

# Going Global with LGBT+ Inclusion Policies at IBM

**M. V. Lee Badgett**

Professor of Economics  
Center for Employment Equity  
University of Massachusetts Amherst

# Executive Summary

This report is the second in our series of case studies exploring IBM's innovative practices in corporate diversity and inclusion (D&I) for LGBT+ employees. In this case study, we focus on IBM's global expansion of its LGBT+ inclusion practices, drawing on interviews with IBM officials and company documents.

For IBM, these practices often began in Canada, the UK or the United States, and many have been extended to IBM's locations in other parts of the world.



#### Internal LGBT+ employee groups:

IBM has a global web of internal groups of employees who offer connection, support, and/or the opportunity to work on LGBT+ issues in some way. This network covers virtually every LGBT+ IBMer in the global workforce.



**Benefits:** IBM offers benefits for same-gender partners in over 50 countries, where it is not offered by national health plans, covering a large proportion of IBM employees. Health care benefits that include gender-affirming care for transgender employees are currently offered in 11 countries.



**Gender transitions:** IBM has developed a global "best in class" framework for supporting employees who go through a gender transition in an IBM workplace, including widely accessible online training modules.



**Self-ID:** IBM offers employees the option to self-identify as LGBT+ in the human resources system in 40 countries.

Historically, the expansion of IBM's global policies and programs have benefited from both a proactive and reactive dynamic. In a proactive dynamic, IBM diversity and inclusion leaders look for opportunities to implement LGBT+-inclusive policies and practices where they do not currently exist. A reactive dynamic comes into play as the company responds when individual employees push for implementation of IBM's policies in additional jurisdictions.

Taking LGBT+ inclusive policies and practices into every location raises challenges, however, since IBM operates in countries and cultures with very different levels of inclusion of LGBT+ people. Overall, IBM's successes in overcoming those challenges point to strategies for expanding inclusion globally that are potentially relevant for other employers:

A global policy serves as an important tool for motivating and discussing change at local levels and for overcoming resistance based on non-business rationales. Global policies also inspire leaders to be proactive in taking on challenging situations.

Developing lines of communication between LGBT+ employees and corporate leaders is crucial for revealing employee needs. It also empowers employees to push for change at the local level. Technology can help to bridge gaps between less open LGBT+ communities and corporate leaders.

Where LGBT+ employees are reluctant to be open and to lobby directly for more inclusive policies, allies' voices can be effective in reducing local resistance and enabling new policies to be implemented. Both the policies and the visible presence of allies may help create a more supportive environment for LGBT+ employees who can then be more open.

While laws criminalizing same gender relations appear to be practical barriers to making practices more inclusive, companies may find greater room than is first apparent. A closer analysis of such laws and how they are applied can reveal space for implementing inclusive policies internally in ways that are safe for LGBT+ employees.

For some internal changes to policy and practice, finding local expertise in health care is also likely to be important for making health benefits more LGBT+ inclusive.

# Introduction

This report is the second in our series of case studies exploring IBM's innovative practices in corporate diversity and inclusion (D&I) for LGBT+ employees. In this case study, we focus on IBM's global expansion of its LGBT+ inclusion practices. For IBM, these practices often began in Canada, the UK or the United States, and many have been extended to IBM's locations in other parts of the world.<sup>1</sup> Taking those policies and practices into every location raises challenges, however, since IBM operates in countries and cultures with very different levels of inclusion of LGBT+ people. This report analyzes how and where IBM has overcome those challenges to implement its global policies of LGBT+ inclusion internally.

For eighteen years in a row, IBM has received a 100% score on the Human Rights Campaign's Corporate Equality Index, indicating the company is on the leading edge of LGBT+ inclusion in the United States. In recent years, IBM has also received awards or top marks on LGBT+ inclusion measures in Australia, Canada, Chile, Colombia, India, Japan, Mexico, New Zealand, Slovenia, Sweden, and the United Kingdom.<sup>2</sup> These awards indicate that over time some of these LGBT+ inclusion policies have made their way to IBM operations in other countries, and the awards establish IBM as a global leader in LGBT+ inclusion.

The report begins with an overview of the status of LGBT+ inclusion in IBM's policies and practices across its global locations. As suggested by the awards, IBM is known for being an early adopter of LGBT+-related policies. IBM included sexual orientation in its global nondiscrimination policy in 1984 and added "gender identity or expression" to the policy in 2002. IBM was the largest company to offer domestic partner benefits to U.S. employees in 1997. Although much of the global focus has been on employee benefits and nondiscrimination policies, this report also includes other internal practices that have been adopted (or not) across many of IBM's locations.

In the third and fourth sections, the report presents findings from interviews with company officials and the analysis of company documents to discuss the factors that have shaped the expansion of LGBT+ related policies, with a focus on identifying challenges and facilitating factors. IBM has employees in almost 100 countries around the world, including countries with a wide range of legal constraints and cultural orientations that affect LGBT+ people and the companies that employ them. Not surprisingly, this analysis identifies the importance of local context, including cultural norms and existing laws, as factors influencing when and where LGBT+ inclusive policies are extended. Other factors that are relevant include corporate leadership commitment, employees' expression of needs, support or resistance from local managers, the presence of LGBT+ supportive allies, and the availability of needed services. In the fifth section, we look to the future for continued expansion of policies and lessons relevant for other multinational employers.

# LGBT+ inclusive policies worldwide

With a global workforce of over 300,000, IBM operates in 170+ countries and supports IBM offices in 100 countries.<sup>3</sup> Since the mid-1990's, IBM has worked directly with its LGBT+ employees to advance inclusion in benefits policies, recruiting, professional development, and other business areas.<sup>4</sup> With early and successful efforts to establish practices for LGBT+ employees in Canada and the United States, IBM became well-known as an innovator and leader on LGBT+ issues. The expansion of inclusion efforts to other parts of the world has taken time, though. This section outlines the extent of global coverage for several key policies and practices related to LGBT+ inclusion, benchmarking IBM's progress to other companies where possible.



## Internal LGBT+ Employee groups

Having an LGBT+ employee resource group (ERG) is one of the earliest indicators used to measure corporate LGBT+ inclusion. By 2020, 94% of the companies rated in the Corporate Equality Index reported some form of LGBT+ employee resource group.<sup>5</sup> However, of those with an ERG, only 40% of those ERGs were available globally. In another 35%, the ERG was available in some countries only.

By this benchmark, IBM is clearly in the most expansive group. Rather than simply creating a single employee resource group, IBM has a global web of internal groups of employees who offer connection, support, and/or the opportunity to work on LGBT+ issues in some way. Putting these efforts described below together, everyone in the IBM global LGBT+ workforce has a means to connect with other LGBT+ employees, creating networks that have been useful for promoting change globally.

The **Global LGBT+ Executive Council** sits at the heart of this web. Founded in 1995, the Global Executive Council is led by senior executive sponsors (a senior vice president and a human resources executive), the Global Diversity leader, and two co-chairs, most of whom are LGBT+, with one leadership slot sometimes held by a straight ally. Members of the council include roughly 30 **“Out Executives,”** who are high level executives and visible role models. The Council's main leadership duty is creating an annual set of “vital few priorities” that guide IBM and its LGBT+ leadership efforts throughout IBM's locations. The Council turns these vital few strategic priorities into annual goals and implementation plans (or workstreams) for expanding LGBT+ inclusion, led by particular Out Executives.

Joining the Out Executives to conduct that work are IBM's **“Out Role Models.”** IBM began the Out Role Models program in 2016, and by 2020 there were more than 133 Out Role Models from 31 different countries. These early- to mid-career LGBT+ employees act as advocates for diversity and inclusion of LGBT+ people at IBM in different ways,

mostly working with Out Executives to implement the vital few priorities. For example, to publicize the self-ID program, Out Role Models from several countries recorded videos in their own languages to explain the importance of participating in the program. Out Role Models might speak at local events or write blogposts for the company's Pride Gateway, the intranet site for LGBT+ employees. These IBMers gain internal visibility and have a chance to meet with senior leaders in the course of their work on the vital few priorities.

More broadly, IBM has numerous **Business Resource Groups** (BRGs) that pull together groups of people with some common interest or bond.<sup>6</sup> The 52 LGBT+ BRGs around the world are led by volunteer employees and create an LGBT+ community within different IBM locations. According to one long-time IBM leader, the role of these employee groups has evolved over time from networking and support to making contributions to IBM's business goals. The BRGs might reach out to the LGBT+ community at events to assist with recruitment of new employees. Internally, the BRGs help with "talent development" by connecting employees to professional development opportunities and through organizing activities for LGBT+ employees that enhance employee retention. Also, some BRGs might engage with clients to develop business opportunities. LGBT+ employees who want to remain anonymous can connect with other LGBT+ IBMers through a separate Slack workspace created for that purpose.

Since 2001 IBM has had a **LGBT+ Global Business Development Team**. Today that team is a "global customer-facing organization," acting as a consulting practice on human resources and inclusion for IBM clients and working in more than 40 countries. The team works with companies from a variety of industries to help them become more LGBT+ inclusive, conducting trainings and developing E-learning courses such as *Becoming an LGBT+ Ally and Workplace Transition Framework*.<sup>7</sup>

Taken as a whole, these formal efforts make LGBT+ people highly visible at IBM. For example, in 2018 LGBT+ groups held more than 100 events in more than 12 countries. They also provide opportunities for LGBT+ employees in every location to share information and to influence their workplace experience as LGBT+ individuals. As discussed further below, this collective energy often fuels cultural change and policy change within IBM.

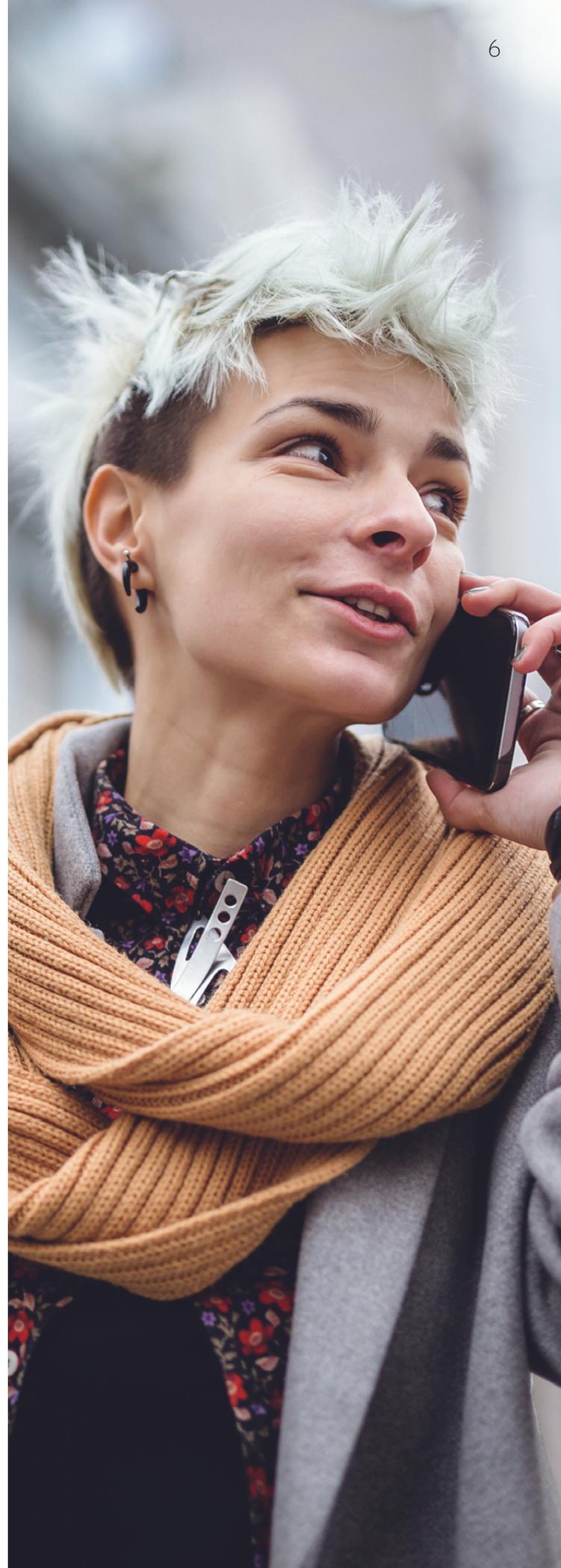


## Employee benefits

Globally, much attention related to LGBT+ inclusion in the workplace has focused on fringe benefits. IBM provides health care and leave benefits for its employees and their family members. LGBT+ inclusive benefits include the coverage of same-gender spouses or partners and transgender-inclusive coverage in health plans. IBM first rolled out benefits for same-gender partners in Canada in 1994, followed by the United States in 1997. Now IBM offers benefits for same-gender partners in approximately 50 countries, where not available in national health insurance plans, covering a large proportion of IBM employees.

Health care benefits that include gender-affirming care for transgender employees (such as transition-related hormone treatment or surgical procedures) are currently offered in eleven countries: US, Canada, India, UK, Ireland, Hong Kong, Brazil, Mexico, Thailand, Philippines, and Singapore. This list includes the countries with the largest IBM workforces, so most IBM employees have access to gender affirmation coverage. In some cases, IBM also supplements benefits for gender-affirming care that is provided by a national health insurance program.

It is difficult to benchmark IBM's benefit inclusion in the global corporate arena. Relatively few global companies offer LGBT+-related benefits to their locations in all countries. The Human Rights Campaign reported in 2020 that when companies offer LGBT+ inclusive benefits in the U.S., less than half of those companies offer them in all countries where they operate. Only 46% offer domestic partner benefits in all countries, and 30% offer transgender-inclusive benefits in all.<sup>8</sup> A similar percentage of global companies offers those benefits in only some of the countries they operate in, as is the case for IBM. However, few of these other companies are likely to have the global breadth of IBM's locations. Because we don't know which countries these companies are operating in, it is not possible to directly compare IBM's efforts, but IBM is clearly among the most inclusive with respect to benefits, and as described later, was an early adopter in several countries.





## Gender transition framework

IBM has developed a global “best in class” framework for working with employees who go through a gender transition in an IBM workplace.<sup>9</sup> Transitioning employees are invited to work with their managers and diversity staff to put together a team to assist them in planning their transition at work. The process is tailored to an individual employee’s needs, preferences, and situation. What is key is that the transitioning employee drives the process in all respects. That plan includes a timeline and may include disclosure to others (including clients) and communications strategies.

The transitioning employee, their manager, and their work team can receive training about the process from an online course through IBM’s Leadership Academy. The course content includes (among other topics) relevant terms, the process for creating a workplace transition plan, how to provide support for the transitioning employees, and videos of other transgender IBMers telling their own stories. These course modules are updated and improved based on experience in accordance with best practices.

Another innovative aspect of IBM’s framework is that these training resources are made available to IBM employees in countries where the content is not subject to local restrictions. In addition, IBM has shared this course more broadly to assist other companies with their own gender transition guidelines. The course is available in IBM’s Leadership Academy and is promoted on the Pride Gateway.



## Self-ID

In 2006, IBM became the first large corporation to allow employees to self-declare their LGBT+ status in the company’s human resources system, as discussed in our first “What Works” report on IBM.<sup>10</sup> Participation in this program is assessed on a country-by-country basis, with criteria including local data privacy laws and employment law as well as laws impacting the LGBT+ community. Currently IBM offers employees the option to self-identify in 40 countries. The company continues to look for opportunities to expand self-ID into additional countries as laws and attitudes evolve.



# Glocalization of LGBT+ inclusion at IBM

Explaining the globalization of these IBM's LGBT+ inclusion policies is complicated. IBM's early LGBT+ agenda was driven by employees in the United States, Canada, and Europe, and changes to the company's policies and practices started there as well. Moving beyond those initial places required adaptation. One IBM leader involved in this effort explained, "You can't take a U.S. model for advocacy and just cut and paste it into other countries. It has to be localized. Local etiquette, local laws, data privacy comes into consideration." He pointed to IBM's "glocal" approach to applying a global diversity and inclusion strategy by adapting it to the local level. Another IBM official put it simply when asked about how practices spread to locations in other countries: "It's really hard for us to say anything other than 'it depends.'" She pointed to the size of an IBM facility, the company's respect for local cultures, and local expertise as shaping where and how LGBT+ policies are extended.

Data gathered from interviews with IBM officials and internal company documents suggest that two main dynamics inside IBM have driven the "glocalization" of LGBT+ inclusive policies and practices, one proactive and one reactive. In the proactive dynamic, IBM diversity and inclusion leaders look for opportunities to implement LGBT-inclusive policies where they do not currently exist. The more reactive dynamic comes in the company's responsiveness to employee voices when individuals push for implementation of IBM's global policies at the local level.

## Proactive dynamic

Proactive leaders with a special focus on LGBT+ issues have been influential in expanding inclusive policies at IBM. One interviewee reported that the IBM diversity and inclusion team's guiding strategy is to look around the world and ask, "Where do we think the time is now to influence change?" For instance, one official thought that IBM was currently being very proactive on transgender and non-binary issues: "The benefits team are constantly looking and trying to push and see how much further we can take benefits, where we can be rolling them out more."

To successfully apply this strategy requires IBM leaders who have a strong motivation to overcome potential barriers to change (see more below on barriers). One D&I leader provided an example of how that motivation emerges. She made a point to meet in person with LGBT+ employees in several countries with unfriendly legal climates for LGBT+ people, including some where homosexual relations are criminalized. She saw a stark contrast between the openness of LGBT+ employees in the U.S. and the very different reality for LGBT+ IBMers in other countries. In India, for instance, she noted, "They all entered from a different door, and they put the blinds down." Furthermore, they could be relatively open about being LGBT+ inside IBM but not outside the company walls. Seeing these differences inspired her to make greater efforts to push for change at IBM:

*“I felt compelled to make a change. I could have made every excuse not to go that way—it’s really hard, the legislation is against us, it’s a really a small part of the population, why would I invest time in that. And then I decided—no. I decided to say we’re going to make these changes...and make them to impact...the customers that we touch, the clients that ask for our services, not only the employees. Because this is about principle, and about values, about equality. Modifying a benefit? It’s a process, it’s an outcome. But the truth is you are changing the way that people understand what you stand for.”*

This leader went on to push IBM to add LGBT+ inclusive benefits in 15-20 more countries. She pointed to the psychological rewards she received from her efforts, such as her emotional meeting with the first IBMer who took advantage of a benefit (gender affirmation surgery) that she had successfully advocated for. “He couldn’t talk, he was so emotional. He just hugged me. That’s what we do this for. We do it for the individuals. They live a better life.”

## Reactive dynamic

The second dynamic is more reactive, as IBM responds to employee voices. LGBT+ employees sometimes explicitly ask the company for the policies and practices in IBM’s operations in their country that they learn about in other IBM locations. One D&I leader sees this process as “creating a channel for other areas of the world to stand up and say, well what about us?” Those employee voices often emerge by bubbling up internally through local human resources staff.

For example, corporate D&I leaders got a request to implement domestic partner benefits in the Philippines from a human resources official, a “young heterosexual guy,” as one interviewee noted. But they eventually learned that he was responding to a request and proposal put together by two out lesbian IBMers in the Philippines. The potential influence of even a small number of individual voices makes sense in a context where the LGBT+ employee population in a given location might be very small, particularly for transgender employees or non-binary employees.



One official referred to “serendipitous” moments in employees’ lives that created an opportunity for changing policies. Those moments might include a new marriage, a job transfer, or a gender transition. For example, the head of the LGBT+ Business Resource Group in China had learned about domestic partner benefits for same-gender partners in IBM locations in other countries. When he began making plans to marry his male partner, he approached human resources and asked the company to add benefits for same-gender partners in the China region. In 2010 the company took the first step by including same-gender partners in leave policies. The following year medical insurance was provided to employees’ same-gender partners, making IBM one of the first companies in China to offer those benefits.

The movement of people across borders within IBM also generates those moments. Given the disparity in policies across countries, it is possible for an IBMer to have partner coverage while working in one country but to lose it when relocating. That happened to a lesbian employee in Thailand who had a female partner. Her partner was included in benefits when she worked in Australia, but not when they returned to Thailand. She pointed out this very obvious inconsistency when making the local case for extending benefits to same-gender partners. The local human resources staff agreed that was a compelling reason for changing the benefits, so IBM’s office in Thailand added coverage for same-gender partners.

One influential interviewee implied that the proactive and reactive strategies also fit together. IBM’s D&I team hears the concerns of employees and looks for ways to collaborate with them and with company leaders to implement a benefit, policy, or practice. Where there are no local employees obviously seeking the change, the corporate D&I team asks, “What are we proactively thinking about that employees never would have even dreamt that we would do?” Both dynamics suggest that the company’s commitment to LGBT+ diversity and inclusion is driving the expansion of global coverage of inclusion policies.



# Making changes in different contexts

As one leader put it, changing policies in other countries required more than “cut and pasting” from the U.S. Regardless of whether the instigation of change efforts was proactive or reactive, those efforts have often focused on contexts with legal barriers and without direct external pressure from LGBT+ organizations. Stories of change across the globe suggested that similar kinds of challenges arose in different local contexts, even when employees could point to a global IBM policy. This section explores some of those challenges and how internal advocates overcame them.

## Legal challenges

Legal concerns have clearly shaped the spread of the self-ID practice and the extension of benefits to same-gender partners. In the case of self-ID, data privacy law and employment law have been the biggest constraints in LGBT+-friendly countries.<sup>11</sup> Those laws led to IBM leaving France and Spain out of the self-ID program. IBM has also not rolled out self-ID in a number of other countries where IBM operates because of the harsh laws related to homosexuality in those countries.

Laws that criminalize same-gender relations are also sometimes thought of as legal barriers to providing benefits related to employees’ same-gender relationships. One official paraphrased the argument:

*“Well, we cannot do it because it is against the law to be gay.” Interviewees who had grappled very directly with this kind of argument on the ground reported using a similar—and effective—response to those arguments. They point out that the laws prohibit sexual acts, not the right of LGBT+ people to exist. One official’s argument is simple: “One of the things I say that shocks people: Look we are not advocating having sex in the office. We actually fire people for that. We’re not telling people to go out and break this law. ...This is what I say to lawyers, and when I put it in that perspective, they go, ‘OK, I get it.’”*

In countries where same-gender relationships are not legally recognized, providing benefits to same-gender couples was sometimes perceived as some kind of special treatment. One effective counterargument was to point out that actually same-gender couples require partner benefits because they are denied the right to marry. Benefits for partners create parity in an inequitable situation, not a special right.

## Country culture and LGBT+ issues

In LGBT+ inclusion, as with women's issues, IBM is respectful of local law and culture where it operates and is mindful of different "cultural sensitivities" (as IBMers put it) to the LGBT+ community across geographic regions. There is a recognition that change is likely to be gradual over time in countries with less LGBT+-supportive environments. While IBM's overall diversity agenda and values are consistent globally, the company must sometimes thoughtfully lay the groundwork for change in local policies and practices. As one official put it, IBM first tries to "open the door a crack with a different perspective."

Once the discussion about LGBT+ inclusion is underway, local IBM employees in positions to make decisions about company policy may be motivated by cultural norms to slow or block change (sometimes in the guise of the legal arguments mentioned earlier). Some interviewees told stories about the discomfort they observed when having these discussions with human resources officials in some locations. Cultural and other local values were sometimes used to rationalize why something should not be done.

In some situations, the obvious counterargument was that the company commitment to LGBT+ inclusion was a priority and made change an imperative within IBM's walls. One interviewee used this counterargument in response to resistance:

*"...It was not a matter of religion or opinion or background. We were doing IBM work. This is an IBM job. This is not for you to give me your opinion that you agree with equality. If you work for this company, you believe in equality. And if you are not in agreement, then you're working for the wrong company, I'm sorry."*

Perhaps the more powerful tactic, though, was to find local allies who helped to deliver the changes sought. Specific non-LGBT+ people at all levels, from local to global, were instrumental in making the big changes described by those interviewed. This tactic was especially important because LGBT+ employees were less open and participated less in the change process in less-welcoming countries. As one person noted, adding LGBT+ inclusive policies can "help employees realize it's part of our culture, part of our DNA, and hopefully encourage them to be more comfortable to come out." Getting that cycle started is part of the long-term game plan for LGBT+



inclusion at IBM, so allies are seen as playing an important role in creating an inclusive culture.

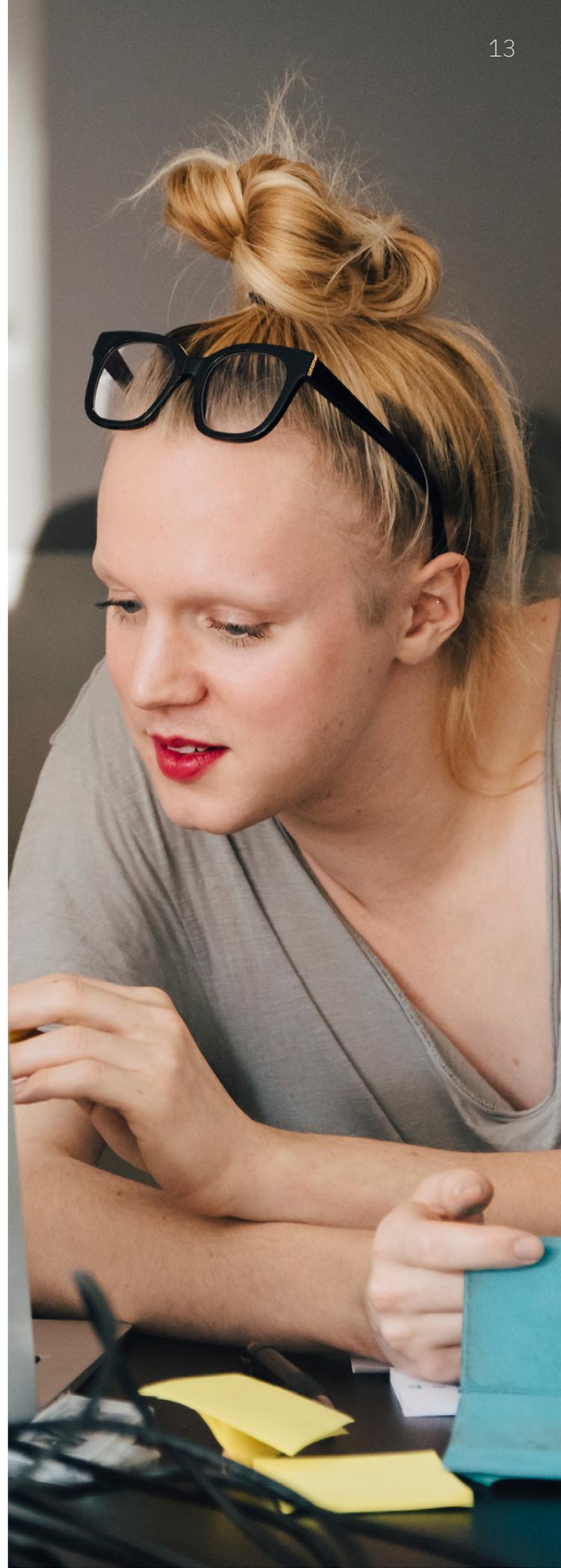
It's also important to point out that IBM's respect for local cultures and laws sometimes led to conscious adaptations of policies to local contexts. In some places, D&I officials pointed out that the cultural and legal situation might be too dangerous for LGBT+ IBMers to be offered the opportunity to self-identify or to receive benefits for a partner, at least for now. In other situations, sensitivity to local cultures meant changing policies internally but not announcing them externally. Those decisions reflect a delicate dance that sometimes disappointed employees, especially in countries thought to be more open than their legal environment might suggest.

### Local inclusive infrastructure

A very practical challenge faced by IBM in some countries concerned the availability of the insurance companies and health care providers needed to provide some of the LGBT+ inclusive benefits. A lack of "expertise" or supply of vendors can block change. In the Philippines, newly announced gender affirmation benefits had to be scaled back when it turned out that the country had no doctors who could provide the necessary services. This concern about the accessibility of some services has slowed the spread of gender affirmation benefits to IBM offices in other countries, since the company recognizes that offering a benefit creates a responsibility to make sure the employee can get it, or a "reasonable level of care" as some put it.

Similarly, providing benefits to same-gender partners in countries without legal recognition of same-gender relationships becomes problematic if no insurance company is willing to provide those benefits. In this situation, IBM's market heft can help. As one official noted about a discussion in her Asian location, "I told them the insurers will do this as long as you guys talk to them and say this is our company policy. And they said ok, and so they talked to the insurers and they were fine with it."

Another example comes from India. IBM's operations in India faced resistance from local health insurance companies that said they were unable to cover same-gender couples in the same way they would a married different-sex couple. In response, local company officials proposed a complicated work-around that would provide benefits in a very different way for an employee's same-gender partner than for an employee's spouse. But an IBM leader at the corporate level did not like the idea of treating



same-gender partners as an “exception.” She deployed IBM’s size in the local insurance market to successfully persuade an insurance company to provide coverage for same-gender partners, again becoming one of the first companies in India to provide such benefits.

Overall, a country’s laws, culture, and health infrastructure shape IBM’s implementation of its commitment to LGBT+ inclusion. One or more of those factors can be barriers to action in the short run, but the company has deployed new arguments, committed allies, and market power to expand LGBT+ inclusive policies and practices. Those strategies have contributed to change both internally with local officials and externally with vendors.



# Future extensions

One obvious direction for future change would be an expansion of LGBT+ inclusive policies to more countries. The company has an implementation pipeline, and officials mentioned plans for gender affirmation benefits and self-ID, in particular. Countries that expand rights for same-gender couples are seen as ripe for the addition of benefits for same-gender partners.

Next steps for transgender and non-binary IBMers are also part of the frontier of change. In 2019, IBM rolled out a program in countries with LGBT+ self-ID allowing employees to post their pronouns in the global directory of employees, and pronoun options expanded in 2021 to include multiple pronouns like they/she. Restrooms are also on the agenda, and IBM encourages employees to use the restroom they most closely identify with where possible. As part of being fully inclusive, the company is continuing work to provide all gender restrooms wherever possible.

Future efforts to expand inclusion in more places will also be encouraged and perhaps accelerated by a reinforcing cycle of openness and inclusion. As inclusive policies spread to new places, IBM D&I leaders hope that LGBT+ employees will be more comfortable with being out and with asking for more change to meet their needs. For those who are not out at work, a separate Slack workspace provides a way to connect with other LGBT+ employees and D&I officials, while maintaining anonymity. That Slack workspace has been an important communications tool to ensure communication and information access for all LGBT+ employees, whether out or not. According to one official, other companies have asked about this use of Slack, suggesting that this is another example of IBM's technological leadership.

Feedback from the grassroots holds the company accountable, according to one leader. LGBT+ employees are quick to notice unintentional missteps and to communicate with D&I officials. The officials in turn, can use the Slack channel and other communication methods to respond to an employee or to show a problem has been fixed.

# Conclusions and lessons for other employers

IBM's approach to LGBT+ inclusion is both global and deep. Although specific policies and practices provide distinct markers of IBM's promotion of LGBT+ inclusion, the whole of IBM's commitment is far greater than the sum of its parts. At the same time, the company's approach to implementation on the ground is local and pragmatic. Each introduction of a new program or benefit for LGBT+ employees means the company must think through laws, norms, and employee needs in many different cultural and legal environments. Committed leaders, willing allies, and outspoken LGBT+ employees have then brought that promise of LGBT+ inclusion to life on the ground. IBM's experience also shows the importance of technological leadership and developing new strategies to expand LGBT+ inclusion.

Stepping back, we can almost see a broader pattern that seems to fit into Sylvia Hewlett and Kenji Yoshino's analysis of multinational companies and LGBT+ inclusion practices. They note that companies must adapt when operating in countries that fall along the spectrum of inclusion from LGBT-friendly to LGBT-hostile.<sup>12</sup> Hewlett and Yoshino found that multinational companies have different strategies for addressing LGBT+ inclusion across that spectrum. The "When in Rome" strategy involves making exceptions to a company's global policies to conform to local laws. The "Embassy" model involves creating local workplaces that reflect the company's own LGBT+ inclusive policies and practices, regardless of the external constraints.<sup>13</sup> Notably, Hewlett and Yoshino use IBM as an example for both strategies, foreshadowing the nuanced patterns found in this paper. However, some IBM officials interviewed describe the company as having a "hybrid" strategy, implementing LGBT+ inclusion practices wherever allowed by external constraints and internal opportunities. IBM is a company simultaneously pursuing more than one strategy in the Hewlett and Yoshino framework.

Other employers can also benefit from IBM's experience. IBM leaders share their knowledge about practices and about strategies for change with other companies through participation on panels at conferences on inclusion, for example, and through less formal conversations. IBM offers concrete ideas to other companies for implementing cutting edge practices, like self-ID, a secure private forum for LGBT+ employees, or online training courses. Companies can avoid reinventing the wheel by drawing on those resources.

In addition, IBM's experiences point to elements of a broader strategy for expanding inclusion globally that are potentially relevant for other firms: Having a global policy serves as an important tool for motivating and discussing change at local levels and for overcoming resistance based on non-business rationales. Policies also inspire leaders to be proactive and to take on challenging situations that need change.

While laws criminalizing same-gender relations appear to be practical barriers to making practices more inclusive, companies may find greater room than is first apparent. A closer analysis of such laws and how they are applied can reveal space for implementing inclusive policies internally in ways that are safe for LGBT+ employees.

Developing lines of communication between LGBT+ employees and corporate leaders is crucial for revealing employee needs. Effective communication can come from informal channels, like meetings with LGBT+ employees, or through more formal chains of command, such as employees working through local human resources officers. Technology can also help to bridge gaps between less open LGBT+ communities and corporate leaders.

Where LGBT+ employees are reluctant to be open and to lobby directly for more inclusive policies, allies' voices can be effective in reducing local resistance and enabling new policies to be implemented. Both the policies and the visible presence of allies may help create a more supportive environment for LGBT+ employees who can then be more open.

For some internal changes to policy and practice, finding local expertise in health care is also likely to be important for making health benefits most LGBT+ inclusive.



# End Notes

- <sup>1</sup> As discussed in our first report on IBM, the company began using “LGBT+” in 2016 as an umbrella term for lesbian, gay, bisexual, transgender, and other categories of sexual and gender minorities, including people identifying as intersex, gender fluid, or asexual, for example. M. V. Lee Badgett, “Collecting LGBT+ Data for Diversity: Initiating Self-ID at IBM,” Center for Employment Equity, University of Massachusetts Amherst, 2020. <https://www.umass.edu/employmentequity/sites/default/files/IBM%E2%80%99s%20LGBT%2B%20Self-ID%20Practice.pdf>
- <sup>2</sup> Company records and IBM LGBT+ Timeline, <https://www.ibm.com/thought-leadership/LGBT%2Bpride/>.
- <sup>3</sup> Employee count: IBM 2019 Annual Report, p. 33 and 64. “Roughly 100” from interview data.
- <sup>4</sup> David A. Thomas, “Diversity as Strategy,” Harvard Business Review, September 2004. See also Badgett, “Collecting LGBT+ Data for Diversity,” in footnote 1.
- <sup>5</sup> Human Rights Campaign Foundation, 2020 p. 22.
- <sup>6</sup> BRGs also exist for IBMers who are Asian, Black, men, women, or veterans, for example.
- <sup>7</sup> Kimberley Messer, “How an IBM Business Development Team Has Helped the LGBT+ Community for Nearly 20 Years,” Business Insider, 7/3/19, <https://www.businessinsider.com/sc/ibm-partner-global-lgbt-community-2019-7>.
- <sup>8</sup> Human Rights Campaign Foundation, Corporate Equality Index 2020, Washington DC, 2020, p. 9.
- <sup>9</sup> Beck Bailey and Liz Cooper, “Supporting the Journey Gender Transition in the Global Workplace: A Best Practices Study Based on IBM’s Comprehensive Approach,” Human Rights Campaign and IBM, 2019, [https://www.ibm.com/employment/inclusion/downloads/IBM\\_Gender\\_Transition\\_in\\_the\\_global\\_workplace.pdf](https://www.ibm.com/employment/inclusion/downloads/IBM_Gender_Transition_in_the_global_workplace.pdf).
- <sup>10</sup> For more information, see note 1, Badgett, “Collecting LGBT+ Data for Diversity,” 2020.
- <sup>11</sup> See Badgett, “Collecting LGBT+ Data for Diversity: Initiating Self-ID at IBM.”
- <sup>12</sup> These groupings come from Sylvian Ann Hewlett and Kenji Yoshino, *Out in the World : Securing LGBT Rights in the Global Marketplace*, Center for Talent Innovation, 2016.
- <sup>13</sup> Hewlett and Yoshino also offer a third model for multinational companies: the “Advocate”, where the company also works to change LGBT+ related laws and social acceptance either directly through lobbying or through support for local LGBT+ activists or other social change efforts. IBM’s public engagement in the United States and other countries has addressed some specific legal or social change efforts, but this report focuses only on internal changes. The third report in this series will address IBM’s efforts in support of external change that better address whether IBM has taken on the Advocate role described by Hewlett and Yoshino.

# Methods

This report drew on several sources of information about IBM's LGBT+ inclusion policies globally. The author worked with **Kimberley Messer**, Business Development Leader, North America, Workforce Diversity & LGBT+ Markets, to gather the relevant data. Data came primarily from interviews with current and former IBM employees who have been instrumental in the development and implementation of LGBT+ inclusion programs at IBM:

**Joy Dettorre,**

Office of Diversity and Inclusion,  
Global Leader;

**Ella Slade,**

Global LGBT+ Leader,

**Tony Tenicela,**

Global Leader, Global Diversity  
Business Development,

**Marijn Pijnenburg,**

EMEA Leader, Global Diversity  
Business Development,

**Jen Estes,**

ASEAN Services Lead Counsel

**Sofia Bonnet Hollis**

(former IBM Diversity Leader),

**Jun Chen,**

Patent Leader and BRG Leader China.

Other information came from internal company documents made available by IBM. In addition, other externally available and independent publications that provided context and details are included and cited in the report. Thanks go to **Don Tomaskovic-Devey and Terri Stein**, IBM Legal for comments on earlier drafts and to **Adrienne Núñez**, who provided very helpful research assistance.



The Center for Employment Equity is dedicated to documenting progress, and when necessary regress, toward our shared national goals of equitable and diverse workplaces. We provide scientifically careful analyses and curated data to the community of citizens, employers, and policy makers concerned with promoting equitable workplaces.