

2020

GLF Thought Leadership

DRIVING GENDER DIVERSITY AND
INCLUSION IN THE TELECOMS INDUSTRY

June 2020

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The ITW Global Leaders' Forum (GLF) is a network of the leaders from the world's largest international carriers, who convene to discuss strategic issues and to agree collaborative activities with the aim of driving the next phase of growth for the industry.

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INTRODUCTION

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Verizon

Chair of the GLF Diversity, Inclusion and Belonging Working Group

Having joined the GLF in 2019, and having spoken to my predecessors from Verizon, it is clear to me the role that the GLF can play as a 'voice' leading the global carrier industry. Collectively shining a light on key industry issues where we can drive common advocacy or action can only be a force for good. As such, I believe the GLF has a critical role to play in improving diversity, inclusion and belonging within the telecoms industry – it is an issue that we all face and are all on a journey to improve the standing within our organisations.

As we launched the Diversity, Inclusion and Belonging Working Group, we agreed that whilst there are many areas (such as age, race and ability) that fall under this remit, a first area of focus should be how we can leverage the collective 'voice' of the GLF to drive improvements in gender diversity both within the organisations of members and more broadly across the industry. Ensuring gender diversity is incredibly beneficial – I have seen this first-hand in my organisation – but there is still more that needs to be done to address the gender gap as we attract and retain female talent. I am well aware of the increasing efforts made, both within my organisation and in that of my peers, to improve gender diversity and I am enthused by the commitment of the GLF to treat this as a priority.

This report has been produced to drive awareness, 'start the conversation' and shape our thinking as we align ourselves behind the role the GLF can take going forward. I would like to thank my colleagues that have participated in the survey and interviews that formed such key inputs to this study. All data contributed by GLF organisations in this report has been done so anonymously as it is our purpose to build an industry-level picture rather than 'score' companies, but I do hope it helps each member privately benchmark their own progress and see what we can learn from each other. To that extent, we include several case studies from GLF member companies and those outside the telecoms industry that could be good examples.

I look forward to working with all GLF members to make a positive impact to gender diversity.

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EXECUTIVE SUMMARY

1. Gender diversity and inclusion are still not equitable in the workplace, with the gap becoming more pronounced in senior levels of organisations. Globally, the gender representation gap is a century away from being closed, as currently only 55% of women are engaged in the labour market.
2. Gender diversity makes business sense with clear rationale to leverage the potential of the full workforce and reflect diversity in the customer base. 85 % of GLF companies agree that improving gender diversity has a positive commercial impact.
3. There is limited female representation within the boards and management teams of telecoms organisations, especially within technical roles. GLF members attribute success in improving gender diversity to it being embedded in their organisational culture and company DNA – having active CEO sponsorship and participation is critical.
4. Initiatives to promote gender diversity can be clustered in three stages: acquisition, retention and return. Over 60% of surveyed organisations have initiatives in place for one or more of gender diverse hiring, mentoring and return to work. Implementation of gender diversity policies is not seen as conflicting with commercial performance.
5. Telecoms carriers can look to other industries, such as technology and financial services, where many initiatives across acquisition, retention and return have been undertaken. In several cases there has been clear demonstrable impact.
6. GLF members acknowledge their role to 'lead from the front' on gender diversity both as executives in their organisations and through the GLF as a whole.
7. Given the uniform importance, the GLF can use its 'voice' as a leadership body for the international carrier industry to deliver a common message and guidelines for companies to consider, but cultural differences across regions support local adaptation of implementing gender diversity programmes.
8. To attract talent, undertaking high-school and university activities, providing paid internships and training programs for entry level positions would help. GLF members recognise that this is an industry-wide, not company-specific, challenge, opening the opportunity for collaboration.
9. To retain talent, programmes covering mentorship, sponsorship, workshops and role modelling are among the most highlighted requirements by interviewed GLF members. They call for sharing of best practices and creating connections between their organisations.
10. GLF members are open to benchmarking the status and impact of gender diversity initiatives in their organisation as a mechanism to ensure that they continue to understand the speed of their progression in line with their peers.

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PART 1

THE GENDER GAP



1

Gender diversity and inclusion are still not equitable in the workplace, with the gap becoming more pronounced in senior levels of organisations. Globally, the gender representation gap is a century away from being closed, as currently only 55% of women are engaged in the labour market.

2

Gender diversity makes business sense with clear rationale to leverage the potential of the full workforce and reflect diversity in the customer base. 85 % of GLF companies agree that improving gender diversity has a positive commercial impact.

3

There is limited female representation within the boards and management teams of telecoms organisations, especially within technical roles. GLF members attribute success in improving gender diversity to it being embedded in their organisational culture and company DNA - having active CEO sponsorship and participation is critical.

1. FRAMING THE 'BIG PICTURE'

- a. Gender diversity and inclusion is still not equitable in terms of representation or pay in the workplace, but reaching equality is seen as a priority. 80% of GLF organisations recognise gender diversity as a priority for their company.
- b. The gender gap has both demographic and economic components; global society is a century away¹ from achieving gender equality and women still earn less than men even with the same working conditions.
- c. As we look at senior levels within organisations, the gender gap increases. 95% of GLF organisations surveyed say women represent fewer than 50% of the direct reports to the CEO.

Diversity and inclusion – what do we mean?

Diversity encompasses many visible and invisible demographic human traits such as age, race, gender identity and sexual orientation. It is these traits that can determine how we approach problems and derive solutions differently based on our demography, background and experience.

Inclusion is the combination of action and feeling; at an individual level inclusion is felt after someone's needs are addressed and they feel more comfortable in an organisation. At an organisation level, inclusion can mean fair representation of diverse people across all departments, or inclusive policies such as fair compensation and flexible working, or anti-discrimination codes of conducts.

With regards to gender, there are two key axes for diversity and inclusion – representation and equity of pay. Currently for female participation in the workforce there is both a lack of representation in the workforce and equity of pay. The GLF recognises the importance of improving gender diversity and inclusion in both their own organisations and the telecoms industry as a whole and would like to understand what can be done to accelerate progress.

For this report, a survey has been conducted to frame the current situation within GLF organisations. When members were asked about their beliefs on gender equality within their organisation, 85% confirmed their organisation's full alignment with

being equal opportunity employers with regards to gender and 80% stated that gender diversity is a company priority. However, looking beyond these statements and across the broader industry, it is evident that whilst the journey towards true gender equality is underway, further steps need to be taken.

Sizing the gender gap – both in representation and pay

The Global World Economic Forum has spent more than a decade defining and measuring indicators that can dimension the gender gap. Since 2006 and through multiple sub-indexes that take into consideration aspects such as economy, education, health and politics, they have developed a Gender Gap Index, that recently positioned our global society to be a century away from achieving gender equality for representation in the workforce. Under this index, global gender equality stands at a 69% as only 55% of women (aged 15-64 years) are engaged in the labour market as opposed to 78% of men¹¹.

When looking at the progress over the last years by region, the highest is from Western Europe (77%), followed by North America (73%), Latin America and the Caribbean (72%), Eastern Europe and Central Asia (71%), Sub-Saharan Africa (68%), South Asia (66%) and the Middle East and North Africa (61%)¹.

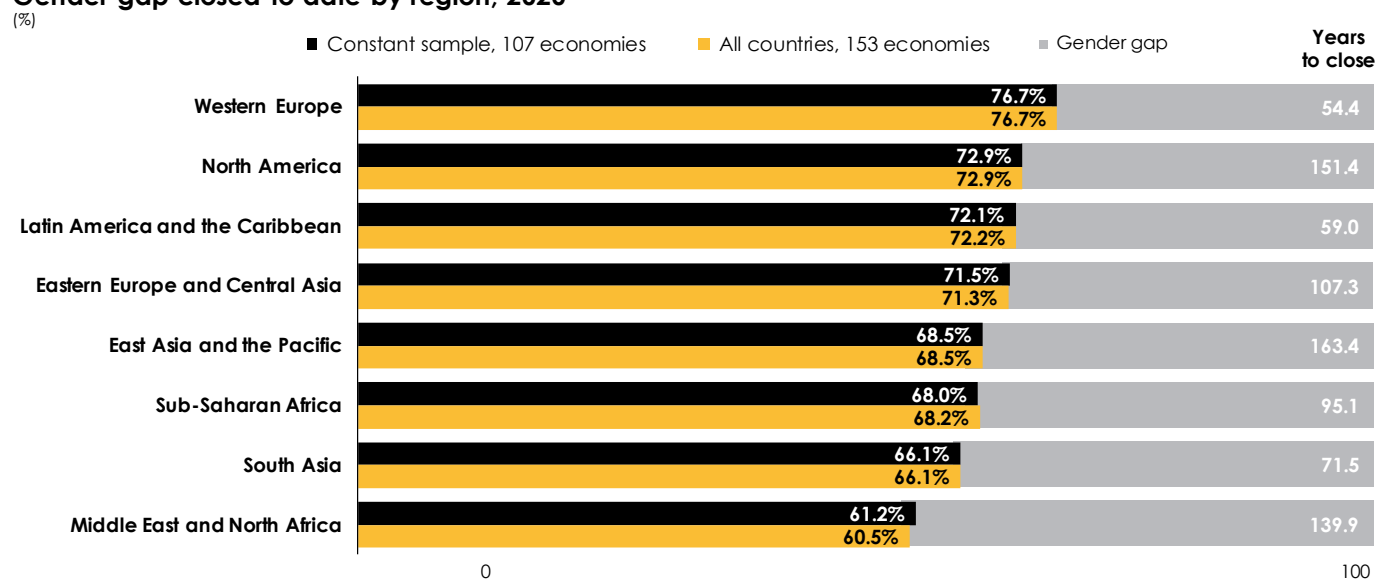
¹⁰ World Economic Forum, Gender Gap Index

¹¹ Global Gender Gap Report 2020 by World Economic Forum

PART 1: THE GENDER GAP

Exhibit 1: Gender gap for workforce representation closed to date by region, 2020¹

Gender gap closed to date by region, 2020



Notes: Population weighted averages, including the 153 economies featured in the Global Gender Gap Index 2020 and the 107 economies featured throughout all 2006-2020 edition of the Index. Source: Global Gender Gap report 2020

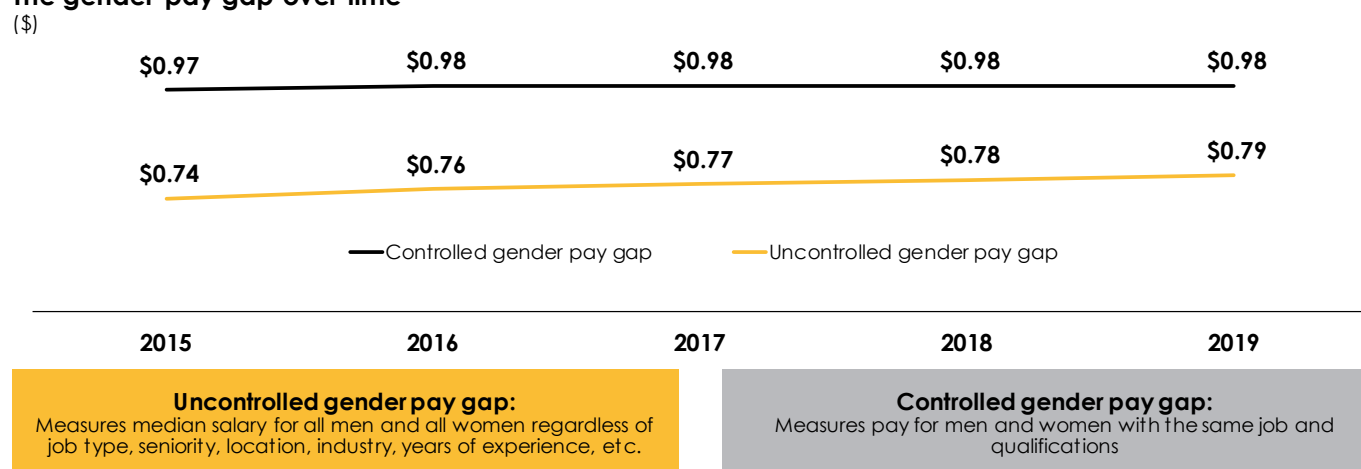
Gender-based inequality doesn't end simply at overall female representation level in the workforce. It extends to remuneration, where there are two issues: the pay gap and pay equity.

A gender pay gap currently exists as, on average, women earn 79 cents for every dollar earned by

a man, however this figure can be influenced by the lack of female representation at senior levels of companies. Beyond the pay gap, there are instances where even under the same working environment, employment characteristics and conditions in the workplace, women earn two percent less than men¹².

Exhibit 2: The gender pay gap over time³

The gender pay gap over time



Source: <https://www.payscale.com/data/gender-pay-gap>

¹²Pay scale analysis: <https://www.payscale.com/data/gender-pay-gap>

Gender representation equality – an increasing challenge with seniority

The representation 'gender gap' increases in line with seniority. Analysis by the World Economic Forum, shown in Exhibit 3, demonstrates the reduced share of women holding roles as seniority increases. Taking a wider view, when looking at Fortune 500

companies, only 5% of CEO positions are held by women despite them accounting for 58% of the US workforce. This percentage holds on a broader base - according to the Wall Street Journal¹³ as of February 2020 women lead only 167 of the USA's top 3,000 companies. This figure has doubled in the past decade, but continues to demonstrate a significant lack of diversity.

Exhibit 3: World Economic Forum assessment of gender gap in female leadership¹⁴

The workplace seniority gap

(%)



* Based on the sample of countries where the Enterprise survey is conducted; ** Senior roles, are those who plan, direct, coordinate and evaluate the overall activities of enterprises, governments and other organizations, or of organizations, or of organizational units within them, and formulate and review their policies, laws, rules and regulations. Corresponds to ILO Major Group 1, (ISCO-08)

Within the GLF, of companies responding to the survey, 95% responded that less than 50% of their management team roles are held by women, whilst 60% reported to have less than 25%. The survey also supported the concept of the gender representation gap increasing with seniority with 75% companies reporting more than 25% of total roles held by women, compared to only 40% of companies having this same representation at management team. In discussion with GLF members, whilst there was no single identified cause for this lack of representation, issues such as lack of role

models for female colleagues to stay in the sector, the challenge of securing effective 'sponsorship' for female career progression and the historical lack of women entering the sector to promote were cited. As was stated by one GLF member: "The challenge exists at the middle level of the organisation where women tend to drop out [...] There is a perception that you need to be "tougher" than most to be successful as a senior woman in telco".

¹³ "Why So Few CEOs are Women" – Wall Street Journal, 6th Feb 2020

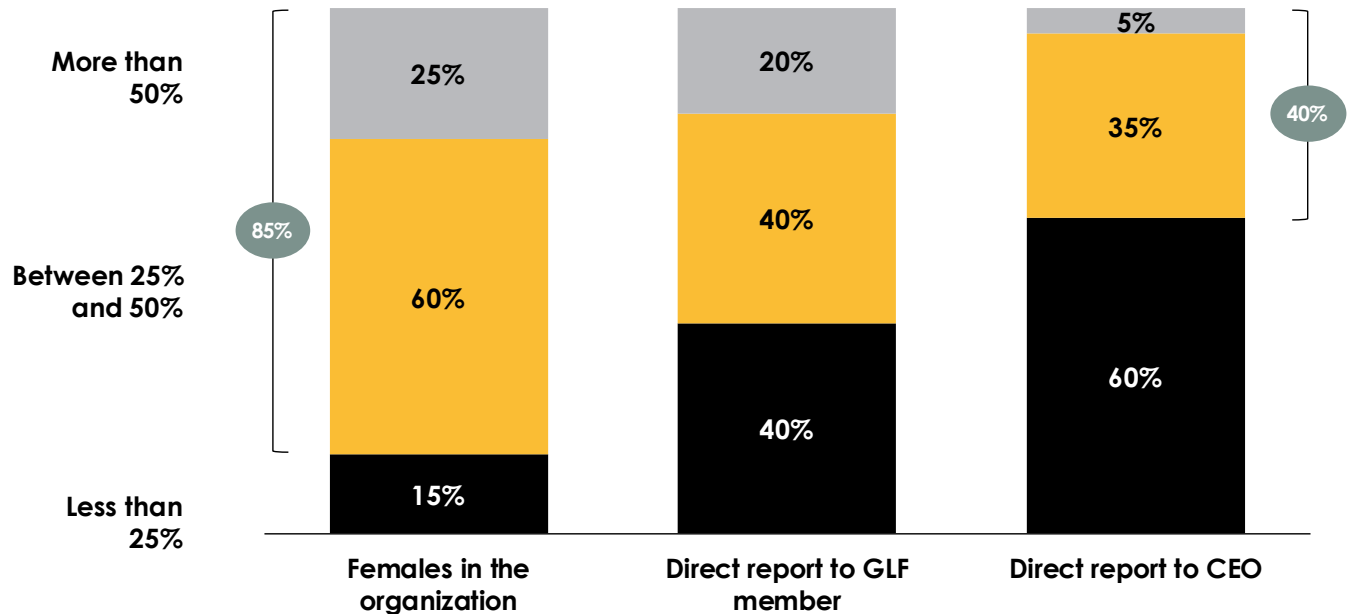
¹⁴ World Economic Forum website: <https://www.weforum.org/reports/gender-gap-2020-report-100-years-pay-equality/infographics#report-nav>

PART 1: THE GENDER GAP

Exhibit 4: GLF survey results on female representation evolution

How many females, direct report to you and direct report to CEO are there in your organisation?

(%)



Source: GLF Survey n = 20

Despite the unequal representation, GLF feedback suggested that they do not see significant barriers existing – when asked about potential barriers in their organisations to improving gender diversity 60% of companies said that they were not aware that further barriers exist. However, the data on female representation, particularly at a senior level, suggests that more could be done – if not by removing barriers then by ensuring proactive steps are taken.

2. WHY GENDER DIVERSITY AND INCLUSION MATTER

- a. Academic research suggests that having a more gender diverse organisation can lead to improved commercial performance; studies suggest that an increase of female representation can increase revenues up to 15%.
- b. Diversity creates a virtuous cycle: female talent attracts female talent; GLF members acknowledge the impact of having a gender diverse workforce to attract talent and reflect their customer base.

Gender diversity drives business performance

There is evidence from both academic study and reported performance that improving gender diversity, particularly at a senior level, can improve commercial performance.

A survey on firms from over 90 countries showed companies that went from 0% to 30% of female participation in their senior leadership, increased their revenues by 15%¹⁵. A study by Pipeline Equity based on over 4,000 companies across 29 countries identified that for every 10% increase in gender equity businesses see a 1-2% increase in revenue¹⁶. Other reports Beyond revenues, reports from MSCI¹⁵ on female representation in US companies, concluded with higher returns of equities on those firms that had at least three women on their Board of Directors. Furthermore, a report from Credit Suisse in 2016 concluded that businesses with higher numbers of women in management roles deliver higher return on equity (by 19%) and higher dividends (by 9%) than businesses with fewer women in management¹⁷.

GLF members views were in line with the academic research. The majority of GLF members within the survey recognised that improving gender equality has a direct commercial impact on their organisation's performance. In interview discussions, it was expanded on with feedback that:

- "Greater diversity leads to greater diversity of thought, faster and more efficient decision making and more innovation. There are also numerous studies that show the financial benefits to revenue and profitability to increasing gender balance [...] We are at the beginning of the change of tides, but in the future, talented people will seek out organisations that show their strength in these areas"
- "We have a fundamental belief that diversity is good for our business. The business case is having a workplace utilising all the talent that you have. It might be hard to have the right data to show causation, but the correlation data is overwhelming"
- "I believe that our performance would be improved with better gender balance and equality – external studies have shown that gender-balanced organisations – and particularly, women-led organisations have better financial performance, particularly in growth"
- "Studies have proven that gender diversity at board and SLT levels contributes 21% to the bottom line for the top quartile of companies - engaging this further to ethnic / cultural diversity rockets that figure to 33% and 43% respectively"
- "We are not shy to say that we are better commercially because we are diverse in gender"

¹⁵The gender gap in tech and how to fix it report, by WomenTechCouncil

¹⁶Equity for All, Pipeline Equity 2019

¹⁷"Higher Returns with Women in Decision-Making Positions", Credit Suisse, 3rd October 2016

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- “We look at customers in our markets and know we would be foolish not to have a diverse workforce – if we were not as diverse, we would not be as successful”.

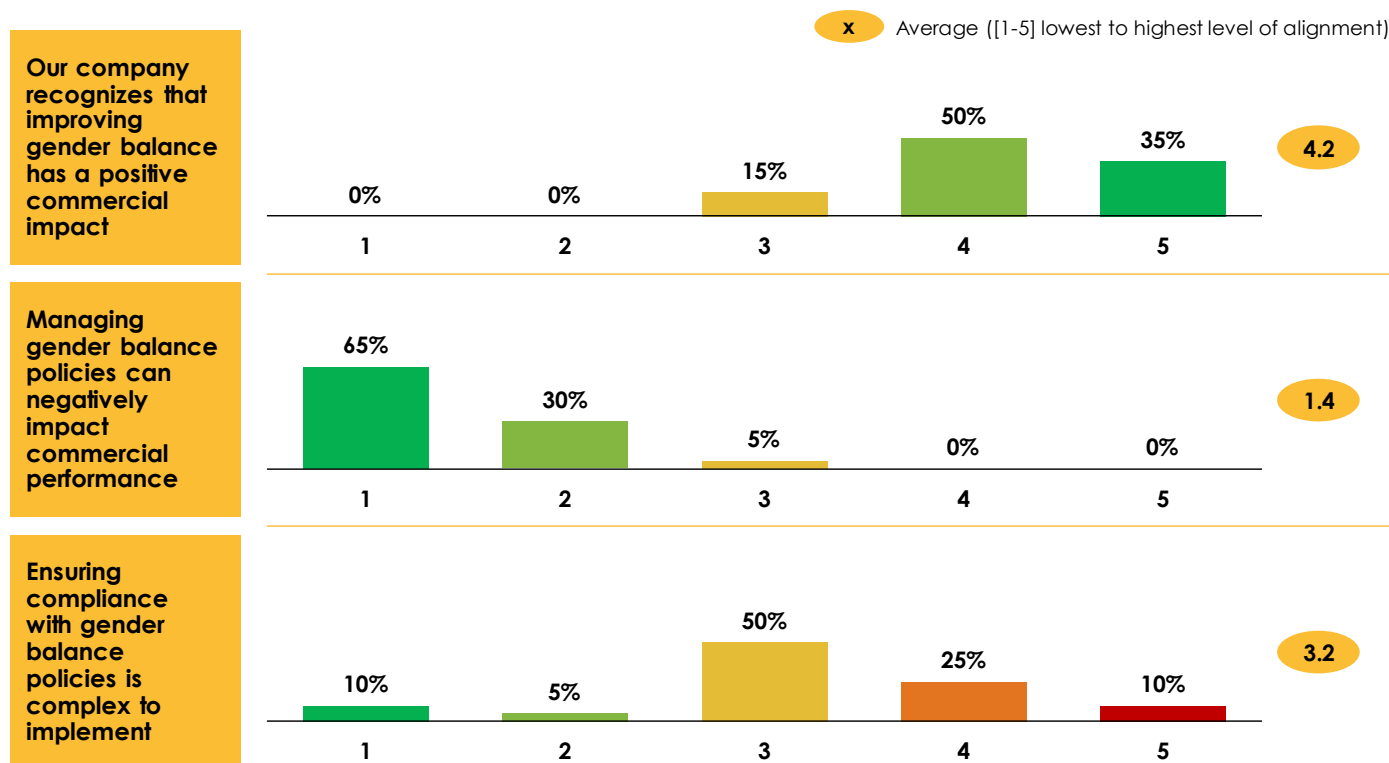
A virtuous cycle: a diverse workforce attracts further diversity

It was noted by some GLF members that having female representation in their leadership team helps attract female talent in more junior roles, especially STEM related roles. As one GLF member stated: “In our organisation, one importance of having women in our team is to avoid losing outstanding

female talent when the opportunity is presented, as sometimes, too masculine teams have led to losing brilliant women in the recruitment process”.

More significantly involving “the other half” of the workforce into an organisation can also drive innovation as a new perspective and line of thinking is put on the table, thriving the development and launch of new products for corporations that can then reach a broader customer base and indirectly increase their sales and customer attachment. It was stated by another GLF member, echoing the comments of several peers that: “Diversity in my organisation reflects the customers we serve; a range of thoughts, opinions, cultural understanding and cultivating a safe and inclusive environment”.

Exhibit 5: Perception of gender balance commercial impact and policy implementation by GLF organisations



Source: GLF Survey n = 20

Given 85% of surveyed GLF members recognise that improving gender balance has a positive commercial impact and disagree with the fact that gender balance policies can negatively impact commercial performance, the case for seeking gender diversity is clear. However, there is less alignment on the required actions and policies to deliver gender diversity. Over 85% of GLF organisations showed partial alignment to the statement that ‘ensuring compliance with gender balance policies is complex to implement’. If we

look at the 35% of companies that showed highest alignment with that statement only one third identified barriers within their organisation. Therefore, the root of the complexity to ensure delivery on the gender diversity ambition is still to be fully understood. In the words of one GLF organisation interviewed for this study which reflected the sentiment of many members: “we are still on the journey and there is a lot of work we have to do. We will always strive to make diversity and inclusion better.”

3. THE TELECOMS INDUSTRY – PLAYING CATCH-UP IN GENDER REPRESENTATION EQUALITY

- a. Within the telecoms industry, gender representation equality is higher in boards than management teams; the gender representation gap is highest in technical and commercial roles.
- b. GLF members attribute success of gender diversity in their organisations to be based on it being a cultural change with diversity embedded in the company DNA. Active participation and sponsorship from the CEO is critical.
- c. It is critical that gender diversity initiatives cover all areas of the organisation, and are tailored to the requirements that different roles and level of seniority.

Sizing the gender gap in telecommunications companies

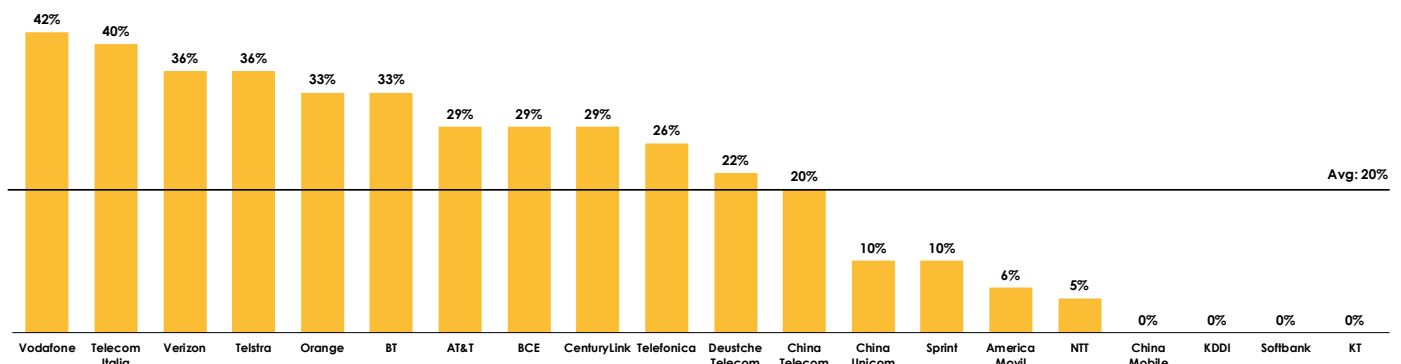
When assessing gender diversity within telecoms companies it is possible to split between the Board of Directors and Management teams.

In the case of Board of Directors there has been significant public focus on improving gender

diversity as one element of responsible governance. However, as shown in Exhibit 6 below, when analysing the leading 20 telecom companies in the world by revenues within the composition of their Board of Directors whilst half have female representation of more than 20% only two have representation equal or higher than 40%.

Exhibit 6: Percentage of female board members in 20 telecom companies

Female representation in #20 telecom Board of Directors (%)



Source: Operators website (February 2020), Delta Partners analysis

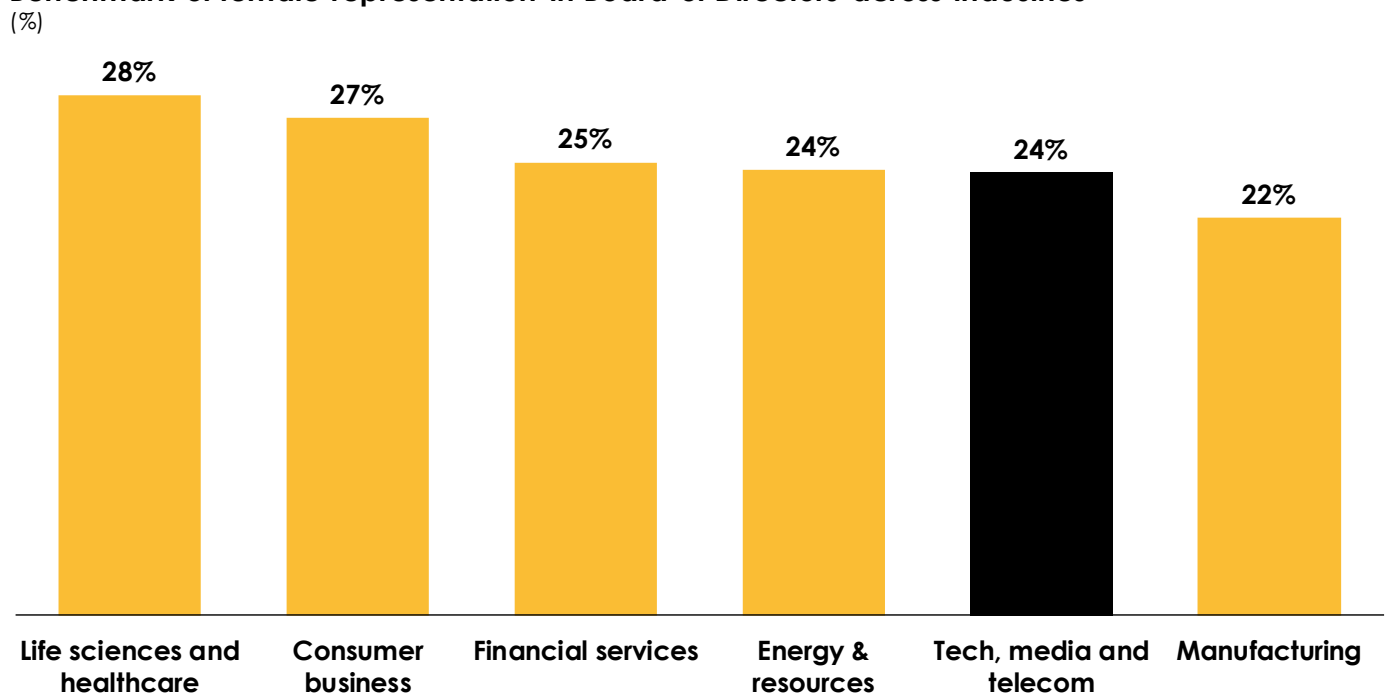
PART 1: THE GENDER GAP

Telecoms is not out of line with other sectors. Looking at a benchmark of six sectors including Life Sciences, Consumer Businesses, Financial Services, Energy, Manufacturing and 'Tech, Media and Telecoms', there is a spread of between 22% and 28% of board seats being held by women, with TMT at 24%. Expanding to a geographic view, within the Russell 3000 index companies, which

seeks to represent the entire US stock market, only 20% of board seats are held by women. This figure represents improvement from previous years with 64% of companies improving gender diversity of board representation. However, 41% of indexed companies currently have either one or no female representatives on their Board of Directors.

Exhibit 7: Benchmark of female representation in Board of Directors in different industries

Benchmark of female representation in Board of Directors across industries



Notes: Average of the following countries: US, Canada, France, Germany, Italy, Netherlands, Spain, Sweden, Switzerland and UK;
Source: Report from Deloitte (<https://www2.deloitte.com/content/dam/Deloitte/global/Documents/Risk/gx-risk-women-in-the-boardroom-sixth-edition.pdf>); Delta Partners analysis

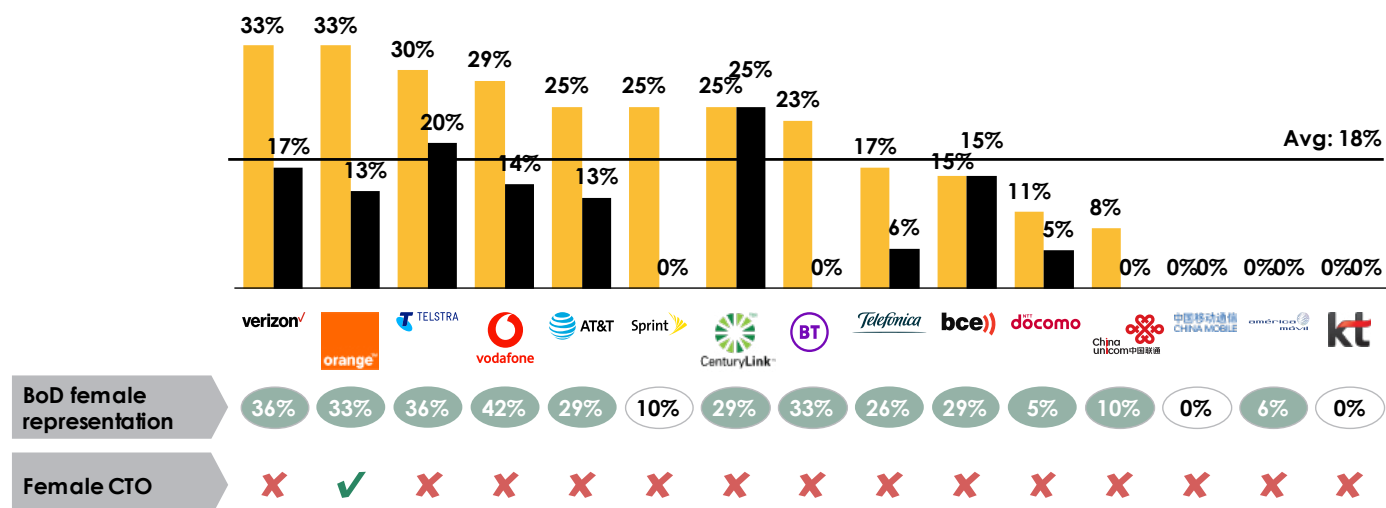
Looking at the Management teams of the same 20 telecoms companies' female representation is often lower than at board level. Further analysing the data on a role-by-role basis, it is evident that the gender representation gap increases when looking at only technical or commercial roles. Excluding corporate positions such as Human Resources and Corporate Social Responsibility average female representation on management teams reduces from 18% to 9%. Excluding those aforementioned roles, the highest female representation is 25% only. This is important – the path to CEO more often comes through a P&L responsible or Operations role. If women are under-represented in these management team roles the likelihood of improving gender balance at CEO level will be reduced.

GLF members taking part in this study shared their belief that initiatives to improve gender representation equity within management teams must come 'top-down', proposing that CEO sponsorship is key. In the case of Verizon, as one example, CEO Hans Vestberg's public support for gender diversity and inclusion initiatives is cited as one of the key success factors. Verizon is not alone - STC has launched a Women Council led by the Group CEO, whilst in Telstra the CEO leads a Diversity & Inclusion council with representation across all functions that meets on a quarterly basis. Several GLF members spoke clearly on the importance of senior leadership stating:

Exhibit 8: Percentage of women in leadership teams of 20 telecom companies¹⁸**Female representation in #20 telecom leadership**

(%)

■ All positions ■ Excludes non-technical roles¹ ● BoD representation equal or above leadership teams



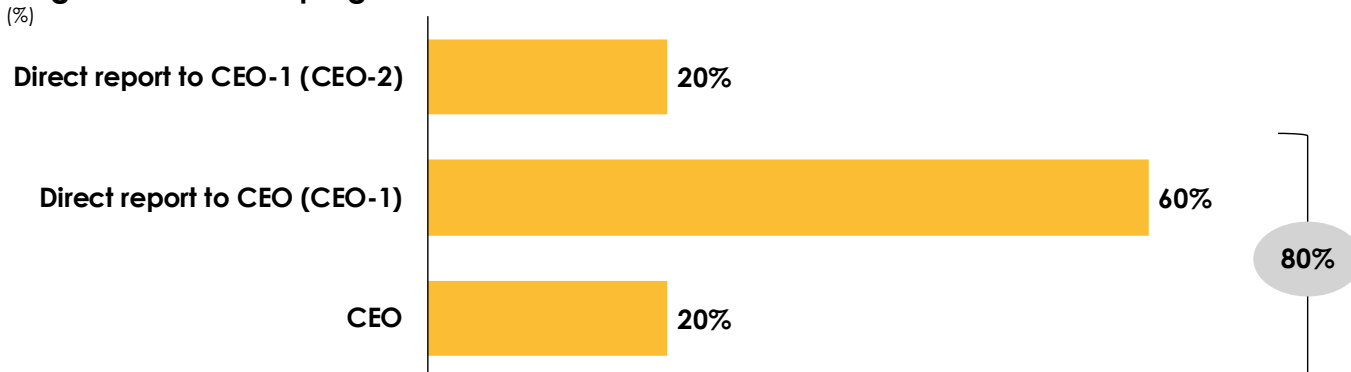
Notes: 1 Non-technical roles refer to STEM related positions such as CTO, CCO, CBO and others; Source: Operators website (February 2020), Delta Partners analysis

- “It has been taken seriously for a long time and at the top of mind for the CEO. It is deeply embedded in the leadership culture. Whenever senior leadership meet, we are encouraged to have relevant topics on D&I”
- “This clearly starts with the Board and CEO – it is about commitment and important, and then translating to more tangible action points”
- “CEO takes an active role ensuring efforts towards gender diversity”

Exhibit 9: Level of responsibility for gender balance programmes at GLF organisations

At what level is the most senior representative with overall direct organisational responsibility for gender balance programmes?

(%)



Source: GLF Survey n = 20

¹⁸Data collected and analysed in February 2020 from each company website

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The GLF survey showed that despite the importance attributed to CEO leadership, only 20% of organisations allocated direct organisational responsibility at this level.

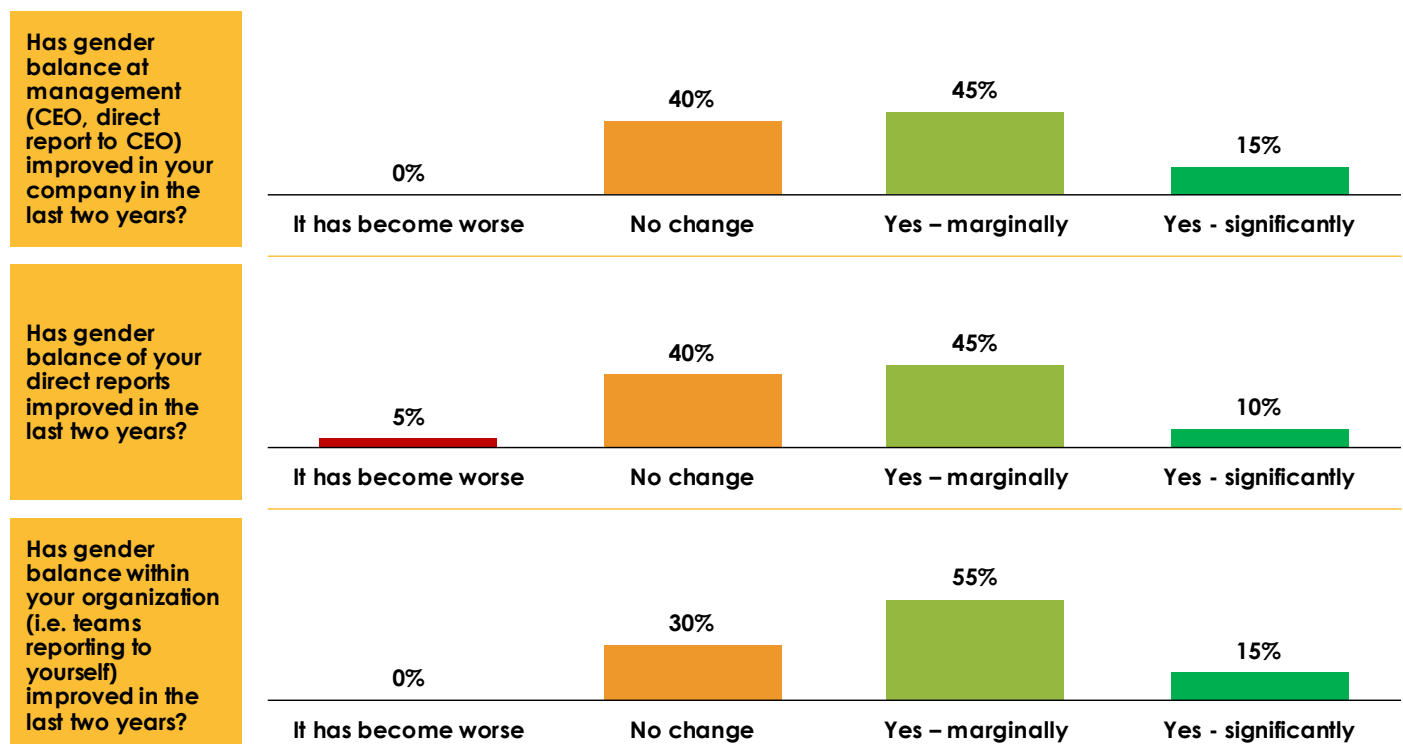
Several GLF companies explained how efforts on gender diversity are driven through inclusion in their company values. For example, Tata Communications includes 'Inclusiveness' as one of its five values, and in setting up Tofane, 'diversity' was included as one of four corporate values. Through inclusion as a company 'value' gender diversity and inclusion can be cascaded into initiatives and also company aspirations and targets. Across GLF companies there was no consistent approach to measuring and incentivising improvements in gender diversity. Some companies have no set aspiration or targets, some had principle targets that sought to serve as guide-posts and milestones on the journey to improve gender diversity, and others explained that a proportion of executives'

incentive-based remuneration was linked to reaching diversity targets.

Such variation in approach demonstrates the industry-wide context for gender diversity in the GLF members. It was highlighted as a uniformly important topic across the industry but given regional, cultural and organisational differences at a company level implementation of programmes is quite individual.

Despite senior leadership for gender balance initiatives, there is still room for improvement beyond current initiatives. 90% of GLF members responding to the survey admitted to having seen marginal to no increases in female direct reports in their organisations in recent years. However, change may be ahead. Most organisations that interviewed for this study have declared gender diversity as a company priority only in the past 6-18 months, making it a very nascent topic in some corporations with the benefits of activities still to be recognised.

Exhibit 10: Improvements identified in organisation by GLF members



Source: GLF Survey n = 20

Making relevant to all, but tailored to specific needs

It is critical to ensure that gender diversity initiatives are relevant to all parts of the organisation. Some GLF members noted how previous initiatives in their organisations had focussed primarily on administrative positions and not for the middle and senior management, or technical roles, where the needs were different. Where there has been success in structurally and culturally improving gender diversity GLF members spoke of how initiatives, policies or targets covered every function.

The lack of gender representation equity is most highly pronounced when looking at senior technical roles. When GLF members were asked about the number of women that hold technical position in their organisation compared to all roles there was significant reduction. As shown in Exhibit 11 below, in 70% of organisations less than 25% of technical roles are held by women, a significantly lower representation when compared to overall share of roles in the organisation held by women.

Exhibit 11: Technical functions held by women in GLF organisations

Within your organisation (i.e. teams reporting to yourself), what percentage of members are female? And technical functions?



Source: GLF Survey n = 20

PART 2

DELIVERING PROGRESS IN GENDER DIVERSITY AND INCLUSION



1

Initiatives to promote gender diversity can be clustered in three stages: acquisition, retention and return. Over 60% of surveyed organisations have initiatives in place for one or more of gender diverse hiring, mentoring and return to work. Implementation of gender diversity policies is not seen as conflicting with commercial performance.

2

Telecoms carriers can look to other industries, such as technology and financial services, where many initiatives across acquisition, retention and return have been undertaken. In several cases there has been clear demonstrable impact.

1. UNDERSTANDING GLF MEMBERS' GENDER DIVERSITY ACTIVITIES'

- a. Three stages are attributed to gender diversity activities: acquisition, retention and return. Most surveyed companies face biggest issues on acquisition and retention of mid-management positions and senior management.
- b. GLF companies have initiatives in place to address the gender representation gap in their organisations with most focused on the acquisition of talent and less in retention and return.

Organisations need to ensure that gender representation equality is met at all levels. The challenge can be split into three stages of the career:

- 1) Acquisition:** to attract talent to join the organisation.
- 2) Retention:** to keep talent within the organisation; applied in front of the possibility of drop offs.
- 3) Return:** to bring back talent that has previously left the organisation.

Acquisition

65% of surveyed GLF companies have initiatives in place for hiring women with 25% of these focussed on hiring mid-management levels. It is the mid-management level which was recognised by several GLF members to be the level that telecom companies struggle the most hiring. One GLF member stated that "We have great balance at entry level and at senior levels, but not enough female talent getting into the middle to feed the top level in the long term". At the graduate level, many GLF members expressed little or no challenges ensuring diversity but it was raised that there is a need for the industry to increase the attractiveness of telecoms as a whole to expand the talent pool. As such, the primary focus at graduate level was ensuring the best talent enters the industry.

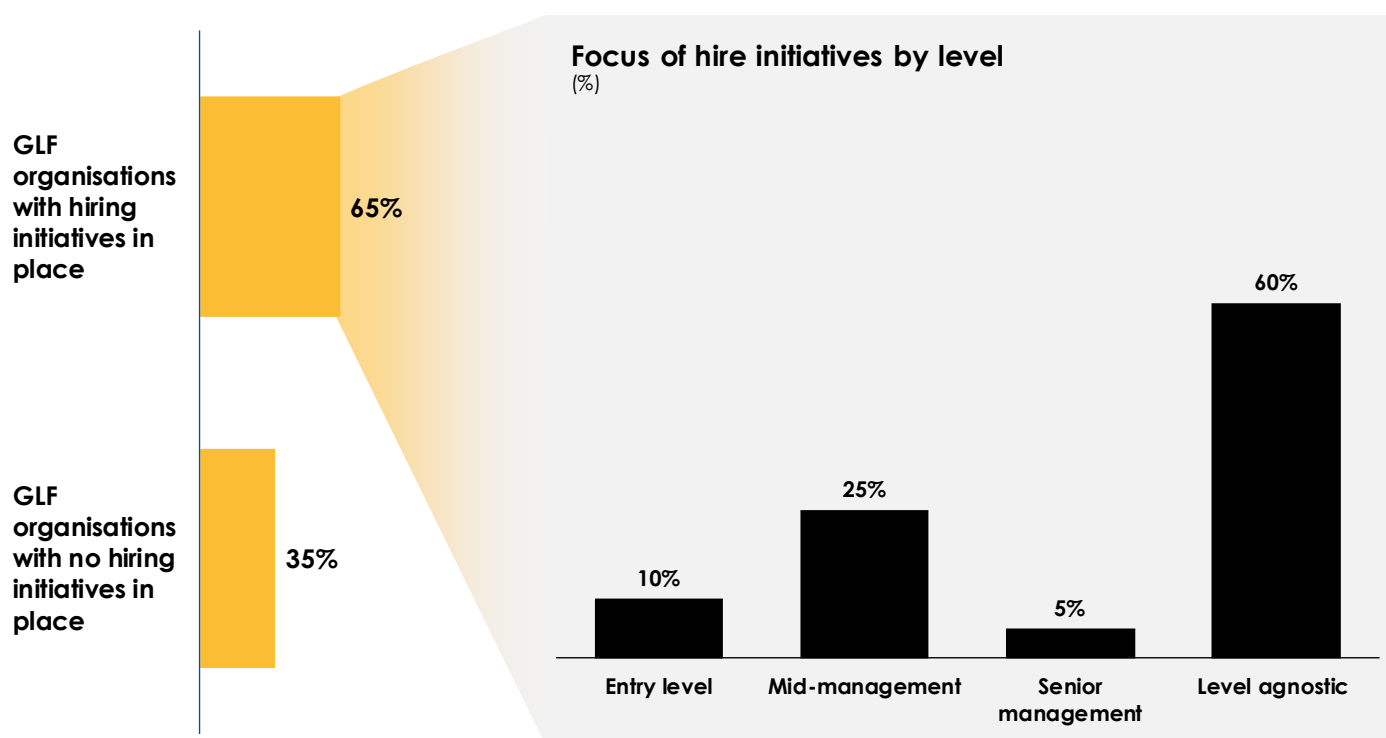
For those GLF companies that had gender diversity initiatives for talent acquisition, these covered areas including "setting gender balance targets" or ensuring a "diverse slate of candidates". As examples from GLF member companies it was explained in interviews that:

- HR works with the Hiring Manager to ensure that a proposed slate of candidates is diverse and reflective of the available talent pool. Processes are then put in place to remove any variability or unconscious bias from the Hiring Manager.
- Ensuring diversity in the 'funnel' that women represent at least 50% of an interview list, with the interview led by a diverse panel.
- Leadership team scorecard based on goal allocation to different levels - set targets within C-1 level and adjusted their objectives towards the achievement of increased gender equality within teams to promote hiring.

To promote gender diversity in applications for internal roles, particularly those in middle and senior management, there are cases mentioned in interviews of "trainings that give women at all levels the right tools to be more present and confident in the workplace" so women put themselves forward for the opportunities that matched their skills. It was recognised through the interviews with GLF members that it is increasingly challenging to hire women into senior roles externally, and hence the need for focussing on processes to enable gender diversity when hiring internal candidates.

A key success factor that was highlighted in ensuring gender balanced hiring was the removal of unconscious bias. Several GLF member organisations spoke of the positive impact of such initiatives sharing their learning of the power of unconscious bias and that if they would have understood that sooner they would have spent less time focussed on conscious discrimination which they found to be less of an issue in comparison.

Exhibit 12: Focus of seniority on hiring initiatives by GLF members



Source: GLF Survey n = 20

GLF members recognise the challenge in attracting women with STEM backgrounds. This is not a new issue given the historic lack of gender diversity in STEM education. When discussing this point with GLF members they shared concern on the impact of the lack of STEM gender diversity. As one example, it was shared that: "There is not enough STEM available

talent in the market, therefore our industry suffers more than others in terms of gender diversity". However, whilst recognising the lack of STEM talent, less than half of GLF member organisations surveyed have existing initiatives to promote STEM subjects in schools to students.

Exhibit 13: Initiatives by GLF members promoting STEM subjects

Do you undertake any initiatives to promote STEM subjects in schools to female students?
(%)



Source: GLF Survey n = 20

PART 2 : DELIVERING PROGRESS IN GENDER DIVERSITY AND INCLUSION

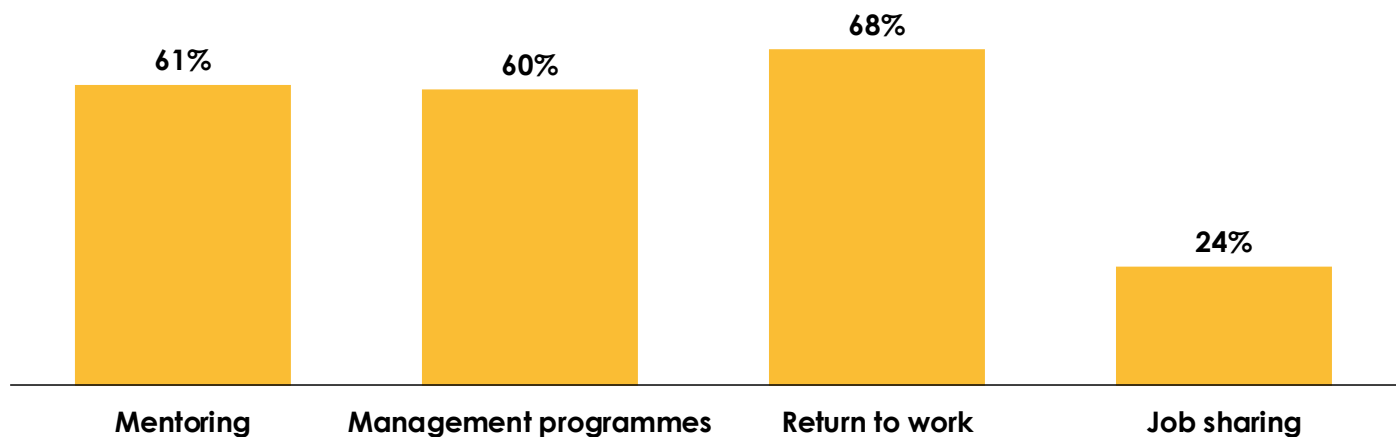
Retention

60% of surveyed GLF companies have initiatives in place to incentivise the retention and promotion of

female talent in their organisations covering support such as mentorship, management programmes and job sharing.

Exhibit 14: Initiatives to retain female talent by GLF organisations

Focus of retention initiatives by level (%)



Source: GLF Survey n = 20

Regarding mentorship, GLF organisations where mentorship programmes existed shared their experience in seeing positive results of the programs launched. In several cases, mentorship programs have been launched with a partner, allowing the joining of forces with other companies and professionals that can coach and guide their employees. To measure their impact, companies track their mentees and evolution before and after having a mentor, with positive results in terms of promotion and advancement through their careers.

Beyond mentorship programmes, the following initiatives were also described by GLF members:

- **Company events** – women leadership events involving all senior members of the organisation where all directors and VPs of organisation were flown to HQ for a complete conference day. In some organisations, the same program is offered to high performers in the CEO-2 to CEO-4 levels within the organisation, is a six-month program run in different universities to help empower women;

- **Publications to increase awareness** - annual internal gender pay gap analysis published to create awareness and break barriers both internal and externally;
- **Policy redefinition** - enhanced maternity / paternity policies, FLEX policies to enable better work life balance such as part time or journey reduction, work from home and work from other offices where applicable;
- **Role model promotion** - more companies are now launching workshops and talks with special guests that by sharing their experience and path to get where they are can create impact.

Looking beyond mentorship, sponsorship is a key issue. As explained by one GLF member organisation: "Ensuring women have good sponsorship is key. It is not a challenge to get women mentorship. Sponsorship is a very different conversation and requires a closer working relationship to understand working style and ambition. For a woman it can be harder to create that level of connection in the workplace."

Many of the GLF organisations have undertaken initiatives to promote the retention and promotion of women within their organisations.

Verizon is one case study of a carrier leading several initiatives to retain and advance female talent. Their focus is working towards retention actions that encourage women to not only stay in the workplace but ensure they advance. Initiatives in Verizon are led by their Chief Human Resources Officer and Chief Diversity Officer alongside a defined Leadership Council. Five initiatives within Verizon are:

- **Women's Association of Verizon Employees (WAVE);** WAVE includes both men and women who promote the professional development of women within Verizon, their local communities, and the technology sector, focusing on building recruitment efforts of women and encouraging gender equality;
- **Women's Inclusion Network (WIN);** WIN strives to be the change by championing women's leadership and advancement while providing an open forum for employees to address the reality of the experience for women in the workplace;
- **Women of the World (WOW);** is an innovative leadership development program launched in 2019 where 1,800 women started a seven-month journey of self-discovery that focused on personal brand, self-leadership, effective communication, critical thinking and owning their career. An interactive learning experience comprised of in-person workshops, career expos, online learning and tools;
- **Women in extended reality;** is an accelerator program founded as a VC firm that exclusively invests in early stage VR/AR and AI start-ups founded by women, providing resources and tools for them to succeed.
- **MAKERS;** MAKERS is Verizon's media brand with the mission to accelerate the women's movement through stories of real-life experiences. It has developed a large video collection of women's profiles, live events and digital content. In 2019, it had 790,000 followers across social media platforms and 20+ million views of the 2019 MAKERS conference.

Verizon has been measuring the impact of their initiatives mostly through the launch of surveys that measure growth and female retention, employee engagement and the impact on the customer base, mainly on female customers.

Telecom Italia Sparkle provides another relevant case study. They are, by their own description, at a more nascent stage when it comes to adapting the workplace to support gender diversity but are undertaking several initiatives. Four such initiatives are:

- **Smart working;** an internal policy adopted from Telecom Italia Group by its subsidiary Sparkle, it started as a casual initiative of working remotely (from home or other offices within Italy) once a month. Given the positive impact and reception by its employees, Sparkle decided to extend it to a once-a-week policy as of now;
- **Mentorship;** selective program launched as a partnership with an association that unites multiple companies, taking three women of each company to share their personal and professional experiences with the aim of developing a cross-industry and international mentorship;
- **Part time positions;** voluntary choice by employees to reduce up to 50% of their commute, taken on a case by case basis. The initiative aims to minimise the impact on someone's career, hence such requests usually come from administrative positions and operations, given the limited responsibility;
- **Family leave and flexibility policy;** flexible policy of working hours that allows employees to adjust their schedules based on their familiar needs.

Telstra has several programmes designed to develop and retain female talent. Two initiatives of relevance shared as input to this report are:

- **Brilliantly Connected Women** – a programme that brings female role models from within Telstra and externally to engage with women in the organisation to support with career guidance
- **All Roles Flex** – five years ago, Telstra designated that all roles in the organisation should support work from home and flexible working.

Other examples of female development programmes are Tata Communications' 'Take the Lead' initiative which provides mentorship and guidance for female team members, and Sprint's 'Own your own element' programme which seeks to empower female colleagues by providing all the tools required for them to be successful in their careers.

Return

68% of surveyed GLF organisations stated that they had 'return to work programmes' that aim to give the right training, support and flexibility to employees that have been out of work temporarily.

Examples of ongoing initiatives by GLF members are:

- 'Returnship' programs, designed to build a workplace ready for the employee when the returning time comes across;
- Self-confidence programs, to ensure that women feel empowered to lead with the changes in their life and have a stable balance between work and home.

"Returnship" programmes are critical because it can be challenging for people who have taken an extended break to effectively assimilate back into the workplace, especially if they are coming back with different needs. Companies also realise the value that previous employees have compared to hiring and training new joiners and are willing to make the necessary investment to build a place for them to return. A good example of such effort is Colt, where they are supporting people who have been out of work for more than two years to ensure that they are given the right training and support to be reinserted in the workplace. Such an initiative can provide a positive return on investment in comparison to hiring again in the market, as it is easier to accommodate the workplace for returners. To encourage returners, Tata Communications has an alumni re-connect programme which provides a monthly mailer communication to all alumni including information about available roles.

A consistent theme across GLF organisations in attracting women to return to roles after a career break was to ensure ongoing connectivity during their time out of the office. It was noted that given the fast evolving nature of telecoms organisations there can be substantial change during the period of leave and as such it is critical to keep in contact.

2. LOOKING BEYOND THE CARRIER INDUSTRY

Beyond telecommunications, there are many relevant case studies of gender diversity initiatives that are driving positive impact within organisations – these could be reference examples for GLF organisations.

Companies across sectors are implementing initiatives at the acquisition, retention and return career stages, many of which could be relevant

examples for GLF organisations to learn from. Within this report we have taken a non-exhaustive sample.

Acquisition

	Made with code; an initiative driven by Google since 2014 to ensure that young women that have developed their love and passion for STEM in Middle School don't lose it as they grow up. Through this initiative, Google has created a community of young talent to pursue coding and computer science. Multiple media and technology companies have partnered in this initiative where Google has already invested \$50m, preparing the path for young female talent to be later acquired.
	Hacker grants; three-month scholarships to talented female engineers in the form of an intensive program that teaches them how to improve their skills; the program has been a complete success, increasing the women engineers in the company. The program was born after Etsy realised the difficulty to hire senior female engineers and therefore worked to allow more female engineers to reach the workplace.
	Member get member: Intel decided to give double referral bonus to all employees that referred a woman in the workplace. In the first year since launch, Intel hired 43% of women at all ranks.

Retention

	Maternity improvement: an increase to five months in Google's maternity leave benefits was executed to increase the retention of women in the company after internal figures indicated that many more women than men were leaving at the same level and acknowledged that there was a benefit in investing to retain an existing employee instead of hiring a new one.
	Parental leave equality: Mark Zuckerberg, the CEO of Facebook, changed the industry perception by taking a paternity leave of four months after his first child was born, stepping towards a fairer workplace and setting an example from the top of the organisation. Such an increase in paternity leave supported the ability to balance parenting responsibilities.

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	Sponsorship of advancement; Accenture has undertaken multiple initiatives including (1) sponsoring senior women to advance in P&L roles, with an impact of 80% of women in the global executive leadership team being promoted from internal roles; (2) ensuring transparency by publishing gender diversity results, targets and data across multiple regions and (3) career fast-track of high performers in technical positions.
	Corporate Women's Leadership Team (CWLT); committed to the advancement of women in the workplace by making sure that their skills and insights are well represented at all levels; to achieve that, they have launched mentorship programs, sponsorships and leadership development among others.
	No diversity, no IPO; the American bank has publicly stated it will refuse to advise on the IPO of companies that do not have female representation in their Board of Directors. This commitment is sought to incentivise the increase of gender diversity at Board level.

Return

	Relaunch your career; Mastercard's global return program is addressed to mid-career professionals that took a break in their career; the program offers a 16-week program based on location, learning resources to have a quick learning on their business, a structured orientation program, a buddy and other initiatives as part of their "return to work" initiative.
	Ready to return; with the support of external providers such as ReacHire, Visa has launched an internal program that encourages employees to bring back their meaningful skills to work through trainings and coaching sessions that show returners the different type of positions they can fulfil within the company.
	Back to business; through external providers, Cisco has been able to launch a program that encourages employees to support each other when they return to work; through building a network of people that are encourages to share their different experiences and stages on their return to the workplace, showing support and empathy one another.

PART 3

GLF OPPORTUNITY TO TAKE LEADERSHIP IN THE TELECOMS INDUSTRY



1

GLF members acknowledge their role to 'lead from the front' on gender diversity both as executives in their organisations and through the GLF as a whole.

2

Given the uniform importance, the GLF can use its 'voice' as a leadership body for the international carrier industry to deliver a common message and guidelines for companies to consider, but cultural differences across regions support local adaptation of implementing gender diversity programmes.

3

To attract talent, undertaking high-school and university activities, providing paid internships and training programs for entry level positions would help. GLF members recognise that this is an industry-wide, not company-specific, challenge, opening the opportunity for collaboration.

4

To retain talent, programmes covering mentorship, sponsorship, workshops and role modelling are among the most highlighted requirements by interviewed GLF members. They call for sharing of best practices and creating connections between their organisations.

5

GLF members are open to benchmarking the status and impact gender diversity initiatives in their organisation as a mechanism to ensure that they continue to understand the speed of their progression in line with their peers.

The survey, interviews and research for this report have led to several proposals that could be further developed to improve gender diversity and inclusion within GLF organisations and the wider telecoms industry.

1. VOICE OF THE INDUSTRY

GLF members recognised their role as leaders of their organisations and the wider industry to take a prominent role 'leading from the front' on gender diversity. It was recommended that gender diversity be an issue on which the GLF can provide a clear advocacy message on the importance of gender diversity and the aspiration to continually strive to improve gender balance at all levels of their organisation. GLF members can then ensure that the common messages from the industry are commonly deployed across their organisations to

be adapted as appropriate through policies and initiatives in individual companies. Furthermore, in industry convenings such as Capacity Conferences, GLF members can ensure they actively participate in gender diversity forums that are placed centrally, and not on the periphery, of events. It was recognised that given the scale of GLF organisations as employers that driving industry-wide advocacy could lead to positive impact not just in individual telecoms companies but also across wider society.

2. ATTRACTING TALENT

The challenge in attracting diverse talent into GLF organisations was recognised to be an industry issue rather than that of specific companies. Several initiatives were proposed:

Paid internships

Launch paid internships for women at all level aiming to provide them access to the telecoms sector and develop their technical capabilities. There is the opportunity to leverage such internships to offer initiatives beyond pure work and give visibility of the day of a senior member of the organisation through shadowing programmes. Internships will allow industry companies to focus on attracting STEM talent at an earlier stage, giving insight into a potential career path. Through such internships, female talent could get access to GLF members or female leaders in GLF organisations who can provide mentorship.

Training programs for entry level positions

Develop and launch training programs tied to entry level jobs to show the paths forward. Such training programs would aim to provide end to end visibility of the industry beyond a specific career or job position, highlighting the potential paths that

can be taken. Additionally, some GLF members suggested that the GLF as an organisation could create scholarship programs by collecting small contributions from each organisation to cover the expenses and then offer exposure opportunities for applicants across different organisations.

Increase visibility of industry role models

Several GLF members proposed increasing the number of women that lead, present and take part in industry events, such as those organised by Capacity, to increase awareness of women in the industry that could then inspire, or serve as role models for women to enter the industry.

Sharing “best practices” across organisations

Members encouraged GLF companies to assess how they can better leverage the GLF platform to share best practice amongst themselves for hiring female talent – this can include both the sharing of information via reports but also building a network of individuals between companies.

Collaborate with other industry organisations

There is potential for the GLF to form partnerships or alliances with other organisations such as World Economic Forum, GSMA or The Rise Up Leadership Council to scale activities to promote attraction of female talent to the industry. Ensuring a consistent message and alignment of activities will drive scale beyond what any organisation can do individually.

One organisation of particular relevance to the GLF is the Global Women in Telco and Tech ("GWTT"),

which brings together the wider telecoms and tech sectors under a global brand where we can discuss, accurately measure, critique and share key findings and advice for improving gender balance. Through convening the industry at conferences and awards it pushes the dialogue forward on key topics including changing the conversation from diversity to inclusion, encouraging and supporting return-ship, retaining the next generation within telco, engaging middle management to stop mid-career drop off, and bringing men into the conversation.

3. RETAINING TALENT

When considering how the GLF could support its members, and the broader carrier industry, with the retention of female talent, three areas were proposed:

Mentorship programmes

Launch mentorship and sponsorship programmes as a GLF initiative, leveraging its wide access to organisations, industry leaders and relevant experts. The purpose is to teach and mentor women on how to do the best use of active policies in their companies, such as job sharing, part time journey or flexible times, to balance their personal and professional life but still boost their professional career. Through creating a centralised, or common, approach the GLF can increase the level of resources available to individual companies and leverage a network of mentors across the industry.

Cross-company engagement and learning

Develop cross-company programmes that enable women to engage with peers in other organisations. One of the benefits of GLF membership is having wide industry representation and creating networks as has been done, for example, in Network Security. A similar approach can be taken to gender diversity so that organisations can learn from each other. Topics that could benefit from inter-company engagement could be learning on best-practice policies, approaches to upskilling and removing unconscious bias.

Workshops

The GLF could sponsor workshops with the aim to advance their commercial and technical expertise ensuring gender balance in participation. Being a global organisation, the GLF has the capacity to bring together the right talent and speakers that can centrally set the foundation for these workshops and distribute them across organisations.

Build industry role models

The GLF should seek to promote female leaders as role models in the industry and ensure their inclusion in key industry discussions. Within events this manifests in the inclusion of female leaders across conference sessions rather than purely ensuring the presence of a 'women in telco' session. GLF members should actively seek and mentor emerging female leaders in their organisation to build such role models.



4. MEASURING THE IMPACT

GLF members believe that initiatives can be measured and quantified to ensure their impact can be understood and communicated, however measurement is not a pre-requisite to demonstrate value given the inherent belief of the benefits of diversity. Potential approaches to measurement suggested by GLF members include:

Internal

- 1) Define a consistent company performance metric system for female representation and pay gap / equity – publish the results in the GLF via a 'black box' to allow companies to benchmark their own performance;
- 2) Seek GLF members to each set, and anonymously share, their internal targets for female representation and pay equity improvement – publish the results in the GLF via a 'black box' to allow companies to benchmark their own aspiration and progress.

External

- 1) Build a consolidated annual report at the GLF level, as is done on Fraud, with the results and performance of all companies on diversity initiatives;
- 2) Launch a 'Charter' that publicly states the GLF member organisation commitment to improving gender diversity within their companies by aligning behind specific guiding principles;
- 3) Publicly set common objectives between the GLF members to demonstrate that they are taking collective action to improve gender diversity.

The GLF's membership and position in the industry creates the opportunity to positively impact the progression of gender diversity both in their organisations and the broader industry.

If a global organisation can establish a common aspiration and encourage its members to work towards it through their own actions, great progress could be made not just for the telecommunications sector but also society at large.



POST-SCRIPT: IMPACT OF COVID-19

The GLF's report on gender diversity, inclusion and belonging has taken several months to evolve from concept to publication. We wanted to ensure that we took time to speak directly with as many members as possible to provide a comprehensive and balanced representation of what is happening in our member's organisations. In a global context, this was a report researched and written both before and during the COVID-19 event. COVID-19 is an ongoing event for which, whilst there is much discussion of the 'new normal', we do not yet have medium or long-term visibility. As such, whilst it is important we are cognizant of the potential sustained impact of COVID-19, as a GLF we decided not to re-write the entire report through the COVID 'lens'.

COVID-19 is transforming, at least currently and for the near term future, how we work. As large scale employers we have managed the transition of significant shares of our colleagues to work-from-home whilst also enabled our operations teams to continue to access the field. As we manage this transition and operate under this new model we must ensure that we protect the diversity, inclusion and belonging of our organisations – this will cover all elements of diversity, including gender.

Within this report we grouped initiatives regarding gender diversity, inclusion and belonging into three – attract, retain, return. I anticipate that COVID-19 can have an impact on all. Some impacts will be negative which will require proactive mitigation whilst others will be positive enabling further acceleration of progress. I would like to highlight three, which whilst not exhaustive, provide relevant examples:

1. Equality in video conference meetings – we have moved from our corporate interactions being carried out in person to primarily over video conference. Inequalities that exist in a physical environment – such as a difference in perception towards male executives versus female executives when they speak up, or speaking time and frequency of questions – are amplified in the online setting¹⁰. Online communication takes away more subtle non-verbal signals that can be used in face-to-face meetings, and facing a wall of faces on a video conference screen can deter less confident speakers. As leaders of our organisations it is critical that we are aware of this diversity and we proactively manage it to ensure we are utilizing the full potential of all of our colleagues.

2. Flexibility for remote work – ability to undertake remote work was identified in this report as an issue for retaining and returning colleagues. The COVID-19 event has effectively been an international remote working test from which we are starting to see leading organisations state an outlook of 30% of their workforce continuing to work remotely. Hopefully, such measures will enable a greater share of our colleagues who do not wish to work from the office to be able to do so, and adapt our culture so that you can feel completely 'included' wherever you are working.

3. Appreciation of work from home – in the past months many of us have been working from home, and with that has come an increased appreciation of what that means – not only from the remote working but, importantly, balancing with home life such as home schooling children. The appearance of a young child in the background of a video conference screen, the type of image that went viral two years ago in a BBC news video, is now not frowned upon as it may have been before. I hope that we can sustain this appreciation of what 'work from home' means going forward along with the recognition from this period that it is a model that for many colleagues can work effectively so that we may support it going forward. In doing so, we can more greatly include members of our workforce who may have struggled to stay in, or return to, our organisations.

Within my organisation, I have first-hand experience of the hard work to look after our colleagues throughout the COVID-19 event to ensure that they can stay safe and support their customers seamlessly. From speaking to my colleagues on the GLF I know this is consistent across the industry. Through what is an extremely challenging time for us all, as one positive opportunity I hope we can come through this enabling an acceleration of diversity, inclusion and belonging in all of our organisations.

Eric Cevis

President, Verizon Partner Solutions
Chair, GLF Working Group – Diversity, Inclusion and
Belonging

June 2020

¹⁰<https://www.nytimes.com/2020/04/14/us/zoom-meetings-gender.html>



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