GROWTH THROUGH BALANCE

HOW BRIDGING THE GENDER DIVERSITY GAP WILL BOOST TMT COMPETITIVENESS

RESEARCH REPORT ASSESSING GENDER DIVERSITY IN THE TMT INDUSTRY WITHIN THE UK.
Despite overwhelming acceptance of the benefits of gender diversity on business decision making, women are even more under-represented in the UK Technology, Media and Telecoms (TMT) industry than they were a decade ago. This is a major concern: rapid technological transformation has attracted new competition and new talent. The response requires traditional providers to re-evaluate their recruitment, retention and progression strategies. The type of workforce we build, and the culture we develop within our organisations, will define our collective future success.

The TMT industry is being disrupted in ways that would have barely seemed plausible a few years ago. The pace and agility of new entrants, combined with a relentless focus on user experience, has allowed them to quickly build market share. Established providers require a much more diverse set of skills and capabilities in the product design and development stage to compete in this new world. The traditional, engineering-led development of new products and services, offering cutting-edge technology but a poor user experience, is over.

The industry also needs to consider its ‘public face’. How well do technicians, contact centre and retail store operatives reflect the customer base? And how representative are senior leadership teams of both employees and customers? For the established players, building a more diverse workforce will be an essential foundation of future success. The headline statistics suggest a lack of improvement, but this study demonstrates real resolve at the most senior levels of the industry to lead the necessary change. Tom Mockridge, CEO at Virgin Media, sums up the challenge: “we’re making positive progress – but it’s incremental rather than transformational.”

We believe that accelerating progress on gender diversity is vital for the competitiveness of the TMT industry. Growth potential is currently being restricted by drawing on a small reservoir of feminine viewpoints and characteristics, leading to a lack of diversity of thought, a narrower view of customers and an imbalanced talent pipeline. This report combines the views of industry executives and our own proprietary data sources to identify three ways in which companies can reap the rewards of a more gender balanced organisation:

- **Using Gender Diversity Targets Wisely:** applicability and balance
- **Modernising Antiquated Working Practices:** the flexibility to deliver
- **Expanding the Future Talent Pipeline:** invest bottom up, inspire top down

**EWAN MACKAY**, **MANAGING DIRECTOR UKI COMMUNICATIONS MEDIA AND TECHNOLOGY ACCENTURE**
INTRODUCTION

The TMT industry sits in a privileged position to revolutionise the gender diversity debate. Not only is it growing rapidly, creating the highest number of private sector jobs in the UK over the past decade – but it also sits at the heart of the digital disruption which is opening doors for women to (re)enter the world of work. As Kerry Small, Global Head of Enterprise Customer Operations at Vodafone, explains: “This is a pivotal moment. The digital age offers huge potential to bring women back into the industry as the behavioural and cognitive aspects of technology related to user experience become key product and service differentiators.”

We also know that women with strong digital skills and tech experience are more likely to get ahead: Our 2017 Getting to Equal report showed the growing power of digital in balancing personal and professional commitments to advance further and faster in the workplace. And the role of the industry in facilitating women’s progress cannot be understated. Technology companies are building apps and software to allow people to operate remotely from the traditional working environment. Telecoms firms reach into people’s homes, allowing women to build skills that employers are looking for, to work around other commitments and outside standard office hours. Media companies highlight the ongoing gender diversity struggle and hold companies to account.

This report draws on interviews with senior executive leaders at the BBC, BT, News UK, Openreach, Sky, Virgin Media, Vodafone and the Royal Television Society as well as on our wealth of survey data covering thousands of businesses and consumers across the world to examine:

1. **THE KEY CHALLENGES THAT A LACK OF DIVERSITY POSES TO COMPANIES IN THE INDUSTRY**, issues affecting all industries, but which have particular relevance in TMT

2. **THE SOLUTIONS THAT INDUSTRY EXECUTIVES HAVE ALREADY PUT IN PLACE TO CLOSE THE GENDER GAP** and those which they see as vital to attracting, retaining and progressing more women

3. **THE WAYS IN WHICH COMPANIES CAN BRIDGE THE GENDER DIVERSITY DEFICIT** as they build workforces sufficiently agile and diverse to deal with a rapidly evolving technological and business landscape

68%

**JOB GROWTH RATE IN THE INFORMATION & COMMUNICATIONS INDUSTRY, 1997-2016**

SOURCE: ONS 2017

Our panel of industry leaders believe that they face both pervasive societal and industry-specific challenges in reversing the gender diversity decline. But they also agree that it is critical for the industry to keep searching for solutions, not least because of the growth opportunities on offer.

**527,000 JOBS CREATED**

SOURCE: ONS 2017

**THE HIGHER PURPOSE OF INCREASING GENDER DIVERSITY – THE SOCIAL BENEFIT – IS A BY-PRODUCT OF A COMMERCIAL DECISION.**

TOM MOCKRIDGE, VIRGIN MEDIA

**THE PROPORTION OF JOBS HELD BY WOMEN IN THE UK TMT INDUSTRY HAS FALLEN OVER THE PAST 10 YEARS**

33% TO 28%

SOURCE: ONS 2017

GENDER DIVERSITY IN RETREAT?

While employment in the UK TMT industry has grown by more than two-thirds over the past 10 years, the proportion of jobs held by women has fallen from 33% to 28% over the same period. At the top end of the corporate ladder, just two of the largest 37 companies have a female CEO. This is a concern, and not just for the industry, but for UK plc and society more broadly.
WHY DIVERSITY MATTERS

The senior leaders we interviewed identified three key challenges posed by a lack of gender diversity to the TMT industry. In this section, we explore the drivers of each, assessing the scale of the problem and gauging the appetite for change.

A LACK OF ‘DIVERSITY OF THOUGHT’

Biologically there is little difference between the male and female brain: In a 2015 study at Tel Aviv University only 6% of brains studied were internally consistent as male or female. However, there are clearly differences in the way we use our brains and in related social skills. Kerry Small, at Vodafone believes diversity “helps us operate as one rather than as a set of individuals” while other industry leaders cited empathy and collaboration as typically feminine qualities that help teams operate better. As the industry becomes increasingly characterised by inclusive, social and interactive features, these qualities are set to become critical.

Of course, there are many empathetic men and uncollaborative women; what are traditionally viewed as feminine and masculine qualities are an inherent part of every personality. The benefits of diversity of thought do not require perfectly equal numbers of men and women to be involved; it is the blend that is important, not who brings certain skills to the table. When Lisa Neale, Director of UK West for Business and Corporate Delivery at Openreach, takes on apprentices she observes how, often, males tend to throw themselves into projects “failing fast and moving on” whereas the females tend to “take a more considered approach: reading the instructions and project managing” – but she notes that the two styles are “complementary.” Valerie Hughes-D’Aeth, Director of HR at the BBC, explains that employing a diverse workforce is critical to developing content to meet its Charter commitment to “reflect the diverse communities of the whole of the UK.”

However, some of our interviewees feel that many industry boardrooms lack this crucial balance of masculine and feminine characteristics. Historically, many women who reached senior decision-making positions in the industry had to conform to outdated stereotypes of how a leader should behave. Such women offer neither true diversity of thought nor act as good role models to encourage other women (with more feminine characteristics) to strive to reach the top. For Ray Eitel-Porter, Managing Director of Accenture Analytics, the challenge is driven by deep biases: “there are still not enough women at the top across all industries, which means we have to consider unconscious bias as a potential factor and ensure we are doing everything we can to tackle it.”

The opportunity for getting it right cannot be understated: Interviewees agreed that diversity of thought generally leads to better business outcomes; from more effective, sustainable teamwork and better, more collaborative working environments to more innovative, tailored solutions to customer challenges. Tom Mockridge at Virgin Media summarises the benefits succinctly: “meetings achieve more when you have people who approach things differently in the room.”

GROWTH THROUGH BALANCE

LEADERS OFTEN RECRUIT PEOPLE WHO ACT AND SOUND LIKE THEMSELVES: SOME PEOPLE FIND IT UNCOMFORTABLE TO SHARE A ROOM WITH PEOPLE WHO DISAGREE WITH THEM.

CHRISTINA SCOTT, NEWS UK

WE’RE ALL STILL FIGHTING HISTORY IN FUNCTIONS LIKE TECHNOLOGY AND SOME COMMERCIAL AREAS IN THAT THERE’S STILL A MAJORITY OF MEN AT THE TOP OF THE PYRAMID.

ANNA COOK, SKY
The benefits to companies of truly knowing their customers are widely recognised³. Through this research we wanted to understand whether it is truly possible to know your customer without being your customer. Companies can conduct market research to explore what delights and frustrates consumers, but does a lack of diversity in key decision-making roles and functions lead to the development of packages, bundles and entertainment which simply reflect those who created them?

Theresa Wise, CEO of the Royal Television Society, believes that people tend to make content for others who “look like them”, a potential issue when most TV networks house programming and creative teams are London based. This is a problem for companies trying to access a diverse audience. We know that men and women (at the aggregate level) respond to different value drivers as customers. For example, when interacting with broadband, TV or telephone providers, women place much higher value on purchase decision drivers beyond the financial and the technical – from customer service to ease of setup, interaction and use of the products and features⁴.

However while women tend to be over-represented in customer call centres across the industry, they are under-represented in field teams. The moment engineers enter homes or businesses is a very personal – and therefore critical – moment in the brand’s relationship with the customer. Lisa Neale at Openreach agrees that companies need to “put more value on the moment that engineers enter a business or a home.” And Anna Cook, Customer Service Director & Director of Women in Leadership at Sky, says: “We are trying to attract more women into our Engineer division by expanding the in-home broadband teams. The roles are more attractive to a wider set of women as they are focused inside the home rather than on ladders – and provide opportunities for building relationships with our customers.”

### MEN MORE LIKELY TO BE EARLY ADOPTERS OF TECHNOLOGY

**33%** vs. **23%**

**MEN**

**WOMEN**

SOURCE: ACCENTURE, GETTING TO EQUAL 2017

³ https://hbr.org/2016/09/know-your-customers-jobs-to-be-done
Industry leaders generally agreed that their female customers would be more willing to pay a premium for a better experience and service. And women (at the aggregate level) interact with technology differently to men: they are less likely to be early adopters and to chase the latest device, but they are also more concerned with security when purchasing connected devices and services for the home.

There is certainly recognition that the industry needs to do more to cater to feminine tastes:
Lisa Neale at Openreach says companies that don’t develop and market specifically for women are “missing a trick”.

Interviewees highlighted a couple of success stories in this regard: Anna Cook pointed to the success of the Sky Kids App which benefited from having a female lead in product development, who was brought in to shape the design. The app was designed collaboratively with both children and their parents – with viewing ease and safety prioritised. And News UK have managed to broaden the readership of The Sun by introducing more family-focused content, such as “feeding the kids on a strict budget,” says Christina Scott, Chief Technology Officer at News UK.
MEN MORE LIKELY TO BUY TECH DEVICES IN THE NEXT 12 MONTHS

73% vs. 66%

WOMEN MORE LIKELY TO BE WORRIED ABOUT PRIVACY CONCERNS WHEN IT COMES TO PURCHASING CONNECTED DEVICES AND SERVICES IN THE HOME

79% vs. 71%

SOURCE: ACCENTURE, GLOBAL CONSUMER PULSE RESEARCH 2017
AN IMBALANCED TALENT PIPELINE

The global economy is changing at an unprecedented rate, driven by rapid technological advances in what is becoming recognised as the ‘4th Industrial Revolution’. The TMT industry is the driving force behind this change, but that does not make it immune from its consequences. If companies are to attract tomorrow’s best and brightest – those most able to maximise the opportunities of AI, automation and other new technologies – then they must reimagine how to attract women into the industry.

Many of the skills that robots have not (yet) mastered – such as creativity, empathy and teamwork – are more often defined as feminine. At Davos this year, MIT warned of looming gaps in terms of input and oversight in the roll-out of Artificial Intelligence due to a lack of diversity in technical teams. Gender bias has even been shown to have penetrated machine learning codes. For Valérie Hughes-D’Aeth at the BBC, companies need to analyse their current talent pools and ask “is this diverse enough? And, if not, doing everything you can to broaden it.”

Traditional talent pipelines into the industry are unlikely to rebalance gender recruitment and meet demand for future skills. We know that gender diversity is actually declining as the industry grows. For Emma McGuigan, Group Technology Officer at Accenture, this proves that the entire industry recruitment process is outdated: “(it was) built by men for men.”

The telecoms sector in particular has always struggled to attract women. Kerry Small at Vodafone notes that few women would want to work late night in vans. Anna Cook at Sky says: “Women do not tend to be attracted to our physical engineer roles or by running around in the dark on rooftops. We are thinking differently about how we make the roles more attractive to women.”

But some of the pipeline issues start well before the workplace. A STEM (Science, Technology, Engineering, Maths) background provides robust foundations for a career working with technology, but these subjects remain dominated by men. Our recent survey of young people in the UK found that girls are disproportionately dissuaded from engaging with technology at a young age compared with boys. ‘Academic’ and ‘boring’ are STEM associations more likely to be made by girls than boys. And boys are more likely to rate traditional STEM subjects as ‘cool’ – for them Computer Science is the ‘coolest’ subject while girls cite Expressive Arts/Drama.

There is a cultural aspect to this challenge too: women make up just 17% of computing graduates in the UK, but this almost doubles to 32% in India. Irrational stereotypes persist around girls in STEM: more than half of both parents (52%) and teachers (57%) admit to having subconscious stereotypes about girls and boys in relation to STEM. For Emma McGuigan this a deep-seated, “societal” issue which requires the industry to better connect with teachers and parents to show them the “the breadth of career opportunities” that STEM subjects open.

The UK does not have the necessary volume of technically qualified women because of the STEM perception problem.

KERRY SMALL, VODAFONE

Girls who find Maths and Computer Science fun and enjoyable (by age group)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-11</td>
<td>50%</td>
</tr>
<tr>
<td>11-14</td>
<td>36%</td>
</tr>
</tbody>
</table>

Source: Accenture, UK STEM Research 2017

**Notes:**
HOW COMPANIES ARE TRYING TO CLOSE THE GENDER GAP

Industry leaders agree that the lack of gender diversity in the industry is a hugely complex issue to solve – but also that it is critically important to keep trying. In this section, we highlight the policies and initiatives companies are currently employing – and those they want to roll out – to bridge the gap.

USE GENDER DIVERSITY TARGETS WISELY

Public announcements of diversity quotas or targets are viewed as important signals within the industry. Lynda Gratton, Professor of Management Practice at London Business School believes that: “quotas are still essential in getting women to the top. By forcing the distribution, we can get women networking with the right people and can begin liberating men to take more responsibility in the home.”

LOOK FOR A COMPLEMENTARY BALANCE OF SKILLS IN YOUR TEAMS AND GENDER WILL TAKE CARE OF ITSELF

All the companies we spoke with had targets of some sort (although we found evidence that Media companies have better gender balance than their peers in Telecoms). BT have introduced a target to more than quadruple the proportion of women in senior management positions. Vodafone has grown the proportion of women in senior leadership from 14% to 21% since 2009 and are also aiming for 30%. Most companies also mandate a 50:50 gender split on shortlists for all open roles. Tom Mockridge at Virgin Media feels companies need to overcompensate at entry level if they want to have a lasting impact at the senior management level.

Getting more women into top jobs can also create a virtuous cycle for companies. Over a third of UK undergraduates say they would be more likely to work for a company with a female CEO (just 2% say they would be less likely)³. Christina Scott at News UK says female leaders, perhaps unintentionally, attract other women to work for them and that it’s “important for senior female leaders to bring women up through the ranks with them.”

But changing the culture is always harder than making the initial announcement, says Kerry Small at Vodafone. Setting targets is often met with resistance and Emma McGuigan agrees that this needs to be carefully managed: “You have to explain what you’re doing and why you’re doing it; otherwise men think they are unfairly treated and the women think they’re not being promoted on merit.”
Anna Cook at Sky feels companies need to face into what’s perceived as positive discrimination: “We’re never going to hire bad people; we always look for the best. We’re just trying to disrupt the status quo by balancing shortlists and accessing a wider talent pool.”

**DON’T TRY TO FORCE TARGETS IN ALL DEPARTMENTS**

There is also a clear limit to what targets and quotas can achieve in isolation in some roles. Shift work can be tough for those with other commitments (such as childcare) while part-time work doubles equipment costs for companies so is rarely offered. With numbers of female field engineers typically below 10%, some companies have been slow to introduce basic infrastructure such as women’s toilets, female clothing or maternity apparel, exacerbating the lack of diversity.

**UK EMPLOYEES WHO WOULD PREFER TO JOIN A COMPANY WITH A FEMALE CEO**

<table>
<thead>
<tr>
<th>AGREE</th>
<th>DISAGREE</th>
</tr>
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<tbody>
<tr>
<td>37%</td>
<td>1%</td>
</tr>
<tr>
<td>34%</td>
<td>3%</td>
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</table>

SOURCE: ACCENTURE, GETTING TO EQUAL 2017

**UNLESS YOU INTRODUCE TARGETS YOU RARELY DRIVE CHANGE – BUT YOU MUST BE CAREFUL NOT TO DEVALUE WOMEN’S ACHIEVEMENTS OR ALIENATE MEN.**

KERRY SMALL, VODAFONE
We know from our annual GenZ study that UK graduates are increasingly attracted by flexible working practices\(^{10}\) and that more than three-quarters of women employed in the UK already use digital to enable them to work from home/flexibly\(^{11}\). But while our interviewees suggested that attitudes to more flexible working practices are shifting, there was also recognition that the pace of change at the very top of companies could be improved.

**Companies benefit from opening up their working practices** – but also from taking the time to understand how women want to work and their ambitions and priorities at different stages of their careers. Anna Cook at Sky believes the decision to adopt a particular working pattern should be left to the individual: “If a person thinks they can make flexible or part-time work and the role allows it, our job is to help support them.” Kerry Small at Vodafone measures her team on their outputs rather than on “how or where they do the work” and her company is encouraging people to work from home at least once a week.

**Consider policies such as flexible working, returner apprenticeships and shared parental leave**

**Incentivise your people on outputs, rather than inputs**

Motherhood remains a clear and persistent impediment for women in their careers. Ninety percent of working mothers have primary responsibility for childcare outside of working hours and more than half of UK working mothers aged 40+ have taken over a year out to raise children (53%), compared with just 17% of fathers\(^{12}\). Kerry Small at Vodafone notes that it’s easier for fathers to stay on a constant career path while mothers see their networks and skills atrophy. The roll-out of Shared Parental Leave should offer parents more choice in this regard, enabling men to take a more active role in parenting in the critical first year of birth or adoption, but the impact on gender equality has yet to be felt in the industry.

*Technology is rapidly lowering the motherhood barrier in many roles* and working mothers are more likely than peers without children to cite the career progression benefits of digital\(^{13}\). Of course, not every job can be done remotely, but new developments such as Uber-style ‘gig’ platforms for engineers could allow women to work when and where they want. As Anna Cook at Sky says: “With the right support structure in place, it’s very possible to work flexibly with today’s digital technology.” Emma McGuigan agrees that innovative solutions are needed – but that the industry first needs to break away from its orthodoxies and reimagine the problem: “We need to stop measuring employees as an overhead – not how much they cost to employ but on the value they bring.”

This focus on value has driven companies like O2 to introduce ‘returner apprenticeships’: bringing experienced women back into the workforce following career breaks. Not only do these women have much sought after skills such as high emotional intelligence, leadership and management, but they bring fresh perspectives and better reflect consumer diversity\(^{14}\). Valerie Hughes-D’Aeth at the BBC, cites women on career detours aged 50+ as a huge untapped source of key skills and capabilities including project management and multi-tasking. Christina Scott at News UK also stresses the importance of post-maternity refresher courses: “People lose their confidence having been off for a long time – particularly in technology where things move so fast.” And Kerry Small at Vodafone urges companies not to ignore the cadre of high-performing women who return to the workforce following a career break, but choose not to pursue a senior management career track; “these women can really make a difference to business performance from middle management – and need to be recognised and rewarded appropriately.”

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\(^{10}\) https://www.accenture.com/gb-en/insight-2016-uk-university-graduate-research

\(^{11}\) Getting to Equal 2017 – Accenture

\(^{12}\) Ibid

\(^{13}\) Ibid

\(^{14}\) https://www.ft.com/content/16ef6eb2-9a8d-11e6-8f9b-70e3cabccf8e

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*Don’t wear working part-time as a badge: you need to be clear about your skills and the value you bring.*

Emma McGuigan, Accenture

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*77% of women working in the UK use digital to enable them to work from home/flexibly*
Like many Western markets, the UK struggles to encourage girls to stick with STEM subjects at school through university. A STEM education is far from the only way into the TMT industry, but many reports show that digital and tech skills do help women advance in the workplace. For example, 37% of fast progressing women in the UK studied STEM subjects versus 28% of all women – and 78% of these high achievers have tech experience versus 66% on average.

The STEM stigma latches on early: Young people are likely to subscribe to the stereotypical view of a career in STEM such as ‘doing research’ (52%), ‘working in a laboratory’ (47%) and ‘wearing a white coat’ (33%). By university age, just 28% of female undergraduates would like to start or work in a digital, IT or technology company compared with 46% of their male peers. As Lisa Neale at Openreach says: “you need to start with 7-year-olds to really make a difference...this may seem young, but remember that children can use an iPad at the age of three!”

Industry leaders are acutely aware of the issue and recognise their unique position to affect change. For example, Sky run a ‘Get into Tech’ programme, an 8-week training programme for women to get them ready to compete in the apprenticeship or graduate pool, to help bridge the divide.

Companies could do more to attract young talent by breaking role stereotypes and by changing the way they phrase job descriptions: 67% of young people find innovative job descriptions (e.g. designing bridges, developing satellites) more exciting than traditional job titles (e.g. civil engineer, programmer). The industry also needs to address its deficit of female success stories: 73% of young girls believe that the science and technology sector lacks high-profile female role models.

Emma McGuigan believes the industry needs to revolutionise its entire recruitment process to attract more women. She advocates introducing AI to mitigate unconscious bias but also encourages companies to adapt their corporate messaging to better align jobs with what women are looking for in their careers: “it’s increasingly well known what women aspire to and what they want in an organisation – influencing their communities, working in teams and changing the world. They are much less driven by money or status.”

REIMAGINE RECRUITMENT APPROACHES TO BALANCE NEED FOR FEMININE AND MASCULINE CHARACTERISTICS

At senior levels, the industry is perfectly placed not only to break the STEM stigma, but also to offer women the tech-rich work that can help them advance. A study of 518 of the largest companies in the world, found that 32% of female board members in the industry have professional technology backgrounds, almost double the next highest (Health and Public Sector at 18%).

WE NEED TO FIX THE PROBLEM FROM BOTH SIDES – BOTH GETTING MORE GIRLS INTO STEM, BUT ALSO GETTING COMPANIES TO LOOK AT WIDER SKILLS BEYOND STEM FOR CERTAIN ROLES.

CHRISTINA SCOTT, NEWS UK
A CHALLENGE WORTH THE EFFORT

Cracking the gender diversity conundrum is one of the hardest, most intractable issues in business today. But as this report shows, attracting, progressing and retaining women – in management, customer-facing, or technology roles – offers a huge competitive advantage in terms of better decision making, deeper customer centricity and a more robust talent pipeline.

We cannot ignore the wider societal issues at play which hamper women from working, let alone in technology roles. Thankfully the debate here is loud and growing, but for UK TMT companies the message is clear: fail to recognise that 50% of your best (potential) customers, leaders and employees are women, and you are likely to be left behind.
ABOUT ACCENTURE CMT
Accenture Communications, Media & Technology helps companies connect with digital consumers, launch innovative products and services, increase revenues and streamline operations to reduce costs.

ABOUT ACCENTURE RESEARCH
Accenture Research uncovers disruptors, shapes trends and creates data-driven insights about the most pressing issues organisations face. Combining the power of innovative research techniques with a deep understanding of our clients’ industries, our team of 250 researchers and Thought Leaders spans 23 countries and publishes hundreds of reports, articles and points of views every year. Our breakthrough research is supported by proprietary data that guides our innovations and allows us to transform theories into real, practical solutions.

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