20-FIRST's 2018
GLOBAL GENDER BALANCE SCORECARD

APRIL 2018

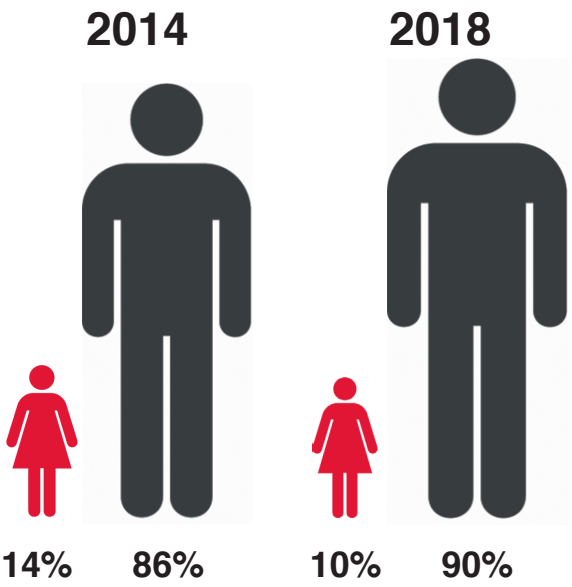
Telecoms Top Companies:
Women Please Stay on Hold

At 20-first we believe the best measure of progress towards gender-balanced businesses is the make-up of Executive top teams rather than Boards. Here we report on the 18 Telecoms Companies in the Fortune Global 500.

Key Findings

- In 2018 there are 155 men and 15 women in the top teams of the 18 leading telecoms companies. Overall sizes of executive teams in the telecoms sector in the Fortune Global 500 has fallen: in 2014 there were 208 men and 29 women.
- Globally this shows a decline in percentage of female executives on top teams, from 14% to 10%.
- Regionally, 10% (14% in 2014) of the senior executives of the Americas companies, 16% (18%) of the European and 0% (8%) of the Asian, are women.
- Congratulations to Orange and Telefonica, where a third of top executives are female. But 11 out of 18 companies still have entirely male top teams.
- The Telecoms sector is the only one in our 2018 research to have actually gone backwards on gender balance - a sorry state of affairs.

% Men and Women on Executive Committees of Top 18 Telecoms Companies



Our Rankings

The Top 20 companies on the following pages are segmented into one of the following four phases:

- **Asleep.** No women on the EC, in either staff or line roles. Some companies may have a weak succession pool with little prospect of bringing women on to the EC within 3-5 years.
- **Starting.** One woman on the EC. A bonus point if she's in a line or significant P&L role. Staff roles (HR, Legal,Communications) are important, but rarely lead to the very top.
- **Progressing.** Two voices are stronger than one. With two female voices on the EC, particularly in line roles, it's less easy, consciously or not, to see them as 'the token woman'.
- **Critical Mass.** With three or more women on the EC, their contribution becomes a norm. High EC numbers may promise a strong talent pool coming up.

Survey Methodology

The data for this survey is based on information provided by companies listed in the 2017 Fortune Global 500. Data is taken from websites and annual reports, as of February 2018. The Executive Committee is defined as the CEO and executives who report directly to the CEO, or as defined by each company. Some companies list a broader group of 'Top Leadership'. Where this is the case clarification has been requested from companies, and if no reply is received we use our best judgement to identify reportees to the CEO, based on job title and role.

20-first research analyses progress on gender balance in the top companies of a number of industry sectors, as well as across the top 100 companies of the Fortune Global 100. For more, go to https://20-first.com/gender-research/

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Staff or support roles include Communications, HR, Legal, IT, Strategy, Public Policy, etc.

Line or operational roles include CEO, CFO, Country Head, Business Unit Head, etc.

20–first's Gender B
Focus on Tel

Orange
Stéphane Richard

Critical Mass

Executive Committee
4 / 8
= Line = Staff

Verizon
Lowell McAdam

Critical Mass

Executive Committee
3 / 10
= Line = Staff

Telefonica
Jose Maria Alvarez-Pallete Lopez

Critical Mass

Executive Committee
3 / 6
= Line = Staff

Vodaphone Group
Vittorio Colao

Progressing

Executive Committee
2 / 12
= Line = Staff

AT&T
Randall Stephenson

Starting

Executive Committee
1 / 9
= Line = Staff

Deutsche Telekom
Timotheus Höttges

Starting

Executive Committee
1 / 7
= Line = Staff

BT Group
Gavin Patterson

Starting

Executive Committee
1 / 11
= Line = Staff

Altice
Dexter Goei

Asleep

Executive Committee
0 / 3
= Line = Staff

China Mobile Communications
Li Yue

Asleep

Executive Committee
0 / 4
= Line = Staff

Balance Scorecard: ecoms Sector

Staff or support roles include Communications, HR, Legal, IT, Strategy, Public Policy, etc.

Line or operational roles include CEO, CFO, Country Head, Business Unit Head, etc.

America Movil
Daniel Hajj Aboumrad

Asleep

Executive Committee
0 / 5
= Line = Staff

China Telecommunications
Yang Jie

Asleep

Executive Committee
0 / 5
= Line = Staff

China United Network Communications
Wang Xiaochu

Asleep

Executive Committee
0 / 5
= Line = Staff

Comcast
Brian Roberts

Asleep

Executive Committee
0 / 6
= Line = Staff

Charter Communications
Thomas Rutledge

Asleep

Executive Committee
0 / 7
= Line = Staff

Softbank Group
Masayoshi Son

Asleep

Executive Committee
0 / 8
= Line = Staff

Nippon Telegraph & Telephone
Hiroo Unoura

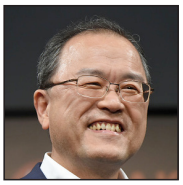
Asleep

Executive Committee
0 / 11
= Line = Staff

Telecomm Italia
Amos Genish

Asleep

Executive Committee
0 / 11
= Line = Staff



KDDI
Takashi Tanaka

Asleep

Executive Committee
0 / 12
= Line = Staff

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20-FIRST

BUILDING BALANCED BUSINESSES

Who we are

20-first is one of the world's leading global consultancies focused on gender balance as a business and economic opportunity.

We work with many of the best known global companies that seek to move from 20th century mindsets, management styles and marketing approaches into more progressive 21st century forms – and to stay first at the game.

Hence our name. It underlies our purpose, and those of the clients we serve.

1
Wake Up
Engage leaders and managers

2
Start Smart
Launch an initiative with the right people and the right positioning

3
Align Leaders
Get buy-in on why balance is a business opportunity and how to scale it

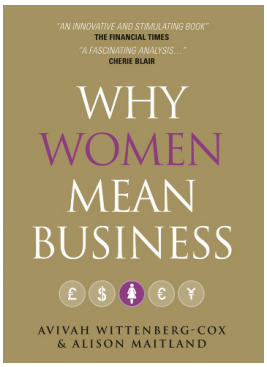
4
Build Management Skills
Equip managers with skills needed to manage across genders

5
Sustain the Change
Keep up the momentum, track progress and reward success

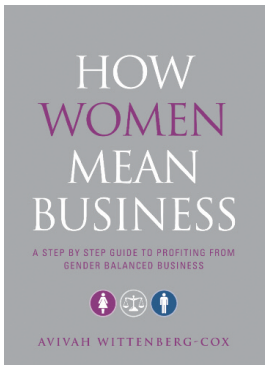
What makes us different

- **The business Imperative:** We help companies to unlock 21st century Market and Talent opportunities
- **Focus on leaders, not on women:** We equip leaders with a strategic understanding and management competencies to work across genders
- **Global perspectives:** We are experienced working with global companies across all regions and cultures of the world

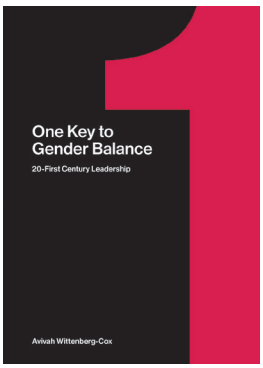
For more information, please contact queries@20-first.com



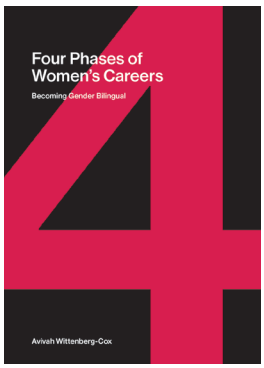
Business Case



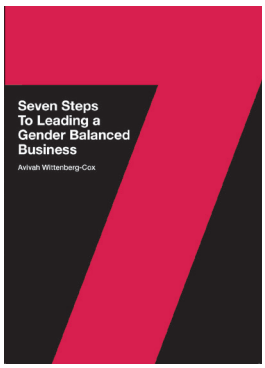
Implementation



Overview



Careers



Leadership

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