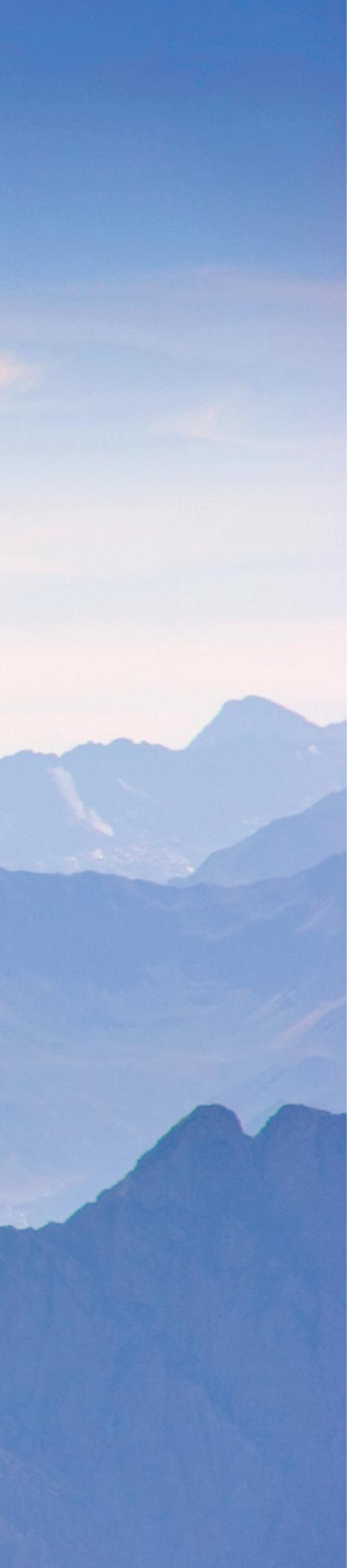

TALENT RISING

HIGH-IMPACT ACCELERATORS TO GLOBAL GROWTH

EXECUTIVE SUMMARY



CONTENTS

-  INTRODUCTION
-  OVERALL FINDINGS
-  ACCELERATOR 1: EDUCATION
-  ACCELERATOR 2: HEALTH AND WELLNESS
-  ACCELERATOR 3: CAREER EXPERIENCE
-  THE ROLE AND IMPACT OF ENABLERS
-  CONCLUSION

INTRODUCTION

IN TODAY'S GLOBAL ECONOMY, CEOS UNDERSTAND THAT TALENT IS A PRIMARY SOURCE OF COMPETITIVE ADVANTAGE. WHETHER ENTERING A NEW MARKET, INNOVATING EXISTING PROCESSES, OR DEVELOPING OR EXPANDING PRODUCT OR SERVICE LINES, TALENT IS THE ESSENTIAL ELEMENT OF EVERY CORE BUSINESS FUNCTION. YET MANY LEADERS STILL CITE THE LACK OF ADEQUATE TALENT PIPELINES AMONG THEIR MOST CRITICAL BUSINESS CHALLENGES. WHY DOES THIS REMAIN SUCH AN ELUSIVE GOAL?

The answer lies in our changing notion of capital. In the past, companies' chief sources of competitive advantage were financial capital and the lands, buildings, and machines they owned or managed; they did not rely heavily on institutions and systems outside their control for success.

Yet today — when human capital is the main determinant of success — many organizations are leaving the education, health, and development of their talent largely to external systems and forces, with resulting gaps in their talent portfolios.

It is increasingly clear that a new perspective must prevail. As Klaus Schwab, Founder and Executive Chairman of the World Economic Forum, has succinctly stated, "Talentism is the new Capitalism." Thus, for organizations to acquire, retain, motivate, and develop healthy, productive workforces, they must commit to talentism, not only internally through the creation of effective talent practices, but also externally through collaborative public, private, and peer initiatives designed to enhance the quality and availability of talent.

This shifting view prompted Mercer and the Forum to conduct global research in 2011 to better understand global good practices in talent mobility and development. From this initial research, Mercer created the Talent Barometer in 2012 and conducted additional research to:

- Measure the degree to which organizations have a formal, strategic workforce plan that addresses their most critical talent.
- Identify the factors that characterize a successful workforce plan.
- Explore three critical accelerators for high-performing talent — education, health and wellness, and career experience — and identify effective practices and opportunities in each.
- Identify the role and assess the level of interventions employers are making in each of these areas to ensure that their talent is highly competitive, competent, and productive.
- Explore the organizational enablers that support enhanced talent management.
- Identify industry and regional patterns in talent development.

Mercer's Talent Barometer Survey includes responses from HR and talent management executives of 1,268 organizations representing 65 countries around the globe. The organizations surveyed vary in size from fewer than 1,000 employees to more than 10,000 employees (including government and not-for-profit organizations) and represent a wide variety of industries.

FIGURE 1: LOCATION OF SURVEY PARTICIPANTS

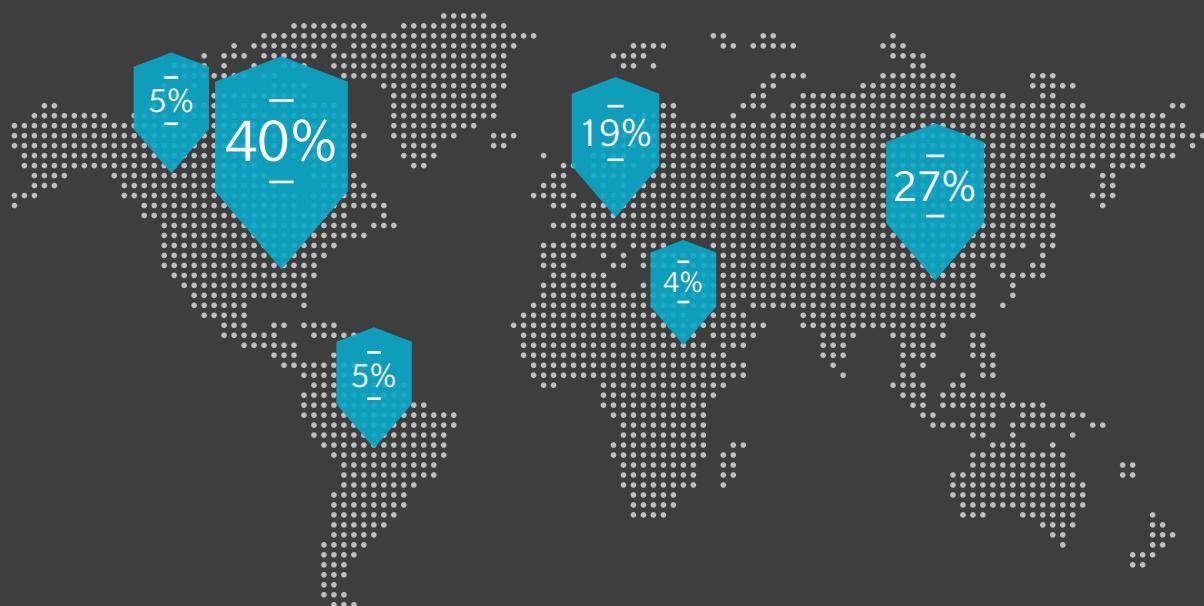


FIGURE 2: TOP 10 INDUSTRY SECTORS REPRESENTED

MANUFACTURING	FINANCIAL SERVICES	RETAIL/WHOLESALE	PROFESSIONAL SERVICES	TECHNOLOGY
19%	8%	7%	7%	7%
CONSTRUCTION/ENGINEERING	OIL & GAS	TRANSPORTATION/LOGISTICS	LIFE SCIENCES	TELECOMS
5%	4%	4%	3%	3%

Note: Throughout this report, percentages in the charts and graphs may not equal 100 due to rounding.

TALENT BAROMETER RESEARCH RELEASED AT THE WORLD ECONOMIC FORUM 2013 ANNUAL MEETING

The World Economic Forum Annual Meeting in Davos-Klosters, Switzerland, provided the backdrop for the launch of Mercer's Talent Barometer in January 2013. Leaders from business, academia, government, and NGOs descended on the tiny Swiss village ... and talent was on their minds. Mercer hosted an intimate discussion group on the research findings and good practices.

Julio Portalatin, Mercer CEO, opened the discussion, challenging the group to reflect on what kind of workforce plans they have in place if talent investments are not bringing the desired return. Consistent with the research, good practices emerged:

- The issue of talent should not only be on the CEO's agenda but on that of the whole executive leadership team.
- A workforce plan should focus on more than just numbers. It should identify the required skills and capabilities, provide an overview of current demographics, and be aligned with the company's growth strategy.
- Companies need to further develop a forensic skill around workforce planning.
- The workforce plan should drive through the entire organization and be just as effective at a local level.

Citing the new Talent Barometer research, Pat Milligan, Region President at Mercer, stated that successful companies are not waiting for education and health systems to catch up with demand ... they are intervening. Current practices that were cited included:

- Pioneering talent education through virtual learning and communities.
- Teaching high-demand skills such as computer science in secondary schools.
- Developing a global health management system that balances local differences.
- Using wellness programs as an engagement tool to retain talent.

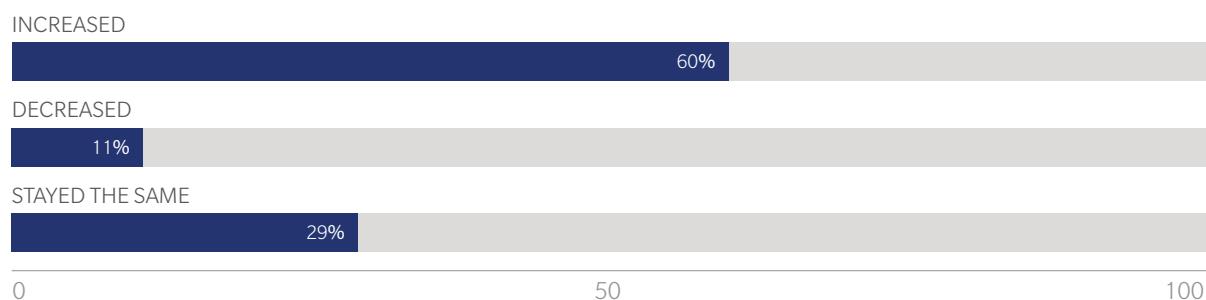
Orlando Ashford, President of Talent at Mercer, highlighted the challenges in the developing world, where managers are so focused on recruiting for growth that they are not spending time on talent and career development and the longer-term benefit of bringing global diversity into the organization.

The group concurred that talent needs to be positioned as a strategic financial investment with an expected return, and that with the information systems and data widely available today, talent can be measured and managed like never before. And finally, there was strong support for the continued sharing of good practices, which helps support the business case for talent as a source of competitive advantage.

OVERALL FINDINGS

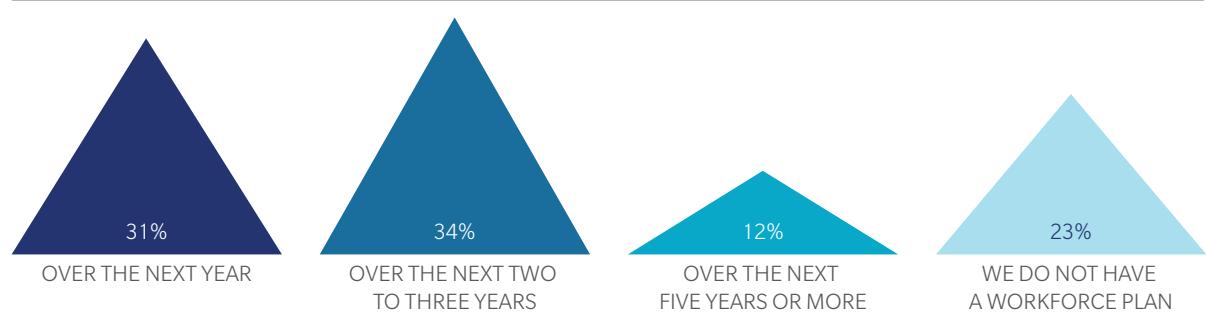
RECOGNIZING THE GROWING IMPORTANCE OF TALENT IN DRIVING SUCCESS, ORGANIZATIONS AROUND THE WORLD ARE MAKING GREATER INVESTMENTS IN TALENT, ACCORDING TO THE TALENT BAROMETER SURVEY. SIX IN 10 COMPANIES REPORTED INCREASING THEIR INVESTMENT IN RECENT YEARS, WHILE ONLY ONE IN 10 REPORTED DECREASING THEIR INVESTMENT.

FIGURE 3: CHANGE IN TALENT INVESTMENT IN RECENT YEARS



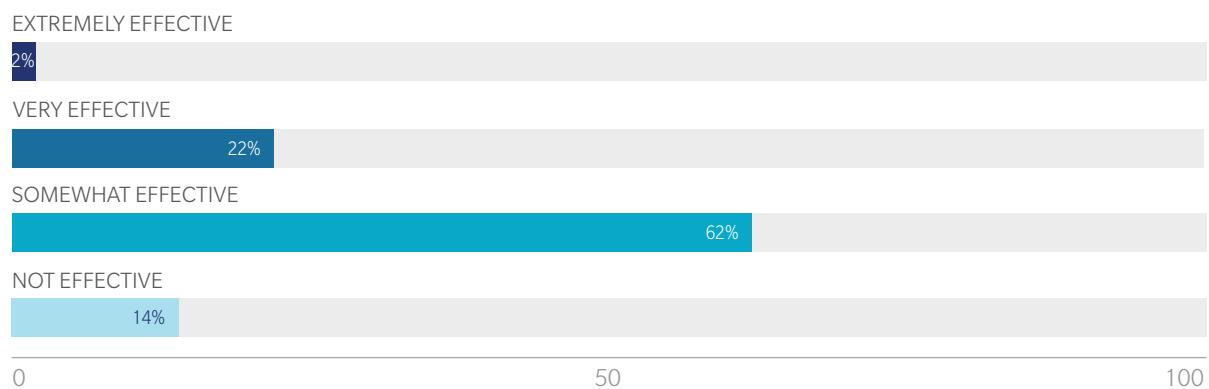
Mercer also asked respondents about the existence and effectiveness of their organizations' workforce plans. More than three-quarters indicate that they have plans that forecast their talent needs, but the scope of these plans varies. Very few have plans that forecast talent needs over the next five years or more.

FIGURE 4: DURATION OVER WHICH WORKFORCE PLANS FORECAST TALENT NEEDS



Despite the existence of a workforce plan at most organizations, respondents did not perceive these plans to be particularly effective. Only one-quarter rated their plans as extremely or very effective in meeting the organization's immediate and long-term human capital needs. The majority said their plan was only somewhat effective.

FIGURE 5: PERCEIVED EFFECTIVENESS OF WORKFORCE PLAN IN MEETING IMMEDIATE AND LONG-TERM HUMAN CAPITAL NEEDS



Other questions in the Talent Barometer Survey have been analyzed against these ratings to identify the factors that most consistently characterize an effective workforce plan.

WHAT IS A STRATEGIC WORKFORCE PLAN?

Strategic workforce planning is a systematic process for forecasting an organization's future workforce and determining the most effective practices and policies to close gaps to meet future workforce needs. It considers both internal and external labor markets and includes the following steps:

- **Identify human capital requirements** — Consider how needs will change over time.
- **Identify critical jobs** — Take into account labor scarcity, learning curves, and feeder jobs that supply other jobs.
- **Forecast your future workforce and labor market outlook** — Determine how many workers you will likely have by job family and by location, and forecast how well the labor market can supply needed skills.
- **Determine current and forecast future workforce gaps** — Identify gaps for critical and noncritical jobs over the next five to 10 years.
- **Identify internal and external drivers of current workforce composition and engagement** — Understand the processes and practices that will most effectively fill these gaps based on statistical analysis of your workforce history.
- **Formulate workforce plans** — Determine the most effective way to fill the gaps, specific actions, responsibilities, timeline, and a way to measure each solution's effectiveness.
- **Execute and monitor interventions** — Analyze the success of your interventions at regular intervals to determine what should be adjusted or changed.

ACCELERATOR 1: EDUCATION

KEY TAKEAWAYS

- Educational institutions are failing to generate the talent required by many organizations today.
- Some employers are addressing the educational gap by partnering with educational institutions or designing student programs.
- Respondents say that professional sciences (business, law, etc.) and formal sciences (IT, math, etc.) are the most important to their organizations.

To deliver top value to the organization, talent must have the skills and knowledge necessary for the role, as well as the broader creative and critical-thinking skills that can elevate organizational performance to its highest level. Despite high unemployment in many regions of the world, organizations today face a shortfall of qualified talent to fill critical roles.

According to Mercer's Talent Barometer research, more than half of organizations (57%) say that educational institutions are failing to generate the talent needed by their businesses today — and roughly the same percentage (59%) believe this still will be true three to five years out.

Some employers are filling the gaps in the educational system by partnering with educational institutions or designing programs targeting students. Older students are the group most frequently targeted. Very few employers are partnering with educators to reach students at the early childhood or primary levels.

FIGURE 6: THE EXTENT TO WHICH ORGANIZATIONS PARTNER WITH SCHOOLS OR HAVE PROGRAMS THAT TARGET STUDENTS AT EACH EDUCATIONAL LEVEL

EARLY CHILDHOOD EDUCATION



PRIMARY EDUCATION



SECONDARY EDUCATION (HIGH SCHOOL)



VOCATIONAL/TRADE SCHOOLS



TERTIARY SCHOOLS (BACHELOR'S, MASTER'S, DOCTORAL)



0

50

100

■ TO A VERY LARGE OR LARGE EXTENT

■ TO SOME OR A MODEST EXTENT

■ NOT AT ALL

Organizations also are employing other ways to better prepare and recruit future talent. Mercer's research shows that employers are most likely to participate in internships and job fairs and least likely to participate in university advisory councils or help shape academic curricula.

FIGURE 7: THE EXTENT TO WHICH ORGANIZATIONS ENGAGE IN THIS TYPE OF PARTNERSHIP

INTERNSHIP PROGRAMS



JOB FAIRS/PORTALS



VOCATIONAL TRAINING/APPRENTICESHIPS



PARTICIPATION ON UNIVERSITY ADVISORY COUNCILS



PARTNERSHIP WITH EDUCATIONAL BODIES TO SHAPE ACADEMIC CIRRICULA



0

50

100

■ TO A VERY LARGE OR LARGE EXTENT ■ TO SOME OR A MODEST EXTENT ■ NOT AT ALL

More than 50% of respondents say that professional sciences (business, education, law, and social work) and formal sciences (computer science, information technology, mathematics, and statistics) are the areas of study most important to their organizations. Only a quarter list natural sciences (life science, chemistry, and physics) as important to their business, and less than a fifth cite social sciences (economics, political science, psychology, and sociology) or humanities as important.

CHARACTERISTICS OF AN EFFECTIVE WORKFORCE PLAN

Mercer's analysis identified several educational factors that, when present, indicate a greater likelihood of having a workforce plan that is perceived to be effective. Organizations that rate their workforce plan as effective are more likely to:

- Partner with tertiary schools (bachelor's, master's, doctoral programs) or have programs that target students at tertiary schools.
- Engage in or offer apprenticeships.
- Engage in or offer internship programs.
- Offer job fairs/portals.
- Participate in university advisory councils and in shaping academic curricula.

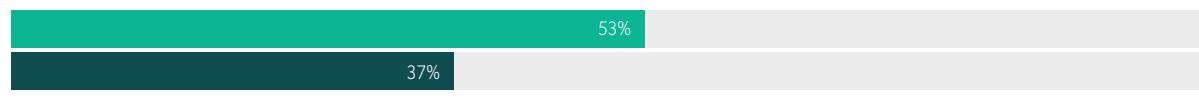
In addition, those who report having an effective workforce plan are also more likely to view educational institutions as meeting their talent needs, both today and in the future.

FIGURE 8: DIFFERING VIEWS OF EDUCATIONAL INSTITUTIONS

EDUCATIONAL INSTITUTIONS ARE GENERATING THE TALENT NEEDED TO FILL MY ORGANIZATION'S IMMEDIATE BUSINESS NEEDS (ONE TO TWO YEARS)



EDUCATIONAL INSTITUTIONS ARE GENERATING THE TALENT NEEDED TO FILL MY ORGANIZATION'S BUSINESS NEEDS THREE TO FIVE YEARS INTO THE FUTURE



HAVE AN EFFECTIVE WORKFORCE PLAN HAVE A NONEFFECTIVE WORKFORCE PLAN

ACCELERATOR 2: HEALTH AND WELLNESS

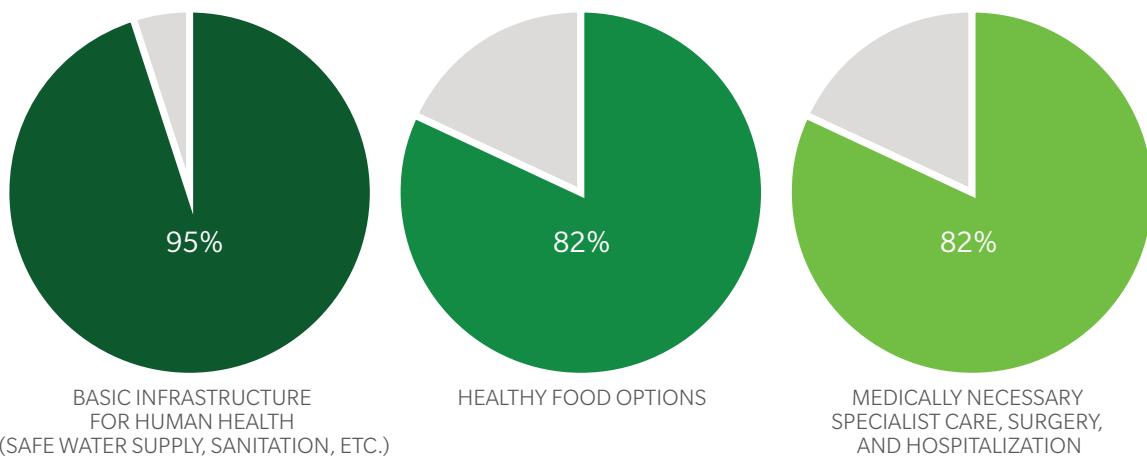
KEY TAKEAWAYS

- Globally, most respondents say employees have reasonably easy access to health resources.
- Significant shortcomings exist in organizations' efforts to develop and execute comprehensive health management strategies.
- Few respondents globally said that health and wellness are incorporated into business values and strategic priorities.

A key element of effective talent management is having a healthy, productive workforce. Increasingly, this involves not just investment in prevention but also a change in the employer and employee mindset regarding overall well-being, energy, and resilience.

Reasonably easy access (that is, without significant barriers such as cost, waiting lists, or geographic distance) to health resources varies by geography. On a global basis, most respondents indicated that access is not a major issue, with the following resources receiving the highest scores.

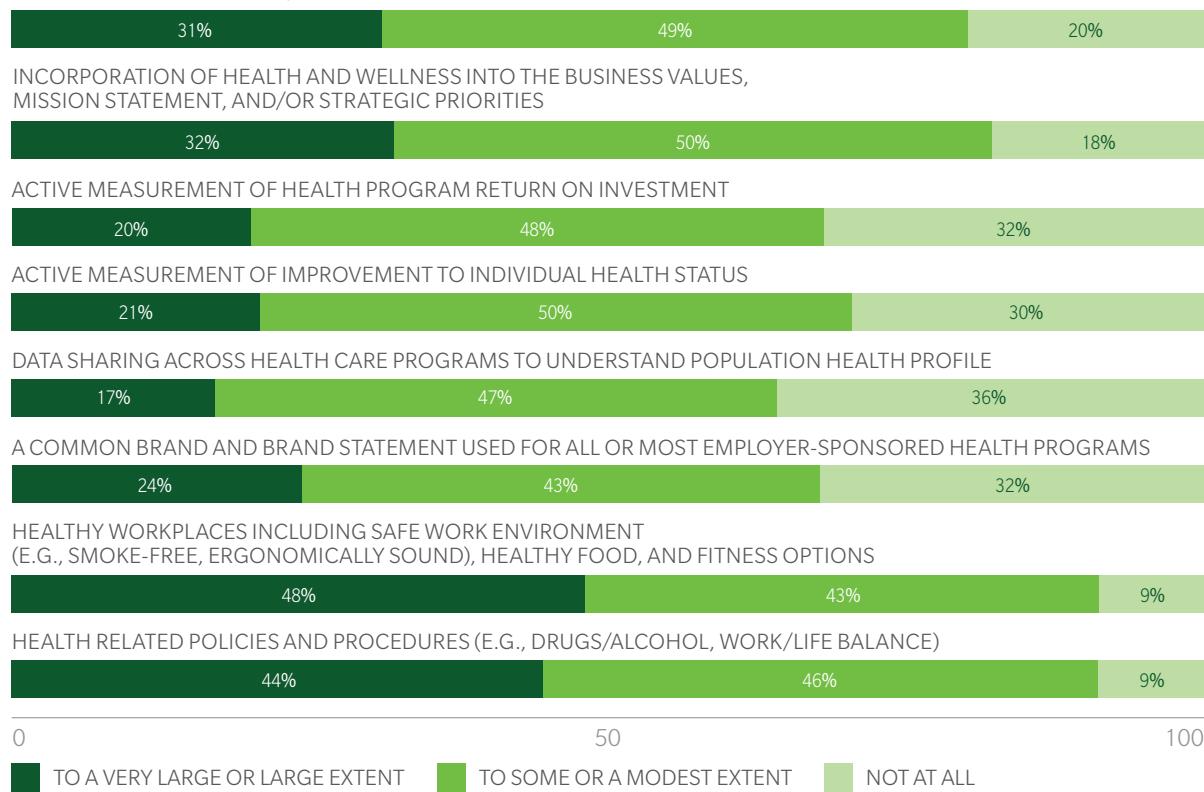
FIGURE 9: EMPLOYEE ACCESS TO HEALTH RESOURCES (PERCENTAGE REPORTING GOOD ACCESS)



The Talent Barometer Survey revealed significant shortcomings (and hence, opportunities) in organizations' efforts to develop and execute comprehensive health management strategies. In fact, the research showed that, globally, only the most basic elements of a health management program are typically in place, such as ensuring a healthy workplace and establishing health-related policies and procedures. Strategic planning, leadership support, and active measurement efforts were lacking.

FIGURE 10: EXTENT TO WHICH ORGANIZATION IS ACTIVE IN THE DEVELOPMENT AND EXECUTION OF CORPORATE HEALTH MANAGEMENT STRATEGY THROUGH:

A FORMAL, WRITTEN, MULTIYEAR STRATEGIC PLAN FOR EMPLOYEE HEALTH AND WELLNESS ADDRESSING PROGRAM OBJECTIVES AND MINIMUM STANDARDS FOR PREVENTION AND TREATMENT



Organizations typically move through different stages of development as they build best-practice wellness and health management programs. Nearly half of the respondents (48%) indicated that they are at the beginning two stages on the continuum, focused on more limited and often ad hoc measures such as basic education and risk screening. Just over a third (36%) are at more advanced stages — employing targeted interventions for high-risk individuals and providing programs that deliver awareness, health assessments, and disease management. The remaining 16% don't provide any support for employee health beyond coverage for treatment in accordance with local legal requirements and market practice.

Mercer asked whether organizations were involved in driving systemic changes designed to enhance employee health and wellness — for example, working in collaboration with governments, insurers, health care providers, and other employers. Few indicated that they were taking significant actions in this area. About half are taking no action at all; they view it as either not their role or not an effective way to bring about change.

CHARACTERISTICS OF AN EFFECTIVE WORKFORCE PLAN

Analysis of Mercer's Talent Barometer Survey identified an interesting correlation between an organization's perception of whether its workforce plan is effective and the degree to which that same organization invests in health and wellness programs and initiatives. Organizations that categorize their health and wellness programs at a more basic level (Stage 1) are less likely to rate their workforce plan as effective, while organizations that make significant health and wellness investments (Stage 4) are much more likely to rate their workforce plans as effective.

FIGURE 11: DIFFERING VIEWS ON WORKFORCE PLAN EFFECTIVENESS

STAGE 1 OF HEALTH AND WELLNESS PROGRAM



STAGE 2 OF HEALTH AND WELLNESS PROGRAM



STAGE 3 OF HEALTH AND WELLNESS PROGRAM



STAGE 4 OF HEALTH AND WELLNESS PROGRAM



HAVE AN EFFECTIVE WORKFORCE PLAN HAVE A NONEFFECTIVE WORKFORCE PLAN

The analysis also identified several factors that, when present, indicate a greater likelihood of having an effective workforce plan. Organizations that rate their workforce plan as effective are more likely to:

- Actively measure individual health status improvement.
- Share data across health programs to understand the population health profile.
- Actively promote a healthy and safe workplace.
- Use high-impact communication (campaigns, themes, and messages) to motivate change.
- Use team activities and social media to motivate change.

ACCELERATOR 3: CAREER EXPERIENCE

KEY TAKEAWAYS

- Although most respondents conduct regular talent reviews, relatively few map out future talent needs or have succession plans in place.
- Buying talent from the market is more common than building talent from within.
- The most prevalent career experience programs were internal-mobility programs and fast-track career development for high-potential talent.

Talent thrives when it has access to progressive opportunities for growth, through experiences that not only accelerate and enhance ability and productivity, but are also essential to human satisfaction. Without planned and thoughtful career development, employee engagement tends to flag, and companies lose the momentum that would result from employees' best work.

From a global perspective, Mercer's Talent Barometer Survey found that organizations take the issue of career experience seriously, and the majority of respondents (80%) conduct regular (annual or biannual) talent reviews. However, they are somewhat less consistent on a range of other actions that could enhance talent availability and quality.

FIGURE 12: EXTENT TO WHICH THE ORGANIZATION TAKES VARIOUS STEPS TO ENHANCE TALENT AVAILABILITY AND QUALITY:

ASSESSES ITS SUPPLY AND DEMAND OF CRITICAL TALENT



HAS A STRATEGIC SUCCESSION PLAN IN PLACE



MAPS CAREER AND LEADERSHIP PROGRAMS FOCUSED ON CRITICAL TALENT DEVELOPMENT



HAS ACCESS TO RELIABLE INFORMATION ON LABOR POOL AVAILABILITY OUTSIDE ITS HOME MARKET



PARTICIPATES IN PUBLIC SECTOR INITIATIVES AIMED AT SHARING INFORMATION ON LABOR SUPPLY AND DEMAND



PARTNERS WITH INDUSTRY PEERS TO IDENTIFY AND ASSESS CRITICAL TALENT NEEDS IN THE INDUSTRY



0

50

100

TO A VERY LARGE OR LARGE EXTENT TO SOME OR A MODEST EXTENT NOT AT ALL

Respondents were also asked what kind of career experience programs they had in place to meet their talent needs, along with the extent to which they engaged in these programs, and how effective they were in achieving their goals.

The most prevalent programs included:

- Internal mobility programs across business units, functions, and geographies through job-rotation programs.
- Fast-track career development programs for high potentials.
- Internal mobility across geographies (secondments/expatriate assignments).

On the question of where an organization's experienced talent comes from (that is, do they build talent from within or do they tend to "buy" talent on the domestic or international market to fill critical roles), 66% of respondents globally indicated that they fill critical roles from the outside; 34% fill them from within.

CHARACTERISTICS OF AN EFFECTIVE WORKFORCE PLAN

Analysis of Mercer's Talent Barometer Survey identified several career-related factors that, when present, indicate a greater likelihood of having a workforce plan that is perceived to be effective. Organizations that rate their workforce plans as effective are more likely to:

- Assess their supply and demand of critical talent.
- Have access to reliable information on labor pool availability outside their home market.
- Have succession plans that include external candidates.
- Have leadership that conducts a regular (annual or semiannual) talent review process.
- Offer fast-track career development programs for high potentials.

In addition, organizations that build their critical talent internally tended to perceive their workforce plans as more effective, compared with organizations that rely more heavily on buying critical talent from the market.

FIGURE 13: DIFFERING VIEWS ON WORKFORCE PLAN EFFECTIVENESS

HOW WORKFORCE PLAN IS RATED:



THE ROLE AND IMPACT OF ENABLERS

KEY TAKEAWAYS:

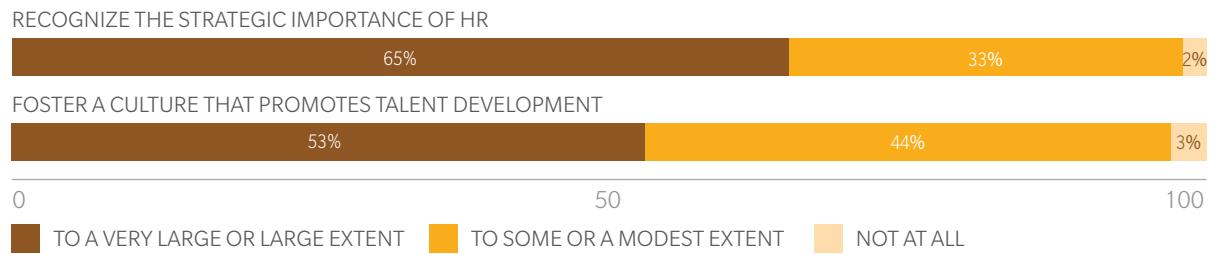
- Specific talent and workforce programs and practices are made more effective by an underlying infrastructure of support.
- Organizations that perceive their workforce plans as more effective also make HR and talent management more of a priority.
- Leadership support — especially in fostering a culture of talent development — is essential.

Simply having a wellness or talent practice in place does not guarantee the success of those programs. Mercer's research showed that employers with higher levels of effectiveness have created the underlying infrastructure necessary to enable those programs. Enablers include leadership support, formal measurement systems, and communication and engagement programs.

In addition, organizations with effective workforce plans appear to make HR activities more of a priority, creating specific HR positions to support the talent fulfillment task. Additionally, these organizations typically have senior leaders who foster a culture of talent development, continually assessing talent, and managing the succession pipeline, as well as continually and consistently communicating people strategy and talent investments to key stakeholders.

The role of leadership in talent management is deemed to be critical. Most respondents confirm that senior leadership (including the CEO and his or her direct reports), to a very large or large extent, recognize the strategic importance of HR. Slighter fewer report that senior leadership, to a very large or large extent, fosters a culture that promotes talent development.

**FIGURE 14: THE IMPACT OF SENIOR LEADERSHIP.
TO WHAT EXTENT DOES SENIOR LEADERSHIP:**



More than a third of respondents (35%) indicate that progress on their organization's people strategy is communicated to senior management and other key stakeholders four or more times each year. Another third (32%) say it is communicated two to three times per year, and 21% say it is communicated once a year. One in 10 (11%) say that people strategy updates are not shared with senior management or other stakeholders on a regular basis.

One opportunity for improvement is to ensure that the enablers that optimize talent investment are consistently delivered across the organization (for example, across business units and geographies). Only one-third of respondents (33%) currently do this to a very large or large extent. The larger share of organizations (58%) report that they do this only to some or a modest extent.

CHARACTERISTICS OF AN EFFECTIVE WORKFORCE PLAN

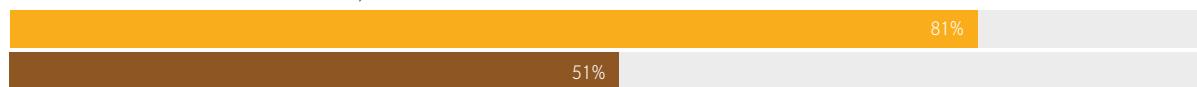
Analysis of Mercer's Talent Barometer Survey revealed that organizations that rate their workforce plan as being more effective appear to be supporting and enabling the talent process in a more comprehensive and robust way.

FIGURE 15: DIFFERING VIEWS ON WORKFORCE PLAN EFFECTIVENESS

COMMUNICATE PEOPLE STRATEGY TO KEY STAKEHOLDERS FOUR OR MORE TIMES PER YEAR



TO A VERY LARGE OR LARGE EXTENT, SENIOR LEADERSHIP FOSTERS A CULTURE THAT PROMOTES TALENT DEVELOPMENT



TO A VERY LARGE OR LARGE EXTENT, THE ORGANIZATION ENABLES THE ASSESSMENT OF TALENT WHILE ALSO BUILDING LEADERSHIP CAPABILITY AND MANAGING PIPELINE SUCCESSION IN AN INTEGRATED FRAMEWORK



TO A VERY LARGE OR LARGE EXTENT, THE ENABLERS THAT OPTIMIZE TALENT INVESTMENT ARE CONSISTENTLY DELIVERED ACROSS YOUR ORGANIZATION (E.G., ACROSS BUSINESS UNITS, GEOGRAPHIES)



█ HAVE AN EFFECTIVE WORKFORCE PLAN

█ HAVE A NONEFFECTIVE WORKFORCE PLAN

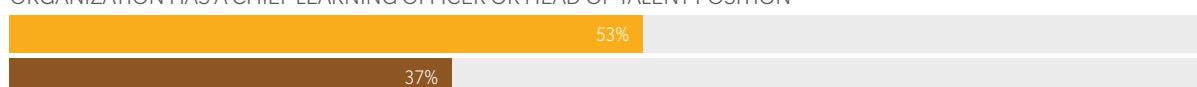
Furthermore, those with a perceived effective workforce plan more often recognize the importance of planning for future talent needs by supporting HR and endorsing additional leadership positions.

FIGURE 16: LEADERSHIP SUPPORT LINKED TO PERCEIVED EFFECTIVENESS

TO A VERY LARGE OR LARGE EXTENT, SENIOR LEADERSHIP (INCLUDING THE CEO AND HIS OR HER DIRECT REPORTS) RECOGNIZES THE STRATEGIC IMPORTANCE OF HR



ORGANIZATION HAS A CHIEF LEARNING OFFICER OR HEAD OF TALENT POSITION



█ HAVE AN EFFECTIVE WORKFORCE PLAN

█ HAVE A NONEFFECTIVE WORKFORCE PLAN

CONCLUSION

ULTIMATELY, THE ACCELERATION AND ENABLING OF TALENTISM IN TODAY'S GLOBAL BUSINESS LANDSCAPE IS AN AMBITIOUS STRATEGY THAT REQUIRES LEADERS WHO ARE WILLING TO INVEST IN TALENT AS THE KEY COMPETITIVE ASSET; A CULTURE THAT VALUES TALENT AND SEEKS TO FIND AND DEVELOP THE BEST IN EVERY MEMBER OF THE TEAM; AND A COLLABORATIVE MINDSET THAT CAN THINK BROADLY, BE COMFORTABLE WITH COMPLEXITY, AND FIND COMMON GROUND WITH THE GOALS OF OTHER STAKEHOLDERS.

THIS COLLABORATIVE ENDEAVOR REQUIRES ALIGNED INCENTIVES FOR PARTICIPATION AND ACTION, STRONG GOVERNANCE, AND CONTINUOUS MEASUREMENT OF PROGRESS AND RESULTS.

PERHAPS MOST IMPORTANT, EFFECTIVE TALENT MANAGEMENT REQUIRES SUCCESSFUL COMMUNICATION — A NONSTOP EFFORT TO ENGAGE THE HEARTS AND MINDS OF PEOPLE INSIDE AND OUTSIDE THE WORKFORCE, AFFIRMING TALENTISM AS THE NEW CURRENCY OF GLOBAL BUSINESS SUCCESS AND SUSTAINABLE GROWTH.

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