

DIGITAL FUTURES IN THE CONSUMER SECTOR:



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INTRODUCTION: TIME TO BUILD DIGITAL EXPERTISE



Digital connotes deeper interactions with customers, more customised and personalised offerings and interactions, data driven decision making, and an organisational model and processes which are more nimble and reactive to changes in the company's environment.¹

Digital channels are commonly used to advertise and sell products and engage with customers, yet despite increasing investment in digital marketing in recent years, companies in the consumer sector are still trying to work out how to use digital effectively.

It's true that many consumer businesses have actually been slow to implement digital in their marketing strategies. Yet as more data becomes available that highlight a direct positive correlation between customer exposure to digital marketing, sales and brand awareness, there is an urgency for consumer firms to start investing time and money into getting digital right.

A key factor that will dominate the digital agenda at consumer companies over the next few years will be making sure that talent strategies are focused on building digital expertise, across the business. But what does a digital leader look like? How

is a digital team structured? Where does digital fit into wider business strategy?

In this report we look at the extent to which businesses in the consumer sector have embraced digital – in terms of leadership, organisational structure, strategy and investment. We surveyed over 100 senior executives from international consumer businesses and conducted in-depth interviews with three digital industry experts.²

The questions and discussions focused on the following topics: What skills and attributes make a good digital leader? How sophisticated is the digital function of consumer businesses? How are digital teams structured? How is the success of digital measured? What digital strategies are businesses adopting? How well is the digital role defined? Is there a shortage of people with the necessary skills to drive digital change?

¹ www.123socialmedia.com/social-media-strategy/

² Nigel Wright would like to thank the following people for their support with this project: Minal Shah, Mette Nøhr, Franck Grevet, Mats Ronne, Thomas Hobel and Tim Leigh.



1. DIGITAL LEADERSHIP



COMMERCIAL PLUS INTERNET

The economic crisis was a catalyst for many traditional consumer companies to start investing in building digital capability to drive sales and customer engagement in a cost efficient way. The reality though was that consumer firms should have been doing more, prior to the recession, to develop digital channels. Consumers want to buy online but many traditional consumer companies have ignored this trend and allowed pure plays such as Amazon and Play.com to gain market advantage.³

An industry expert explains: "Not everyone in the consumer sector has been convinced of the true potential of digital. Categories such as clothing and furniture for example – items where there is a perception that customers will want to try-on, touch or feel a product before buying it – have been slow to catch on to the digital trend.⁴ The perceived need for online and mobile channels has been lacking when the reality is that online and mobile sales for products in these categories, on pure play sites, is very strong." ⁵

Obviously, not all traditional consumer companies have been slow to react. In the UK Tesco, Argos, John Lewis and Marks & Spencer have all successfully created high performing digital channels.⁶ One expert noted that big companies that have the resources to invest heavily in their online businesses are starting to get results from digital. Others however have struggled to make a seamless transition between the offline and online models. Speaking to experts in the market, it appears that finding the right talent and making sure that the right people are doing the right jobs, have been ongoing issues.

According to a Nordic based ecommerce expert: "what you tend to find is that the people running ecommerce and digital marketing departments have never worked for an online

business and therefore lack the skills necessary to make online work. A lot of companies get this wrong and put marketing and project people in charge of digital channels. Digital isn't a project, it should be viewed as a separate business and have individuals with strong sales and online backgrounds leading it. They need to be able to view both on and offline together and ensure that the offline behaviours of customers form part of the online strategy."

Pure plays have been able to gain an obvious advantage by hiring people who have an intimate knowledge of doing business online. A key part of this is the effective management of data; as one Digital Project Manager explained: "Engaging with customers online provides businesses with enormous amounts of data. Traditional consumer companies are collecting this data but still don't really know how to use it effectively. They're not making the links between customers' on and offline behaviour."

Internet pure plays typically hire very analytical people who posses a good working knowledge of data management and how to use it to target customers. Their employees, however, often have very little experience in traditional retail, product development or customer service. Workers at traditional consumer product or retail businesses, on the other hand, have very strong brand, merchandising, customer service and product development backgrounds and expertise, but in many cases, lack the capability and online experience required to create robust and efficient digital marketing channels.

If the traditional consumer companies want to be as effective and credible as pure plays, it is essential that they start hiring the right talent. Experts believe it is clear what this talent must look like: "a digital leader must know distribution and sales and also how to plan strategically to sell goods through new channels.

³ Pure plays also don't have conflicts with other channels. Some of the traditional retailers that have tried to establish online channels have found they are restricted in what they can do, in terms of promotions and discounts etc. This often prevents them from being competitive online. There is a fear of 'cannibalising' their offline business if they introduce and invest in online. For example, in the online market a product might have a lower value than it does offline and therefore it contributes to bringing prices down. It is a mistake to deliberately keep your prices high offline and companies that aren't willing to compromise, fail. [Expert view]

⁴ H&M, Gap and Zara, until fairly recently, didn't even have an online channel - H&M only launched its ecommerce business in late 2010 as they didn't think that their customers would want to buy clothes via other channels. [Expert view]

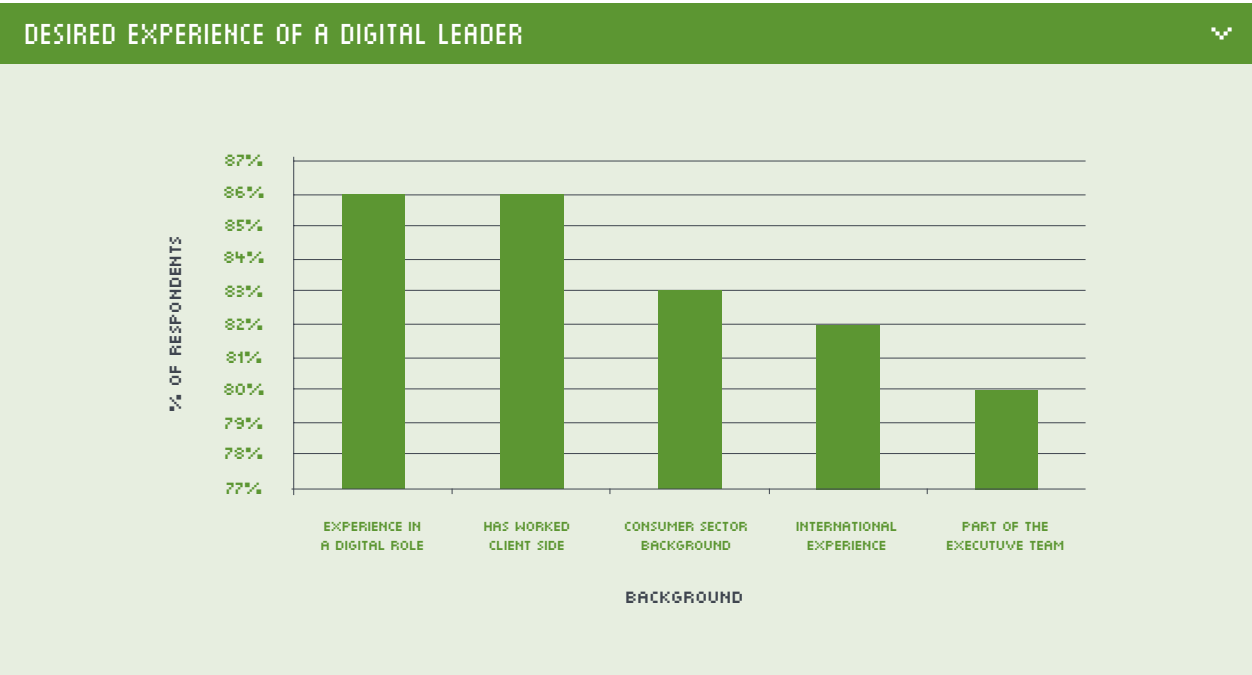
⁵ Some retailers such as Primark, however, have chosen not to invest heavily in digital. They are still growing rapidly and as one expert noted "...believe that it is easier and also more lucrative to open stores in city centres than it is to invest in online." Other companies such as Ikea have also largely ignored digital because of the operational complexities of setting up an efficient ecommerce channel to include delivery etc. Although you can buy Ikea products via its UK website, this service isn't available across the rest of the world. In 2007 the company announced that it did not intend to invest any more in developing its online channels, but instead would concentrate on making the in-store experience better for customers.

⁶ www.digitalstrategyconsulting.com/netimperative/news/2011/05/top_100_online_retailers_in_th.php



This requires a strong commercial background with a good understanding of the mechanisms of the internet and the way that consumers engage with products both online and offline. Ideally, you need people who have worked in the internet industry and who have conducted business online for a number of years."

Eighty six per-cent of respondents to our survey felt that an individual leading the digital function of a consumer business should have previous experience of working in a digital marketing or ecommerce role, client side, rather than for an agency or in advertising. They were less interested in their previous experience as an executive leader.



SERVICE MINDED COLLABORATOR

The playing field is changing however, as on and offline companies begin to understand the nature of consumer 'multichannel' habits.

A recent study by UK based insight agency Shoppercentric, for example, highlighted that 87% of shoppers still visit stores when planning purchases.⁷ In the last few months we have heard rumours that Amazon will open a 'bricks and mortar' store in the USA to see if it can compete with its traditional offline rivals on the high street.⁸ Last year in Korea, Tesco projected a virtual store onto a subway station wall allowing shoppers to order products on their phones by scanning QR codes.⁹ A similar venture was also launched in Prague between MALL.CZ, and consumer product giant P&G.¹⁰

It is important to remember that the first example hasn't happened yet and engagement with the latter two innovations, although growing, is still marginalised compared to visiting and buying in-store or using a desk top computer.¹¹ What is

significant though is the fact that companies are getting smarter at identifying 'customer experience' as the key factor driving digital strategy.

Experts believe this is where traditional consumer companies can gain an advantage over pure plays. Companies that started out offline have a lot of experience in creating excellent customer service experiences for customers. Companies that start online but don't invest in creating adequate service channels often fail. *"It is important to get customer service right online, you need to have employees in the store all of the time, even if it's virtual. People increasingly expect the same level of service they receive offline, online – they want quality, cost effective and easy to use platforms."*

One expert noted that Amazon is the 'gold standard'¹² of online customer service but others have so far failed to match them: *"I would expect more online business models to try and emulate Amazon. I think a lot of on and offline companies have tried to set up ecommerce systems too quickly and are still experiencing problems."*¹³

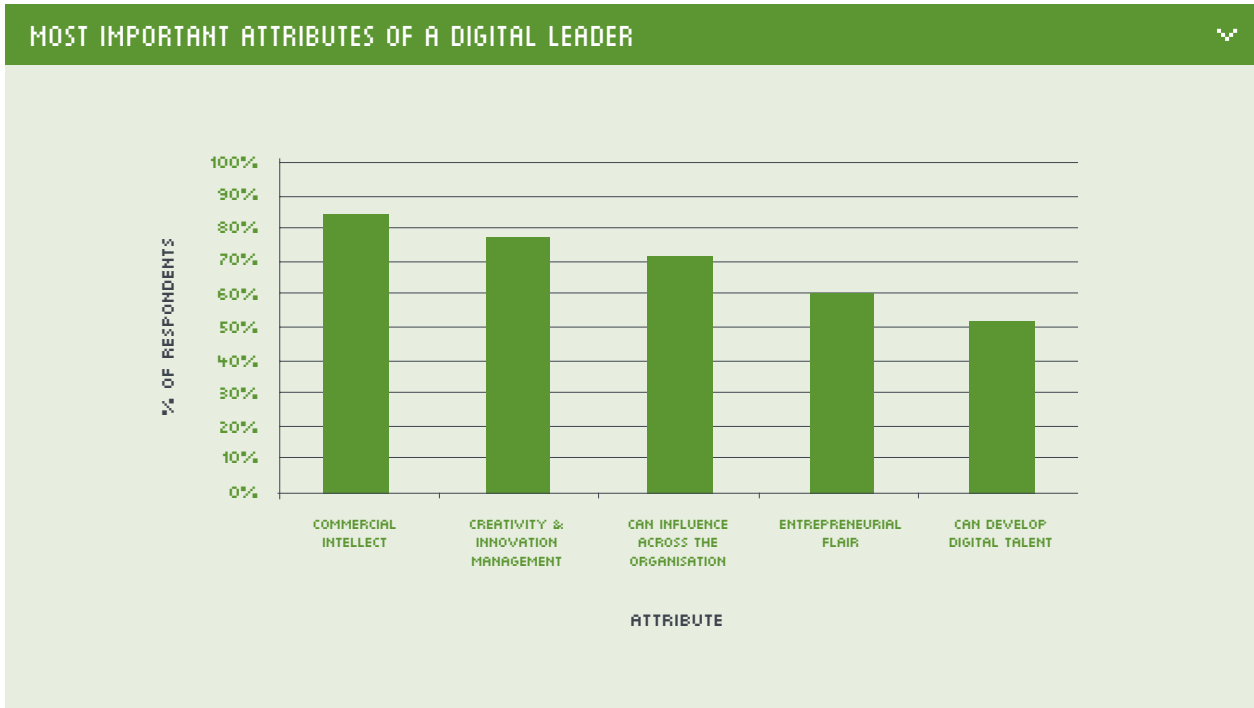


Traditional offline consumer companies are realising that digital channels allow them to get closer to their customers, and the digital segment will increasingly be based around the customer experience. *"Each individual interaction will be different for each consumer depending on their tastes and habits. This information should then be made immediately available to customer service people, either in-store or online, so they know how to manage each customer's expectations."*

Experts agree that this kind of system is still fairly rare: digital and ecommerce still have a long way to go in terms of becoming more sophisticated and 'slick' marketing and sales channels. *This is even the case for the companies that are currently doing it well. Digital leaders therefore need to have the capability and*

*experience of both on and offline consumer marketing to make a real impact."*¹⁴

Furthermore, if digital strategy is to become more aligned with overall business strategy, greater collaboration is needed with stakeholders across the business to communicate the opportunities that digital can offer. Seventy one percent of respondents to our survey identified 'ability to influence across an organisation' as a key attribute of a digital leader. Interestingly, respondents did not identify analytical skills as being one of the most important attributes of a digital leader. Commercial intellect, innovation management, entrepreneurial flair and talent development skills were perceived to be the most important characteristics.



⁷ www.econsultancy.com/uk/blog/9152-the-high-street-is-central-to-multichannel-retail-strategy

⁸ Customers will still expect to engage with products online, in-store. www.econsultancy.com/uk/blog/8940-amazon-rumoured-to-be-opening-shop-on-the-high-street?utm_medium=email&utm_source=daily_pulse

⁹ www.telegraph.co.uk/technology/mobile-phones/8601147/Tesco-builds-virtual-shops-for-Korean-commuters.html

¹⁰ www.thegrocer.co.uk/companies/pg-rolls-out-virtual-store/223060.article

¹¹ www.econsultancy.com/uk/blog/9152-the-high-street-is-central-to-multichannel-retail-strategy

¹² In the Nordic region, a contributor to this research explained that Wupty, which is the Nordic equivalent of Pixmania (consumer electronics pure play) and Telmore, a telecoms pure play, are particularly innovative.

¹³ Last year Marketing Week reported that 'collaborative filtering technology' which Amazon uses to develop automatic recommendations for customers based on their purchase history data, is something that many consumer brands and retailers have not yet taken advantage of. www.marketingweek.co.uk/big-data-embracing-the-elephant-in-the-room/3030939.article

¹⁴ According to one expert, the UK Grocery market is particularly advanced in terms of its online model with many of the big supermarkets experiencing high volumes of sales online. In Denmark however there are only a few small players in the grocery market that have launched an online business. The picture is the same with the Insurance market: Around 70% of insurance in the UK is sold online compared to only 6-7% in Denmark. [Expert view].



2. WHERE DOES DIGITAL FIT?



"DIGITAL MARKETING IS STILL IN ITS INFANCY BUT IS ALREADY A TOOL THAT COMPANIES MUST SEEK TO INTEGRATE INTO THE WIDER BUSINESS STRUCTURE."

CEO, FRENCH ELECTRONICS PURE PLAY BUSINESS.

Almost 50% of respondents to our survey suggested that digital was 'clearly defined with long term, measurable objectives' at their company. On the contrary, however, 71% would only describe their digital marketing infrastructure, including organisation and leadership, as fairly sophisticated or not sophisticated at all. This clearly indicates that for many businesses, although they have a definite plan for digital, they are still not comfortable with aspects of how it is integrated into the wider organisation.

One expert explained, "because digital is still a fairly new concept for many businesses, a lot of companies are still testing which part of the structure it fits best." Most respondents indicated that digital was currently part of the marketing department. A major supermarket, however, indicated that digital reported into retail operations, while other companies we surveyed said it was a sales function. Thirty two percent of the companies in our survey didn't believe it should be an extension of a commercial department at all and many of these companies saw digital as a department in its own right, while others thought it should be devolved across the business.¹⁵

Significantly, the 29% of respondents surveyed that indicated the digital infrastructure at their business was either very or highly sophisticated, in the main, were from companies that recognised digital as a senior executive function. Talking to experts in the market, it is clear that certainly within the context of the

consumer industries, this is where digital should be. Only 11% of the companies we surveyed, however, currently have a digital functional head reporting directly into the CEO; as few as 3% have a digital board director.

According to our experts, traditional retailers for example, seeking to succeed online, need to position their digital channel at the same level with the same strategic focus as their offline channels. "The digital or ecommerce director needs to be given the necessary power and autonomy to realise the full potential of digital. In terms of structure therefore, the head of the digital or ecommerce business needs to be a VP. Another expert argued, if a business decides its digital channel is significant then it should have a digital ambassador on the board."

Centralisation and integration were also common themes that came out of our research. "Deciding where digital sits really depends on what type of business it is. My personal view is that you should try to centralise digital and ecommerce as much as possible and then have category managers engaging with the different business units." Other experts pointed out that traditional retailers that are succeeding online have established one channel, with one team, and then have worked hard to integrate as much of the offline channel into it as possible.¹⁶

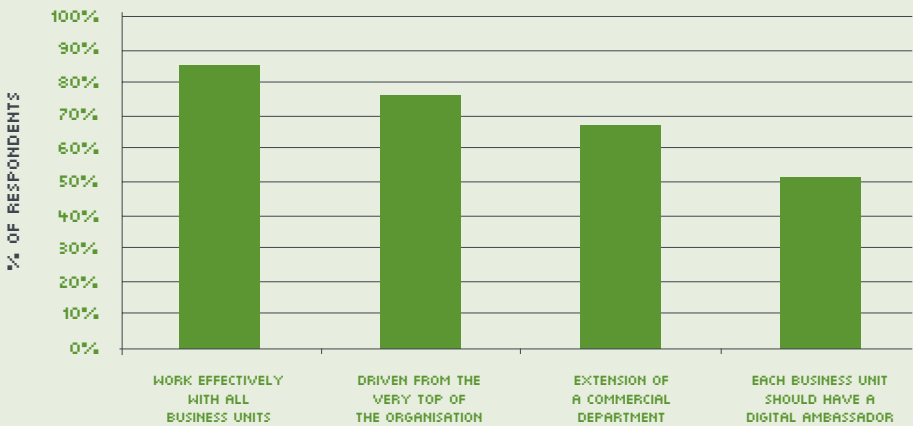
Interestingly, respondents to our survey discussed the issue of 'over complication' as being a major drawback for businesses

¹⁵ One global insurer we spoke to said that during a restructure, digital had recently been moved away from marketing and into a defined team in the change and technology area. [In 1996 it was the first insurer to offer purchase of insurance online. It also developed 'web chat' as a customer communication tool 10 years ago. The business has a very innovative approach to customer interaction via digital channels e.g. online claims, preauthorisation of treatment via mobile devices and mobile insurance cards.

¹⁶ For example, they are putting online devices into shops and having less products in-store. Instead customers can browse products in-store, online and order them. A good reason for traditional retailers to do this is because they often struggle to compete online against pure plays so they utilise their store assets to be creative, and take on the pure plays in an environment where they don't exist. [Expert view].



WHERE DOES DIGITAL FIT IN?



trying to decide where digital 'fits' and how it should engage across the business.

As digital becomes more accepted and integral to the operations of consumer companies, many believe that a more pragmatic approach to integration will emerge. "I think that treating digital as a separate entity to marketing and commercial, in the first instance, makes it seem like a more complex and difficult beast. As a starting point, it should sit as part of the wider marketing mix and be incorporated, as part of the route to market." Another respondent was concerned about the 'debauched vocabulary' and 'false specialists' that have attached themselves to digital which, in their view, "undermines its understanding and integration across all functions of the business, whether they're using it to contact customers or suppliers."

To overcome these problems, the future of digital, according to experts, relies on a gradual transition from being the bottom-up responsibility of the 'technocrats' to a situation where it is 'truly

owned' by the executive functions. Defining a digital strategy is necessary but some argued that it is important not to forget that the mission of digital marketing is to communicate and create affinity between the company and its customers. To do this effectively, the general consensus was that digital therefore must ultimately be a specific department of the company, able to work harmoniously with other services.¹⁷

When we asked the market what it felt digital would look like in the future, however, the result was somewhat different. Seventy percent of respondents to our survey felt that eventually, digital would be integrated into all business units. We can deduce from this that many consumer companies see the evolution of the digital channel as something that will require executive leaderships to drive its initial development. In the long term, however, the aim of the strategy should be to provide business units with the necessary skills and autonomy to utilise it for their own purposes.¹⁸

¹⁷ As one industry expert noted: "In many cases digital isn't really part of the marketing budget anymore – it's a separate business channel, part of overall business development investment."

¹⁸ An E-Business Director of a large consumer firm provided a useful example of this. "Getting digital to collaborate with all internal stakeholders should be an integral part of any business moving forward. We currently have over 100 digital projects on the go. In the last six months, more investment and general interest from across the business has occurred. This makes me think that there probably won't be a digital unit here in 10 years – it will be seamless across all aspects of the company with maybe one or two digital experts; but not a whole department."



3. DIGITAL STRATEGIES AND HOW THEY'RE MEASURED



The majority of companies surveyed spend between 0 and 39% of their marketing budgets on digital. There was no correlation between digital marketing spend and turnover, with companies investing varying amounts on digital, regardless of size. Over 50% of respondents indicated that digital was considered to be very important at their company and also the demand for digital investment, overall, was strong – 87% said investment in digital had increased over the last 24 months and no one indicated that there had been a decrease.

Interestingly, experts we spoke to and also those who completed our survey had strong opinions about the focus consumer businesses should be giving to digital marketing. Most felt that companies should be doing more to perfect their digital marketing channels; one individual described those that were not as 'running a high risk'. The statement that 'consumer businesses must increase investment in digital infrastructure if they want to survive' prompted 77% to either agree or strongly agree; however only 29% think not having a 'well defined digital strategy' gives businesses a commercial disadvantage.

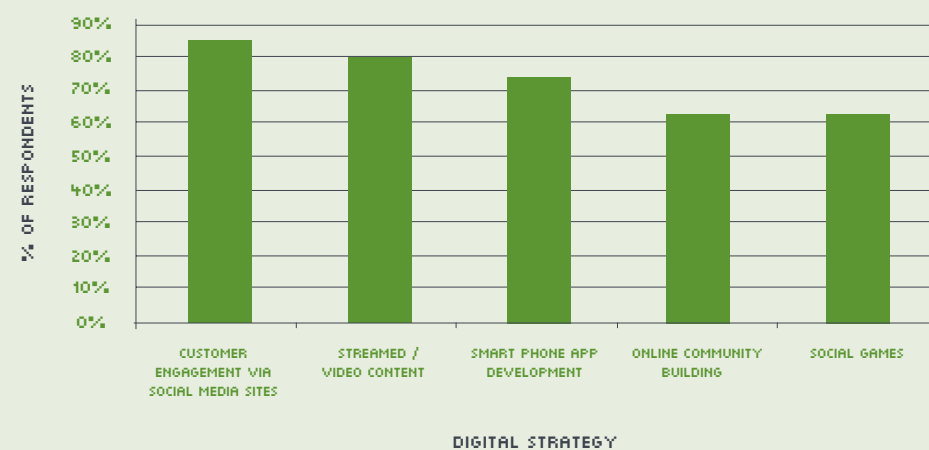
INVESTMENT AND TRENDS

Some of the key trends driving investment in digital marketing include social media, m-commerce and video. Over 70% of survey respondents anticipate increased investment in these areas of digital over the next three years.

Many research consultancies are highlighting the fact that social media is essentially driving online consumption.¹⁹ According to Gigya, a social integration platform developer, two thirds of retailers either offer or plan to offer visitors the ability to use Facebook to log in to their e-commerce sites.²⁰ Experts we spoke to however highlighted that most companies have yet to work out how to really make social media work; as one individual noted "it's also very expensive and difficult to measure."

"Social media, however, is not really about getting people to buy things but more about building brands and creating a two-way relationship with customers." What we are beginning to see more of is consumer brands and retailers using social media to listen to customers, promote products, increase brand loyalty, and provide customer service.²¹

INCREASED INVESTMENT IN NEXT 3 YEARS



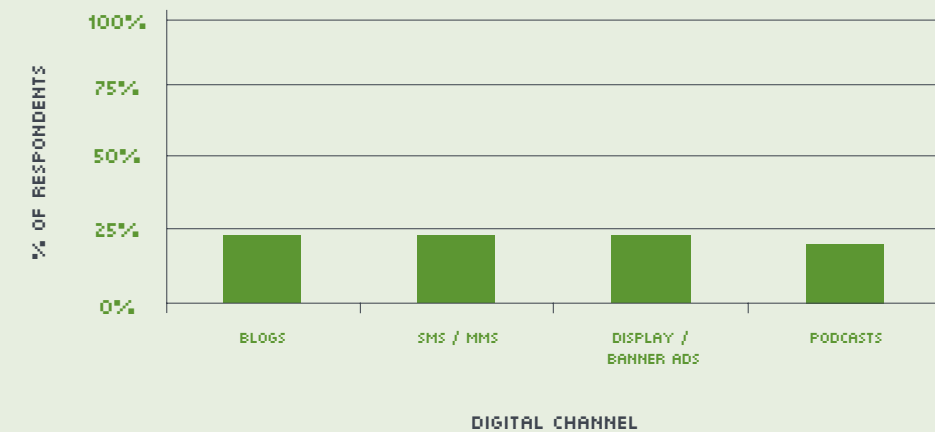
¹⁹ www.gridleyco.com/what-we-think/overviews/e-commerce-industry-overview/

²⁰ www.internetretailer.com/2010/12/30/have-social-and-mobile-new-year

²¹ www.gridleyco.com/what-we-think/overviews/e-commerce-industry-overview/



MOST LIKELY TO SEE DECREASED INVESTMENT



Mobile commerce or m-commerce is slowing catching up with traditional e-commerce models. According to MEF, consumer engagement with m-commerce is particularly high in the UK with as many as 91% of UK consumers indicating they have used their mobile device to research or purchase products. None of the other countries surveyed by MEF had mobile engagement below 72%.

Big consumer brands such as Starbucks and Disney have been particularly innovative in developing m-commerce capability. In terms of mobile payments Starbucks is the 'worldwide leader'. Its point of sale mobile technology, linked to Starbucks card accounts, has helped to drive mobile purchases. Disney has also experienced success in this area. Experts commented that digital platforms such as mobile, pads and digital TV – or 'new screens' – are all tools to help brands "market to consumers all of the time, wherever they are" and that is why companies are investing heavily in developing capability in this area.

The trend that perhaps links social media and m-commerce is video or 'streamed content' via new screen technology. In our survey, 80% of respondents recognised this as a growth area. Other research has shown how products can experience significant gains in conversion rates, through video promotions via m-commerce channels.

While these are key digital platforms that are gaining greater influence within consumer digital marketing strategies, at the same time R&D is occurring on the actual channel itself. Experts explained that in the next few years we will begin to see more sophistication in analytics, which allow companies to see detailed customer activity in all digital channels, allowing them to act on it immediately. "This will basically be a knowledge generator to inform customer segmentation. Then tools such as social, video etc. can be used to drive traffic to your sites."

In our survey respondents believed we are most likely to see a decrease in investment over the next three years in blogging, podcasts, SMS and display and banner advertising.

²² Last year eBay released data that suggested mobile shopping could be worth £4.5bn to the UK economy by 2016.

²³ www.mefmobile.org/news/mef_news/consumers_embrace_mobile_commerce_globally/

²⁴ Brazil, Egypt, India, Indonesia, Qatar, Singapore, South Africa, UK and USA

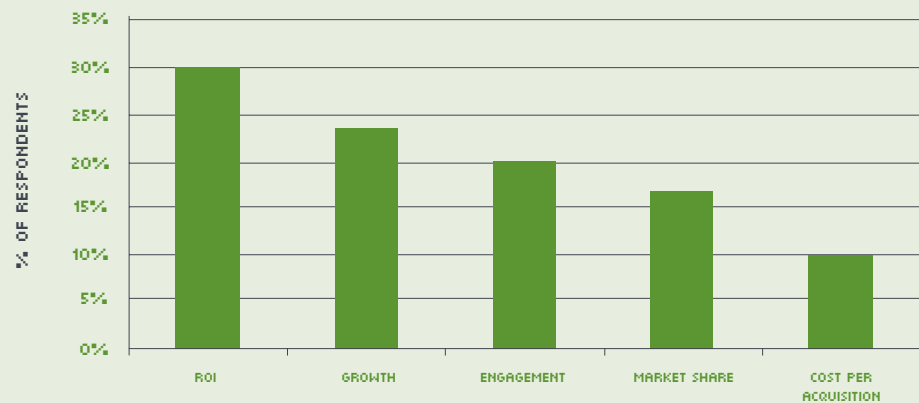
²⁵ www.mobilecommercedaily.com/2012/01/31/starbucks-exec-says-retailer-is-worldwide-leader-in-mobile-payment-transactions-dollars

²⁶ www.mobilecommercedaily.com/tag/disney

²⁷ www.econsultancy.com/uk/blog/6834-why-etailers-need-product-videos



HOW IS DIGITAL IMPACT MEASURED?



MEASURING SUCCESS

Measuring the success of digital channels such as social media and video etc. is still an emerging and unperfected skill. Experts we spoke to, however, noted that there are some companies that are beginning to refine the art. Grocery companies for example, according to one industry commentator, are particularly good at this. *"Tesco attribute online sales back to the local store giving the local store the autonomy to invest in online promotions. They are also one of a selection of companies that measure ecommerce sales separately from offline sales."*

Some businesses also measure the cost reduction that the online channel creates, *"being clear on how you reduce cost by having*

certain products and services available online." Businesses with large contact centres for managing customer interactions, for example, are *"defining and measuring the 'cost reduction' they achieve through the provision of effective online support."*

Furthermore, businesses that have mature online operations are measuring the online business with the same KPIs as the offline business: *"sales volume, profit, costs structure and the business that is being created."*

Return on investment is the measure most commonly used by companies in our survey to determine the impact of digital. Growth and engagement were also considered important.



CONCLUSIONS

Digital can mean different things to different businesses. For some small businesses it is currently 'the website', used to advertise products and services, while for others it is a far more sophisticated channel that impacts a wider range of marketing 'tools' in the mix. Regardless of company size, however, consumer companies need to determine how far down the digital route they want to go and then maximise its use to improve relationships with customers and create robust and meaningful online experiences.

This can be achieved by investing in digital infrastructure, identifying and hiring the right talent and introducing the right kind of leadership to drive digital change across the business. Below are the conclusions and final thoughts on each of these critical areas.

INVESTMENT

Experts we spoke to emphasised that there is still a lot of naivety about the importance of online to consumers. At the same time it is not prevalent enough across all categories, for some business to see it as an essential channel. As engagement with traditional media continues to decline, however, more companies will look to increase spending on digital; in terms of investment in the channel itself and investment in the strategies to promote the channel. In our survey, 77% of respondents agreed that consumer businesses must increase investment in digital infrastructure if they want to survive.

TALENT

A key issue is the lack of talent in the market capable of leveraging the opportunities digital can offer to traditional

consumer businesses. Ultimately, as this research has highlighted, businesses will begin to see the value in hiring analytics experts, with pure play backgrounds, rather than relying on traditional marketers to lead the digital function. A problem, however, is that this kind of talent is rare, especially in Europe. Those that completed our survey largely (72%) agreed that there is a shortage of people with the necessary skills to drive digital change in the consumer industries. Industry analysts have noted that part of the problem is a lack of high level digital training within universities.

LEADERSHIP

While the ideal digital leader will bring the qualities and skills from both on and offline businesses, it is essential (83% of survey respondents agreed) that they can develop digital expertise across the business. A further 75% recognised developing analytical skills as a key part of this. Some of the main areas of focus for digital leaders will be around analytics and information gathering, deciding how on and offline sales are going to be divided as well developing digital customer service expertise. For those factors to work, digital strategy should be aligned with overall business strategy and driven from the top of the organisation.

The conversations that have informed this research have highlighted that although there are some companies that are truly innovative in terms of digital capability there is still a lack of good case studies in the consumer sector of digital working well. Experts generally agree that there are still too many companies applying offline rules to online, when the environment is very different.

"WHILE THE IDEAL DIGITAL LEADER WILL BRING THE QUALITIES AND SKILLS FROM BOTH ON AND OFFLINE BUSINESSES, IT IS ESSENTIAL THAT THEY CAN DEVELOP DIGITAL EXPERTISE ACROSS THE BUSINESS."



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