



Roland
Berger



*Journée
de la
Femme
Digitale*



SCANNING

ANALYSIS

Women & Digital

**How does Digital transform
the role and the place of
women at the workplace?**

August 2016



Women & Digital – is a global study conducted by Roland Berger together with its partners

Organizations behind the Women & Digital and goal of the study



> Leading global consultancy company of a European origin



> Leading European start-up accelerator and innovation center



> Annual conferences targeting women who are active in the digital world

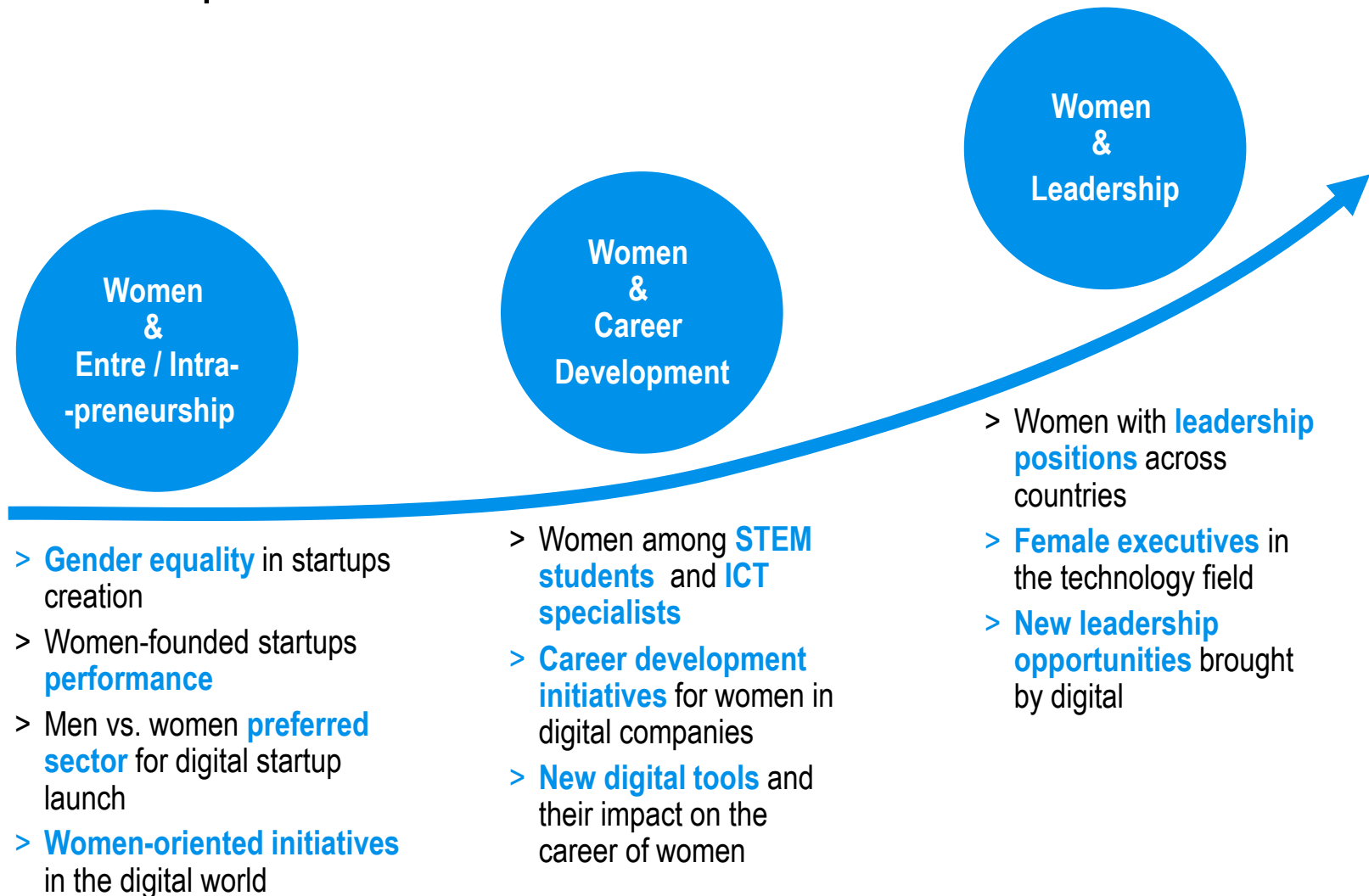


> Network of women active in a digital world



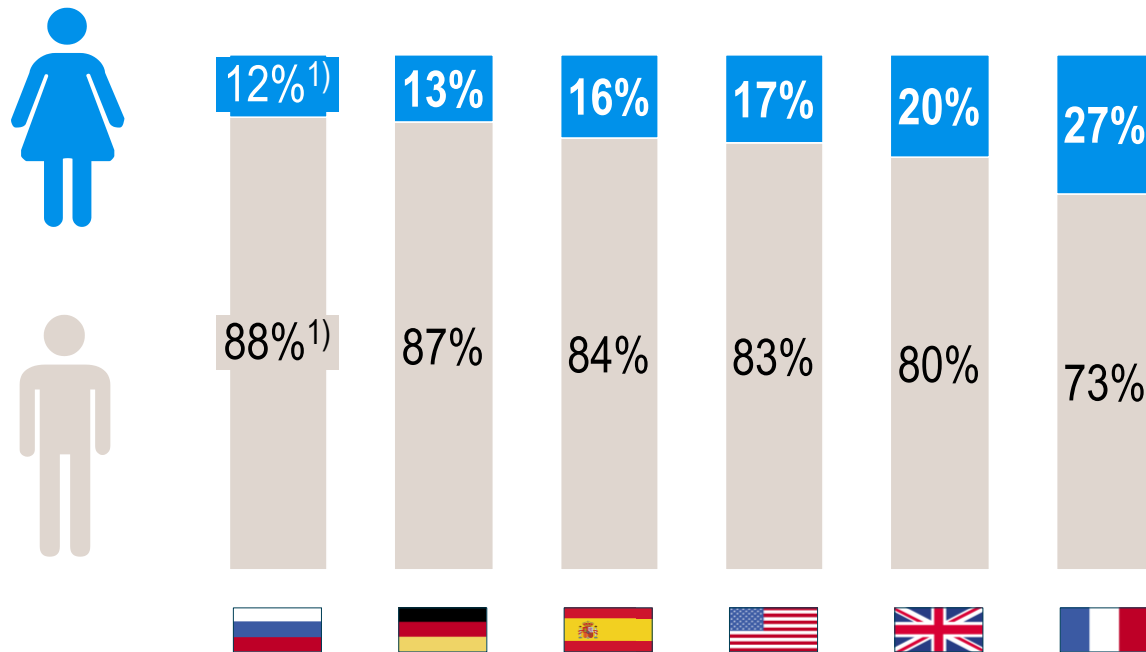
How digital technologies has transformed gender equality at workplace?

How does Digital transform the **ROLE** and the **PLACE OF WOMEN** at the workplace?



Today, women are still rare in the digital entrepreneurship sphere – in Russia even more than in other countries

Share of women vs. men in digital startups, 2015 [% of total start-up founders]

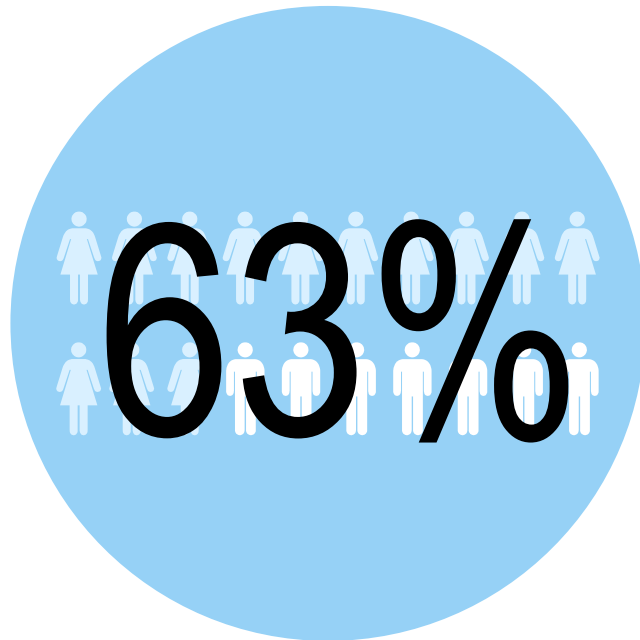


A MANLY environment where women struggle to stand out

1) Results are preliminary

But when women start their own company, they are bold and more successful than men

Successful leaders in the startup ecosystem




is the number of female-founded companies that outperformed all male-founded startups in terms of market valuation growth since first round investment


“ *Banking and tech are two white male dominated industries that need a fucking kick up the ass!* ”

Elizabeth Lumley, Director of Global Ecosystem Development Fintech & Insurtech at [startupbootcamp](#)

“ *Women shouldn't be afraid to put themselves forward* ”

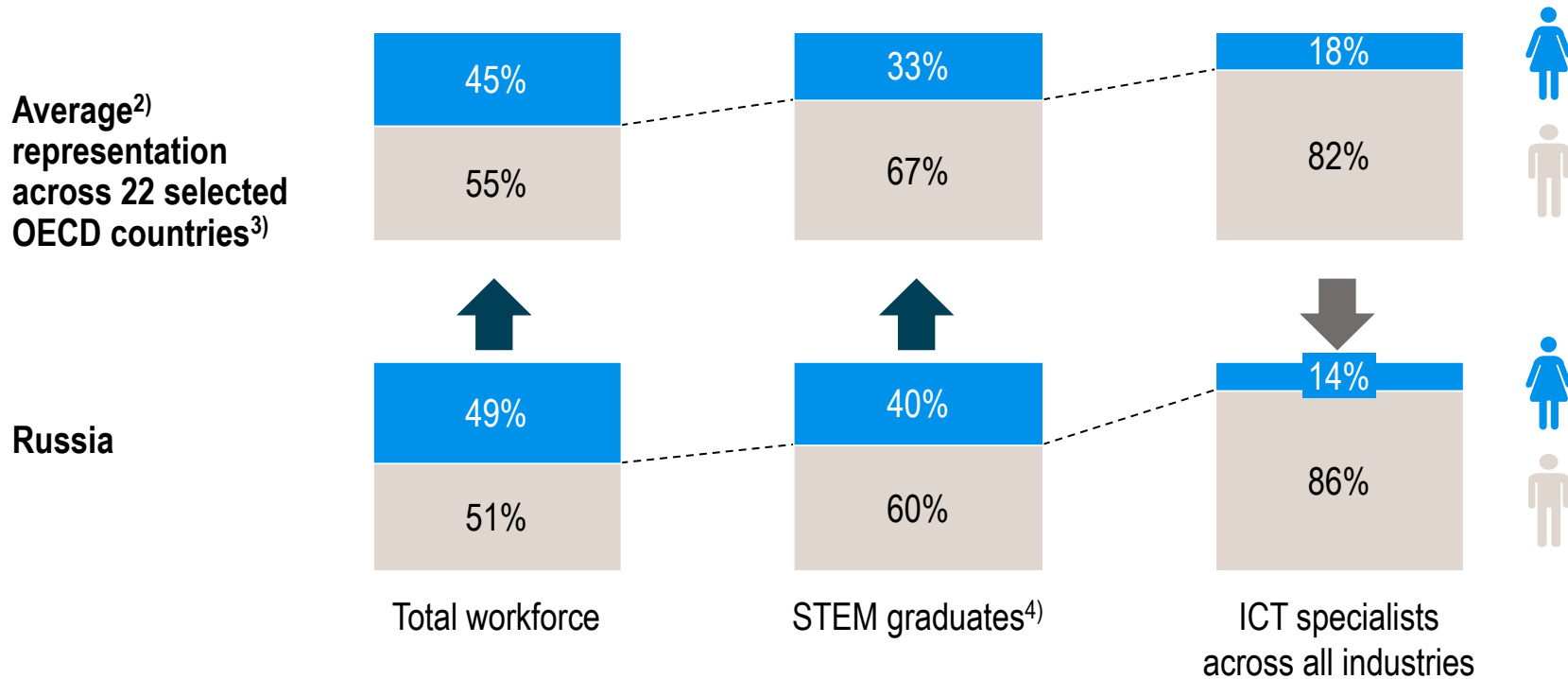
Sarah Wood, Co-Founder and Co-CEO at 

“ *We need more women in the digital sector, they see services and needs differently* ”

Celine Lazhortes, Founder and CEO at 

Technology appears to be unattractive for Russian women as a field to work in

Women in the workforce and in the technology sector, 2013¹⁾, [%]



1) Except 2011 for US ICT specialists, 2014 for Russia

2) Arithmetic average (non-weighted by population)

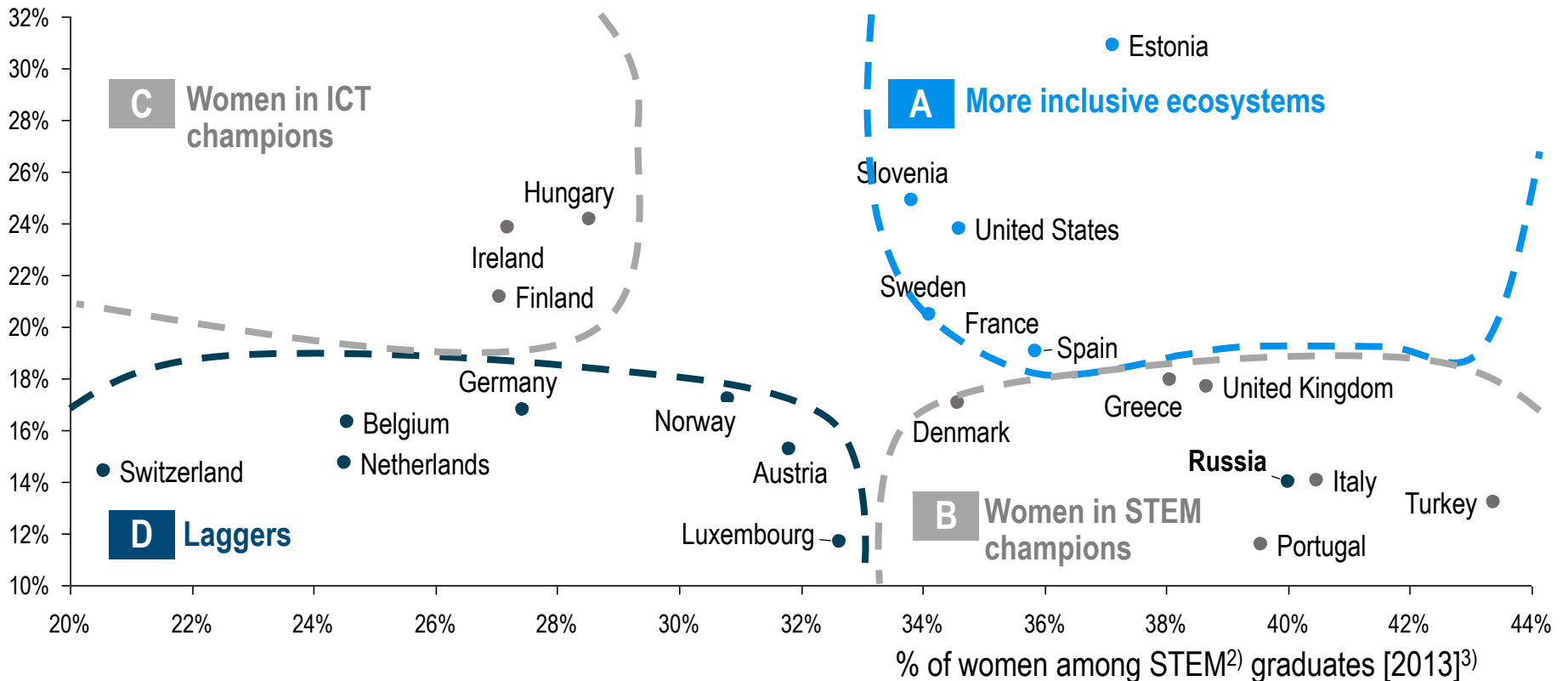
3) Austria, Belgium, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom, United States

4) Science, Technology, Engineering and Mathematics; Includes bachelors, masters and doctoral programs; statistics for Russia is based on data for top 10 technological universities

The inclusive ecosystem to attract women to work in the technology sector is to be developed

Ability to attract women in technology across countries

% of women among ICT specialists [2013¹⁾]



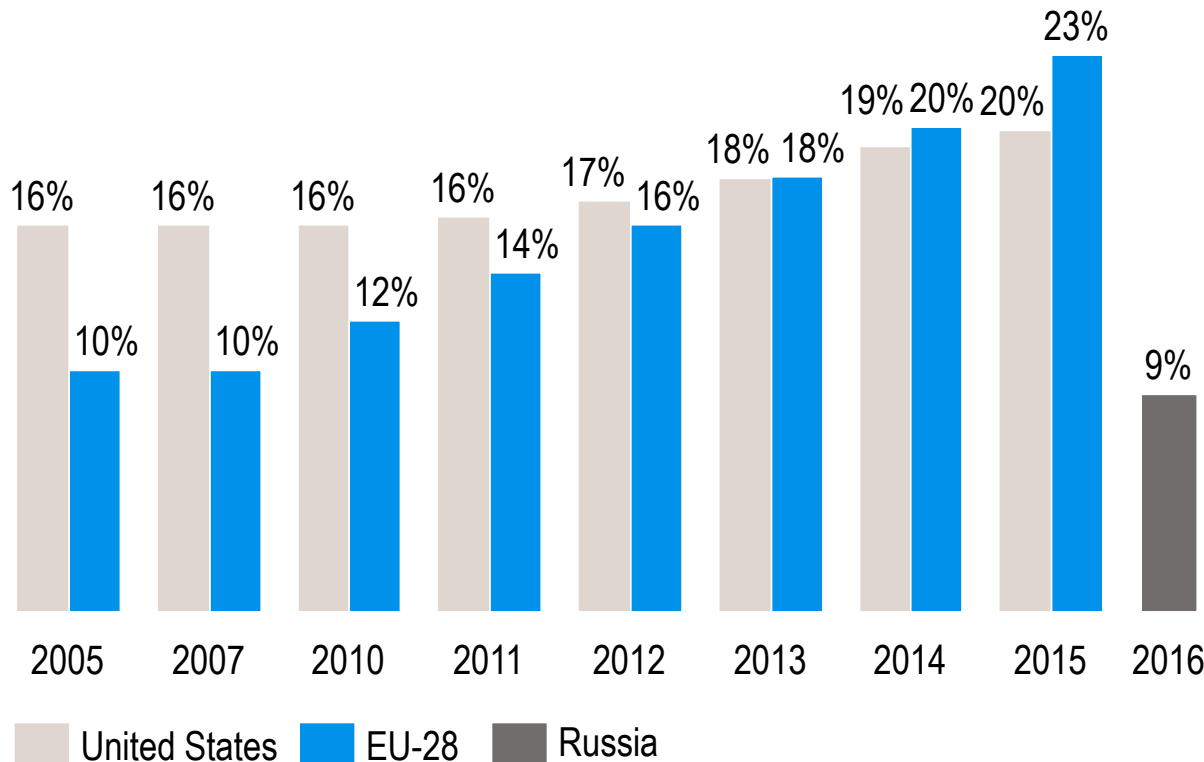
1) Except for US (2011)

2) Includes bachelor, master and doctoral programs

3) Except for Russia (2014)

The share of women among board members in Russia remains considerably lower than in developed countries

Share of female board members in top publicly traded companies, [%]¹⁾



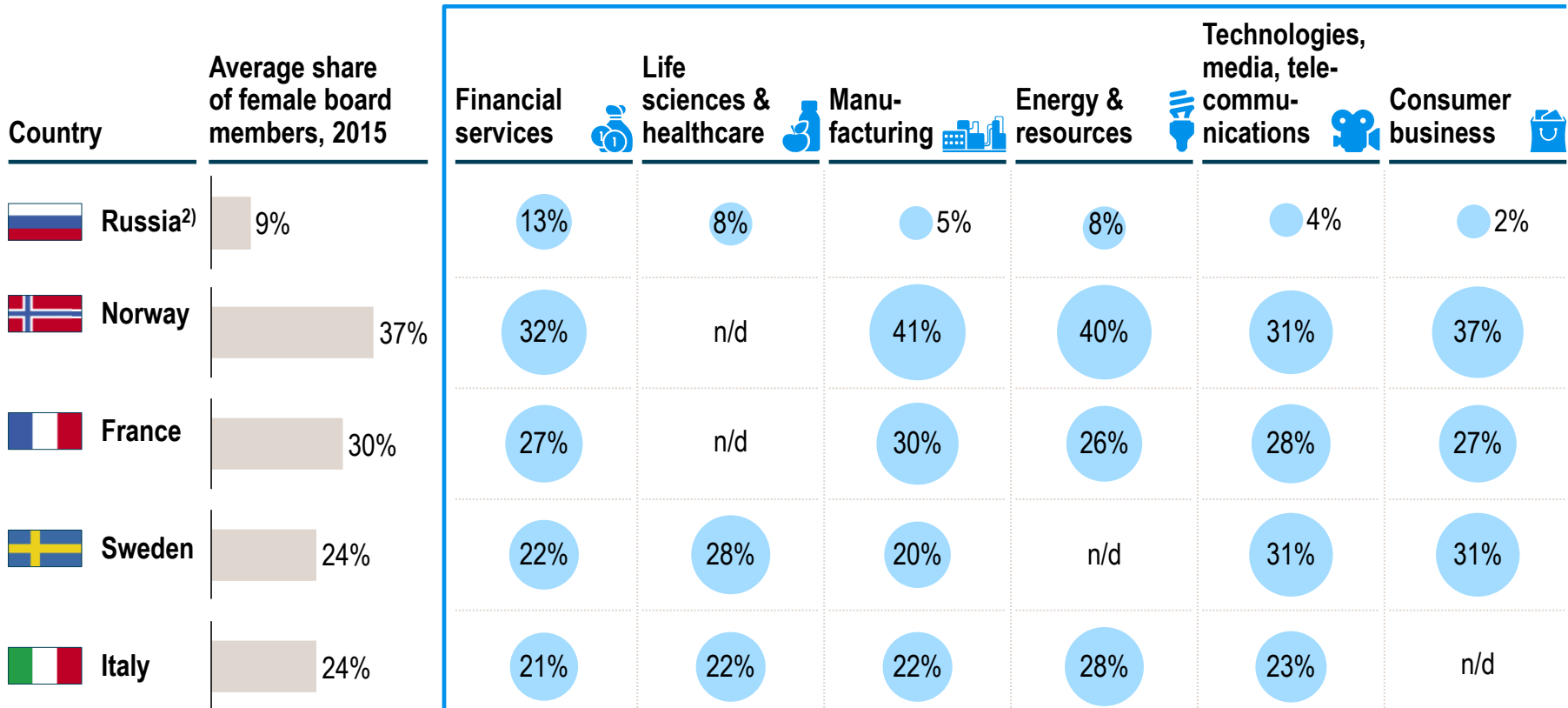
- > Significant developments in the recent years in Europe. **Improvements** were mainly driven by **legislative action**, notably in France, Germany and Italy
- > Despite their significant upstart, **the United States are now lagging behind Europe**
- > **Russia is lagging behind** all developed countries

1) Scope: Largest publicly listed companies in the US, in Europe and in Russia

Leadership in the TMT sector is one of the most diversified globally, while in Russia the share of female board members remains low

Top industries with highest percentage of women in boards¹⁾

Share of female board members, 2015

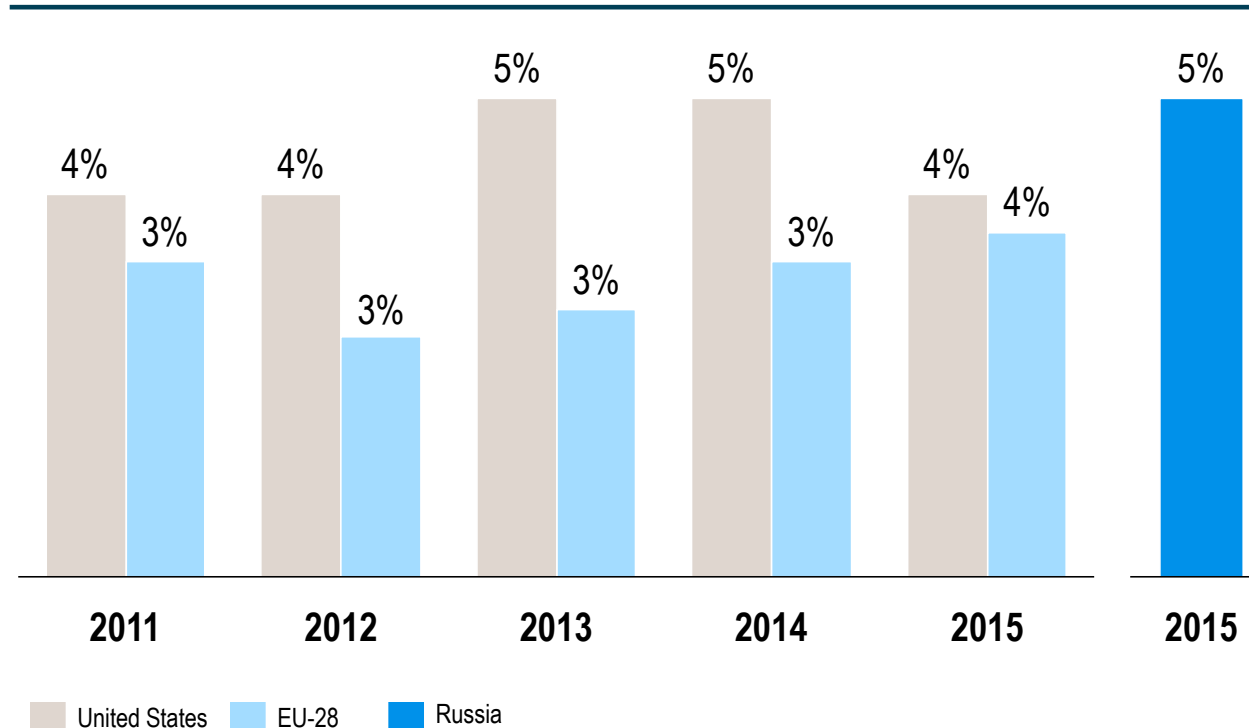


1) Russia vs. top 4 countries with largest share of female board members globally
 2) Data for Russia is for 2016, based on research on the companies from RAEX-600

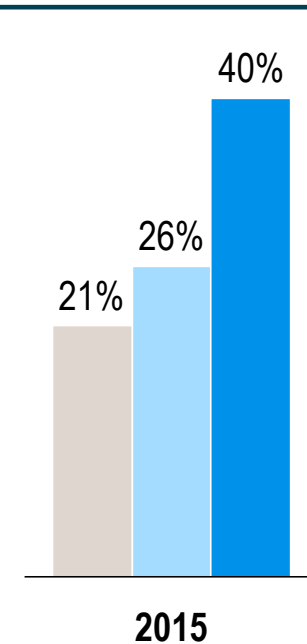
Though, women have relatively higher representation among corporate management

Share of female leaders in top publicly traded companies

Share of female CEOs

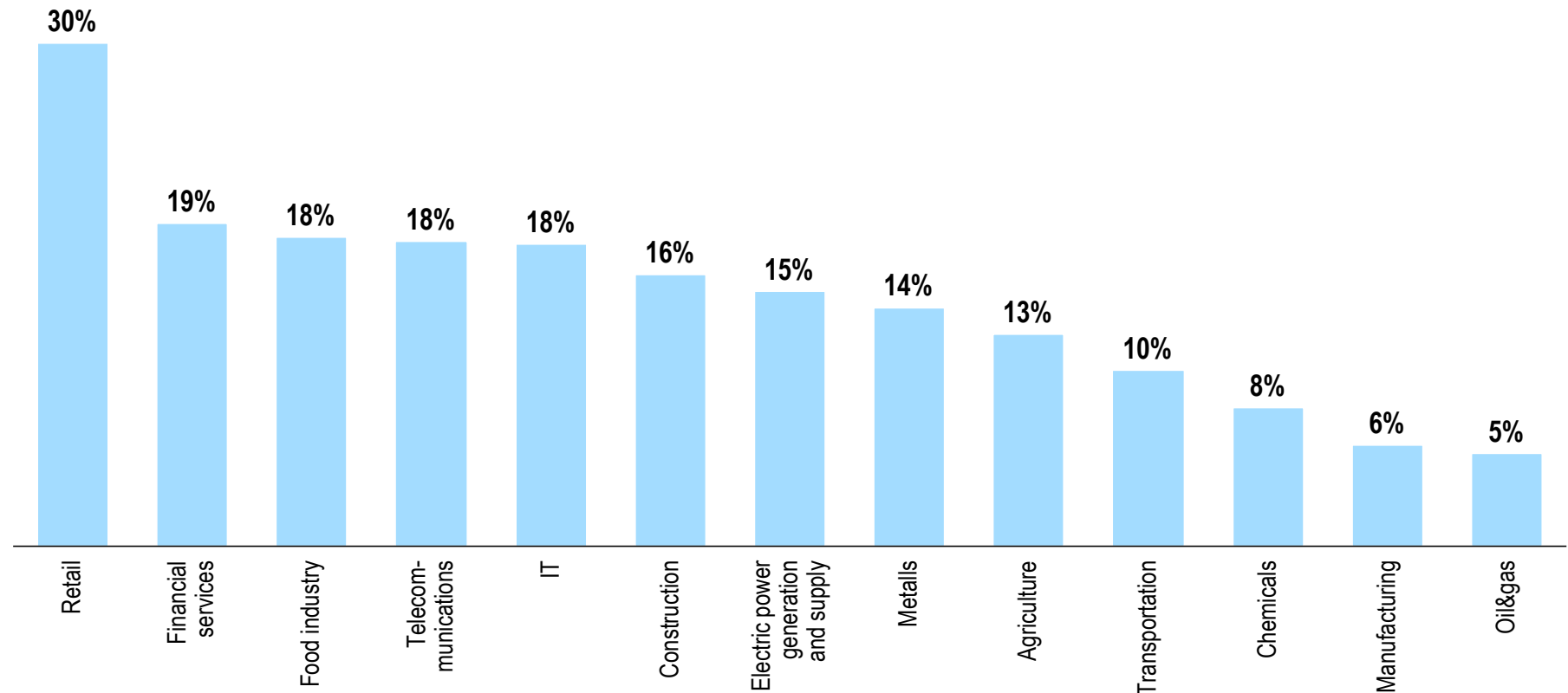


Share of female leaders on top and middle management levels, 2015



There is a difference across industries in terms of leadership diversity: retail is the most advanced sector

Share of female top-managers in Russia¹⁾, [%]



1) Top 10 companies from each industry are considered (based on RAEX-600)

Leadership has a **KEY ROLE** to play when it comes to promoting gender equality

Top priorities for executives to foster gender equality

Priorities

#1 Cite gender-equality as a key goal at own company

Current landscape

Only **37%** of C-Suite executives¹⁾ agree that creating a diverse executive team is a priority for their organizations

#2 Define a formal strategy for achieving gender balance

43% of below C-Suite executives¹⁾ state that their companies do not have a formal strategy for achieving gender balance

#3 Act as mentors and role models for women

33% of female employees²⁾ report lacking of mentors and role models

Example of a highly inspiring gender-equality advocate

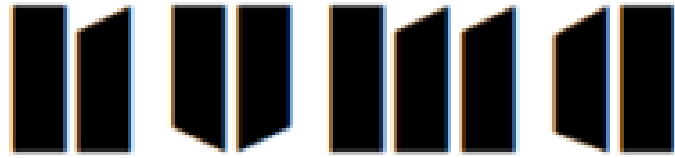


Sheryl Sandberg,
COO at **facebook**

- > Successful career in technology: she worked for 7 years at Google before joining Facebook
- > Author of *Lean In*, a widely acclaimed book about women and leadership which sold more than 2 million copies worldwide

1) Global survey conducted by KRC Research and Weber Shandwick across 55 countries; 327 respondents (2015)

2) LinkedIn Study: % of respondents who cited lack of role models as a key challenge in their career; global scope



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Let's Think: act digital!