

Your Voice Our Future.

Baseline Report
2025



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Your Voice Our Future

The mobile industry is constantly evolving, driven by the commitment and talent of its people. To understand where the industry stands, it is essential to capture the perspectives of those working within it.

The GSMA Voice Campaign provides employees across the mobile ecosystem with an opportunity to share their experiences. Using inclusio's confidential data capture, the campaign generates detailed insights on key demographic factors such as gender, nationality, neurodiversity, disability and socioeconomic background, alongside how people experience culture.

Key areas measured include trust, wellbeing, leadership, career progression and inclusion all of which are critical to retention and long-term industry performance.

For the first time, the GSMA Voice Campaign offers a robust, evidence based view of the mobile workforce, providing organisations with actionable data to track culture performance and make informed decisions that reflect the diverse needs of their employees.

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Change the Face Alliance

Introduction

#ChangeTheFace is an industry wide Alliance calling for action to increase diversity and equality in the mobile tech sector. The campaign was launched in March 2020 and has since built a community of individuals and organisations advocating for positive change within the industry.

Since its inception, the #ChangeTheFace Alliance has united global technology companies, consultancy firms, NGOs, and industry bodies to collaborate on common Campaigns, share insights through an open-source portal and drive collective progress on diversity and inclusion. Now a part of the GSMA portfolio, the work includes advancing inclusion across the mobile ecosystem and aims to create a stronger global platform for collaboration, scale, and lasting industry impact.

The data in this report has been produced in partnership with inclusio and will serve to inform the future strategic work of the Alliance.

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Voice Campaign Timeline

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**March 2025 Launch
MWC Barcelona**
Official launch of the
GSMA Voice Campaign
at MWC25 Barcelona.

**April to December 2025
Industry Wide Participation**
Data collection completed in
December, establishing
2025 as the baseline year.

**November 2025
Webinar LinkedIn Live**
The Power of Data, The
Power of People.
Lara Dewar, John
Amaechi, Sandra Healy,
Serpil Timuray.

**March 2026 Publication
MWC Barcelona**
First GSMA Voice baseline
Report published, setting
the foundation for future
tracking.

Executive Overview

The mobile industry operates at global scale, connecting more than five billion people and underpinning economic and social activity worldwide. As the industry continues to evolve, its long term strength will depend not only on technology and infrastructure, but on the people who design, build and operate it.

The GSMA Voice Campaign reflects a shared recognition across the industry that culture and workforce experience are no longer peripheral considerations. They are material to performance, resilience and sustainability. Understanding how people experience leadership, progression, fairness and inclusion is essential if the industry is to retain critical skills, develop future leaders and continue to innovate at pace.

This report presents the first industry wide baseline of people and culture data from across the mobile ecosystem. It brings together employee insight from GSMA member organisations and mobile network operators to establish a clear baseline of where the industry stands today. Importantly, it provides a consistent, evidence-based view that can be tracked over time.

What this baseline offers is visibility. It allows leaders to see where confidence in progression weakens, where trust in leadership is lowest, and where experiences of culture differ across groups. It highlights where risk concentrates and where targeted attention is required. These insights are particularly important in an industry

facing rapid technological change, regulatory complexity and increasing competition for talent.

The GSMA's role is to convene, support and enable collective action across the sector. Through Campaigns such as the GSMA Voice, we can move beyond isolated efforts and towards a shared understanding of industry wide challenges and opportunities. This is not about comparison for its own sake, but about creating the conditions for informed leadership decisions and sustained progress.

This baseline marks the beginning of that journey. As participation grows and data is tracked year on year, it will strengthen the industry's ability to measure progress, demonstrate accountability and build a culture that supports long-term success.



Lara Dewar

Chief Marketing Officer,
GSMA

Executive Overview

This report provides the first industry-wide baseline of people and culture data across the mobile sector.

It draws on responses from nearly 1,000 employees, primarily within the GSMA member organisations and mobile network operators, spanning geographies, career stages, leadership levels and demographic groups. It establishes a clear view of employee experience across culture, progression, leadership, fairness, wellbeing and retention.

The GSMA Voice Campaign is grounded in a simple principle: sustainable culture change must be evidence based, informed by employee voice and owned collectively by the sector. Industry participation reflects recognition that culture is a material driver of performance, risk management and long-term resilience.

The data reveals consistent structural patterns. Intent to leave peaks at the three-to-five-year career stage, when future leaders should be retained. At this point trust declines and confidence in progression drops, particularly for women. Perceptions of fairness and transparency in progression are strongly linked to retention. While pay is relevant, lack of visible progression is a stronger driver of exit risk. Experiences of marginalisation correlate with weaker culture performance, lower trust and wellbeing and higher attrition risk.

This is not a scorecard. It is a baseline that enables the industry to track culture performance over time, compare experiences across groups and focus leadership attention where risk is highest. The GSMA Voice Campaign provides a shared evidence base to support accountability at leadership and board level. Sustained sector performance depends on fully leveraging the capability of its people. The campaign equips the industry with the data and tools required to drive measurable progress.



Sandra Healy

CEO and Founder
inclusio

Establishing the 2025 Baseline

Participation and Demographic Context

In 2025, nearly 1,000 employees contributed to the first industry wide baseline of people and culture experience across the mobile sector, captured through inclusio's behavioural science platform.

The dataset is reflective of employees the core of the industry. The majority of participants work within GSMA member organisations, with more than 70% employed by mobile network operators.

The sample represents a highly experienced workforce. Almost 60% have more than ten years' sector tenure and 45% hold senior leadership roles, providing direct exposure to organisational decision making and leadership practice.

Demographic disclosure reached 93%, enabling robust analysis across age, gender, nationality, education pathways and culture experience. Responses span five generations and more than 100 nationalities, reflecting the global profile of the sector.

This establishes 2025 as the baseline year for the GSMA Voice Campaign, creating a foundation for year-on-year tracking, group comparison and identification of emerging culture-related risk and opportunity.

1,000
Baseline Voices



70% Mobile network operators



93% Demographic disclosure



45% Senior leadership



80% GSMA Members



100+ Nationalities



5 Generations

Industry Demographics

Understanding culture performance requires an understanding of who makes up the mobile workforce. The 2025 GSMA Voice Baseline captures a diverse, global and highly experienced population, providing critical context for how culture is experienced across the industry.

The workforce represented in this baseline is predominantly male, with men accounting for approximately two-thirds of respondents and women representing one-third.

Participation spans all career stages, with a strong concentration in mid-to-late career roles. Generation X forms the largest cohort, followed by Millennials, reflecting a workforce with deep sector experience alongside a substantial pipeline of future leaders.

The dataset reflects the global nature of the mobile industry. Participants represent more than 100 nationalities, with nearly one in five identifying as an immigrant. More than a third are the first generation in their family to attend university, highlighting the sector's role in supporting social mobility and diverse educational pathways.

Employees' lives outside work are also a defining feature of the workforce. Nearly half of respondents have children and a significant proportion report additional caring responsibilities beyond childcare. These factors shape how people experience work, wellbeing, and balance across different career stages.

Neurodiversity and disability are present across the workforce, with more than one in ten respondents identifying as neurodivergent and a

smaller proportion identifying as having a disability.

High demographic disclosure rates across the dataset provide confidence in the robustness of analysis by group and enable meaningful examination of how culture performance varies across different lived experiences.

Together, these demographics describe a workforce that is global, experienced and carrying significant professional and personal responsibilities. This context is critical to interpreting the culture results that follow and to understanding where culture-related risks and opportunities are most likely to emerge.

Executive Takeaway

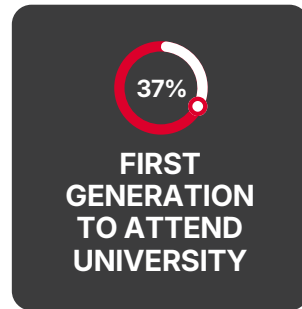
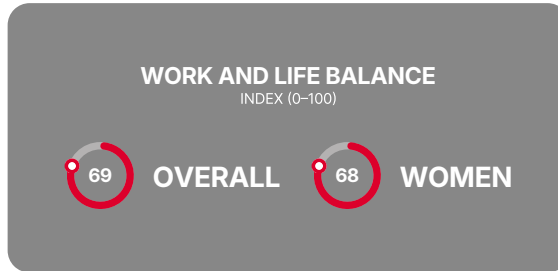
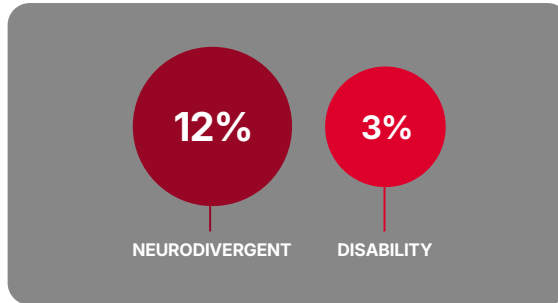
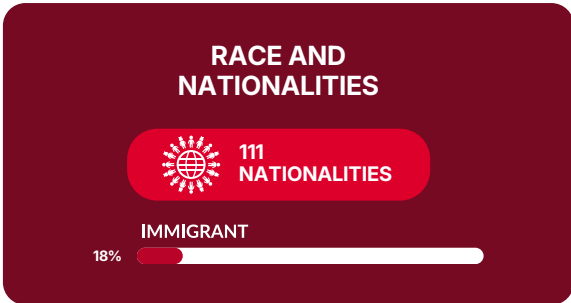
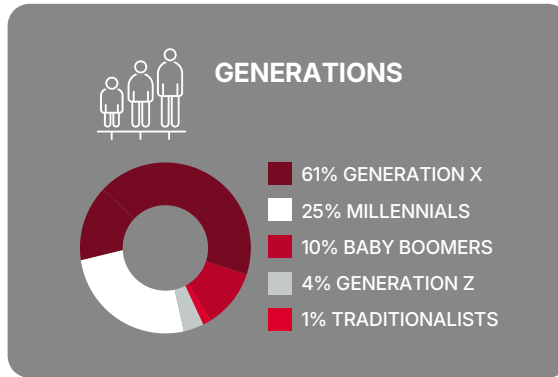
This data paints a picture of a diverse, experienced workforce with varied personal and professional dynamics that shape how culture is experienced across the mobile industry. Recognising these factors is essential when looking at culture performance and identifying where targeted interventions can lead to meaningful improvements.

As we turn to the culture performance metrics, it's important to view them through this demographic lens. With insights into gender, generation, nationality and family responsibilities, we can now examine how the mobile workforce experiences core cultural dimensions such as psychological safety, trust in leadership and wellbeing. These findings help illuminate the gaps in culture that disproportionately impact key groups and highlight areas of opportunity for sustained improvement.

Industry Demographics

PEOPLE

CULTURE



1,000 VOICES

The Culture Baseline 2025

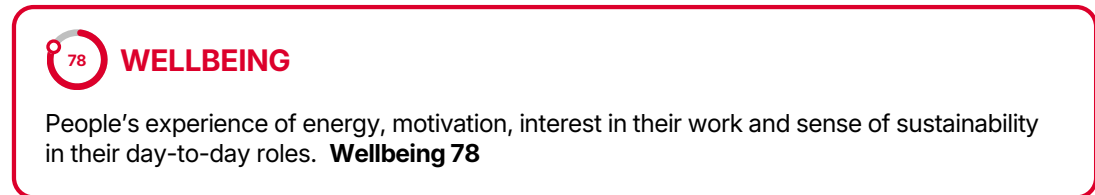
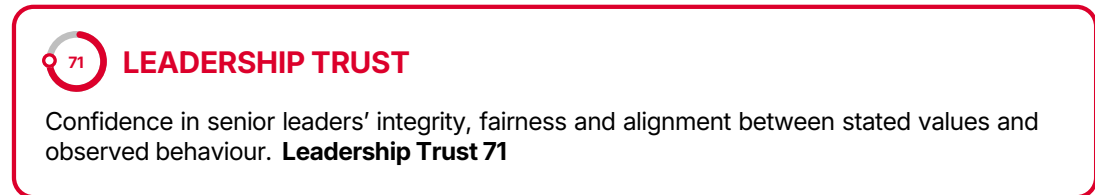
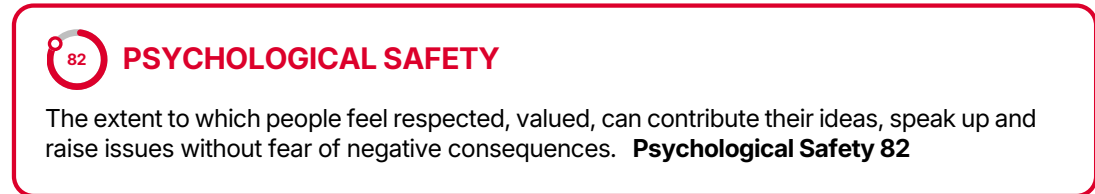
In this baseline, culture is measured as people’s experience of working in the mobile industry. It reflects how leadership behaviour, organisational practices and everyday decision making shape trust, psychological safety and wellbeing at work.

The GSMA Voice baseline is underpinned by inclusio’s scientific Culture Performance Model, developed over eight years of academic research and applied consistently across sectors. The model translates employee experience into measurable indicators that can be tracked over time and linked directly to organisational outcomes.

Rather than capturing opinion or engagement alone, the framework focuses on the cultural conditions most closely associated with retention, leadership behaviour, psychological safety and sustained performance.

The 2025 GSMA Voice Baseline captures overall culture performance alongside three core culture dimensions. These dimensions were selected because of their direct relationship to retention, progression and leadership behaviours across the workforce.

Each indicator is assessed using standardised measures, enabling comparison across demographic groups and career stages, and providing a consistent reference point for year on year tracking.



Low 0 - 39 Medium 40 - 69 High 70+

Gender and Culture Experience

The 2025 baseline shows a consistent gender gap in culture experience across the mobile industry.

Overall culture performance for women is 75 out of 100, compared with 79 for men. While the gap is modest, it is persistent across all measured dimensions and widens at key career stages.

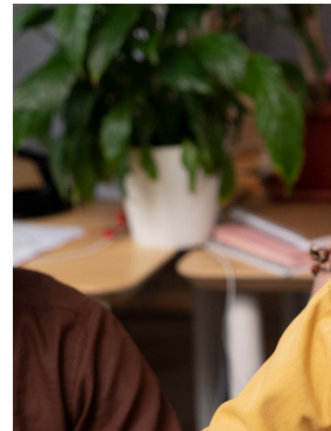
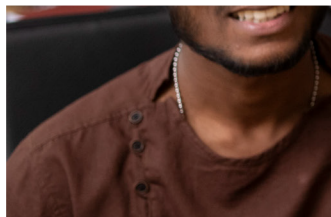
The largest difference is in leadership trust, where women score 70 compared with 74 for men, reflecting lower confidence in fairness, consistency and follow-through by senior leaders. Gaps are also evident in wellbeing (75 for women vs 78 for men) and psychological safety (81 vs 83).

Gender differences become most pronounced at the three to five year career stage, where women report lower trust, weaker confidence in progression and a higher intent to leave. This coincides with a critical point in the leadership pipeline.

Experiences of marginalisation are more common among women and are strongly associated with lower trust, weaker wellbeing and higher exit risk. These patterns are consistent across organisations and indicate structural issues in how progression, fairness and leadership decisions are experienced in practice.

Closing the gender gap in culture performance requires sustained leadership focus on trust, transparency and progression rather than isolated interventions. Where these conditions are present, culture performance strengthens for all employees and retention risk reduces.

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People and Culture Insights

Bringing the Data Together

The 2025 GSMA Voice Baseline captures a globally diverse, experienced workforce, with strong representation from senior leaders, five generations and employees with more than ten years' tenure in the mobile industry. This provides a robust basis for understanding how culture is experienced across career stages and demographic groups.

Overall culture performance for the industry is 75 out of 100. Psychological safety is relatively strong (82), wellbeing is moderate (78), and trust in leadership is the weakest dimension (71). This pattern is consistent across the industry.

Demographic analysis shows that culture experience is not uniform. Women score lower than men across all three dimensions, with the largest gaps in leadership trust and wellbeing. These differences are not marginal and increase at specific points in the career lifecycle.

The most pronounced concentration of risk occurs at the three to five year tenure stage. At this point, intent to leave rises sharply, trust in leadership reaches its lowest level and confidence in progression declines. Women are disproportionately affected. Experiences of marginalisation are also higher at this stage and are strongly associated with lower trust, weaker wellbeing and higher exit risk.

Taken together, the data shows that attrition risk in the mobile industry is predictable and patterned. It is concentrated at defined career stages, affects specific demographic groups more acutely and is closely linked to leadership trust, progression clarity and inclusion in day-to-day decision making.

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Insight 1: Talent Retention Risk at the 3-5 Year Career Stage

Why this Matters

The three to five year career stage is where organisations should be consolidating capability, developing future leaders and realising return on early talent investment. Instead, this is the point at which retention risk peaks across the mobile industry.

The data shows that at the three-to-five-year tenure point:

- 51% report intention to leave or uncertainty about staying
- Compares with 28% across all other career stages
- Trust in leadership is at its lowest point in the dataset
- Confidence in career progression declines sharply

Gender gaps widen, with women reporting significantly higher exit risk. This is not a short-term engagement issue, it's a structural drop-off at a predictable point in the career lifecycle.

Executive Summary

Retention risk peaks at the three-to-five-year career stage, driven by declining trust in leadership, reduced confidence in progression and widening gender gaps at a critical point in the leadership pipeline.

What this Signals

Marginalisation is not an isolated experience. It is a structural culture signal. Where exclusion persists, attrition risk increases regardless of pay, role or workload.

Drivers of Exit at This Stage

At 3-5 years' tenure employees cite:

- Salary
- Limited progression
- Leadership concerns
- Lack of recognition

Progression and trust in leadership outweigh pay as drivers of exit.

Gender Dimension

Women at this stage report:

- Lower trust
- Weaker progression confidence
- Higher marginalisation
- Higher intent to leave

The leadership pipeline narrows at this point.

Why This is a Leadership Risk

Exit at this transition stage results in loss of:

- Productive talent
- Institutional knowledge
- Future leaders

Pipeline risk created here cannot be fixed later through hiring alone.

Insight 2: Exclusion and Marginalisation as a Predictor of Attrition

Why this Matters

Sustained industry growth depends on retaining and progressing capable talent through the leadership pipeline. The data shows that women are disproportionately exiting the industry due to constrained perceptions of career growth well before reaching senior leadership levels. **The data shows across the workforce:**

- 48% intending to leave or unsure about staying report marginalisation
- Compared with 16% of those intending to stay
- A 32-point gap and the strongest predictor of exit in the dataset
- More than one in four report marginalisation, rising at the three to five year career stage

Women report significantly higher marginalisation and higher exit risk, widening the leadership pipeline gap. Low trust in leadership and psychological are lead indicators.

Executive Summary

Experiences of marginalisation are the strongest predictor of intent to leave in the mobile industry, closely linked to low trust, weaker wellbeing and elevated exit risk across demographic groups.

What this Signals

The data indicates that retention risk at 3–5 years is not random. It is shaped by how progression is managed, how leadership behaviour is experienced and how fairly decisions are communicated. This makes it one of the most actionable risk points in the industry.

Drivers of Exit at This Stage

Marginalised employees are more likely to report:

- Lower trust in leadership
- Lower wellbeing and belonging
- High uncertainty on progression

Marginalisation compounds culture risks and accelerates exit decisions.

Gender Dimension

Women are more likely to report marginalisation:

- At early to mid career stages
- Three to five year tenure point
- Significantly higher exclusion

Low leadership trust results in higher intent to leave.

Why This is a Leadership Risk

Marginalisation undermines culture performance:

- Weakens trust
- Erodes wellbeing
- Increases attrition risk

The highest-impact levers to improve retention and culture performance.

Insight 3: Talent Pipeline Risk and the Gender Career Progression Barrier

Why this Matters

Experiences of exclusion and marginalisation have a direct and material impact on whether people stay in the mobile industry. They are among the strongest indicators of culture breakdown and future attrition risk.

What the data shows among employees who are leaving or unsure about staying:

- 55% of women cite limited career growth or promotion opportunities as their primary reason for considering exit. This compares with 19% of men
- Salary and pay competitiveness show near parity between women and men
- Leadership concerns do not disproportionately drive women's exit decisions

The results indicate a progression-related retention risk that is distinct from pay or leadership quality.

Executive Summary

Women are exiting the industry primarily due to constrained perceptions of career growth, creating a predictable and early pipeline risk that is not explained by pay or leadership quality.

What this Signals

The gender progression gap is not driven by pay or performance. It reflects constrained visibility of opportunity, unclear pathways and inconsistent application of progression decisions. Addressing this risk requires sustained leadership attention to transparency, fairness and progression clarity.

Drivers of Exit at This Stage

For women considering leaving, the most cited reasons are:

- Limited career growth or promotion opportunities
- Salary and pay competitiveness
- Lack of recognition, appreciation

Career growth is the dominant driver, exceeding all other factors.

Gender Dimension

The progression gap emerges early:

- The first one-to-ten years
- Widens through mid career Lower progression confidence
- Lower wellbeing

Reduced positivity contributes to higher attrition risk.

Why This is a Leadership Risk

When women exit due to perceived lack of progression, organisations lose:

- Experienced, high-potential talent
 - Narrows the leadership pipeline
 - Limits future capability
 - Risk cannot be resolved through hiring
- Opportunity, promotion and progression need to be experienced in practice.**

Reflections

Establishing the 2025 Baseline

The 2025 GSMA Voice baseline establishes the first shared, industry-wide view of culture performance across the mobile ecosystem. It provides a baseline from which progress can now be tracked consistently and transparently over time.

The findings highlight areas of strength, alongside signals of risk. While psychological safety is relatively strong, trust in leadership and confidence in progression remain uneven, shaping retention and pipeline outcomes at critical career stages. These patterns are consistent across the dataset and point to where collective attention is most needed.

Importantly, this baseline is not intended as a judgement on individual organisations. It serves as a common reference point for the industry, enabling more informed dialogue, clearer baseline and a stronger evidence base for decision-making.

In 2026, the GSMA Voice Campaign will continue, allowing us to build a robust dataset. This continued tracking will allow for a year-on-year tracking of culture performance, enabling the industry to monitor change, assess progress and leverage the learnings as the sector continues to evolve.

As the mobile industry adapts to rapid technological and societal change, sustaining performance will depend on how effectively it develops, retains and supports its people. The GSMA Voice baseline provides the foundation for that work.

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GSMA Closing Perspective

As the global association of mobile and mobile ecosystem organisations, GSMA plays a convening role in bringing the sector together around shared challenges and long term priorities. The GSMA Voice baseline, delivered in partnership with inclusio, provides a shared, evidence based foundation for understanding culture performance across the industry.

Through this collaboration, the GSMA and inclusio have established a consistent baseline that enables transparent baseline, year on year tracking and more informed leadership dialogue.

As the sector continues to evolve at pace, retaining talent, building trust in leadership and strengthening the future pipeline will be critical to long-term resilience and growth.

The GSMA Voice Campaign will continue to support this ambition by providing robust data and insight to inform decision-making and track progress across the mobile ecosystem.

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8 DECENT WORK AND ECONOMIC GROWTH



Aligning with the UN Sustainable Development Goals (SDGs)

The **GSMA Voice Campaign** not only provides critical insights into the mobile industry's culture, it also aligns directly with the United Nations Sustainable Development Goals (SDGs), particularly:

Goal 8: Decent Work and Economic Growth

The benchmark data helps drive inclusive economic growth by promoting decent work and job security, ensuring equitable workplace experiences, and addressing gaps in career progression, especially for underrepresented groups.

Goal 10: Reduced Inequalities

By capturing and acting on diverse voices from across the mobile industry, the GSMA Voice Campaign aims to reduce inequalities within and among countries, creating a fairer, more inclusive environment for all employees, irrespective of gender, background, or career stage.

10 REDUCED INEQUALITIES



Have your say

The Case for Action

The industry now has a credible, industry first evidence base that provides visibility of culture performance across the mobile sector. The data identifies specific, measurable risk points where retention, progression and leadership capability are most exposed, alongside proven levers that are closely linked to business outcomes. It is the start of an important and informed conversation about the imperative of talent moving forward.

Leadership Commitment

When culture is managed with the same rigour as other performance drivers, organisations strengthen retention, build more resilient leadership pipelines and reduce long term people risk.

At an industry level, this creates a mobile industry that is better equipped to perform, adapt and reflect the societies and customers it serves.



“We at Deloitte are very excited to see the GSMA Voice Campaign finally coming alive with the inaugural report at this year’s MWC. We are confident that this will become a people and culture baseline for our whole industry, helping to galvanise members around this effort and multiply its impact.”

— **Dr. Tim Bottke**

Partner | Global Telecommunications
Media and Entertainment Leader
Member of the Global TMT Executive





"The #ChangeTheFace Alliance was created to bring organisations across our industry together around a shared goal: to better understand the barriers that exist and to take collective action towards a more inclusive and representative sector. From the outset, our work has been guided by data and insight. The GSMA Voice Campaign marks an important next step on that journey, establishing the first global baseline on representation and lived experience across the mobile ecosystem. By building this shared understanding, it provides a foundation to listen, learn and act, so we can create an industry that truly reflects the diverse customers and communities we serve."

— **Serpil Timuray**

Founding Chair

#ChangeTheFace Alliance



Report Publication

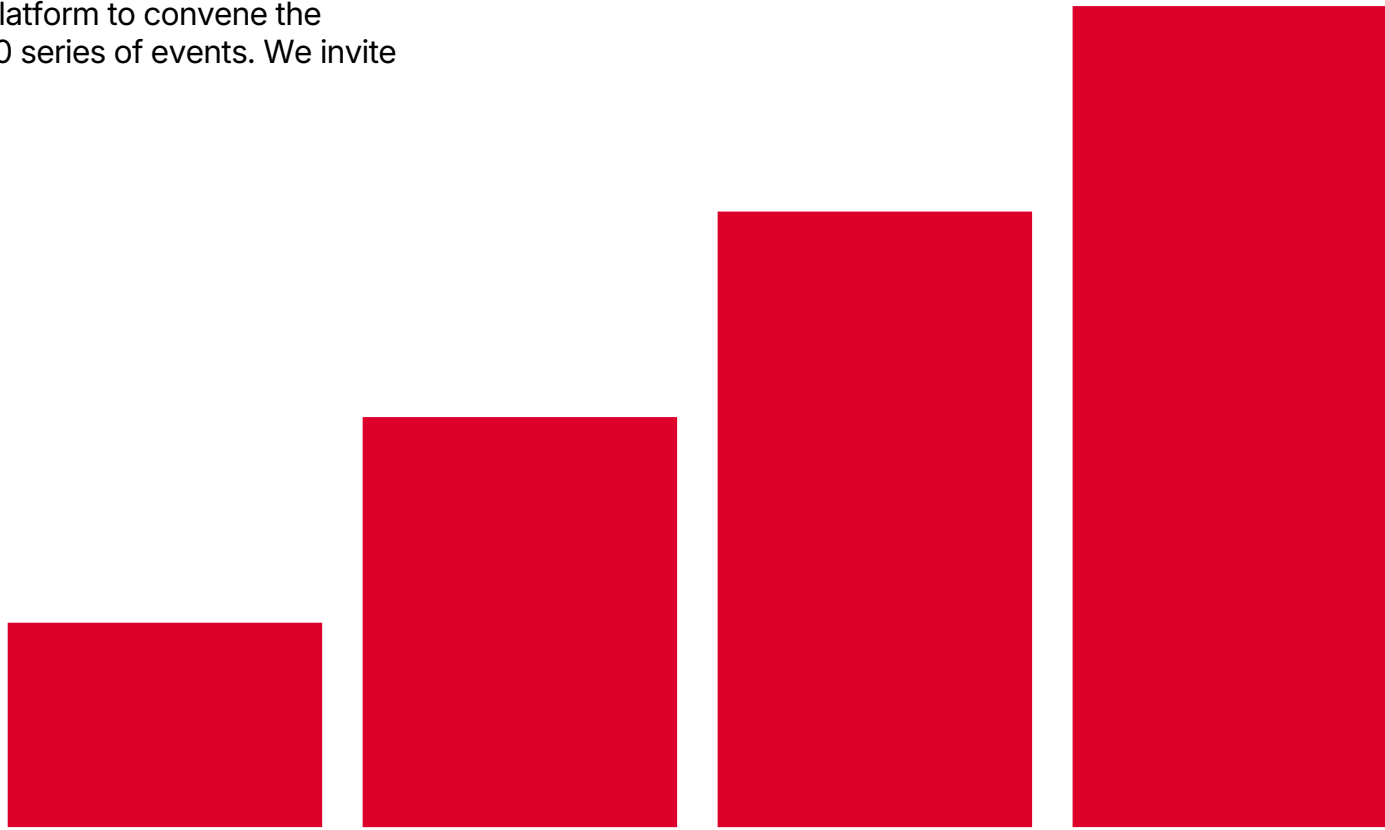
The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry, and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions, and Outreach. This activity includes advancing policy, tackling today’s biggest societal challenges, underpinning the technology and interoperability that make mobile work, and providing the world’s largest platform to convene the mobile ecosystem at the MWC and M360 series of events. We invite you to find out more at [gsma.com](https://www.gsma.com)

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www.gsma.com/the-voice-campaign/



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About inclusio

inclusio is a people intelligence platform that helps organisations strengthen performance by turning workforce data into clear, actionable insight. Using rigorous scientific research, inclusio shows where culture supports or undermines outcomes that matter to leaders, including retention, trust, Manager effectiveness, psychological safety and wellbeing.

The platform is built to drive participation and signal credibility, consistently delivering response rates above 80 percent. This depth of engagement allows organisations to see an accurate picture of everyday employee experience, pinpoint material cultural risks, prioritise improvement areas and evidence progress with confidence over time.

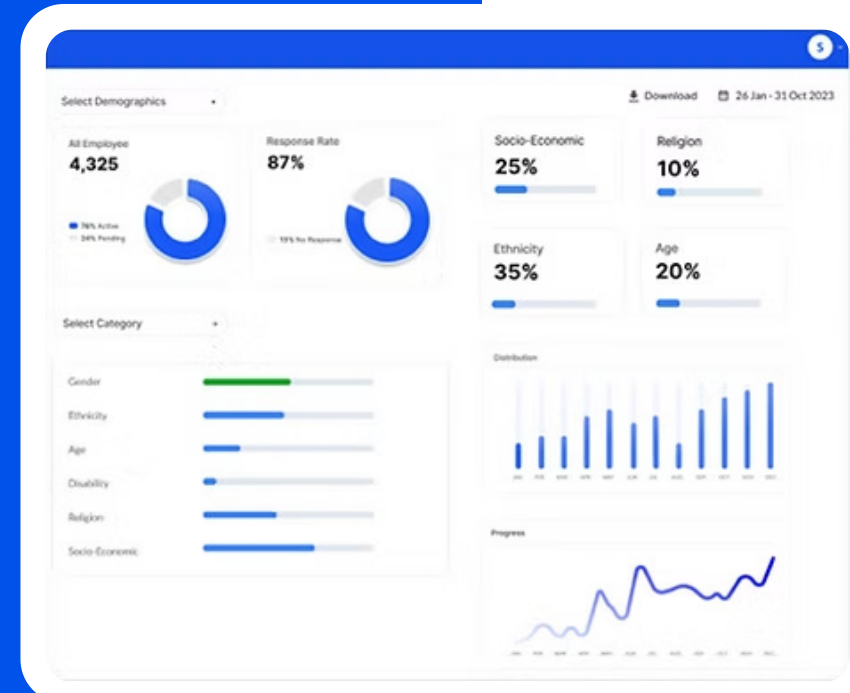
inclusio's framework draws on more than eight years of academic research and enables consistent comparison across demographic groups, career stages and leadership levels. Anonymous and confidential participation protects employee voice, while leaders receive robust, decision-ready insight to manage culture as a measurable performance and risk discipline capability.

As the methodology partner for the GSMA Voice Campaign, inclusio has provided the measurement framework, analytical capability and delivery support required to establish a consistent, industry-wide baseline of culture performance across the mobile sector.



Contact Us

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