

SUMMARY REPORT

On

FORUM ON WOMEN IN ENERGY

(FoWiE 2017)

Theme: Women – Driving Energy Liberalisation

13 July 2017 | Kuala Lumpur Convention Centre

Jointly organized by MGA & PEMANDU Associates

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**FORUM on WOMEN IN ENERGY (FoWIE)
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A. Executive Summary

Forum on Women in Energy (FoWIE), a half day event held in conjunction of 16th Asian Oil, Gas & Petrochemical Engineering Exhibition (OGA), was designed to provide a platform for prominent speakers, top women leaders, middle management and young executives to share insights and discuss strategies on how to increase women empowerment and involvement in the board room and in decision making positions. The forum specifically deliberated on challenges and the enabling ecosystems that should be engaged to spur greater women participation in the energy industry as well as to redefine the roles women will play in the near future.

Themed “Women – Driving Energy Liberalisation” , this forum was co-organised by Malaysian Gas Association (MGA) and PEMANDU, and supported by the 30% Club, PETRONAS Leading Women Network (PLWN), Shell Women Action Network (SWAN) and GE’s Women Network. About 200 participants from across the industry attended the forum that has not only offered opportunities to valuable sources of insights and networking opportunities, but to key takeaways on how to enhance organisation’s talent agenda and competitive advantage by promoting diversity and gender equality in the board room.

The forum hosted 4 presentations and two panel discussions – including a key note address by the Minister in the Prime Minister’s Department. The sessions deliberated the lack of women participation at every level of the corporate pipeline, especially at C-suites and board positions. Despite clear evidence that gender diversity brings value, merits seems to be the question. Even mandatory quota seems unfavorable as many women opposed the idea of being a token representative at board level. So the question is what else needs to be done? To what extend do we need to push policy? How could leaders help? What is the role of other female leaders? More importantly how could family lend their support? What kind of enablers needs to be engaged and nurtured upon so that women can thrive at the workplace? These are but some of the questions raised. Further issues are discussed in Section D.

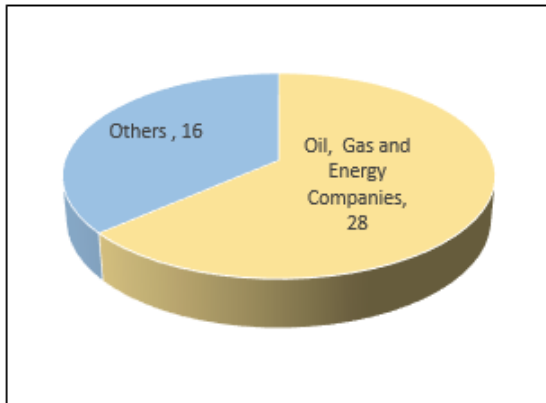
The recommendations and key takeaways are deliberated in Section E - Recommendation. Yes, policy is necessary and even the mandatory quota is required to accelerate the journey to the top. However what stands out clearly is that women need SUPPORT above all else. The enabling ecosystem such as flexible work arrangement, technology and family support to name a few, need to be fostered to facilitate women to work and contribute directly through their skills and talent for the growth of the nation.

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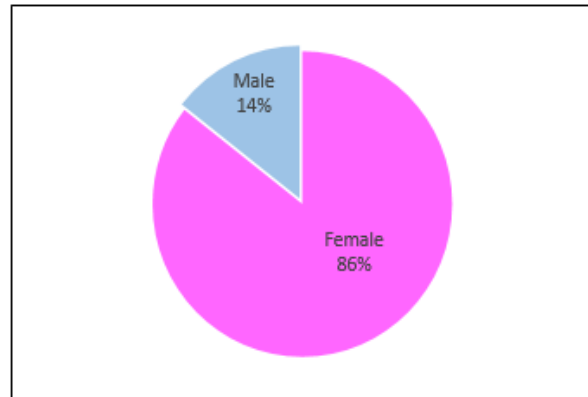
B. Statistic of Participants

A total of 201 participants from 44 organization attended the forum. The following charts depict the following :-

- 1) Breakdown of companies according to sector (28 OGE companies , 16 Others)
- 2) Distribution of attendees according to gender (85% Female, 14% Male)



No of Companies/Organisation attending



Gender Distribution

C. Speakers/Moderators

Guest of Honor;

- YB Dato' Sri Hajah Nancy Binti Haji Shukri,
Minister in the Prime Minister's Department

The following are the speakers in order of appearance:

- 1) Hazli Sham Kassim, President MGA
- 2) Anne Abraham, CEO Lead Women
- 3) Puan Sri Maimon Arif Patail, Council Member, Federation of Malaysian Manufacturers
- 4) Rita Benoy, Strategic Advisor, Green and Smart
- 5) Raj Kumar, Director CNetG
- 6) Salma Al Hajeri, Director Reservoir Engineering, Mubadala Petroleum
- 7) Ilham Fadhilah Sunhaji , VP PEMANDU
- 8) Datuk Iain Lo, Chairman, Shell Malaysia
- 9) Emeliana Rice-Oxley, VP Exploration PETRONAS
- 10) Ir. Hj. Kamaliah binti Abdul Kadir, SGM(Customer Service), Distribution Division, TNB
- 11) Johan Mahmood Merican, Deputy Director General (Human Capital), EPU
- 12) Dato' Sri Idris Jala, CEO PEMANDU Associate

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D. Issues Raised

- The importance of diversity in our workforce and in our Boardrooms as Malaysia heads towards achieving the nation's aspiration of becoming a high income, inclusive economy by 2020. How do we ensure that our institutions, systems and policies are able to empower our talent upwards?
- Why gender diversity is important? And what seems to be holding back the adoption of gender diversity?
- Women are not a niche demographic, them being a 50% + of the world population, but why women are under-represented at every level of the corporate pipeline, not only in Malaysia, but worldwide?
- The importance of 'Gender Diversity at workplace' is one of the issues that are often spoken about in conferences, reiterated in survey findings, and yet seldom are a priority. It appears that unless there is a mandatory obligation for companies to comply with, targets and timelines will not matter. To what extent do we need to push policy? What else needs to be done?
- Despite clear evidence that gender diversity brings value, tangible and intangible, we always end up with the question of merit. This is used as the barrier to placing women in C-suite and board positions. How do we bring the discussion to the next level especially in male dominated industries like the Energy Sector?
- Certain industries are being more male dominated and as such the culture is not supportive for women to thrive. But even in the Technology companies such as Google, that are known to promote employee friendly culture, diversity remains an issue. What then impedes gender parity at workplaces?
- What are some of the personal struggles faced by the speakers in trying to work their way up the leadership ladder in the Energy sector, which is a very masculine industry?
- Based on statistic, there is a global challenge to build the senior woman leader pipeline within organisations as women drop off at the most critical point in their careers. Many efforts are being put in place from policies to benefits to encourage women to stay or return to the workforce after their break, but it is not working. So even if we have quotas and targets, there will still be the problem of strong pipeline. What then is the real issue?
- How shall the Government and businesses, form a partnership to create an enabling ecosystem for women who choose to work, or choose to return to work after a long break and contribute directly through their skills and talent for the growth of the nation ?

E. Summary of Recommendations

- Policy is necessary, however beyond policy and the necessary mandatory quota, women need SUPPORT above all else.
- Leaders need to help the organization to understand, appreciate and value women more. Men need to be involved in discussion about diversity. It is also a necessary to have lots of conversations on unconscious biasness across the organization.
- Support from the head of the company, MD, CEO and etc to provide flexibility in work arrangements and to promote greater diversity in women leadership.
- Women needs to take initiative, be bold and courageous because they are the key thinkers and innovators to realise Malaysia's vision to be a high-income nation by 2020. In fact study confirms that firms with women in top management roles experienced an increase in "innovation intensity".
- Promoting diversity needs a champion and a change of mindset. We need more compelling stories of women in the BOD position. Ladies in the higher ranking position need to give full commitment and pull other ladies into the boards too!
- Government and businesses need to form a strong partnership to create an enabling ecosystem to support women who choose to work, or choose to return to work after a long break. One of the enablers that seem to work well is to allow greater flexibility in work arrangements and provide childcare support for men both men and women.
- Government as well as Corporations also need to address the female talent gaps and high turnover rates in the Energy sector. They must build a pipeline of female talent coming into the organization and accelerate their placement at the management level and at the board level.
- Business leaders must be brave to break the norm and extend the space for women leaders to be in key decision making position. They must be 'brave' to recruit, coach and retain young female talent and future generation.
- Last but not least, husbands need to be an equal partner to their wives and share the burden of child rearing and household chores - this is apparently one of the most important support required by working women !

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F. Appendix

Program Agenda

TIME	TOPICS	SPEAKERS
9.00 a.m.	Welcome Remarks	Hazli Sham Kassim President of MGA
9.15 a.m.	Keynote Address	YB Dato' Sri Hajah Nancy Binti Haji Shukri Minister, Prime Minister's Department
9.45 a.m.	<u>Presentation 1</u> Merit vs Diversity	Anne Abraham CEO of Lead Women
10.00 a.m.	<u>Panel Session 1</u> "Policy vs Culture: what does it take to elevate more women leaders?"	<p><u>Moderator</u> Anne Abraham CEO of Lead Women</p> <p><u>Panelist</u></p> <ul style="list-style-type: none"> ▪ Puan Sri Maimon Arif Patail Council Member, Federation of Malaysian Manufacturers ▪ Rita Benoy Strategic Advisor, Green & Smart ▪ Raj Kumar Director , CnetG Asia ▪ Salma Al Hajeri Director Reservoir Engineering, Mubadala Petroleum
10.45 a.m.	COFFEE BREAK	At TenOnCall, Level 4
11.00 a.m.	<u>Presentation 2</u> Women Leaders in Energy	Ilham Fadilah Sunhaji Vice President, PEMANDU Associates
11.15 a.m.	<u>Panel Session 2</u> "What more can the energy sector do to promote Diversity & Inclusiveness?"	<p><u>Moderator</u> Ilham Fadilah Sunhaji Vice President, PEMANDU Associates</p> <p><u>Panelist</u></p> <ul style="list-style-type: none"> ▪ Datuk Iain Lo Chairman, Shell Malaysia ▪ Emeliana Rice-Oxley Vice President Exploration, PETRONAS ▪ Ir. Hjh. Kamaliah Abdul Kadir SGM (Customer Service), Distribution Division, TNB
12.00 p.m.	<u>Presentation 3</u> Business Case for Human Capital: Investing in Women Leaders	Johan Mahmood Merican Deputy Director General (Human Capital) , Economic Planning Unit
12.30 pm	Closing Address	Dato' Sri Idris Jala CEO, PEMANDU Associates
1.00 pm	Lunch	At TenOnCall, Level 4
2.00 pm	Forum Ends	Delegates welcome to visit OGA2017 exhibition on Level 1

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Presentation 1 : Merit vs Diversity

Speaker : Anne Abraham, CEO of Lead Women

Summary of Session

As the first presentation of the day, and to ensure that everyone has the same understanding, the speaker deliberated on the subject of **'Merits vs Diversity'** at quite length. These are but few of the concepts that are quite misinterpreted when it comes to women recruitment in leadership and board representation. The speaker started off by prompting whether "Merit and Diversity are mutually exclusive"? She then proceeded to deliberate the concept of merit, diversity and why diversity matters even more now? She ended her presentation by emphasizing that diversity is a form of merit and that they are not mutually exclusive!

Key Messages/lessons Learned

- Recruitment without gender quota is meritocratic. Therefore, we should recruit on the basis of merit, not gender since there is clear objective definition of meritocracy in leadership and board representation.
- Token representation is perceived as negative i.e someone who is appointed to a certain position not for his/her skills but as a token representative to appease niche demographics. Be there because you deserve to be there, with merit.
- There is no objective measure of merit – Merit means you're good, be worthy of. On-merits means you're judging based on what you notice, instead of what you know – thus, based on the status quo
- Diversity – a form of merit. Concept of diversity encompasses acceptance and respect. It means understanding that each individual is unique, and recognizing our individual differences. These can be along the dimensions of race, ethnicity, gender, sexual orientation, socio-economic status, age, physical abilities, religious beliefs, political beliefs, or other ideologies.
- New research at Harvard reveals that people are aware of the extent that their ingrained biases have supported inaccurate perceptions about women and the unfair practices that those biases produce.
- We need to de-bias organizational practices and procedures. Mindset shift will follow suit.
- **Diversity Drives Innovation** - An analysis of the S&P Composite 1500 found that firms with women in top management roles experienced an increase in "innovation intensity" and were worth, on average, about US\$40m more than companies with only male leaders
- Diversity = Merit. They are not mutually exclusive!

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Panel Session 1 : “Policy Vs Culture : what does it take to elevate more women leaders? “

Moderator : Anne Abraham, CEO Lead Women

Panelists :

- 1) Raj Kumar, Director, CnetG Asia
- 2) Rita Benoy, Strategic Advisor, Green & Smart
- 3) Puan Sri Maimon Arif Patail, Council Member, Federation of Malaysian Manufacturers
- 4) Salma Al Hajer , Director Reservoir Engineering, Mubadala Petroleum

Summary of Session

The session was moderated by Anne Abraham and participated by 4 panelists from diverse work background, age, gender, race and nationality. The discussion revolved around the issues that are holding back the adoption of gender diversity practices at the workplace. Despite initiatives done by government to support women empowerment, progress in this area has been slow. The panelists shared their experiences and some of their personal struggles as they worked their way up the leadership ladder. They also discussed how policy, quota, and enabling ecosystems have helped to thrive the women in their respective organisations.

Key Messages/lessons Learned

Raj Kumar

- Supports the empowerment and enabling of talent. Diversity should be driven by business case. However, to encourage diversity, we need to stop compartmentalizing things
- He emphasized on the need for ‘equal brights, not just equal rights’. Women needs to take charge when given the opportunity. He supported constant discussion on unconscious biases and reword of job description
- Diversity should be used as a whole strategy and the benefit is applied to both gender

Rita Benoy (RB)

- Used to work as an industry specialist in the palm oil sector holding an executive director position, however the board was male dominated.
- The voluntary approach of encouraging diversity by putting on quota has shown result recently where women in the board has increased from 2% to 14%. This means that mandatory quotas could actually works!
- To break the culture, men need to be involved in discussion about diversity. It is also a necessity to have lots of conversations on unconscious biasness.
- Jack Ma of the famed Ali Baba’s secret success is “women”.
- Hopeful for the future whereby innovation/technology will lessen the pressure on women to be on site.

Puan Sri Maimon Arif Patail

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- Out of the 2000+ Corporate Members in Federation of Malaysia Manufacturers only 200+ are headed by women
- Promoting diversity needs a champion and Malaysia needs a story that are very relevant to the country, not from other countries (from developed world)
- How to stop the norm of having the same board members who stays on and on, because they like each other.
- The following perception or norm need to be changed
 - Having the same board members who stays on and on because they like each other
 - That only accountants and lawyers are good board members candidates
 - Only women from finance and legal background is worthy of becoming board members
- How to change mindset/ establish new norms
 - Need more stories of women in the BOD position
 - Encourage critical thinking at school
 - Ladies in the higher ranking position needs to give full commitment and pull other ladies into the boards too!
 - Women need to understand how men uses the corridor powers

Salma Al Hajeri

- Was an Electrical Engineering graduate that was put into a Reservoir Engineering position. Became one of the best Reservoir Engineers in the UAE region after 10 years
- Gender diversity takes intentional leadership – to go back to the intent!
- Family-work balance and support from family are essential to pursue certain position or rank. There are cases of women having to sacrifice their position, leave work or deliver halfway to prioritise family
- Policy change such as increasing duration of maternity leave and allowing more flexibility to deliver the work (i.e working from home, advancement of technology) should be implemented.
- Support mandatory quota as it encourages acceleration. Nonetheless one needs to be the best, and double the effort to get to the top. And be there because one deserves it.

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Presentation 2 : Women Leaders in Energy	Speaker : Ilham Fadilah Sunhaji, Vice President, PEMANDU Associates
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Summary of Session

As the topic implies, this presentation highlighted the statistic of women holding decision making positions in the Public Listed Companies (PLC), in the Oil, Gas and Energy sectors (OGE), and in the government sectors. The speaker emphasized the critical need for more women leaders in OGE to drive market liberation. She ended up her speech by challenging companies in private and public sectors to increase women leadership to more than **30% by 2020**.

Key Messages/lessons Learned

- In the Top 100 PLCs, despite higher number of women in management committee, the figure is not reflected at the top. Only 3 % holds position as Chairpersons of the company, while 17.7% are elected as members of the Boards
- This trends applies in the Oil, Gas and Energy (OGE) related PLCs where women participation as Chairperson is only 2%, 14.5% in Board of Directors, 2% as CEO/Managing Directors, and 24.6% as Management Committees
- In the Oil, Gas and Energy Sector, small number of companies have more than 30% women in the board & ~12 companies have none at all. Top 5 companies with more than 30% women on board are :-
 - PETRONAS Gas Berhad (40.2%)
 - Tenaga Nasional Berhad (40%)
 - Dialog Group Berhad (37.5%)
 - PETRON Malaysia Refining & Marketing Berhad (37.5%)
 - Malaysia Marine and Heavy Engineering Berhad (30%)
- 12 out of 50 companies have no woman on board. They are
 - UMW Oil and Gas
 - Daya Materials Berhad
 - Mega First Corporation Behrad
 - Silk Holdings Berhad
 - Wah Seong Corporation Berhad
 - Tas Offshore Berhad
 - Cliq Energy Berhad
 - Raya Materials Berhad
 - Petrol One Resources Berhad
 - Handal Resources Berhad
 - Boustead Heavy Industries Corporation
 - E.A Technique (M) Berhad
- The rest of the OGE companies are catching up...
 - 11 companies with 20 – 30% women on board
 - 20 companies with 10 – 20% women on board
 - 2 companies with 1 – 10% women on board
- In the public sectors, females Ministers are only ~9% of the total 34 Ministers in the Cabinet. While females Deputy Ministers are only ~18% of the total 34 Deputy Ministers in the Ministries

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- Female MPs are only ~**11%** of the total of 222 MPs in the *Dewan Rakyat*, while female Senators are only ~**21%** of the total of 63 Senators in the *Dewan Negara*
- Female KSUs are only ~**11%** of the total of 28 KSUs in the Federal Ministries , while female TKSUs are ~**25%** of the total of 59 TKSUs in the Federal Ministries
- As for the OGE Sector, female leadership has been critical in driving policy change especially in Energy Market Liberalisation
- All over the world, there are various key personnel in the Energy Sectors at the ministerial and C-suite levels such as :-
 - Brigitte Zypries, Federal Minister of Economic Affairs and Energy, Government of Germany
 - Mmamoloko Kubayi , Minister of Energy, Republic of South Africa
 - Isabelle Kocher, Chief Executive Officer, ENGIE Group
 - Jannicke Nilsson , Chief Operating Officer, Statoil ASA
 - Temenuzhka Petkova, Minister of Energy, Republic of Bulgaria
 - Dato' Raiha Azni Abd Rahman, Senior Vice President, PETRONAS
 - Vicki A. Hollub, Chief Executive Officer, Occidental Petroleum Corporation
 - Catherine MacGregor , President – Drilling Group, Schlumberger Limited

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Panel Session 2 : What more can the energy sector do to promote Diversity & Inclusiveness?"	Moderator : Ilham Fadilah Sunhaji, Vice President, PEMANDU Associates
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Panelists :

- 1) Datuk Iain Lo, Chairman, Shell Malaysia
- 2) Emeliana Rice-Oxley, Vice President Exploration, PETRONAS
- 3) Ir. Hjh. Kamaliah Abdul Kadir, SGM (Customer Service), Distribution Division, TNB

Summary of Session

The session was moderated by Ilham Fadillah Sunhaji and were participated by 3 panelists from the Oil, Gas and Energy Sector. The discussion started with the panelists sharing policies and practices that are adopted by respective organisations to promote diversity and inclusiveness. The panellists then moved on to share their opinion and observation on what else the organisation could do to support women escalating to top management positions – this includes strong support system and appreciation & recognition from leaders

Key Messages/lessons Learned

Datuk Ian LO (Shell)

- For over 10 years, diversity has been discussed and enforced in Shell.
- There are many policies that encourage women participation in the workplace from Career breaks, Working from home, part time working, flexible working hours, flexible working arrangement – but not sure which one works best.
- Policy is ONLY the beginning. It's the leaders who need to play the role to help the organization to understand, appreciate and value women. There were cases that women on 3 months maternity leave were hindered to get good merits compared to men working for the whole year – this is a Big NO-NO!

Emeliana Oxley-Rice (PETRONAS)

- Women is like Oxygen, the higher you go, the number is less
- Number of women is lowest in O&G compared to other sectors. Percentage of women dropping out is higher as they progress higher in their career. The phenomena is multifactor related
- PETRONAS' business ethics encourages diversity that creates safe and trusting environment
- Policy is necessary, as that is the foundation to encourage more women to participate in taking up projects. There's no one policy that is more helpful than the other but they are all necessary.
- Beyond the policy, women need SUPPORT! Support means men who want to take a chance on the women to take up a certain role. Based on an internal survey, there were women who are willing to make less salary to get those chances.

Ir. Hjh. Kamaliah Abdul Kadir (TNB)

- 40% ladies are in management team at TNB. This is a positive trend.
- Culture-wise, there is no fear of discrimination. The anecdote is "Anyone can be anybody". A person can enter TNB as anything, but goes out with what you want to achieve. There were cases of a graduate of Civil Eng who ends as VP of HR
- Work with the talent given and leverage on what you actually are. Women who does not play golf can equally mingle with men bosses at other topics like cooking!

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- Female engineers have special advantages. Women tend to be more focused and has excellent time management as they have to juggle household and office works simultaneously. They are also very detail in what they do, and being detail helps a lot. Women need other women to operationalize the details that they've set.

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Presentation 3 : Business Case for Human Capital: Investing in Women Leaders

Speaker : Johan Mahmood Merican , Deputy Director General (Human Capital) , Economic Planning Unit

Summary of Session

The speaker shared the initiatives taken by government to increase women's participation in the workforce and continuous upskilling of women talent. Despite the efforts, Malaysia has yet to achieve the targets of achieving 30% women on boards by 2016. Based on current projections, the target will only be met by 2035.

Key Messages/lessons Learned

- Gender Diversity Agenda started in the 10th Malaysia Plan and continued in the 11th Malaysian Plan.
- With all the targets set, women play an important role in the workforce, however the statistics shows otherwise
 - 54% in 2016 female labour force participation compared to 46% in 2009
 - 26% in Top Management of Private Sector
 - 29% in Senior Management of Private Sector
 - 17.7% on Boards of Top 100 Listed Companies on Bursa
 - Only 3 women Ministers (8.8%) and 6 Dep. Ministers (17.6%)
- The human capital development initiatives to increase participation of women in workforce are based on three main principles
 - Retain (Flexible Work Arrangements (FWA), Best Practice Sharing , Diversity Advocates, Advocacy e.g. conferences, awards, Tax Incentives for Implementing FWA)
 - Return (Flexi-jobs Listing on flexWorkLife.my, Tax Incentives for Hiring & Training Women on Career Breaks, Career Comeback, Networking Event, Childcare facilities)
 - Rise to the top (Diversity Disclosure, Women in Leadership Programme)
- The Government has set national targets in ensuring an increase in participation of women in workforce and continuous upskilling of women talent
 - Increase **women participation** in the labour market **to 59% by 2020**
 - Increase women in **decision making positions to 30% by 2016**
 - **Target childcare enrolment** (0-4 years) to increase from 4% to **25% by 2020**
- To-date, Women talent utilisation rate at decision making level in the Private Listed Companies LC stands at :-
 - **17.7%** female directorship in Top 100 PLCs*
 - **12.3%** female directorship in all PLCs*
 - **86** PLCs has more than 30% Women on Board*
 - **25.6%** of female in senior leadership (C-suite C minus 1)**
- In the government sector, the utilization rate of women talent are slightly better :-
 - **25%** of female Secretary General (KSU) in Ministries
 - **17.1%** of female Director Generals of Federal Departments***

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- **13.2%** of female Director General, Director and General Manager of Statutory Bodies
- **35.8%** of female in senior leadership (Jusa C and above)****

- We have already missed the 2016 target of 30% women on boards. And based on current projections, we will only met the target by 2035. This is due to :-
 - Voluntary target with no incentive / pressure to get companies to commit women on boards
 - 30% Club launched in May 2015 - only 66 PLCs committed to place more WOB
 - GLCs and GLICs – female top management are not placed on boards of non-competing companies
- Malaysia is making progress in improving female labour participation over the years especially post introduction of the NTP. Participation of women in the workforce is a key component in driving growth of the country
- Additional efforts were put in to encourage parents to enroll their children into registered childcare centers by driving setup of new childcare centers as well as registering unregistered centers
- To further improve quality of childcare service, all childcare minders are required to be trained under the PERMATA ECCE module
- In enhancing childcare support system to attract women to returning to work, incentives are provided for individuals and companies
 - Tax incentive for individuals
 - Tax incentive for Childcare centers
 - Tax Incentives for Employers
- These incentives have attracted companies to setup childcare center at workplace to ease burden of childcare of female employees i.e CIMB (Krista Childcare Centre), Securities Commission (TASSEK Childcare Centre), Maybank Tiger Cubs Childcare Centre (MT3C)
- TalentCorp has also introduced flexWorkLife programme which encourage employers to allow employees to work on a flexible arrangement e.g time and location
- The Government is currently reviewing the *Garis Panduan Penubuhan Tadika dan Taska 2012* to improve ease of setting up childcare centers on higher level i.e. level 3 and above.

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Presentation 4 : Women Driving the Economic Growth of the Oil & Gas, and Energy Market

Speaker : Dato' Sri Idris Jala, CEO, PEMANDU Associates

Summary of Session

The speaker highlighted the efforts carried out by government under the National Transformation Program (NTP) which was carried out via collaboration between Ministries and Agencies with PEMANDU. Since its launch in 2009, NTP which was aimed at improving Quality of Life have achieved significant achievements. The Oil, Gas and Energy sector continues to thrive amidst government's efforts to diversify economy and reduce dependency in oil revenue. The speaker called for more women leaders' contribution in driving economic growth of the Oil, Gas & Energy market

Key Messages/lessons Learned

- The Government began delivering Transformational work through collaboration between Ministries and Agencies with PEMANDU
- The National Transformation Programme aims to improve Quality of Life and the goal is anchored to three main pillars
 - HIGH INCOME - Target US\$15,000 GNI per capita by 2020
 - INCLUSIVENESS - Enables all communities to benefit from wealth of the country
 - SUSTAINABILITY - Meets present needs without compromising future generation
- Since the launch of NTP in 2009, Malaysia's GDP hit the MYR1 trillion mark for the first time in 2015 and recorded MYR1.2 trillion in 2016
- Malaysia's GNI (Gross National Income) is closing on to the high-income threshold – its gap shrunk from 33% in 2010 to 18% in 2016
- CAGR (Compound annual growth rate) for investment grew from 5.5% in the 2006 – 2010 period to 10.3% in the 2010 – 2016 period, led by the private sector
- Since the introduction of NTP, Government has successfully diversified our economy resulting in less dependency on oil revenue
- However, Oil, Gas & Energy sectors continue to contribute ~15% of GNI value to Malaysia
- Malaysia's Oil, Gas & Energy industry is going through a period of adjusting to the "New Norms"
 - **"Supply glut"** has led to downward pressure on global oil and gas prices
 - More opportunities to leverage on the **excess supply of gas** in the region
 - Movement on **"green growth"**, and the efforts towards a much more efficient electricity sector
- Consistent with other developed countries, Malaysia is gradually raising our fuel standards
- The demand for higher fuel standards will be partially met by the upcoming Pengerang Integrated Complex
- New regulatory framework and the transition towards market-driven pricing environment will enable Third Parties Access
- As of today, the infrastructure is ready for imported gas supply to enter Peninsular Malaysia gas market
 - Regasification Terminal (RGT) Sungai Udang, Melaka - In operation since 23rd May 2013
 - Regasification Terminal (RGT) Pengerang, Johor – expected to operate in Q4, 2017

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- We are diversifying our capacity mix for power generation by building-up our Renewable Energy capacity
- Renewable Energy is projected to grow and contribute ~30% to our national capacity mix in 2025
- At the same time, Malaysia Electricity Supply Industry (MESI) is undergoing progressive structural changes