



ALLY UP

Europe



Todd Sears

with Jane Barry-Moran



HSBC

 LEADERSHIP

Our initial global findings from over 5,000 respondents in 11 countries lead us to understand that individual and corporate Allyship must be a verb. This is clear as we bring the focus to Europe and the reality for Allyship to the LGBTQ+ community.

We want to thank our sponsor FCB and all 82 of our member firms. We cannot do this work without your support. The first piece of the AllyUP series was a look at the trends and a deep dive on the reality in the United States. As we turn to Europe it is important to note that the data collected represents 13 Countries around the world. The data shared about Europe comes from 4 countries: UK, Italy, France and Germany.

Dear Leaders,

I'm proud to share this LGBTQ+ ally research, which is groundbreaking in both scope and objective.

AllyUp reveals the landscape of corporate ally-ship today. Most importantly, however, it maps how organizations can build alliance and inclusion at every level of engagement: among coworkers; across the enterprise; and throughout the larger community. In this first-of-its kind piece, we've endeavored to show not only best practice for companies in valuing their talent, but also how that practice makes the most business sense for the bottom line. When ally-ship starts at the top—when leaders visibly support and advocate for LGBTQ+ equality in a consistent, collaborative, compounding way—"ally" becomes a verb: something everybody does, reflexively, and proudly.

Historically, allyship is a word that is used to understand the ways that non-marginalized communities stand up for and support the needs and voices of those that are at the margins. This could not be more important and relevant today. What we found in this research is true across all of the conversations around racism, nationalism, xenophobia and more: Allyship is authentic when it is centered on education, action and amplifying the needs and voices of the community it is aimed to support.

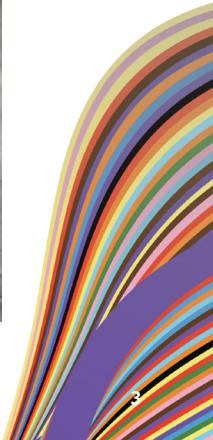
We could not do have done this important work without our Global AllyUP sponsor FCB Global, a company that have consistently demonstrated their commitment to upholding and safeguarding LGBTQ+ rights worldwide—the very essence of ally-ship. Nor could we do any of our work without Out Leadership's member companies (80 and counting!). To each of our member firms: Thank you for your dedication to equity every day and for supporting our vision for LGBTQ+ inclusion and business success.

This regional supplement for Europe is best accompanied by the call to action in the foundational AllyUp piece. AllyUp is designed to guide leaders in creating more space for education, advocacy, and activism.

In alliance,



Todd Sears



Executive Summary

This is the second in a series representing the first ever global Allyship study. Our global findings from over 5,000 respondents lead us to understand that intentional action is central to allyship. This is illustrated a consistent trend in our global research: Allyship is key to the experience of inclusion and must be more active at the individual and corporate level.

We want to thank our AllyUp sponsor FCB, our United States AllyUp sponsor EY, our Global Sponsor HSBC and all 82 of our member firms. We cannot do this work without your support.

The first volume AllyUP: United States outlined trends that are true globally, there is an Allyship Paradox: Individuals want laws and corporate protections for LGBTQ+ individuals, but their inactive allyship drives discrimination. AllyUP:Europe found this allyship paradox impacting the reality of inculson for LGBTQ+ Europeans. From our findings, from the United Kingdom, Italy, Germany and France, we identify 5 themes:

1. Corporate Policy and Non-Discrimination Laws do not translate to a more inclusive culture
2. Discrimination impacts individuals and the bottom line
3. Action centered allyship is a key to the culture shift
4. Impactful allyship takes risk
5. Progress can be erased (Poland)

Allyship must be a Verb

ally

al-ly

plural allies

To work

VERB

noun

along side

collaborator, listener, active accomplice, and advocate

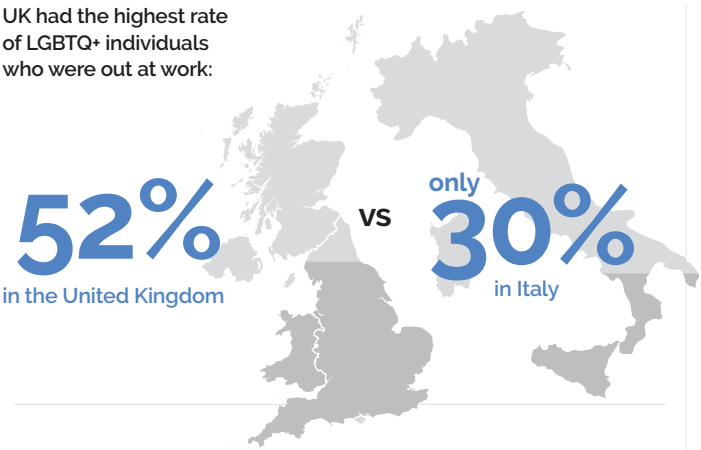
one that is associated with another as a helper

a person or group that provides assistance and support in an ongoing effort, activity, or struggle

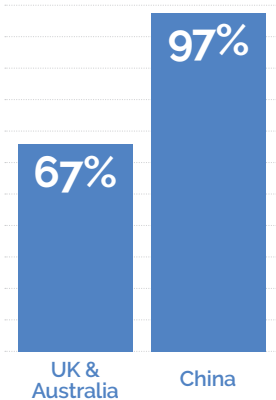
visible and consistent to

Study Highlights

UK had the highest rate of LGBTQ+ individuals who were out at work:



The UK and Australia had the lowest rates of covering behavior at 67%. China had the highest rate at a whopping 97%.

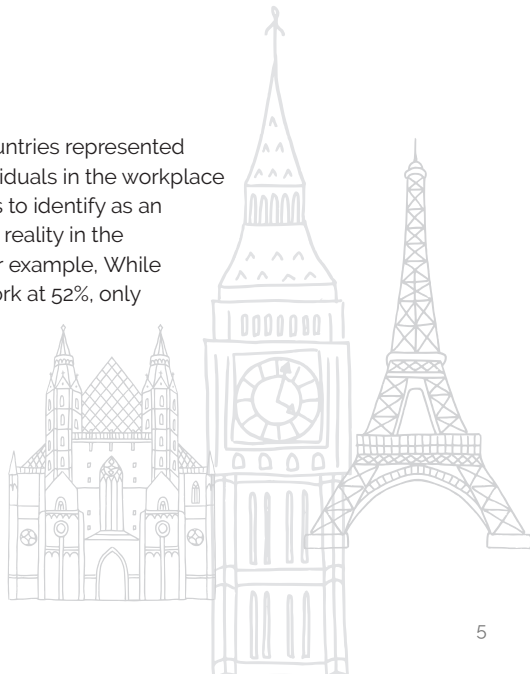


The #1 reason to not be out at work was not making others feel uncomfortable

AllyUP Europe Findings

The unique trends and findings for the European countries represented found that on average the condition of LGBTQ+ individuals in the workplace is better than the global average but that willingness to identify as an ally lags behind the global average. Additionally, the reality in the European countries surveyed varied significantly. For example, While UK had the highest rate of those who were out at work at 52%, only 30% of respondents in Italy say they are out at work.

One of our top findings is that when leaders make visible, vocal and consistent statements of allyship and back that with policies, we see the impact both in their organizations and the greater communities they serve. The power of corporate Allyship is the # 1 way Out Leadership sees progress.



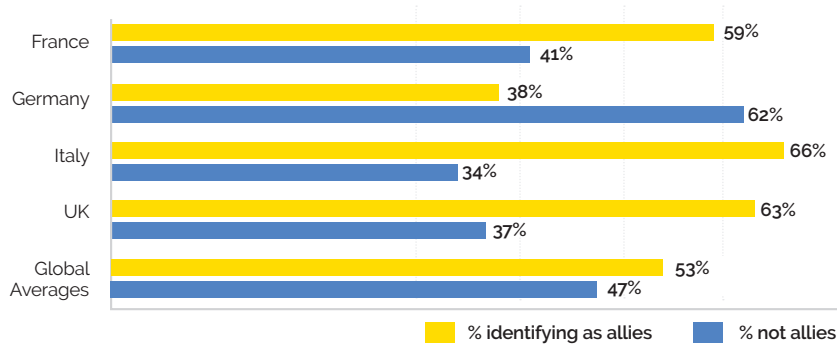
The Ally Paradox

Non-Discrimination Laws and Corporate Protections do not translate to culture in the European Workplace

Globally, just over half of the non-LGBTQ+ respondents self identify as an ally.

Italy had the most at 66% and China had the least at 27%

Non LGBTQ+ Respondents Allyship

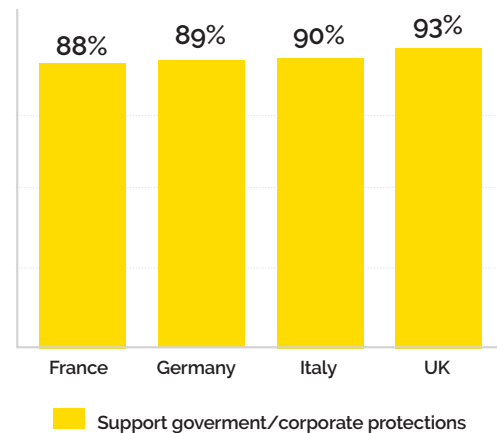


However, 90% of the non-LGBTQ+ respondents consider themselves LGBTQ+ friendly — defined as legal and/or corporate protections for LGBTQ+ employees

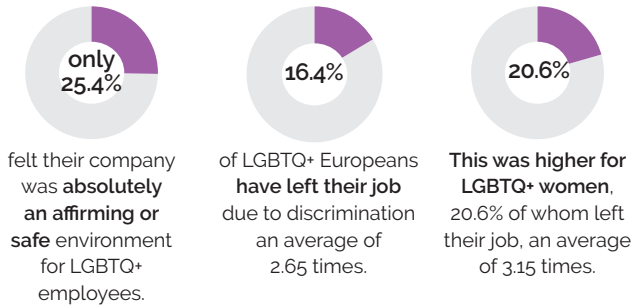


India had 41% of the non-LGBTQ+ participants reporting as a self-identified ally had 91% that identified as LGBTQ+ friendly

Support for Government Protections is Clear



Reality of Discrimination

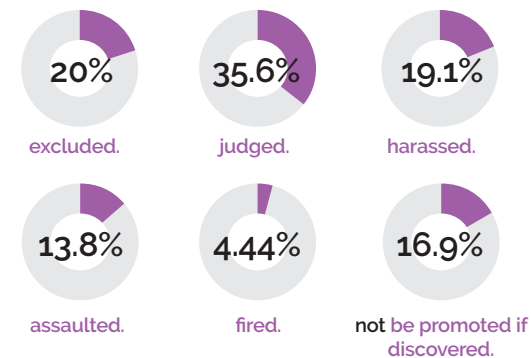


LGBTQ+ individuals spend

17.6%

of their time managing perceptions — this translates to loss of productivity.

Percentage of European LGBTQ+ employees worry they will be:



“When we understand that privilege, whether we call it white privilege, heterosexual privilege or gender privilege or the Italian national privilege, does not matter. But when we understand that privilege is the other side of the word power. And we understand that the power is something to give us the power to actually extend our privilege. Then we have all done a great leap ahead and we'll be able to trade that dignity which may be a support to them choose between two and help all the others.”

— Igor Suran, Executive Director at Parks Italy



The question you have to ask yourself is almost a question of character — Is this really a veneer or are we really changing the character and the fabric of our organizations?

There is a great quote; 'character is the tree and reputation is the shadow. The shadow is what we think of it; The tree is the real thing.' The more we can focus on changing the character aka, the tree, the shadow will just get bigger and bigger.

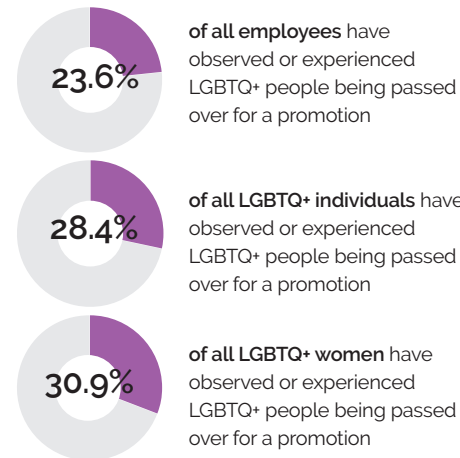
And that goes into policy. You know how we treat employees, where we do business, how we handle our customers and vendors that we give our money to. And then the shadow would get bigger and bigger.

— Lou Aversano,
CEO, Oglivy

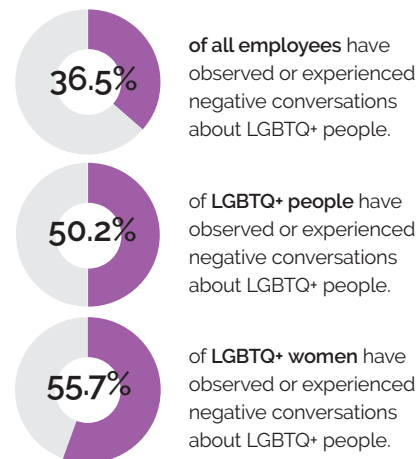


Lack of active allyship translates into a culture of discrimination

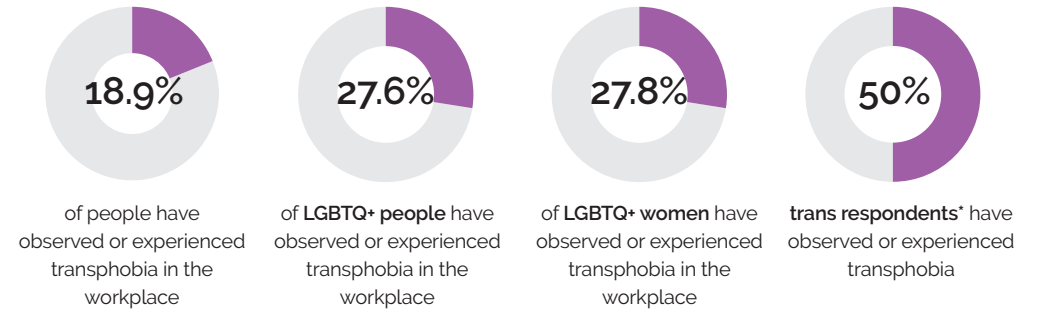
Career Advancement



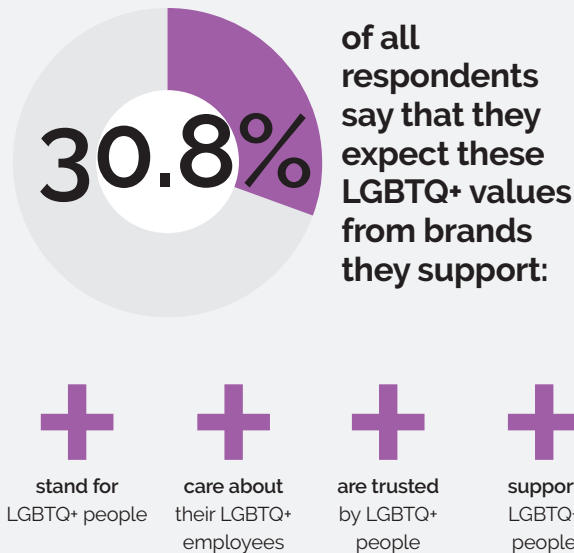
Not a Joking Matter



Transphobia in the Workplace



Your Brand Message Matters to Allies



case study

Barilla Pasta

case study

HSBC

The Costs of Passivity

COMPANIES THAT ARE PERCEIVED AS ANTI-LGBTQ+ RISK REVENUES, REPUTATION, AND FUTURE MARKET SHARE



Two women, holding hands, share a single strand of pasta. That image graced hundreds of boxes of spaghetti no. 5 that went out to winners of Barilla's 2018 World Pasta Championship.³ It's an arresting graphic, visually. But what makes it stunning is the about-face that it represents for the world's largest pasta maker, who in the span of five years transformed itself from the pariah of the LGBTQ+ community to its corporate poster child.

Barilla's race to restore its reputation began in late 2013 — almost as soon as Chairman Guido Barilla told thousands of Italians, on the nation's most popular radio show, that he would never do a commercial with a homosexual family "because we don't agree with them." If gay customers didn't like that, Barilla added, they could go buy another brand of pasta.⁴

Calls for a boycott by celebrities like Chrissy Teigen ensured that many customers, gay and straight, did precisely that. Sales took a slight dip. But as CEO Claudio Colzani explained to Bloomberg Businessweek, the real concern wasn't revenues, but reputation: "I was concerned about the market share, but I was much more worried about people perceiving Barilla as an out-of-date brand."⁵

In 2014, after Barilla fell 21 spots on the Reputation Institute's annual corporate ranking, Colzani embarked on a massive campaign to resurrect the brand's image. He appointed a chief diversity and inclusion officer and formed an external advisory board.⁶ He revamped "Share The Table," marketing that positions pasta as the centerpiece of the family dinner, to feature families other than the traditional one Guido Barilla had insisted was emblematic of the brand (Table Advocates included Vicki Reich, an LGBTQ+ parent).⁷ So concerted was his campaign that Italian illustrator Olimpia Zagnoli stopped boycotting and started collaborating with the brand in 2017 to produce its limited-edition box design. "It turns out while I was protesting in my kitchen, Barilla made significant progress, radically redefining its code of ethics and adjusting its internal policies," she told itsnicethat.com.⁸

Today, Barilla's reputation is outstanding. Human Rights Campaign has bestowed a perfect score on Barilla since 2014; in 2017, the advocacy group honored the company with its Corporate Equality Award.¹⁰

Enlisting allies to advocate for change worldwide

A RAINBOW RUN IN HONG KONG. SPIRIT DAY IN MEXICO. PRIDE PARADES FROM AUSTRALIA TO CANADA, WITH 20 IN THE UK ALONE.



HSBC Pride, the bank's global LGBTQ+ employee resource group, is the driving force behind each of these seminal events, staged to promote inclusivity not just at the office but in the larger community. With 7,509 members—both LGBTQ+ employees and coworkers who identify as their allies—in 28 countries, HSBC Pride strives to leverage the power of allyship in achieving LGBTQ+ equality wherever HSBC does business worldwide.

That's especially important in countries where cultural and legislative restraints on LGBTQ+ individuals continue to deny them the rights enjoyed by their fellow citizens. For example, in April 2019, HSBC's Indian Pride chapter joined forces with 45 organizations to convene "Amplifying Pride," a conference with NASSCOM, a not-for-profit software and services industry association; it was the first event to celebrate the Indian Supreme Court's ruling that Article 377, which criminalized same-sex relations, was unconstitutional. The bank is proud to have newly formed Pride chapters in both India (196 members) and China (51 members).

Ally activism has also proven transformative in Mexico, where HSBC supported a day of speaking out against LGBTQ+ bullying and harassment, which LGBTQ+ youth are disproportionately likely to suffer. While same-sex relations were decriminalized nearly 150 years ago in Mexico, cultural norms have been slow to embrace alternatives to binary gender designations and heterosexual orientation.

While the concerted action taken by HSBC allies has helped evolve those norms, it has also helped the bank to burnish its brand. Following the launch of "You Are Pride," a campaign promoting inclusivity across social media platforms, the UK Pride chapter (2,495 members and counting) earned a 89-percent positive brand sentiment for the bank.

"When we stand together on equality and inclusion," says Ashley Flight, head of Digital Engagement at HSBC in London, "we not only inspire those values in our clientele, we also win their loyalty."

There's never been a better time to

ALLY UP™

globally 31%

of workers think it's inappropriate
for LGBTQ+ people to be open about
their identities at work.

*Estimated LGBT Purchasing Power: LGBT-GDP" LGBT Capital, August 2015. Accessed June 16, 2020 at http://www.lgbt-capital.com/docs/Estimated_LGBT-GDP_%28table%29_-_July_2015.pdf

Estimating that each LGBTQ+ individual has between 5-15 allies- the Ally Marketplace is 10 times that of the LGBTQ+ market. -Todd Sears

Exclusion persists in the European workplace.

And it's a problem.

Companies simply cannot afford to lose talented employees or their hardly earned customer base. The "Ally Marketplace" represents 37 Trillion dollars. This call to action is one that rings true because of the need to value and meet the needs of our LGBTQ+ talent and because it has a undeniable impact on business. Action centered allyship is imperative.

The research makes clear that "ally" isn't yet the verb it needs to become in our companies and in our larger communities. To create the changes needed, we see action at three levels: Individuals must educate and engage coworkers and be willing to take the risks that active allyship implies. Companies must "activate" both allies and LGBTQ+ individuals to create inclusivity within their walls, and to serve as an example of inclusivity beyond their walls. And business leaders must commit to being seen and heard as LGBTQ+ advocates on a consistent, collaborative, and compounding basis in order to promote equitable practices in the larger community. How to go about this important work? Drawing on this robust research as well as the growing body of work that Out Leadership has penned or collaborated on, we've created a road map that will deliver greater equality for all, both in and outside the workplace.

Being an ally is not who you are, but what you do.

All of our research and work over the past 10 years

has confirmed that impactful allyship takes risk and the more risk the ally takes the more reward, or impact, to the LGBTQ+ person.

We have taken it a step further and created a series of matrices that illustrate the direct correlation between allies' risk and the impact to LGBTQ+ colleagues.

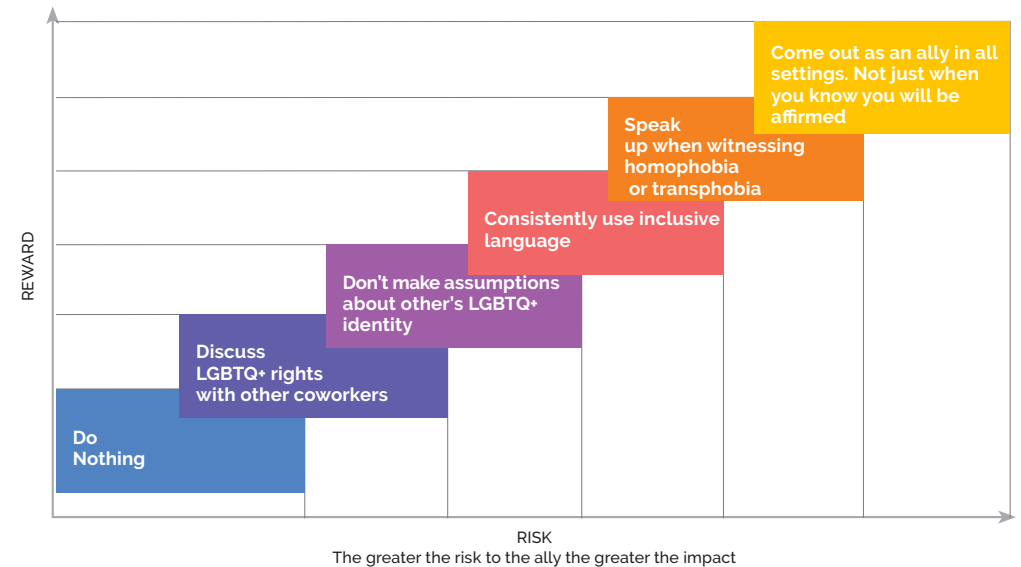


A Call to AllyUP

What Individuals Can Do

THE OUT LEADERSHIP RISK - REWARD MATRIX

In response to discrimination against a coworker...



Individuals MUST...

AllyUp™ for each other.

History shows us that subsets of the LGBTQ+ community suffer oppression within the community (i.e. bi-phobia, transphobia). Indeed, while allyship seeks to advance inclusion of all people from marginalized communities, we know racism and exclusion to be as virulent within the LGBTQ+ community as outside it. But few LGBTQ+ individuals wish to acknowledge this intolerance. As a study by Stonewall UK noted, "The prevalence of racist attitudes within gay sub-culture is often pushed under the carpet." So, while *AllyUp™* focuses on

mobilizing the allied power of straight and cisgender individuals within corporate entities, it is vital to acknowledge and inspire the work that still needs to be done within the LGBTQ+ community.

Look within before insisting that others change.

The straight and cis-gender community must likewise examine their own implicit biases. If you have looked twice when you've seen two men walking down the street holding hands... or have laughed at a joke at the expense of the LGBTQ+ population... or have used heterosexual pronouns before learning

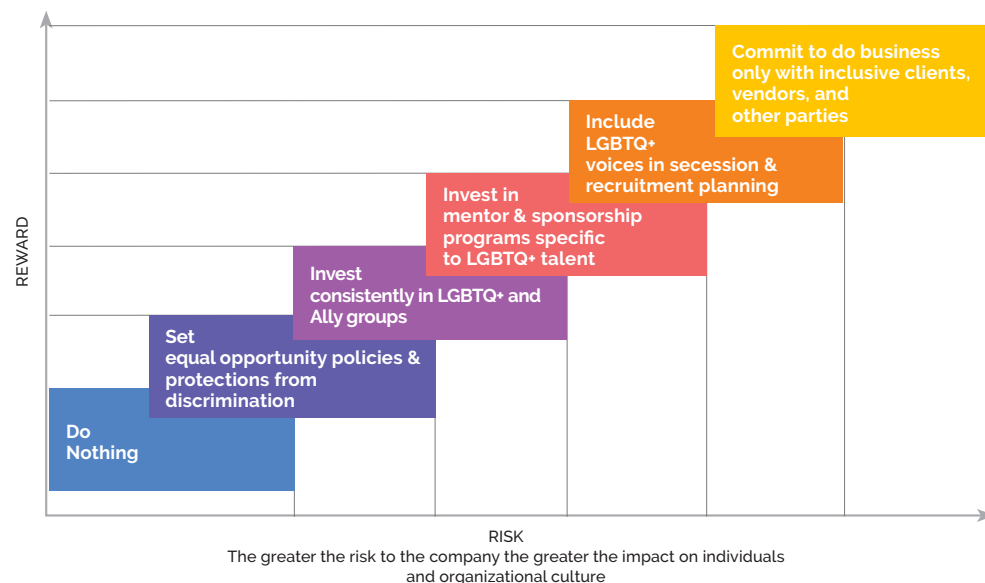


A Call to AllyUP

What Companies Can Do

THE OUT LEADERSHIP RISK - REWARD MATRIX

To activate allyship across the enterprise...



Companies MUST...

Equip employees with the education and training they need to embrace risk.

ALLIES AREN'T BORN; THEY ARE BUILT. We should not expect anyone to know how to intervene when a coworker is being harassed or demeaned, nor how to speak out on that person's behalf. Taking risks—and that's what intervention entails—isn't easy even when you're clear that action is required. There is a distinct difference, after all, between an ally and an accomplice, whose actions, as defined in the context of white privilege, are meant "to directly challenge institutionalized racism, colonization, and White supremacy by blocking or impeding racist people,

policies, and structures." Ally programs must not merely inform, but also train individuals to be action-centered and risk-embracing.

Encourage and incentivize management to model active allyship.

Employees need education, and opportunities to engage with and advocate for the LGBTQ+ community. But most of all, they need exposure to managers and leaders who have the courage to walk their talk. Being proactive, rather than reactive, entails risk. Leaders mitigate that risk when they show their followers they will not stand by silently when a colleague is the target of discrimination.

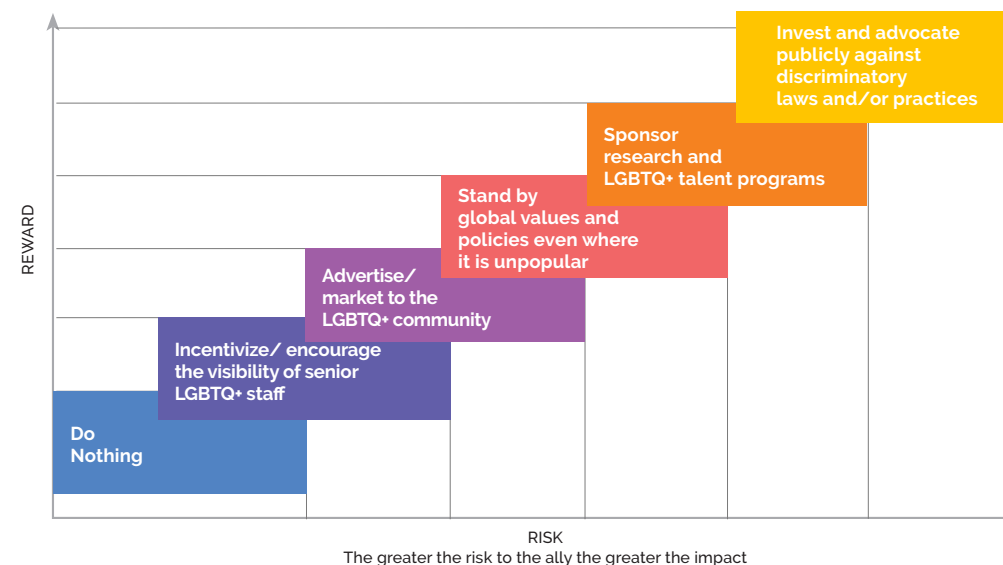


A Call to AllyUP

What Leaders Can Do

THE OUT LEADERSHIP RISK - REWARD MATRIX

To promote LGBTQ+ equality in the larger community...



Business Leaders MUST...

Take every opportunity to be heard, as well as seen, as a proactive ally and advocate.

Allyship will achieve equality for all when leaders model active support not just to their workforce, but also to the larger community. Leaders must speak up not just at an enterprise-wide town hall, but in the town as well; must not only protest discriminatory practices at the state level, but also join together with other business leaders to leverage concerted economic clout. Leaders who take these actions telegraph to the workforce, the community, and the legislature that equality concerns us all.

So why don't more CEOs model such actions? They perceive too much risk, and too little reward, in being highly visible public advocates.

In our collaborative research with the Center for Talent Innovation, a research non-profit based in New York, we found that the number-one action that leaders believed would show their allyship was to attend their Pride network's cocktail hour. In contrast, our own research affirms, what LGBTQ+ individuals identify as the most powerful intervention is for leaders to show up and speak out on behalf of LGBTQ+ equality at events throughout the year—not just within the company but in settings outside it as

When a business leader in London uses a rainbow flag coffee mug,

it is, of course, meaningful to individuals in that setting. But, given the favorable business climate in the United Kingdom, it does not take significant risk. In contrast, a leader in Warsaw who sports that same mug is taking a much larger risk, given the unfavorable business climate in Poland. Yet by doing so, they send a powerful signal to the LGBTQ+ employees of the company.



Business Leaders MUST... *continued*

well. That's the essence of Allying Up: consistent, collaborative action that compounds over time.

Is such action risky?

Absolutely. We who have come out to friends and family and colleagues know just how much courage it takes to identify ourselves to those who might spurn or punish us for it; we can well understand how a cis-gender leader might shrink

from identifying as an LGBTQ+ ally. Yet we also know, because we've seen it among our members, that risk compounds reward: leaders who make sure LGBTQ+ individuals are seen and valued unleash a ripple effect that secures workforce loyalty, attracts top talent, and wins new customers.

Doing the right thing for people does the best thing for the bottom line.



Country Focus

Poland

Anti-LGBTQ+ rhetoric in Poland and the role of the private sector

by Fabrice Houdart

THE RECENT VIRAL ANTI-LGBTQ+ RHETORIC in Poland has been best described by Outright Action International: "nearly 80 Polish municipalities declared themselves 'LGBT-free zones' last year. These zones promote intolerance and create hostile and violent environments for LGBTQ+ people, undermining basic human rights, and yet an ever-growing number of places around Poland continue to declare themselves as such.. In addition, to hate speech, Human Rights Watch reported in early August 2020 warned that "the police have arrested LGBTQ+ rights activists for peaceful protest actions on the basis of an overly broad blasphemy law, violating freedom of expression". As a result, the European Parliament members referred Poland to European Commission over LGBTQ+ arrests. The EU did react by rejecting small amounts of funding to six communities that had declared themselves to be "LGBT-free zones".

While it is crucial to place these recent developments in Poland in a wider context of human rights degradation in the country, LGBTQ+ people have been singled out as political pawns for electoral purposes.

“You lead and create an environment for your people that should be inclusive respectful and safe . . . Don't quote the law book to me as a leader, as a leader create a work environment that is appropriate for your people. And you can do that in every market, every regime in the world: you can work to create a safe welcoming environment.”

– Noel Quinn,
Group CEO —
HSBC



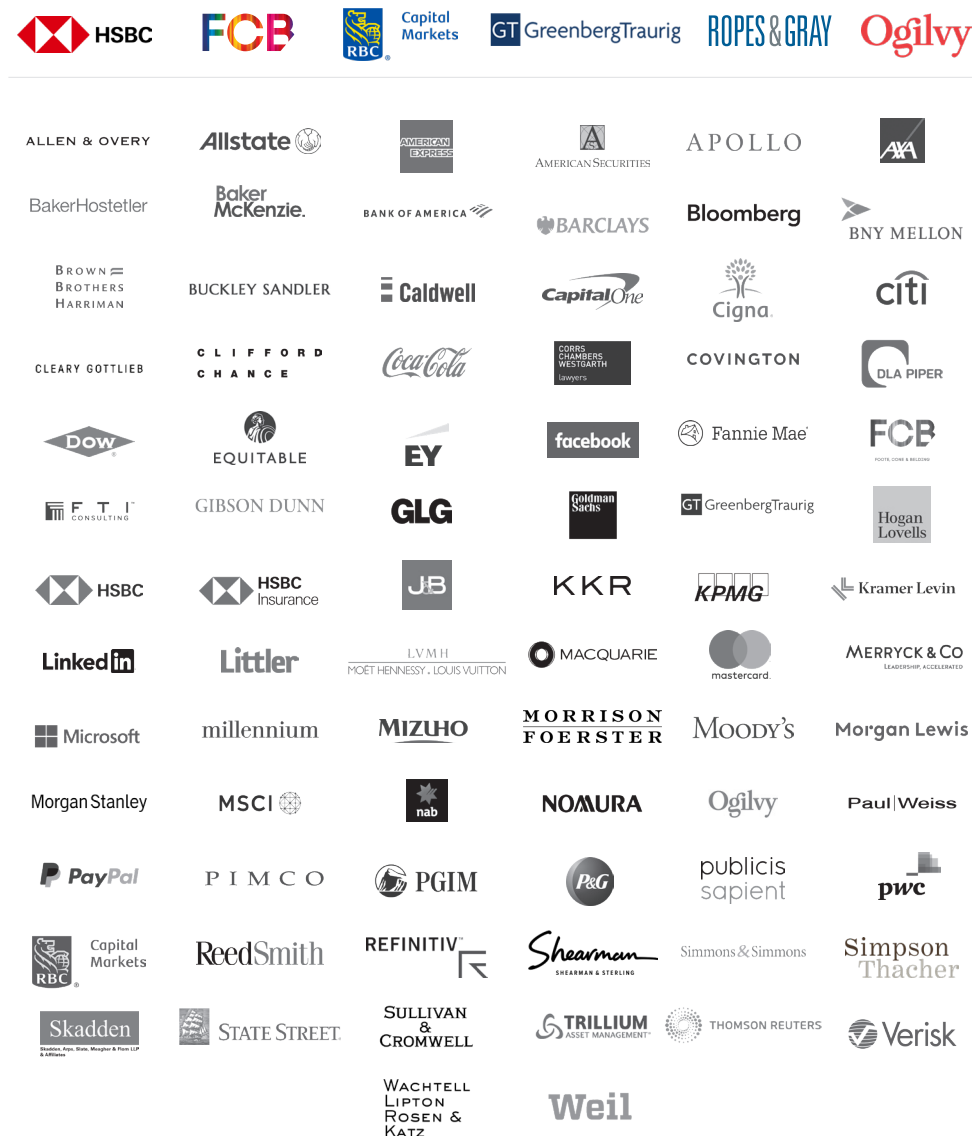
LGBT free zone sign in Poland

In that sense, the obvious manipulation of anti-LGBTQ+ sentiments for political purposes is the proverbial canary in the coal mine. Like coal miners used caged canary birds, whose death was a warning sign of toxic gases in the mine tunnels, LGBTQ+ people in Poland are a warning sign of the rise of populism in parts of Europe.

It is also important to remember that anti-LGBTQ+ sentiments in Poland preceded the instrumentalization of LGBTQ+ people by political leaders. The Campaign Against Homophobia (KPH) reported previously that 70% of Poles identifying as LGBTQ+ experienced violence based on their identity in the last two years and similar numbers of teens declare having suicidal thoughts. The results of an ILGA survey also showed that only 42% of Poles believe that people who are homosexual should not be treated as criminals placing Poland below the level of acceptance in Russia. Additional efforts were needed to tackle cultural prejudice against sexual minorities in Poland.

Out Leadership believes we can leverage the power of the private sector to respond to anti-LGBTQ+ rhetoric in Poland. This means enrolling the power of our 80+ member companies in a sustained coalition effort with other similar efforts by We Are Open and the Rainbow Business Network. Out Leadership is encouraging the private sector to join efforts to urge the Polish Government and the members of the Parliament to consider carefully the potential impact of this backsliding on human rights on business and the economy at a time where the global economic context is fragile. While the Polish economy is faring well (Poland is now the sixth-largest economy in the EU), it Poland is very dependent on foreign investment. Out Leadership also believes that the private sector can demand from the European Union to do more to promote societal change on LGBTQ+ issues across Europe. Finally, we are convinced the private sector can find various ways to support grassroot movements and contribute to social change with locally based solutions including through marketing and communication efforts.

Out Leadership Members



Allyship is a call to action.

Corporate allyship has the potential to impact the communities that have the farthest to come on LGBTQ+ inclusion. Companies around the world must ALLYUP to the LGBTQ+ and intersectional communities. We know this takes risk, but risk compounds impact in Allyship. Institutions who recognize that providing an inclusive environment is both the right thing to do, and the right thing for business succeed. Inclusion catalyzes relationships, productivity and retention. The reality in Europe variable and complex but the call to allyship is universal. Individuals, leaders , and organizations must put consistent, collaborative and visible action at the center of their allyship.

The answer is clear: Allyship must be a verb.

Special Thanks

Thank you to Out Leadership's Global Advisory Board members, and our member companies' senior leaders and thank you to our member firms whose ongoing commitment to being corporate allies moves equality forward in their workplaces and communities. Special thanks to our global sponsor HSBC and the ALLYUP Global sponsor FCB.

Out Leadership

Todd Sears	Founder & CEO
Marco Martinot	CFO
Jane Barry-Moran	Manager of Programs & Partnerships
Fabrice Houdart	Managing Director of Global Advocacy
KJB	Data Analytics
Chris Fredrick	Managing Director, Global Events
Luigi Lewin	Managing Director, Sales
Stephen Smith	Head of Marketing
Kenya Simon	Manager of Member Relations
Kelly Ver Haeghe	Events Coordinator
Michael Tighe	Associate, Executive Projects

Booklet Design by Caroline Bishop,
Care Creative

Thank you to those that helped make the
foundational US AllyUP:



Carol Winer Creative Direction + Design
Melinda Marshall Content Strategist, Managing Editor



Brandon Cooke	Global Chief Communications Officer
Melanie Mitchem	SVP, Director of Global Communications and PR
Margot Byrne	Global Corporate Communications Senior Associate
Vita Harris	EVP, Chief Strategy Officer
Danni Bayn	Strategic Analytics Director
Eline Goethals	Strategy Director
Andrea Allison	Strategic Analytics Supervisor
Lipsa Mishra	Strategy Analyst

FCB Creative

Avital Pinchevsky	SVP, Executive Creative Director
Bruno Mazzotti	VP, Creative Director
Derah Gordon	VP, Creative Director
Derrick Yousefi	Copywriter
Victoria Rosselli	Art Director
Renato Lima Oliveira	Associate Art Director
Thomas Jack Fleming	Designer
Melissa Moreland	Director, Project Management



[OUT] LEADERSHIP

Certified



nglcc
National LGBT
Chamber of Commerce

Top 10% of B-corps for the last 8 years

Disclaimer Out Leadership has made all efforts to ensure that the information contained within this report is accurate and up to date as of September 15, 2020. This work is provided for educational and informational purposes only, and should not be construed as legal advice. The information is not guaranteed to be correct, complete or current. If you would like to suggest an edit to this ongoing project, please contact info@outleadership.com