May 2024

GLF DIVERSITY, INCLUSION AND BELONGING (DIB) 2024 REPORT

This report has been commissioned by:

The ITW Global Leaders' Forum (GLF) is a network of 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 telecommunications industry.

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In 2019, the ITW Global Leaders' Forum recognised that, as a leadership body for the international connectivity industry, they needed to focus on diversity, inclusion and belonging. Individually we all recognised the value of being fully diverse and inclusive by design but saw that our companies were some way away from achieving this, and as an industry there was progress that could be made. Since then, diversity, inclusion and belonging has been a consistent focus at the ITW GLF Board, starting with gender diversity and moving forward to cover topics including racial injustice, inclusion, reskilling/upskilling and this year, for the first time, neurodiversity and the potential impact that artificial intelligence (AI) can have on improving diversity and inclusion.

This year's report highlights that, whilst for the majority of companies diversity and inclusion is a stated priority, with the exception of gender the diversity axes don't receive a level of focus that supports this. It also finds that where companies are able to focus and where there is C-Level sponsorship, they make more progress. However, some companies still encounter difficulties to advance in gender balance at management level. The report has also indicated companies have yet to utilise AI for DIB purposes, due to both ethical concerns and a lack of understanding regarding its potential benefits. Lastly, both upskilling and reskilling remain a priority for organisations but economic conditions create pressure. Companies will need to find a way to be more efficient with resources to deliver the same outcomes.

For the first time, in this year's report we also look at measurement of gender diversity — it is encouraging to see that 80% of the companies that responded to our survey are undertaking measurement. I hope that this number will increase over the next year, as it is only through consistent measurement that we can accurately set an aspiration and track our progress,

I would like to thank the forty companies that participated in this year's survey and all the individuals from across the industry who spoke with us to collate the insights from this report. GLF writes this report each year to serve as a "pulse" of the connectivity industry for where we stand on diversity, inclusion and belonging, our progress over the last 12 months and the priorities looking forward. Since 2019, as an industry, we have come a long way, but it is clear there is more to be done as we embrace technologies to support greater diversity and inclusion and tackle head-on the reskilling and upskilling challenge facing the industry. Should you have ideas of what more we can do as an industry, I would love to hear from you!

Marisa Trisolino
Chair, GLF Diversity, Inclusion and Belonging Working Group
CEO, CMC Networks

01 INTRODUCTION

PARTICIPATING ORGANISATIONS

MANY THANKS TO THE COMPANIES WHO CONTRIBUTED TO THE MAKING OF THIS REPORT

amsix · AQABA DIGITAL HUB · angola cables · axiata · AzerTelecom · AT&T · bayobab · BT

BTS · BAWAY · 中国电信 CHINA TELECOM · CMC NETWORKS · colt · eurofiber · eunetworks

EXA · expand · e& etisalat and · GTC GLOBAL TELCO CONSULT · IMC · IDENTIDAD TECHNOLOGIES · iBASIS · LUMEN TECHNOLOGIES

Neos NETWORKS · orange · PCCW Global · SPARKLE · SOMOS · Sunrise · symbio · sinch · Telefónica Global Solutions

Telstra · Telin · T · · · DEUTSCHE TELEKOM GLOBAL BUSINESS · UGI CORPORATION · verizon · vodafone · voiped · voipfuture · yondr

KEY FINDINGS

The telecommunications industry today recognises the importance of diversity, inclusion, and belonging (DIB) as essential to enhance business performance and enrich corporate culture. This report seeks to assess the industry's progress on DIB, provide a view of the potential use of AI in DIB advancements, and analyse how companies are tackling one of their biggest barriers to business transformation — the skills gap.

In the 2024 GLF DIB report, we cover four areas:

1) Measuring the progress on DIB: highlights the proactive steps the industry is taking towards DIB and shows its progress over time

2) A journey towards gender balance and inclusivity: presents in more detail how the industry is bridging the gender balance and inclusivity gap, detailing the tools being used and the major challenges faced

3) The nascent state of neurodiversity and AI in supporting DIB goals: (1) offers a simple explanation of neurodiversity and provides insights on the advancements the industry has made in this regard, and (2) provides a view of the potential role AI may play in DIB advancements

4) Upskilling and reskilling remain vital: underlines the importance that reskilling and upskilling will have in the future of the telecommunications industry and highlights the proactive steps the industry is taking towards DIB and its progression over time

By examining these four crucial components, this report aims to provide a comprehensive overview of the progress and key areas of focus in relation to diversity, inclusion and belonging within the telecommunications industry.

THE THREE-STEP JOURNEY IN DIB

	DIVERSITY	INCLUSION	BELONGING
DEFINITION	Diversity refers to the presence of differences within a given setting and encompasses a range of human characteristics and attributes. It is about recognising, respecting, valuing and promoting differences in race, age and gender, among others.	Inclusion is the practice of ensuring that people feel a sense of belonging in the workplace. It involves creating an environment where all individuals are treated fairly. Inclusion is about actively inviting the contribution and participation of all people.	Belonging describes the experience of personal involvement in a system or environment so that a person feels emotionally secure and socially accepted. It takes place when an individual can genuinely present their true self and contribute positively without the fear of discrimination.
ANALOGY	Diversity in a company is like ensuring your party guest list includes a wide variety of people from different backgrounds and experiences.	Ensuring that everybody attending the party is invited to dance, rather than just be present: It is ensuring active participation from everyone. However, people may still feel uncomfortable to show their true selves, fearing they will not be accepted.	Belonging is when everyone at the party feels comfortable to dance as they like, whether that is a slow dance, a group dance, or a solo performance.
WHAT COMPANIES NEED TO DO	Hire employees from multiple genders, ages, sexual orientations, with physical disabilities and/or another dimension that reflects societal diversity.	Implement policies to ensure everyone can participate. This can involve wheelchair accessibility, a flexible working schedule, or equal opportunities for advancement..	Create and maintain a culture where feedback is welcomed, contributions are valued, and there is mutual respect for differences. A “belonging” culture leads to a deeper sense of commitment and loyalty from employees..

Lower difficulty — Higher difficulty

COMPANIES SHOULD TREAT DIB AS A THREE-STEP PROCESS WHERE THE END STATE IS ENSURING THAT EMPLOYEES HAVE A SENSE OF BELONGING WITHIN A COMPANY THAT HAS MANAGED TO BE DIVERSE IN MULTIPLE DIB DIMENSIONS

Source: CIPD (Chartered Institute of Personnel and Development) on Diversity; CCL (Center for Creative Leadership) on Inclusion; McKinsey on Diversity

WHAT IS REQUIRED TO CREATE A SENSE OF BELONGING AND WHY IT SHOULD MATTER TO COMPANIES

75% of employees

have felt like they **do not belong at work**[2]

Only 41%

of employees feel a deep sense of belonging at work[1]

High degrees of belonging led to a **56% increase in job performance** and **a 50% decrease in turnover risk**[1]

Clarity of leadership
Having strength and impact empowers women to lean into their power

Reducing perfectionism, favoritism and **bias** drives greater belonging for all employees

Employees with a low sense of belonging are **77% more stressed** and **109% more likely to experience burnout**[1]

Employees with a higher sense of belonging are:

- **24%** more resilient
- **36%** happier[4]
- **92%** more likely to experience professional growth

01 INTRODUCTION: KEY FINDINGS

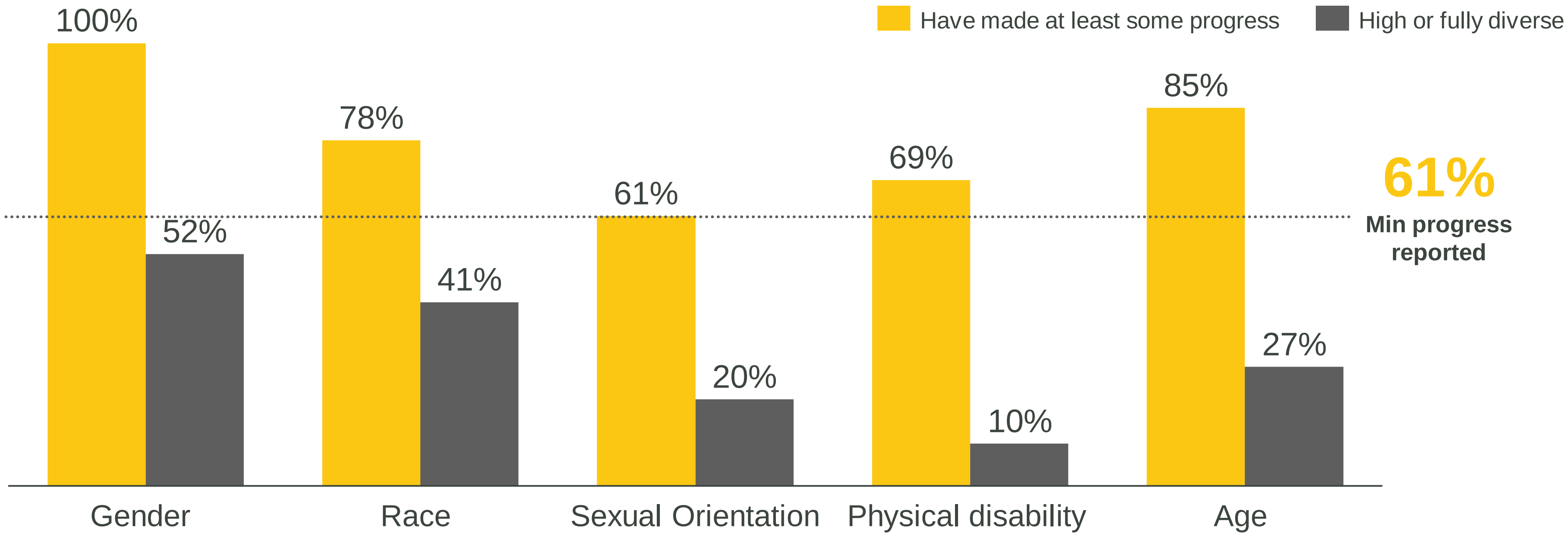
MEASURING THE INDUSTRY'S PROGRESS ON DIB

01

85% of companies consider DIB a priority and 76% have appointed a CEO, or a direct report to the CEO, to be directly responsible for DIB.

At least 61% of the companies surveyed report some level of progress on each of the DIB components, but the industry is still far from being highly or fully diverse.

Fig. 01. On the journey of evolving DIB what is the status of current progress[1]
(% of respondents)



Note: (1) Have at least made some progress includes; in progress, highly diverse and fully diverse; Source: GLF Survey 2024 n = 42

85%

of companies consider DIB a top or a strategic priority in 2024

76%

of organisations have tasked the CEO, or a direct report to the CEO, with responsibility over DIB

90%

of companies give high focus to at least one DIB factor in 2024

A PATH TOWARDS GENDER BALANCE AND INCLUSIVITY

02

Companies are implementing policies and initiatives to bridge the gap in female representation and to be more inclusive, setting targets, and tracking and measuring their progress towards these goals.

Fig. 02. Organisations tracking and measuring progress or setting targets towards gender diversity and inclusion goals (% of respondents)

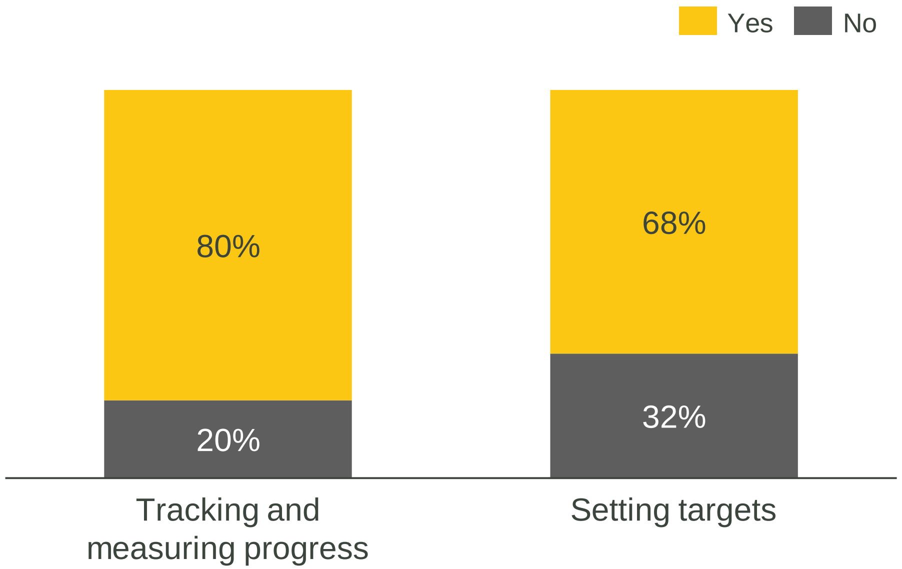
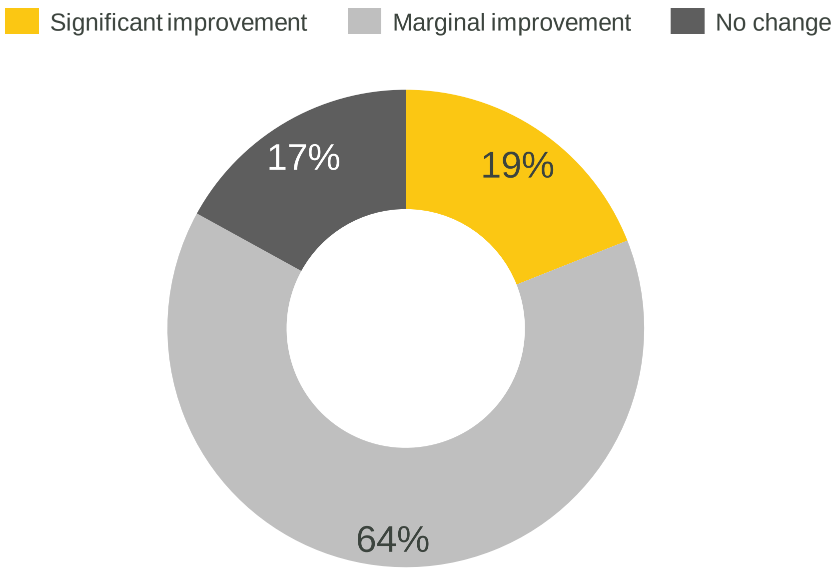


Fig. 03. What is the progress level within the organisation on inclusivity (% of respondents)



Source: GLF Survey 2024 n = 42

95%

of organisations have at least one policy to improve gender balance

85%

of companies report at least one initiative to hire and retain females

83%

of companies report marginal or significant improvements in inclusivity

A PATH TOWARDS GENDER BALANCE AND INCLUSIVITY

03

Difficulties in bridging the gender gap are higher at the management level, where there is not only a higher gap but also a lower level of progress

Fig. 04. By seniority level, what percentage of the organisation is comprised of women?[1]
(% of respondents)

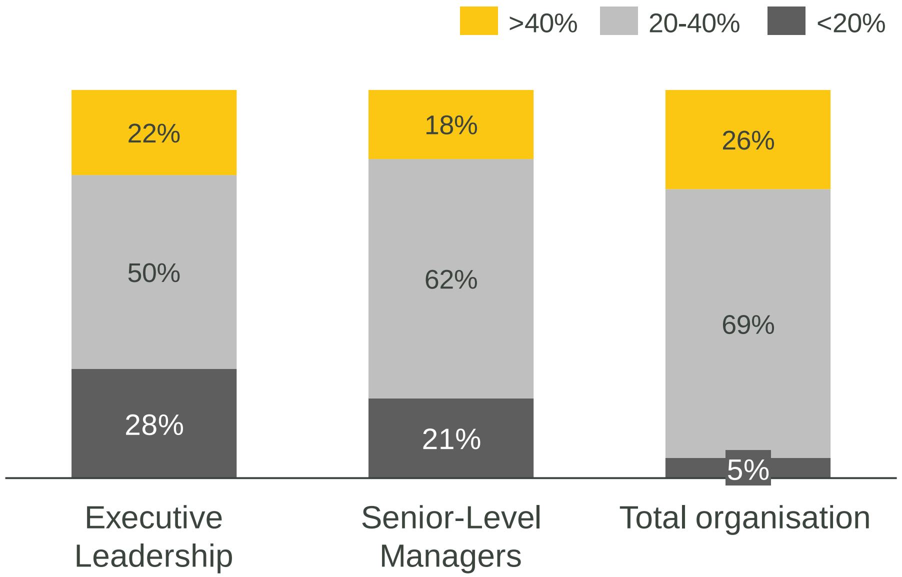
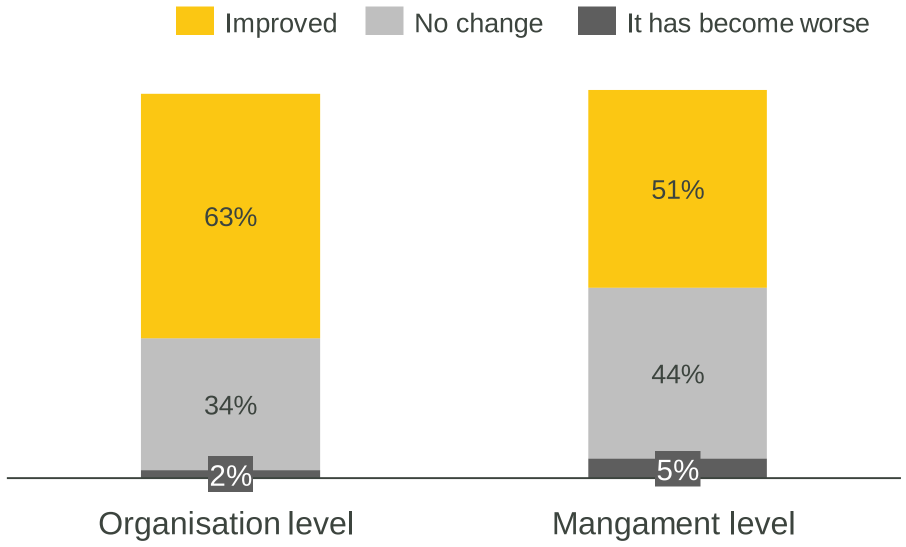


Fig. 05. Gender balance improvement in the last 12 months
(% of respondents)



Note (1) Executive Leadership refers to C-level, C-1; Senior Level refers to C-2, C-3. Source: GLF Survey 2024 n = 42

49%

of organisations still see disparities at leadership level

26%

of companies with more than 40% of females within the organisation

24%

report faster improvement in gender balance at the organisational level than at the management level

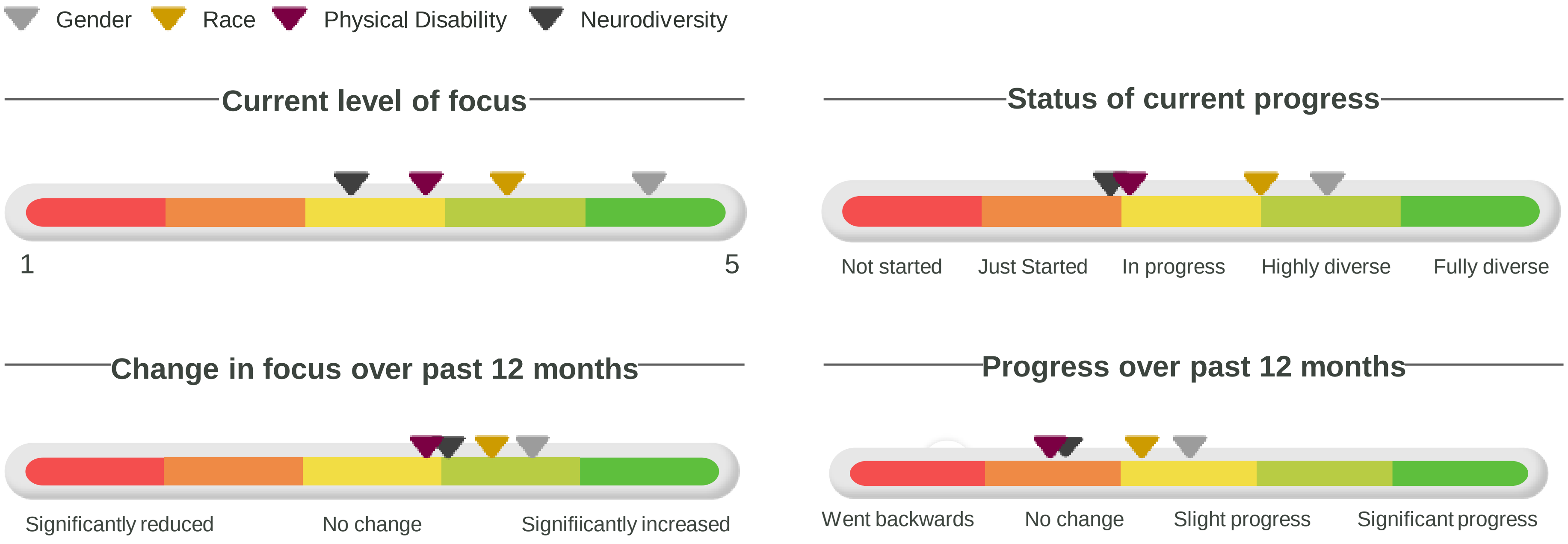
01 **INTRODUCTION: KEY FINDINGS**

THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS - NEURODIVERSITY

04

Neurodiversity currently has a lower level of focus compared to other diversity components, but a third of organisations report having made some advancements

Fig. 06. Level of focus and progress within organisations with regards to Neurodiversity
(Average score of respondents with lowest level ranking 1 and highest ranking as 5, except for progress over 2023 running from 1 - 4)



14%

of the global population is considered to be neurodiverse[1]

35%

of companies reported some progress during 2023 in neurodiversity

7%

of companies report being highly or fully diverse in neurodiversity

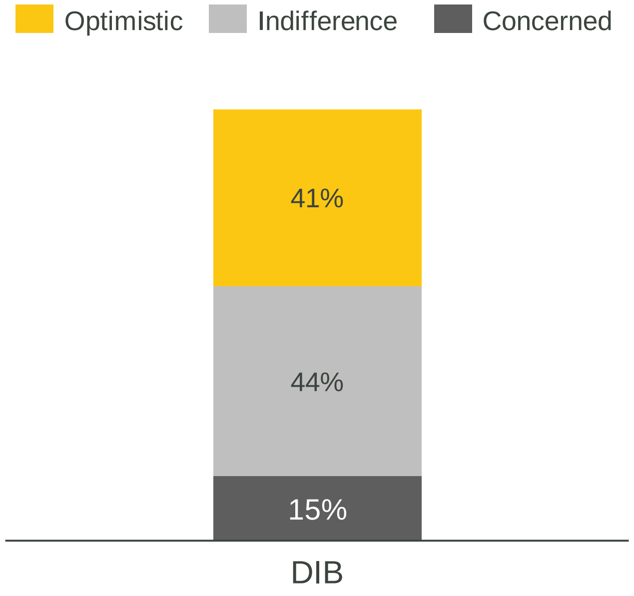
(1) Disability IN: Neurodiversity @ Work Playbook;; Source: GLF Survey 2024 n = 42

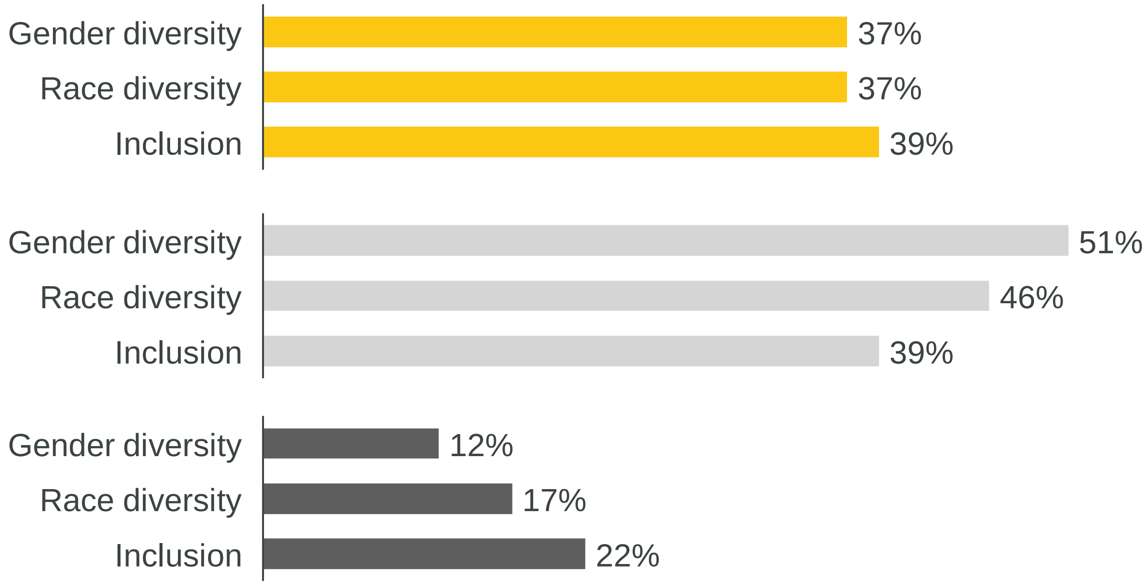
THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS – ARTIFICIAL INTELLIGENCE

05

Ethical concerns and limited understanding of the potential uses of AI has resulted in the current indifference towards AI in DIB and low commitment to its application

Fig. 07. Opinion about the potential impact AI will have on the following:
(% of respondents)





; Source: GLF Survey 2024 n = 42

18%

of organisations are either using or planning to use AI technology for DIB purposes

12%

of companies are concerned about the use of AI for gender diversity purposes

22%

of companies are concerned about the use of AI for inclusivity purposes

UPSKILLING AND RESKILLING REMAIN VITAL

06

Investing in learning and development is vital for organisations, as the skills gap in the labour market is seen as the top barrier to transformation

Companies will need to be more efficient with resource allocation; although ~ 90% of them give priority to upskilling, 22% reduced L&D budget due to economic pressure

Fig. 08. Level of priority given for upskilling and reskilling in organisations (% of respondents)

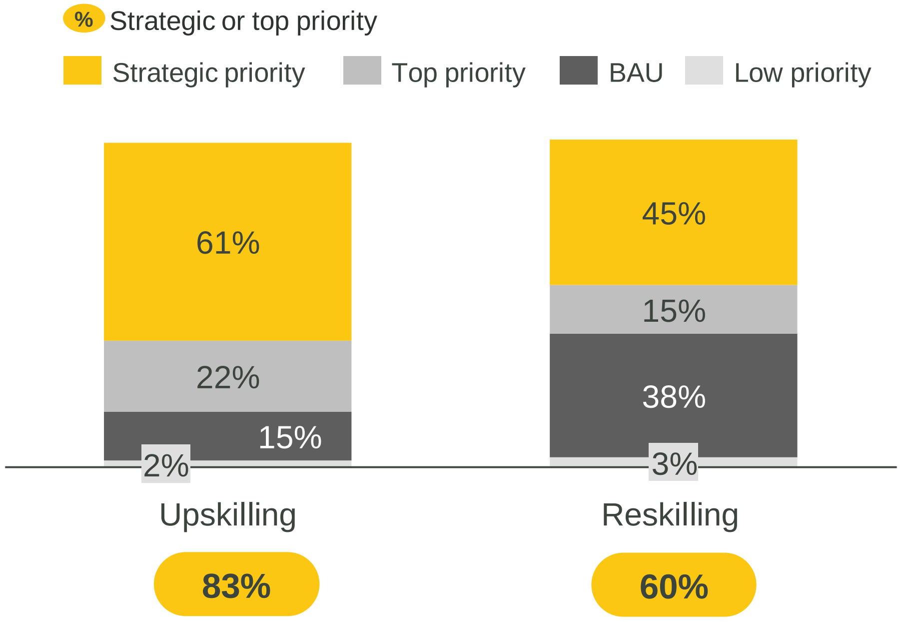
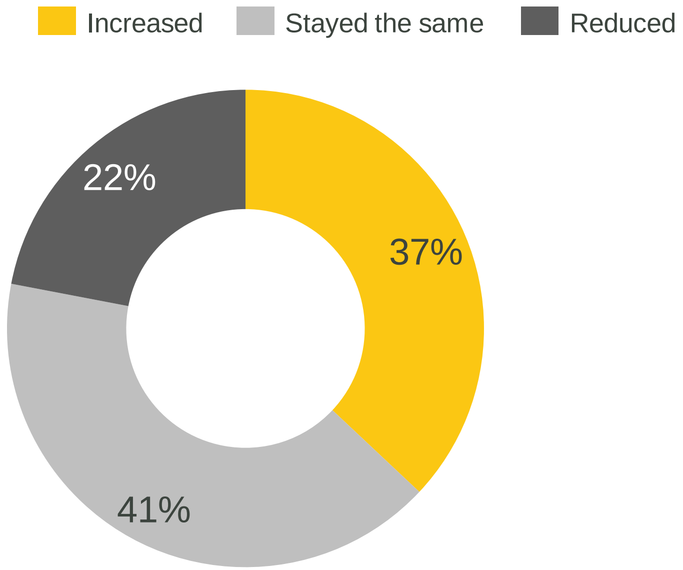


Fig. 09. Change in 2023 – 2024 Learning and Development budget (% of respondents)



Skills gap in the local labour market is seen as the top barrier to transformation by organisations[1]

81%

of companies actively target entry level/graduates or juniors for upskilling

95%

of organisations actively target at least one level of the organisation[2] for upskilling or reskilling

; (1) World Economic Forum; (2) Considers entry level, juniors, mid-management and senior-management; Source: GLF Survey 2024 n = 42

02

MEASURING THE INDUSTRY'S PROGRESS ON DIB

KEY FINDINGS

The telecommunications industry has recognised the importance of DIB, and organisations are making efforts to advance towards more diversity in multiple areas, including gender, race, physical disability, sexual orientation and age. This section examines how the industry is evolving its focus and progress on the different components.

01 **DIB continues to be a priority:** 85% of companies have identified the overall concept of DIB as a strategic or top priority for the organisation. This prioritisation is supported by the fact that ~90% of companies surveyed report a high focus on at least one DIB element and at least 70% have appointed the CEO, or a direct report to the CEO, to have direct responsibility over DIB progress.

02 **Gender and race are key focus areas:** Gender equality continues to be the top priority for organisations, with 100% of companies reporting at least some level of progress for the first time. However, race is also gaining relevance with an increasing number of companies now focusing on this metric. Additionally, the recent 6% increase in focus from 2023 to 2024, along with a perceived reduction in the complexity of compliance with racial diversity policies, suggests these advancements are likely to continue.

03 **Visibility, measurement and financial results are key enablers for DIB progress:** Companies seek financial results from their investments. Hence, DIB elements that are visible, easy to measure and/or will provide better financial results will be prioritised. Limited budgets, however, have slightly hindered focus and advancement on particular DIB metrics such as sexual orientation and physical disability.

04 **Tangible benefits of DIB could protect budgets:** An increased number of organisations are investing in DIB because they see it providing commercial benefits or that it reflects the customer base. With more tangible benefits associated to DIB, it is more likely DIB budgets will remain protected in times of economic pressure.

DIVERSITY, INCLUSION, AND BELONGING IS A LONG-TERM PROJECT, AND COMPANIES FOLLOWING THE FIVE STAGES OF THE DIB JOURNEY WILL BE MORE LIKELY TO SUCCEED IN THEIR EFFORTS

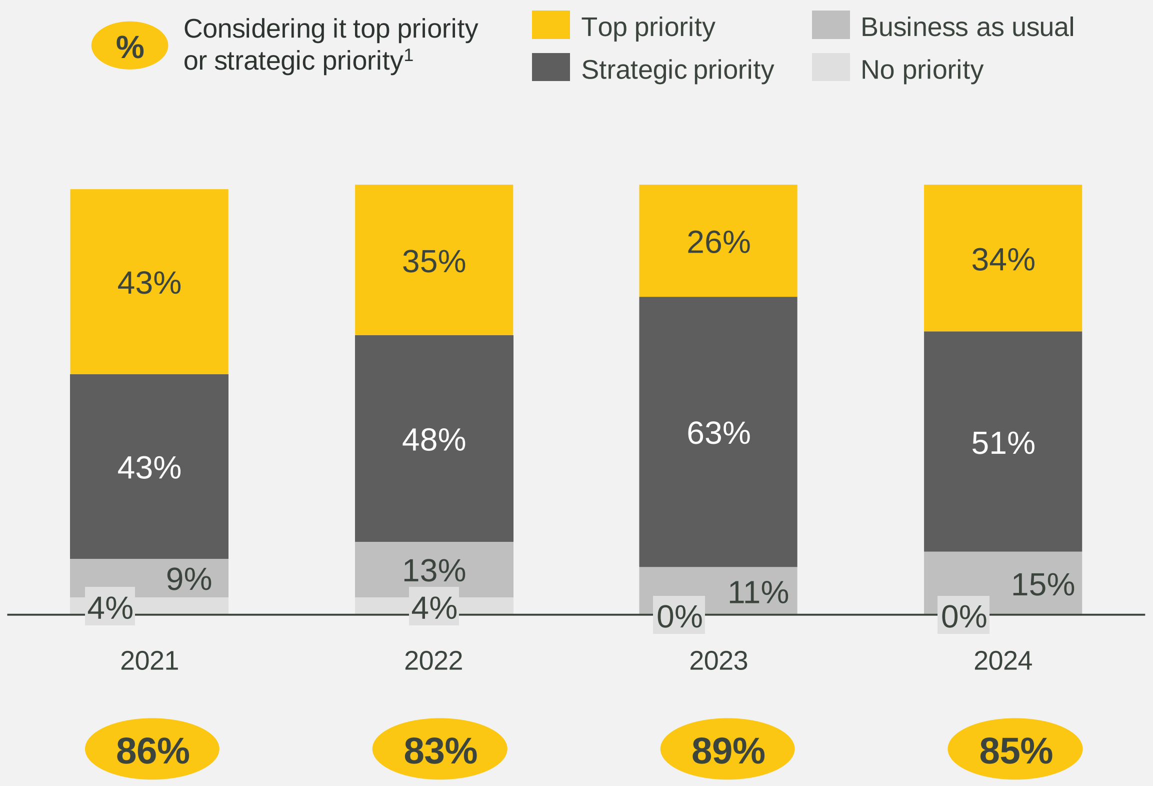
The path towards DIB is not a short-term project; companies rushing into it before being ready will likely fail to meet its goals, whereas companies following the five stages of the DIB journey will be more successful in their efforts, making it more likely to progress

01	AWARE	DIB is new to the companies at this stage, and they are just becoming aware of its importance. These companies should be honest and realistic in their assessment of where they are currently and where they want to be.
02	COMPLIANT	Companies at this stage are compliant with industry and government requirements. However, some companies have done so by pursuing compliance voluntarily and others because they have to. The latter have most likely skipped the "Aware" phase and will still need to do the foundational work if they want to advance.
03	TACTICAL	Companies at this stage have moved beyond meeting imposed requirements and are fully engaged in executing their own DIB initiatives. The companies are on their way to changing their cultures but still lack a strategic DIB approach that would drive the entire business.
04	INTEGRATED	This stage is achieved once an organisation has aligned internal and external efforts and connected top-down and bottom-up efforts. Companies at this stage have defined their DIB strategy and developed a culture that embraces DIB.
05	SUSTAI-NABLE	These are the companies whose DIB efforts are deeply embedded in their DNA, having entered a sustainable stage. Their DIB efforts have passed stress tests such as economic challenges and changes in leadership but still succeed and continue to strengthen.

Source: Harvard Business Review

DIB CONTINUES TO BE A PRIORITY FOR 85% OF COMPANIES

Fig. 10. Importance of overall concept of Diversity, Inclusion and Belonging
(% of respondents)



Since 2021, Diversity, Inclusion and Belonging has remained a priority for organisations, with over 80% of companies each year confirming it is a strategic or a top priority.

Some companies have moved from considering DIB a "strategic" priority to now considering it a "top" priority. Our research indicates that the interpretation of priority level can vary among companies, however some consider a short-term priority to be top, whereas others consider a long-term priority to be top. Regardless of specific definition, most companies find DIB vital.

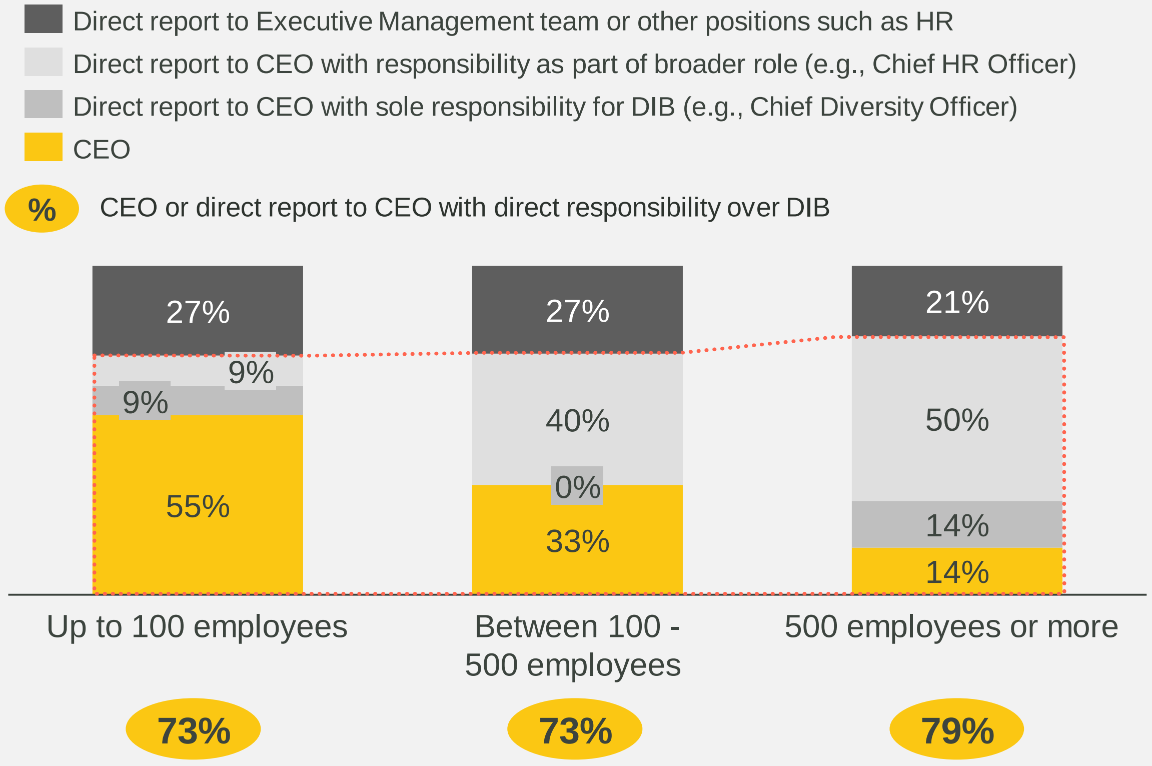
> *"It is a priority because we believe that having an organisation with a more diverse background will lead change. However, getting the support from leadership is key to be able to succeed."*
>
> ***Gina Perini, Chief of Board of Directors and CEO – Somos, Inc.***

In certain instances, companies now perceive DIB as seamlessly integrated into their operations and overarching strategies. Hence, there has been a four percentage point increase in the number of organisations that consider advancement in DIB to be part of their standard business practices.

Note: (1) Strategic priority (DIB is a long-term priority for the future of the business); Top priority (DIB is an immediate priority, with significant action being taken now).; Source: GLF Survey 2024
n = 42

70%+ OF COMPANIES, REGARDLESS OF SIZE, HAVE TASKED THE CEO OR A DIRECT REPORT TO THE CEO WITH RESPONSIBILITY OVER DIB

Fig. 11. Size of the organisation vs. who is the most senior person with direct responsibility over DIB in the organisation
(% of respondents)



In our research for this report, multiple companies reiterated that the journey towards diversity and inclusion starts from the top and, hence, successful DIB programs require leadership engagement. As such, it is positive to see that ~70% of organisations, regardless of size, decided to place the responsibility of overseeing DIB at a very high level of the organisation — either the CEO or a direct report to the CEO. This is key, as multiple organisations confirm that the path to diversity and inclusiveness can only be successful with leadership support, sponsorship and approval.

+8% **Increased progress on gender for companies with a CEO being directly responsible vs. the rest[1]**

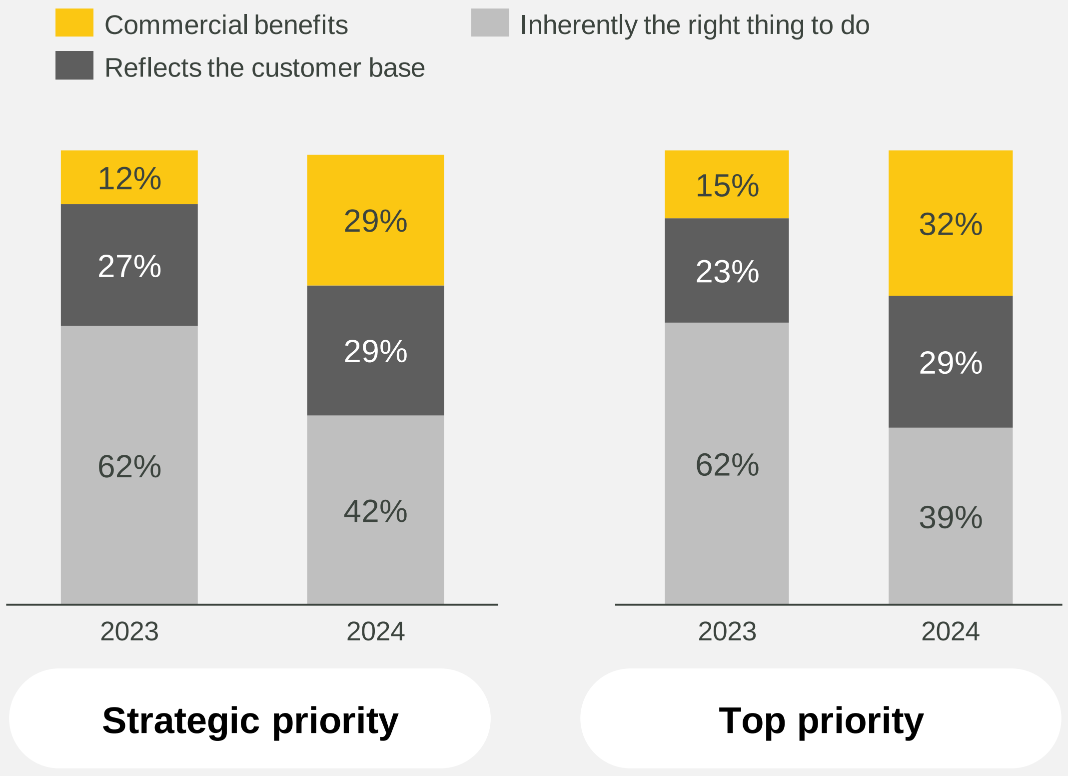
> *"In the organisation, we constantly discuss it and it is embedded in what we do. And as CEO, I personally believe in this balance and I constantly follow up on this personally."*
>
> ***Peter Van Burgel, CEO – AMS-IX***

However, the larger the organisation, the lower the frequency of CEOs having direct responsibility for DIB. This may be linked to the fact that the largest organisations will require larger efforts to drive diversity across the company, and thus the CEO may not be able to commit the time. Despite that, larger companies will also be the ones with the highest influence on the industry's progress on DIB given their policies and initiatives will have an impact over a larger number of individuals

Note: (1) Difference using average score calculated with 1 for "Not Started" and 5 for "Fully diverse"; Source: GLF Survey 2024 n = 42)

COMPANIES INCREASINGLY SEE MEASURABLE REASONS TO ADVANCE DIB WITH AN INCREASING NUMBER OF COMPANIES REPORTING COMMERCIAL BENEFITS

Fig. 12. What makes the overall concept of DIB important for organisations that consider DIB a strategic or top priority
(% of respondents)



Diversity can drive multiple benefits for organisations. It improves innovation, helps with recruitment efforts, leads to diverse perspectives, and increases productivity and performance.

A 2020 survey by Glassdoor found that 76% of job seekers and employees report that a diverse workforce is an important factor when evaluating companies and job offers. According to BCG, companies with more diverse management teams have 19% higher revenues due to innovation.

In the last year we have seen an increased number of companies considering DIB to be important because of the commercial benefits it offers. We have also seen an increase in the number of companies stating that diversity reflects the customer base; our qualitative research confirms companies are getting requirements from customers to be more diverse. Both the increase in the number of organisations seeing commercial benefits to DIB and the acknowledgement that diversity within a company mirrors the customer base can be seen as positive, as they show a higher level of understanding and awareness in the industry. Also, with tangible benefits associated to DIB, it is more likely DIB budgets will be protected by companies during times of economic pressure.

> "We want to imitate the customers that we are targeting. We understand and acknowledge what they are doing and we want to reflect the same in our end. If you do not have the same experience you will not sell as much"

> *"From our sales team we get a lot of requests on what our projects are in terms of DIB, They are getting feedback from our consumers on the fact DIB is relevant"*

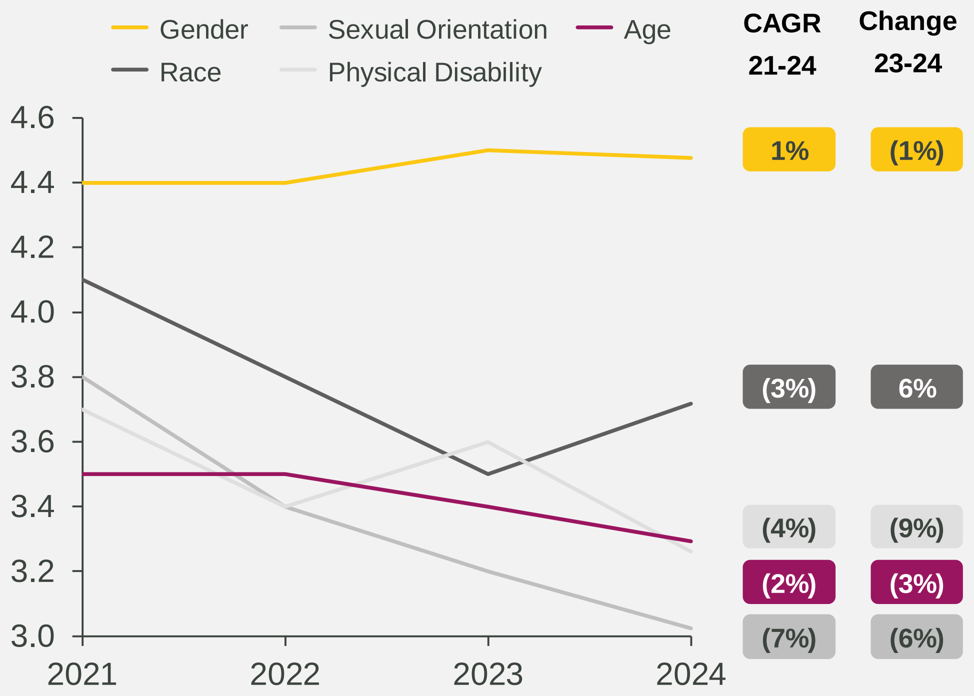
Source: Glassdoor Diversity & Inclusion Workplace Survey, BCG How Diverse Leadership Teams Boost Innovation, GLF Survey 2024 n = 42

02

MEASURING THE INDUSTRY'S PROGRESS ON DIB

THE CONSISTENT HIGH FOCUS ON GENDER, WHILST OTHER METRICS SHOW LOWER OR REDUCING FOCUS, HIGHLIGHTS THE IMPORTANCE OF DIB BEING MEASURABLE, VISIBLE AND PUBLICLY REPORTED

Fig. 13. What is the focus level within the company on different DIB dimensions
(% of respondents, avg score based on scale of 1-5 with 5 being highest)



Despite DIB being a priority for 80%+ of companies, except for gender, the average focus is scored below four out of five and have been decreasing over time. When stating DIB is priority for a company, not all DIB axes are considered as such. Despite 90% of companies give high focus[1] to at least one DIB metric in 2024, most give relevance to gender, followed by race.

Research for this report identified that companies decide on the prioritisation of diversity components through several approaches:

1. Multiple companies mention the need to publicly report their metrics for both gender and race. Hence, they mention that failure to drive diversity in these metrics may have a negative commercial impact.
2. Companies seek results from their investments. Hence, tangible and measurable components that can legally[2] be collected, or do not affect the ability to perform, are more likely to be targeted. To be able to measure, it's necessary to be aware of who classifies for each category, which is why metrics such as sexual orientation are less targeted.

> *"You need to be careful with the legal implications of some dimensions. For instance, on LGBTQ or on neurodiversity it is tricky to identify the people that belong to that group. In the Netherlands, there is a lot of restrictions on privacy which can hinder our efforts. What we do to still advance is take a bottom-up approach.*

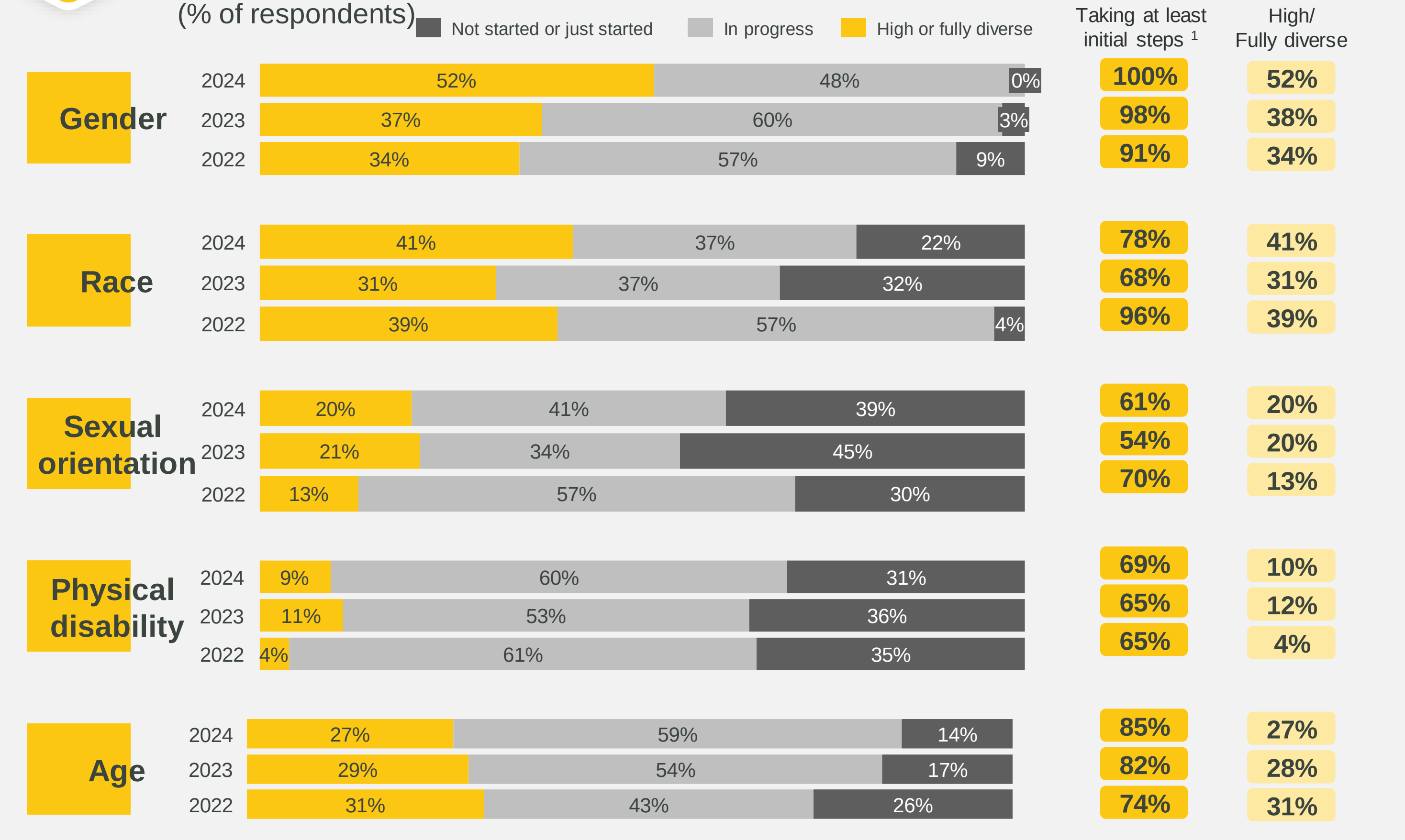
> *"The idea is that if one dimension is very minor or non-existent we should not be focusing on it. With women, it is incredibly clear but with sexual orientation it is not because we lack the data. Hence, it is very difficult to push the diversity in this dimension forward"*

Note (1) High focus includes values of 4&5 in a scale of 1-5, with 5 being the highest value (2) In Australia, 100+ employees must report their gender equality data to WGEA annually; in South Africa it is an appoint system and it drives commercial benefit to demonstrate diversity in gender and race; in the EU, quotas have been set for women representation in company boards (3)Due to GDPR regulations there is some information that can not be collected as it is the case of France (you can not collect race or religion data);; Source: GLF Survey 2024 n = 42; Reuters, WGEA, Interviews

EACH DIB METRIC HAS AT LEAST 61% OF COMPANIES STATING THAT THEY ARE TAKING ACTION; OVER 50% OF COMPANIES SELF-DEFINE AS HIGH OR FULLY DIVERSE WITH RESPECT TO GENDER, UP FROM 38% IN 2023

Fig. 14. What is the progress level within the organisation on different metrics of DIB

(% of respondents)



Gender has remained the focal point of diversity efforts across organisations to the extent that all companies now report some progress driving diversity, which is indicative of a sustained commitment over time.

Focus on race, which was high after the murder of George Floyd and subsequently decreased, is now returning. With multiple companies stating the need to publicly report on this metric, we can expect it will maintain a high level of focus over time. When it comes to the remaining elements of DIB, there is a high level of progress on age despite the low focus. However, companies report that age diversity is driven naturally mirroring a lifecycle of career progression and product alignment within the industry (e.g., voice usually has more mature user-base than messaging).

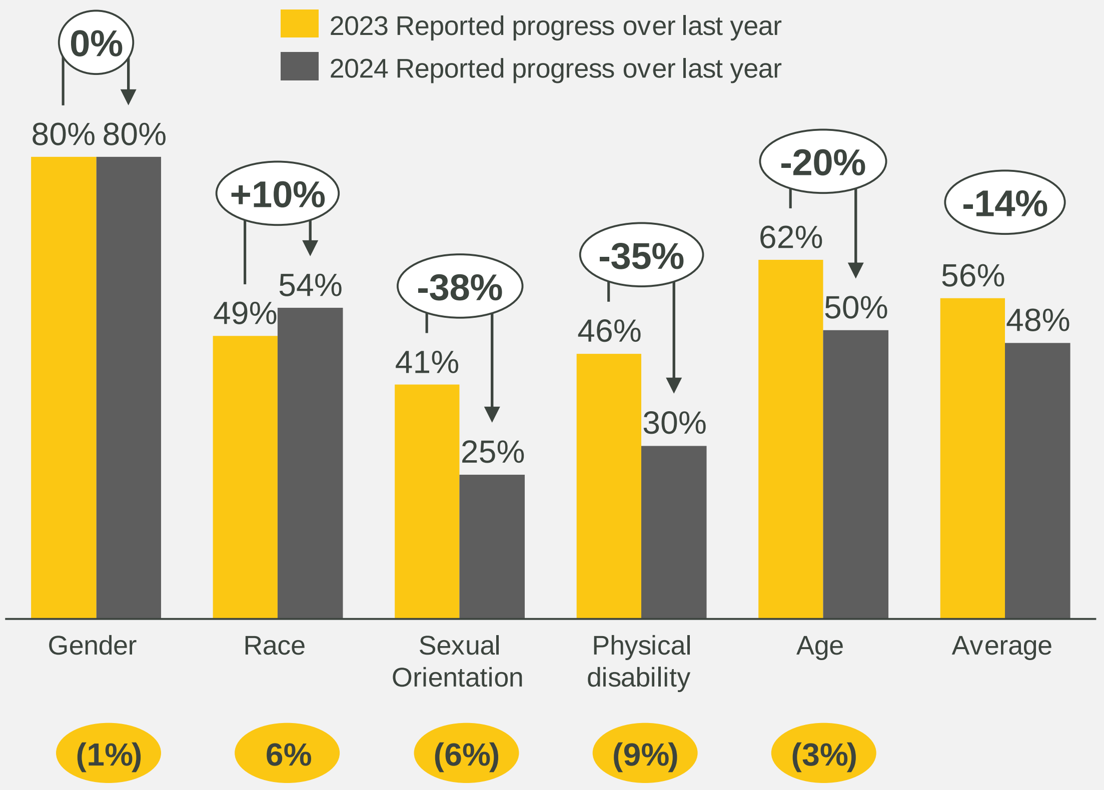
Despite some progress being made on sexual orientation and physical disability, we can agree the level has been lower. Partially this derives from the lack of visibility and measurement for sexual orientation and the potential impact on job performance for physical disability.

> *"Despite we have targeted efforts in all axis we usually have more DIB focus in two axis which this year have been gender and neurodiversity. The last, because we had not done much efforts in the past"*

Note (1) Considers in progress, highly diverse and fully diverse; Source: GLF Survey 2024 n = 42

HOWEVER, WITH THE EXCEPTION OF RACE, LESS ORGANISATIONS ARE REPORTING PROGRESS THIS YEAR VS LAST

Fig. 15. % Companies confirming a slight or significant increase in progress in the last 12 months
(% of respondents)



In the past year, the average decrease in terms of focus for all DIB dimensions saw a dip in advancement compared to the previous year, notably in areas such as sexual orientation (38%), physical disability (35%) and age (20%), where multiple companies have decided to decrease the focus over the past year.

The lower advancement on sexual orientation could be explained by two facts. First, in 2023 there were still 64 countries with laws criminalizing homosexuality; some others, such as France, prohibit processing information related to private life, which includes sexual orientation. Adding to that, this metric is not as visible as gender or race, which is key for measurement and progress.

With physical disability, lower advancements can be explained by the higher efforts required to target it. Besides the initiatives that other DIB measures require to move forward (such as mentoring, an inclusive culture or a targeted recruiting), physical disability as a category may also need to be targeted with better wellness benefits, physical infrastructure accommodations or facilities to see employees self-identify as having a disability[1].

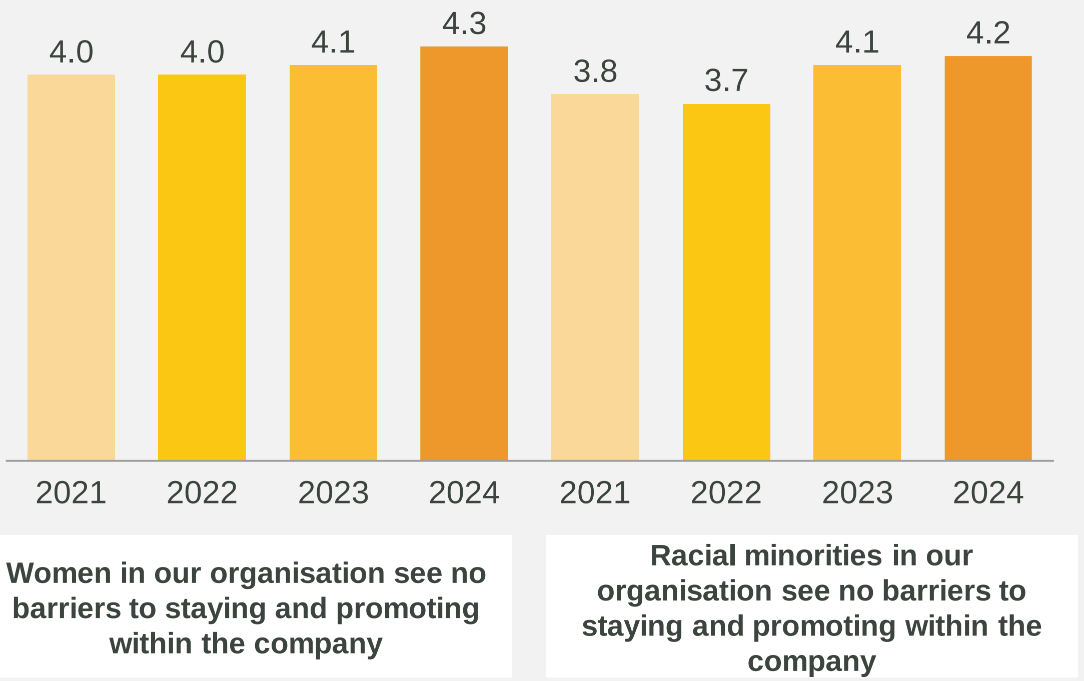
On age, despite the decrease in focus, progress has not faltered as much. Multiple companies confirm this is driven by natural demographic shifts as younger employees come aboard and older ones retire.

> *"Age is happening naturally. As for the lower focus on some dimensions, this is partially due to the fact we need to get data as our guide. We have data on gender and race but we do not have it for some of the remaining dimensions, The initiative now is to ensure an environment where people can self-identify."*

Note: (1) This will also affect sexual orientation but not gender or age. Source: BBC; Disability IN; GLF Survey 2024 n = 42

COMPANIES ARE STATING CONSISTENT PROGRESS IN REDUCING BARRIERS TO RETAIN AND PROMOTE TALENT FROM DIVERSE BACKGROUNDS

Fig. 16. % of companies believing the following statements are consistent with their organisation
(Average score from 1-5, with 5 being highest level of alignment)



The increase in the average score of companies believing there are no gender or racial barriers to staying and being promoted within the company can be seen as positive, indicating there is on average a perception of lower barriers. However, it is still in progress, as during our qualitative research organisations have confirmed both woman and other minorities are still facing some barriers.

However, there is always room for improvement, which can start by continually reviewing metrics and obtaining employee feedback to look for areas of improvement.

> *"We discovered a higher attrition for women to men, and the survey feedback collected mentioned it was due to less opportunities to advance. In fact, it was because women usually occupied roles that were less technical and had a lower level of promotions. After the discovery, we are trying to cross-pollinate positions to tackle this barrier."*

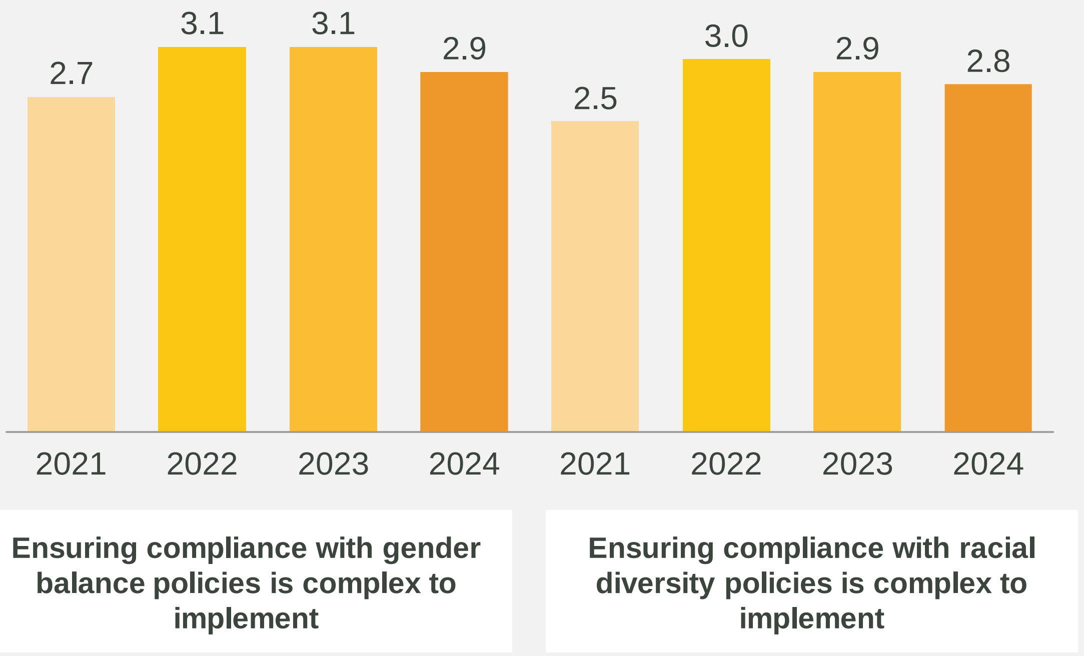
Nevertheless, with advancements on gender and race, companies should also ensure the right culture and policies are in place to develop and retain talent. Otherwise, people will leave sooner or later, taking companies back to the starting point in terms of diversity.

> *""Women want to work in companies with a culture and arrangements that work for them. If they do not find it, a lot of them drop, so it is not only about hiring people that are diverse but also about retaining them."*
>
> ***Michaela Jeffery-Morrison, Founder & Mng. Director – Women in Tech***

Source: GLF Survey 2024 n = 41

INCREASED LEADERSHIP SUPPORT, FLEXIBILITY AND DIVERSITY ARE FACILITATING THE IMPLEMENTATION OF GENDER AND RACE POLICIES

Fig. 17. % of companies believing the following statements are consistent with their organisation
(Average score from 1-5, with 5 being highest level of alignment)



Companies found that ensuring compliance with gender and racial diversity targets was complex after new regulations and policies were established between 2020 and 2022

On gender, the U.S. government launched its first National Strategy on Gender Equity and Equality in October 2021, and in 2022 the European Commission launched a directive on gender balance in company boards. On race, multiple measures were taken subsequent to demonstrations that occurred worldwide after George Floyd’s murder in May 2020.

Difficulties in policy implementation, however, are revealed only after the policies are put in place. That said, companies confirm they are now seeing less complexity in implementation, owing to:

1. Diversity driving more diversity once the first steps have been taken;
2. Greater support from leadership, key to approving the required budgets and also to be the role models within the organisation;
3. Increased flexibility in working hours and work-from-home policies established during the COVID-19 pandemic.

> *After COVID-10, we offered an increased number of facilitations such as work from home which has now become part of the culture”*

Source: GLF Survey 2024 n = 41

03

A JOURNEY TOWARDS GENDER BALANCE AND INCLUSIVITY

KEY FINDINGS

The telco industry still needs work to bridge the gender equality gap: at the organisational level, female representation currently stands at ~36%. To advance, the focus must extend beyond recruitment to the retention of talent. Success in this area can be achieved by developing and maintaining an inclusive culture, underpinned by appropriate policies and initiatives, which will further enhance diversity across additional DIB dimensions.

05 **Policies and initiatives are key enablers to bridge the gender gap:** 85% of companies surveyed confirm they have at least one initiative to hire and retain female talent, and 95% have at least one policy in place to improve gender balance. However, experts confirm the necessity of providing multiple measures, not just to drive progress but also to sustain the progress achieved.

06 **Female representation at management level shows the greatest disparity and the slowest progress:** The gender gap intensifies at higher executive levels, with 26% of companies reporting <20% women at the executive level. Additionally, while 51% of companies have seen advancements at the management level, this compares to 63% at an organisational level — a 12 percentage point difference that highlights slower progress towards parity in leadership positions.

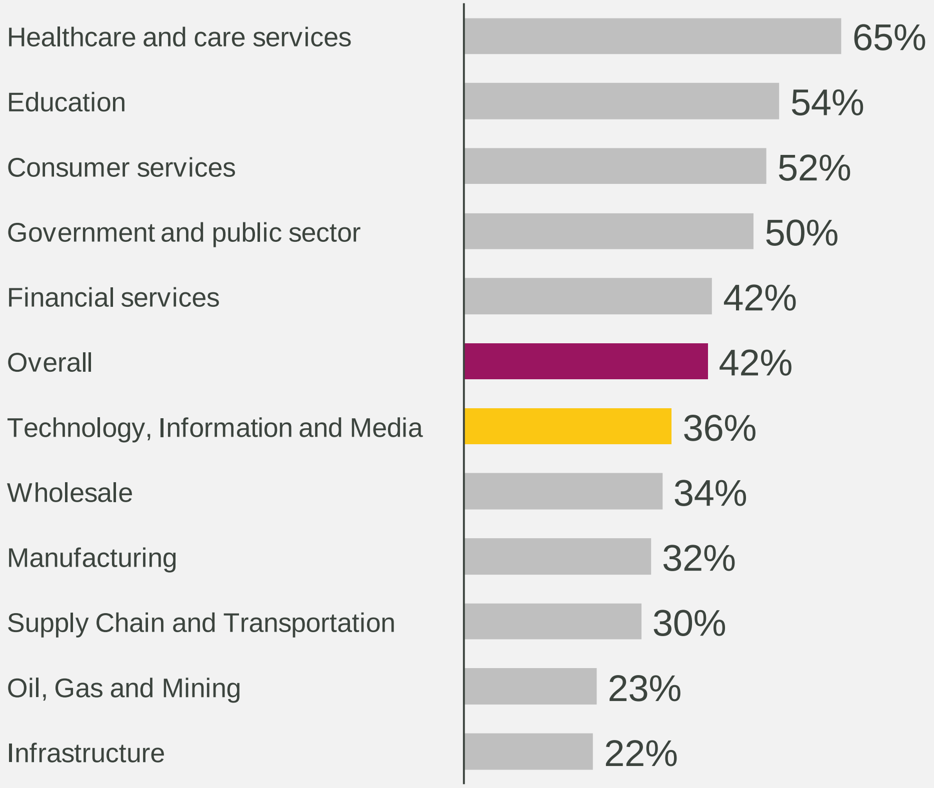
07 **Inclusivity is progressing:** There seem to be different interpretations of the meaning of inclusivity, but what cannot be denied is that 83% of companies assert they have made some level of advancement on the matter in the last 12 months.

08 **Tracking and measurement are vital:** The importance of tracking and measurement in DIB is underscored by the fact that 80% of organisations have confirmed their commitment to it. Qualitative research confirms the actual number is even higher when accounting for those that utilize informal tracking and measurement methods.

03 A JOURNEY TOWARDS GENDER BALANCE AND INCLUSIVITY

DESPITE PROGRESS IS BEING MADE, THE TELCO INDUSTRY STILL HAS SIGNIFICANT GENDER BALANCE GAP, WITH WOMEN REPRESENTATION STANDING AT ~36% VS MEN

Fig. 18. 2023 share of parity reached by industry
(%))



Qualitative research conducted for this report identified that the telecom's industry is ranking below the average in gender parity due to mainly two factors factors:

1. Attractiveness of the industry
2. Culture of the industry

First, the telecommunications industry is a highly technical field, requiring specialised knowledge and skills in areas such as network engineering, software development, or systems integration. These sectors have traditionally seen, and still see, lower enrollment rates from women in relevant educational programs. As examples, the University of Waterloo in Canada reported that only 18% of students enrolling in its computer science program for the 2021-2022 year were women, and the 2023 WEF gender parity report confirms there is not only a lower percentage of women entering STEM[1] studies, but also higher attrition rate even one year after joining the workforce.

Second, the industry has long been perceived as male-dominated. In these cases, female colleagues can sometimes be left out of social events, asked to take responsibilities for jobs related to their gender identity such as receiving guests or designing promotional materials or can be victims of sexist actions which can make female workers feel unsafe when most of their colleagues are male[2].

Although we have seen that the industry is making efforts to reverse the situation, the technicality of the industry is still there and the barriers to entry are still high. Additionally, qualitative research confirms that despite a higher number of females are enrolling in universities for a technical degree those percentages are not cascading down into the labour market, partially due to the higher attrition from females compared to men, specially in more senior positions.

> *"Women are generally less attracted by the industry, partially due to its technicality. We have phenomenal women in the industry but the entry barriers are still very high."*
>
> ***Marisa Trisolino, CEO – CMC Networks***

Note: (1) Science, Technology, Engineering and Mathematics. (2) United Nations ESCAP: The Future is Equal: Gender Equality in the Technology Industry; Source: World Economic Forum; University of Waterloo, Canada; GLF Survey 2024 n = 42.

03 A JOURNEY TOWARDS GENDER BALANCE AND INCLUSIVITY

COMPANIES ARE WORKING TO BRIDGE THE GENDER GAP, WITH 85% OFFERING AT LEAST ONE INITIATIVE TO HIRE AND RETAIN FEMALE TALENT AND 95% WITH AT LEAST ONE POLICY IN PLACE

Fig. 19. Current existence of initiatives to hire and retain females within organization

(% of respondents confirming existence)

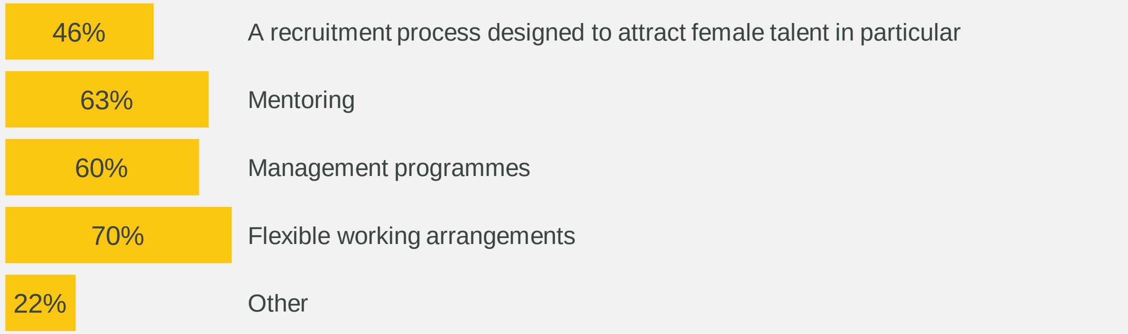
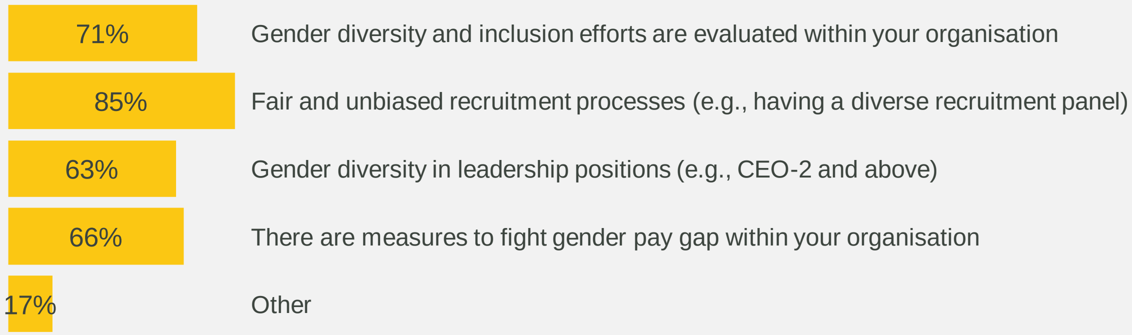


Fig. 20. Existing policies within organisation to improve gender balance

(% of respondents confirming existence)



Aside from the gender balance barriers specific to telco, such as the high technicality or the industry being male dominated, there are multiple barriers that affect gender parity across all industries. According to IMD, barriers such as unequal pay, gender stereotyping and fewer promotions make it difficult to bridge the gap. Hence, companies must put in place policies and initiatives to combat these barriers.

Within this context, it is positive to see the varying initiatives and policies launched by companies, as they are a sign of the effort that is being made across the industry to address gender disparities.

Among the potential initiatives, roughly 70% ensure they offer flexible working arrangements such as maternity leave or shorter work hours for childcare. Mentoring is available at 63% of companies, but in many cases it is extended organization-wide, not just to women.

On the policy side, most companies mention they ensure a fair and unbiased recruitment process is in place. However, to do so, they have mentioned the need to innovate in recruiting efforts to gain access to a more diverse pool.

Companies with at least one initiative to hire and retain females

Companies with at least one policy to improve gender balance

Source: IMD Gender inequality in the workplace: factors, and how to combat it; GLF Survey 2024 n = 41

03 A JOURNEY TOWARDS GENDER BALANCE AND INCLUSIVITY

THE GREATEST DISPARITY IDENTIFIED IS THE REPRESENTATION OF WOMEN IN LEADERSHIP, WHICH SHOWED LOWER IMPROVEMENT IN THE LAST 12 MONTHS THAN THE BROADER ORGANISATION

Fig. 21. Perceptions on gender disparity within the organisation

(% of respondents confirming existence)

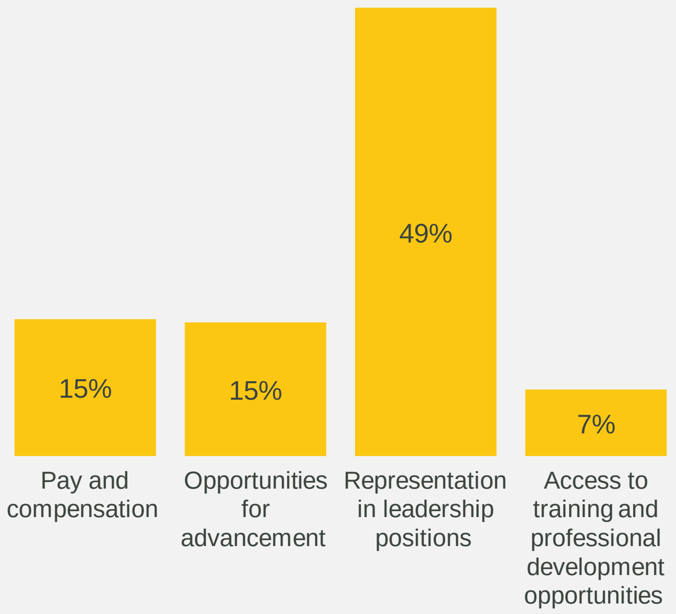
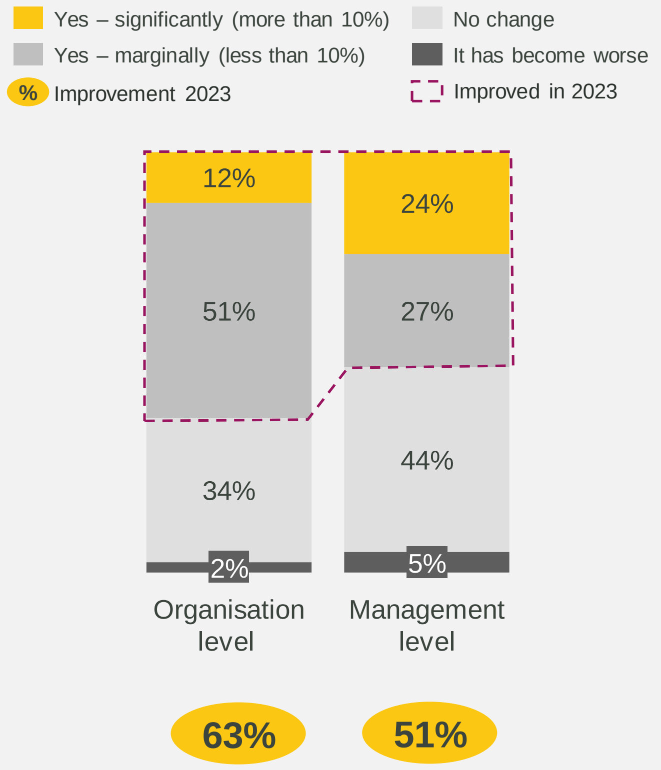


Fig. 22. Gender balance improvement in the last 12 months

(% of respondents)



Joint efforts on both policies and initiatives are bringing results, but 7% to 15% of survey respondents still perceive disparities in pay and compensation, opportunities for advancement, access to training, and in professional development opportunities. However, the highest disparity is seen in women's representation in leadership ranks, with 49% of survey respondents perceiving disparity in representation at that level.

> *"We are not there at the executive level, but we have succession planning to ensure we can bridge the gap. We are working on having an internal pipeline to promote*
>
> ***Roary Stasko, CEO – Telstra International***

Additionally, there is lower progress towards gender balance in leadership roles, with 63% of companies reporting improvements at the organisational level but only 51% at the management level.

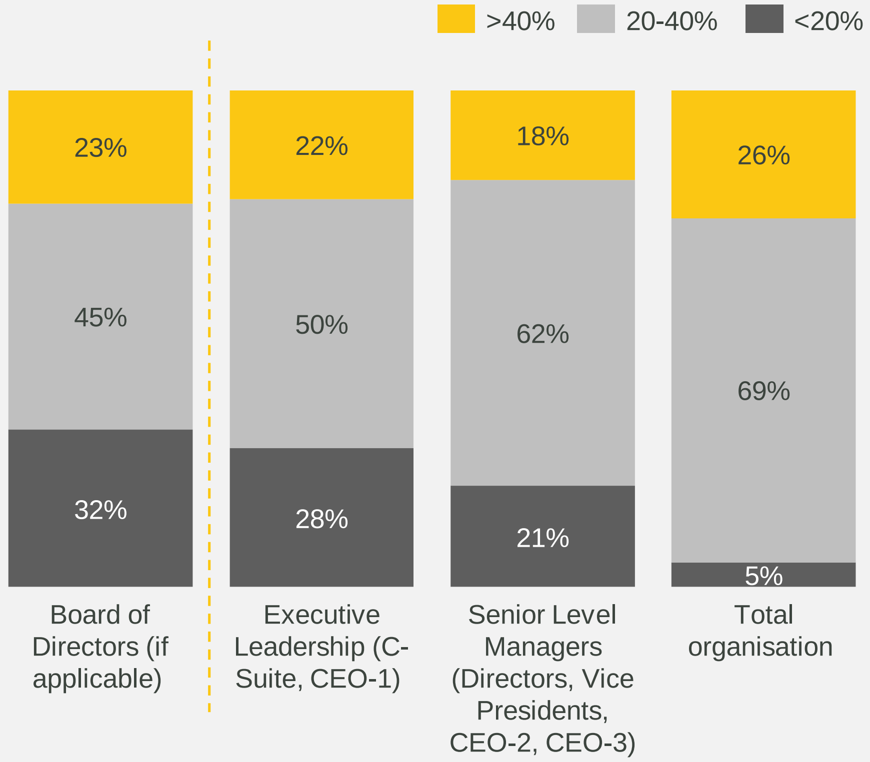
Hence, while efforts should continue on workforce diversity, efforts must escalate to cultivate female leadership. To address that, companies should not only focus on recruiting but also on developing the right culture and ensuring inclusivity across all levels of the organisation.

Source: GLF Survey 2024 n = 41

03 A JOURNEY TOWARDS GENDER BALANCE AND INCLUSIVITY

THE FEMALE REPRESENTATION GAP INTENSIFIES AT HIGHER EXECUTIVE LEVELS WITH 28% OF COMPANIES HAVING LESS THAN 20% WOMEN AT EXECUTIVE LEADERSHIP AND ONLY 22% REPORTING PARITY

Fig. 23: By seniority level, what percentage of the organisation is comprised of women?
(% of respondents)



The representation of women diminishes as we climb the corporate ladder. This includes the board of directors, which should be treated separately, as its level of parity does not necessarily need to be linked to the company's policies or its culture.

In fact, at the Board of Directors level, part of the progress has been driven by legislative actions such as those in Calilfornia[1], or the European directive requiring 40% female directors for large listed companies[2]. Additionally, some other legislation, such as the SEC-approved NASDAQ Board Diversity rules[3], have contributed to its progress, requiring disclosure of board-level diversity statistics.

At a company level, progress on gender balance is highly dependent on the organisation's policies and initiatives to address imbalance. During our qualitative research, we found that often there are not enough policies in place to address the unique barriers that women face.

> *"In the tech industry, the demanding nature of the work—long hours, extensive travel for example can pose significant barriers for women. While strides have been made with the implementation of policies to support women, there's still progress to be made before achieving true gender inclusivity."*
>
> ***Michaela Jeffery-Morrison, Founder & Managing Director – Women in Tech***

Additionally, despite the efforts on policies and on ensuring the right environment to retain women, some companies mention the small pool of female executives as a challenge which is heightened by the fact the industry requires technical skills for many roles. However, to solve this challenge, organisations should be open to moving beyond the traditional search method and should also focus on developing or creating and cultivating an active internal pipeline of female candidates, as some may take two or three years to cultivate.[4]

Notes: (1) Forbes: California law SB 826, which passed in 2018, requires publicly traded corporations headquartered in California to include at least one woman on their boards by 2019; (2) EU directive: 40% female directors by 2026, or female representation of at least 33% across the organisation; (3) Reuters: NASDAQ rules require companies to have one director who identifies as female, underrepresented racial/ethnic minority or LGBTQ+ by 2023; companies would generally need two directors from diversity categories to satisfy the rule by 2026; (4) Mentioned by John Thompson, Chairman of Microsoft. Source: McKinsey, how to accelerate gender diversity on boards; GLF Survey 2024 n = 41

03 A JOURNEY TOWARDS GENDER BALANCE AND INCLUSIVITY

COMPANIES REPORT A HIGH LEVEL OF INCLUSIVITY AND PROGRESS, BUT THERE ARE VARYING DEFINITIONS AND INTERPRETATIONS OF WHAT "INCLUSIVITY" MEANS

Fig. 24. What is the level of inclusivity companies believe they have

(% of respondents)

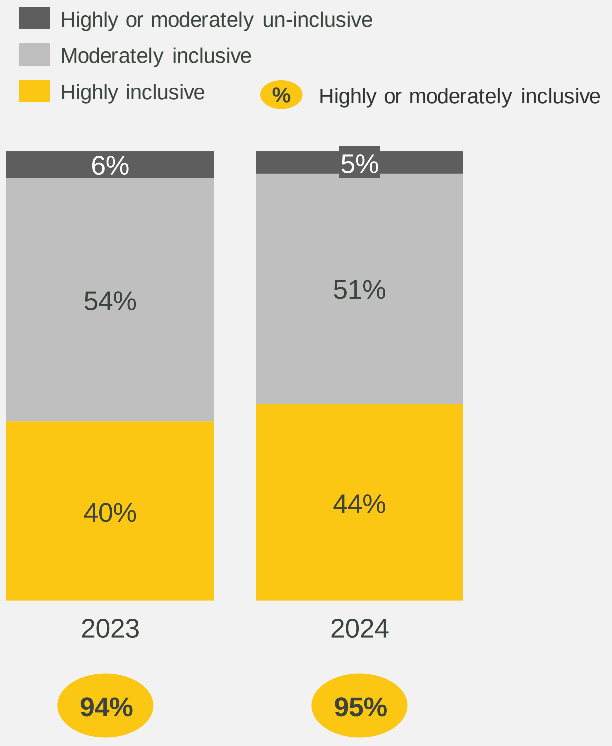
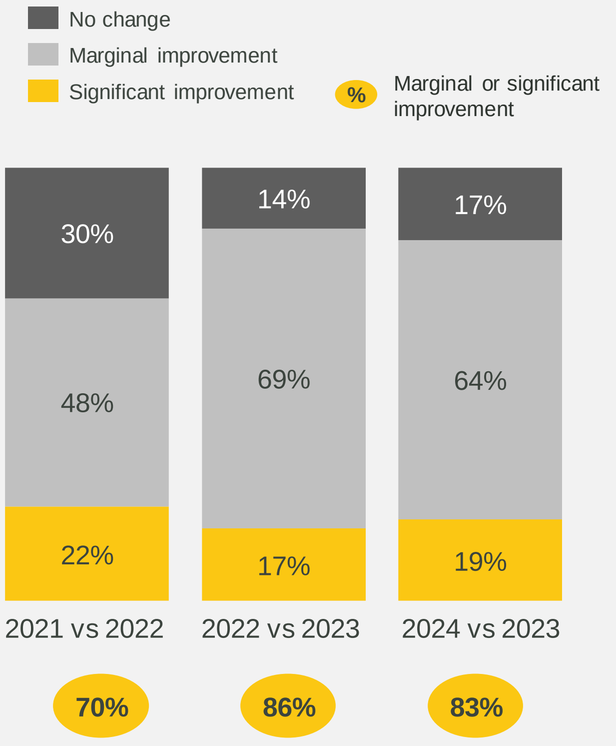


Fig. 25. What is the progress level within the organisation on inclusivity

(% of respondents)



We could say at first sight that there has been huge progress in inclusivity, with 95% of organisations reporting they believe they are moderately or highly inclusive and 80%-plus confirming some level of progress in that regard. However, what does inclusivity mean?

There are wide-ranging definitions of "inclusivity", and interviews showed that companies have differing interpretations: "we have inclusivity policies in place"; "we have positive feedback on the surveys we launch"; "we launch Gallup surveys to understand where people are"; and "we based it on regulation compliance".

Despite broad interpretations, most companies are taking steps towards ensuring inclusivity in the working environment. As a next step, all companies should track and measure inclusivity metrics to fully assess their progress, as inclusivity is the key to ensuring they can maintain the diversity they have achieved.

> *"Diversity is inviting everyone to the party, and inclusion is having everyone dance."*
>
> ***Gina Perini, Chief of Board of Directors and CEO – Somos, Inc.***

Source: GLF Survey 2024 n = 42

03 A JOURNEY TOWARDS GENDER BALANCE AND INCLUSIVITY

80% OF COMPANIES MEASURE GENDER DIVERSITY AND INCLUSION BUT THE DEBATE CONTINUES ON THE APPROPRIATENESS OF TARGET SETTING

Fig. 26. Does your company track and measure gender diversity and inclusion?
(% of respondents)

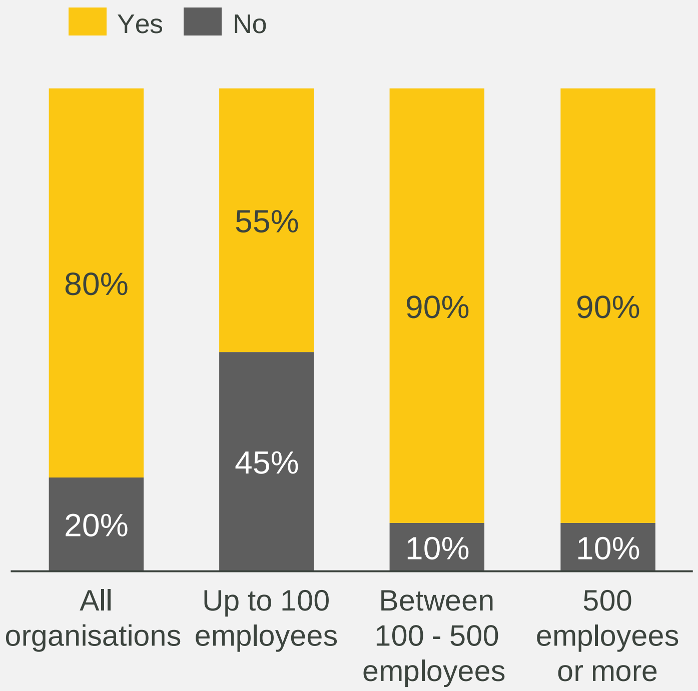
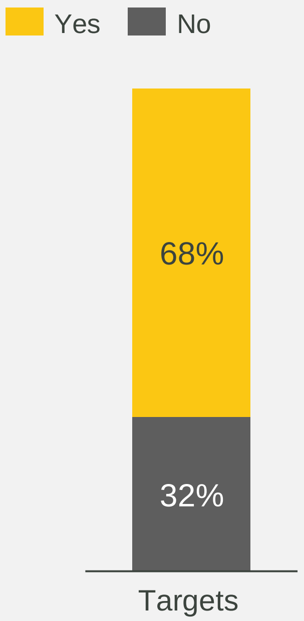


Fig. 27. Does your company have targets towards gender diversity and inclusion?
(% of respondents)



Despite 100% of companies reporting that DIB is a priority or business as usual, only 80% track and measure progress; for smaller companies the figure drops to 55%.

In speaking to organisations, we understand there is a mixture of formal and informal processes used to track progress. Whilst the majority of companies seek digital platforms to automate the tracking of diversity, the cost can be prohibitive for smaller companies.

Nearly 70% of companies have gender diversity and inclusion targets, which showcases commitment to change. However, the subject of targets is complex. In July 2023, U.S. attorneys of 13 states issued a warning to the CEOs of Fortune 100 companies threatening "serious legal consequences" over race-based preferences and diversity policies[1], and at least six major U.S. companies modified policies or prohibited targets meant to boost racial representation after that[2]. Furthermore, some experts believe targets may hinder true diversity and inclusion, as they may overlook individual qualifications and even obscure the value of obtaining true diversity and inclusion.

"We collect data with two different goals in mind. The first is a data-driven understanding of where we are when it comes to diversity and inclusion. The second is to understand from our employees directly how they feel about how we're measuring up in creating opportunities for all. Based on that data, we launch targeted initiatives that continue to push us forward. While we don't adhere to targets, we are creating an inclusive and diverse environment that provides opportunities for all

Jennifer Parkhill, Sr. Director Strategy Execution, Program Management – Verizon

Notes: (1) Politico and Gibson Dunn, Claims; (2) Notably, the Lawyer's Committee for Civil Rights Under Law later defended workplace DIB efforts and urged companies not to retreat from their DEI efforts. Source: GLF Survey 2024 n = 41

04

THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

KEY FINDINGS

Neurodiversity should be recognised as a key dimension for DIB, given that 14% of the global population[1] is considered to be neurodiverse. There is still low understanding and awareness of what neurodiversity is, however. Similarly, the potential applications of artificial intelligence for DIB purposes are not widely known. This, combined with tight budgets and ethical concerns about the use of AI, is resulting under-utilization at present.

09 **Low levels in the DIB metric for neurodiversity derive from low focus:** So far, only 7% of companies perceive themselves to be highly or fully diverse in this DIB component, and most of the firms have reported low focus and either no change or a very slight increase in focus over the past 12 months. Based on our qualitative research, this is related to limited budgets and less awareness and understanding of this DIB metric compared to others such as gender, race, or physical disability.

10 **Monitoring of advancements is key:** Approximately one-quarter of firms have increased focus, however, and 35% have reported some level of progress during 2023. In the future, it will be key to monitor advancements as awareness and understanding of neurodiversity increase.

11 **AI is not yet a priority for advancement of DIB:** Despite multiple companies using AI to enhance business operations, only 18% are currently using or plan to use AI for DIB purposes, and roughly half of the survey respondents feel indifferent about its uses. This derives from ethical concerns about use of AI, budget constraints, and low understanding of the potential uses of artificial intelligence.

(1) According to Disability IN: Neurodiversity @Work employer roundtable

04 THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

IT IS ESTIMATED THAT ONE OUT OF SEVEN PEOPLE HAVE SOME TYPE OF NEUROLOGICAL DIVERSITY

Enhanced inclusivity *Boost company performance*

WHAT IS NEURODIVERSITY ?

Very simply, neurodiversity refers to the different ways a person's brain processes information

Cambridge University Hospitals NHS Foundation Trust

The diversity of human brains and behaviors, proposing that neurodevelopmental conditions like autism, dyslexia and ADHD are natural and valuable variations of human neurology, rather than deficits"

Encyclopedia Britannica

1 in 7 people are neurodivergent

Although we are describing neurological differences[1] that diverge from the dominant societal standards of "normal", being neurodiverse does not correlate with low intelligence, In fact, many people with neuro differences are highly intelligent. People who are neurodiverse often think about and see the world differently, making this a huge asset to any organisation that wants to improve how it operates.

In fact, there are multiple benefits for companies if they are capable to recruit, support, and integrate neurodiverse talent. But this requires developing the right capabilities within the organisation as neurodiversity is like different operating systems which need to operate alongside one another. You will need to ensure the interoperability between them to ensure the organisation runs smoothly.

POTENTIAL BENEFITS

Employee retention (Enhanced inclusivity)	Microsoft, SAP, JP Morgan Chase and EY – which run four of the largest U.S neurodiverse hiring programs report a retention rate of +90% [2]
Employee engagement (Enhanced inclusivity)	Organisations that have implemented programs targeting neurodiversity found that neurotypical employees who work in areas of the business that neurodiversity programs touch felt that "involvement makes their work meaningful and their morale higher"[3]
Talent attraction (Enhanced inclusivity)	2022 Glasdoor study found that DEI matters for the majority of employees and job seeks across age groups. Hence more diverse environments will drive more diversity[4]
Financial performance (Boost company performance)	Siemens found that neurodivergent employees can increase productivity by nearly 50%, and JP Morgan Chase found that their neurodivergent new hires were 48% more productive than neurotypical experienced colleagues. This increased productivity results in increased profits.[5]
Productivity and innovation (Boost company performance)	Multiple organisations including JPMorganChase or the Australian Federal Government have reported an increase in productivity which can range from 30% to over 50% for neurodiverse teams compared to neurotypical teams[5]

(1) Can include (but not exhaustive) Autism, dyslexia, attention deficit hyperactivity disorder, dyspraxia, dyscalculia, dysgraphia; (2) People Management: Neuroinclusion at work: learning from a global study (3) Culture Amp: Neurodiversity in the workplace: Why it matters; (4) Glassdoor 2022: Who cares about diversity, equity and inclusion? (5) Lexxic: Why embracing neurodiversity in the workplace is good for business; (5) JP Morgan Chase Austism in Work program; Australian Water Association. Neurodiversity: The untapped solution to the future of the water industry; Source; GLF Survey 2024 n = 42

04 THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

NEURODIVERSE EMPLOYEES REQUIRE SPECIFIC CONDITIONS TO THRIVE WITHIN THEIR COMPANY

NEURODIVERSITY PLAYBOOK[1]

The Neurodiversity Playbook is a guide on how to cultivate and reinforce a neuroinclusive culture. It was published by the Neurodiversity at Work Employer Roundtable (Disability:IN Committees), which is a collection of employers committed to neurodiversity-focused hiring initiatives which includes companies such as IBM, salesforce, SAP, DELL Technologies, WB, EY or JP Morgan Chase among others.

Their goal is to welcome neurodivergent employees into the workplace, recognise and promote their strengths and be aware of their unique needs.

For that, they provide resources to other companies who are interested in driving neurodiversity to facilitate its first efforts or help connect neurodivergent candidates to roundtable employers among others.

Disability:IN

Neurodiversity @ Work Employer Roundtable

01 **Be clear on why neuroinclusion matters to your organisation**
Reinforce neuroinclusion values and expectations through an explicit communication strategy and articulate what a neuroinclusive culture looks like and how it adds strategic value.

02 **Secure and make public the executive support for neuroinclusion**
Ensure ongoing executive engagement in partnership with the neurodiversity community and encourage and communicate executive use of flexible arrangements or supports to normalize these benefits to all employees.

03 **Leverage the strengths of your current organisational culture**
Identify and reinforce values and norms that align with the neurodiversity principles of inclusion and demonstrate how neuroinclusion is a form of such values and further strengthens them.

04 **Ensure capacity to operationalize neuroinclusion in work practices**
Operationalise neuroinclusion in the organisation’s structure and control systems, (including recruitment, promotions and annual reviews), train managers to be neuroinclusive, educate and empower employees for neuroinclusion.

05 **Follow your neurodistinct employee’s lead**
Create feedback channels for neurodivergent employees to identify areas for improvement, collaborate with and amplify Resource Groups’ values, advocacy efforts , and existing activities to amplify values of neuroinclusion.

06 **Identify and address norms and practices counter to neuroinclusion**
Assess cultural values and norms and identify those in conflict with neuroinclusion, reframe problematic value sand norms to ground them in neurocinsluion, provide safe spaces for neurodiverse employees.

(1) Examples in the playbook are not exhaustive, for further details you can visit Neurodiversity @ Work Playbook from DisabilityIN; Source Neurodiversity Hub, GLF Survey 2024 n = 42

04 THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

SOME INITIATIVES TO DRIVE NEURODIVERSITY HAVE BEEN LAUNCHED ALREADY

REAL-CASE EXAMPLES OF INITIATIVES LAUNCHED

Launched a training for Neurodiversity Acceptance (completed by 13,000 IBMers by 2023), held multiple events and launched executive programs to build awareness and increase acceptance.

IBM

"We have flexible working policies. For some neurodiverse individuals the option for virtual work is particularly beneficial as it allows them to tailor their home environment to accommodate their specific needs"

Roary Stasko, CEO – Telstra International

Launched the Business Solutions Teams to match people with intellectual and development disabilities and other forms of neurodivergence to jobs that fit their unique abilities and skills.

JPMorgan Chase & Co.

"There are people who need more time to think, something that can help to have a more inclusive culture in terms of neurodiversity is sending things in advance of meetings to facilitate contribution"

Gina Perini, Chief of Board of Directors and CEO - Somos, Inc

Launched an Autism Hiring Program specifically created to provide autism people with a less stressful environment than the traditional interview process.

Microsoft

"We are putting on a campaign to see what we can improve on, if managers need training, if people need specific conditions…. We will also have an online event to enable employees to share experiences so we can learn what can be improved"

Alec Cochrane, D&I Director, EXA Infrastructures

Several companies globally have initiated programs specifically aimed at supporting the neurodiverse community, with pioneers like IBM leading the charge with a program dating back over a decade. However, our qualitative research has revealed that certain companies within the industry are already making strides in this diversity, inclusion, and belonging dimension. Some have initiated campaigns to assess areas for improvement regarding neurodiversity within their organization, while others are actively implementing measures to foster a more inclusive work environment for neurodiverse individuals.

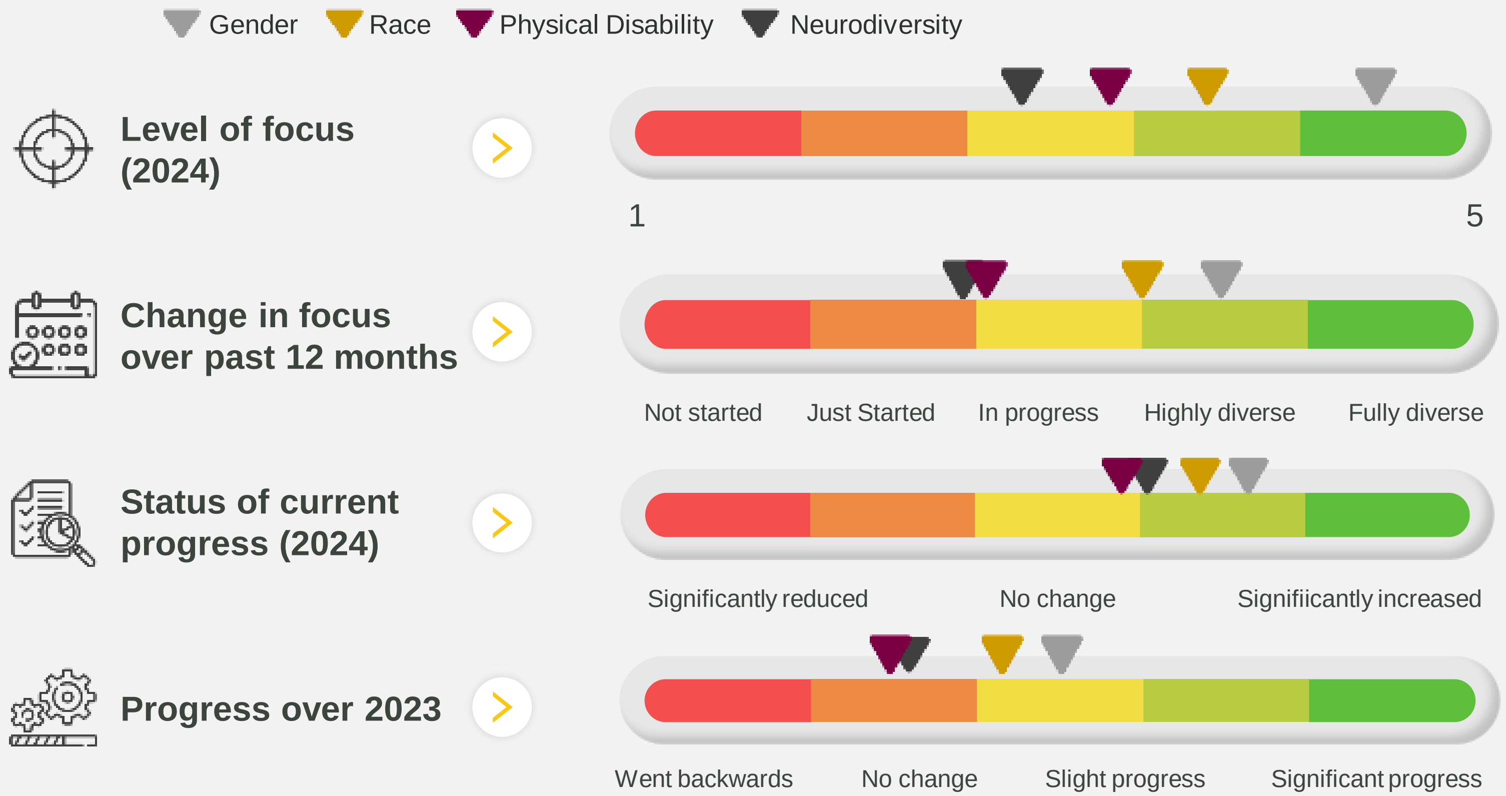
Source Neurodiversity Hub, IBM GLF Survey 2024 n = 42

04 THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

HIGHER FOCUS, AWARENESS AND PROGRESS IS REQUIRED TO BECOME NEURODIVERSITY INCLUSIVE

Fig. 28. Level of focus and progress within organisations with regards to Neurodiversity

(Average score of respondents with lowest level ranking 1 and highest ranking as 5, except for progress over 2023 running from 1 - 4)



Current focus on diversity is not high but it has reported to be very slightly increasing over the last 12 months.

If we look at current level of progress, we will the industry is currently far from considering itself inclusive, with only 7% of companies considering themselves highly or fully inclusive in neurodiversity.

However, we see as positive that there are 35% of companies that have confirmed some level of progress in 2023 which indicates the industry is at least slowly advancing.

27% **Organisations reporting an increase in focus over the last 12 months**

7% **Companies considering themselves highly or fully diverse**

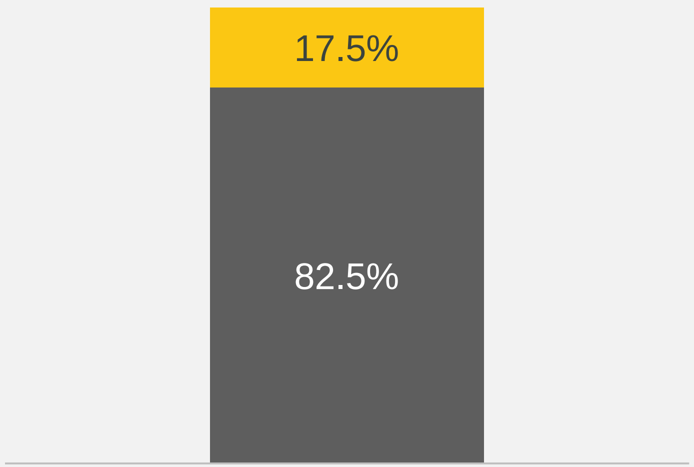
35% **Organisations reporting some progress during 2023**

Source GLF Survey 2024 n = 42

04 THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

WITH ONLY ~18% COMPANIES USING OR PLANNING TO USE AI FOR DIB, EVIDENCE SUGGESTS AI IS NOT YET A FOCUS COMPARED WITH USE-CASES IN OTHER AREAS OF A TELCO

Fig. 29. Organisations using or planning to use AI technology to accurately identify and mitigate potential DIB biases within the organisation
(% of respondents))



In a world where AI is increasingly being used by organisations to improve business operations and drive service innovation multiple companies have confirmed that, despite their use of AI, they are not yet using it to support DIB. This is for two primary reasons:

01

ETHICAL CONCERNS

As with any new technology, the path towards optimal utilisation requires multiple iterations to adjust, improve and de-risk it. Multiple companies confirm they are apprehensive about ethical implications that may derive from the use of AI for DIB purposes.

> *"AI, given its source of information, might unintentionally perpetuate certain biases or inequality by amplifying current biases that already exist in our society, particularly concerning women, people of color, marginalised ethnicities and overall negative stereotypes about people with differing backgrounds."*
>
> ***Eugene Pradas, Senior VP, Global Strategic Development – BTS***

02

LIMITED AWARENESS OF AI USE-CASES FOR DIB PURPOSES

Besides ethical concerns, multiple organisations are not prioritising use of AI to support DIB because they believe the only potential use would be within the recruiting area (e.g., virtual video interviews, CV reviews), which is exactly where ethical concerns must be truly addressed to avoid widening the gap.

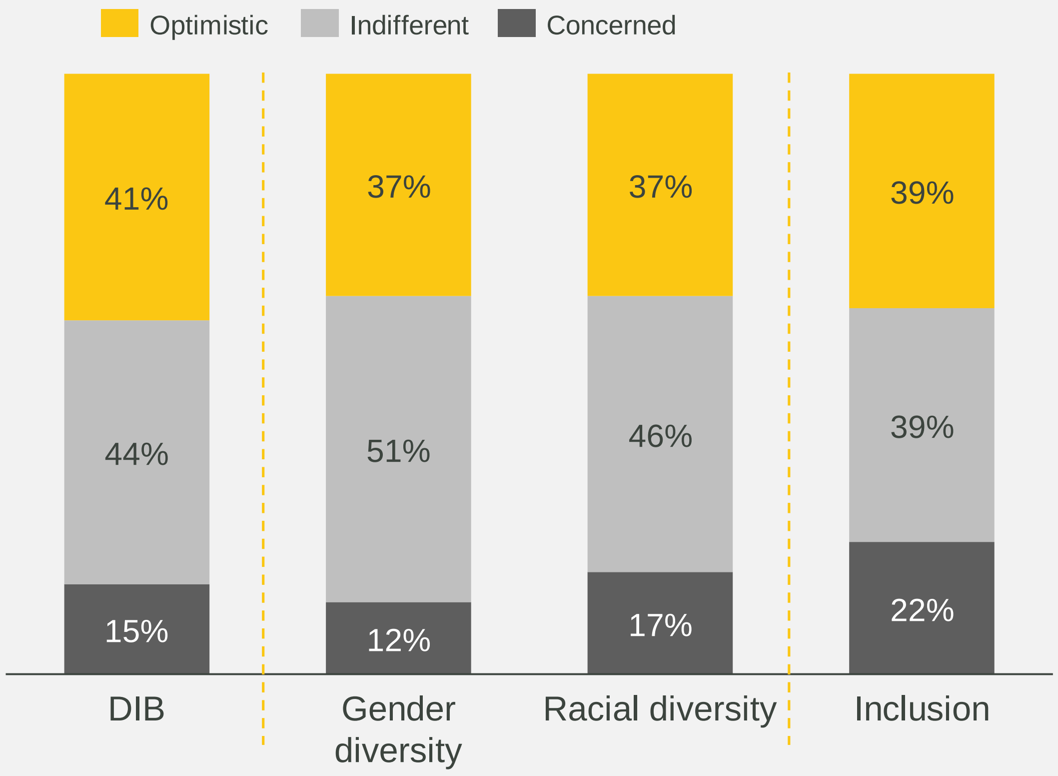
> *"I just feel indifferent because I do not feel AI can help find the right candidates, but would reconsider the use of AI if there are further benefits to it."*
>
> ***Marisa Trisolino, CEO – CMC Networks***

Source: GLF Survey 2024 n = 42)

04 THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

HOWEVER, 40% OF COMPANIES ARE OPTIMISTIC ABOUT THE POTENTIAL IMPACT AI WILL HAVE ON DIB, WHILE 45% REMAIN INDIFFERENT GIVEN CURRENT LIMITED AWARENESS OF ITS POTENTIAL USE CASES

Fig. 30. Opinion about the potential impact AI will have on the following:
(% of respondents)



Despite the low percentage of companies currently using or planning to use AI to mitigate potential biases, roughly 40% of organisations feel optimistic about its future impact.

This is because despite the current concern on the potential perpetuation of current biases or inequalities if AI is used for DIB purposes, companies are optimistic that organisations and technology will evolve over time to be able to successfully leverage from the potential benefits AI can provide without widening the inequality or diversity gap.

However, looking more closely at concerns about potential inequalities, we see that the metric where there is a higher number of concerned interviewees is inclusion, with 22% compared to 12% and 17% for gender and race.

> *"We are concerned because we believe there are a lot of biases which can reinforce what is already there with the use of AI. However, we feel optimistic that these issues will be solved in the future, opening a door of opportunity for its use"*
>
> ***Cath Doyle, Chief Experience Officer - Symbio***

Besides the optimism and concerns, there is roughly 40% to 50% of companies that feel currently indifferent about its potential impact. Interviews with telecoms executives for this report identified that orgainstions are not yet conscious or aware of the wide range of benefits AI an offer to improve the gender gap or the sense of inclusivity.

Source: GLF Survey 2024 n = 42

04 THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

AS A NEXT STEP TOWARDS USING AI FOR DIB ENHANCEMENT, COMPANIES NEED TO IDENTIFY WHICH ARE THE POTENTIAL ETHICAL BIASES AND THE MEASURES TO OVERCOME THEM

In a world where AI use is on the rise the use of robust ethical principles is vital. The consideration of ethics in AI serves as the bedrock which ensures that the application of the latest technology is aligned with the core values of equity and transparency, which are essential to an inclusive and fair digital evolution.

EXAMPLE SITUATIONS WHERE UNINTENTIONAL BIASES WERE IDENTIFIED

target — Data mining practices could predict when a women was pregnant and automatically sent discounts. In one case the targeted customer was a high school student who had not informed her family of her situation,

IBM — Facial analysis software could not correctly detect a darker-skinned face given systems were often trained on images of predominantly light-skinned men. Errors guessing lighter-skinned where at most 1% compared to 35% for darker-skinned.

Wharton — AI developed by a professor dictated the outcome of probation applications for at least five years. When prisoners receiving a denial requested explanations, probation officers could not provide them due to lack of understanding,

WHAT WAS MISSING

Company guidelines
to review the potential ethical implications and customer sensitivities

Control of data used
to train the system and prevent biases

Lack of responsibility
from a person or organisation to respond in the face of any AI outcome

Source Business Insider, Press Clippings, NY Times,, GLF Survey 2024 n = 42

04 THE NASCENT STATE OF NEURODIVERSITY AND AI IN SUPPORTING DIB GOALS

LOOKING TO THE FUTURE, AI CAN HELP BRIDGE THE DIVERSITY INEQUALITY GAP

EXAMPLE POTENTIAL USES OF AI IN DIVERSITY AND INCLUSION

01 Diversity Recruitment
Broaden talent searches identifying diverse candidate pools based on skills and potential rather than traditional indicators such as job titles or educational background, which could inadvertently be amplifying under-represented groups

02 Customisation of DIB Initiatives
Collect and analyse employee engagement and satisfaction data: AI can help tailor DIB programs to address specific issues within an organisation, ensuring initiatives are tailored to actual employee needs

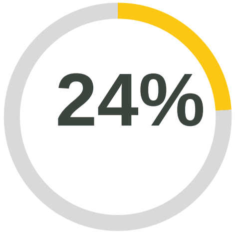
03 Monitoring DIB KPIs
Set up dashboards to track key performance indicators for DIB from multiple sources; recognise patterns via machine learning and AI, thereby enabling trends forecasting based on real data and identification of areas where DIB initiatives are most needed

04 Enhancing Accessibility
Improve workplace accessibility for individuals with disabilities through tools such as speech recognition, visual aids, and customized interfaces, making the workplace more inclusive

05 Career Advancement and Mentorship
Match employees with career development opportunities and mentorship programs, ensuring that all employees have the chance to advance and grow within the company, regardless of background

INDUSTRY CASE STUDY

Sunrise[1] measures the representation of women in its communications using the EqualVoice Factor embedded in the broad DE&I program YouBelong!



Sunrise's one-year increase in representation of female voices achieved on LinkedIn[2]

The company developed an AI tool, the EqualVoice Factor, to analyze the gender visibility gap between women and men in text, images, and video content.

The simple act of measuring which gender was represented in the posts enabled Sunrise to support increased visibility of female voices.

> *"Inclusive communication is not about distorting reality but about creating common ground and visibility for everyone"*
>
> ***Nike Möhle, VP Comm., Sustainability & DEI – Sunrise[1]***

Note: (1) Sunrise is a wholly owned subsidiary of Liberty Global, the largest private telecommunications company in Switzerland; (2) From 5.6% in 2021 to 30% by 2022 using EqualVoice. Source: Deloitte Insights, Sunrise Inclusive Languages and Images report, GLF Survey 2024 (n = 42).

05

UPSKILLING AND RESKILLING REMAIN VITAL

05 UPSKILLING AND RESKILLING REMAIN VITAL

KEY FINDINGS

The World Economic Forum[1] has identified the skills gap in the local labour market as the primary obstacle to business transformation, highlighting learning and development as a crucial strategy to overcome this challenge. Acknowledging this, and considering the rapid evolution of emerging technologies, it is crucial for the telecommunications industry to engage in both upskilling and reskilling to progress.

12 **L&D as a priority:** Over 80% of companies prioritise upskilling and approximately 60% prioritise reskilling; 98% of organisations confirm they are actively targeting at least one seniority level for upskilling and 83% are doing so for reskilling.

13 **Demand for more efficient resource allocation:** In this scenario, we would expect companies to either increase or maintain budget, but 22% of companies have decreased it. Despite this decrease, companies will still need to deliver the same outcomes and therefore will need to use allocated resources more efficiently.

14 **Development of technical skills is essential:** With technology evolving, the telecommunications industry acknowledges the significant technical capabilities required for its workforce. Companies have identified that the most sought-after skills for development are technical in nature, with a primary focus on understanding emerging technologies, the evolution of telecoms networks and their management.

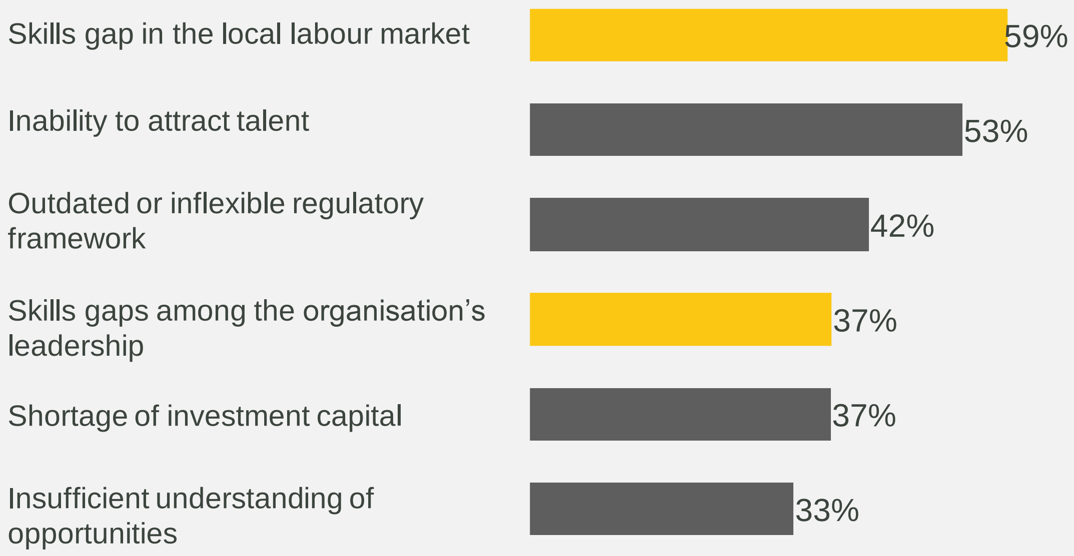
15 **L&D across the whole organisation:** Upskilling and reskilling are crucial for the entire organisation; an enhanced focus on IT and technical teams will spearhead operational efficiency and digital transformation.

(1) Source: World Economic Forum 2023 Future of Jobs report

~60% OF ORGANISATIONS AGREE THAT A SKILLS GAP IN THE LOCAL LABOUR MARKET IS A BARRIER TO BUSINESS TRANSFORMATION, WHILST OVER 35% CITE A SKILLS GAP IN LEADERSHIP

Fig. 31. Barriers to business transformation, 2023-2027
(% of organisations surveyed expecting these factors will limit the transformation of their business)

WORLD ECONOMIC FORUM



According to the WEF, the skills gap in the labour market is the most commonly expected barrier to business transformation to 2027 across organisations, and derives from:

1. Loss of internal skills and knowledge as the "baby boomer" generation exits the workforce
2. A higher turnover in young generations
3. A shorter shelf-life of skills due to the relentless advance of technology
4. A market where demand for emerging skills is bigger than supply

The telecommunications industry is also affected by these barriers, given the industry's high dependence on technology with the advancements of AI, and the rapid shift to Software-Defined Networking (SDN) and Network Functions Virtualization (NFV) in areas such as 5G and IoT, which require a different set of skills.

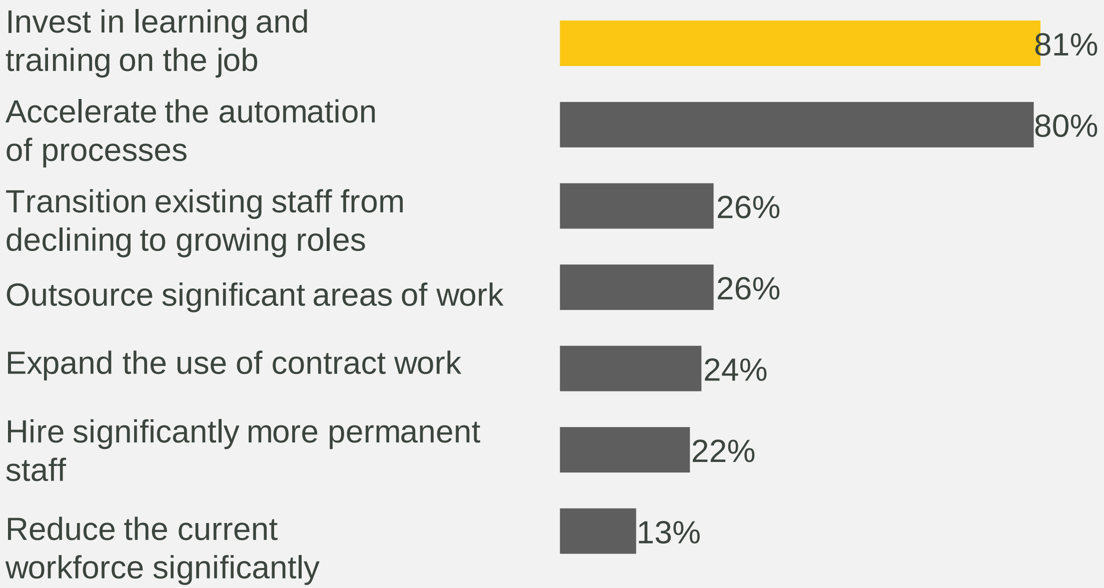
Additionally, according to PWC Global Workforce Hopes and Fears Survey from 2023 the industry's challenges are amplified by the fact that 46% of telecom employees do not believe their company will still be in business within the next ten years (compared to a third in other industries). In fact, according to pwc 32% of the workforce is likely to change jobs within the next year, compared to only 26% in other industries.

> *"The telecom industry is at the heart of a digital transformation. While long-tenure, full-time employees are experienced in traditional telecom settings, the rapid shift to DSN/NFV in areas such as 5G and IoT requires a different set of skills."*
>
> ***Anand Swaminathan, EVP & Global Head of Communications, Media & Technology – Infosys***

Source: World Economic Forum 2023 Future of Jobs report, PWC Global Workforce Hopes and Fears Survey 2023; 360 Learning 2023 Global State of Upskilling and Reskilling Report, GLF Survey 2024 n = 42

LEARNING AND DEVELOPMENT IS THE TOP STRATEGY TO REDUCE BARRIERS TO TRANSFORMATION

Fig. 32. Workforce strategies 2023-2027
Share of organisations surveyed planning to adopt these workforce strategies)



Considering this skills shortage, companies are now recognising that re-focusing on internal upskilling and reskilling can help overcome the challenges posed by the current labour market. In fact, according to last year's GLF DIB report, 63% of the companies surveyed required 10-30% of the workforce to be reskilled in the next three years. Following on that, multiple companies in the telecommunications industry are already investing, for example:

Infosys	Vodafone	Ericsson
Reskilled 2,000+ experts to acquire adjacent competencies	Aims to draw internal talent to fill 40% of its software developer needs	Upskilled more than 15,000 employees in AI and automation

"We have created the Data &AI Academy to upskill our employees and help them understand how they can use it in their roles, no matter the function. We are committed to having our people AI ready and we are training our employees to have them learn the tools"

Roary Stasko, CEO – Telstra International

"If you can upskill and reskill your existing employees, then that's cheaper than recruitment. Sometimes L&D teams do not push hard enough for internal upskilling. At the end of the day, it is more cost-effective, more engaging and has more effect on retention"

Peter Sheppard, Head of global L&D - Ericsson

Source: World Economic Forum 2023 Future of Jobs report, Clippings, company sites, GLF Survey 2024 n = 42

95% OF COMPANIES ARE ACTIVELY TARGETING UPSKILLING FOR AT LEAST ONE LEVEL IN THEIR ORGANISATION WHILST 81% ARE ACTIVELY TARGETING AT LEAST ONE LEVEL FOR RESKILLING

Fig. 33. Organisations actively targeting at least one level of the organisation[1] for upskilling or reskilling
(% of respondents)

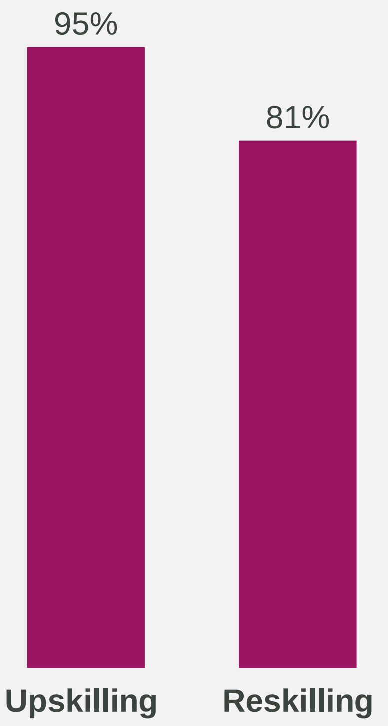
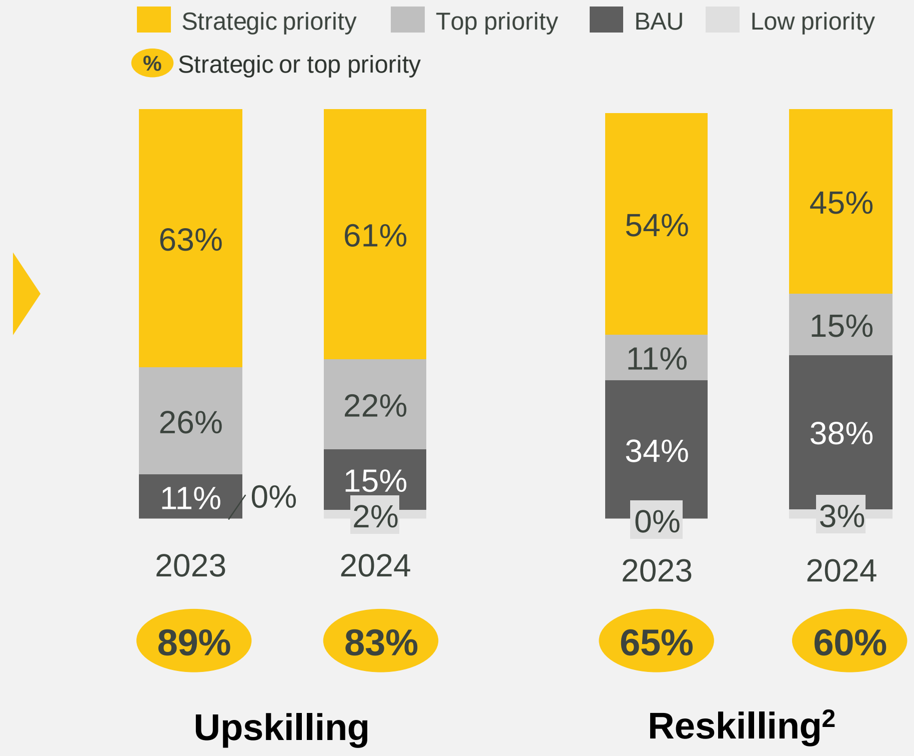


Fig. 34. Level of priority given for upskilling and reskilling in organisations
(% of respondents)



As we have just seen, upskilling and reskilling remain crucial in the industry. Hence, it is not surprising that 95% of organisations are currently targeting at least one position of the organisation for upskilling and 81% actively targeting at least one for reskilling.

Upskilling is primarily aimed at enabling vertical promotion within the company and equipping employees with the necessary skills for their current roles. Hence, it makes sense that companies target it more than reskilling, which often involves preparing individuals to switch to entirely different job functions.

> *"The aim is to become more agile by providing people with the right tools and knowledge to help the organisation to get through the digital transformation required. Upskilling is what will take the whole organisation to a higher maturity level"*
> ***Peter Van Burgel, CEO – AMS-IX***

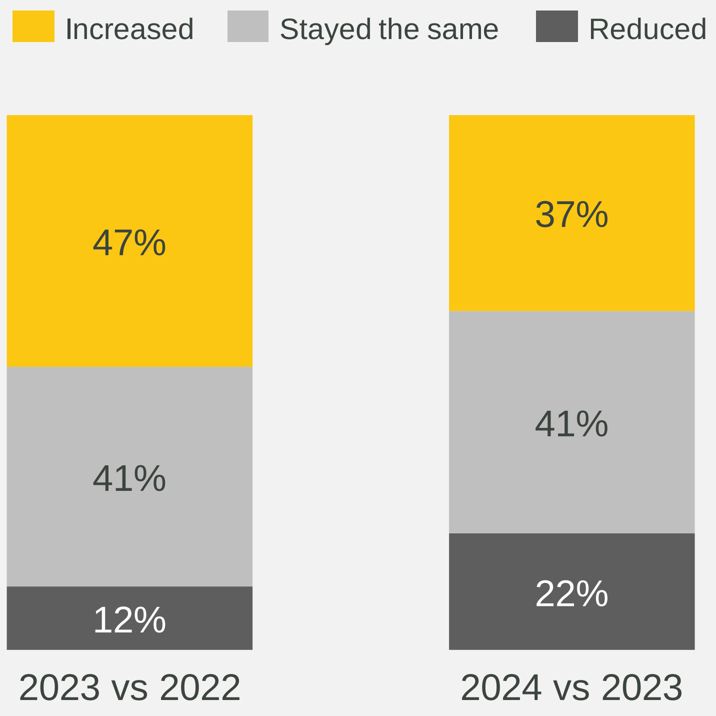
However, even though upskilling is a priority for 83% of companies and reskilling for 60%, an increasing number considers learning and development to be business-as-usual. This is a concern, given the increased need from the industry deriving from the rapid advancement of technology.

Note (1) Considers entry level, juniors, mid-mgmt, and senior mgmt; (2) A higher number of smaller companies (below 100 employees) have responded the survey this edition and they usually require less reskilling capabilities as confirmed by our quantitative and qualitative research causing a steeper decrease in priority for reskilling. . Source: GLF Survey 2024 n = 41

05 **UPSKILLING AND RESKILLING REMAIN VITAL**

DESPITE THE STATED FOCUS ON UPSKILLING AND RESKILLING, OVER 20% OF COMPANIES REDUCED THEIR L&D BUDGETS IN THE LAST 12 MONTHS

Fig. 35. YoY evolution of Learning and Development budget
(% of respondents)



Upskilling and reskilling area clearly a priority for organisations. However 22% of companies have have reduced L&D budgets for 2024 with interviews suggesting that this is part of overall budget pressure caused by the macro-economic and operating environment. Despite this pressure, the imperative on both upskilling and reskilling remains as the industry requires to develop those capabilities to succeed. Hence, despite some instances of budgetary pressure there is no evidence this year of companies reducing their aspiration or targets.

22% **22% reduced budget therefore will need to be more efficient with resources to deliver the same outcomes**

Therefore, resources are being stretched and organisations will need to leverage existing resources more efficiently, invest in technologies to enable more scalable learning opportunities, and/or use data analytics to fully understand the specific skill gaps, identify the right people to target and deliver the development programmes.

> *"Upskilling and reskilling continues to be a priority. Focus on learning and development pathways to prepare employees for the skills needed for the future will continue"*
>
> ***Jennifer Parkhill, Sr. Director Strategy Execution, Program Management - Verizon***

Source: GLF Survey 2024 n = 41

THE DEVELOPMENT OF TECHNICAL CAPABILITIES IS IDENTIFIED AS THE PRIORITY FOR UPSKILLING AND RESKILLING, REPRESENTING THE TECHNOLOGICAL TRANSFORMATION FACING THE INDUSTRY

increase | remained the same | decrease | X Average score | Top three values

Fig. 36. Level of importance given to the following capabilities for upskilling and reskilling of talent within organisation

Score 1-5, with 5 being highest score[1]

	Upskilling 2023	Upskilling 2024	Change	Reskilling 2023	Reskilling 2024	Change
Understanding of emerging technologies (e.g: blockchain)	4.4	4.3	decrease	4.1	4.0	decrease
Understanding of telecoms network evolution (e.g., 5G, edge)	4.4	4.3	decrease	4.2	4.0	decrease
Understanding of telecoms engineering/ network management (or similar question – i.e., how to run the network now)	4.1	4.3	increase	4.0	3.9	decrease
Software development and programming	4.2	3.8	decrease	4.0	3.6	decrease
Financial analysis	3.8	3.7	decrease	3.7	3.5	decrease
Presentation/communication skills	4.0	3.9	decrease	3.8	3.7	decrease
Commercial skills (e.g., pricing/negotiation)	4.1	4.1	remained the same	4.1	3.8	decrease
Average score	4.1	4.1		4.0	3.8	

With technology rapidly evolving, marked by advancements in 5G, AI and IoT among others, emphasis on upskilling and reskilling employees to develop this capabilities is imperative as companies need to adapt to new market realities and technological shifts

> *“Commercial skills is one of the top capabilities to be developed from both the business side of the equation and the new technology perspective like 5G or AI”*

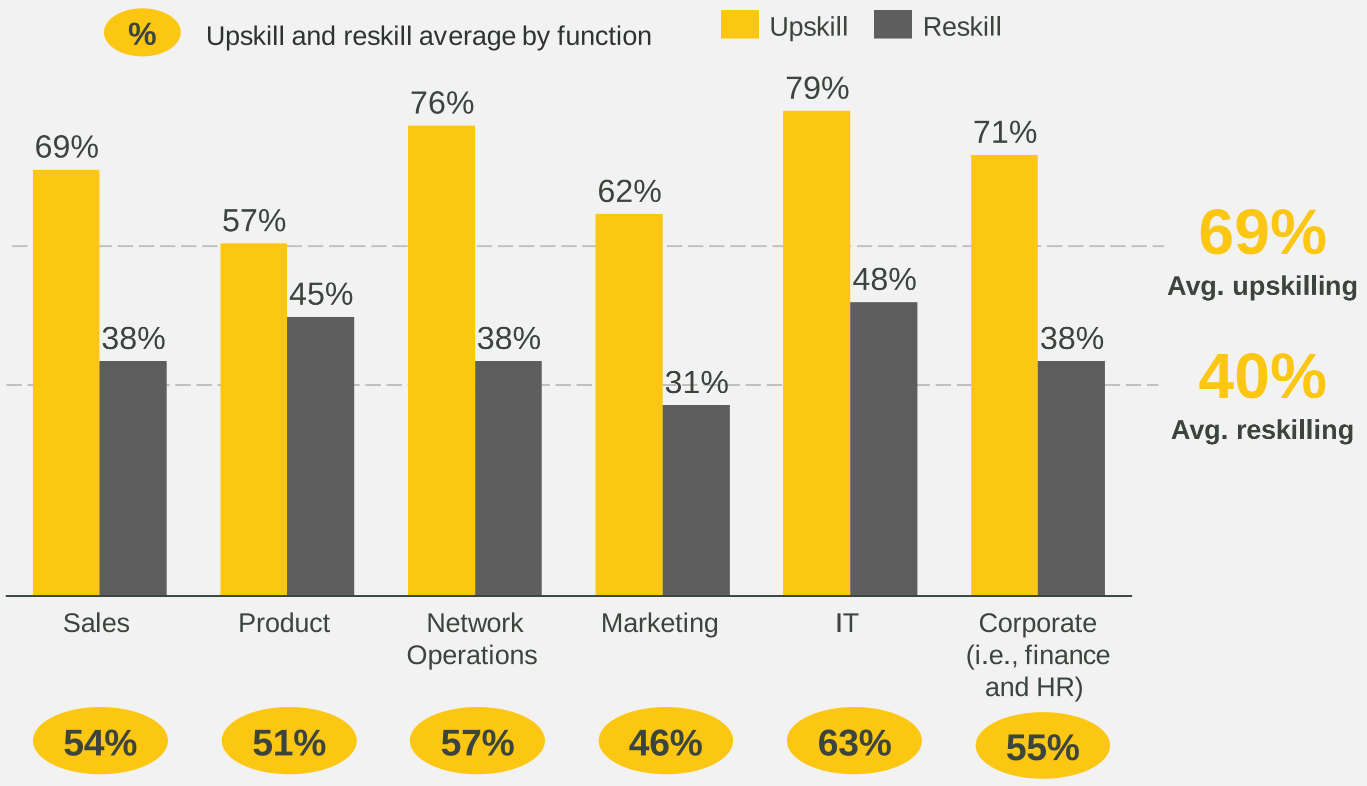
For that, technical capabilities development such as the understanding of emerging technologies, telecoms network evolution and the telecoms engineering/network management is vital.

Qualitative research insights underscore the intricate relationship between sales capabilities and technical knowledge Successful evolution of the business requires sales capabilities along with deep technical understanding.

Note (1): Anand Swaminathan; GLF Survey; Source: GLF Survey 2024 n = 41

L&D IS VITAL ACROSS THE WHOLE ORGANISATION ALTHOUGH THERE IS A HIGHER FOCUS ON IT AND TECHNICAL TEAMS TO LEAD COMPANIES TOWARDS HIGHER OPERATIONAL EFFICIENCY AND DIGITALIZATION

Fig. 37. Functions that are currently actively targeted for reskilling and/or upskilling
(% of respondents)



IT is slightly more targeted than other functions derived from organisations' need to deliver on a holistic digital transformation that will come hand-in-hand with the transition from legacy systems to more agile and automated solutions.

To drive these changes, multiple companies have mentioned a high focus of training on technical teams. However, it is critical that upskilling and reskilling are targeted across the whole organisation. Companies must ensure that every function is equipped with the required capabilities to place the organisation at the forefront of digital excellence and efficiency.

> *We are trying to bring the organisation to a higher level of maturity by being more agile. We are investing in IT and systems while ensuring people have the right tools and knowledge to drive the organisation through the digital transformation required*
>
> ***Peter Van Burgel, CEO, - AMS-IX***

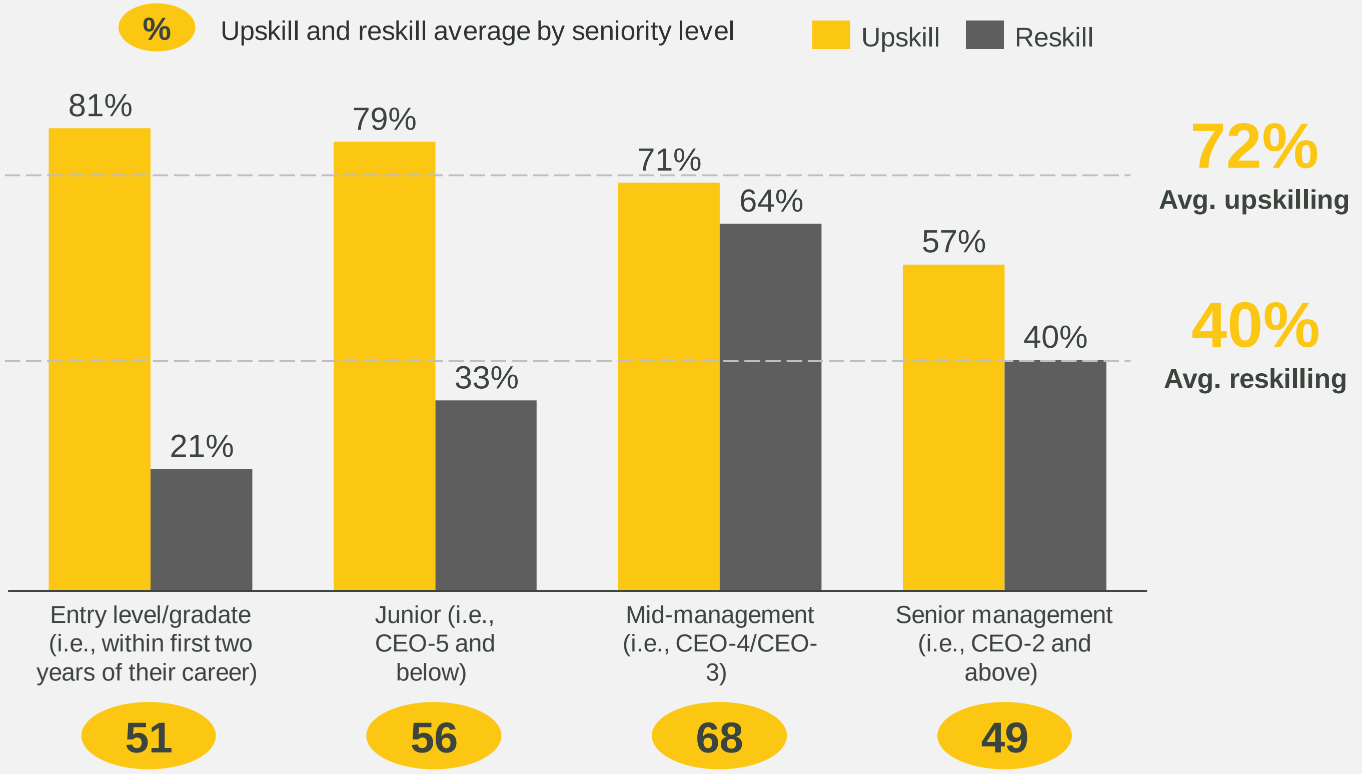
> *"In the commercial side because of the type of business and its evolution there are a lot of technical requirements. If you are a salesperson, besides the commercial skills you will also need the technical understanding"*
>
> ***Luisa Sanchez, VP of Messaging – Identidad Technologies***

Note (1) Considers entry level, juniors, mid-management, and senior management; Source: GLF Survey 2024 n = 42

05 UPSKILLING AND RESKILLING REMAIN VITAL

~80% COMPANIES TARGETING ENTRY AND JUNIOR LEVELS FOR UPSKILLING WHILE MID-MANAGEMENT IS KEY FOR COMPANIES TO ENSURE FUTURE LEADERSHIP TEAMS ARE EQUIPPED FOR SUCCESS

Fig. 38. Levels of seniority that are currently actively targeted for reskilling and/or upskilling
(% of respondents)



Upskilling is a clear strategic priority, with at least 57% of companies targeting all seniority levels. For entry-level and juniors, it increases to ~80%.

Organisations mention that junior levels normally lack the required telecom knowledge to duly perform and they mention their commitment to ensure they develop. However, while some companies only target those with high potential, others direct the efforts across the entire level.

In contrast, most companies targeted mid-management, both upskilling and reskilling. This is due to the pivotal role mid-management plays, bridging between the strategy set by seniors and the operational execution of juniors, and the need to ensure the next generation of leadership are equipped. Some companies also mention that they were trained during entry-level in a certain way but now require a different training as they take in more responsibility and respond to different functions.

There is high relevance given to L&D for Senior Management who despite they are traditionally more time constrained are still targeted for both upskill and reskill.

> *"Mid-management are the ones most targeted in terms of % because they are the ones with the biggest impact, and will also influence on the teams they manage. Senior management is the sole to be reskilled as they take more responsibilities and hence answer to different functions"*
>
> ***Alec Cochrane, D&I Director, EXA Infrastructures***

Note (1) Considers entry level, juniors, mid-management, and senior management; Source: GLF Survey 2024 n = 42

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