

European Update

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MOORE Deutschland

WANDEL ERFOLGREICH GESTALTEN

European Update



OUR PERFORMANCE

GLOBALLY PERFORMANCE – (11)

- Revenue - \$3,945m USD *Last year – Ranked 12*
- Growth – 11%

EUROPEAN PERFORMANCE – (14)

- Revenue - \$941m USD *Last year – Ranked 14*
- Growth – 11%

GERMAN PERFORMANCE – (14)

- Revenue – \$164m USD *Last year – Ranked 15*
- Growth – 12% (EUR)

European Update



REVIEW OF 2022 CHALLENGES

- 10:10:10 Ambition
 - Remaining at 14
 - Referral – data incomplete
- Increasing collaboration group activity
 - Up from 161 in June 2022 to 215 Sep 2023
- Increasing network value?

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MEMBER BENEFITS

- Proposal Support
- Talent – Training and Events
- Utilising the Asia Desk
- Business Development
- Marketing and IT

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PROPOSAL SUPPORT



- 2 German Lead Firms and 4 German Support Firms in 2023
- Of 19 International Opportunities in 2023

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TALENT, TRAINING AND EVENTS

- In 2023



Event/Training Title	Category	Number of Attendees
European Regional Conference 2023	Conference	14
Virtual Managing Partners Meeting - March 2023	Online Meeting/Webinar	8
Essential Skills 2023 Session 2: Stop Procrastinating and Get things done!	Online Meeting/Webinar	5
IFRS Update 1 June 2023	Online Meeting/Webinar	5
Business Development Series 2023 - Part 1	Training	3
Essential Skills 2023 Session 1: Are you the pilot, or the passenger?	Online Meeting/Webinar	3
Moore Ambition 2023: Session 1	Online Meeting/Webinar	3
Moore Ambition 2023: Session 2	Online Meeting/Webinar	3
Without Question	Online Meeting/Webinar	2
Business Development Series 2023 - Part 2	Online Meeting/Webinar	1
Essential Skills 2023 Session 3: APAC & EMEA	Online Meeting/Webinar	1
Essential Skills 2023 Session 4	Online Meeting/Webinar	1
Essential Skills 2023 Session 4 & APAC & EMEA	Online Meeting/Webinar	1
Essential Skills 2023 Session 5	Online Meeting/Webinar	1
Moore Ambition 2023: Session 4	Online Meeting/Webinar	1
Total		52



Walkthrough of the Talent Hub

A free-of-charge offering to all intranet users

The Talent Hub as Learning Management System (LMS)

1

Hosts a wide variety of courses

2

Accessed through SSO via the Moore Global Intranet

3

Integrates user's intranet profile (no additional profile)

4

Allows users to enrol themselves in courses

5

On-demand learning: Complete courses according to own schedule

6

Automatic, online certification upon course completion

7

Tracks learning (for individual users and firms)

8

Variety of reports at front end user- and firm-level

9

Provides each user with an AI-enabled, individualised learning dashboard

First 13 courses*

Pillar / Category	Sub-category	Course
Personal Excellence	Essential Skills	Helpful habits
		Virtual meetings that work
		Email etiquette
		Writing the Moore Way
Technical Excellence	Accounting	IFRS 17 Insurance contracts
		IFRS Hot Topics: Business combinations
		IFRS Hot Topics: Share-based payments
		IFRS Hot Topics: IAS 7 Statement of Cash Flows
	AML/CFT	Combatting money laundering, financing of terrorism and proliferation financing: An introductory course
	Audit	Audit toolkit walkthrough: General journal testing
Ethics	Ethics toolkit walkthrough: Ethical considerations for non-assurance services	
Network Excellence	ESG	ESG Awareness 101
	Technology	Introduction to Cryptocurrency and Blockchain

* New courses released monthly

Coming soon

Talent Hub LIVE in September 2023 (Detailed communication to follow)

Exciting monthly course additions to the On-demand Learning Library

Finalise additional firm integration options and packages

Adding all live learning events (webinars and conferences) to the Talent Hub (2024)

Global competency framework, mapped to all Talent Hub courses (2024)

Asset library – assets made available to the network for use in training, meetings, etc. (2024)



Interested?

Want to know more?

Contact Margie Alt

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European Update

EU ASIA DESK



Tax Advisory 税筹合规

- Tax
- Net
- In
- Tr
- Co
- In



Accounting & Payroll 会计、薪资表

- VA
- Mc
- Re
- Mc
- Arr



Audit 审计

- Statutory audit (relevant GAAP)
- Reporting package (IFRS, HGB, etc.)
- Internal audit and consultancy on internal audit and internal control
- Due diligence 尽职调查
- Other audit advisory 其他审计咨询



Legal Advisory 法律合规咨询

- C
- U
- P
- D
- G
- C



HR Consulting 人事咨询

- HR
- Re
- He
- Te
- Ad



Other Advisory Service 其他咨询

- International business negotiations 国际商务谈判
- Valuation of movable assets 动产估价
- Visa support 签证协助
- Rental address 办公场所租赁协助、信件处理
- Communications with government bodies 主管政府机关代理交涉
- IT & Cybersecurity & PR Consulting
IT & 网络安全 & 公关咨询



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CHALLENGES 2023

- How can we help you and help each other?
- Where do you see the opportunities?
- Is there a different approach?
- Where should we focus our attention?

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CHALLENGES 2023

- Which are the largest industry sectors in Germany?
 - Construction (€493Bn)
 - Automotive (€386Bn, 1.1M people, 15.5% of exports)
 - Mechanical Engineering (€212Bn, 1.1M)
 - Chemical Industry (€190Bn, 464K)
 - Electrical Industry (€186Bn, 880K)

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CHALLENGES 2023

China 14%	Poland 5.5%	Czech Republic 4.1%	United Kingdom 2.6%	Hungary 2.4%	Russia 2.0%	Ireland 2.0%	Japan 1.8%
Netherlands 8.1%	Italy 5.2%	Switzerland 4.1%	Turkey 1.8%	India 1.1%	Vietnam 1.0%	Norway 0.97%	South Korea 0.93%
United States 6.6%	France 5.0%	Austria 3.7%	Slovakia 1.4%	Malaysia 0.89%	Thailand 0.83%		
	Belgium 4.2%	Spain 2.7%	Sweden 1.3%	Bangladesh 0.73%	Bulgaria 0.68%		
			Romania 1.3%	Finland 0.71%	Indonesia 0.68%		
			Denmark 1.1%	Mexico 0.67%	Australia 0.65%	Libya 0.65%	
				Brazil 0.65%	Philippines 0.65%	Ukraine 0.65%	
				Serbia 0.65%			
United... 10%	China 6.9%	Austria 5.3%	Czech Republic 3.4%	Spain 3.1%	Hungary 2.1%	Sweden 1.9%	Turkey 1.8%
France 7.5%	Poland 5.8%	United... 4.8%	Denmark 1.5%	Mexico 1.1%	Australia 0.77%	Norway 0.74%	Portugal 0.72%
Netherlands 7.0%	Italy 5.6%	Switzerland 4.7%	South Korea 1.4%	India 0.97%	Greece 0.77%		
		Belgium 3.9%	Japan 1.4%	Russia 0.96%	Malaysia 0.54%		
			Romania 1.3%	Brazil 0.84%	Hong Kong 0.84%		
			Slovakia 1.1%	Canada 0.83%	Malaysia 0.83%	Ukraine 0.83%	
				Finland 0.83%	Israel 0.83%	Croatia 0.83%	
					Thailand 0.83%	Serbia 0.83%	
					Bulgaria 0.83%	Egypt 0.83%	

Imports

Mineral Fuels, Oils, Distillation Products 13%	Machinery, Nuclear Reactors,... 11%
Electrical, Electronic Equipment 13%	Vehicles Other Than Railway, Tramway 8.8%
	Pharmaceutical Products 5.1%

Exports

Vehicles Other Than Railway, Tramway 16%	Electrical, Electronic Equipment 11%
Machinery, Nuclear Reactors,... 15%	Pharmaceutical Products 7.6%
	Optical, Photo, Technical, Medical Apparatus 4.7%



CHALLENGES 2023

- Individual firm growth is still key, but now the challenge is to grow together
- Look at sectors – participate and take on leadership
- Look at Geographies – where to focus and who to collaborate
- Consider German challenges as an opportunity

‘A stronger and more resilient Germany’

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