THE FUTURE OF SUSTAINABLE SOURCING

LUXURY'S GUIDE TO COLLABORATION,
INNOVATION AND BEST PRACTICE

Positive Luxury

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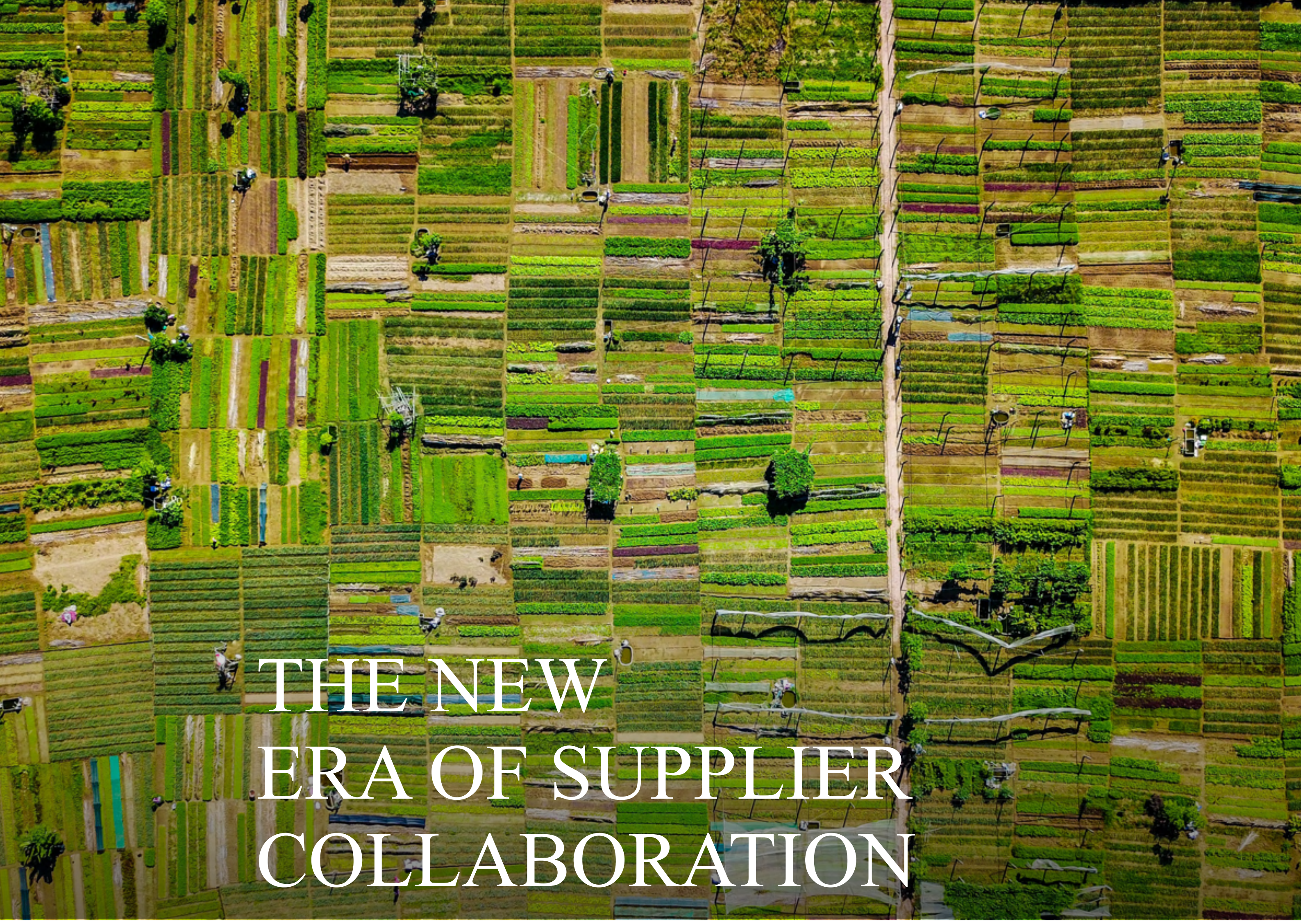
ABOUT POSITIVE LUXURY

Since 2011 Positive Luxury has been helping organisations adapt to the new climate economy. We developed ESG+, a proprietary sustainability assessment for the luxury industry with a unique focus on innovation. Organisations that we certify receive the Butterfly Mark, a globally respected trust mark that is independent evidence of their positive impact on nature and society.

Want to find out more? Contact us at **hello@positiveluxury.com**

www.positiveluxury.com



THE NEW ERA OF SUPPLIER COLLABORATION

TRADITIONALLY, SUPPLIERS provide companies with the products and services to manufacture end products. In the luxury industry, suppliers include wine growers, cattle farmers, cotton farmers, gem miners, garment machinists and packaging factories, to name a few. Suppliers, therefore, uphold the luxury market.

However, they are often undisclosed by brands who choose not to declare upstream providers, with the consumption and sustainability practise of these suppliers also typically absent from company comms. It is a significant omission, given that an average of 90% of brand resource consumption takes place in the supply chain[1], with Scope 3 emissions accounting for 80% of a company's greenhouse gas footprint [2].

In the era of accountability and transparency, it is time for companies to internalise their externalities – including their supply chain.

"Brands are under increasing pressure from stakeholders – including the consumer – to ensure that their supply chains are operating to recognised best practices and standards; more and more, we are seeing that there is an expectation from the public for organisations to demonstrate that they are good corporate citizens." Neil Coole, Director of Food and Retail at BSI told Positive Luxury.

Instead of a challenge, brands should see this as an opportunity to formally partner with suppliers, investing in their sustainability efforts to create mutually beneficial relationships. 'Greening' the supply chain is a profitable pursuit; companies that can demonstrate their adherence to ESG goals grow faster and are valued higher than non-ESG-compliant competitors at a rate of 10-20%[3]. In addition, an ESG-compliant supply chain can reduce overall brand expenditure by 5-10%, incentivising investing in supplier sustainability[4].

Beyond ecological arguments, studies have shown that companies with mature, extensive collaboration with suppliers can out-earn those who don't by up to 196%[5].

A partnership model should also appeal to suppliers. Not only does it encourage business transparency, which helps to promote industry-wide regulations and protections, but it opens up new avenues of collaborative investment. Brands hoping to improve their supply chain should be willing to bolster suppliers' sustainability practices through both guidance and financing.

At Positive Luxury, we assess brands and suppliers by their ESG commitments and explore risks across regions. Combined processes provide brands with value chain mapping, ensuring transparency for all parties involved.

It's time to embrace suppliers as partners – not simply sources – and vice versa. By doing so, brands can attain full-scope production oversight that mitigates reputational risk, ensure end-to-end sustainability across the value chain and access new market innovation and opportunity. Meanwhile, suppliers can build a competitive advantage that puts them in pole position in a tender process, increase customer loyalty and enjoy the mid-term benefits in line with their brand partners.

In this report, Positive Luxury presents a good suppliers guide, outlining:

- **Why collaboration between brands and suppliers coupled with fulsome supply chain oversight is a business imperative**
- **What brands should look out for when selecting a supplier**
- **Legislative change that will impact supply chains**
- **Practical guidance on how to foster mutually beneficial relationships between brands and suppliers**

UNDER THE MICRO-SCOPE
UNDERSTANDING SCOPE 1 – 2 – 3 EMISSIONS

SCOPE ONE

Scope 1 emissions are direct emissions from a company and its owned or controlled resources.
i.e. emissions released from firm-level activities

These are divided into four sub-categories of emissions:

- Stationary Combustion, i.e. heating
- Mobile Combustion, i.e. vehicles
- Fugitive, i.e. refrigerant gas leaks
- Process, i.e. from on-site manufacturing

SCOPE TWO

Scope 2 emissions are indirect emissions from a company, generated via energy consumed by a company.
i.e. emissions from purchased electricity, heating and cooling systems

SCOPE THREE

Scope 3 emissions are indirect emissions from a company, which occur along the value (supply) chain.
i.e. emissions from company operations

These are divided into 15 sub-categories of emissions:

UPSTREAM
- Purchased goods and services
- Capital goods
- Fuel/energy-related activities (not covered in scope 1/2)
- Transportation/ distribution
- Operational waste
- Business travel
- Employee commuting
- Leased assets

DOWNSTREAM
- Transportation/ distribution
- Processing sold products
- Use of sold products
- End-of-life treatment of sold products
- Leased assets
- Franchises
- Investments

Source: Greenhouse Gas Protocol

PART ONE:

THE BASICS OF BENEFICIAL PROCUREMENT

POSITIVE PROCUREMENT PROCESSES – WHERE TO START?

For both new and established brands, it can be hard to know where to start seeking ESG-complaint suppliers as the definition of sustainability is blurred by personal subjectivity and international perspectives. A good place for brands seeking sustainability certified operations (see Part Two) to start is the International Organization for Standardization (ISO). Its Sustainable Procurement Guide – the ISO 20400 – advises brands regardless of size or industry on approaching procurement through a sustainable lens.

Once brands have understood this framework, they can consult the British Standards Institution's (BSI) PAS 7000, an internationally recognised framework or standard for evaluating supplier profile, capability and performance, to aid decisions on when to engage suppliers – or not.

TIERS NOT TEARS: UNDERSTANDING SUPPLY CHAIN ARCHITECTURE

TIER ONE

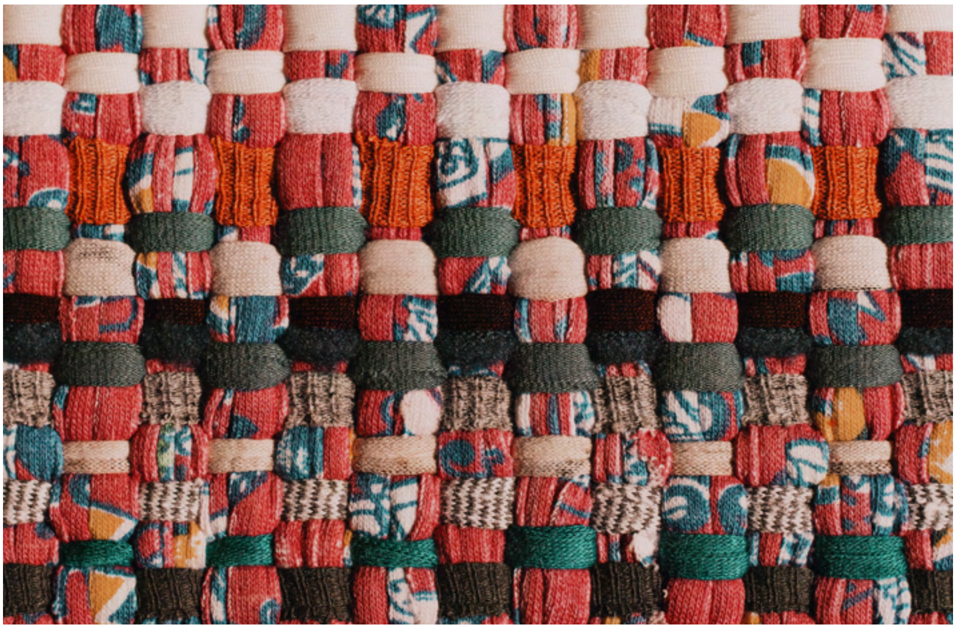
Suppliers that brands do direct business with
e.g. garment manufacturing factories

TIER TWO

Suppliers that tier one suppliers source their materials from
e.g. fabric mills

TIER THREE

Raw material suppliers
e.g. cotton farms



INVESTIGATING INTELLECTUAL PROPERTY IN THE SUPPLY CHAIN

IP laws and supply chains intersect where brands and suppliers risk third parties reproducing signature designs and selling them on the grey market if not protected by copyright or trademark.

In a landmark 2019 case, the Court of Justice of the European Union (CJEU) ruled that the only requirement for European copyright protection is sufficient originality in design. Formerly various countries necessitated a degree of artistic value for copyright to be granted. The CJEU determined that artistic value is too subjective and upheld that all member states must adhere to its requirements for copyright protection. In action, this makes it easier for brands to attain copyright for their designs and therefore provides more security for companies when they collaborate with manufacturers.

Brands can also circumvent IP concerns by formally partnering with suppliers, de-incentivising betrayal of design or proprietary ideas. See Building Branded Supply Chains in Part Three for more.
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> “THE BEST PLACE FOR A BRAND TO START ITS JOURNEY TOWARDS BUILDING MORE RESILIENT SUPPLY CHAINS FOR THE FUTURE IS THROUGH SUSTAINABLE PROCUREMENT”
>
> *Neil Coole, Director of Food and Retail at BSI*

PART TWO:

WHAT MAKES A 'GOOD' SUPPLIER?

> "THE BIGGEST CHALLENGE BRANDS FACE TODAY IS THEIR LACK OF KNOWING THEIR COMPLETE SUPPLY CHAIN STORY"
>
> *Neil Coole, Director of Food and Retail at BSI*

CONSUMER DEMAND FOR TRANSPARENCY

End-users and consumers are becoming more educated on supply chain models, driving the demand for transparency around sustainability and ethics within business practices. Recent research has found that 91% of US consumers now consider a product's supply chain when making a purchase[6]. It can benefit brands: demonstrating eco-commitments with suppliers can be an attractive point-of-difference from competitors. Transparency should be attractive to suppliers. Brands can be held accountable for bad business practices, such as withholding payment, thus holistically improving industry regulations and standards.

While publishing suppliers is a commendable step towards this transparency, a recent study has found that brands tend to disclose demonstrably sustainable suppliers while excluding those that do not meet ESG standards, effectively greenwashing supply chains.

CASE STUDY: SHEEP INC

London-based brand Sheep Inc presents originality with its supply chain first, product second model. The wool knitwear brand's unique selling point is an app-integrated near-field communication (NFC) tag included with every product. Buyers tap their phone to the NFC tag, unlocking access to information on its full production history. Details from the New Zealand farm the sheep's wool is sourced from, to the sustainably-certified Italian textile factory that processes the wool, to the name of the person who hand finishes the garment are immediately available to purchasers.

> MANY SUPPLIERS WILL TELL YOU, OFTEN IN GOOD FAITH, THAT THE PRODUCTS THEY ARE SUPPLYING ARE SUSTAINABLE. BUT WITHOUT CREDIBLE CERTIFICATION THERE IS OFTEN NO WAY TO KNOW IF THAT’S REALLY THE CASE.
>
> *Tallulah Chapman, Communications Manager, FCS UK*

SUSTAINABLE SUPPLIER CERTIFICATION

Manufacturing certifications should be on the radar of brands vetting new potential suppliers. They qualify any claims of sustainable production and can supplement any brand-held certifications.

“Standards are the ‘how to guides’ for suppliers to use to provide the objective evidence that they are not just saying that they are a trusted supplier, but that it has been independently validated and verified through an impartial third party. Proving that they ‘walk the walk’ so to speak,” Coole argues.

A recent Fashion Revolution survey discovered that only 5% of fashion brands declare the certifications of their first-tier manufacturers, dropping to only 2% of brands that disclose that of processing facilities. Certifications also benefit suppliers, providing – often global – recognition of production standards.

Single issue certification tackles one component of a supply chain i.e. sourcing and production standards for a particular material (see the FSC and LGW below for examples). Positive Luxury’s Butterfly Mark represents a systemised certification process that uses single issue certification to analyse the holistic sustainability performance of a brand.

Certifications to look out for include:

Butterfly Mark
Positive Luxury’s stringent ESG+ (environment, social, governance and innovation) framework analyses practices and material risks across luxury verticals and business size. The certification was developed by globally recognised institutions – including academics and NGOs such as the UN and BSI – for use by brands, suppliers and retailers.

When Positive Luxury assess a business’ ESG performance, it is not based on a combined score. The opposite approach is taken, ensuring companies are evaluated in each assessment pillar (environmental, social, governance and innovation) to understand the performance in each area of ESG+ today – and also in the future.

Carbon Trust, PAS 2060 Carbon Neutral Certification
Carbon Trust encompasses a global team of sustainability experts who analyse potential carbon emissions reductions

from businesses. Carbon Trust assesses the carbon footprint of an organisation, its events, products and Scope 3 categories to PAS 2060, the only internationally recognised carbon neutrality specification.

CASE STUDY: SALT OF PALMAR

Mauritanian hotel chain SALT boasts a 100% Carbon-free stay for guests by ensuring sustainability from its on-site vegetable garden to prohibiting the use of single-use plastics and offsetting Greenhouse Gas emissions through UNFCCC-registered projects.

Fairtrade
Fairtrade certification ensures that farmers, workers, traders and stakeholders get paid fairly, have safe and healthy working conditions and operate in fully transparent working models.

Forest Stewardship Council (FSC)
The FSC is a non-profit organisation that promotes responsible management of global forests. FSC certification guarantees manufacturers have sourced forest-based materials (wood, paper etc) responsibly. FSC labels on products provide information on the origins of materials used in a product. The FSC Chain of Custody certification tracks FSC-certified materials from their origin (i.e. forests) to the consumer.

Global Recycled Standard (GRS)
The GRS is an internationally recognised verification of recycled materials. GRS-approved sites are held to strict environmental and social requirements while GRS certification audits each stage of the supply chain to ensure standards are upheld.

Global Sustainable Tourism Council (GSTC)
The GSTC criteria promote a global standard for sustainability within travel, focusing on issues of sustainable management, socioeconomic impact, cultural impact and environmental impact.

Leather Working Group (LWG)
The LWG is a not-for-profit organisation working to improve international leatherworking. It certifies sustainable practices across retailers, tanneries, traders, leatherware manufacturers and industry-adjacent suppliers.

CASE STUDY: NERI KARRA

Bulgarian leather goods brand Neri Karra uses only LWG-certified skins to ensure full traceability from where the animal was reared to how it was treated during its lifetime. In addition, Neri Karra products are made from by-products of the food industry i.e. leather and upcycle all waste from product cuttings to ensure a circular production model.

Organic Content Standard (OCS)
The OCS certifies that raw materials are sourced from organic-certified farms. Once a raw material has been OCS certified, the OCS tracks its use along the supply chain to ensure organic compliance in manufacturing and production, ensuring end-to-end organic standards.

Responsible Jewellery Council (RJC)
The RJC offers an auditing service for jewellery and watchmakers to ensure every stage of a brand’s product supply chain meets rigorous environmental and social sustainability standards. The RJC encourages new and existing brands to build up their supply chain with RJC-certified producers.

CASE STUDY: FACET

Spanish jewellery label Facet is committed to proving a fully traceable supply chain for all of its pieces. Facet submits all items for an external audit by RJC-accredited partners to validate that the brand upholds a conscious supply chain.

Many of these certifying bodies include a list of members, enabling brands to find verifiably sustainable suppliers to partner with.

SUPPLY CHAIN LEGISLATION

New and impending laws are set to change standards and practices across international supply chains, which will impact both brands and suppliers. These include:

UK Plastic Packaging Tax: From 1 April 2022, a new tax will apply to manufacturers of or importers of plastic packaging that does not contain at least 30% recycled plastic. The rate is £200 per metric tonne (depending on certain thresholds) of packaging. The tax will impact the profit margin of suppliers not already producing packaging which includes recycled materials, encouraging the adoption of more sustainable production.

After this date, downstream businesses that buy packaging will be jointly and severally liable for this unpaid tax. Brands will therefore have to undertake due diligence checks on any plastic packaging suppliers.

> “BY WORKING WITH CREDIBLE CERTIFICATION SCHEMES AND ENSURING THE RESPONSIBLE SOURCING OF PRODUCTS AND MATERIALS, SUPPLIERS CAN DEMONSTRATE THAT THEY ARE MEETING THEIR CLIENTS' SUSTAINABILITY EXPECTATIONS AND PROCUREMENT CRITERIA.”
>
> *Tallulah Chapman, Communications Manager, FCS UK*

CASE STUDY: MONICA VINADER

London-based jewellery designer Monica Vinader recently conducted a plastic audit across its operations to identify and eliminate excess plastic and, where appropriate, replace it with a more sustainable alternative. The Butterfly Mark-certified brand is transitioning its consumer packaging to be 100% recycled, recyclable and made from 100% FSC-certified paper, altering their roster of packaging suppliers where necessary to uphold this standard.

European Commission Supply Chain Due Diligence: In February 2022, the European Commission adopted a proposal for a directive on corporate due diligence. The directive will make companies responsible for identifying negative global impacts in their supply chain, including human rights violations and ecological damage. Where adverse impacts are found, companies will be held responsible for preventing and ending them. It will apply to EU companies and some non-EU companies depending on the size and turnover generated in the EU.

This directive will legally enshrine brands' responsibility to bring their entire supply chain up to ESG standards, incentivising companies in the EU and further afield to audit their suppliers ahead of this legislation.

Uyghur Forced Labor Prevention Act: In December 2021, the US government signed a new act into law preventing imports from the Xinjiang region of China unless convincing evidence is provided to prove forced labour is not used in the supply chain. The law responds to evidence that Uyghur peoples in the Xinjiang region have been into labour camps, violating their human rights. The act also prevents any components sourced from the Xinjiang region but produced in a third country from being imported without verifying a forced-labour free supply chain.

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IF YOU CAN BE PROACTIVE AND SOMEWHAT VISIONARY IN YOUR APPROACH TO BUSINESS, AND IDENTIFY THE COMING CHANGES BEFORE THEY’RE IMPOSED, THEN YOU’LL BE IN A POSITION WHERE YOU CAN CREATE A COMPETITIVE ADVANTAGE AND AVOID UNNECESSARY DISRUPTION.

PAUL RAW, SENIOR CONSULTANT, BSI

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PART THREE:

MODELLING MUTUALLY BENEFICIAL BRAND & SUPPLIER COLLABORATION

SUPPLY CHAIN RESILIENCE IN PROXIMITY PRODUCTION

The Covid-19 pandemic has highlighted the vulnerabilities of global supply chains, with 94% of Fortune 1000 companies reporting disruption across their supply chains in 2020[7]. Owing to the pandemic, freight costs have increased a significant 400-650%[8]. Higher costs and production debt (which impacts the price of raw materials) has resulted in a growing appetite for more localised production. Studies from the auto industry also indicate that increased supply chain distances can impact end-product quality, further incentivising local production.

CASE STUDY: CHÊNE BLEU

Boutique French winery Chêne Blue (currently undergoing Butterfly Mark certification) integrates locality into all facets of its winemaking. It has eschewed pesticides and instead improves the local ecology with beehives and wildflowers that encourage vine resilience. It has also grown a bamboo forest to filter wastewater inhouse.

The vineyard also offsets its geographic isolation by collaborating with local artistic and cultural projects hosting festivals and exhibitions to justify visitor travel footprints. Chêne Bleu also employs from the local area, holding traditional all-hands lunches for employees every day and nurturing relations with nearby communities.

AUDITING AGAINST REPUTATIONAL RISK

Lacking full oversight on the entire value chain leaves brands vulnerable when supplier practices go awry. Lessons from the Rana Plaza crisis, the ongoing forced labour of Uyghur people and brand-backed Amazon deforestation show that consumers are not sympathetic when brands claim ignorance to ecological and humanitarian abuse in their supply chain.

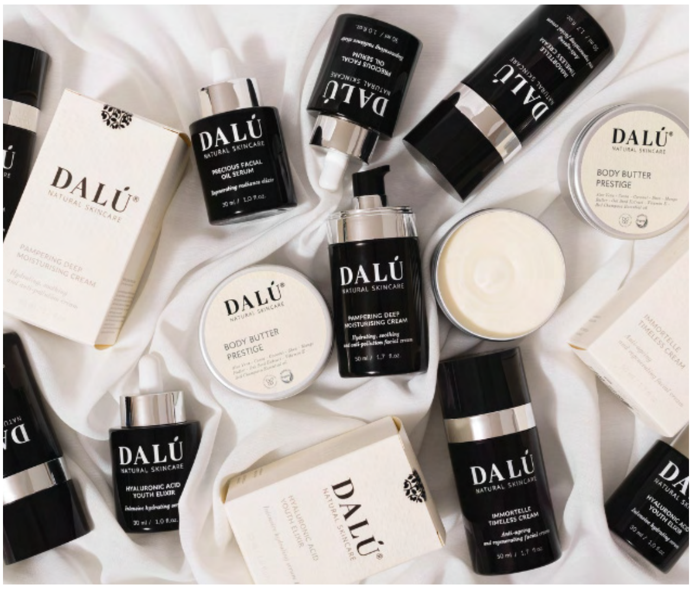
To tackle blind spots, brands can publish an audit of their suppliers, including location, address and employment statistics for transparency.

CASE STUDY: DALÚ NATURAL SKINCARE

Established in 2019, Slovenian skincare brand Dalú has ensured an ESG-compliant supply chain since launch by implementing a social and environmental code of conduct with suppliers. Brands with existing supply chains can retrofit this model by implementing codes of conduct in each new contract.

COMMITTING TO COMMUNITY INVESTMENT

During the Covid-19 pandemic, brands that refused to pay their suppliers when plummeting product demand caused them to cancel orders faced widespread consumer criticism. When brands invest in their suppliers instead, paying manufacturers on time, creating fair payment terms and supporting them to become more sustainable, their business benefits local communities and socioeconomics. Brands should capitalise on these gains by making them visible and tangible to consumers, who are willing to pay a premium for products with demonstrable sustainability credentials.



CASE STUDY: GUCCI

In July 2021, Gucci launched a project with Italian bank Intesa Sanpaolo, providing its Italian suppliers with financing for sustainable business transformation. The collaboration funded initiatives like reducing waste, boosting energy efficiency, pursuing a circular production model and ensuring equitable employment practices.

This sustainability-focused programme was developed from Gucci and Intesa Sanpaolo's 'Sviluppo Filiere' initiative. It provided Gucci suppliers with beneficial loan terms and conditions during the Covid-19 pandemic. Within one year of the initiative's launch, 150+ Italian suppliers from Gucci's supply chain had benefitted from over €230 million in loans from Intesa Sanpaolo.

Brands have the opportunity to retrofit their supplier relationships, moving beyond seeing them simply as sources but actively investing in their sustainable development to improve their end-to-end conscious credentials.

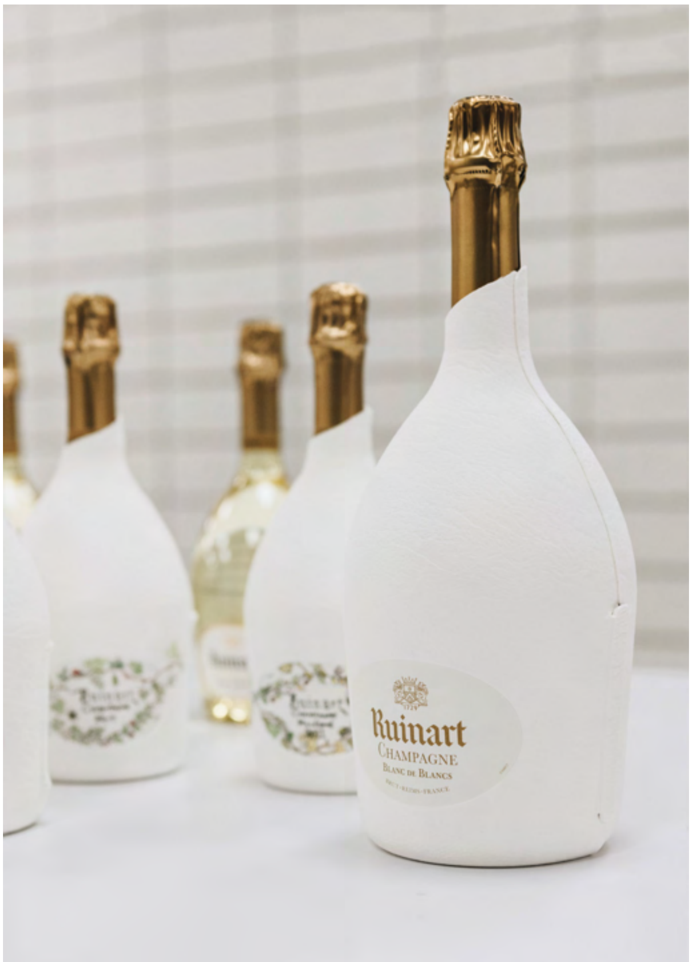
SUPPLIER-FIRST INNOVATIONS

Viewing suppliers as full partners can benefit brands, as manufacturers are often at the front line of innovation, creating products that will improve company bottom lines and advance sustainability goals.

CASE STUDY: COLOURFORM

Innovative thermoformed luxury packaging brand COLOURFORM, from UK company James Cropper, creates bespoke packaging from FSC-certified sustainable moulded fibre. Working with luxury wine label Ruinart, COLOURFORM developed a 100% recyclable second skin, replacing Ruinart's classic gifting box with a case nine times lighter, reducing the product's carbon footprint by 60%.

"We have a code of conduct for our supply chain, and seek to work with other businesses aligned to our own ethics and sustainability commitments. Brands choose to work with us when they are looking for innovative and sustainable packaging solutions that are kinder to the planet than their current offering," Richard Dancy, Brand Manager COLOURFORM told Positive Luxury.



BUILDING BRANDED SUPPLY CHAINS

To ensure holistic supply chain oversight and mitigate risks along the value chain, savvy brands are acquiring their manufacturers – or vice versa. In doing so, brands can provide suppliers with the investment and resources to become sustainably accredited while suppliers can expand innovation without financial risk.

CASE STUDY: CHANEL

French luxury house Chanel now owns 41 of its suppliers, with seven manufacturers acquired in the last two years alone. Approximately a third of the brand's manufacturing now takes place in-house. In December 2021, the brand unveiled 19M, a new design campus to physically house 11 of Chanel's subsidiaries, including embroider Lesage and hatmaker Maison Michel.

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ONE OF THE KEY COMPONENTS OF MAINTAINING COMPLIANCE IS LOOKING TO YOUR EXTENDED SUPPLY CHAIN, DOWNSTREAM, THROUGH YOUR SUPPLIER GROUPS, TO ENSURE THAT THEY ARE COMPLYING WITH THE REGULATORY REQUIREMENTS. THIS IS DONE THROUGH A QUALITY OR BUSINESS PERFORMANCE AUDIT, IDEALLY ON A REGULAR CADENCE.

DAVID FAIRNIE, PRINCIPAL CONSULTANT OF SUPPLY CHAIN SECURITY, BSI

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KEY TAKEAWAYS:

WHAT SUPPLIERS CAN DO TO ATTRACT SUSTAINABLE BRANDS

KNOW YOUR OWN SUPPLY CHAIN

Like brands themselves, Tier 1 (and even 2) suppliers must do due diligence on their own supply chain, investing in partnerships and ensuring they are doing business with ESG-complaint businesses. Being able to prove your upstream supplier sustainability credentials will help attract and win new clients.

PROMOTE YOUR TERROIR

Luxury brands are built on heritage and legacy: suppliers should use this to their advantage. How long has your company been in operation? Is this a family-owned company? Does your local region boast internationally-valued resources? Invest in your own prestige to attract sustainable luxury clients.

INVEST IN FUTURE-PROOFING

Laws are being enacted to restrict ecologically harmful products and processes. Ensure your R&D department keeps abreast of legislature and material developments to establish and retain a competitive edge.

SELF-AUDIT

Many sustainability certifications listed above include a self-check list for suppliers to audit sourcing, manufacturing and employment practices. Ensure your business can meet these standards before applying for full certification.

COMMUNICATE THE PROCESS

Becoming holistically sustainable doesn’t happen overnight; promote the steps you are taking to become more sustainable and seek out partners who are willing to support, encourage and invest in sustainable transformation.

GET CERTIFIED

In the next five years, brands will be increasingly seeking out ESG-compliant suppliers. Certified suppliers will stand out, as brands will not have to spend time and resources individually assessing a supplier’s suitability.

GET IN THE TRADE

Tradeshows are a great place to court new clients. Make sure you promote your ESG credentials and eco-certification in addition to exhibiting your products.

START SMALL

Brands and suppliers should start with small, low-risk collaborations to iron out any sustainability issues within the value chain. Once these are addressed, and mutual trust is established, a more advanced relationship can be pursued.

EXPLORE SUSTAINABLE SUPPLIER TOUCHPOINTS

There are many intersections at which suppliers can attract the attention of sustainable brands. Take hotel chains; where are they sourcing their food? Are their amenities sustainably made and packaged? Do their soft furnishings have a transparent supply chain? Prove where your products can be invaluable to brands looking to improve the footprint of their entire value chain.

CONCLUSION

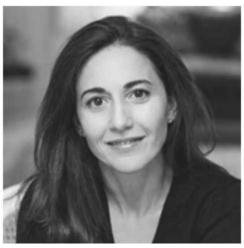
IN LIGHT OF impending legislation and growing consumer awareness, brands can no longer separate their business operation from that of their suppliers. The rise of cross-vertical collaboration will fundamentally transform global product life cycles, presenting an opportunity for brands to remake their supply chains in a more sustainable image and collaborate with manufacturers to produce market-disrupting products and services.

Suppliers, on the other hand, should prepare for increased expectations from brands for their suppliers to help them achieve their goals. Tier 1 suppliers in particular need to examine their own supply chain for risks and strengthen sustainability performance across their value chain. This will increase their ability to win new business and maintain existing customers.

As we've explored in this report, we expect brands in the luxury market to lead transformation in the wider market through:

- Providing supply chain transparency to rectify accusations of greenwashing
- Expecting certification across the board that proves positive impact on both people and the planet
- Creating resilient, flexible supply chains that embrace both market opportunity and limitations to create original products
- Identifying and working to mitigate negative impacts across the supply chain, rather than turning a blind eye
- Considering the beneficial community and socioeconomic impact as a business incentive
- Adopting and nurturing suppliers as subsidiaries in an expression of investment and resource-sharing
- Recognising and supporting the wealth of innovation and potential captured within the breadth of global suppliers

When brands and suppliers embrace each other as full partners – collaborating to innovate – both critical parts of the luxury industry will have the opportunity to remake the entire global supply chain to align with positive planet – and human-centric missions.



Diana Verde Nieto,
Co-CEO Positive Luxury

CITATIONS

[1] McKinsey, 2022
[2] McKinsey, 2022
[3] McKinsey, 2021
[4] McKinsey, 2021
[5] McKinsey, 2020
[6] Oracle, 2021
[7] Fortune, 2020
[8] BSI, 2021

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