



Welcome to the Future of Global Mobility

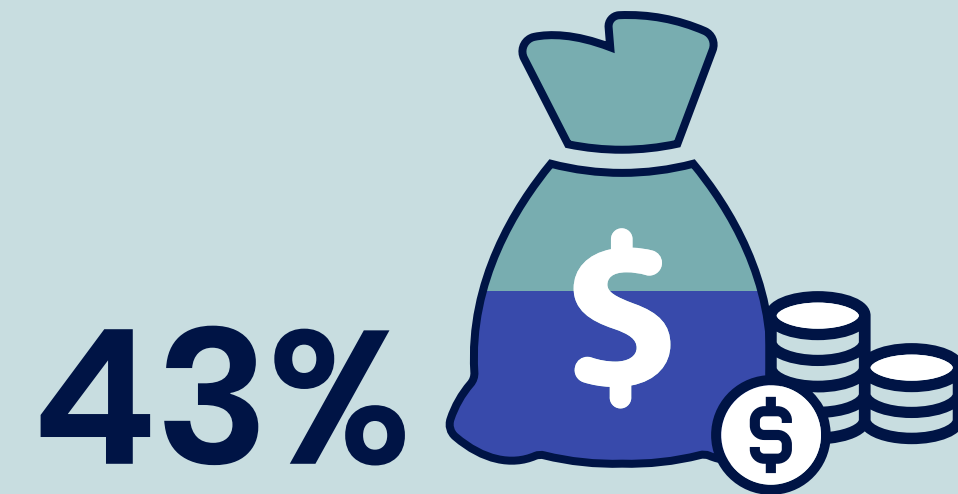
The Digital Journey

In partnership with

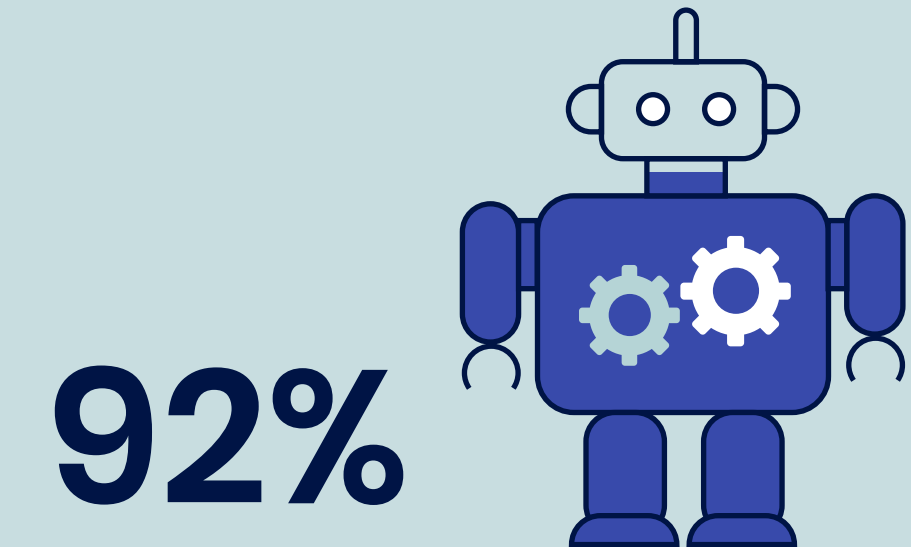




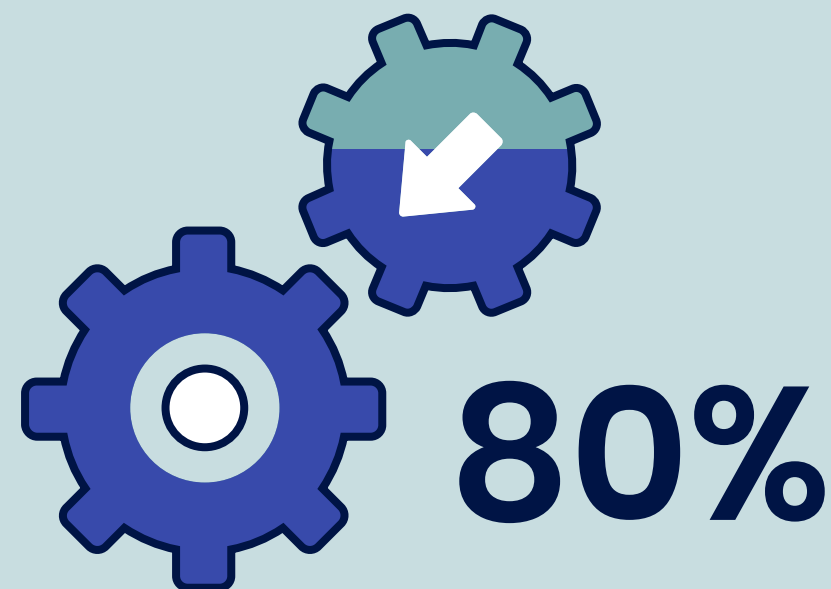
of GM & HR leaders are still using Excel to manage their programs



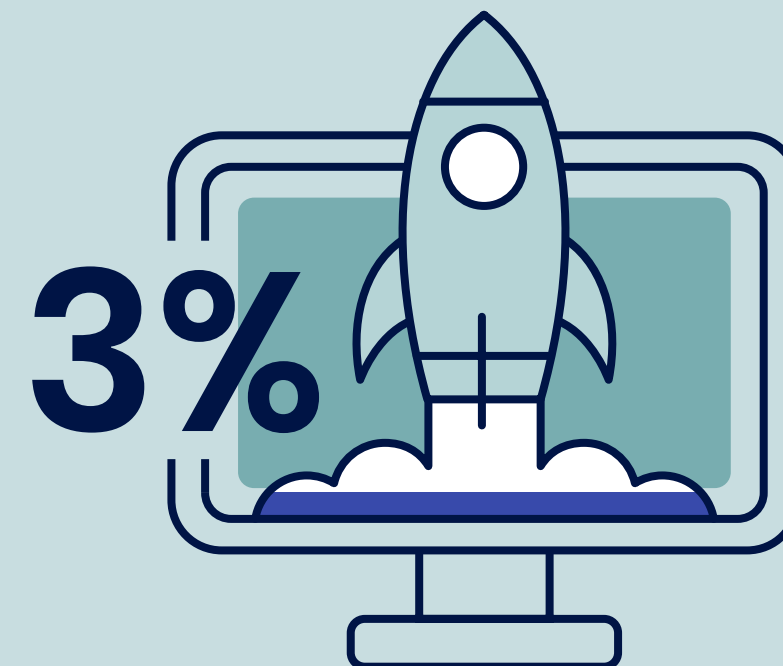
stated that the cost is the main barrier to implementing technology



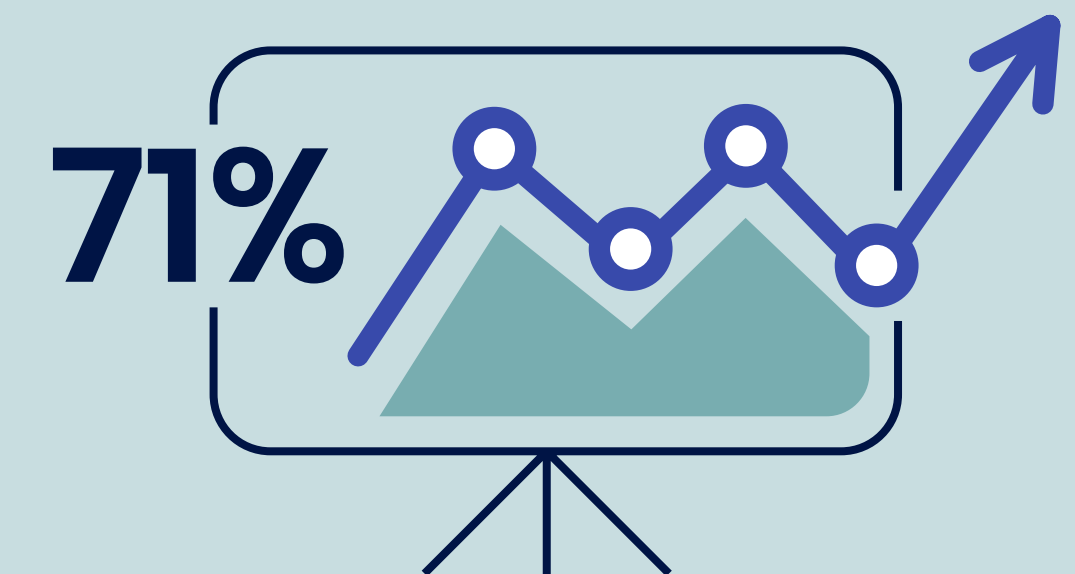
of GM & HR leaders stated that automation of processes was their number one priority



Over 80% of respondents found downstream integration with partners either important or critical



AI or VR is yet to take-off with only 3% of respondents utilizing these types of technologies



A total of 71% of respondents valued the cost vs actuals side of predictive analytics

Global Mobility is increasingly being recognized within organizations as a vital enabler to international growth. In an era of digital transformation, the need for insight-driven data to support workforce planning is becoming more critical than ever. Global Mobility must challenge the status quo and embrace digitalization as a means to deliver a more valuable and flexible offering to its customers.

Businesses looking to expand and thrive internationally face a myriad of challenges, most notably as they negotiate today's global economy and adapt to unforeseen disruptive forces.

Earlier this year, as the COVID-19 pandemic was taking hold around the world, we conducted a survey to understand the extent to which technology is currently being used by the Global Mobility function, the value of that technology, the areas where it has most impact and the extent to which it is connected with other internal and external systems.

The results suggest that Global Mobility (GM) is still relatively new to the digital journey. While large programs have embraced technology as an enabler, many organizations are yet to introduce technology tools to optimize performance of the GM function. Regardless of size, advanced technology solutions like Artificial Intelligence and Virtual Reality are not widely used. GM functions

need to better articulate to the business how these solutions could be utilized and benefit mobility operations.

In our report, we explore how GM functions are transforming through the use of technology to meet modern business needs, support employees more effectively and ensure compliance. We look at technology platforms, automation and process efficiencies, integration with other systems, and new technologies such as Artificial Intelligence and Virtual Reality. We leverage the results of our survey to reveal how organizations are progressing on their digital journeys, provide you with insights into the latest trends in GM technology and give you the opportunity to see how your organization compares.

We would like to thank everyone who took part in the survey, as well as Equus Software for their support and expert contribution to the survey and to this report.



The COVID-19 Impact

The COVID-19 pandemic has seen increased interest in technology as organizations struggled to locate their mobile employees. Many discovered, not only that they didn't know where all their mobile employees were, but also that they had employees working in locations that they were unaware of. For many organizations this took a considerable amount of time and resources using manual processes due to a lack of technology. Across the globe, hastily introduced national lockdowns meant business travelers were stranded and families separated. Without technology tools in place, organizations were exposed to significant risks relating to compliance and the safety and security of their employees and families.

Due to the imposition of lockdowns worldwide, organizations have had to rapidly adapt to ensure that employees can be supported with alternative work arrangements, such as remote working. Employees have been displaced due to immigration and border closure issues, travel restrictions, and personal health and safety concerns. Tax and immigration compliance have also become key issues as nations continue to announce various changes during the pandemic. Managing and supporting compliance without the right tools in place has been a massive challenge for the GM function.

At the same time, the financial impact of COVID-19 is starting to be felt and many organizations have already announced significant cuts to their workforce. Further cuts are likely in the months ahead as furlough protections start to expire. Significant uncertainty remains around plans to restart business and the fear of a second wave of infections. Cost containment measures and further workforce reductions are likely.

While some organizations will thrive in the post-COVID-19 business environment, others will likely contract. The need for technology is paramount, for the GM function that will be at the forefront of navigating and communicating with the business about the impact of COVID-19. However, the challenge of obtaining business approval to invest in technology is magnified and the ability to formulate a powerful business case to support this remains key. The GM function needs to partner with service providers to create a strong business case that focuses on the benefits of digitalization: greater efficiencies, compliance and risk management, improved cost control, data analytics and a customer centric model.

“Given that the COVID-19 pandemic will move cost to the forefront of the C-Suite's thoughts, tools that enable GM leads to easily articulate and justify international moves, both formal and informal, will be critical.

Survey Demographics

Just over half of the participants in our survey come from North America (54%) with the majority of the rest being from Europe (41%). The remainder are from Asia (4%) and the Middle East (1%). Participants represent organizations from a wide range of industries as shown in Chart 1.

The lower representation from Asia is broadly reflective of the lack of mature global mobility programs for Asia Pacific headquartered organizations. Unsurprisingly, the Tech sector, Oil & Gas, Manufacturing and Professional services organizations are highly represented as they typically have a greater need for mobility programs compared with sectors such as Leisure, Construction or Education.

Participating organizations have employees in all the main mobility categories: long-term, short-term, permanent transfers and commuting, with the majority reporting up to 250 mobile employees in each category as indicated in Chart 2. A relatively small number of organizations had populations in each category that were larger than 250 mobile employees.

CHART 1. Business sector of survey participants

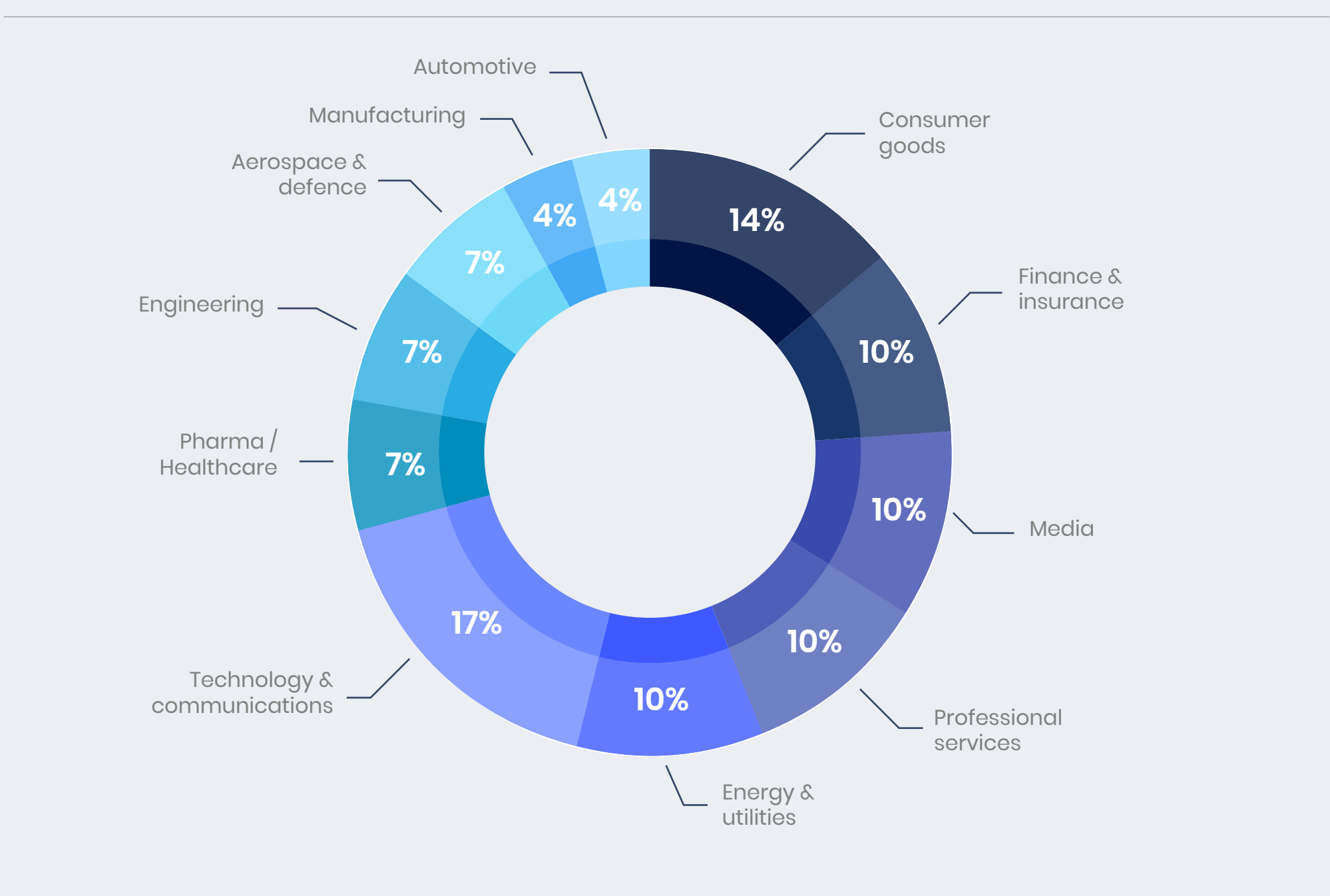
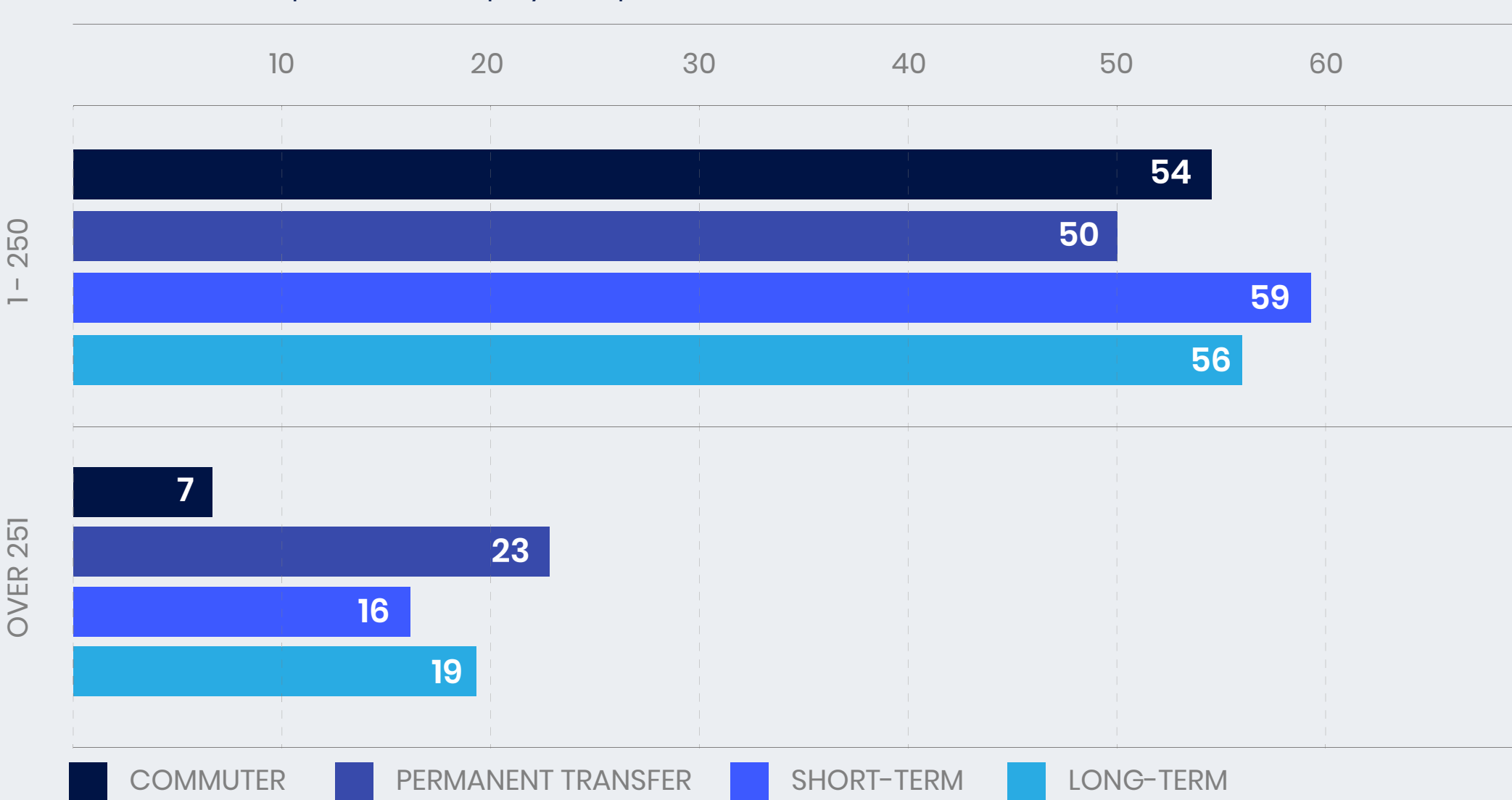


CHART 2. Make up of Mobile Employee Population



Uptake of Technology Platforms

GM has so far lagged behind other areas of HR in leveraging technology and Microsoft Excel remains the primary tool for most organizations to manage their programs. However, we are seeing more interest and motivations toward the utilization of GM technology.

Nonetheless, demand for improved return on investment has led organizations to examine how they might streamline their mobility operations by introducing technology solutions. Investing in such solutions is widely seen as the best way to increase performance and free up time to focus on strategic added-value services, such as workforce planning, predictive analytics and program cost data.

“We generate a lot of data but without the right tool to capture and analyze this data we are not getting sufficient value out of institutional know how.”



Welcome to the Future of Global Mobility

The Digital Journey

It is evident from the survey data that the uptake of assignment management technology has been relatively low in GM, with just 42% of participating organizations using such a system to manage their programs. Predictably, organizations with more than 500 long-term international assignees were more likely to have a system.

The survey also revealed that 36% of all participating organizations continue to use Excel to manage their programs. Organizations with smaller overall employee populations and mobile employee populations were most likely to take this approach.

Of the 42% who use a GM technology platform, three-quarters reported that they are satisfied that it supports them as intended, with almost all of the balance saying that the platform partially supports them and some in this group looking to increase the technology's functionality to accommodate different types of mobility.

There are currently a variety of GM platforms available. Our survey results show that after Excel, AssignmentPro is the next most widely used (20%), followed by tools provided by relocation providers (17%) and other options (14%) which includes a combination of generic software, HRIS software and personal moving apps. The balance use tools from KPMG (7%) and Topia (1%) with 5% having a custom-built, in-house platform.

Asked to select the biggest barriers to investing in technology, cost implications (43%) was the most frequently chosen item, perhaps because organizations are reluctant to allocate investment to better manage their mobile populations when these employees represent such a small proportion of the workforce, typically 1%. The time and resources involved in implementation (33%) (e.g. updating policies and processes) was next, with lack of knowledge of the options in the market (6%) chosen by organizations with smaller assignee populations.

CHART 3. Primary tool used to manage GM program

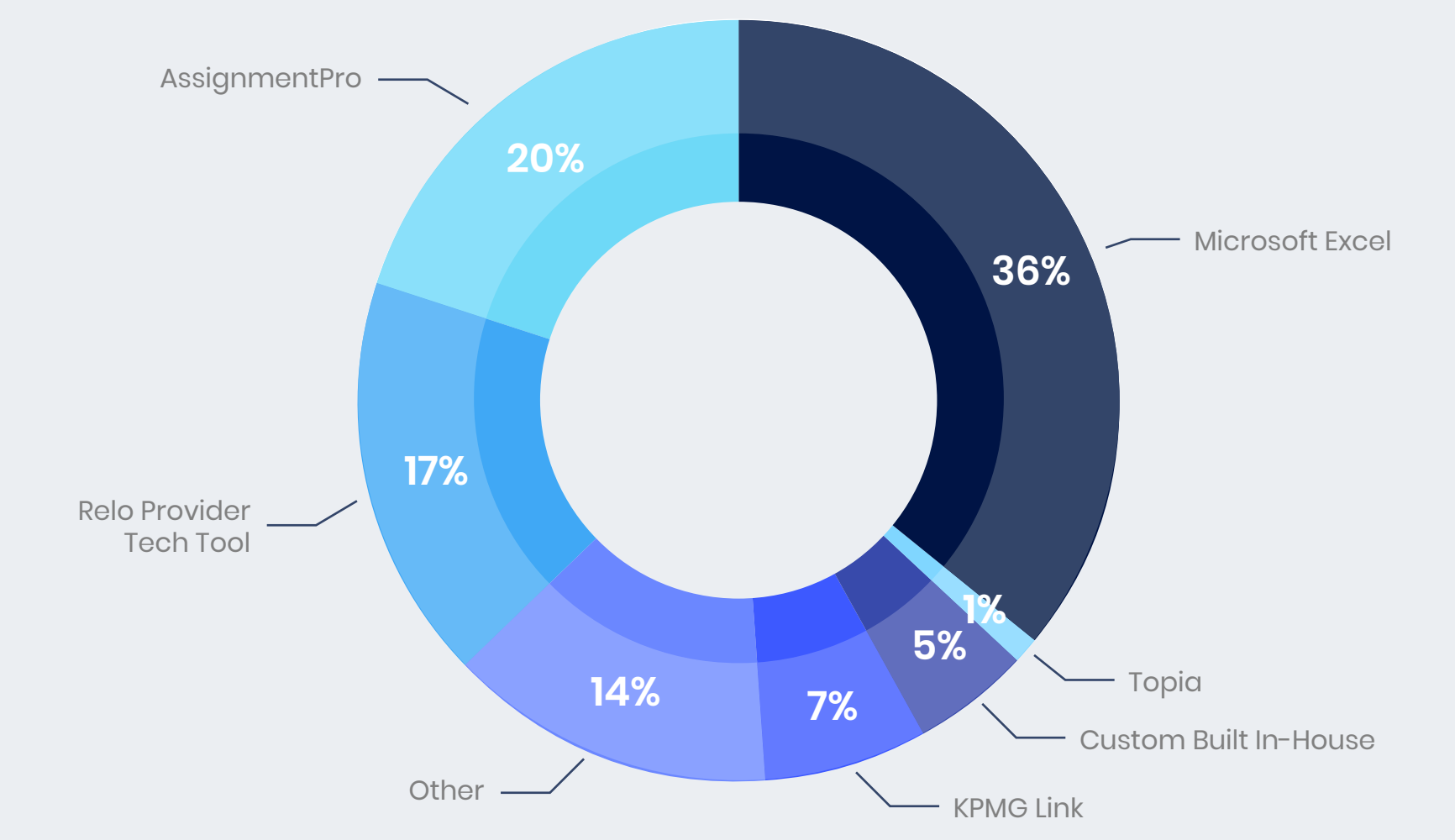


CHART 4. What are the barriers to implementing a solution?

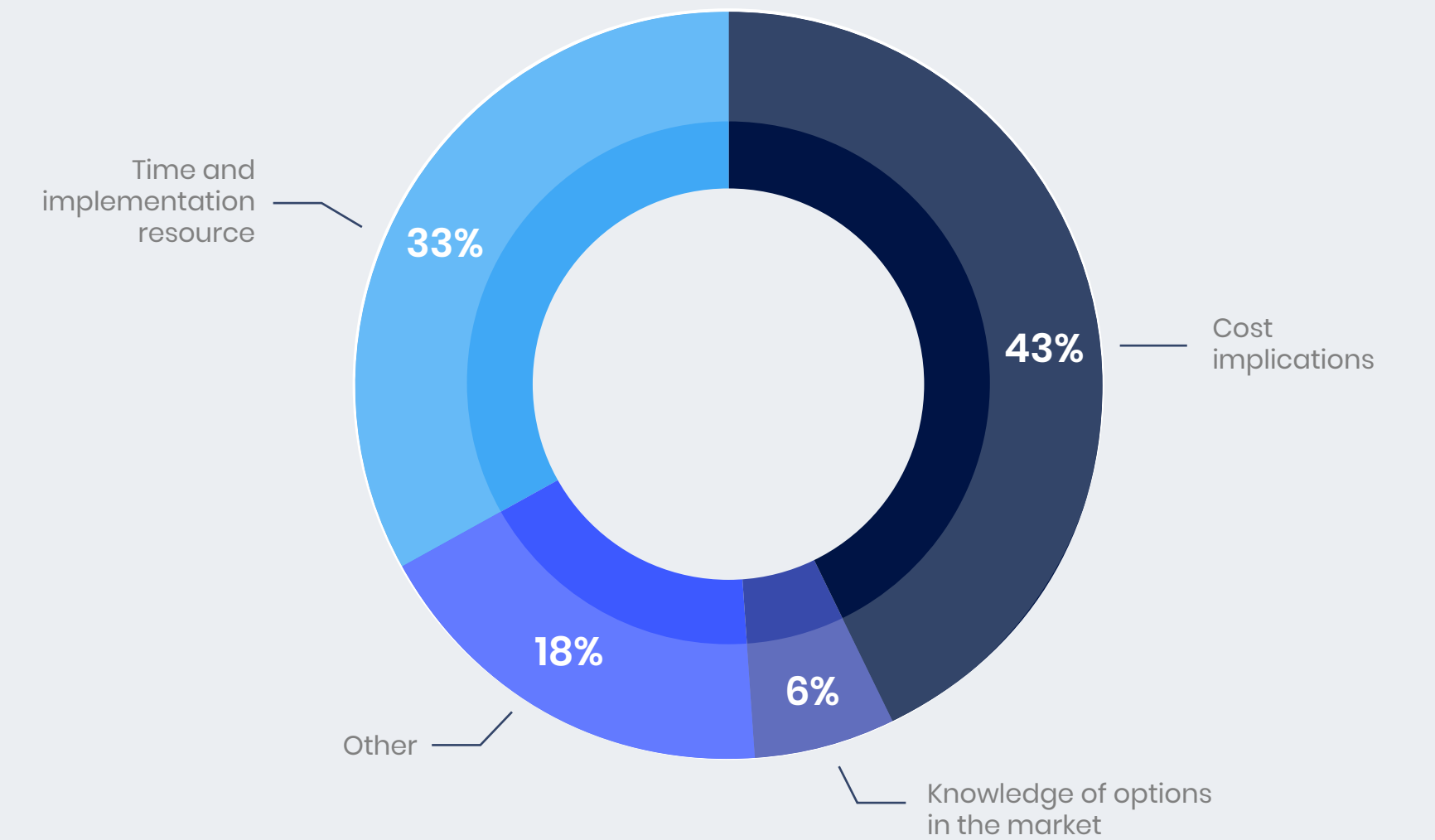
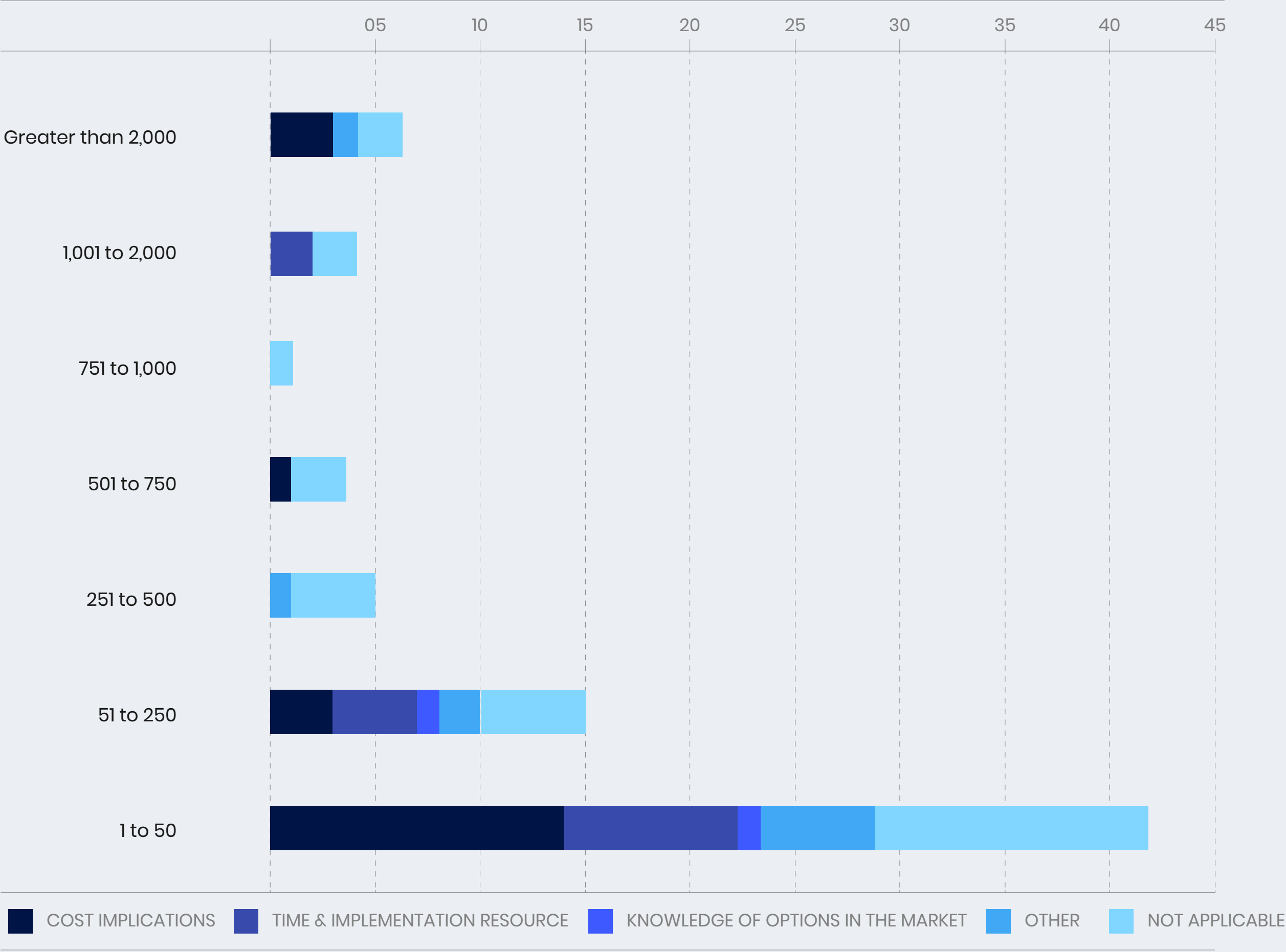


CHART 5. Barriers to implementing technology by assignee population

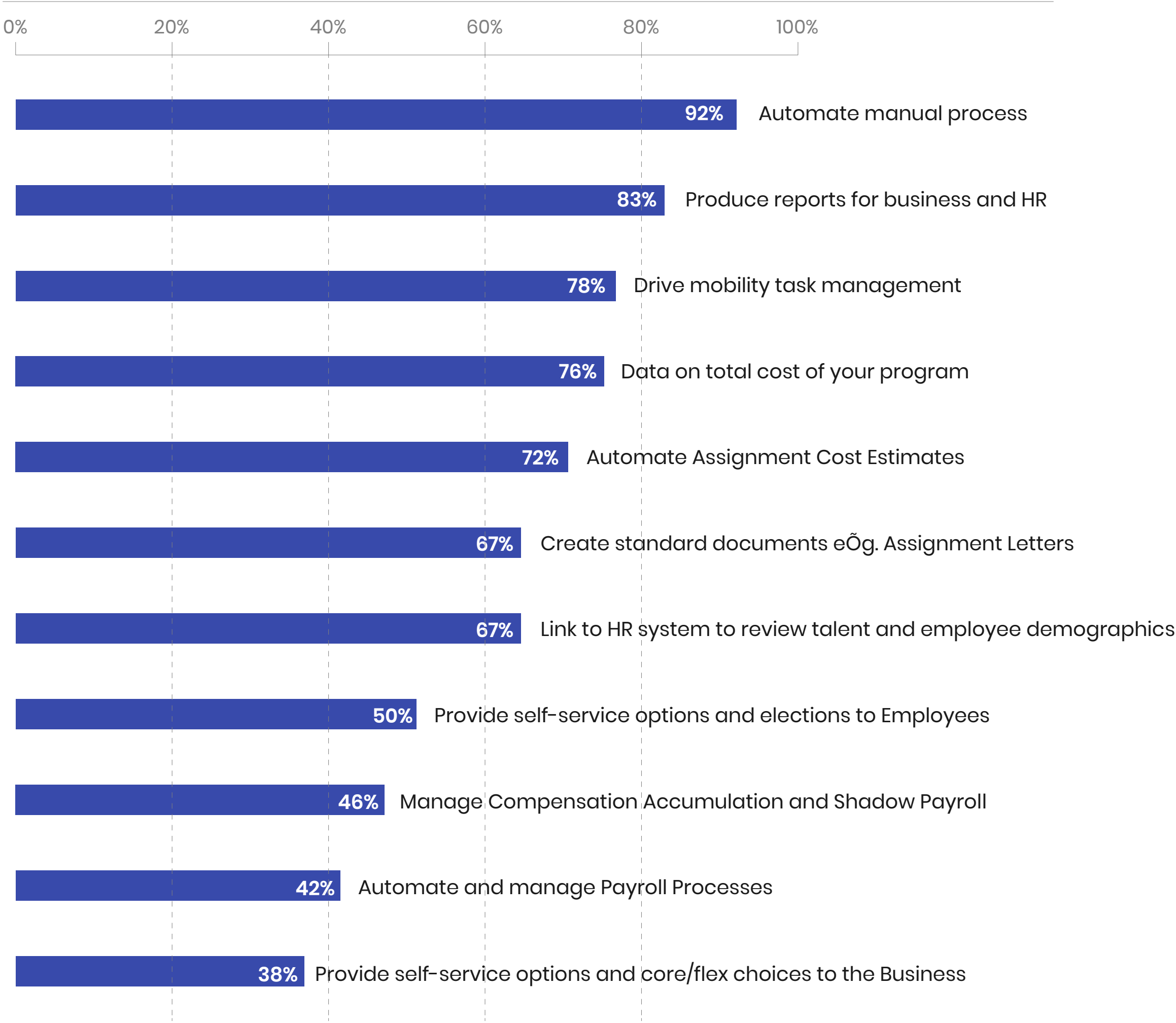


Introducing the right data management approach, underpinned by good technology, will enable a bigger-picture view and generate valuable business insights that will in turn help shape GM strategy and show where cost efficiencies can be made.

GM functions have typically hired specialists with excellent people management skills, but the new technology will demand greater technical know-how and skills too. In order to move from an operational to a strategic focus and keep up with the pace of digital transformation, GM leaders must embrace digitalization, upgrade the skills of their teams and consider hiring specialized technical resources to fully leverage the opportunities that technology platforms offer.

What is encouraging is that two thirds of those organizations currently without a GM technology platform say they are considering investing in one within the next two years, with half of those saying they want to do this within 12 months.

CHART 6. How important is the following functionality within a GM technology platform?



The Value of Technology Solutions

We asked survey respondents to tell us what they most valued about technology solutions for GM, not surprisingly the automation of manual processes topped the list at 92%. The ability to produce reports to speed up and improve internal processes was also seen as important by 83%. Another key finding was the importance of transparency on the total cost of the programme, stated 76% of respondents.

Process efficiencies (92%), reporting (83%), task management (78%), cost data (76%) and automation of calculations (72%) and templates (67%) were noted as the most important benefits to them. Alongside these advantages, integration with the organization’s wider technology solutions (67%) and providing self-service options to employees (50%) were also highly regarded.

“Our business is focused on automation and user experience – we need to ensure our mobility program replicates that for our employees, using technology at every opportunity.”

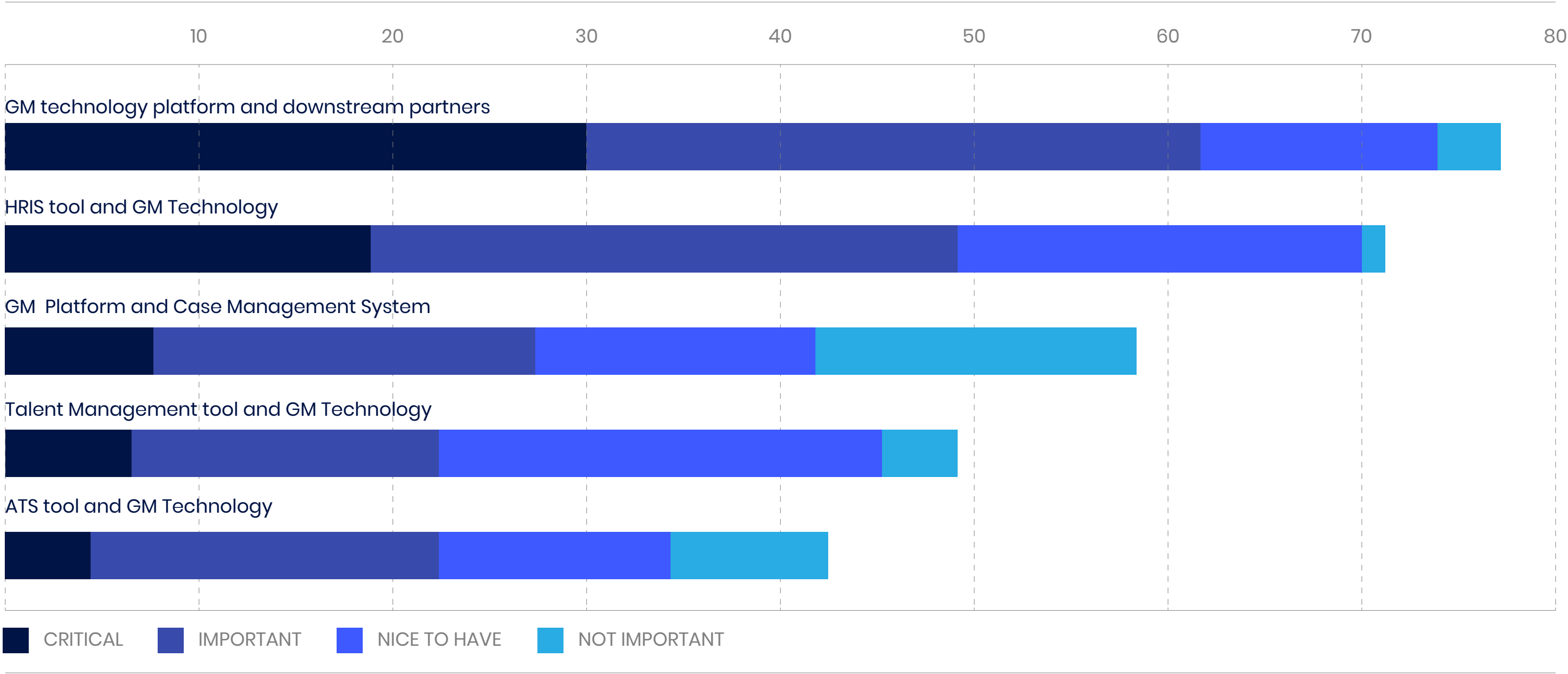
The Value of Integration

There are organizations who have successfully integrated internal and external processes into a wider ecosystem, however, according to our survey, and as shown in Chart 7, the majority of respondents see the importance of integration between GM and the organization’s downstream partners and their Human Resources Information Systems (HRIS) but are yet to reach that level of maturity.

Integration with Talent Management, Case Management tools and Applicant Tracking Systems that support recruitment are also valued, but to a lesser extent, as GM are not typically involved in recruitment and the overall talent management program.

In addition, there is a greater awareness of the concept of ecosystems, and some organizations are

CHART 7. How important is it for the following systems to be integrated?



considering how they might better connect their separate systems to operate through a single sign-on.

For now, the major HRIS providers, for example, Workday, SAP and Oracle, do not offer GM modules, so there is a need to link systems via APIs. While this should be a simple process, it can be both expensive and time consuming. Clearly, GM leaders will need to work closely with their

Human Resources IT functions to connect the GM platform to other HR technology tools. Without a single source of data across the organization, there is a risk of data being generated via multiple systems which leads to data errors and duplication. This presents an opportunity for GM platform vendors to provide a fully integrated, single source of truth technology to meet this need.

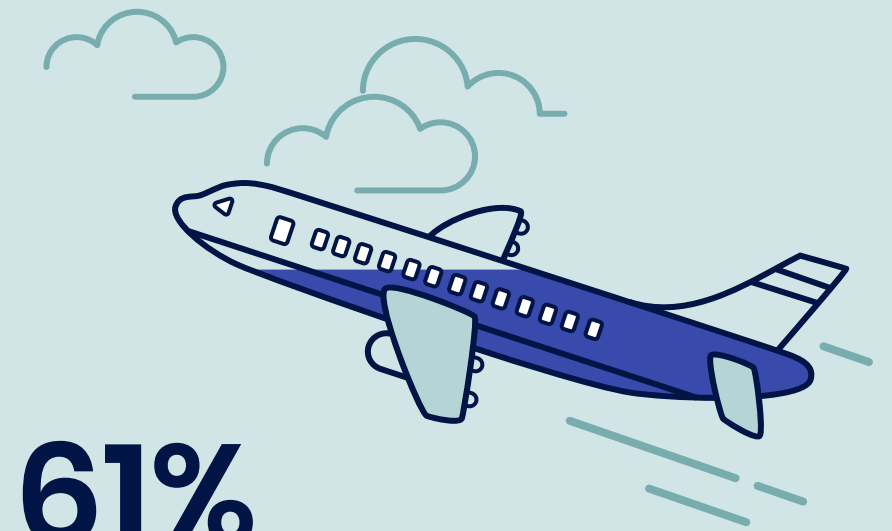
Cognitive Technologies

With this relatively low adoption of GM technology, cognitive technologies such as Artificial Intelligence and Virtual Reality are further down the journey for GM. However, there is significant interest in its potential, especially in regard to predictive analytics and the ability to assess actual costs versus predicted costs, and thus better manage accruals.

Chatbots are used by just 3% of our survey participants, but another 15% are looking at them as an option going forward. Their potential to address simple assignee requests may appeal to GM leaders looking to reduce the administrative workload of their teams.

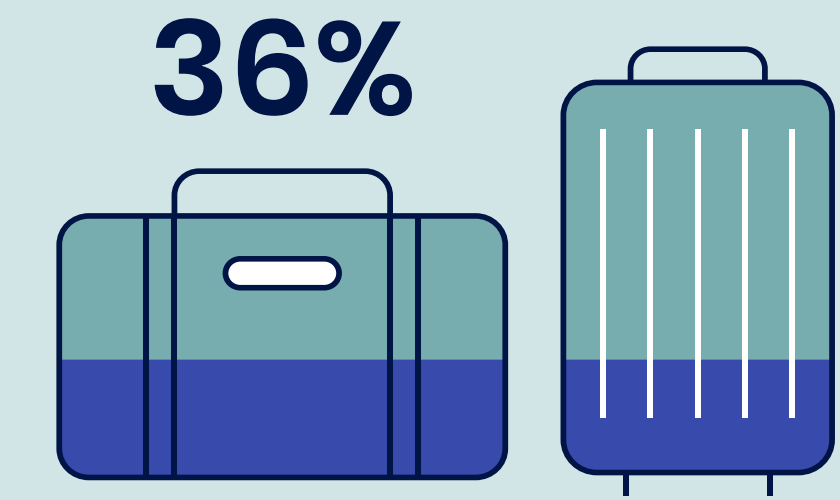
Relocation vendors are leading the way in GM with VR, utilizing video communications to conduct shipping surveys, show assignees round potential homes in their assignment destinations and provide orientation tours. The appeal of this kind of functionality is likely to increase as organizations adapt to living with COVID-19.

Mobile apps linked to an organization's GM platform will increasingly become the interface between mobile employees and the GM team, offering a range of efficiencies: mobile employees will have access to information relating to their mobility at any time without the need to contact the GM team, compliance can be better managed and GM teams will be able to focus on higher value-adding tasks, including supporting mobile employees in person when necessary.



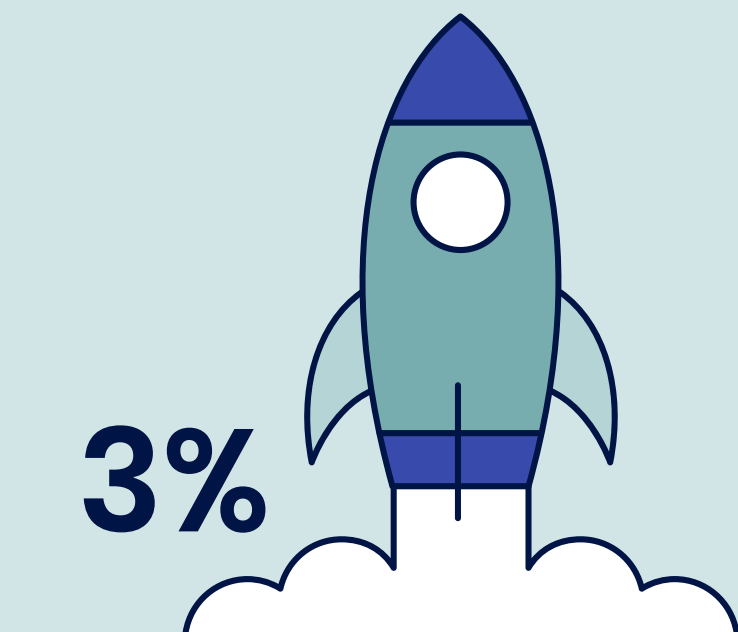
61%

of respondents are getting started with process automation and tracking



36%

of respondents have not yet started their digital journey



3%

of Global Mobility and HR leaders are on the next phase of their journey and utilizing AI + VR

Cost Considerations for GM Leaders

While automation has the potential to deliver huge improvements, GM leaders need to choose their systems with care.

Many of our survey participants, particularly those with smaller assignee populations, said the biggest barrier to purchasing a system was cost. While scale is less of an issue as technology platforms become easier to introduce, organizations in this position might also consider using one of the alternative options available in the market:

Systems offered by assignment management, relocation management, tax and other providers.

Simpler, cheaper more flexible platforms, that are being developed to support GM market.

Single function apps that focus on specific aspects of the mobility life cycle, e.g. shipping, relocation, tax, immigration, etc.

Parting Thoughts

“Technology would free up resources in a tight cost situation and enable GM to change focus from operational to strategic tasks. Thus, it would change GM’s contribution to the organization and provide options to better connect mobility to leadership and talent development.”

Clearly, at every stage of the mobility lifecycle, opportunities abound for technology to drive enhancements that will lead to cost reductions and streamline the GM program. Manual tasks previously performed by the GM team will be managed through technology and AI, providing a more efficient service to organizations and their employees.

However, organizations across the globe are grappling with the crippling effects of their businesses being shut down or significantly downsized for many months. Budgets will be even tighter, and, in many cases, headcounts will be reduced with knock-on implications for mobile employees and the GM functions that support them.

While there are many ways to harness technology to deliver mobility programs that are fit for these challenging times, GM leaders would benefit from learning and sharing best practices and ideas within the GM community. In any case they need to really step up to the challenge to innovate and embrace the technology platforms that are available to improve their GM programs and strategic position in the organization.



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Technology Partner Insights

Mobility programs are at a tipping point. Employees expect connected, user-friendly apps to manage business travel and international moves, while organizations require up-to-date information about the whereabouts and status of their global workforce. The need for secure communications, meanwhile, is greater than ever, and many global mobility teams continue to be overwhelmed with time-consuming, manual processes that eat up hours of their working days.

The COVID-19 pandemic has only intensified these trends and created volatility in both business and political environments. While some companies are thriving, others are struggling – whatever the scenario, all companies are have limited visibility into how they'll fare over the coming months and years. This means an increased focus on cost and, for many, a reluctance to invest in new technology. But, while it may be difficult to build a business case to invest in mobility technology, doing so is a great opportunity.

This survey provides the most comprehensive look into the use of technology in the global mobility industry and identifies the major trends and challenges in the digitalization journey.

While the findings show that many organizations are still working off Excel and manual processes, it uncovers the need for mobility to digitize and optimize their program so they can better support the business and its mobile workforce.

Now is the time for global mobility leaders to rise to the challenge of enabling innovation and embracing the technologies that will make their programs agile and responsive during times of crisis. By tackling the basics first, mobility teams can automate repetitive tasks and create efficient processes to free up resources in cost-conscious times and allow programs to shift from operational to strategic. Technology also enables businesses to maintain awareness of the local situation for each global worker and fulfil their duty of care by ensuring the safety and security of employees and their families.

In the midst of this upheaval, global mobility is changing from a reactive function reliant on manual tasks to an automated, streamlined program that provides insight back to the business.

Five key areas are driving this transformation:

- 1 Real-time data**
Know the whereabouts and status of your global workforce at any given moment
- 2 Ecosystem integration**
Direct, efficient communication with suppliers and vendors
- 3 Analytics-driven decision-making**
AI tools enable predictive capabilities for future needs and trends
- 4 Self-service tools and portals**
Provide employees with the convenience and ease of use they desire
- 5 Automation**
Eliminate manual and repetitive tasks that impact worker productivity

Homegrown workarounds, manual processes, reliance on Excel and siloed reporting will soon be things of the past. Instead, global mobility will develop into an efficient, data-driven and strategic function that will prove essential to everyone it touches. Through this research, it's evident, there is no time to waste in adopting the technologies that will bring about this change.



The Global Mobility Executive team would like to extend our gratitude to those who completed our survey, enabling us to produce this report.

We would also like to extend a special thanks to our key contributors:

The team at Equus Software

Alex Felstead, *Co-Founder, Global Mobility Executive*

Shaun Griggs, *Co-Founder, Global Mobility Executive*

Siobhan Cummins, *Global Mobility Executive, Advisory Board*

Fiona Dawson, *Global Mobility Consultant*

Renata Mikalauskaite, *Global Mobility Executive, Graphic Design*

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The Digital Journey

| Appendix

Key Findings

About the program	The majority of respondents' headquarters are located in North America or Europe, with around two-thirds operating with over 10,000 employees. The organisations surveyed operate in 17 different sectors, with around one-quarter managing more than 2,000 business travellers.	
Technology	There are several global mobility platforms available, with AssignmentPro the most widely used. Most organisations surveyed do not own a global mobility platform, but the majority who do are satisfied it supports them as intended. Cost implications and time and implementation resource are the main barriers to implementing a GM platform.	
Automation	Automation is pivotal and remains at the forefront of decision making when valuing a GM platform. The key takeaway from automation is the demand for automation in report writing, management, cost information and to help reduce the time spent on manual processes.	
Integration	Around three-quarters found a Human Resources Information System at least important to be integrated within GM, one-third for a Case Management tool, and one-quarter for Applicant Tracking System or Talent Management tool. However, it is clear that these functions do not currently play an integrated role for a large number of organisations.	
Digitalisation	Artificial Intelligence or Virtual Reality is yet to take-off within global mobility. However, around half of respondents are interested for their program. Predictive analytics would be most highly valued where looking at cost versus actuals to help accruals.	
Parting thoughts	Given the current situation of the global pandemic, challenges surrounding global mobility will be at the forefront for many people involved in the sector. Process efficiency, analytics and automation and the most valued aspects of global mobility technology.	

Agenda

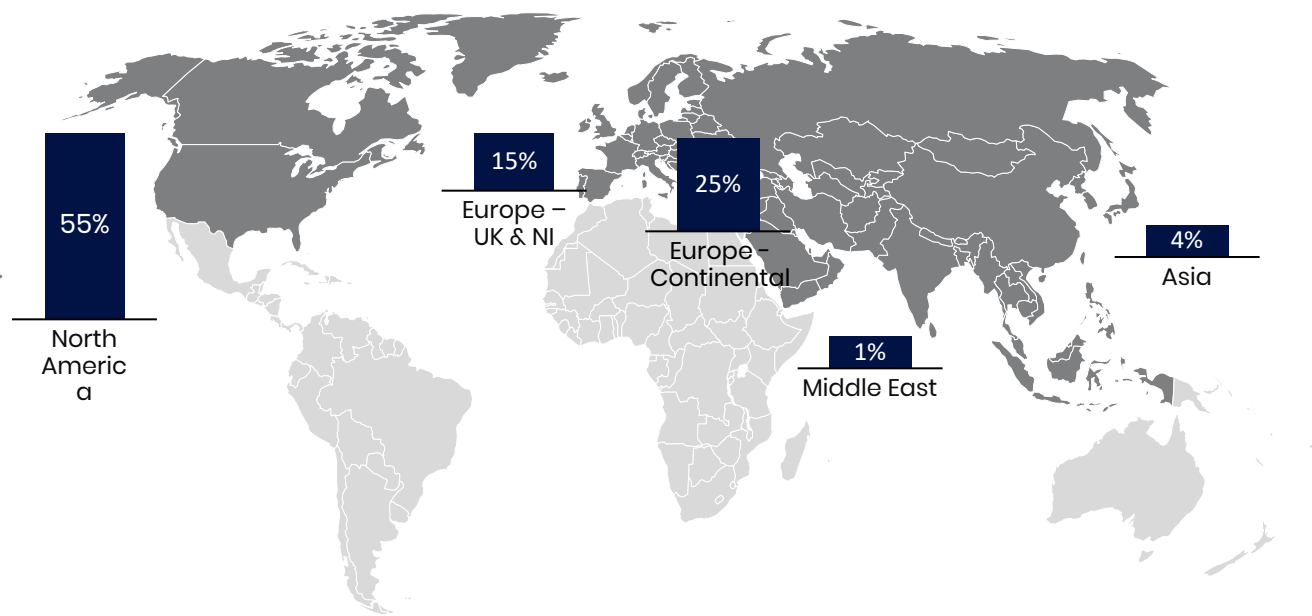


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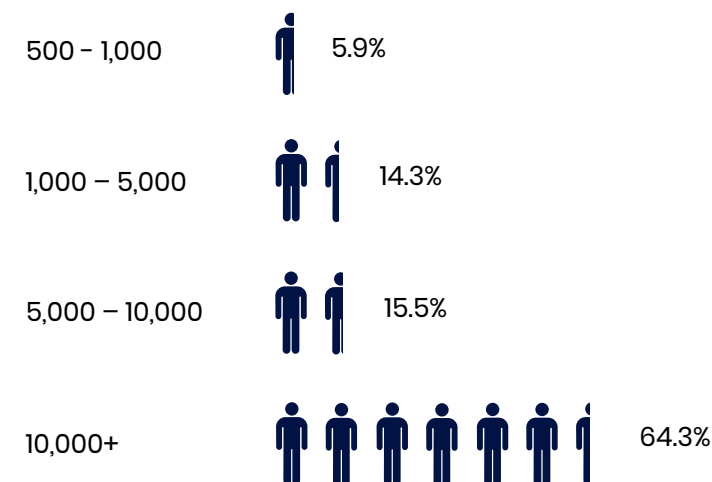
Demographics

In this section we outline the demographics of the survey respondents. The majority of respondents had headquarters in North America (55%), mostly the US. European respondents headquarters made up 40%. This is split by 15% in UK & NI and 25% in Continental Europe. We also received survey responses from some firms with headquarters in Asia and the Middle East. It is also worth noting that the majority of respondents held a senior position within their respective company.

Where is your organisation headquartered?

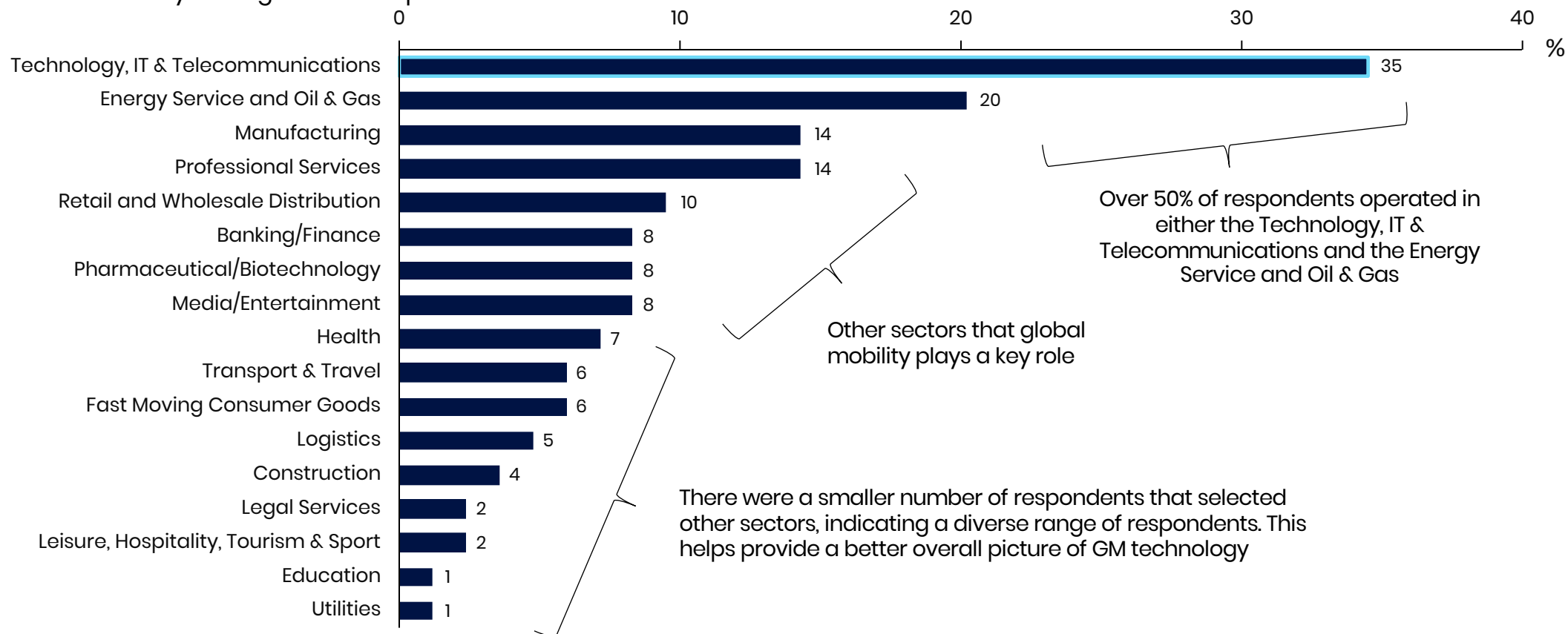


What is your total employee population?



Almost two-thirds of companies that responded to the survey worked for a corporation that employed over 10,000 people.

Which sectors does your organisation operate?

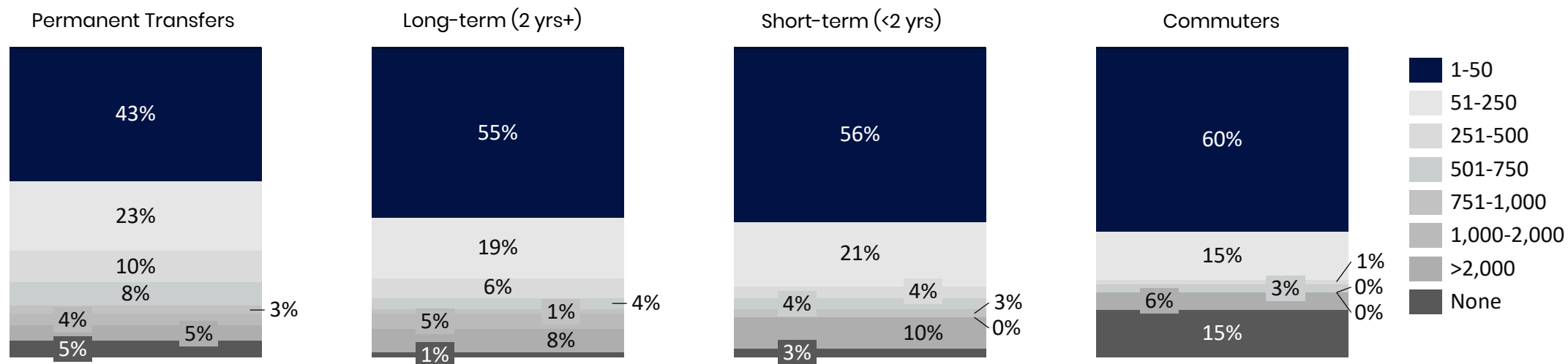


Note: Respondents ticked all sectors that applied

The shorter the move, typically the greater population size managed



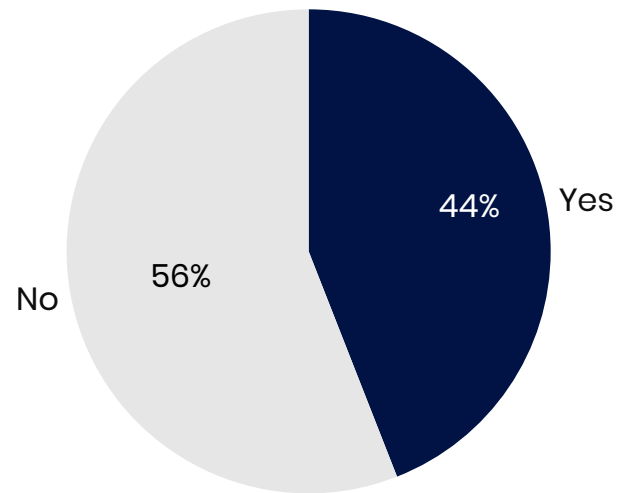
What is the population size of the various moves your mobility program manages?



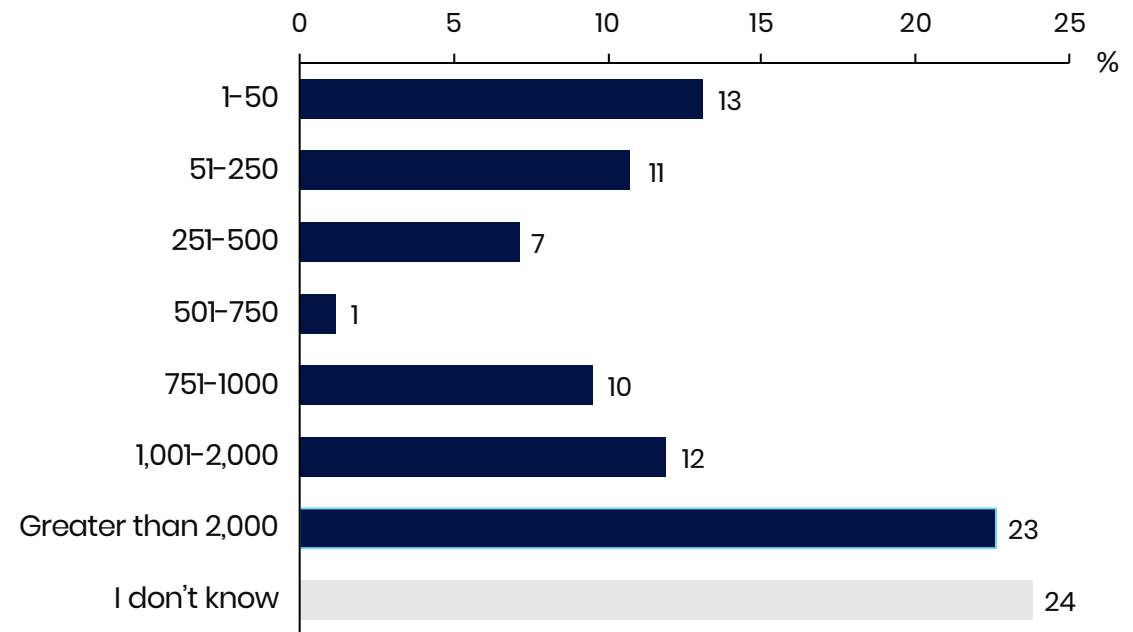
One-quarter of organisations had more than 2,000 business travellers



Is your function responsible for business travellers?



Approximately how many Business Travellers (those not on a formal 'Assignment' Policy) does your organisation have?



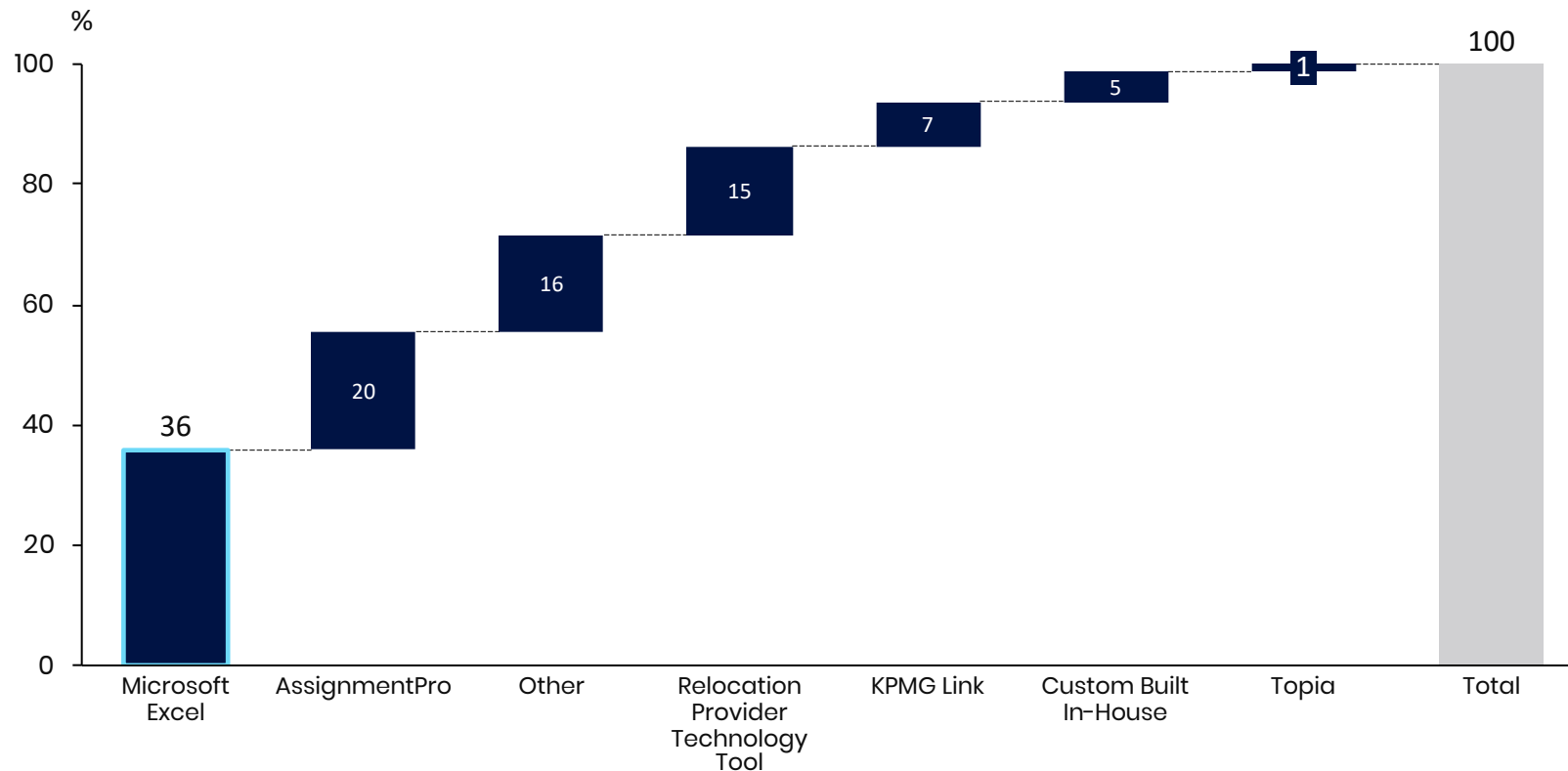
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Microsoft Excel is still a key asset for global mobility solutions, however other platforms are growing

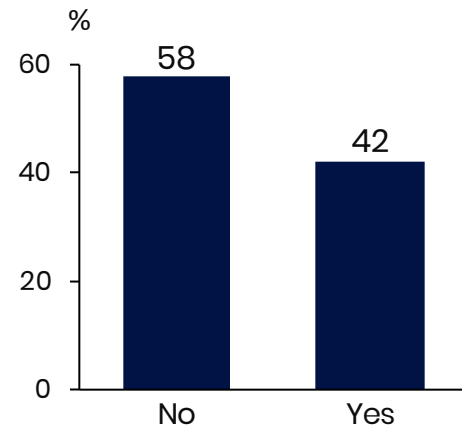
What is the primary tool or technology system you are using today to manage your program?



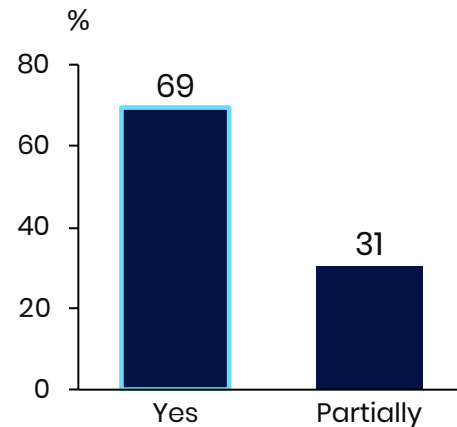
The majority of users found their global mobility technology platform does support their program as intended



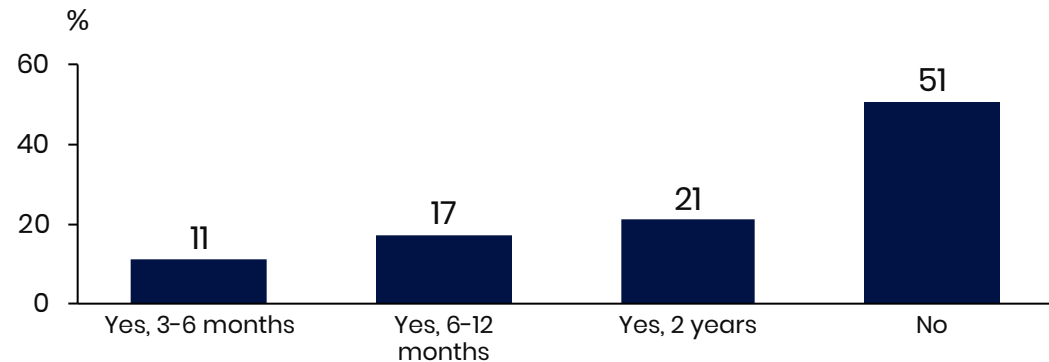
Do you have a global mobility technology platform?



Does it support your program as intended?



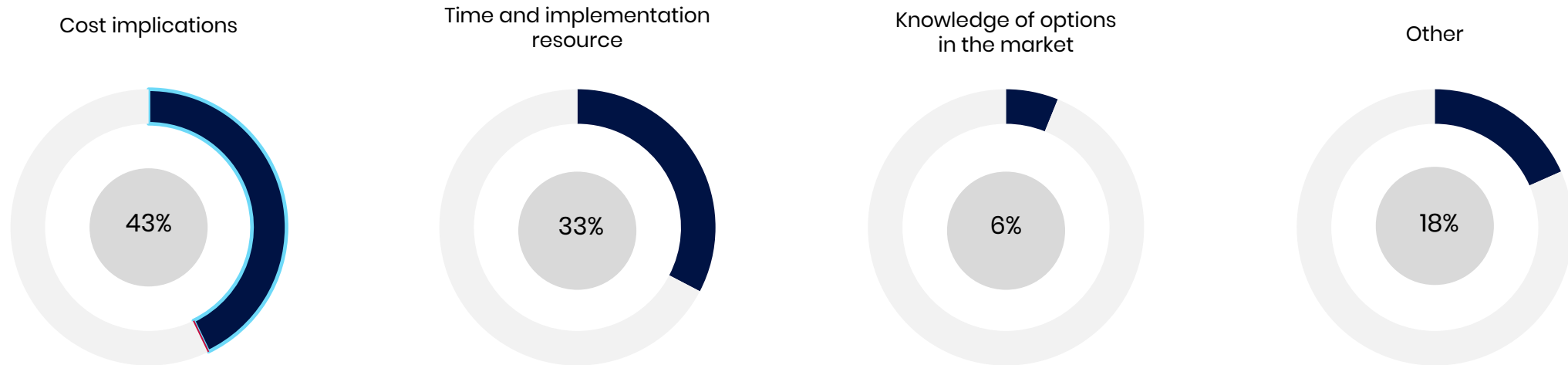
Do you intend to pursue a new global mobility technology platform?



For those that do not currently have a global mobility technology platform, cost was the main barrier



If you have looked at new global mobility technology platforms, what barriers have prevented you from implementing a solution?



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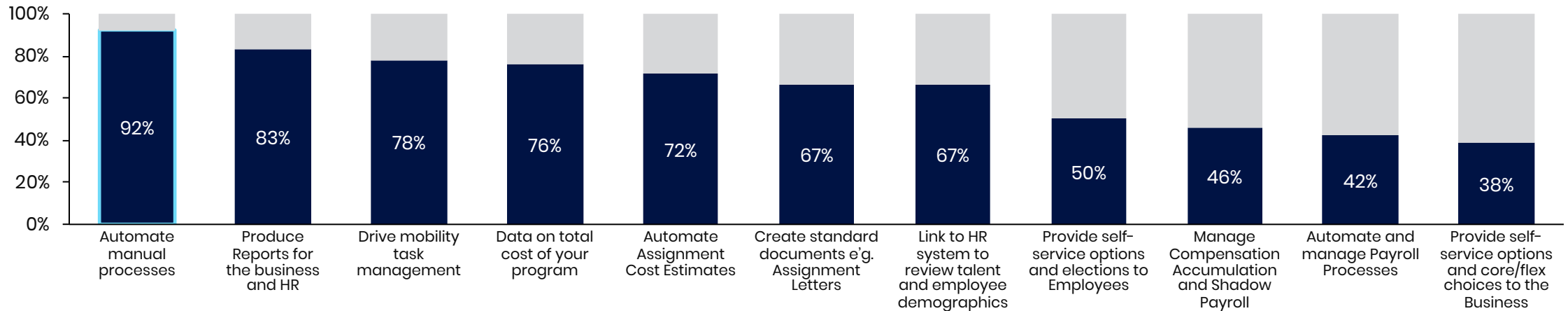


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Automation is a highly valued function within a global mobility technology platform

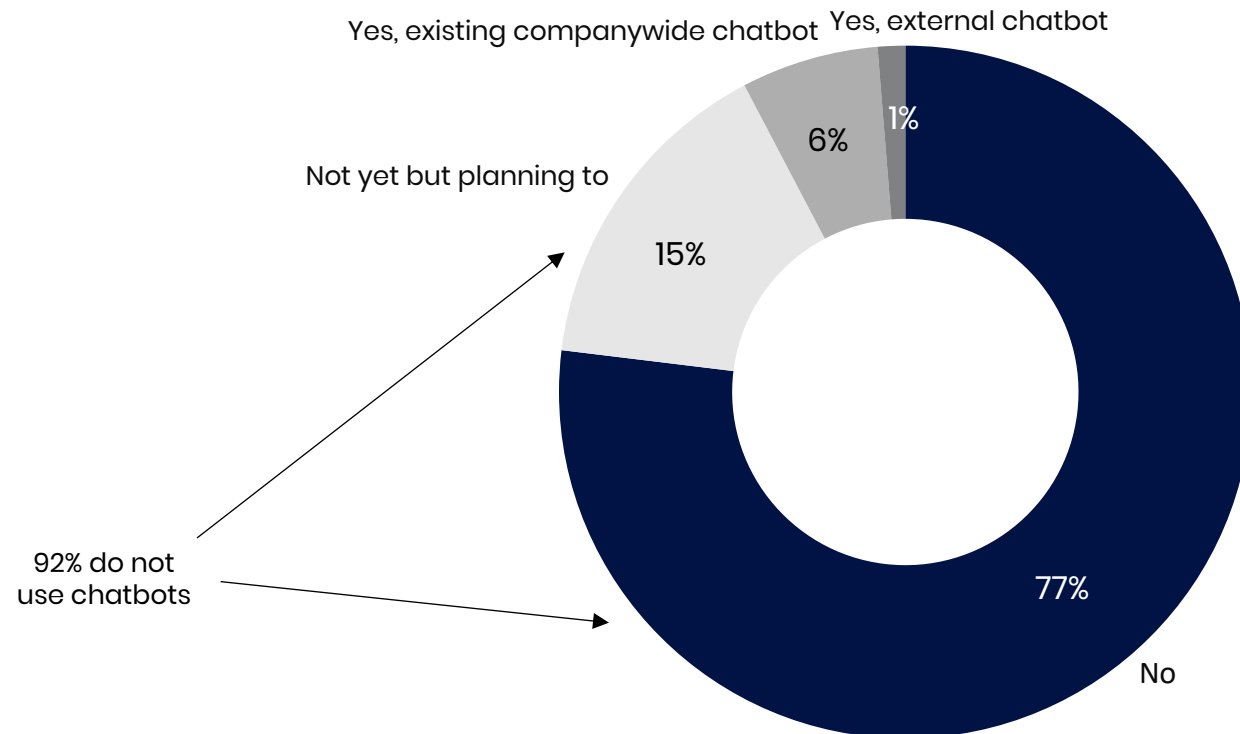


How important is the following functionality within a GM technology platform?



Chatbots are not widely used within GM programs

Do you use Chatbots within your program or are you planning to?



In section five, Digitalisation, we discuss the use of artificial intelligence or virtual reality within global mobility platforms – of which, chatbots are widely noted as a potential tool.

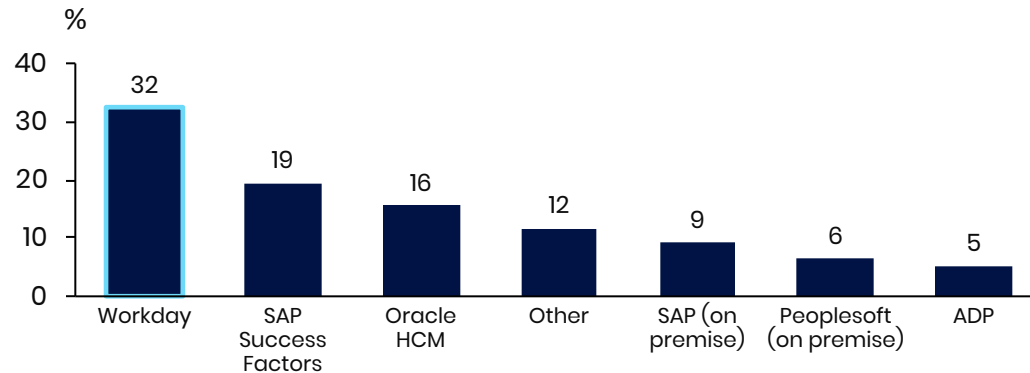
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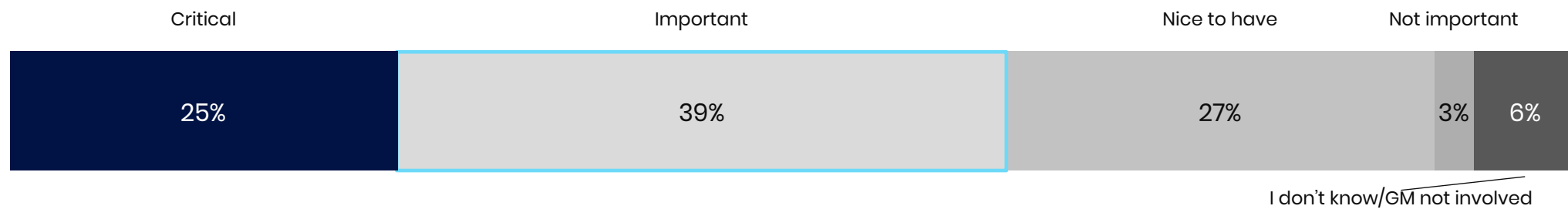
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Workday is the most widely used Human Resources Information System (HRIS) tool

What HRIS tool do you use?

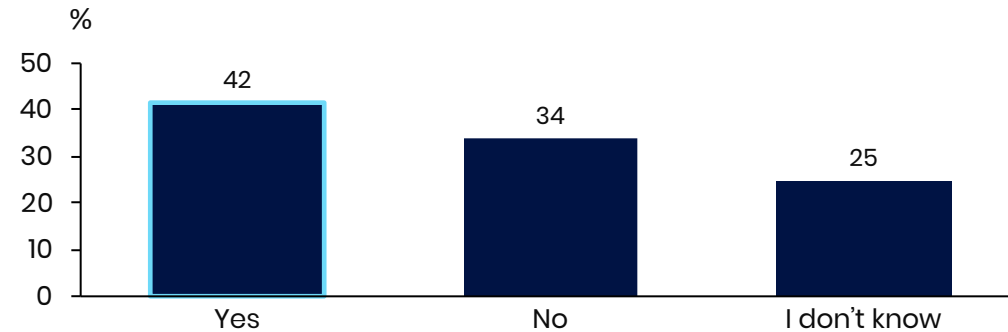


How important is it that your HRIS tool is integrated with your GM Technology?

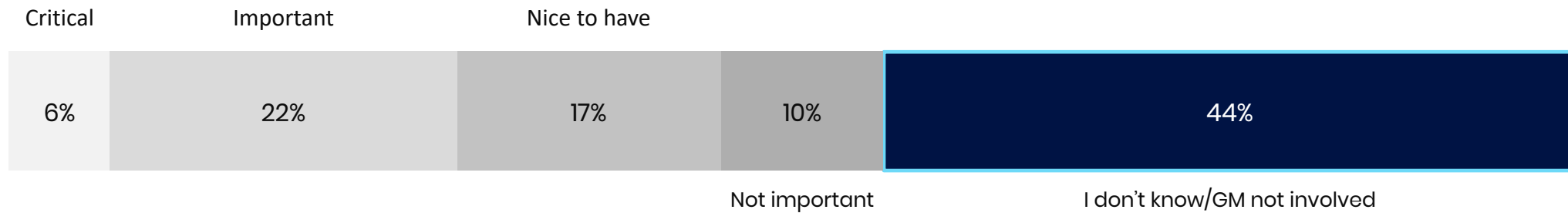


Almost half use an Applicant Tracking System

Do you use an Applicant Tracking System (ATS)?

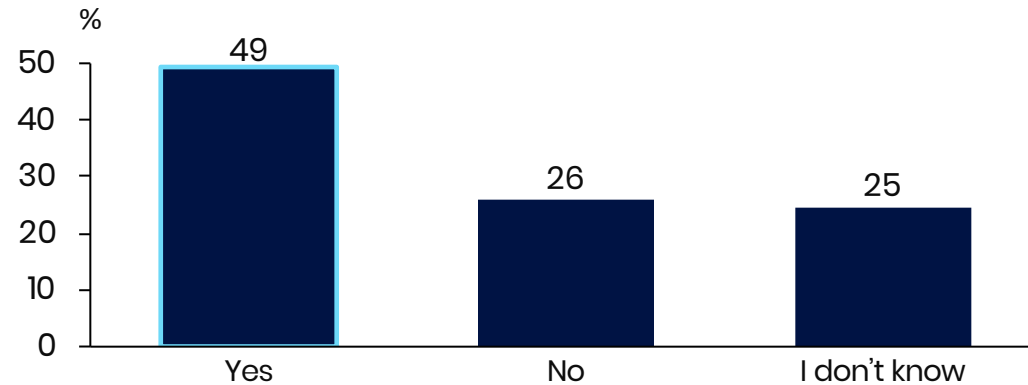


How important is it that your ATS tool is integrated with your GM Technology?

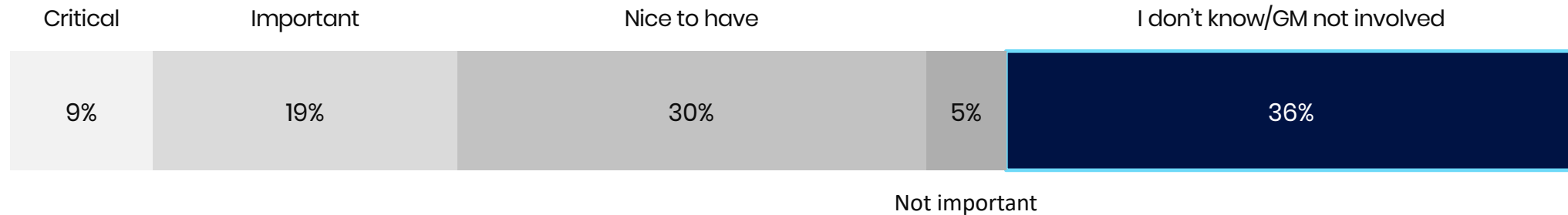


Half of respondents use a Talent Management tool, however a third report it is nice to have it integrated

Do you use a Talent Management tool?

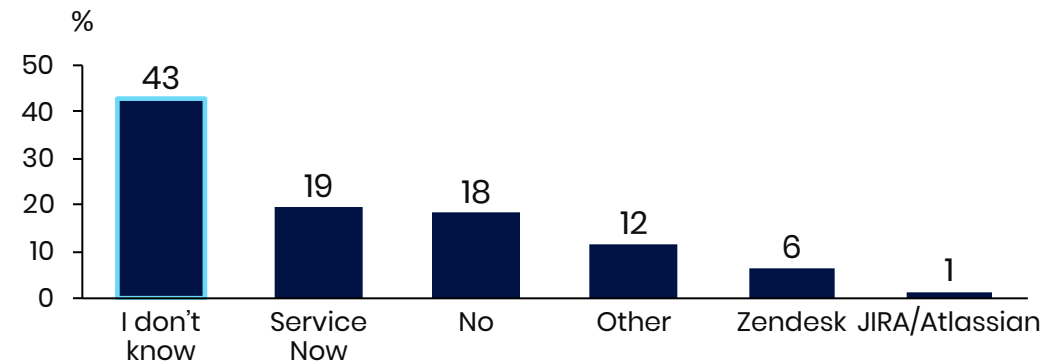


How important is it that your Talent Management tool is integrated with your GM Technology?

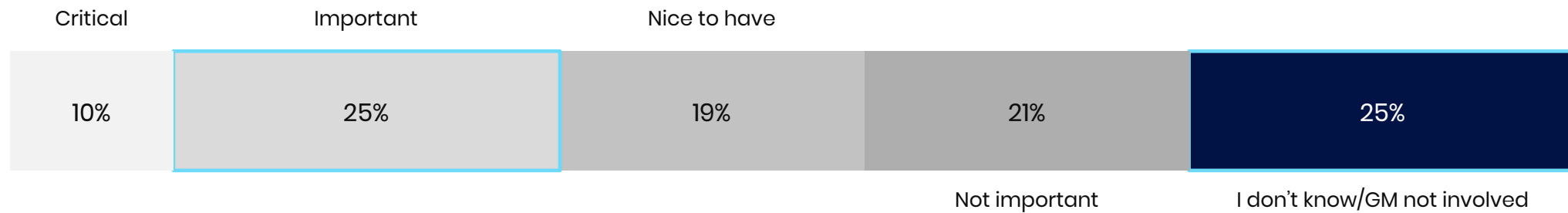


One-quarter find it important that a Case Management platform is integrated

Does your team interact with any case management / ticketing tools in order to connect to wider business processes?



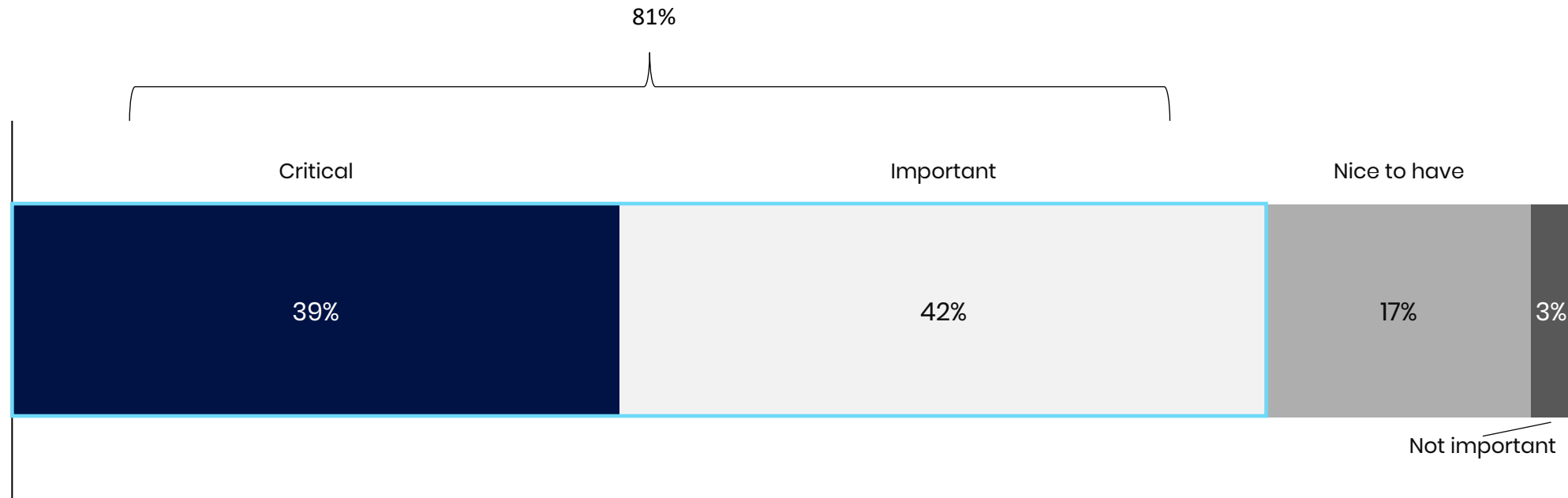
How important is it for you for your GM Platform to integrate with your Case Management System?



Over three-quarters found integration with downstream partners either important or critical



How important is it for you to integrate your GM technology platform with your downstream partners – Tax, Relocation, Immigration etc. so that you and your employees can see everything in one place?



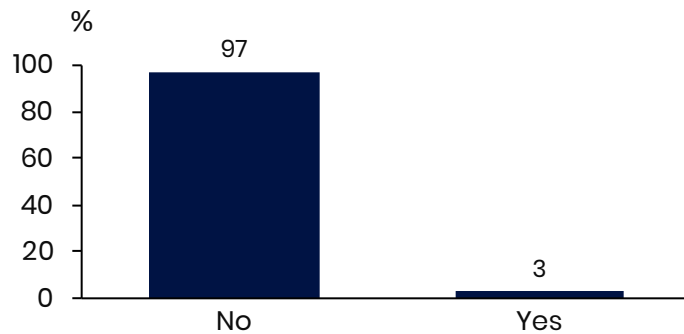
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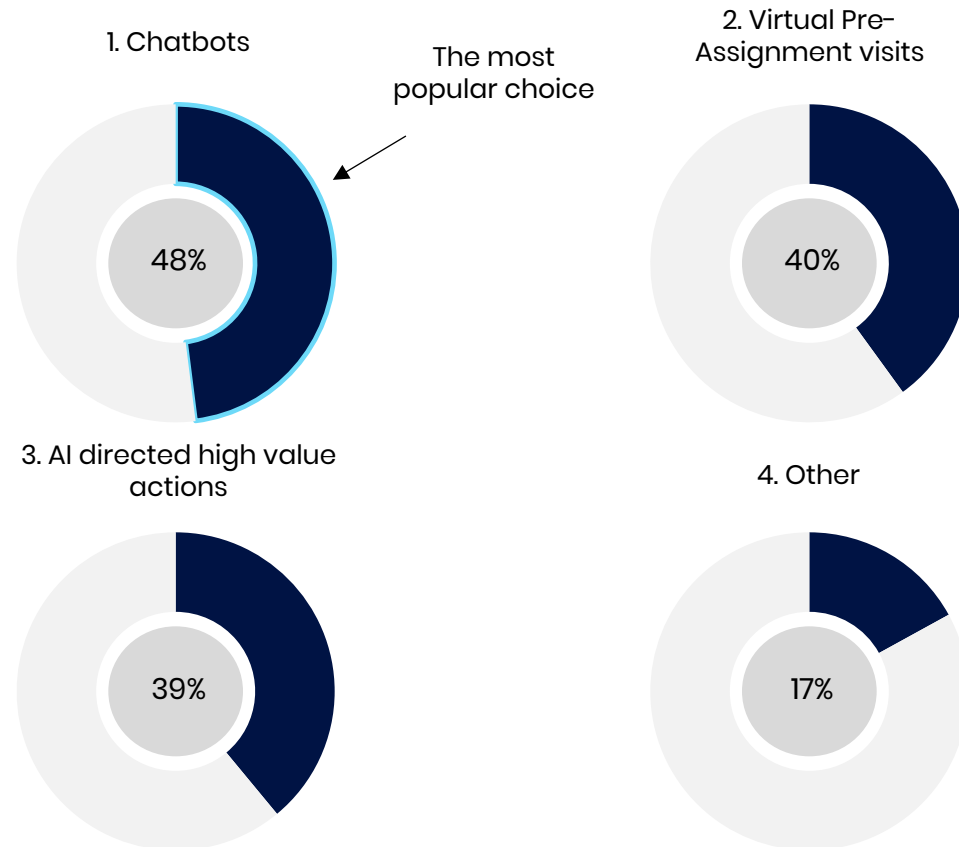
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V.	Digitalisation	20
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Artificial Intelligence or Virtual Reality is yet to play a key within GM technology programs

Do you currently use any Artificial Intelligence or Virtual Reality tools within your Mobility program?

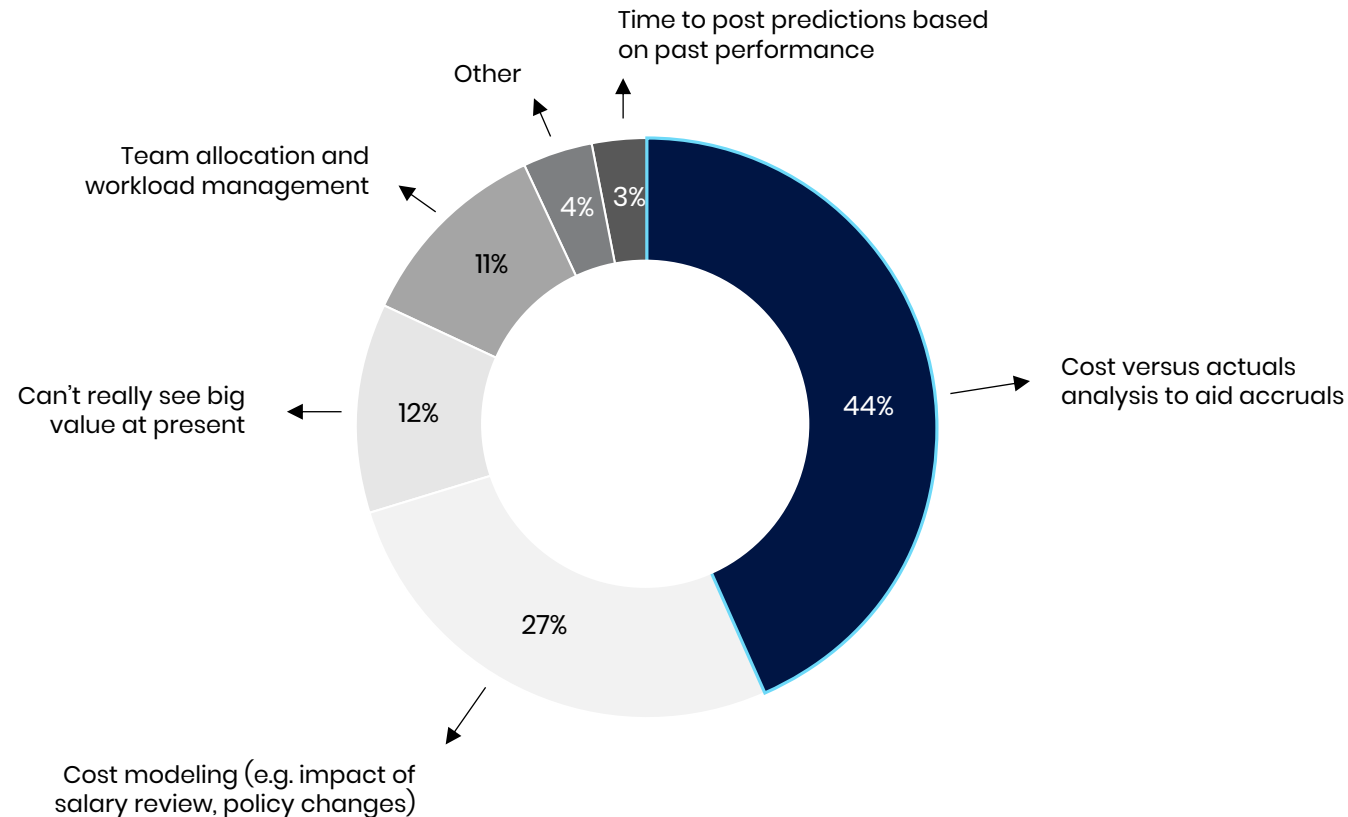


What area of AI & VR is most useful / interesting to you and your program?



The majority of respondents would value predictive analytics for cost analysis and cost modelling the most

If you could use predictive analytics to gain better insight into your program, what would you value most?



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How do you feel GM technology can help your talent management strategy stay competitive?



"Capturing data for analytics on selection, success and retention, especially in relation to development secondments".

"Critical - our business is focused on automation and user experience - we need to ensure our mobility program replicates that for our employees, using technology at every opportunity"

"Given the COVID-19 pandemic will move cost (and cash preservation) to the forefront of the C-Suites thoughts, tools that enable GM leads to easily articulated/justified international travel, both formal and informal will be critical, otherwise I do see the number of formal assignments reducing and swapped for more informal travel on a project by project basis"

"If done correctly, it can take away all simple tasks, predict the analytics we would want, and leave the GM team to add true value quicker as business partners"

"Mostly by integrating candidate and associate data, making it easy to provide/exchange information to/with talent sources"

"Better insights and data to align the IA experience and employee career journey"

"Ease of use, access to data"

"By keeping us compliant especially around business travel and remote working"

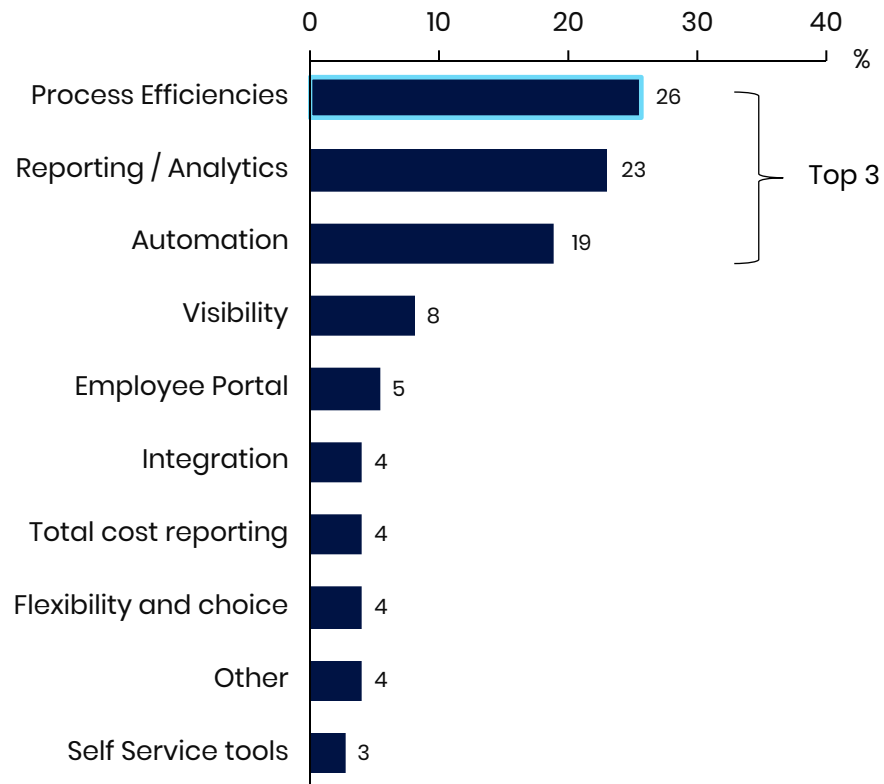
"Help us understand our blind spots to give us an opportunity to optimise and be more efficient. We generate a lot of data but without the right tool to capture and analyse this data we are not getting sufficient value out of institutional know how"

"Improve reporting, analytics and processes"

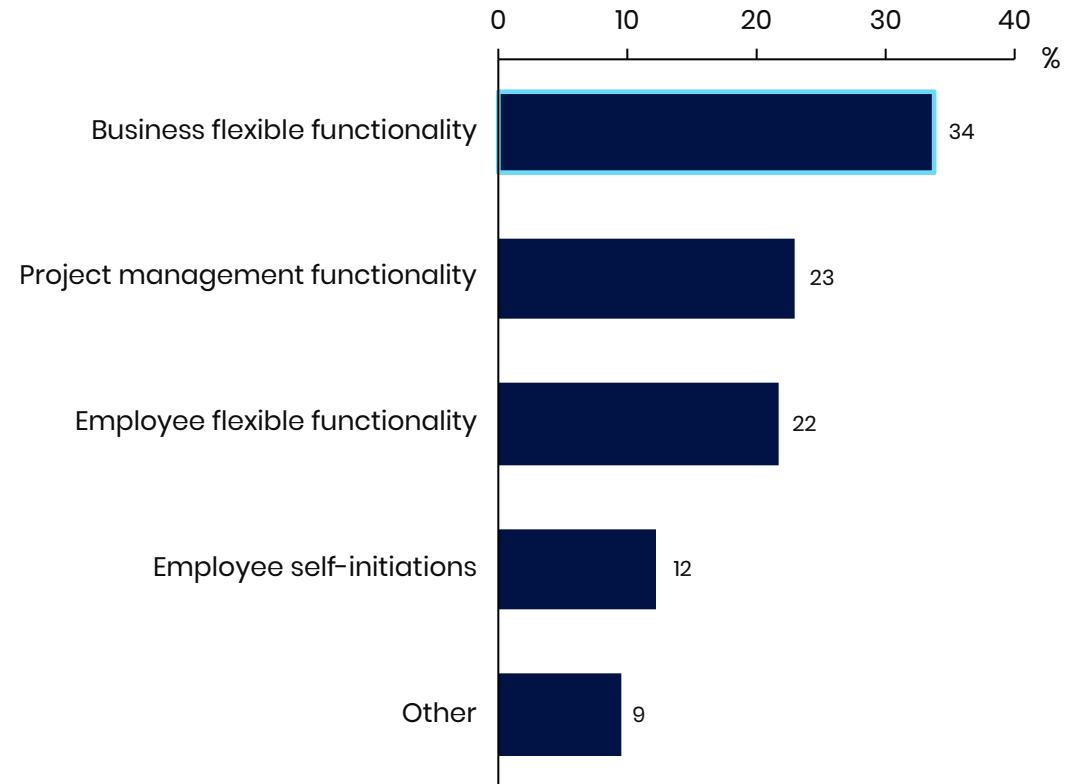
Process efficiencies is currently most valued, whilst business flexible functions are most desirable



What aspect of GM Technology do you value the most?



What future functionality would you like to have in your GM technology?



KBR, Sulzer Management Ltd, Babcock International, Dräxlmaier Group, Lear Corporation, Symphony, Bank Julius
Ltd, Edelman, **Zurich Insurance Company**, Liberty Global, **Mitsubishi**, Telenor GO Pte L
Electronic Arts, Liberty Mutual Insurance, Gap Inc., MAYER BROWN INTERNATIONAL LLP, Westinghouse Electric Company, BRUNEL, G
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Asia Pte Ltd, BMS, Equinor, Lockheed Martin, Unipart, **Booking.com**, Fiserv, Mars Inc, Vifor Pharma, Bristow
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Centrica PLC, Gucciardi, MLD Consulting, Zurich Insurance Company, Abbott Laboratories, **CHANEL**, HENSOLDT,
MacDonald, Accenture, Comcast, Hertz Autovermietung GmbH, Oracle, ADP, Continental, Hitachi Europe Ltd, P
Aggreko, COTY, IBM, PTC, **CHANEL**, Albemarle Corporation, Deloitte, Illumina Inc, Publicis, Allianz SE, Diamond

Survey Respondents

Thanks to our survey respondents, a selection of
which are detailed here