reference wage. Hence, the increase in the reference wage had a disproportionate impact on female employment. Introduced during a period of heightened labor demand, the higher threshold encouraged firms to hire more Saudi women, even at the increased effective minimum wage. The policy generated two opposing effects: It raised firms' costs of hiring Saudis, yet it also made labor market participation more attractive for new entrants, particularly women whose reservation wages

<sup>102</sup> For a detailed analysis of the effect of hiring quotas see Miller et al. 2022

exceeded the previous Nitaqat reference wage. However, without corresponding improvements in productivity, the sustainability of these gains remains uncertain, as there is a risk that employment increases reflect firms' compliance with Nitaqat quotas rather than genuine market-driven demand for Saudi women workers.<sup>103</sup>

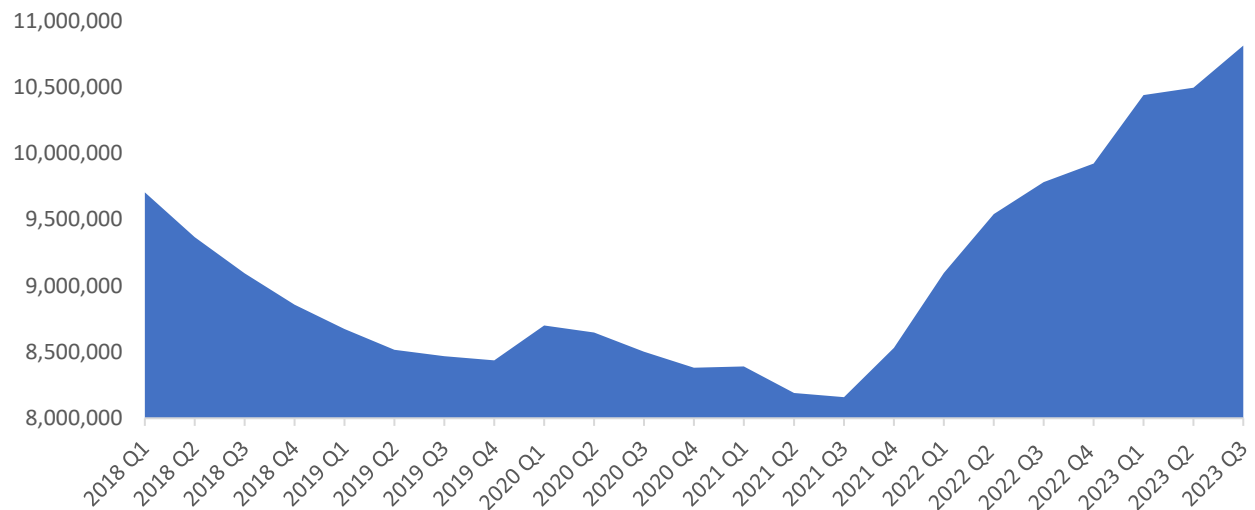
**The COVID pandemic also exerted additional pressures on the private sector employment between 2020 and 2021, as the economy slowed down, and borders were shut due to sanitary reasons.** For example, the construction industry, which had been on a consistent upward trajectory in job creation, and is a significant employer of foreign labor, experienced a pronounced decline during the COVID pandemic as many foreign workers departed or were compelled to leave the Kingdom amidst the crisis. Notwithstanding these challenges, the private sector demonstrated a robust recovery, with employment figures by the third quarter of 2021 not only rebounding to surpass the levels seen in the first quarter of 2018 but also continuing an upward trajectory to add a further one million jobs in the subsequent year.

**These evolving dynamics have led to a substantial shift in the distribution of employment by economic activity, reshaping the labor landscape in Saudi Arabia and opening up employment prospects for Saudi women.** The initial exit of expatriate workers due to the policy changes and reinforced by the COVID crisis created a labor vacuum within the private sector, prompting an absorption of Saudi women into employment, a trend particularly noticeable from 2019 to 2021. Following this initial adjustment period, the private sector experienced a period of recovery and expansion, during which employment gains for Saudi women continued to materialize (Figure 28). This sustained integration of women into the labor force reflects a transformative shift in the Kingdom's employment landscape, underlining the pivotal role of female participation in the country's economy.

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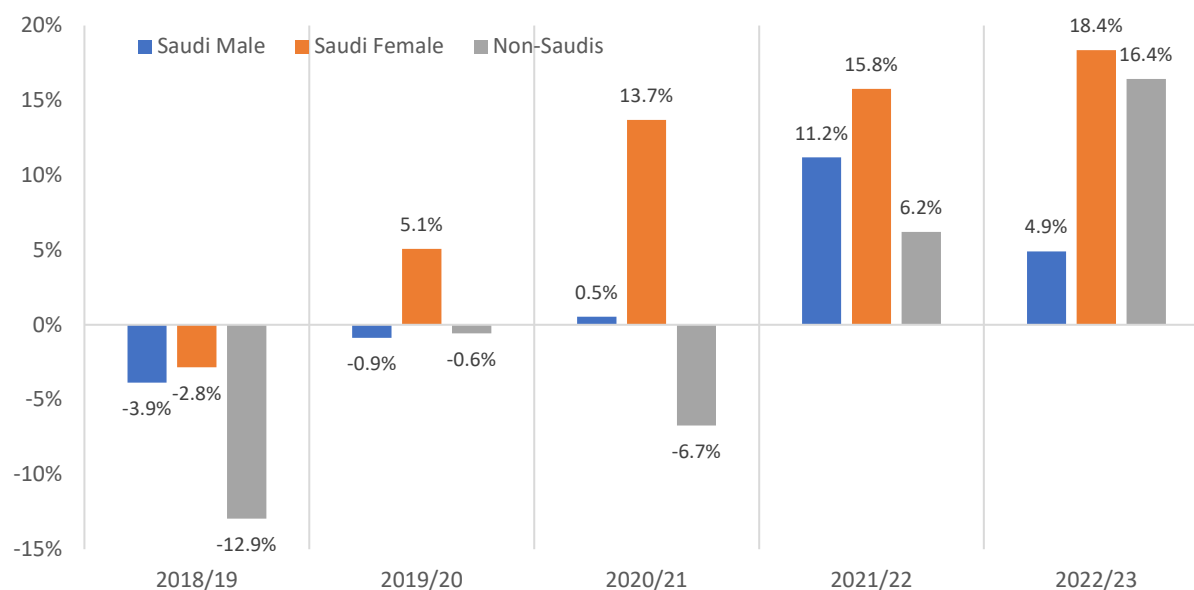
<sup>103</sup> Kaddah, 2025

**Figure 27– Total number of employees in the private sector**



Source: GASTAT

**Figure 28 - Year over year difference in employment in the private sector, by gender and nationality**

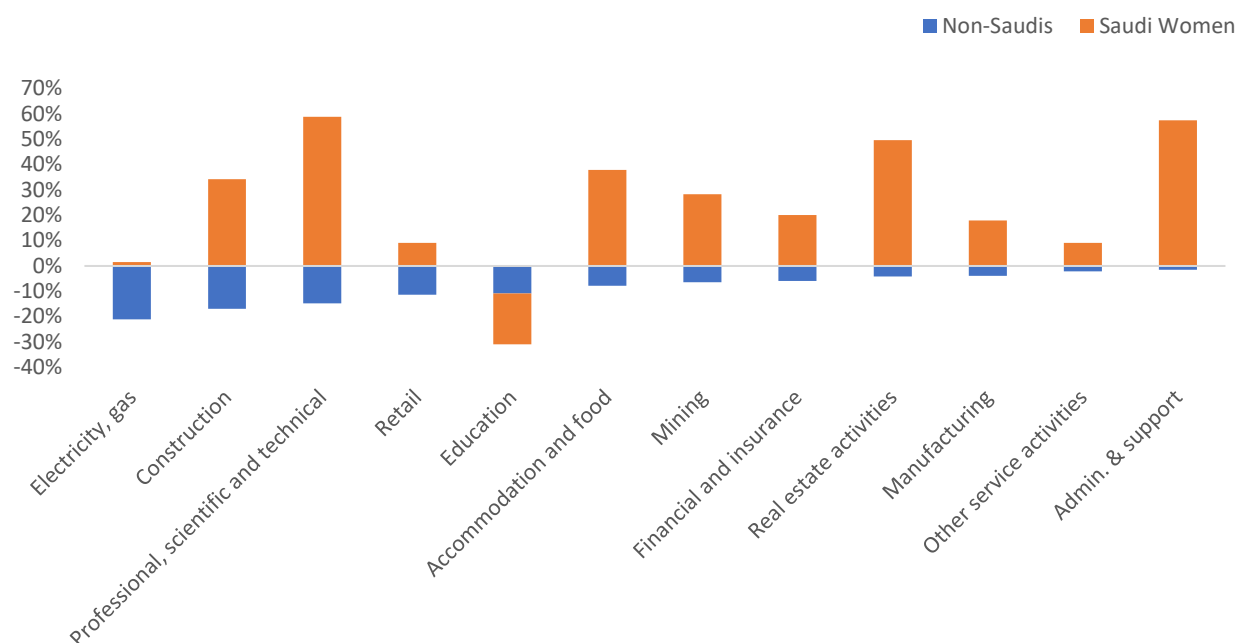


Source: GASTAT

**The substitution effect is visible for the economic activities where non-Saudis have sustained higher job losses.** Industries such as energy supply, professional activities, construction, administrative and support services, accommodation and food service activities, and retail and trade witnessed substantial employment declines among non-Saudi workers between 2019 and 2021 (Figure 29). Despite the significant losses among expatriate workers, these industries also saw significant employment growth for Saudi women. This dynamic illustrates the impact of the COVID crisis in Saudi Arabia. Following an initial economic slowdown and extensive population lockdowns to curb the spread of the pandemic, the

economy gradually reopened. However, by this time, a considerable number of expatriate workers, who were predominant in the private sector, had returned to their home countries. In response, private sector companies sought alternative workers, providing an opportunity for women to step in and fill the vacancies left by departing expatriates.

**Figure 29 – Changes in private sector employment from 2019 Q1 to 2021 Q1**

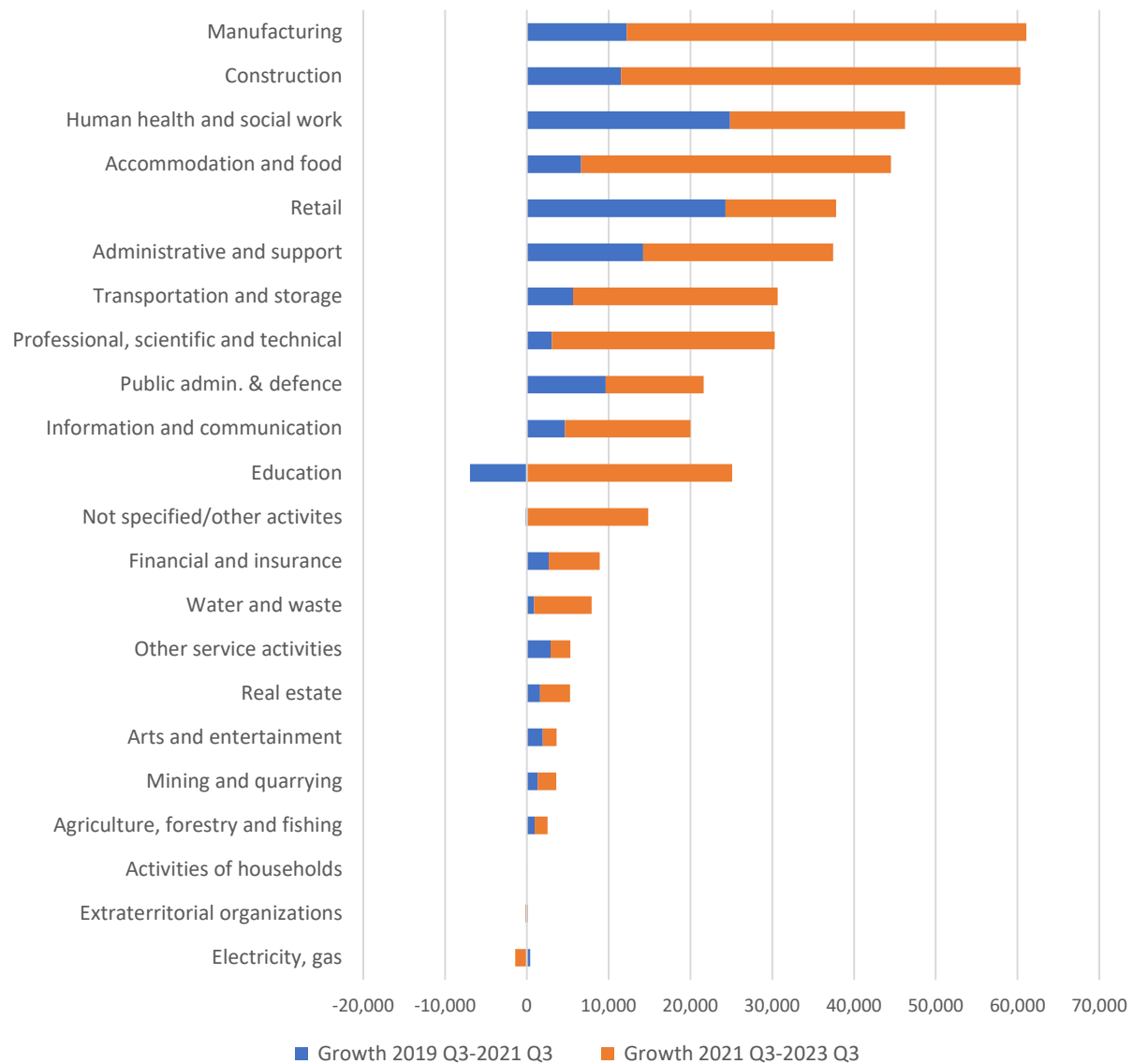


Source: GASTAT

Note: employment in absolute numbers is substantially smaller for Saudi women, therefore changes in employment numbers result in higher changes in share than for non-Saudis.

**While the initial phase of the labor force transformation was instrumental in facilitating the entry of Saudi women into the labor market in greater numbers, it was the subsequent phase that proved more consequential in terms of actual employment gains.** During the initial phase, which lasted until the third quarter of 2021, Saudi women achieved notable employment increases primarily within sectors such as human health and social work activities; wholesale and retail trade, administrative and support service activities; manufacturing; construction; and public administration and defense. However, as the private sector commenced its recovery, a second wave of employment opportunities emerged for Saudi women, expanding their presence into sectors previously less common for their employment. These sectors include accommodation and food service activities; education; information and communication; professional, scientific, and technical activities; and transportation and storage (Figure 30). The breadth of these new opportunities points to a diversification of the Saudi private sector and increasing dynamism, leading to employment avenues for women, aligning with the Kingdom's broader economic reforms.

**Figure 30– Changes in absolute number of jobs in the private sector between 2019 Q3 and 2023 Q3, Saudi Women**



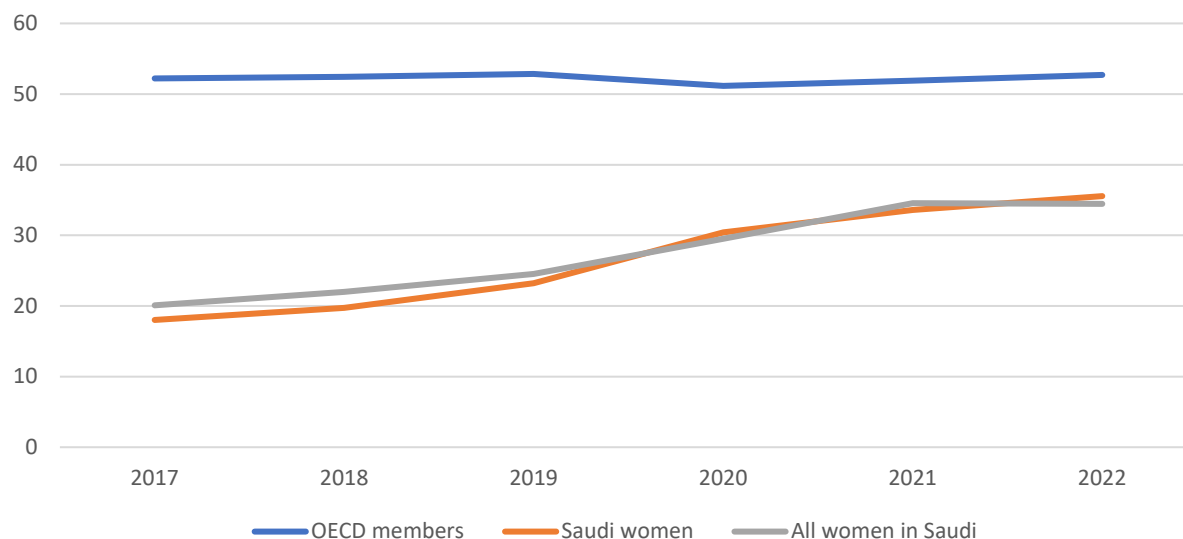
Source: GASTAT

#### 4.3 What are the remaining barriers for women to enter the labor market in KSA?

**Despite the notable progress in female labor force participation, Saudi Arabia still lags significantly behind other high-income countries such as those within the OECD (Figure 31) and regional peers like Qatar (Figure 15).** While Saudi Arabia experienced a surge in participation driven by a blend of social and economic factors, it's important to note that the country initially started from a very low baseline in terms of overall participation. This partly accounts for the substantial room for further integration of women into the labor market and employment. Despite the implementation of various reforms and new programs, persistent gaps continue to impede and discourage women from entering the labor force. This

situation explains why women still constitute two-thirds of the inactive population in the country according to GASTAT (2024).

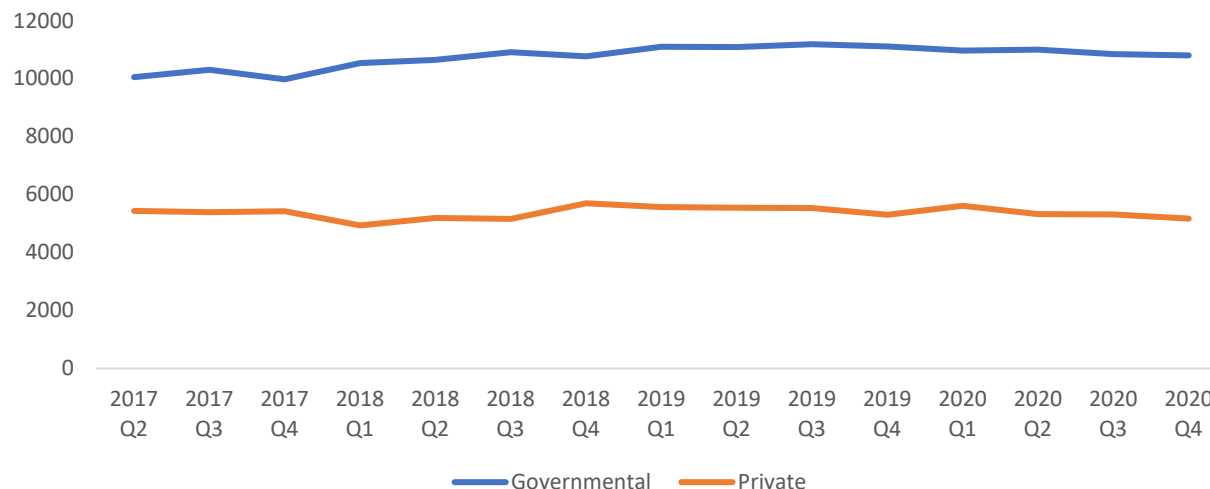
**Figure 31– Female labor force participation rate, 2017 to 2023 (ages 15+) (national estimate)**



Source: GASTAT, WDI.

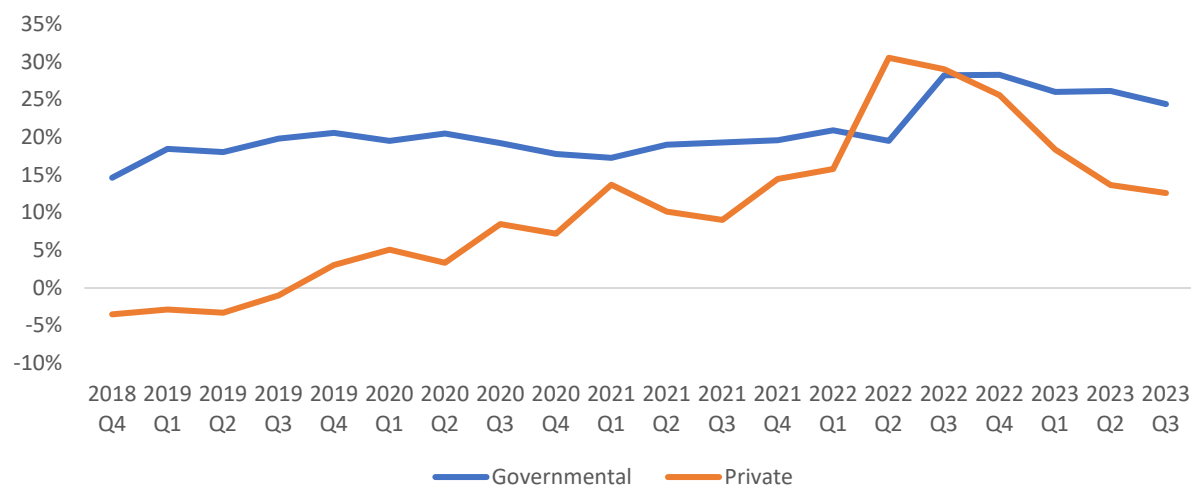
**One of the primary factors contributing to the in the participation of women is the influence of social norms and preferences, particularly regarding employment in the public sector.** Despite notable legal reforms that have improved women's rights, societal expectations continue to shape women's decisions regarding participation in the labor force. Moreover, the enduring preference for public sector employment among Saudis in general is a significant driver. This preference is fueled by the perception of better compensation, benefits, and working hours compared to the private sector. But this is not simply perceptions, in fact, the wage differential for women working in the private and public sector continued to be highly significant and stood at almost double when the data was last published in 2020 (Figure 32). Consequently, women tend to set higher reservation wages, impacting their readiness to accept positions in the private sector, especially those offering lower pay. The public sector also continues to hire women through other channels, such as private sector contracts to conduct governmental duties (Figure 33). The growth in this type of hiring has remained stable, and continues to overpass the growth of employment for Saudi women in private companies,

**Figure 32 – Average Monthly Wages for Saudi Women by Sector in SAR**



Source: GASTAT.

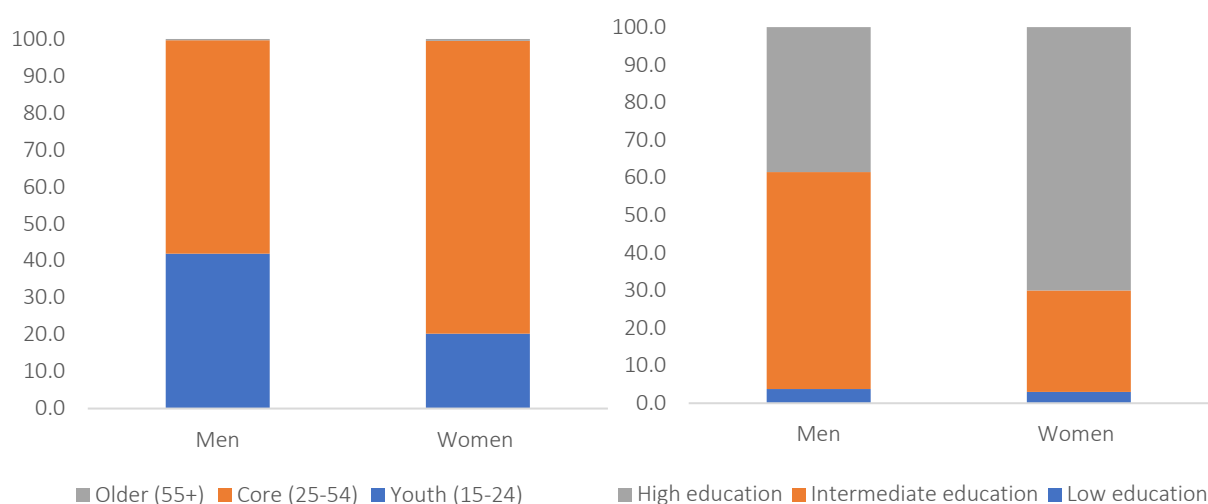
**Figure 33– Year-over-year Growth in Formally Employed Persons in the Private Sector by activity, Saudi women**



Source: GASTAT

**Skills mismatch and employability also present significant hurdles for many Saudi women, particularly those who are of core working age and highly educated.** Despite holding university degrees, a notable portion of unemployed Saudi women often lack the technical expertise or practical experience that employers seek (Figure 34). This discrepancy is a common challenge observed across various MENA countries, where education does not always translate into meaningful employment opportunities. The skills imparted by the education system frequently fail to align with the dynamic needs of the job market. This misalignment may stem from educational profiles that do not match available positions in companies, or a lack of recognition for the skills cultivated within educational institutions by the private sector.

**Figure 34 – Percentage distribution of Saudi unemployed by age and educational level, 2023 Q3**



Source: GASTAT

**Furthermore, the limited demand for Saudi female labor persists within the private sector, largely driven by a preference for hiring foreign workers who often accept lower wages and fewer benefits.** While initiatives such as quotas mandating a minimum number of Saudi employees have bolstered female employment rates, underlying structural challenges in the labor market remain unaddressed. The significant shifts in employment distribution and the substantial increase in participation and employment among Saudi women have rendered them more competitive and, to some extent, more cost-effective compared to their male counterparts due to wage decreases. However, despite these advancements, Saudi women still represent less than 10 percent of the total private sector employment, indicating ample room for expansion. Therefore, it is crucial to prioritize efforts aimed at enhancing the competitiveness and desirability of Saudi women for private sector employers.

**Lastly, childcare accessibility and mobility constraints persist as significant challenges for women in Saudi Arabia.** Despite the availability of programs like Qurrah offering childcare subsidies, their reach remains limited, and coverage is insufficient. Furthermore, the scarcity of childcare providers in the country, coupled with a developing market, exacerbates the issue. Moreover, although women's mobility has improved with the right to drive, public transportation options remain inadequate, particularly for lower-income women and those residing outside major cities. While programs such as Wusool offer transport subsidies, the limited availability of public transportation, even within urban areas, poses substantial obstacles for women commuting to work, particularly those unable to afford personal vehicles.

**In summary, while Saudi Arabia has made notable progress in enhancing women's rights and participation in the labor market, challenges related to social norms, skills and employability, demand for female labor in the private sector, limited social protection programs, and low access to childcare and mobility persist.** Addressing these gaps requires ongoing reforms, targeted programs, and initiatives that support women's integration into and retention within the labor force.

## 5. Policy implications and lessons for the wider MENA region

**Promoting women's participation in the labor market and employment is crucial for addressing gender disparities and empowering women towards economic freedom and career advancement.** By enhancing the utilization of human capital through increased female labor force participation, not only can worker incomes rise, but a country's resource allocation can also improve. Therefore, it's imperative to focus efforts on supporting and incentivizing women to enter and sustain their presence in the labor force.

**Efforts to reconcile family and career aspirations have been pivotal in bolstering women's participation in the labor force, a facet that is still evolving globally and within the MENA region.** This endeavor involves granting women the opportunity to pursue both professional endeavors and familial responsibilities without compromising either. It encompasses a comprehensive array of policies designed to enable women to sustain their careers amidst shifts in family dynamics. These policies encompass various measures such as parental leave, flexible and part-time work options, access to childcare facilities, and other institutional mechanisms to support caregiving responsibilities. Beyond merely facilitating women's participation, the implementation of policies that reconcile work and family commitments also holds promise for positively impacting fertility rates and ensuring the maintenance of a population size above replacement levels. By alleviating the pressure on women to exit the labor force to raise a family, these initiatives contribute to fostering a more balanced and sustainable societal framework.

**One of the most widely embraced initiatives across nations has been the expansion of childcare provisions, a measure supported by global evidence showcasing its efficacy in alleviating time constraints for women.** Moreover, this measure also has the potential to catalyze shifts in social and cultural norms by normalizing the delegation of childcare responsibilities.<sup>104</sup> To achieve this, a variety of strategies can be adopted, including the expansion of childcare facilities, extending operating hours, and mandating employers to offer childcare services. In some countries, such as Saudi Arabia and Egypt,<sup>105</sup> governments have implemented schemes such as vouchers and subsidies to alleviate the financial burden on working women. However, for these programs to thrive, governments must undertake proactive measures to communicate the availability of such subsidies to the population and be prepared to scale them up in response to increasing demand. By integrating childcare support into broader efforts aimed at reconciling work and family life, governments can further empower women to pursue their professional aspirations while fulfilling their familial duties, thus contributing to the overarching goal of gender equality and sustainable societal development.

**Other policies aimed at integrating caregiving responsibilities with work, such as parental leave and flexible work environments, have also proven to be effective in improving women's participation and retention rates.**<sup>106</sup> Enhanced parental leave policies provide women who aspire to start a family with reduced opportunity costs when considering having children. This assists in managing both their professional and familial obligations, thereby facilitating a smoother transition back into work following childbirth.<sup>107</sup> Additionally, offering part-time and flexible work arrangements can assist women in effectively balancing work and family commitments, if they so choose. Their importance in this context is

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<sup>104</sup> Halim et al. 2023

<sup>105</sup> Zeitoun, 2022

<sup>106</sup> Amin and Islam, 2022.

particularly significant in the light of other growing trends, including increasing commuting times and rising housing and childcare costs. It helps women to gain access to and remain in paid work, allowing them to obtain work experience and promotion possibilities similar to other workers. Saudi Arabia has implemented both of these practices in previous years, by expanding the parental rights and creating new flexible work arrangements.<sup>108</sup> The Jordanian government has also issued new regulations to make work more flexible through part-time contracts and remote work and to eliminate restrictions on the types of jobs and hours women can work.<sup>109</sup>

**Additional policies aimed at fostering the inclusion of women in the labor force pertain to the legal framework that safeguards and facilitates their entry into employment and access to financial resources.** Removing legal barriers for women's employment, providing legal regulations against discrimination of hiring and termination practices, and the provision of gender neutral workplaces can encourage more women to join the labor force due to a larger set of jobs available and less security concerns.<sup>110</sup> Furthermore, empowering women with greater control over financial resources enhances their bargaining power and reduces the risk of resource deprivation, thereby increasing their labor force participation. This seems to be particularly pronounced among women whose husbands hold more conservative attitudes towards women's employment.<sup>111</sup>

**Lastly, programs aimed at assisting women in re-entering or entering the labor market for the first time play a crucial role in facilitating their transitions.** Programs which focus on developing socio-emotional skills, problem-solving abilities, self-awareness, and negotiation tactics, can significantly enhance women's prospects of engaging in employment outside the home. Initiatives that help women prepare for their job search can also support them by reducing their concerns about securing employment opportunities.<sup>112</sup> Overall, evidence indicates that targeted interventions, such as job and vocational programs tailored specifically to women's needs, yield greater uptake and impact. Measures like conducting diagnostics to identify challenges unique to women, providing childcare and transportation assistance for training attendance, and offering online training platforms are particularly effective as they cater to women's diverse needs and foster a sense of safety and inclusivity in these environments.<sup>113</sup>

**A crucial aspect to consider is that all these interventions must be backed by a societal acceptance of women entering the labor force, as evidenced in Saudi Arabia and various other contexts.** Hence, policies targeting the transformation of social norms that impede women's development opportunities are indispensable. In contexts where gender-specific obstacles persist, gender-neutral programs may not effectively benefit women unless they incorporate specific targets and outcomes tailored to address gender disparities. For instance, intra-household gender dynamics can influence the effectiveness of interventions aimed at promoting women's engagement in the labor force, as their partners or family members might not be supportive of these goals.<sup>114</sup> However, interventions targeting gender norms can yield positive results; as has been found in school programs addressing gender roles, which resulted in more progressive attitudes and equitable behaviors. Moreover, providing information about societal

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<sup>108</sup> European Commission, 2009

<sup>109</sup> Halim et al. 2023

<sup>110</sup> Miller et al. 2022, Halim et al. 2023

<sup>111</sup> Field et al. 2021

<sup>112</sup> McKelway, 2021

<sup>113</sup> Beegle and Rubiano-Matulevich 2020

<sup>114</sup> Crepon, 2023

perceptions can help reshape general opinions, such as the misconception that men in conservative societies may be unsupportive of working women, as evidenced in Saudi Arabia. Moreover, mass media campaigns advocating for the inclusion of women can also be impactful. Therefore, it is important to complement female labor force participation programs with initiatives that provide information to challenge and update misperceptions about certain beliefs and social norms.<sup>115</sup>

**However, it is crucial to note that Saudi Arabia experienced a significant positive labor demand shock following the COVID-19 pandemic, which enabled previously unemployed or inactive women to enter the workforce.** This development is particularly important, as the success of women who found employment shortly after joining the labor force served as a motivating factor for others considering entry. If other policies successfully boost participation, as mentioned above, but women do not secure jobs upon entering the labor market, they may become discouraged and revert to inactivity. Therefore, it is equally important to address labor demand and develop programs that support employment opportunities when feasible.

**The integration of women into the labor market requires a multifaceted approach, including initiatives that balance family and work responsibilities, challenge prevailing social norms, and offer support systems for women entering or re-entering the workforce. These efforts form a comprehensive package to promote gender equality and enhance women's participation and career advancement. However, it is also essential to consider the influence of social norms and the private sector's capacity to ensure these policies are effectively embraced.**

## 6. Conclusions

**Female labor force participation remains persistently low in the MENA region, with significant barriers hindering progress, particularly in lower-income countries.** These obstacles are rooted in several common factors, including deeply ingrained gender-unequal social norms, disproportionate burdens of unpaid care and domestic responsibilities, legal frameworks that perpetuate gender discrimination, limited access to education and vocational training, misalignment of skills needs with the private sector, and inadequate supportive policies. These systemic challenges not only dissuade women from entering the labor force but also perpetuate occupational segregation and wage disparities.

**However, amidst this challenging landscape, there is a noteworthy case of significant progress in female labor force participation, notably observed in Saudi Arabia.** Within six years, Saudi Arabia has witnessed a remarkable increase of over 100 percent in the participation of Saudi women in the labor force, from 17.4 percent to 35.9 percent. This surge is attributed to several key factors. Vision 2030's institutional changes are evident across all levels of policymaking, and legal reforms were introduced to eradicate employment discrimination, workplace sexual harassment, and obstacles to women starting businesses. Additionally, proactive policies have been introduced, such as ALMPs and initiatives in the care economy, flexible work arrangements, and maternity benefits, which have been linked to higher female labor force participation in developed countries. The private sector has also played a crucial role, with economic diversification and increased demand driving the employment of women. The global pandemic further accelerated this trend as expatriates departed Saudi Arabia due to health restrictions.

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<sup>115</sup> Bursztyn et al. 2020; Dhar et al, 2018; Crepon, 2023

**Moreover, this transformation was bolstered by a societal readiness for change.** The ripeness of social norms observed in Saudi Arabia played a pivotal role in bolstering the transformation towards increased female labor force participation. Over recent years, there has been a notable shift in social norms, marked by a growing acceptance of women's participation and employment and a recognition of their valuable contributions to the economy. This evolving mindset reflects a broader trend towards gender equality and women's empowerment.

**While gaps still exist in Saudi Arabia, the strategies adopted by the leadership can serve as a blueprint for other nations seeking similar outcomes.** Efforts to balance family and work responsibilities, coupled with protective legal regulations and a dynamic private sector ready to absorb new entrants, have proven essential. However, it is crucial to recognize that societal acceptance of women's participation in the labor force is paramount. Hence, any intervention package must also address the centrality of societal norms and ensure they are conducive to change.

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