

WISE Workshop
ICT Market Opportunities
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A Group of **consulting companies** specialized in

 the different areas of **commercial intelligence**

 **strategic** consultancy

 **operational** services












- **INMARK** employees: more than **200 people**, including **senior executives, consultants and researchers**, with revenues of **EUR 30 million**.
- **INMARK** delivers services to more than **400 corporate clients**.

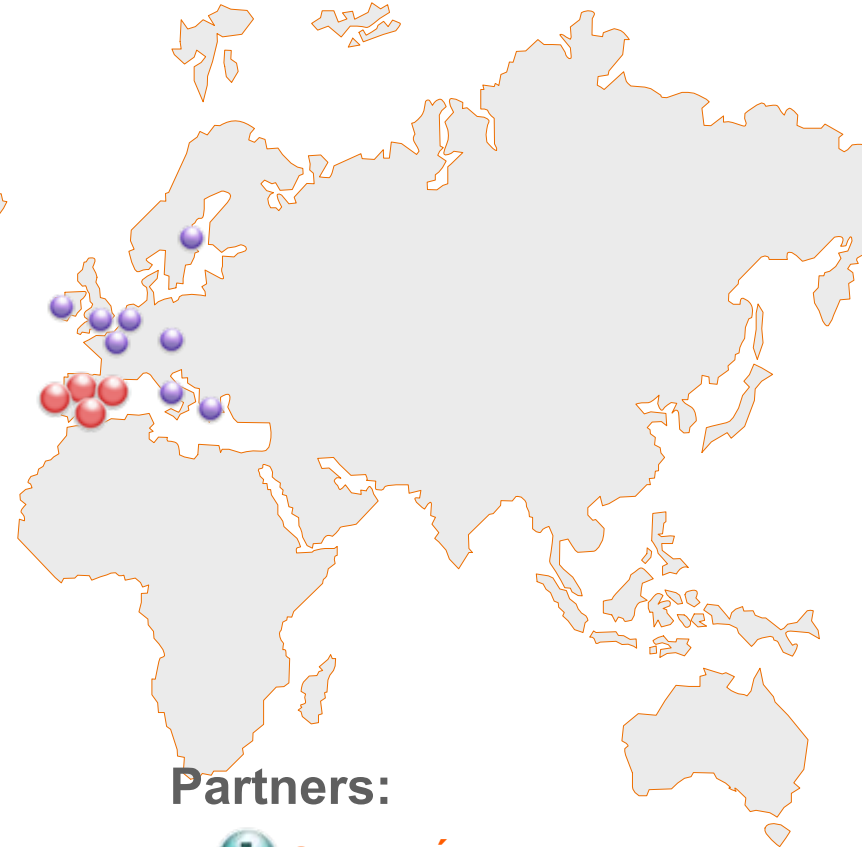


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-  **Partnership Development**

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-  **Organisational development**

-  **Corporate culture studies**
-  **Service Quality assessment**

-  **Alternative sales networks**
-  **Telemarketing**
-  **Temporary staffing services**



*Women do not want to be seen
as receiving special treatment....*

WISE tries to help women to ***promote themselves*** in an effective way, take advantage of ***ICT business opportunities*** and become aware of ***work-life balance***

WISE provides insight into the reasons of gender gap in ICT

The WISE team:

Inmark, Spain (Management and Business Consultancy)

• **TermNet**, Austria (International Network for Terminology)

• **Intercollege**, Cyprus (Private University)

• **EBS**, Estonia Business School

• **Information Processing Centre – OPI**, Poland (Research Centre)

• **European Multimedia Forum – EMF**, UK (the main European non-profit organisation promoting the competitiveness of digital media industries)



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3. *ICT market opportunities*

3.1 ICT as driver of modern economy

3.2 Gender gap in ICT

3.3 ICT market in Europe

3.4 Women in ICT employment

3.5 ICT Opportunities for women

- Part-time work
- Certifications

3.6 WISE findings on gender gap in ICT

3.7 ICT Networking



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- The ICT industry is increasing its share in the global economic and accounted for half of productivity gains in modern economies.
- ICT industry is a backbone sector for the EU economy
 - 50% of productivity growth in Europe (80% in US)
 - Broadband fast take-up in Europe: 60 million subscribers in Jan 2006
 - 426 million mobile phone subscribers in EU (penetration rate 93%)
 - Mobile broadband (3G) taking off: 25 million in 2005
 - Mobile TV fast growth
 - Other wireless applications emerging: bluetooth, WiFi, WiMAX, satellite, radars for cars... → 200 bn € (2% of European GDP)
 - Content and audiovisual sector development: online content market 1.4 bn €
- ICT adoption in all sectors of the economy is key for European productivity
- Contribution of women to the ICT labour market is vital to competitiveness at all levels of industry

- “Gender divide” is already apparent within the ICT sector
 - There is a **perception of technology as a “men” domain** due to pre-existing inequalities and unequal power relations that contributes different access, participation, and treatment for men and women in the ICT sector.
 - Cultural background that tends to create **stereotypes of men and women** predispositions or lack of predispositions for jobs that imply a high level of technological skills.
 - Women ICT uptake is also affected by income, educational attainment, children in the family and age

This is your life:

- in ICT women tend to do different jobs to those of men and not many companies are including women in high technology areas
 - *In the EU women reach <30% of technology and knowledge employments*
 - *In the EU women reach <10% of medium and high technological positions*
- Women have different level of responsibility
 - *In EU only 1 in 4 ICT women either have senior positions or have set up an ICT related business.*
- Increasing women's workload within the family is leaving women with less time for new skills learning and the possibility of knowledge update
- Women are less likely to be able to afford the costs of accessing and investing in ICT
- Women tend to be concentrated in low paid work
- Women still earn less than men in ICT
 - *Women IT managers earn about 87% of men salary in US*
 - *Women IT staff earn about 91% of men salary in US*

...We need not only more jobs, but better jobs ... While ensuring both women and men can balance work and private life.

PWI Newsletter, March 2006

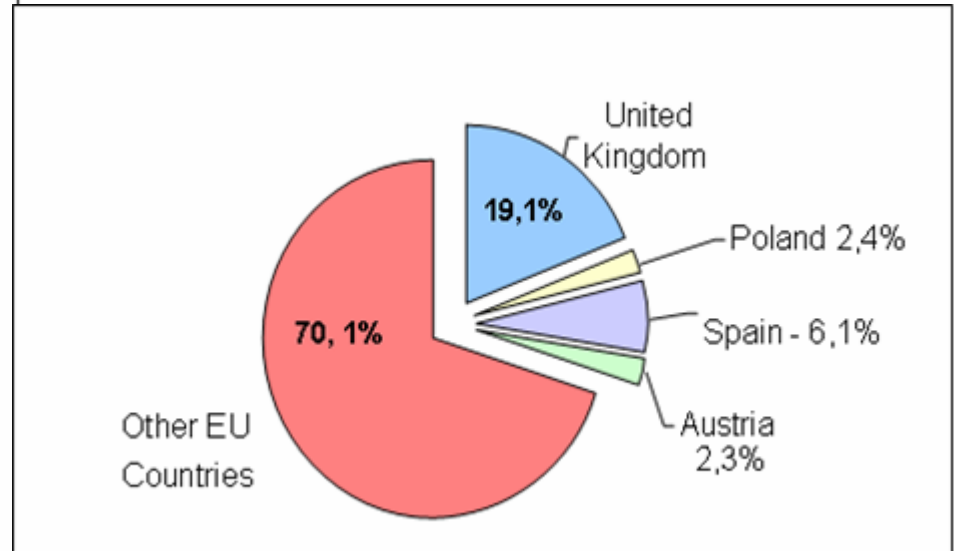
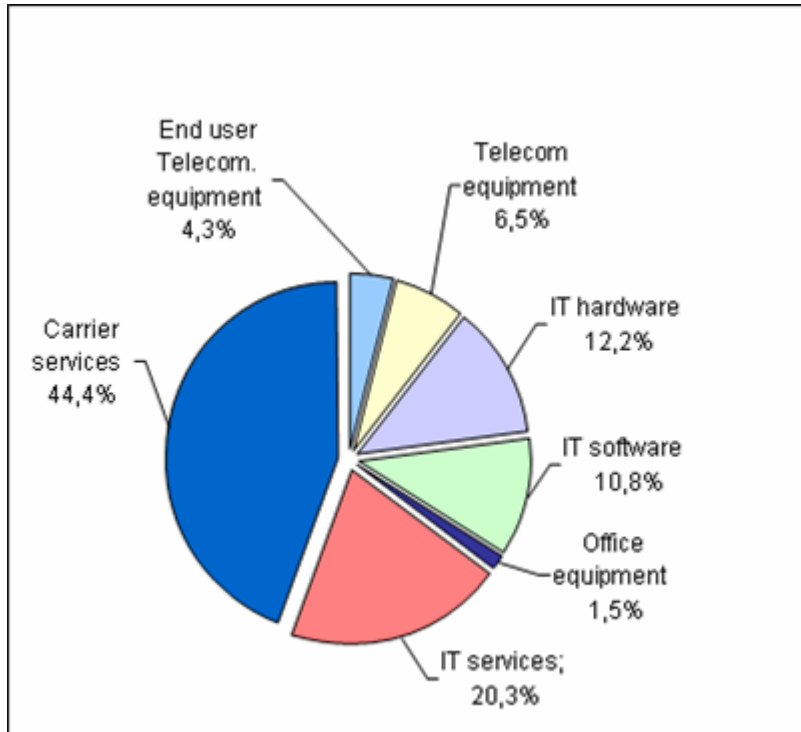
I have yet to hear a man ask for advice on how to combine marriage and a career

Gloria Steinem



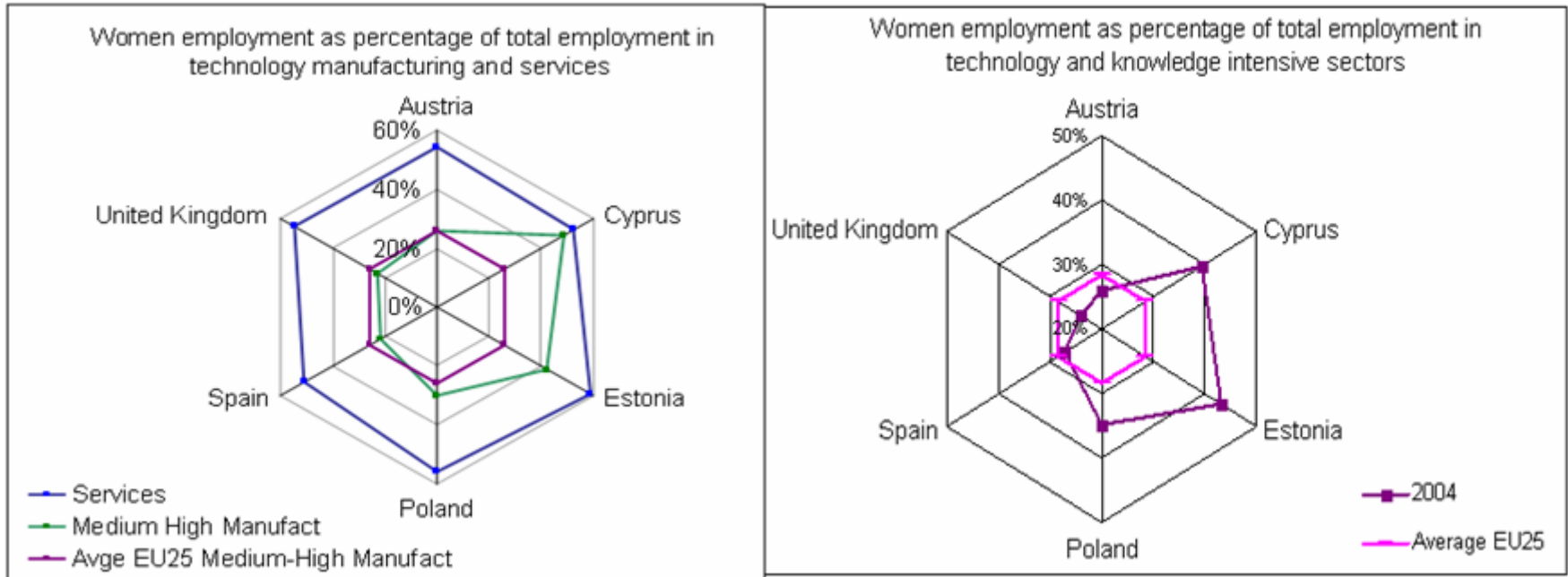
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Source: EITO

- largest market shares: carrier and IT services, with a market value of 400 € billion
- UK highest market share (117 € billion)

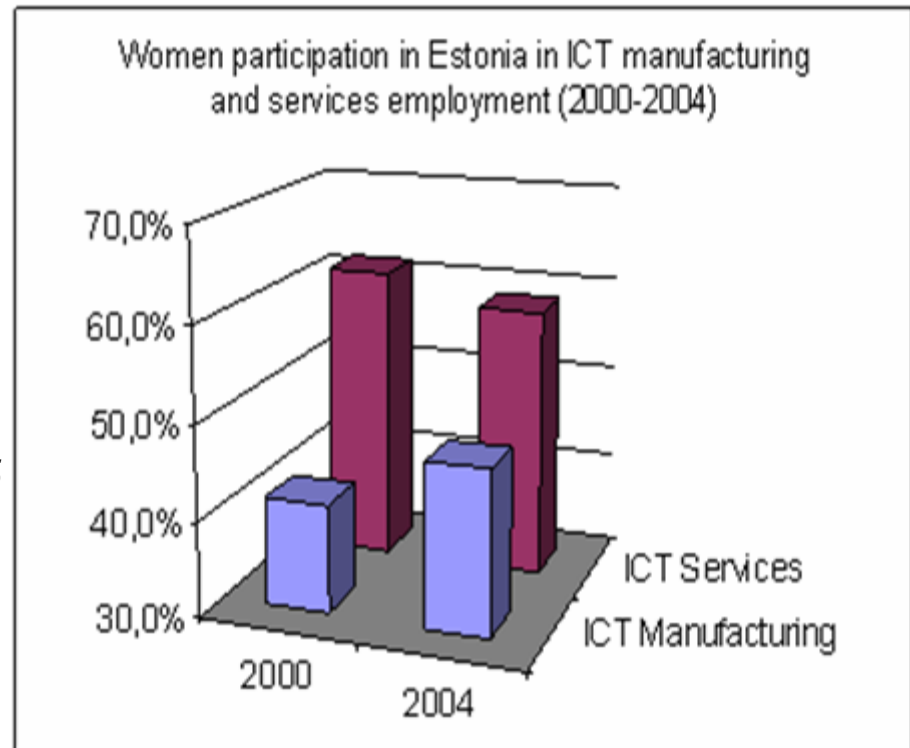


Source: Eurostat

- Women tend to be much less present in the ICT market than men
- Women widely participate in technology services employment
- Poorly represented in highly technological positions (10% in EU) only Cyprus 50%
- *Poorly represented in technology and knowledge sectors (<30% in EU), Estonia and Cyprus 25%-45%*
- Employment in services ↑ +1.9% (1999 -2004) & KIS sub-sector ↑ faster (2.6%)

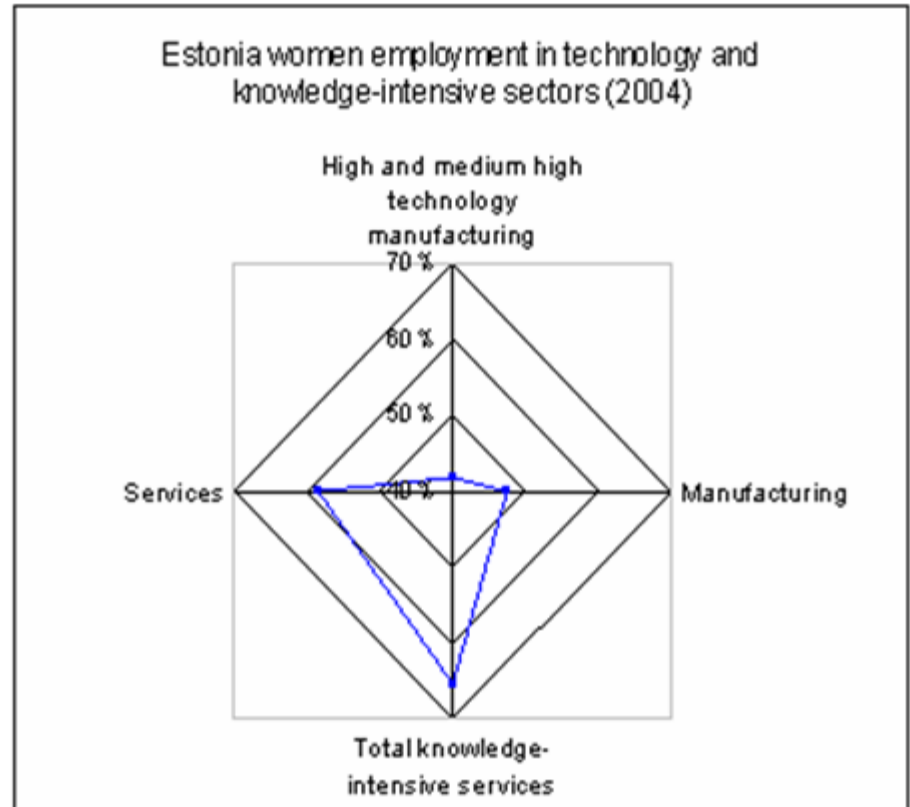
Estonia ICT Employment & gender gap

- ICT employed + 10.000 people in 2004
- 20% annual growth ICT market
- Estonian companies in electronics have currently shortage of ICT specialists
- Annual need for ICT specialists: 600 new people
- Employment in 'Knowledge Intensive Services' (KIS) sector growth 3.9% (EU25 -0.17%)
- Women had highest share in ICT services employment, but the participation in ICT manufacturing grew much faster than in ICT services



Estonia ICT Employment & gender gap

- *Women participation in ICT studies and workplace is very high if compared with EU25 average.*
- *Estonia women employment in technology and knowledge is 43% (EU25 30%)*
- *Estonian women mainly have or get jobs in the knowledge intensive services sub-sector (almost 70%)*



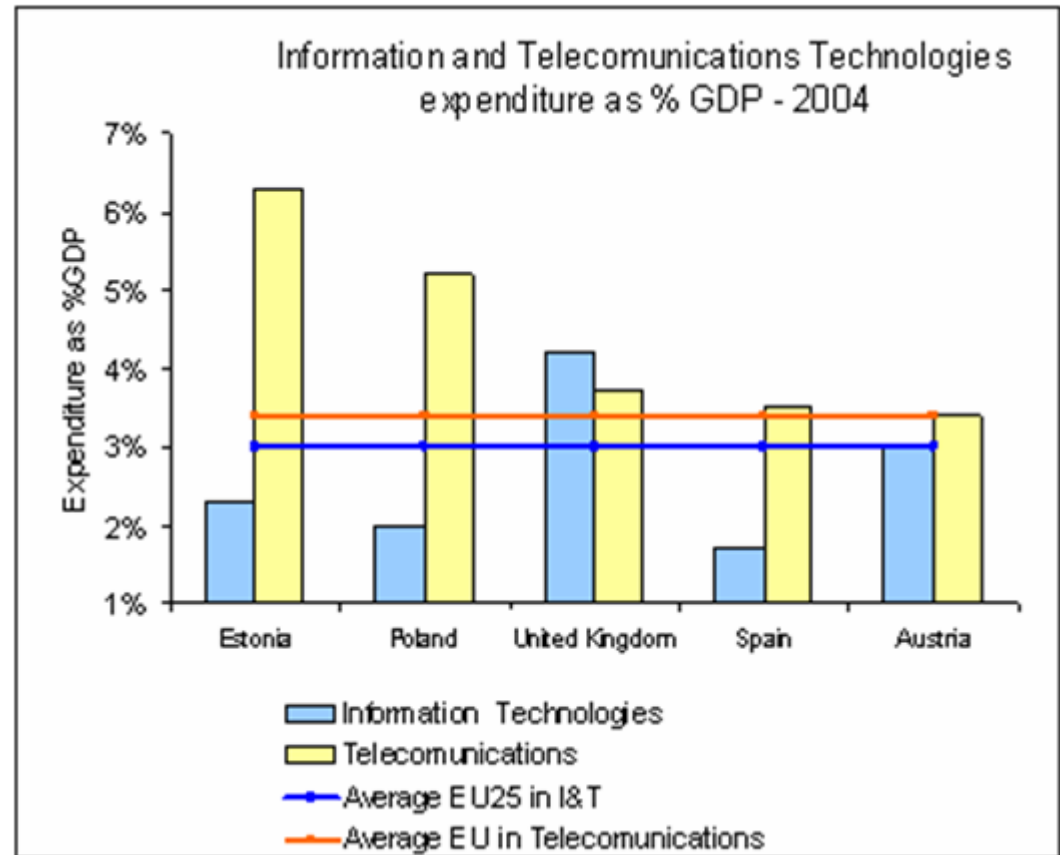
-Telecommunications

expenditure share is nearly 55% of ICT industry

- Estonia: +6% GDP in telecomm

- **IT** expenditure: only UK and Austria reach the EU average

- Spain is the country with lowest IT expenditure

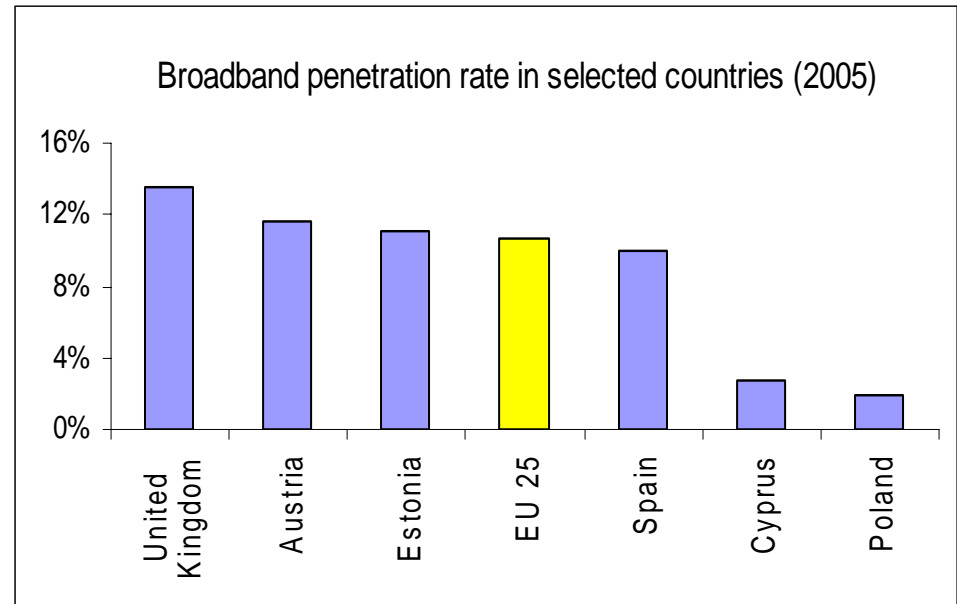


Source: Eurostat

- Telecommunications are foreseen to strengthen the ICT as the potential of high-speed broadband, WiFi, IP voice and video is exploited.
- **Highest broadband penetration rate in UK, Austria and Estonia.**
- Poland is the country with lowest penetration rate although it had a 280% growth during 2005.

Estonia is becoming one of the e-ready societies in the world

- among the top 20 countries worldwide for network infrastructure and provision of access to the general population



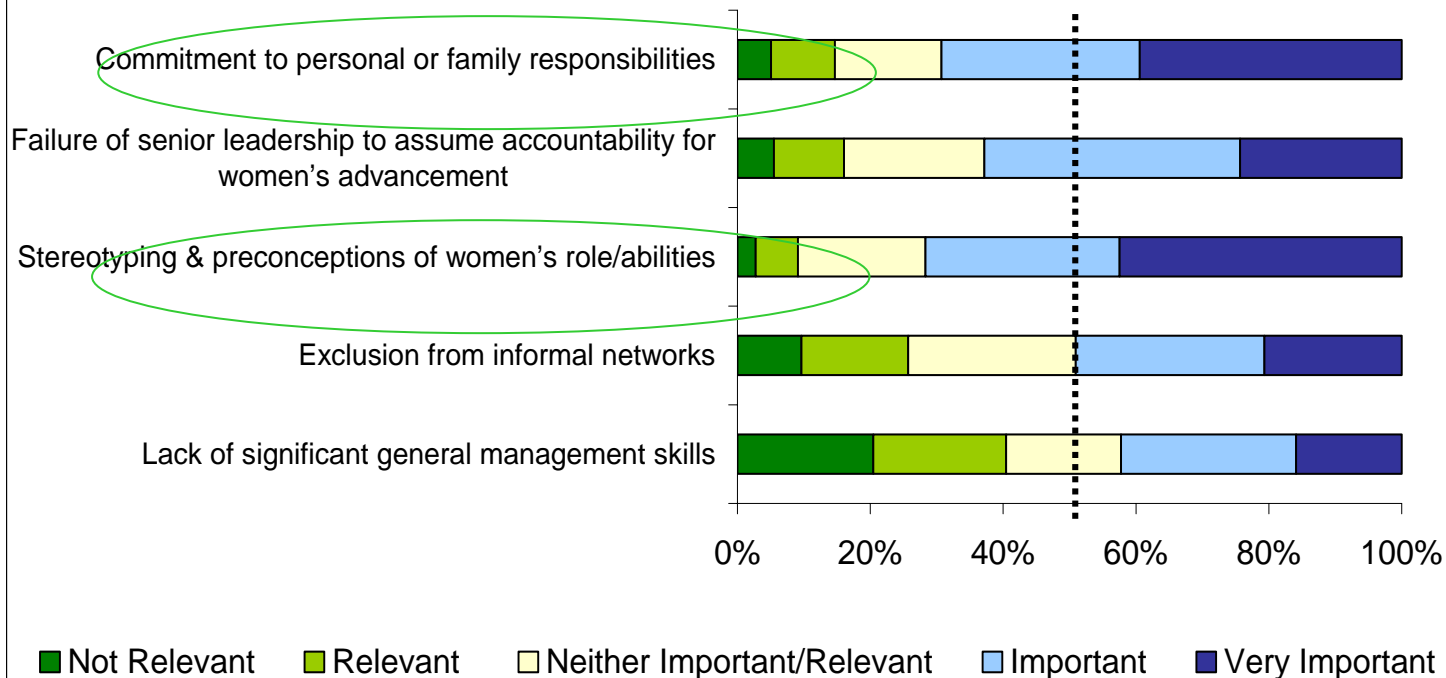
- Why not use women existing skills to do something more flexible?
 - *ICT skills give the flexibility to keep one foot in a career, at least part-time.*
 - *Equality of opportunities between women and men can be enhanced by the potential of ICTs to improve the balance between family and working life*
 - *ICT have enormous potential as a tool to enhance women's economic, political, and social empowerment*

- **Women In Technology can Work Part Time or build a part-time business**
 - *Working part-time doesn't necessarily mean working only 20 hours or less per week.*
 - *"Part-time" can mean many things. For some, it means working only a few hours per day, or one or two days each week. Some professionals work on a project for an extended time (two or three months), and then have several months off.*
 - *Part-time helps building up your business and **having flexibility in your life.***
- What are **some part-time options** for professional women who want a home-based flexible career in ICT?
 - ***e-work** → flexible working scheme (flexible hours, flexible work space etc.) is in line with the labour market development: due to high employment costs, employers tend towards service contracts instead of permanent employment*
 - *Women in a technical field (computer programming or training, software engineering, or telecommunications) have an advantage when going out on their own.*
 - *because **they can obtain technical certifications** which increase both marketability and credibility*

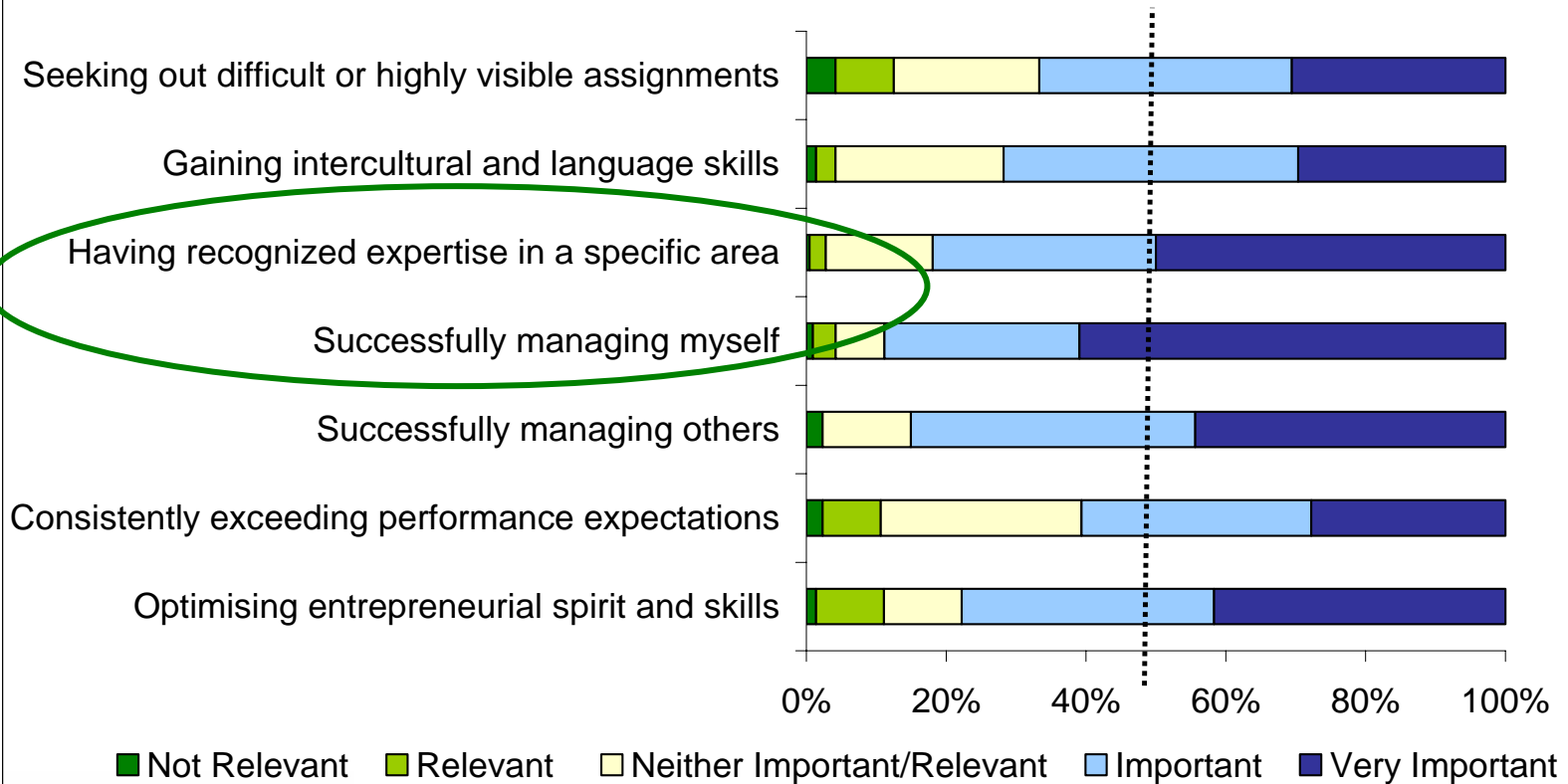
- Certifications (also called "designations") are offered through various industries, organizations, or software or other high-tech manufacturers.
- These "seals of approval" are awarded to qualified professionals in various fields.
- Certifications can be used for teaching (software, computer, or other technical issues) or consulting, and there is demand for individuals who can provide those services.
- Companies tend to hire certified professionals qualified to do the work.
- **WISE findings**
 - ***Certifications and LifeLong Learning perceived as key channels to cope with digital and gender divide and as a global industry standard***
 - ***Certification Programmes help women in ICT penetration***
- Examples of certified professionals in ICT → career options
 - *Microsoft Certified Trainer (MCT), authorized to teach Microsoft software*
 - *Novell, SAP, Oracle*
 - *Career Space initiative*
 - *Microsoft Representative Office + UNDP funding targeting up-skilling of women in ICT*
 - *Cisco Networking Academy Program (Cisco Certified Networking Associate*



How important are the following factors (barriers) to hold women back?



How important are the following success factors for women to get ahead?



Ranking	Women	Men
1	Supporting	Decision making
2	Problem-Solving	Influencing Upward
3	Team-Building	Problem-Solving
4	Decision making	Communicating at International level
5	Rewarding	Delegating
6	Communicating at International level	Team-Building
7	Inspiring	Mentoring
8	Networking	Consulting
9	Consulting	Networking
10	Delegating	Inspiring
11	Mentoring	Rewarding
12	Influencing Upward	Supporting

Why ICT women still earn less?

- Women choose to work fewer hours or put career-advancement plans on hold while balancing family commitments
 - “Some women in IT are faced with difficult personal choices, especially when they're juggling families while trying to advance up the career ladder”
 - “Climbing up the food chain in IT means spending time in an operational environment, for instance in project management, which can be very time-consuming and disruptive to normal work patterns”
 - “Time-consuming” and “disruptive” can mean being on-call 24x7, including nights and weekends, which can be chaotic when you've got kids”
-Carol Pride, CIO at Pinnacle Entertainment-
- Women fail to aggressively negotiate pay due to “deep-rooted” societal and psychological issues:
 - “women are trained from an early age that they shouldn't talk about money. It's not polite“. *“I want to help women realize that acquiring wealth is not bad and understand how much their contributions [to the workplace] mean”. **Wealth is power.**”* - Carolyn Leighton, CEO, WITI-
 - *“I've always been paid quite fairly, but it was a surprise when I learned I could negotiate,”* -Carol Pride, CIO at Pinnacle Entertainment-
- Outright employer discrimination



Why the lack of women in executive positions?

- Some women choose not to seek executive positions because of other decision they make to care for the children or the elderly
- **Steps** women can take to improve their prospects to success
 - Women tend to be more focused on getting the job done → **To promote themselves** and make people in the company and outside of it aware of their expertise and strengths
 - There is a tendency to choose people they know and women need to be visible and interact
 - Increasing the number of women in ICT overall would help improve the visibility of women in upper management → **Consider ICT as a career and achieve leadership roles in the field**

- **Developing Personal Networks** helps women connect with people and build her career
- Make the best use of networking
 - *What is my personal network?*
 - *How do I use it?*
 - *How can I grow my network?*
 - *How can I leverage my current connections?*
- A way to socialize, to do business with and to do business for
 - **PWI** Professional Women International, Belgium www.pwi.be
 - **EuropeanPWN** European Professional Women's Network
<http://www.europeanpwn.net>
 - **WITI** Women in Technology International, California
<http://www.witi.com>
 - **WISE** www.ubique.org/wise



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Thank you!



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