



WOMEN IN TECH BRIEFING: A NEW CALL TO ARMS

INCLUSIVE
TECH
ALLIANCE

INCLUSIVE
BOARDS.

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Samuel Steel - Lead Researcher
Ieva Grudzyte - Research Associate
Andrei Racasan - Research Assistant
Matthew Latham - Research Assistant (Quants)
Phil Garcia - Tech Consultant
Philip Kasumu - Tech Consultant
Tana Forte - Director of Strategic Partnerships
Katie Petrou- Conference Co-ordinator
Elizabeth Adeniran - Editor

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Glossary

Director refers to Board of Directors



EXECUTIVE SUMMARY

The UK tech sector is experiencing an accelerated rate of growth. According to the Mayor of London's promotional company, London & Partners, the number of new tech firms registered in the United Kingdom has increased by 14% since 2017. However, the sector is facing the dual challenge of a skills crisis and a gender deficit. There is currently close to 600,000 unfilled tech vacancies in the United Kingdom. This is predicted to almost double to 1 million by the year 2020. Our analysis of occupational employment data shows that there is also an existing shortfall of 400,000 women in the sector. The Inclusive Tech Alliance (ITA) is therefore advocating the mobilisation of close to 1 million women to solve these challenges.

A NEW CALL TO ARMS

It is predicted that the current number of vacancies in tech will almost double, reaching an estimated 1 million unfilled positions by the year 2020.

Assuming a state of 'gender parity' ITA believes that close to 1 million women should be mobilised to meet both the current and future skills needs in the sector.

ITA found that an additional 0.4 million women would be needed to correct the current state of gender imbalance in the sector in order to achieve a state of 'gender parity' across all tech-related occupations.

Our analysis of occupational data, published by the Office for National Statistics, shows that women account for around 16.8% of those employed in the tech sector. Fewer still are employed within occupations such as programmers and software developers (12.5%) and IT business analysts, architects and system designers (14.1%).

PIPELINE CHALLENGES

Pipeline issues, such as the low take-up of female students studying STEM (Science, Technology, Engineering and Maths) subjects at university are well documented. In the 2017/18 academic year, only 17.6% of Computer Science students. These issues continue to be perpetuated within senior leadership positions. Our analysis of the UK's fastest growing tech firms according to Deloitte shows that over half (56.0%) of male executives graduated with a STEM degree, compared to only 14.3% of women.

WOMEN IN LEADERSHIP

As few as 4.4% of CEOs (Chief Executive Officer), 15.7% of executives, and 6.2% of directors in the fastest growing tech firms by annual revenue are occupied by women. Senior women in the sector were more likely to be found in 'functional' as opposed to 'technical' executive roles. Over half of the firms we analysed had 'all men' executive teams, whilst nearly a quarter (22%) had 'all men' on their Boards.

Whilst not a primary focus of our research, the intersectionality between ethnicity and gender and gender and socioeconomic backgrounds revealed some interesting findings. In terms of ethnicity, all women directors we analysed were from white backgrounds, whilst only 6.5% of executives were from BAME backgrounds overall. It is therefore important to consider ethnicity and gender as part of the wider strategy for solving the skills crisis in UK tech. Secondly, our findings showed that, compared to their men counterparts, senior women in the sector were far more likely to have attended private schools and universities within the Russell Group. Greater efforts are therefore needed to ensure that women from all socioeconomic backgrounds are encouraged to consider tech as a 'career of choice'.

BREXIT IMPACT ON THE UK TECH SECTOR

Britain's impending exit from the European Union threatens to place further strain on the availability of highly-skilled tech workers. It is estimated that one third of the UK tech workforce originates from other EU countries. Inclusive Tech Alliance also found that 11% of directors in the UK's fastest growing tech firms come from countries within the EU.

A CALL TO ACTION

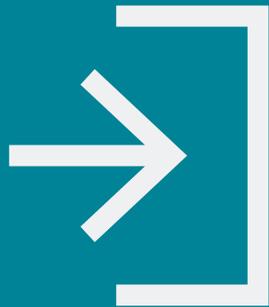
Lessons from the past show that change is possible. By the end of the Second World War some 7 million women had been mobilised to support the war effort. Hundreds of thousands of women were called to work in Britain's factories and industries, performing in roles traditionally filled by men. Some thirty years later, in 1975 half of UK women were in employment.

Inclusive Tech Alliance believe now is the time for a coherent strategy to mobilise the women in the workforce in order to alleviate the current skills crisis in UK tech.

KEY FINDINGS

1M

WOMEN ARE NEEDED TO ACHIEVE A STATE OF GENDER PARITY IN THE TECH SECTOR IN ORDER TO FILL CURRENT AND PREDICTED VACANCIES



7%

OF WOMEN EXECUTIVES ARE FROM BAME BACKGROUNDS AND NONE ARE DIRECTORS IN THE FASTEST GROWING TECH FIRMS*



4%

OF CEOS (CHIEF EXECUTIVE OFFICER), 16% OF EXECUTIVES, AND 6% OF DIRECTORS IN THE FASTEST GROWING TECH FIRMS ARE OCCUPIED BY WOMEN

67%

OF SENIOR WOMEN IN THE UK FASTEST GROWING TECH FIRMS ATTENDED RUSSELL GROUP UNIVERSITIES COMPARED TO 38% OF MEN



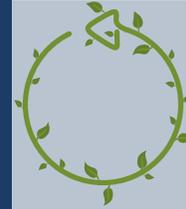
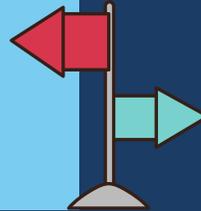
* in the Deloitte fastest growing tech firms by annual revenue

RECOMMENDATIONS

THROUGH CONSULTATION WITH WOMEN AT THE ITA WOMEN IN TECH LEADERSHIP CONFERENCE

CAREERS ADVICE AND GUIDANCE FOR YOUNG WOMEN

There is a clear need for improved Careers, Advice and Guidance (CIAG) at early-years, secondary and further education to better promote tech careers to young women. This should feed into more tailored entry-level programmes such as apprenticeships and graduate development schemes. Educational professionals and family networks should also have a greater involvement in encouraging young women to consider tech as a 'career of choice'.



RETURNER PROGRAMMES

The tech industry should develop programmes to better support career returners (post-maternity), including a focus on continued skills development and making more effective use of transferable skills developed in non-STEM industries. This would address some of the current skills deficit.

MENTORING

The tech sector should develop mentoring and career coaching for women looking to progress to positions of leadership in tech. There is currently a clear drop-off for women in c-suite roles, particularly in CEO positions.



IMPROVE FLEXIBLE WORKING AND POST-MATERNITY SUPPORT

Women returning from maternity leave should be offered flexible working options. There should also be more focus on creating inclusive cultures and fostering a positive 'work-life' balance.

TARGETED RECRUITMENT ACTIVITIES

The tech sector should launch a targeted recruitment campaign aimed at encouraging more women into the industry. Internally, tech firms should aim to eliminate unconscious bias' in recruitment practices and implement initiatives such as 'name-blind recruitment'.



METHODOLOGY

LITERATURE REVIEW

Inclusive Tech Alliance (ITA) conducted an extensive review of available online literature, published reports and other sources relating to the UK tech sector. Our findings were grouped thematically, covering the recent growth in UK tech and the issue of current and future skills shortages. Using gender as a lens, we reviewed the challenges and disparities faced by women in tech leadership and the wider tech workforce. In light of Britain's proposed exit from the European Union, ITA also reviewed literature concerning the impact of Brexit on the availability of skilled tech professionals. Finally, we reviewed women's involvement within UK industries in its historical context, charting the growth of women's employment from the Second World War through to the present day.

PRIMARY RESEARCH AND DATA ANALYSIS

Inclusive Tech Alliance conducted a detailed diversity survey, analysing the gender, ethnicity, age profiles, and educational and socioeconomic backgrounds of Boards, directors and executives of the Deloitte's 2018 fastest growing tech firms in the UK ranked by calculating the three-year revenue growth percentage.

The information collected was corroborated with available data including corporate websites, Companies House records, online professional profiles and other sources.

There is currently no accepted determinant for analysing socio-economic background. Inclusive Tech Alliance' research team developed a bespoke socio-economic index using available secondary data.

Our socio-economic index eliminates the problematic issues faced with primary data collection for socio-economic background (self-identification). We created a detailed profile of socioeconomic backgrounds through the lens of educational backgrounds (including school type and university education). We employed a ranking index to segment school backgrounds by comprehensive and public. For universities this was segmented by Oxbridge, Russell Group, Non Russell Group and International institutions.

SECONDARY RESEARCH AND DATA ANALYSIS

Firstly, Inclusive Tech Alliance reviewed current estimates for the number of unfilled tech vacancies both now and in the future.

Secondly, we combined the current gender deficit with the future estimated number of vacancies in the sector. We analysed Office for National Statistics employment statistics (April-June 2018) across tech-related standard occupational classifications. We also compared total employment in tech roles for both men and women to calculate the current level of gender imbalance in tech.

RECOMMENDATIONS

During the Women in Tech Leadership conference, March 2019 we collected recommendations from the delegates in attendance following a presentation on the key findings of the briefing. The recommendations collected from 280 senior women in tech was collated and analysed. The key themes make up the recommendations featured in this briefing.



UK TECH: A GROWING SKILLS SHORTAGE

THE CURRENT CHALLENGE

Since 2017 the number of new tech companies registered in the United Kingdom has increased by 14%, with 11,864 software development and programming businesses incorporated in 2018 alone. London, recently named as the top European city for global tech talent, attracts more European and non-EU tech professionals than any other major city within the European Union. The capital was home to 357,900 software developers in 2018. London also showed the highest number of annual incorporations at 4,752, however the fastest rate of growth is in the North West, which saw a 48% increase in the number of new tech companies. The city of Manchester now has a thriving e-commerce cluster, which includes 'In Touch', an online training and networking business, ranked nineteenth in Deloitte's annual technology fast growth firms.

The free movement of EU labour has traditionally provided a source of talent for UK tech firms. In the past year alone the UK has fostered five new billion-dollar tech companies and is home to 25 of Europe's most successful tech firms.

Technology founders come to the UK from across Europe (and internationally) to launch and grow their businesses. However, the tech sector is now facing a potential skills crisis with UK's impending exit from the EU.

THE UPCOMING CHALLENGE

The "Mind the Gap" report published by 'Hired' showed that Brexit could widen the UK's tech skills gap. In 2016 one in three people in the UK tech sector originated from other EU countries. Resulting gaps in the supply and demand of vital skills may prevent the sector from growing further. The Government's UK Digital Strategy, published in 2017, stated that the UK will require an estimated 1.2 million new technical and digitally skilled workers by the year 2022 to support growth in the sector.



LEADERSHIP IN THE FASTEST GROWING FIRMS

SENIOR LEADERS

Our analysis found that women accounted for just 15.7% of executive team members. however, half of all executive teams surveyed had no women at all. Women from BAME (black, Asian, and minority ethnic) backgrounds accounted for 6.5% of all executives.

The proportion of women directors was lower, accounting for just 6.2% of all directorships in the fastest growing tech firms. They were also concentrated in a small number of tech firms; only 22% of the tech Boards we examined had any women directors. None of the women directors examined were from a BAME background.

Male executives are particularly concentrated amongst Chief Executive Officer (CEO), and other c-suite roles. Women typically occupied senior functional roles including marketing, HR, and general counsel. **As few as 4.4% of Chief Executive Officer (CEO) roles were held by women and 95.6% were male CEOs.**

EDUCATIONAL BACKGROUNDS

Our analysis of educational backgrounds is used as a statistical proxy to understand the socio-economic background of executives and directors in the fastest growing tech firms.

As few as 4.4% of Chief Executive Officer (CEO) roles were held by women, 95.6% were male CEOs.

Inclusive Tech Alliance's findings show that just over half of tech executives (52%) attended state comprehensives, 10% attended grammar schools whilst over a third (38%) attended independent schools. In comparison to men, women appeared to be more likely to have attended private schools. Of the women who provided UK schooling information, 57.0% went to private schools in comparison to 34.9% of men. This suggests that women executives in the tech sector come from more 'privileged' educational backgrounds but are still less likely to hold the position of CEO, relative to men.

WOMEN EXECUTIVE SCHOOL TYPE - SOCIO-ECONOMIC BENCHMARK

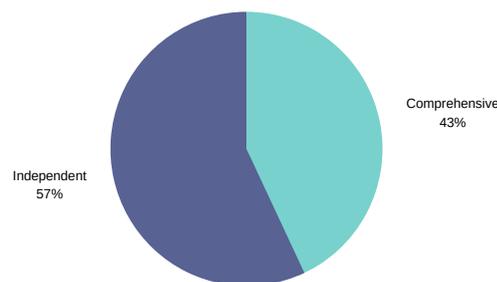


FIG 1: Women executives in UK Tech sector socio-economic background using school type as an index measurement

Directors in the tech sector were less likely to have attended state schools compared to the executive teams. Around 3 in 5 tech directors (60.5%) attended independent or grammar schools. Two fifths (39.5%) attended comprehensive schools. With so few women directors in tech there are few meaningful comparisons between men and women educational backgrounds, however it is worth noting that all women directors with available data had attended to independent school.

Analysing university backgrounds shows a similar pattern of 'privilege'. Around two fifths of executives attended non-Russell Group universities, whilst 42.6% attended universities within the Russell Group. A further 17% attended Oxbridge (Oxford or Cambridge university).

MEN EXECUTIVE SCHOOL TYPE - SOCIO-ECONOMIC BENCHMARK

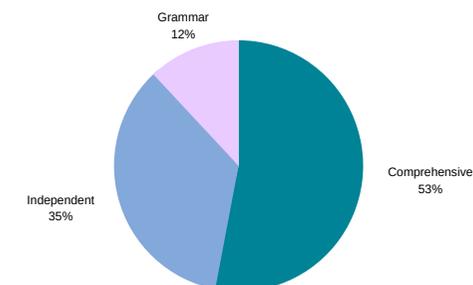


FIG 2: Men executives in UK Tech sector socio-economic background using school type as an index measurement

Women executives were more likely to have attended Russell Group (RG) universities compared to their male counterparts; 67% of women attended RG universities compared to 38% of men. However, only 6.7% of women executives attended Oxbridge compared almost one in five (19%) of men.

Tech directors were more likely to have attended RG universities (39.8%) compared to those on executive teams. Almost a third (31.7%) of directors attended Oxbridge institutions. The small number of women directors in the data analysed were more likely to have attended RG universities compared to their male counterparts. As with the executive teams it appears that women from more prestigious universities are more prevalent within tech directorships.

DIRECTOR AGE PROFILES

The average age of tech directors is 46, the youngest director being 25 and the eldest aged 75. The majority of tech directors were under the age of 50. Women directors were slightly younger than average, with a mean age of 44. The youngest female director was 34 while the oldest was 56.

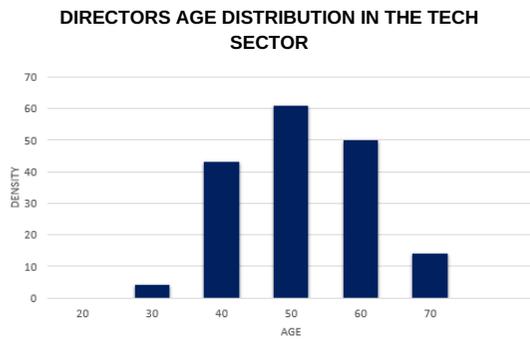


FIG 3: Director age distribution by density

COUNTRY OF ORIGIN

More than one in ten (11.3%) directors originated from EU countries (excluding the UK). Over two thirds (67.3%) of tech executives were primarily educated in the United Kingdom. Women tech executives were more likely to have originated from the UK (72.5%) compared to their male counterparts (66.7%). The next most common country for each gender in terms of nationality or educational background was the USA (13.6% of women and 11.9% of men). Similarly, 58.5% of directors had both been educated and resided in the United Kingdom; 15.5% were from the USA.

DIRECTORS COUNTRY OF ORIGIN (%)

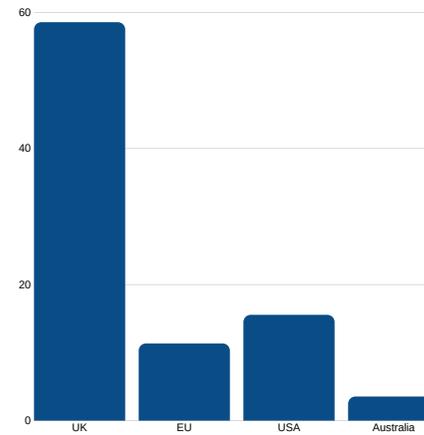


FIG 4: Director Country of Origin by percentage



STEM SUBJECTS AND TECH

We found that half of tech executives studied a STEM (science, technology, engineering and maths) course at university, with the next most popular degree types being business-related subjects and humanities.

In line with historic trends; men constituted the majority of STEM graduates working in executive roles – 56.0% of men executives studied a STEM degree, compared to only 14.3% of women. A higher proportion of women studied humanities; 38% compared to 9.8% of men. The overarching difference between men and women executives was a trend for men to focus on more technical undergraduate degrees, including those with a STEM focus

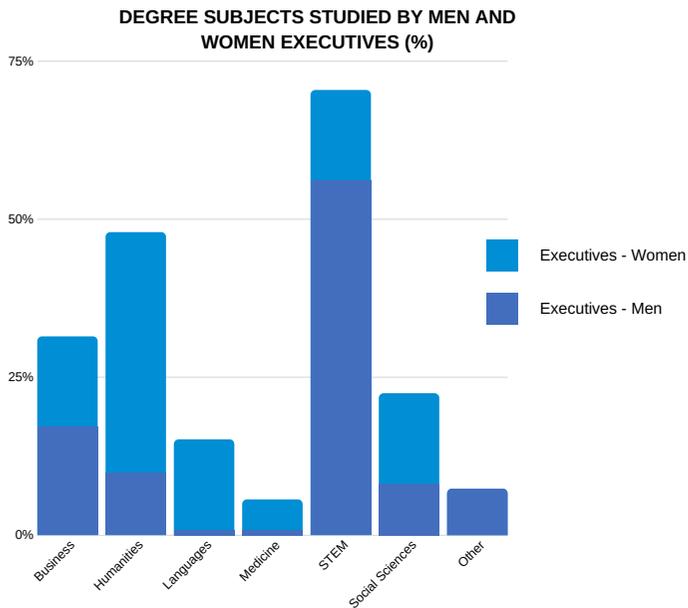


FIG 6: University degree subjects: Men and Women Executives in percentages

STEM SUBJECTS STUDIED BY EXECUTIVES (%)

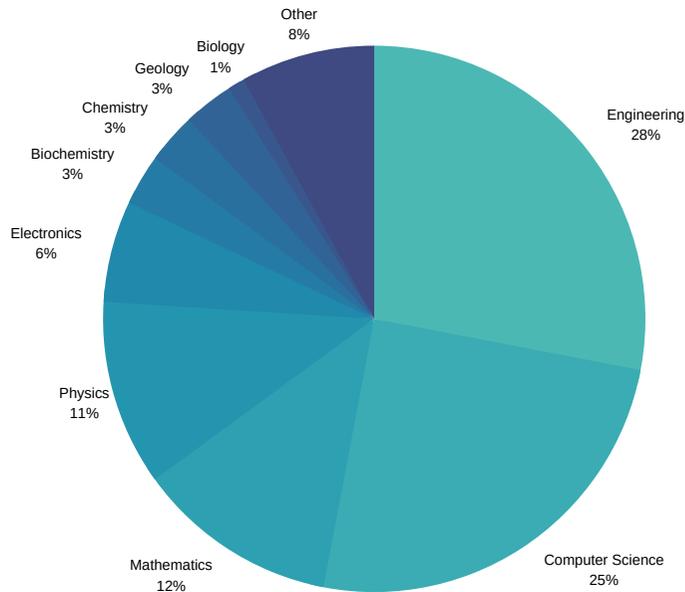


FIG 5: STEM subjects studied by executives in UK Tech sector

The most common STEM degree among executives was engineering (27.8%), followed by computer science (25%). Mathematics and Physics were also commonplace, comprising 12.5% and 11.1% respectively.

For tech directors a very similar pattern to the executives emerged, with STEM being by far the most popular degree category (42.2%). This is followed by the Social Sciences (17.2%) and Business-related degrees (16.4%).

STEM SUBJECTS STUDIED BY DIRECTORS (%)

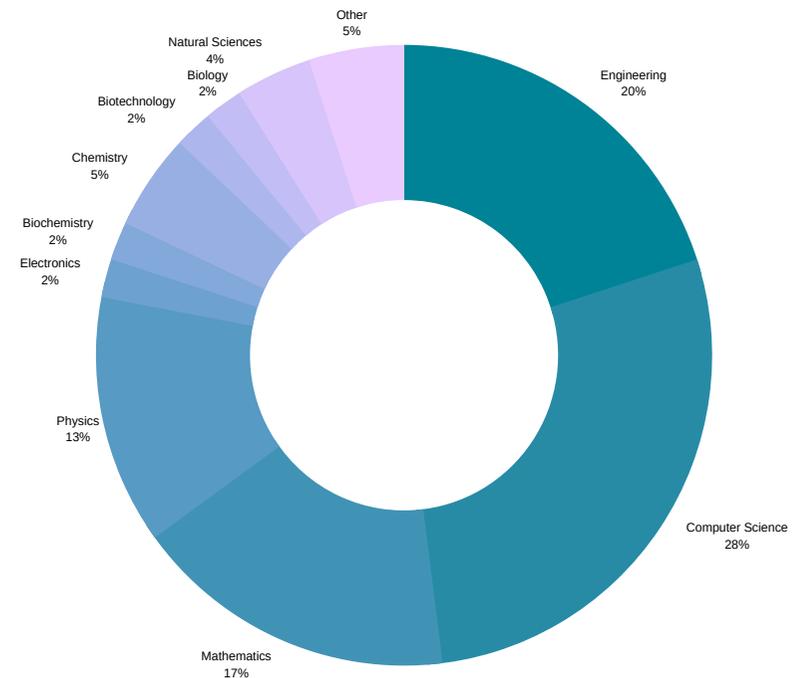


FIG 7: STEM subjects studied by directors in UK Tech sector



STEM SUBJECTS AND TECH - BOARD MEMBERS

In contrast to the executives there were few significant differences in the subject preferences of men and women Board members. In both genders, STEM subjects were the most common, with business related studies and the social sciences accounting for other major subject groups.

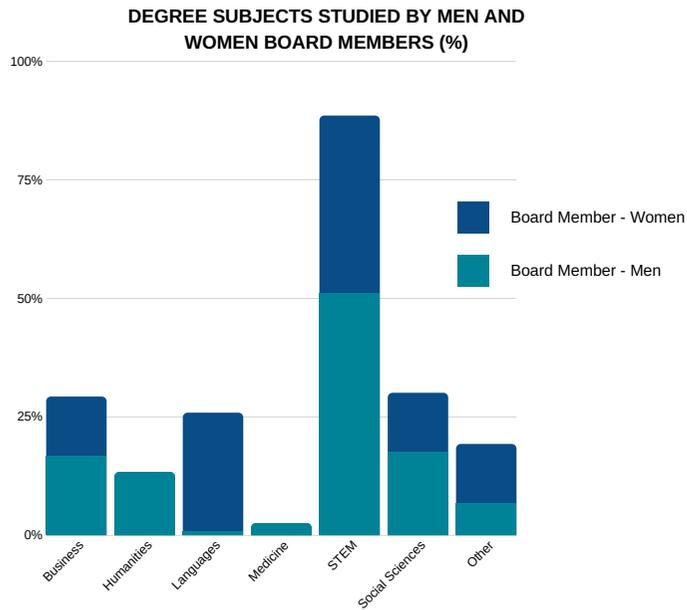


FIG 8: University degree subjects: Men and Women Board members in percentages

POSTGRADUATE STUDIES

Business-related qualifications were more commonplace at postgraduate level, accounting for almost two thirds (60%) of the qualifications among tech executives. MBA courses were particularly popular, almost a third of all business-related postgraduate qualifications. The prevalence of STEM subjects retained a degree of popularity as a postgraduate route, totalling 30% of the postgraduate qualifications taken among executives.

Among the postgraduate studies completed by directors almost a third (60.9%) were in business related subjects, of which three quarters (74.4%) were MBAs. As with undergraduate degrees, there aren't significant differences between men and women directors with both genders following similar business or STEM postgraduate degree pathways.

POSTGRADUATE DEGREE SUBJECTS STUDIED BY MEN AND WOMEN EXECUTIVES (%)

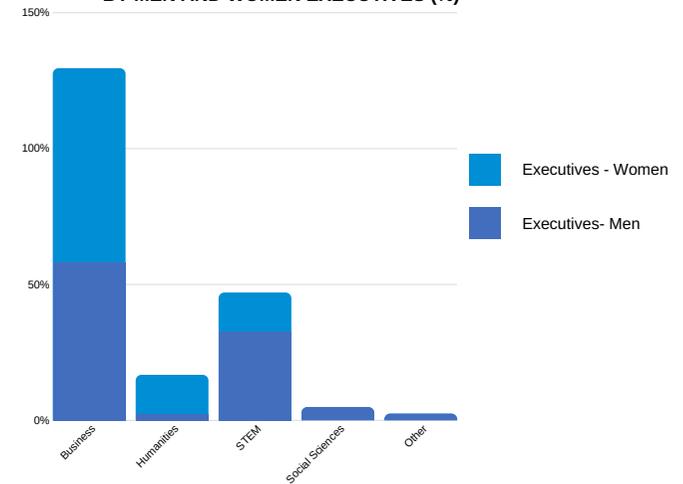


FIG 9: Postgraduate degree subjects: Men and Women Executives in percentages

POSTGRADUATE DEGREE SUBJECTS STUDIED BY MEN AND WOMEN DIRECTORS (%)

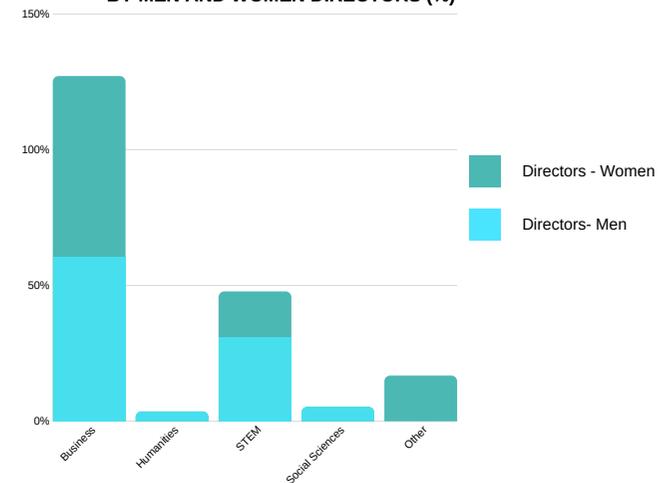


FIG 10: Postgraduate degree subjects: Men and Women Executives in percentages

THE VACANCY GAP

Tech London Advocates 2016 report on diversity in tech suggested that demand for digital skills is growing so rapidly that there will be insufficient numbers of people to fill these vacancies, even at the current rate of growth. In order to create a sustainable ecosystem that will secure the UK's future tech growth, we firstly need to close the current gap between talent and employers. The shortage of people willing to take on these positions is most likely not because we do not have enough specialist but more likely, because women appear to be unmotivated to choose the technology sector as a potential pathway to pursue their career. The recent Tech London Associates survey also suggested that a fifth of companies within London's tech community employ no women at Board level, a figure which is reflected at all levels in UK tech.

WOMEN IN TECH BY OCCUPATION IN NUMBERS
AND CURRENT DEFICIT (000s)

| Women in Tech by occupation | Women (000s) | % | Current Deficit (000S) |
|---|--------------|-------------|------------------------|
| IT Specialist Managers | 34 | 17.8 | 61 |
| IT project and Programme Managers | 24 | 31.3 | 14 |
| IT Business Analysts, Architects and System Designers | 20 | 14.1 | 50 |
| Programmers and Software Development Professionals | 42 | 12.5 | 127 |
| Web Design and Development Professionals | 18 | 30.1 | 12 |
| Other Information Technology and Telecommunications Professionals | 27 | 14.0 | 70 |
| IT operations Technicians | 25 | 22.0 | 32 |
| IT User Support Technicians | 20 | 17.2 | 39 |
| Information Technology and Telecommunications Directors | 14 | 13.8 | 37 |
| TOTAL: | 224 | 16.8 | 442 |

Table 1: Women in Tech by Occupation, Office for National Statistics, Employment by occupation April to June 2018



WOMEN IN STEM: AN HISTORICAL VIEW

The Second World War saw one of the greatest workforce mobilisations in the history of the United Kingdom. From early 1941, women between the ages of 18 and 60 were required to register for work to support the war effort. Unmarried women between the age of 20 and 30 were given a choice of working in the services or industry. Propaganda slogans encouraging women to "Come into the Factories" saw many women joining many industries for the first time. Women working in the services were engaged in a number of strategically important roles ranging from the compilation of weather reports and aircraft maintenance to intelligence-based roles. The Women's Royal Naval Service (WRNS) recruited and trained women to serve in land-based roles to release men for naval service. By 1943, there were 74,000 women serving in the WRNS, including a special unit of women based at Bletchley Park, operating machines used in code-breaking. By 1944 over a third of the UK civilian population had been engaged in war work, including 7 million women.

More than two centuries after the birth of Ada Lovelace, commonly regarded as the world's first computer programmer, digital technologies now span a range of industrial sectors, such as farming, automatics, shipping, teaching, healthcare, transport, education, retail, and logistics. During World War II, 182,000 women were employed in the Women's Auxiliary Air Force, whilst more than a quarter of a million were engaged in the Auxiliary Territorial Service, were trained to perform technical roles traditionally filled by men.

The post-war years have seen unprecedented numbers of women entering the labour market, largely driven by significant changes in women working patterns and lifecycle trends. Women are now far less likely to drop out of the labour market upon having their first child. For example, only 41% of women born in 1958 were still in work two years after the birth of their first child, compared to 58% of women born in 1970. The proportion of working-age mothers in paid employment has also risen from 50% in 1975 to almost three-quarters (72%) in 2015

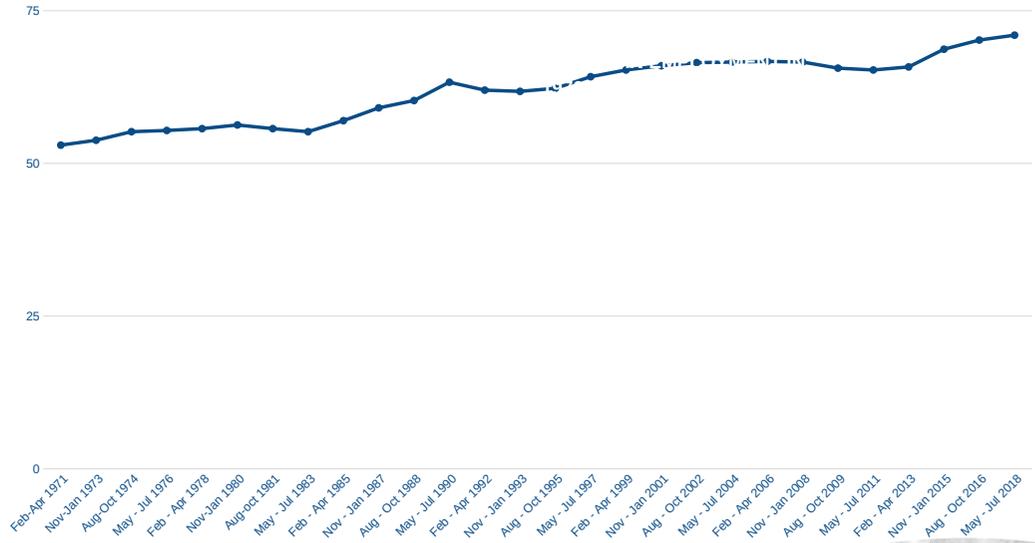
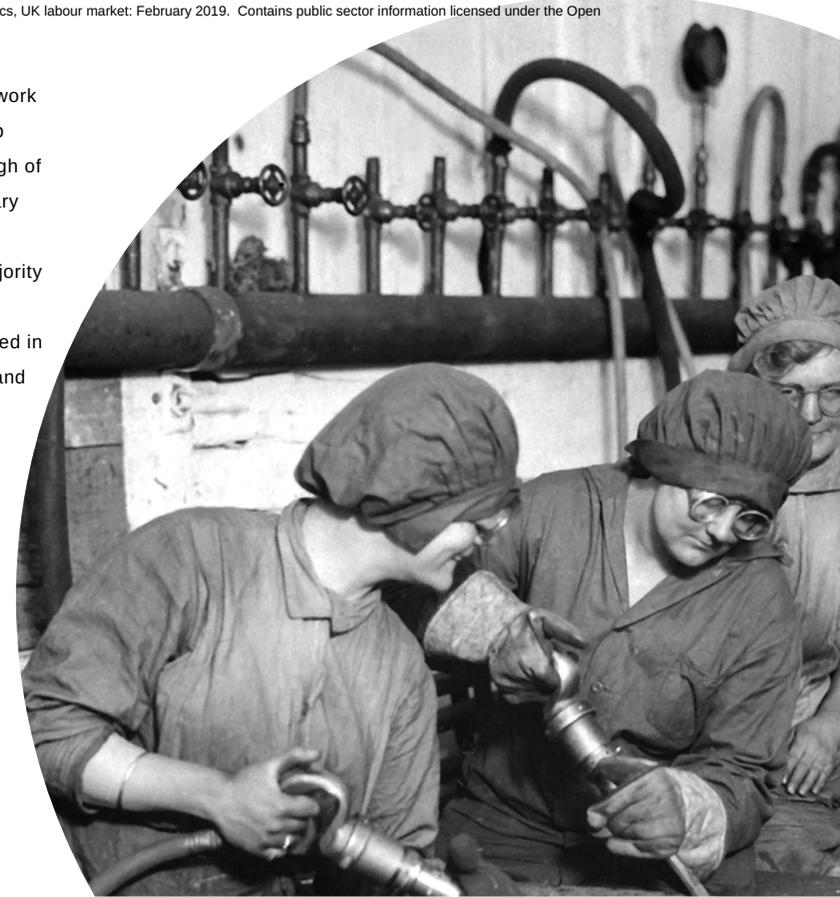


Fig 10: Figure 1 Adapted from Office for National Statistics, UK labour market: February 2019. Contains public sector information licensed under the Open Government Licence v3.0.

The number of women aged 16-64 in work continues to increase year-on-year, up from just 52.8% in 1971 to a record high of 71% of women employment by February 2019. Despite the record high level of women in employment in 2019 the majority of workers within the tech sector were men. Of the 1.3 million people employed in Professional Information Technology and Telecommunications occupations just 165,000 (16.5%) were women.



CONCLUSION

Inclusive Tech Alliance advocates that close to 1 million women should be mobilised in a 'new call to arms' designed to alleviate the growing skills crisis and diversity deficit in the UK tech sector.

WOMEN IN LEADERSHIP

Women are underrepresented in executive roles, and significantly more so within directorships and CEO positions. Our findings suggest that fewer professional women occupy technical roles such as 'Chief Technology Officer', whereas a higher proportion of women held senior executive positions across a range of HR, marketing and legal roles. The results of our analysis suggest that educational background, including the lower proportion of women studying STEM subjects, is likely to have an adverse impact on the number of women progressing to CEO positions and technical directorships.

An interesting outcome of our analysis showed that senior women in the sector were far more likely to have attended private schools relative to their men counterparts. It also followed that women directors and executives were also more likely than men to have attended Russell Group universities.

The reasons behind this are unclear, however it is possible that women simply have to 'work harder' to attain senior leadership positions within tech. The findings may also mask inherent pipeline issues that could potentially discourage women from less privileged backgrounds from considering tech as a 'career of choice'.

THE EUROPEAN CONTEXT

More than one in ten directors in the fastest growing tech firms come from EU countries. Coupled with estimates that one in three people working in the UK tech sector originated from other EU countries, it is likely that the UK's forthcoming exit from the European Union is likely to have a negative impact on the future supply of skilled tech professionals.

LEARNING LESSONS FROM HISTORY

The number of women being trained in STEM industries has fallen behind the rate of growth in the tech sector, a disparity that has continued since the end of the Second World War when thousands of women were recruited and trained to work in industry through a concerted national campaign.

Despite record numbers of women now in work, greater efforts are needed to address the problems in the women technology pipeline and to tackle systemic cultural issues for women in the tech sector. A coherent strategy is also needed to mobilise the women workforce to take on future tech roles to alleviate the current 'skills crisis' in UK tech as part of a 'new call to arms'.





WHERE NEXT?

Understanding the 'drop-off' point for women in tech: Further research is needed to investigate why women leave the tech industry during the later stages of their careers. We also need to understand the potential barriers that may prevent women from returning to careers in tech following career breaks.

Focus on largest / most profitable tech firms: More research is needed to understand the representation of women in the UK's largest and most profitable tech firms and the potential linkages between diversity and profitability. We also need to develop a deeper understanding of the proportion of women at different levels of seniority and the 'glass ceilings' that prevent women from attaining positions within senior leadership.

Regional and International Contexts: The UK has some particularly active regional tech clusters, but currently there is little understanding of gender diversity at regional levels, particularly within SME's. It is also important to understand how international 'best practice' approaches from regions such as South Asia could be used as a model to increase the number of women in UK tech.

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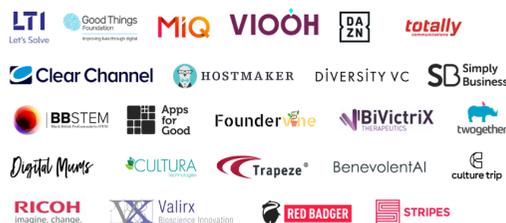
ABOUT ITA

The Inclusive Tech Alliance (ITA) is a membership body dedicated to increasing diversity in the tech sector, working alongside a variety of stakeholders.

To achieve its aims the objectives of the alliance (ITA) are two-fold:

1. To improve all strands of diversity and inclusion within the UK tech sector, with a specific focus on leadership.
2. To tackle the technical skills shortages the country is facing by combining efforts and sharing best practice.

ITA MEMBERS



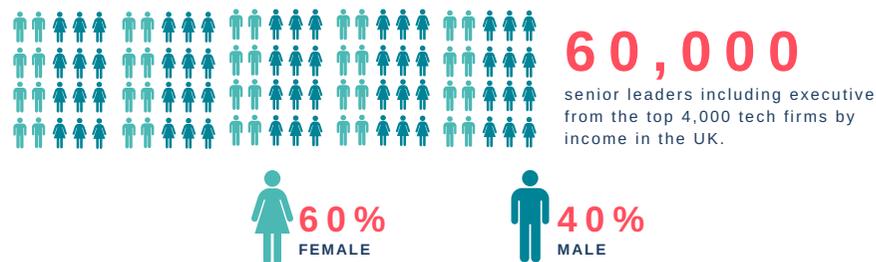
ITA is powered by Inclusive Boards and is a collaboration with the Financial Times. In November 2018, the Inclusive Tech Alliance officially launched at the House of Commons. Our special 8-page report "Ethnic Diversity in Technology" was also featured in the Financial Times, alongside our inaugural list of the 100 Most Influential BAME leaders in the UK tech sector (#IB100).

ABOUT INCLUSIVE BOARDS



Inclusive Boards (IB) is a boutique executive search firm based in London and the Midlands. We were set up to support organisations and sectors in their efforts to develop more diverse boards, senior leadership teams and stronger governance structures. Our services include Executive Search, Advisory, and Conferences. We also deliver Executive Training and have a flagship tech campaign - The Inclusive Tech Alliance.

OUR REACH



SOME OF OUR CLIENTS



UPCOMING ACTIVITIES

EXECUTIVE LEADERSHIP PROGRAMME

Collaboration

Participants from across UK Plc will have the opportunity to collaborate with senior and diverse leaders across different sectors.



Flexibility

Face-to-face and online interactions.



Expert-led

Residential led by senior academics including from Oxford and Cranfield. Opportunities to discuss a wide range of topics, theories and scenarios to further embed learning.

The programme is delivered over nine months and consist of 2 residentials, 3 face-to-face interactions and webinars led by a senior leader and/or an academic.

CONTACT US



0207 267 8369



Hello@inclusiveboards.co.uk



www.inclusivetechalliance.co.uk



@TechAllianceUK

