GENDER

Women 'in'Equality - Not Anymore!

Gender Diversity & Inclusivity trends in the IT-BPM sector

March 2016

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Summary

- Indian IT-BPM industry increasingly women centric - women constitute **51 per cent** of entry level hiring, and they have a **50 per cent higher chance** of getting IT-BPM job offers

Women in Indian IT-BPM industry:

- **Accelerating** into managerial positions

- Rapidly **moving up the corporate ladder and account for higher share of promotions** - maximum gains in the CXO category

- Increasingly **moving away from support roles** and growing in core business operations

- Achieving career growth through added **focus on training and development**

- Though Indian IT-BPM industry has made rapid strides in inclusivity and diversity, there is **headroom for further improvement; needs sustained CEO focus**

Indian IT-BPM: Re-defining the workforce

IT-BPM: Employment

3.7 million	IT-BPM employees
No. 1	Largest private sector employer
27 years	Average age
>10 million	Indirect employment

Geographical diversity

>50%	Employees from non-Tier I locations
>100	Nationalities in workforce
>170k	Foreign nationals
>40%	Headcount of global MNCs in India

Diversity & inclusivity

|	
~1.3 million	Women employees
~34%	Share of women in total employees
~28%	Female employees are primary bread earners
<1%	PwD employees

Women in Start-ups

~9%	Share of women founders
50%	Rise in share of women entrepreneurs (2015 vs. 2014)
77%	Founders are <35 years (average age)
$ **168** million	4X growth in funding for women driven start-ups in last one year

PwD: People with Disabilities
Source: NASSCOM

Participant profile

To assess the gender diversity and inclusivity situation NASSCOM and PWC conducted a dip-stick survey of NASSCOM members. We received responses from over 31 firms which account for 25 per cent of IT-BPM employee base. Following analysis is based on the survey responses.
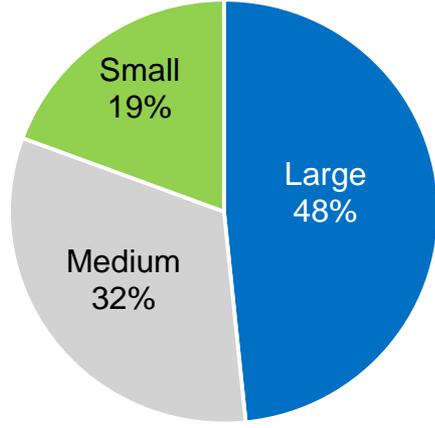
Participants by services offered

- BPM 39%
- Integrated 48%
- IT services 13%
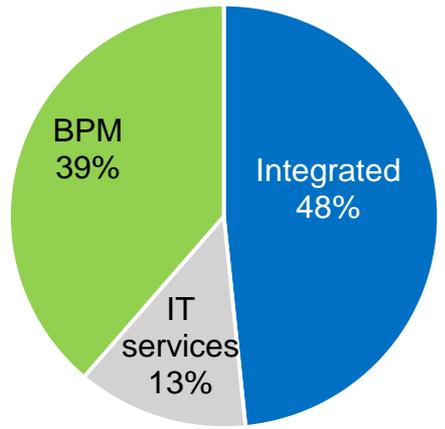
Participants by type of firm

- MNC 26%
- ISP 52%
- GIC 23%
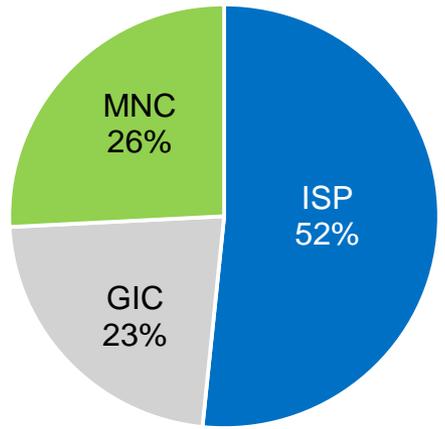
Participants by size of firm

- Small 19%
- Large 48%
- Medium 32%

Indian IT-BPM industry: Increasingly women centric

JOB OFFERS & RECRUITMENT

Entry level recruits (men) **49%**

Entry level recruits (women) **51%**

% of men applicants that get final offers **15%**

% of women applicants that get final offers **22%**

Women applicants have far higher success rates

✓ Women today constitute **more than half** of entry level hiring

✓ Women job applicants have a **50 per cent higher probability** of getting job offers

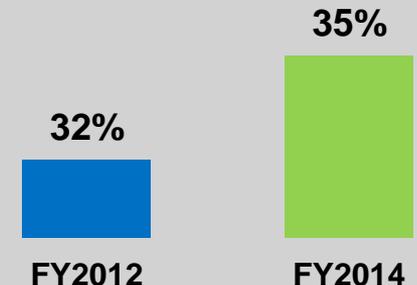### Attractiveness of Indian IT industry for women is improving

✓ Women constitute 28 per cent of job applicants to the Indian IT industry, **up by 5 per cent** over FY2012

✓ **35 per cent of all job offers** go to women applicants

% OF WOMEN JOB APPLICANTS & OFFERS TO TOTAL RECRUITMENT
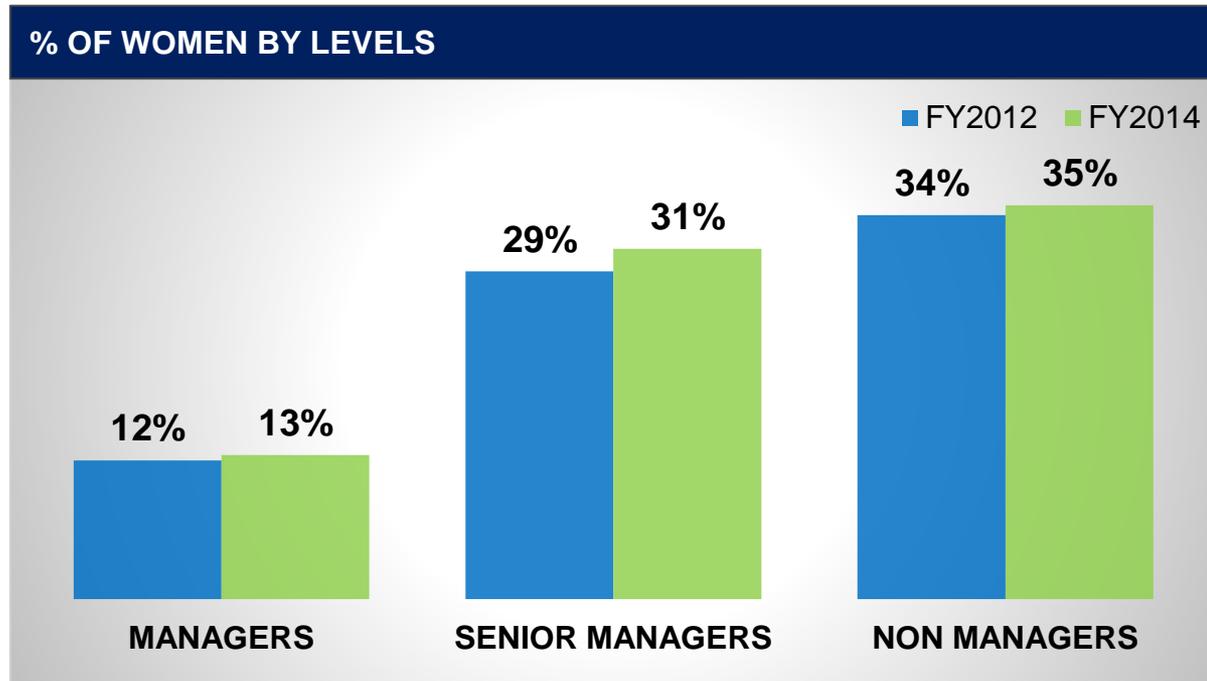
JOB APPLICANTS

- FY2012: 23%
- FY2014: 28%

JOB OFFERS

- FY2012: 32%
- FY2014: 35%

Source: NASSCOM
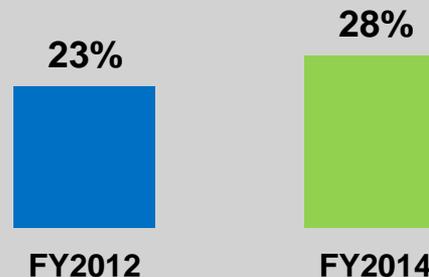
Women accelerating into managerial positions...

More women in Indian IT industry across levels

✓ Women enjoy a **higher representation** across all levels in the corporate pipeline

% OF WOMEN BY LEVELS

■ FY2012 ■ FY2014

	MANAGERS	SENIOR MANAGERS	NON MANAGERS
FY2012	12%	29%	34%
FY2014	13%	31%	35%

% OF MANAGERS IN THE WOMEN WORKFORCE

FY2012

21%

FY2014

23%

Women managers on the rise

✓ Women in overall **managerial roles** as a proportion of total women employees has **increased by 2 per cent** over FY2012

Source: NASSCOM

…And progressively moving up the corporate ladder

NASSCOM®

Personal ambition and corporate support driving growth

✓ With positive commitment of firms to increasing gender diversity and inclusivity, women **progressing up the employee pyramid constitute 26 per cent of promotions**

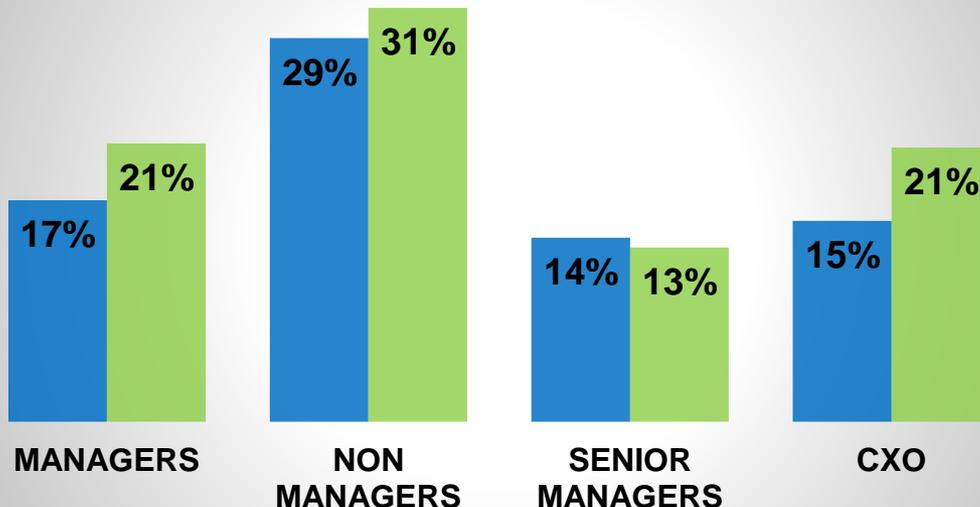## % OF PROMOTIONAL OFFERS FOR WOMEN

FY2012

25%

FY2014

26%

PROMOTIONS BY LEVELS FOR WOMEN

■ FY2012 ■ FY2014

Level	FY2012	FY2014
MANAGERS	17%	21%
NON MANAGERS	29%	31%
SENIOR MANAGERS	14%	13%
CXO	15%	21%

Promotions increasing across the entry and middle management, and executive levels

✓ Strongest improvement made by women employees in the **CXO** and **manager** category

Source: NASSCOM

Women are growing by focusing more on training & development, and on core business roles

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% OF WOMEN IN SUPPORT ROLES

FY2012

37%

FY2014

34%

Shift in the mind-set that women are mainly good at only support roles

✓ Over the last few years, clear trend of women **focussing less on support roles and more on core business roles**

✓ Within support roles- the main areas include **HR, administration, finance** and marketing

Women give more importance to learning and development

✓ On an average women spend **2-3 per cent more time than men** on training and development

✓ Average hours spent on training has **increased by 38 per cent** over FY2012, while that for men has only increased by 26 per cent

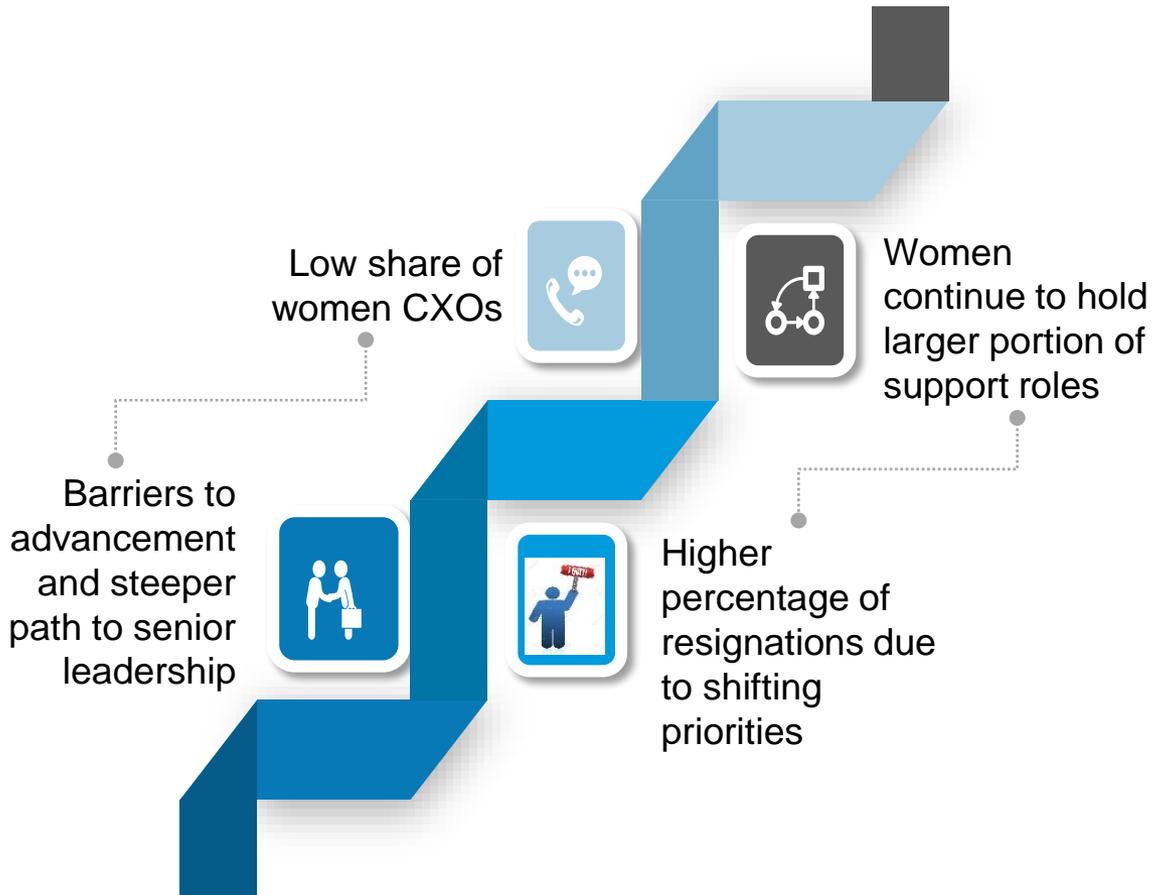## AVERAGE HOURS PER EMPLOYEE SPEND ON TRAINING

MEN

67

WOMEN

69

Source: NASSCOM

Challenges faced by women in the industry mirror those of corporate women worldwide

CHALLENGES

Low share of women CXOs

Women continue to hold larger portion of support roles

Barriers to advancement and steeper path to senior leadership

Higher percentage of resignations due to shifting priorities

✓ Disparity with men exists, though gap steadily narrowing

✓ While gender equality established at entry levels, women still constitute a far lower share of CXO roles

✓ Women continue to resign at a higher rate than men as they juggle multiple priorities

✓ Challenges faced by women need to be addressed in a systematic manner, requires sustained CEO focus

Source: NASSCOM

Industry focus shifts from inclusivity & diversity to empowerment

Excellence in Inclusion of PwD

- **Customised trainings:** sign language training for recruiters; manager and peer sensitisation

- **Policy enablers:** buddy program, inclusive induction program, interpreter support

- **Infrastructure support:** wheelchair, ramps, JAWS software, lenses, large monitors etc.

Excellence in Gender Diversity

- **Empowering women:** mentoring and developing leadership and networking skills

- **Policy enablers:** maternity management, career development, gender audits, women safety

- **Focused hiring:** recruiting & promote campus & experienced technical women talent

Innovative Programs

- **Beyond Gender and PwD:** mature age people, socially and economically disadvantaged, culturally and linguistically diverse indigenous people

- **Global initiative called 'Autism at Work'**: hire people with autism in collaboration with NGOS's and government bodies

Source: NASSCOM

The NASSCOM D&I Program

"Enable IT-BPM organizations to build a work environment that embraces diversity where employees, customers and other stakeholders thrive and succeed. "

- Encourage NASSCOM member companies to create and thrive in a cultural environment that supports diversity

- Create platforms of knowledge exchange across various forms of inclusion and across different cultural context for companies to share and learn best practices

- Conduct and support research and create actionable data that could indicate the trends in the industry as well as act as a benchmark to the companies in the industry

- Work with the government and the society to create a legal and commercial framework that supports initiatives promoting Diversity and Inclusion

- Communicate progress made in D&I area by the Indian IT-BPM industry to global firms (within and outside IT-BPM) and governments and be seen as the role model for inclusion efforts globally

NASSCOM's D&I Initiatives

Leadership pipeline wrt women

Safe workplace

Access to skilled resources

Inclusive culture

People with Disabilities (PwD)

Awareness & best practice sharing