2018

RELOCATING PARTNER SURVEY REPORT

NetExpat
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EY Building a better working world

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Key findings

- Employers confirm that the number one reason for employees not accepting an international assignment is the potential disruption to the career of their relocating partner.
- Today's mobile employees are no longer interested exclusively in the financial aspect of their international assignment package – they are extremely concerned about the fate of their partners while abroad.
- There is an increasing number of dual career couples who depend on the income of partners during international transfers; 77% of partners are now working before assignment.
- The overall level of education of relocating partners has substantially increased over the years, with 82% of them securing a bachelor's, master's or PhD degree, close to 91% for mobile employees. Both the mobile employees and their partners are seeing each other as equals.
- 90% of international employers offer some form of partner support to their internationally mobile population and either plan to increase their current relocating partner benefits or significantly improve the visibility and communication of these benefits to employees and partners.
- 33% of employers have increased the job performance of their assignees through offering partner support.
- 62% of employers wish to encourage employee acceptance of an assignment by offering support to their partners.
- Employers provide partner assistance to support their Diversity and Equality programs.

SECTION 1

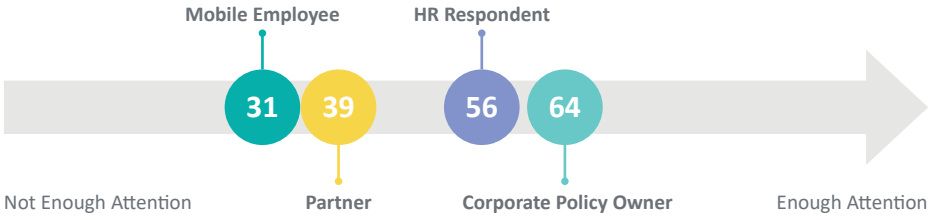
EXECUTIVE SUMMARY

EY and NetExpat joined their unique and respective experience to provide this much needed survey. The response has been overwhelming! In a few short months, the Relocating Partner Survey has become the largest survey conducted on the relocating partner topic. The following pages offer a truly global perspective: 3,412 respondents from 121 host locations, 81 nationalities, 320 senior HR representatives from both corporations and international governmental organizations, 2,086 mobile employees, and 1,006 expat partners were part of this historical survey, rich in lessons to be learned.

The challenge of the relocating partner has been a growing topic in international mobility over the last years. The old cliché of the "trailing spouse" is no longer applicable because of several drivers, such as the reduction of the financial attractiveness of mobility packages linked to costs savings initiatives, the ensuing increased percentage of highly educated and professionally active partners contributing to the family income, and the growing percentage of GenY, "aka Millennial", employees for whom family happiness during international assignments is paramount.

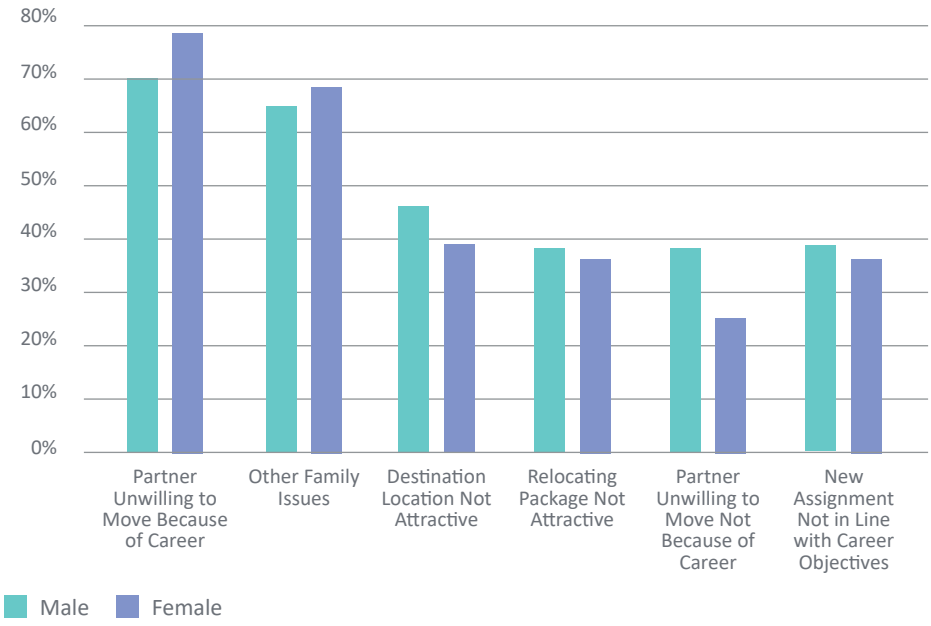
Relocating partner support has evolved from assistance offered occasionally 20 years ago as "lip service", to the current sophisticated programs supporting talent strategies. Today, 90% of international employers offer some form of partner support to their internationally mobile population – see page 20.

Do you feel your current employer is paying enough attention to partner support?



What was not anticipated is the magnitude by how much today's mobile employees are sensitive to what employers provide for their partners. Today's mobile employees are no longer interested exclusively in the financial aspect of their international assignment package. They are extremely concerned about the fate of their partners career while abroad. In response to the survey question, "Do you feel that your current employer is paying enough attention to partner support?", employees are the most frustrated of all parties by what employers are offering today, even more so than partners themselves!

What are the most common reasons for not accepting an international assignment within your organization?



The following pages will provide a rich, global, in-depth analysis of the key factors impacting the relocating partner, which influence the decision of an employee to accept an overseas assignment.

This survey would not have been possible without the extensive support and inspiration from Cercle Magellan, Cindex, NFTC and WERC whom we thank for their contribution.

SECTION 2

OBJECTIVE OF THE SURVEY

Why another survey?

Partner assistance has been a growing field in employees' benefits over the last 20 years. Evolving from minimal support offered by corporations, to a comprehensive package of assistance which support corporations' requirements to continue to move employees with partners across borders.

The lack of reliable data and research reports has been frustrating for corporations as they look to develop appropriate partner assistance policies. Permits Foundation was the first organization to launch a qualitative wide-range survey in 2009. Their important findings helped the whole international mobility industry rethink what corporations should reasonably offer to partners. The first shift in drivers of employees were then revealed. The survey identified that mobile employees were not interested purely in the financial aspect of their package, but were very concerned about what would happen to their partners' careers and social life while abroad.

Now, 8 years later, as Gen Y represent approximately 50% of the mobile workforce, further factors are impacting the requirement for corporations to identify ways to improve relocating partner assistance. Cost containment of global assignments continues to be an overriding concern leading to decreased compensation packages to move across borders. However, at the same time, there is an increasing number of dual career couples who depend on the income of partners during international transfers. Partners are more educated and professionally active and wish to have a career in their new country.

Facts and data are the only way to build solid international policies, therefore EY and NetExpat joined their unique respective experience to launch this much needed survey. The response has been overwhelming! As a result, the Relocating Partner Survey is the largest survey ever conducted on the partner assistance policy.

A wide target audience

This extensive survey was meant from day one to be very inclusive: EY and NetExpat were not only interested in gathering the point of view of a few major Country Headquartered corporations, or just a few industries. We wanted this survey to offer a true global perspective, which has been achieved thanks to the 81 nationalities of the respondents.

We also wanted to include the point of view of International Organizations like the World Bank and the Governmental diplomatic world. The results confirmed that these international organizations share the same challenges and concerns as the multinational corporations even if they do not tackle the relocating partner topic exactly the same way.

One of the distinct differences in the Relocating Partner Survey is "who" we surveyed. Our goals were ambitious, and we decided to include all stakeholders: traditional international mobility policy owners; HR Business Partners around the world to offer a wider HR community point of view; the mobile employees on an expat status, local plus or permanent transfers; and finally, the relocating partners.

In the next few pages, you will discover the output from the survey, which will enable you to benchmark your current partner assistance policies and determine if there are areas you wish to modify or improve based on the results.

"Finding opportunities to support dual career families can enhance organizational empathy, and boost the talent and career mobility strategies for organizations. At the personal level, stress related to career support and integration into the new location can be mitigated through awareness of partner support opportunities and programs."

– Manny Cowan
Program Manager, Global Mobility Services at World Bank Group

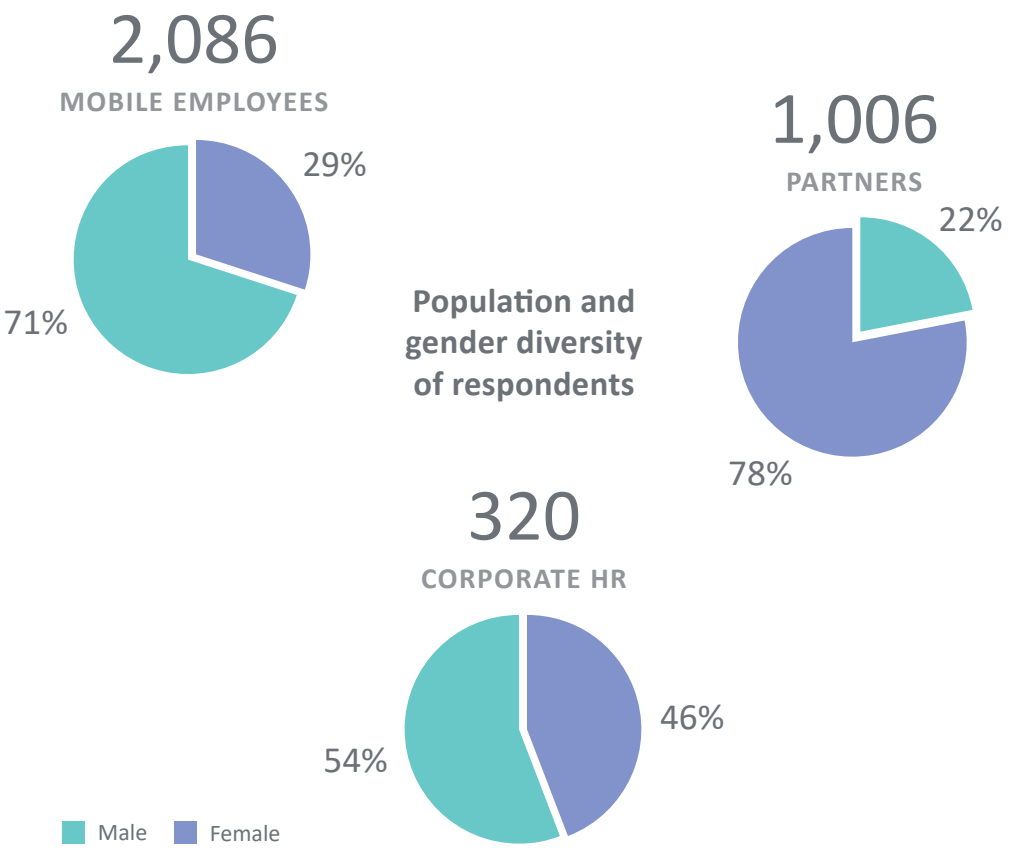
SECTION 3

STATISTICS AND VALIDITY

Survey demographics

Close to 3,500 respondents from 81 nationalities located in 121 countries took part in this survey over a period of 6 months starting in May 2017, comprising 320 corporate HR respondents, 2,086 expats and 1,006 partners. The distribution of gender, age groups, nationalities and locations all contribute to a high level of statistical validity.

All industry analysis has been conducted on a minimum of 10 corporations per industry to guarantee the same level of validity.



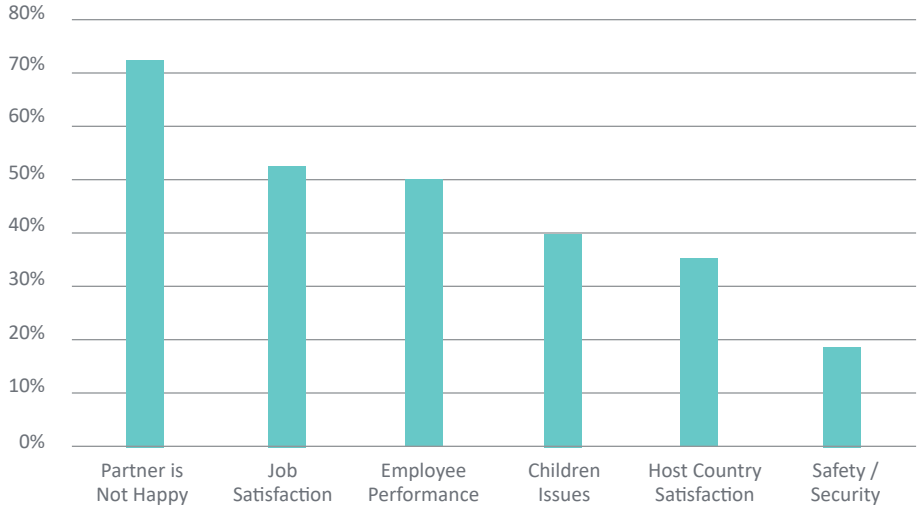
SECTION 4

TALENT SECTION

Reasons for a failed assignment

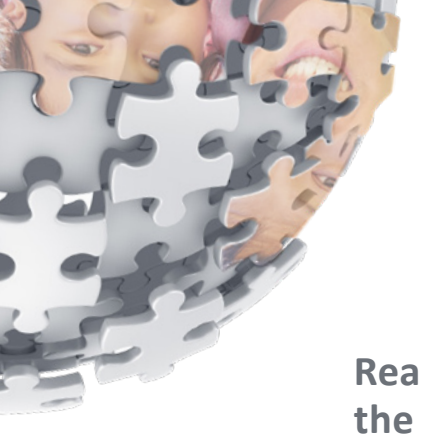
This is not breaking news: for at least the last 10 years, international mobility departments were aware of the danger of neglecting the partners of their mobile workforce. The last major survey conducted by the Permits Foundation in 2009 revealed the partners as being central to the success of international assignments. Eight years later, this has not changed: when asked "What are the most common reasons for a failed assignment," the number one reason mentioned by 71% of corporations is an unhappy, unintegrated partner in the host location.

What are the most common reasons for a failed assignment?



"Most of our candidates with spouse/partner are dual career families and partner support in the host location is increasingly becoming one of the deciding factors for assignment acceptance."

– Yuki Watanabe
Director Global Mobility at GAP



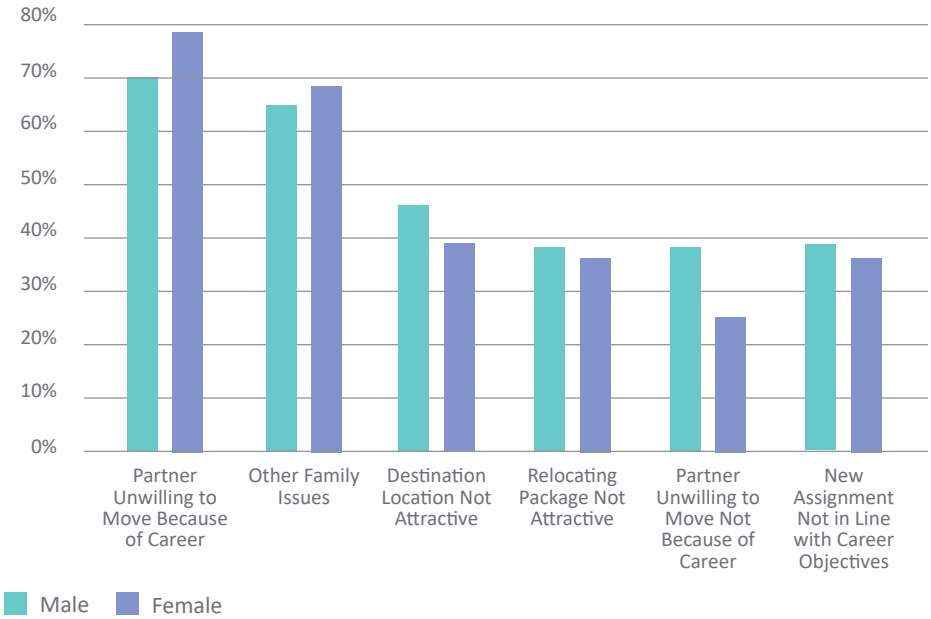
Reasons for refusing an assignment – the corporate perspective

The perception is strongly shared by employers: when corporate HR are asked, "What is the most common reason for not accepting an international assignment within your organization?", partners that are unwilling to move because of their career comes as the top reason, just ahead of "other family issues". When you segment these responses by gender of the mobile employee, corporate respondents sense that the male relocating partner's career is even more sensitive for their female assignees when compared with their male assignees.

"The Carlsberg Group places strong emphasis in the well-being of our employees' family on temporary assignments. The profile of an expatriate and the family models have changed over the years and companies must adapt to such changes by anticipating the adequate individual support. Whilst employers cannot replace a spouse/partner's loss of income, employers should do their utmost to support in other non-monetary ways. At Carlsberg we provide the spouse/partner the best chance to find the right opportunities and settle in the new location by reducing stress, freeing time, share information and engage the right experts to guide the family during the assignment. Happy family, happy expat!"

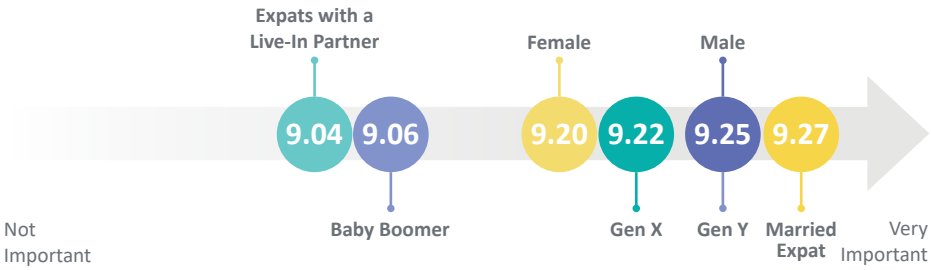
– Romuald Roger, Head of Global Mobility at Carlsberg

What are the most common reasons for not accepting an international assignment within your organization?



Partners are central in the decision process to accept an assignment

An unhappy partner is not now the only reason for a failed assignment, it has also become the main concern of future mobile employees to accept an assignment across borders. Thanks to the increased transparency of social media and the availability of feedback from employees who have returned from assignments, future expats are more informed today than ever. The question is not different when you consider working or non-working partners. Whatever the partner chooses to do abroad, an effective integration and a sense of being actively part of the assignment is absolutely crucial to the success of modern international assignments. To the question, "How critical is the happiness of your partner to your success on assignment?", all age groups of mobile employees see the happiness of their partner as crucial, with virtually no differences between age groups. While there is almost no difference either between male and female expats regarding the importance of having their partner happy abroad (9.25 vs 9.20), married expats are slightly more sensitive to their partners with a score of 9.27, followed by expats with a live-in partner (9.04).

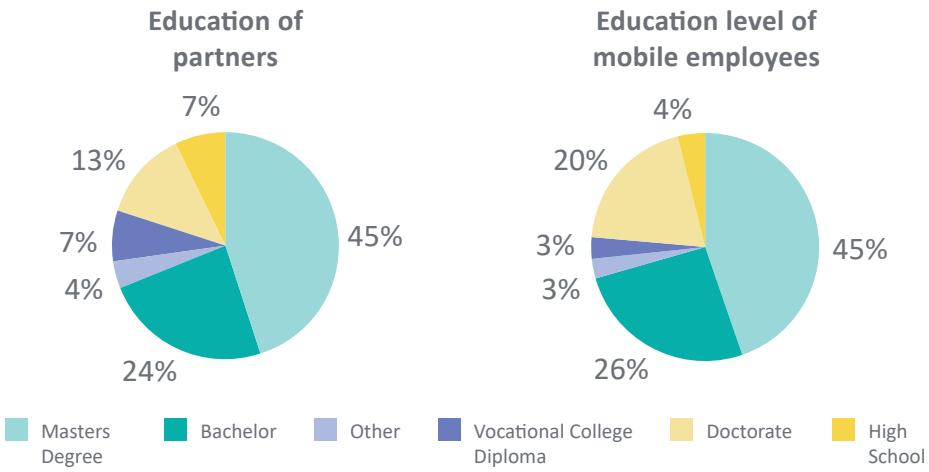


The days of the passive "trailing spouse" are definitively gone, when they were marginally involved in any decision of moving abroad. Today, 97% of mobile employees actively involve their partners in the discussion prior to accepting an assignment, and partners are also saying they were very involved in the decision (average score 9.08/10 for Q90).

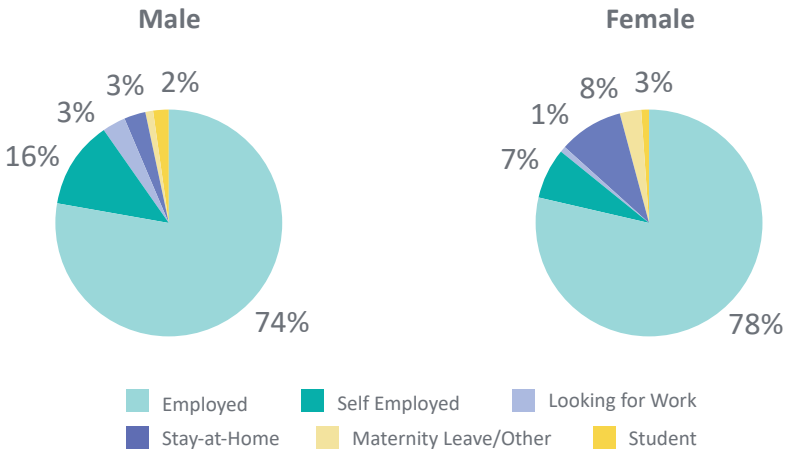
Why are partners so central?

Multiple reasons are explaining this massive shift involving the partner in the decision process:

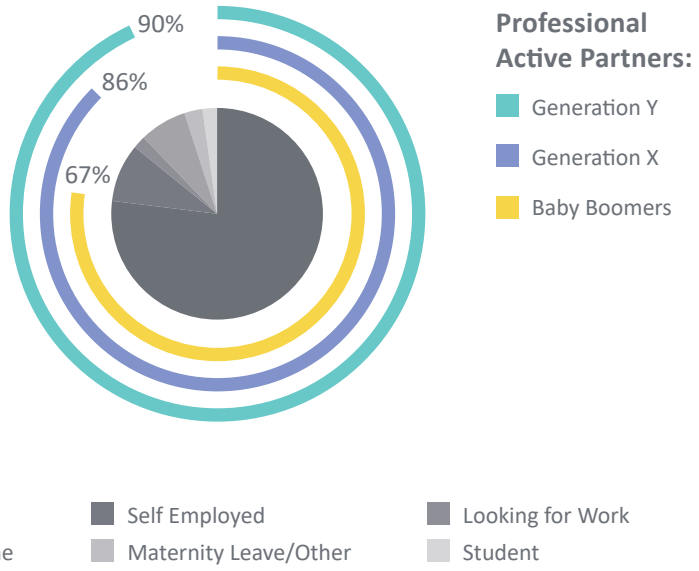
1 The overall level of education of relocating partners has substantially increased over the years, with 82% of them securing a bachelor's, master's or PhD degree, close to the 91% for mobile employees. Both the mobile employees and their partners are seeing each other as equals.



2 The activity of partners prior to an assignment is a big driver. While overall national statistics show that the number of families with two incomes – dual income – are increasing over time, the same is seen within the mobile population. An overwhelming proportion, of 77% of partners, are now working before assignment and contribute to the family income (78% for female partners, 74% for male partners). The majority were employed, but an additional 7% of female partners and 16% of male partners were self-employed.

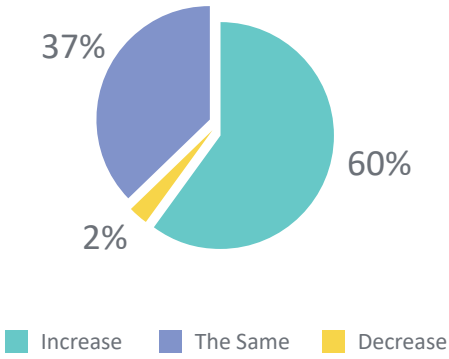


The percentage of working partners is sharply increasing with generations. While 67% of baby boomer partners are professionally active, this grows to 86% with Gen X partners, and to 90% of Gen Y partners who will soon become the majority of mobile employees.



Working vs non-working

The survey reveals that today 66% of partners are working or looking for work while on assignment, clearly an increasing trend confirmed by employers: 60% of employers have seen the percentage of working partners within their mobile population increase over the last 5 years, while only 2% saw it decrease.



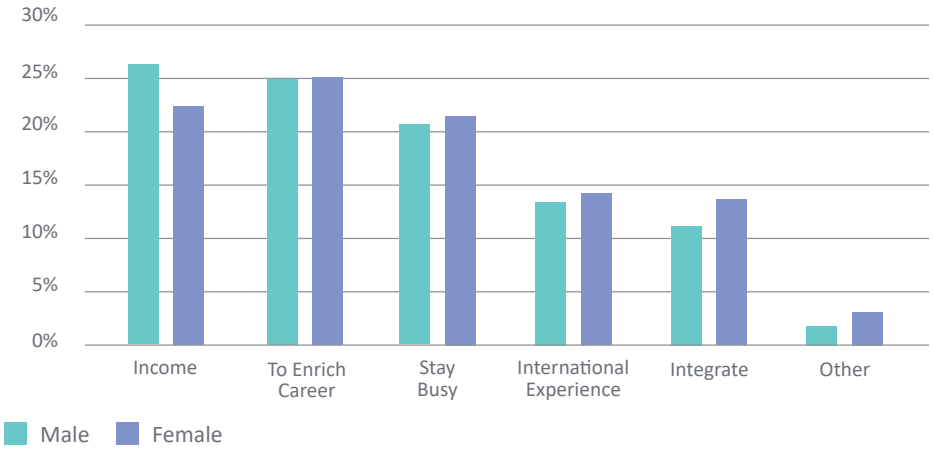
"Finding a job in the new country was not easy. It would have been harder without help. Whether you are a man or a women, you face the same challenges being new in a city as an accompanying partner. Your partner goes to work and you are just there in your new home. There is always the opportunity to do new things if you get the right support."

– Alfonso, Partner from RB Group

The income from the partner – dual income

The reduction of benefits offered by employers to mobile employees across all industries combined with the increasing proportion of professionally active partners, explains the explosion of mobile families facing a "dual income issue", for whom the additional income generated by the partner is key.

While the main driver for working abroad for the male partner is the income, followed by the motivation to enrich their career and stay busy, female partners want first to enrich their career and then add a second income to their family.

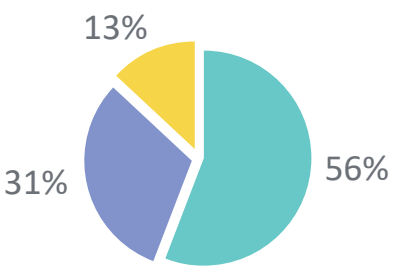


"When you first move to another country as a relocating partner; you really feel quite alone. Having someone in my corner, having that job consultant that was dedicated to me and to helping me reach my goals, that was really important. I am so grateful to the employer of my husband for this support."

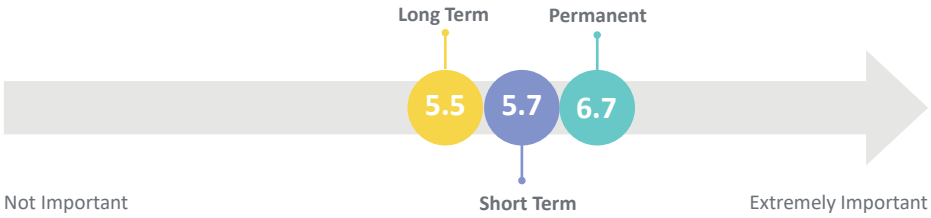
– Stephanie, Partner from Schlumberger

If we focus specifically on the income of the partner, 69% of partners report their income as "significant" (56%) or even "critical" (13%), with only 31% of partners qualifying their contribution to the family income as "not relevant".

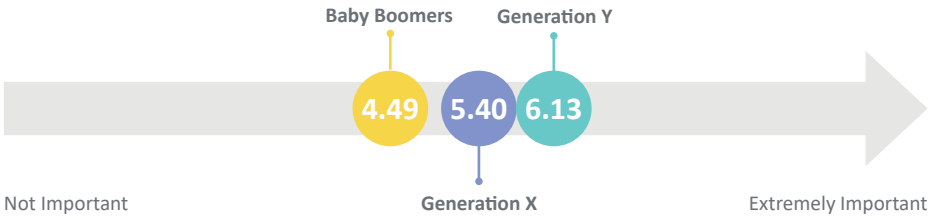
Importance of income



This perception is clearly shared by mobile employees: while the income of the partner for a long-term assignment is positioned at 5.5 on a scale of 10 (which usually includes more attractive packages on the employee side to offset the loss of partner income), it grows to 5.7/10 for short term assignments which do not compensate. This further jumps to 6.7/10 for permanent transfers for which the second income is a must.



It is worth mentioning that the younger the employee is, the more important this income generated by the partner becomes.



The importance of having the choice to work or not

One of the major changes affecting today's partners compared to those from 10 years ago is the way they approach their own future and the importance of "having choices". Today, the same partner might decide to temporarily stop working in one location, and work again in another one. The old strict categories dividing partners once and for all in their life into two groups, the "working" one and the "non-working" one, do not represent the realities of partners. Also, the range of options available today for professionally active partners is much broader: working from home is offering a portable career option.

Employers should therefore ensure that their partner policies support these choices equally for working and non-working partners in order to avoid any form of discrimination.

"The concept of providing partner support for international transfers goes hand in hand with Schlumberger's philosophy in talent management – we provide employees with multidimensional career development, including the opportunity to move geographically.

When a spouse or partner gives up his or her job to follow an employee to a new location, we truly believe that a company should support and assist that employees' partner to find employment in the new location, whether a domestic move or international. This support will ensure the overall well-being of the couple and the employee as a whole. "Happy family, happy employee," is what we often say.

Transferring internationally or domestically creates stress. Being able to maintain the dual income in the family in the new location, takes money off the table as a concern, and employees are able to better focus on their new role.

Partner support is crucial to supporting gender diversity and female mobility. As we are continuing to push to have more women at all levels within the company, it only makes business sense to support dual careers."

– Tania Gandamihardja
Global HR Compliance Manager at Schlumberger

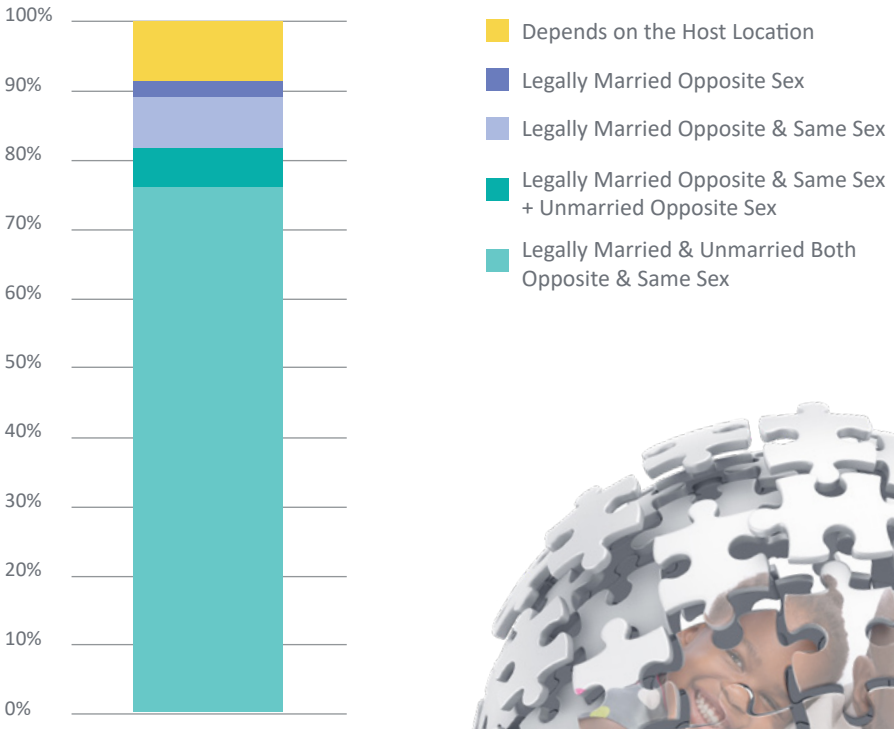
SECTION 5

CURRENT SOLUTIONS & SUPPORTS OFFERED

Who is recognized as a "partner"?

One noticeable change in the way international employers approach partner support is revealed through the way they define "partners", which has evolved over time. While only a few years ago, most employers only recognized legal spouses as beneficiaries of any support offered, employers today approach the notion of the term "partner" in a much broader manner which reflects the sociological evolution of our societies: 78% of employers now recognize the "partner" in the broadest terms by including legally married, as well as unmarried partners of both opposite and same gender. Only 1.2% of employers recognize partners in the most restrictive sense as legally married only.

% of employers recognizing "partners" as eligible to benefits



Objective of support – why do corporations offer support to partners?

Employers have clear strategic objectives when seeking the happiness of their relocating partners.

The first objective depicted in the survey was expected, with 71% of employers offering partner support to increase the overall satisfaction during the assignment. Interestingly close to 33% of employers have increased the job performance of their assignees through offering partner support.

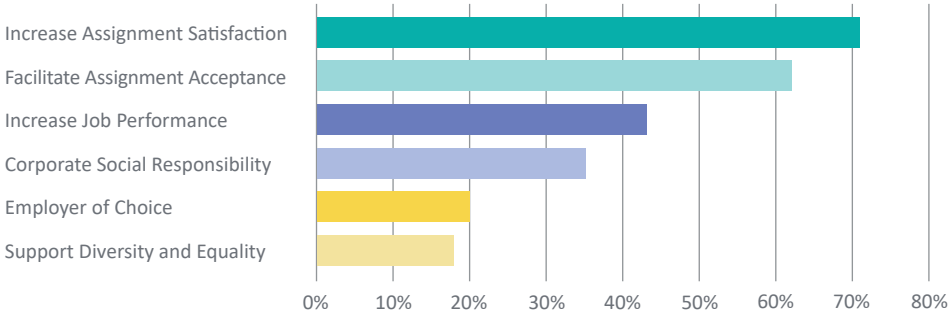
The second objective is new - nearly 62% of employers wish to encourage employee acceptance of an assignment by offering support to their partners.

> *"In today's modern world, support for the partner of the assignee is essential if the assignment is to be successful. It shouldn't be underestimated the challenges from both an individual and family perspective that the partner of an assignee also has to overcome in adjusting to life in a new country. If the family is happy then the assignment will be too."*
>
> *– Joanne Yee*
> *Regional Mobility Manager, APAC & MEA at Bayer*

The third objective for corporations is to provide partner assistance to support their Diversity and Equality programs. Survey data confirms that female assignees recognize their partner's integration and career abroad as paramount before considering an assignment for themselves.

Finally, 20% of employers offer partner support to add to their image of "employer of choice".

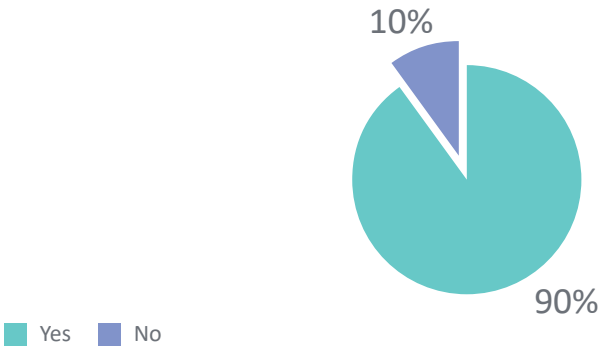
What are the objectives of your partner support policy?



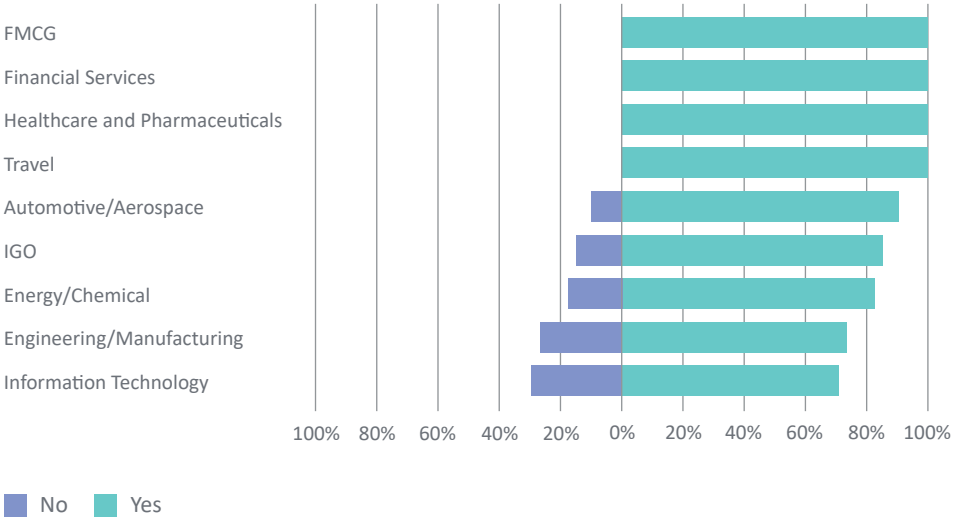
Who offers partner support and what support is offered?

As evidenced by the survey data, the relocating partner issue is a growing concern. The percentage of employers offering some form of support has sharply increased over the last few years: in 2017, 90% of employers offer some form of support to the relocating partner.

Do you offer support to partners?

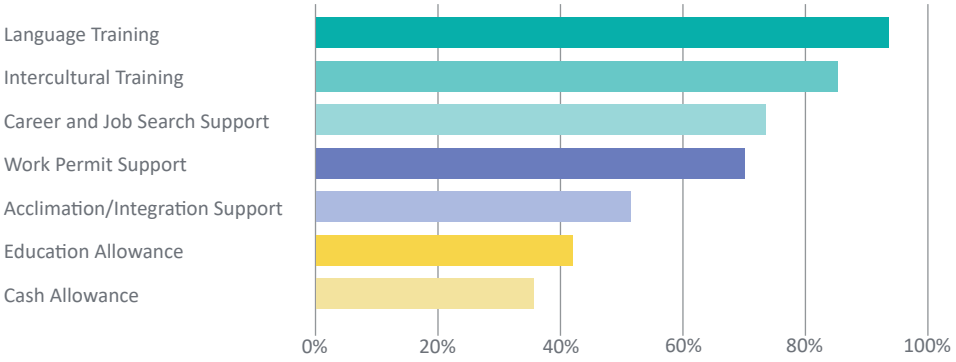


The FMCG, Financial Services, Healthcare/Pharmaceuticals, and Travel industries are the industry sectors where partner support benefits are most offered – 100% of the corporation surveyed. More than 80% of employers in the Automotive, Aerospace, International Governmental Organizations, Energy and Chemical industries offer partner support.



Traditional expatriate benefits such as intercultural training and language support are offered today to relocating partners by respectively 94% and 85% of corporations.

What partner support benefits do you offer to at least one policy type?



Although these services benefit relocating partners, none of the above assistance is really considered as primary "partner support" by employees nor by partners simply because they do not directly answer the biggest expectations of partners. Partners expect to be supported to integrate more easily in the host location, rebuild their network, work or study while abroad or contribute to a voluntary organization.

Over the last 25 years, service providers have emerged to fulfill these specific needs of the partners: they use coaching support, offered over the phone or face to face, to inform and guide partners. In these instances, targeted business specific intercultural training and use of local language is important. They also use some of the latest technology to support partners while abroad: the emergence of social network communities like the NetExpat Community gathering thousands of relocating partners, allowing them to meet other partners in similar situations virtually and/or face to face all around the globe.

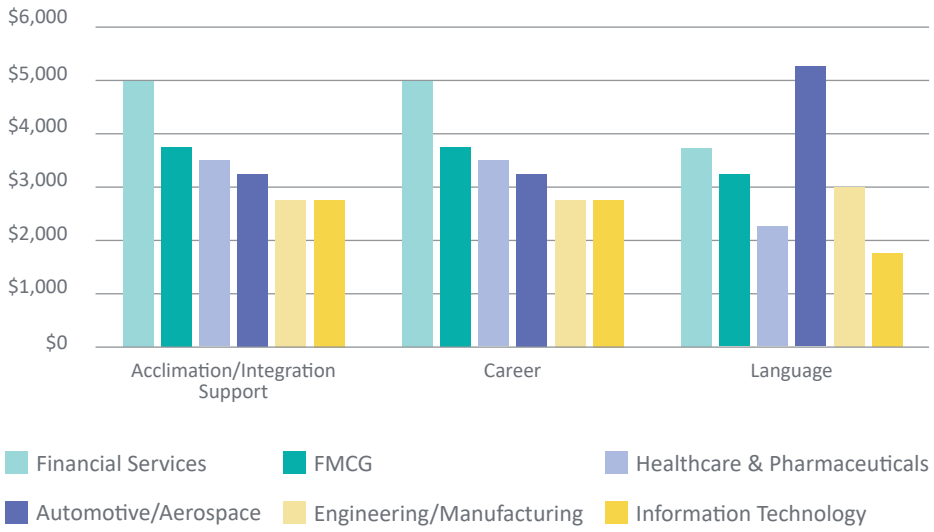
Similarly, the emergence of specific job search engines like the PartnerJob Explorer which gives partners access to 250 million job opportunities indexed by language spoken all around the world, have significantly expanded the options for supporting working partners. So today, current partner support programs range mainly from "Career and Job Search" support, aiming at helping partners to work while abroad, and "Acclimation" support, ensuring that non-working partners happily integrate through a hobby, further education or volunteering.

Career and job search support is now offered by 71% of employers, a sharp increase in comparison to previous data. Acclimation support is steadily offered by 51% of employers striving to support the non-professional integration of accompanying partners, while Education support is offered by 43% of employers.

Partner support budgets?

The overall average investment in partner support for the main categories are the following: $3,150 USD for Acclimation support, $4,990 USD for Career and Job Search, $8,489 USD for Education allowance, $3,218 USD for Language training and $4,505 USD for work permit support.

When we dig further into the numbers, we see that: Acclimation support ranges between $5,000 USD in the Financial services to $900 USD in the Energy and Chemical. Career and Job Search ranges between $7,250 USD in the Financial services to $2,875 USD in the Healthcare and Pharmaceutical industry. Language training ranges between $5,183 USD in the Automotive and Aerospace industry to $1,733 USD in the Information Technology.



No doubt that the digital age is enriching the support available to relocating partners. But as expected, due to the feeling of isolation after moving to a new country, relocating partners place a high value on direct human interaction: face-to-face support is still the preferred format of support for 70% of partners!

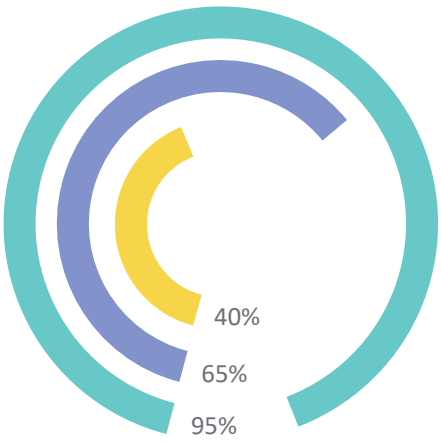
"Having a great benefit package in international mobility is not enough; awareness of product and support linked to the relocating partner is an essential function that HR department needs to provide staff."

– Evgenia Rozenfeld
Outpost USA Expatriate Manager at Shell

Next to “Career and Job Search” and “Acclimation Support”, work permit support, which is offered by 70% of employers has evolved very quickly over the last few years, and the good news is that most countries allow partners to work thanks to the exceptional work of the Permits Foundation, which campaigns globally for the rights of relocating partners to be able to work on their dependent permit.

Out of the top host locations accounting for 80% of today’s global mobility, 95% grant work permits to relocating partners. There are still, however, a few notable exceptions and subtleties linked to marital status: non-married partners from opposite sexes are recognized by 65% of these top locations, while same sex couples experience the most challenging situation with less than 40% of these top locations granting them access to work permits.

Locations allowing work eligibility for relocating partners

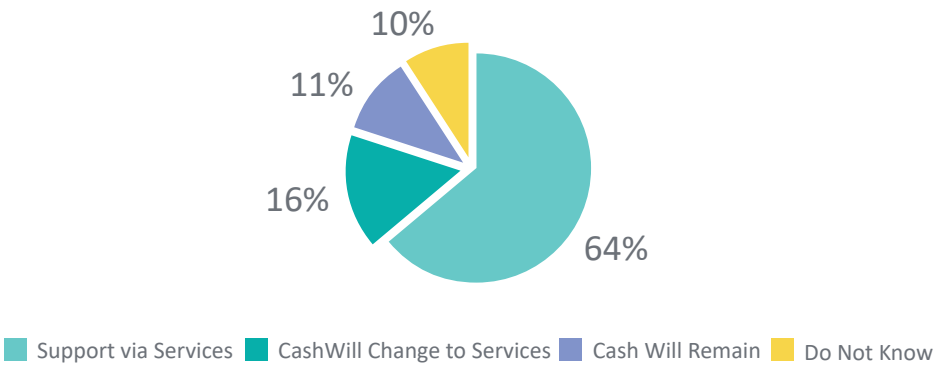


The chance of securing a work permit in countries which do not allow partners to work is extremely limited and therefore would hardly justify investing in the work permit application. Therefore, work permit support for the partner will most likely diminish over the coming years. The money saved would be far better invested in appropriate partner support programs and to support organizations such as the Permits Foundation.

Support as a service or as a cash allowance?

37% of corporations offer a cash allowance to support accompanying partners, provided via the employee. This number has sharply declined compared to only 5 years ago when 61% of corporations offered a cash allowance.*

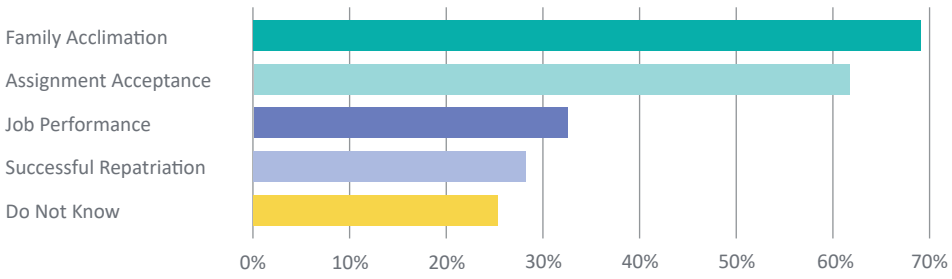
When surveyed about future intentions linked to this cash allowance, 16% of employers confirmed the intent to replace this cash allowance with a form of professional partner support, stating that "even if cash is easy to administer, cash does not solve their relocating partners' issues". Only 11% believe that their partner support benefit will remain as cash allowance in the future. This shift will increase to over 80% the number of employers favoring support over cash to improve the satisfaction of their relocating partners.



What ROI?

When asked about the ROI of investing in partner support benefits, 69% and 62% of employers confirmed that their partner support program has had a positive impact on family acclimation and assignment acceptance respectively. 28% have also noticed a positive impact on the assignment repatriation phase.

Your partner support program has had a positive impact on the following



** Permits Foundation: 2012 International Mobility and Dual Career Survey of International Employers.*

"Time and again, we have seen the return on investment derived from our robust partner support offering – from the initial perception of and buy-in to the assignment offer, to the level of engagement of the family in the assignment location. Consideration of the full family dynamic is an imperative in the modern IA equation."

– Ashley Daly, International Compensation & Global Mobility Partner at AstraZeneca

SECTION 6

FUTURE OF PARTNER SUPPORT

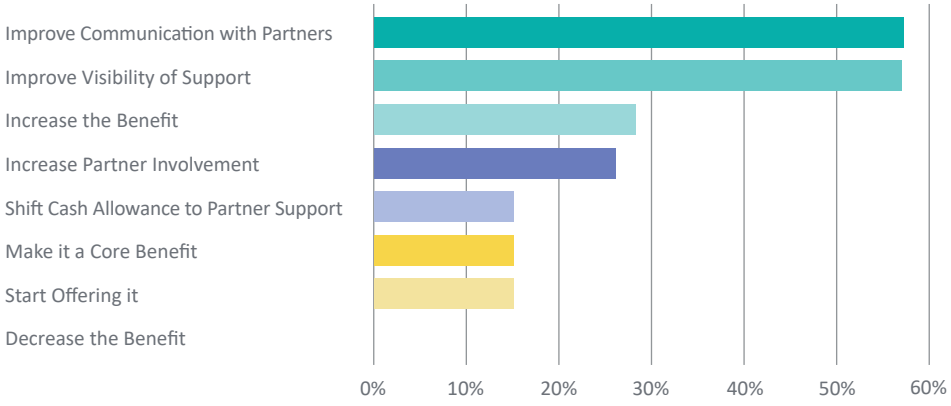
Improved communication

The future looks bright for partner support, with most employers well-aware of the crucial role played by accompanying partners. A strong 28% of employers plan to increase their current relocating partner benefits, while no employers surveyed plan to decrease the benefit, which is encouraging given constant cost containment mandates.

The main target for the coming years will clearly involve communication. The top two changes planned by employers regarding their current partner support will aim at improving the communication with the partners and improving the visibility of the partner support within their mobile workforce.

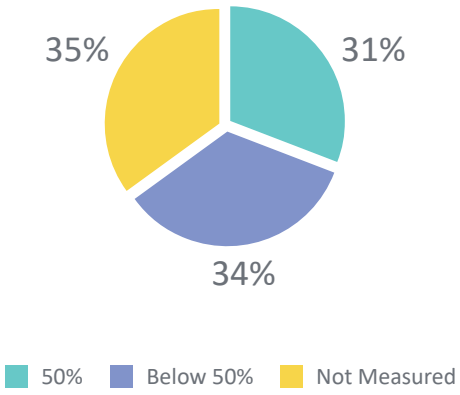
These two points are the consequence of the increasing complexity of assignment briefings. This increase has led to information overload, therefore innovative ways of involving the assignee and relocating partner in understanding all of the benefits being provided takes on additional focus when highlighting key information to ensure a successful assignment.

What would you change regarding your partner support policy?



Communication is indeed the main issue for a majority of employers as highlighted by "utilization" rates – reflecting the percentage of partners taking advantage of the partner support benefit offered by the employer. The survey reflects 31% of employers reporting a utilization rate above 50%, while 34% are under 50%, and 35% not measuring it. Employers scoring a utilization rate of under 50% mention first the lack of awareness of their partners, followed by the lack of awareness from their employees as reasons for the low rate.

Utilization Rate of Partner Support Program



Given the importance of the relocating partner issue, communication should be central in all partner support initiatives. This is an overall industry objective requiring the involvement of all service providers offering support to internationally mobile employers – from the relocation management companies, local destination service providers and immigration specialists, to improve communication with employees and their partners.

"The EY/NetExpat Relocating Partner Survey has provided extremely useful data in helping the organization assess its HR policies for the key areas of partner support and dual careers in the broadest possible context."

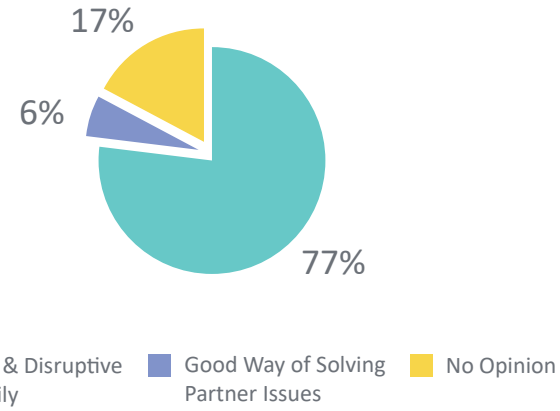
– David Crellin-Jones, Human Resources Department, Foreign & Commonwealth Office, London

Is splitting the family an option?

When HR leaders were asked if having the employee commute to his/her international assignment location and by consequence splitting the family is a good idea, an overwhelming 77% of employers see mostly challenges and risks in destabilizing the family. “Split family assignments” are viewed as a solution to partner support by only 6% of employers. This is echoed by assignees and partners themselves.

Commuters and rotational assignments are viewed as acceptable only for assignments of durations up to 6 months.

What is your opinion of split family assignments?



“When we moved to Geneva for Kellogg, we really valued the support they offered to my husband to help him secure a job locally. The guidance regarding the Swiss professional culture, the valuable advice in terms of CV build up, the keys to a successful Swiss motivation letter, and all the do’s and don’ts in interviews and negotiations in Switzerland were key. But most importantly, the NetExpat team were strong motivators and gave him confidence which is an important, if not the most important booster when looking for a job abroad. I am really thankful to Kellogg for integrating such a key support for all they employees embracing an expat adventure.”

– Stephanie, expat from Kellogg

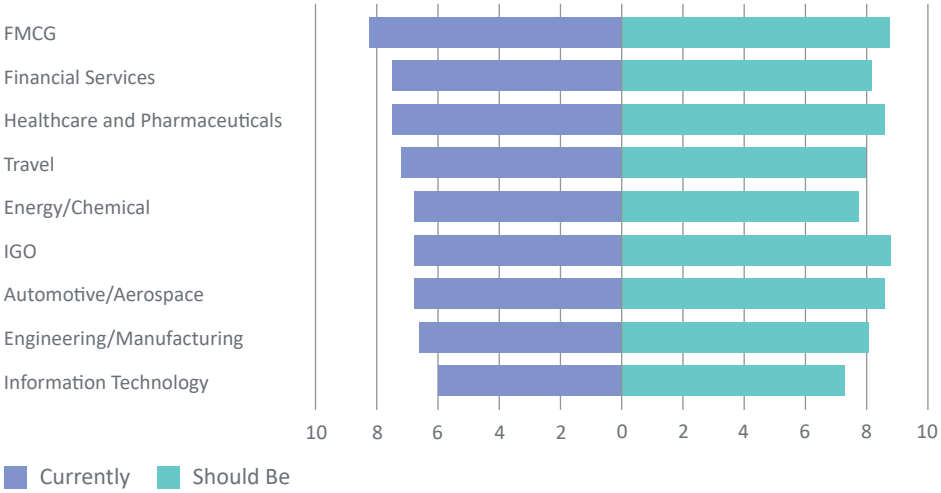
SECTION 7

CONCLUSION

Family friendliness

The resounding message expressed by mobile employees and their partners to their international employers is that addressing the well-being of the accompanying partner is a key driver to successfully managing international mobility.

Employers received the message clearly with 90% of corporations offering support to the accompanying partners of their mobile workforce. Being an "employer of choice" is part of the corporate agenda. When HR leaders were asked to rate their current family friendliness, the average employer scored 7.2 on a scale of 10. When asked to rate where they should be, the average employer aspires for a score of 8.37, confirming that corporations from all industries want to be viewed as more family friendly.



Best practices

A few key best practices have emerged from this survey and related interviews which confirm that the partner support benefit is no longer considered a “lip service” but a true “intentional support” instrumental in support of global mobility talent strategies.

Know your company’s realities

Talk to talent colleagues, local HR colleagues, mobile employees and their spouses/partners before planning any change. Best practices in establishing partner support benefits emerge from employers who attentively listen to their mobile employees.

Stay in the driver’s seat

Partner support services evolve quickly, with the scope of options growing constantly for relocating partners. Join NetExpat’s Global HR Think Tank(*) or similar recognized corporate forums to stay educated and keep internal colleagues informed.

Revisit policies

Benchmark, compare practices, then update accordingly. Provide flexibility to satisfy both working and non-working partners.

Monitor KPIs and the positive impacts

Monitor KPIs and the positive impacts of whatever you put in place.

Organizations completing the survey

ABB | Abbott Inc | Adeo Leroy Merlin | Air France | AKKA Technologies | Albea Alfa Laval | Allianz | Araymond | Areva | AstraZeneca Ltd | Bacardi-Martini BV BAE Systems | BANQUE DE FRANCE | Bayer | Belgian Foreign Office | BHP Billiton BIC Group | BMW | Boehringer Ingelheim | Bonduelle | Bouygues International British Council | Carlsberg | Caterpillar | Coca Cola European Partners | Cofidis Continental AG | COTY | Credit Suisse | Daher | Danone | DEA Group DECATHLON SA | Déléguée aux Familles at Ministère des Affaires étrangères et du Développement International | Diamond Offshore Drilling | Discovery Communications | Dragerwerk AG & Co KGaA | Dyson Technology Ltd ElringKlinger AG | ENGIE | Essilor International | EY | Ferrero | Fonterra | Ford Gap Inc | Gemalto | Groupe Atlantic | Halliburton | HSBC | IBM | International Paper | Iter | JT International | Kellogg | King | Lafarge Holcim S.A. | Lego LESAFFRE INTERNATIONAL | Limagrain | Linde Material Handling (KION Group) Mahle International | Mattel | Methanex | Michelin | Mondelez | Naspers National Oilwell Varco | Pepsico Group | RATP DEV | Remy Cointreau | Renault Richemont Group (Geneva) | Roche | Saint Gobain | Sanofi | Schindler Schlumberger | Scotiabank | SEB | Servier | SES | Shell | Siemens | SOCIETE GENERALE | SODEXO | Solvay | ST Microelectronics | SWIFT | Thales Total SA | Toyota Motor Europe | UCB Group | UK Foreign & Commonwealth Office | UN | Unibail Management | UPS | Valeo | World Bank Group

Acknowledgments

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