



AIRINC.
WORKFORCE GLOBALIZATION

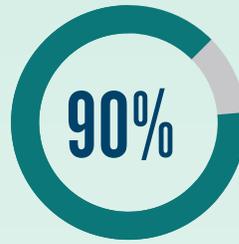
EY
Building a better
working world

BENCHMARK SURVEY

SUSTAINABILITY & GLOBAL MOBILITY

Summary

Sustainability initiatives continue to become more integrated in corporate strategy and impact all areas of the business including Global Mobility. More than 90% of companies have established a definition of sustainability. Most companies define it consistently on a company-wide basis, but some prefer to define sustainability at a more granular level within the organization. Environmental sustainability is the highest focus area across the three ESG pillars.



More than 90% of companies have established a definition of sustainability



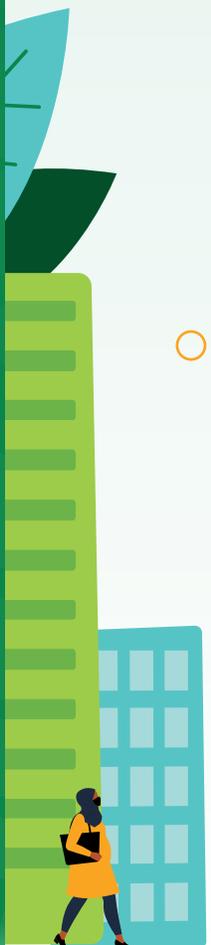
85% of companies have documented environmental sustainability goals at a global, corporate level.

While many organizations report that Global Mobility does not yet play a wider sustainability role outside of the mobility function, **42% of companies made some modifications to their mobility program to align with the company's sustainability initiatives.** This number is up from 27% in AIRINC's 2021 Sustainability survey. Many of these companies expect to build on the changes they have already made, with 82% of respondents anticipating modifying or redesigning their mobility programs in the next 1-3 years to incorporate sustainability goals.

At the individual assignment package level, the primary focus is on reducing household goods shipment. Almost half of companies are actively considering a switch to the provision of furnished rather than unfurnished accommodation where it is available. Similarly, in locations where properties are only available unfurnished, 42% of companies are considering furniture rental as an alternative to transporting furniture around the world.

Despite ESG initiatives gaining traction at the corporate level, 73% of respondents rarely or never receive questions or inquiries about sustainability from assignees/transferees. While employees are being offered more transparency and opportunity to make sustainable choices, the larger focus in the Global Mobility space is coordinating sustainability standards with suppliers and vendors. 78% of participants have either already built sustainability targets into vendor contracts, they intend to do so in the new year, or they take sustainability credentials into consideration when selecting vendors.

A sentiment among many survey participants is that Global Mobility is one link in the overall corporate sustainability strategy, but there is a sense of optimism about how mobility can positively contribute to ESG goals: **42% feel a "net zero" sustainability goal is somewhat or extremely achievable for organizations with Global Mobility programs.**



Sustainability in your Organization

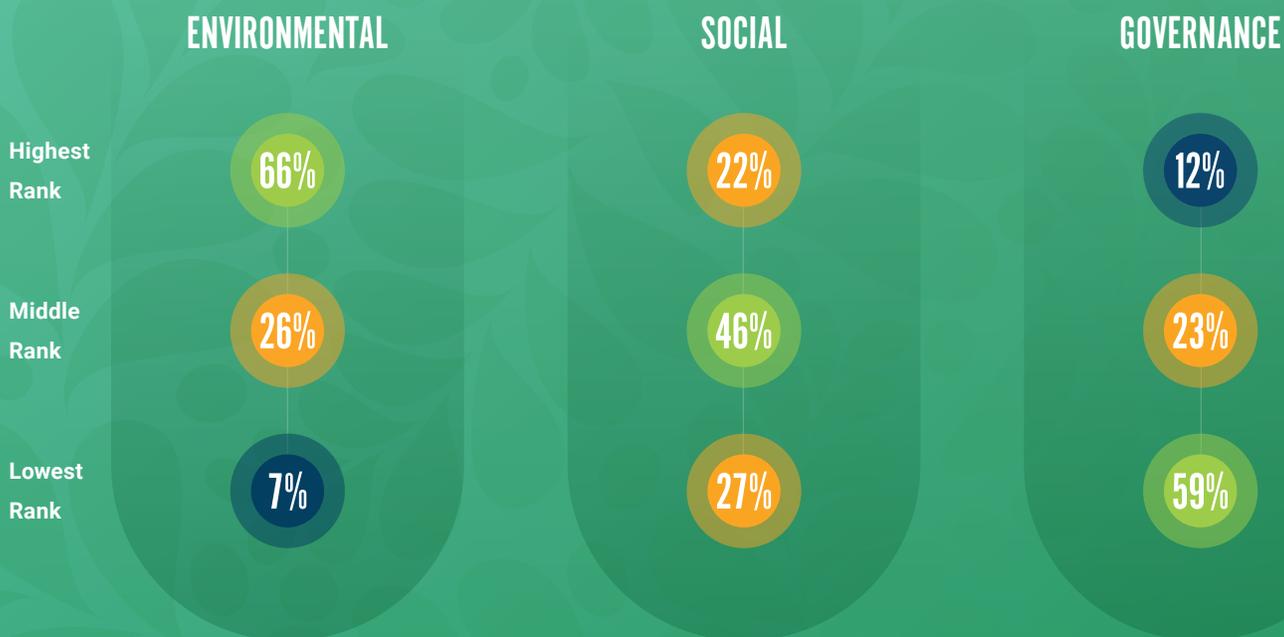


1 Does your organization have a company-wide definition of sustainability?

	Response #	Response %
We have a consistent, company-wide definition	105	77%
We have different definitions of sustainability depending on location, function, or other factors	18	14%
We don't have any definition of sustainability at our company	11	8%
Other	2	1%
Total	136	100%



2 What does sustainability mean to your organization? Please rank in order priority of the ESG pillars your company is focusing on.



3 Currently, how focused is your organization on environmental sustainability objectives?

	Response #	Response %
Extremely focused	85	63%
Moderately focused	40	29%
Somewhat focused	10	7%
Slightly focused	1	1%
Not at all focused	0	0%
Total	136	100%

4 Does your company have documented environmental sustainability goals?

[Select all that apply]

	Response #	Response %
We have documented environmental sustainability goals at a global, corporate level	116	85%
We have documented environmental sustainability goals by function, region, or other factors	44	32%
We don't have any documented environmental sustainability goals	13	9%
Total	173	

5 Does Global Mobility influence sustainability decisions more widely in your organization?

	Response #	Response %
Yes, GM is an active participant shaping sustainability initiatives at the corporate level	13	10%
Yes, GM is an active participant shaping sustainability initiatives at the HR function level	22	16%
No, GM does not play a wider sustainability role outside of the GM function	96	70%
N/A, we are not focused on sustainability	6	4%
Total	137	100%

Environmental Sustainability in Global Mobility

6 Currently, how focused on environmental sustainability initiatives is your Global Mobility program?

From AIRINC's
2021 Sustainability
Pulse Survey

	Response #	Response %	
Our mobility program has been specifically designed to align with our company's sustainability initiatives	5	4%	7%
We've made some modifications to our mobility program to align with our company's sustainability initiatives	57	42%	27%
We haven't done anything specific to our mobility program to align with our company's sustainability initiatives	73	53%	63%
Our company is not focused on sustainability	2	1%	3%
Total	137	100%	100%

7 In the next 1-3 years, how focused on environmental sustainability issues do you expect your Global Mobility program to be?

18%

Our mobility program will be specifically designed to align with our company's sustainability initiatives

Response number: 24

64%

We'll make some modifications to our mobility program to align with our company's sustainability initiatives

Response number: 88

17%

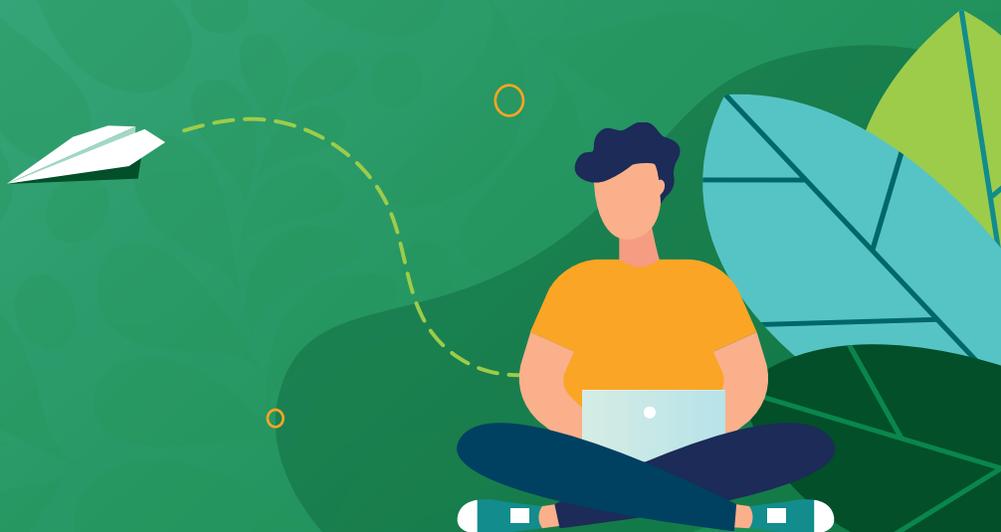
We won't do anything specific to our mobility program to align with our company's sustainability initiatives

Response number: 23

1%

Our company will not be focused on sustainability

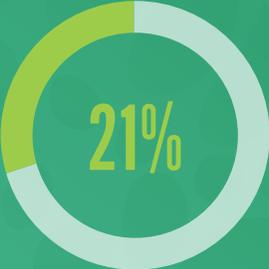
Response number: 1



8

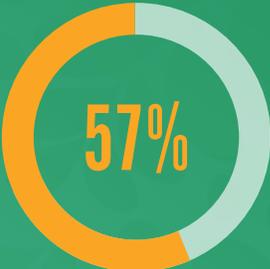
Have you made any changes to your GM policies to specifically promote sustainability?

Yes, we've made changes to our policies to address sustainability



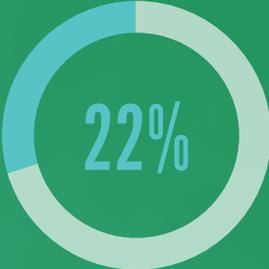
Response Number: 29

We haven't made changes yet, but are planning on revising our policies to address sustainability in the next year



Response Number: 77

We haven't made changes yet and don't have plans to revise our policies to address sustainability in the new year



Response Number: 30



We are currently implementing a policy which prioritizes housing. So the first priority would be for the assignees to live in furnished accommodation; unfurnished (and with it higher relocation volume) only if no other options are available.



9

Is your Global Mobility program taking any of the following steps to address sustainability?

	Already Implemented	Actively Considering	Not Considering
Downgrading class of travel (e.g., offering economy class flights to employees who might have previously qualified for business class)	22%	25%	53%
Encouraging less travel (e.g., fewer business trips, fewer flights)	34%	34%	32%
Paying lump sums in lieu of transporting personal belongings via shipment	32%	32%	36%
Renting furnished accommodation in the host location as default choice (to avoid the need to transport personal belongings from home to host)	20%	49%	31%
Renting furniture in the host location (to avoid the need to transport personal belongings from home to host)	19%	42%	39%
Paying a lower utilities budget to encourage efficient use	9%	18%	73%
Paying transportation allowances in lieu of providing physical cars	31%	26%	43%
Encouraging assignees to find accommodation within easy reach of the workplace via public transport (to avoid the need to drive)	22%	31%	47%



Only hybrid or electric cars in local lease policies.



Offering Discard and Donate where available to reduce shipments.

10

Have you seen changes in the types of assignments being used in response to sustainability (e.g. fewer commuter assignments, more virtual assignments, etc.)?

	Response #	Response %
Yes	22	16%
Somewhat	42	31%
No	71	53%
Total	135	100%



11

Have your assignees/transferees taken an active interest in how GM is addressing sustainability?

	Response #	Response %
Yes, we often receive questions or inquiries about sustainability from our assignees/transferees	7	5%
Somewhat, we receive some questions and inquiries about sustainability	28	21%
No, we rarely or never receive questions or inquiries about sustainability from our assignees/transferees	101	74%
Total	136	100%



We've introduced the option for assignees to select an allowance in lieu of shipment/physical car. The final decision is made by the assignees.

12

To what extent does sustainability influence day-to-day decision making in your Global Mobility program (e.g. considering demographic criteria when selecting candidates for assignments, etc.)?

Major influence



Response Number: 4

Moderate influence



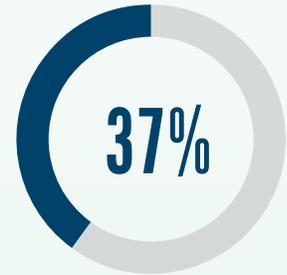
Response Number: 27

Minor influence



Response Number: 53

No influence



Response Number: 50



Our experience with implementing sustainable alternatives is a bit ambiguous: assignees in our organization want to choose sustainable alternatives mostly if it does not affect their overall lifestyle, or if it does not result in financial loss.

13

Are you currently requiring your suppliers to meet sustainability requirements?

	Response #	Response %	From AIRINC's 2021 Sustainability Pulse Survey
Yes, sustainability targets are built into our vendor contracts	18	14%	12%
No, but we intend to include sustainability in vendor contracts next year	39	29%	16%
No, but sustainability credentials are taken into consideration when selecting vendors	46	35%	36%
No, we don't consider sustainability credentials when selecting vendors	27	20%	28%
N/A, we are not focused on sustainability	3	2%	8%
Total	133	100%	100%

If you're including sustainability requirements in your vendor contracts/proposals, what criteria are you requiring?

The following themes emerged from the comments:

REPORTING OF EFFORTS

"Reporting on efforts suppliers are taking and impact"

"Suppliers to evidence what actions they are taking to drive sustainability in their company."

CO2 TRACKING

"Carbon reporting, recycle content"

"Compensating carbon spending"

"KPIs for CO² emissions. Inclusion of living wage salaries. Some kind of KPI for renewable packaging materials"

"Reduced carbon emissions from our shippers and DSP's"

"Reduction of emissions were possible, alternatively proof that emissions are being offset."

CERTIFICATION AND AUDITING

"Certification/audit based on standard sustainability audits, this is done by our procurement department, GM is not actively involved"

"We expect suppliers to meet the expectations set forth in this Code of Conduct by adopting management systems in their respective enterprises that facilitate compliance with relevant laws and achieve continuous improvement."

"Vendor certification"



15

Are you currently tracking or measuring Global Mobility's effectiveness in addressing sustainability? [Select all that apply]

From AIRINC's 2021 Sustainability Pulse Survey

	Response #	Response %	
Yes, we are actively tracking	10	8%	4%
No, but we intend to start tracking in the next year	23	17%	12%
No, we would like to track sustainability, but don't have the tools available	41	31%	26%
No, we would like to track sustainability, but don't have the capacity to add this to our workload	29	22%	21%
No, we encourage sustainability but don't intend to track it	36	27%	33%
N/A, we are not focused on sustainability	10	8%	11%
Total	149		



Sustainability Philosophy

16 In your opinion, how achievable is a “net zero” sustainability goal for organizations with global mobility programs?



17 Does increasing sustainability necessarily mean increasing financial cost to the organization?

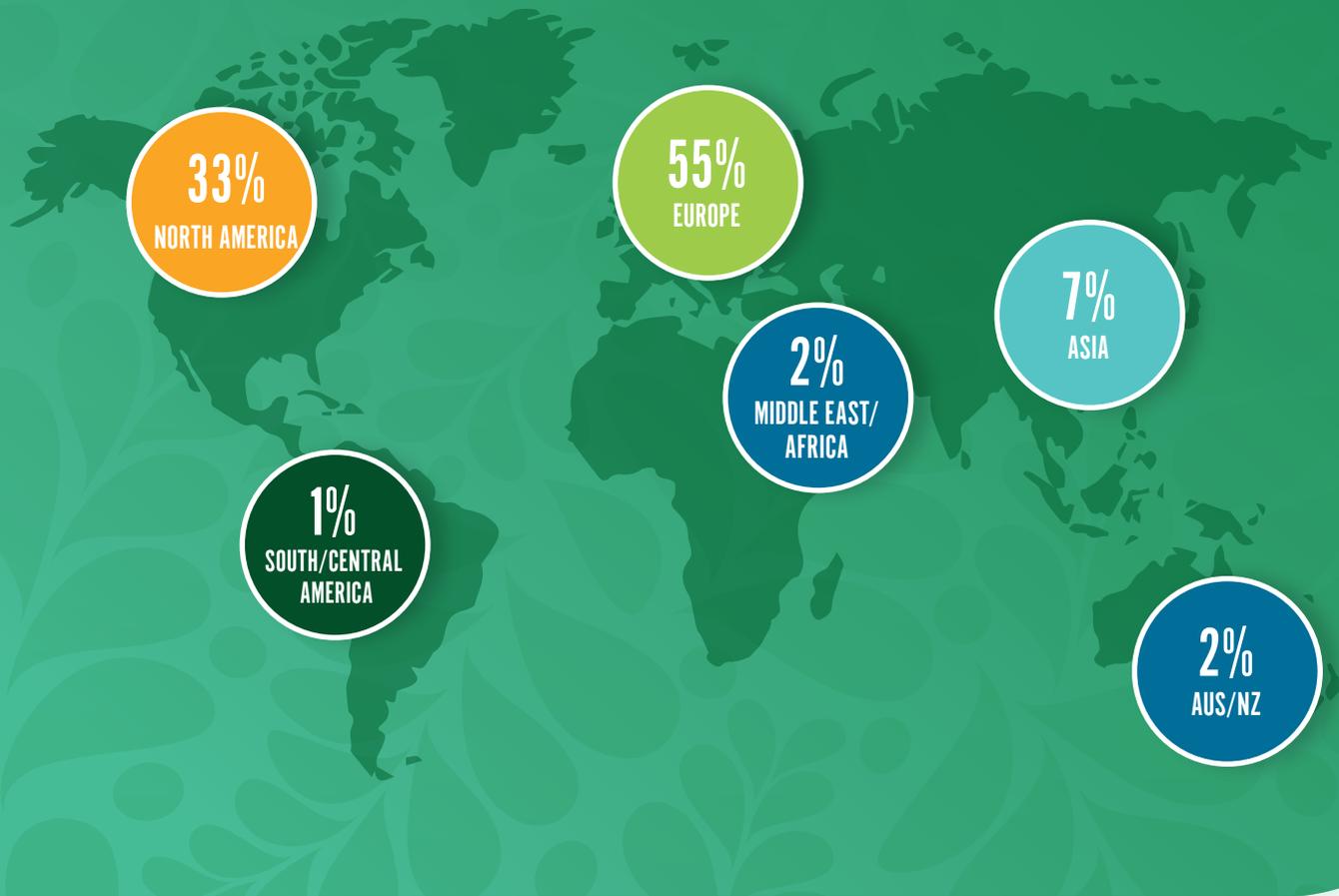
	Response #	Response %
Yes	19	14%
No	60	45%
Unsure	54	40%
Total	133	100%



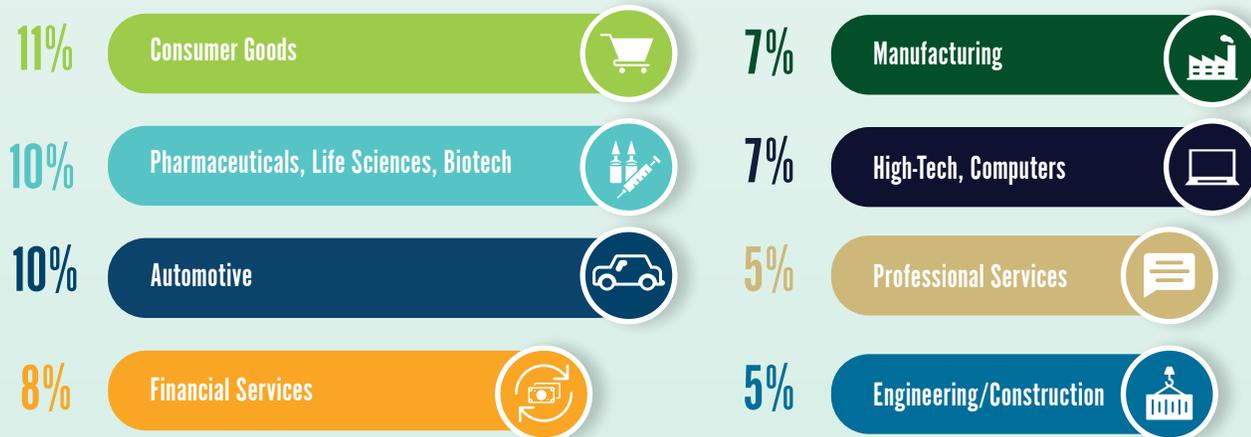
[Sustainability] is a change of mindset evolution, not just a project with final solutions [presented] on a tray.

About the Survey

HEADQUARTERS REGION



Top industries represented



Partial List of Participating Companies

abrdrn PLC
adidas
ADP
Aegon N.V.
African Development Bank
Air Liquide
AIRINC
Alfa Laval
Allnex
Alstom
AMBER Lodging Co.
American Express
Anglo American
Aon
ARaymond
ARC
Arup
Atkins, Part of the SNC-Lavalin Group
Bayer AG
BD
Beam Suntory Inc.
Berkshire Hathaway HomeServices
Alliance Real Estate
bioMerieux
BMW Group
Boehringer Ingelheim
Boeing
Bourns, Inc.
bp
Bristol Global Mobility
CapRelo
Caterpillar, Inc.
Chester County Aviation
Coca-Cola
Columbia Asia
Crown Worldwide
Danish Crown A/S
Dell Technologies
DEME
DENSO International Europe
DSM

Ecolab
ERM
Evonik Industries
Expat Communication
Excientia
Ferring Pharmaceuticals
Flushing Company
Fonterra
Ford Motor Company
General Motors
Gensler Europe
Getz Healthcare (Philippines), a
division of Getz Bros. Philippines, Inc.
Graebel Relocation Services
Worldwide
GROUPE ATLANTIC
GSK
HFHI
Jardine Matheson LTD
Kellogg
Keppel Corporation LTD
KRONES AG
KWS
LIMAGRAIN
Mars Inc.
McDermott
Michelin
Micron Technology Inc.
MOL Plc.
Mondelez International
MOVING-ON
Norwegian Refugee Council
Novo Nordisk
Nutrien
OMV Aktiengesellschaft
Ontario Teachers' Pension Plan
Pearson
Pfizer Inc.
Pinsent Masons LLP
PMI
Publicis Groupe

QIAGEN
Rabobank
Reckitt PLC
Reloquest
Renault SAS
Riley and Company Inc.
Rio Tinto
Roche/Genentech
Rolls-Royce
SC Johnson
Shell
Smith & Nephew
South32
Stripe
Swiss Re
Taco Bell
Takeda
TC Management Services Corporation
Sdn, Bhd.
Temenos
UCB
Unity Technologies
UPS
Vanguard
Viatris Inc.
Volkswagen AG
Walltech A/S
Westpac

