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Global In-House Counsel Report 2025

Unique Insights into the Global In-House Profession

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INTRODUCTION

In-House Counsel Worldwide (ICW) and **Mondaq** are pleased to present the results of our second annual Global In-House Counsel Survey.

This report offers valuable insights into the current landscape and evolving trends within the global in-house counsel profession.

With global in-house counsel respondents from over 70 countries and feedback spanning all levels of job roles, the report delivers a comprehensive perspective on key areas including investment priorities, in-house activities, outsourcing, as well as several important people-focused topics.

We'd like to thank the global in-house community for their participation in our second annual survey, as well as our advisory board members for their sage counsel. Thank you also to our survey and report sponsor, Alexa Translations, for enabling us to further amplify the survey findings and analysis.

We hope this report serves as a valuable resource in helping you to make informed decisions about your, and your global legal department's priorities now and in the future.



In-House Counsel Worldwide (ICW) is a global network of member-associations that represent the legal professionals who work as corporate counsel and/or in-house lawyers within companies or organisations.

The primary mandate of ICW is to unite this community globally to share best practices, standardize competencies, promote standards and ethics, and collaborate to advance this sector of the legal profession for both the lawyers and their organisations.

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Mondaq delivers answers to legal, tax and compliance questions to an audience of over 20 million readers worldwide.

METHODOLOGY

In March 2025, ICW and Mondaq launched their second annual Global In-House Counsel survey.

The survey's aim is to provide unique insight into global legal departments and the global in-house counsel profession, by being one of the most comprehensive and representative surveys into the state of global in-house legal departments.

Over 400 respondents from over 70 countries, across different job levels, completed the 41-question online survey between early-March and mid-May 2025, with questions covering a number of areas that are important to global in-house legal departments and in-house counsel, including investment priorities, in-house activity, outsourcing, technology and innovation and people-focussed questions (including priorities, challenges, wellbeing and workplace).

This was followed by a voluntary self-identification section, which over 50% of respondents went on to complete.

To provide rigorous oversight and authority, the survey was designed in partnership with our survey Advisory Board, which includes eminent global in-house counsel.

Advisory Board



Steven Rotstein
President
ICW



Philippe Coen
Vice President
ICW



Daniel Choo
Co-President
Singapore Corporate
Counsel Association



Alison Lee
Chief Executive Officer
Corporate Counsel Association
of South Africa

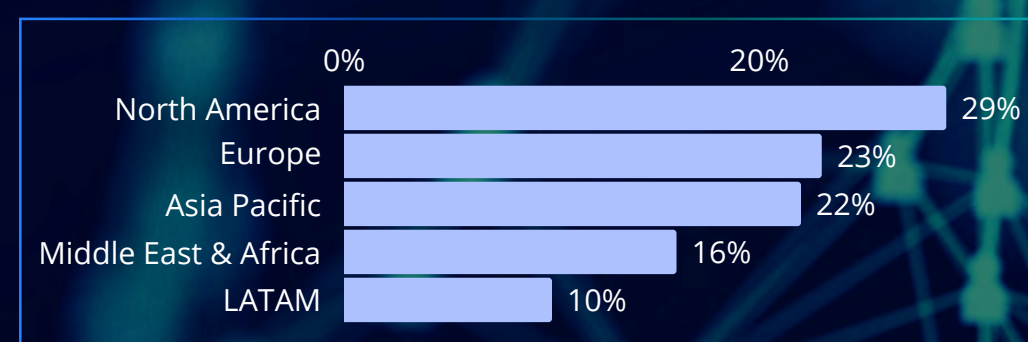
PARTICIPANT PROFILE

The survey responses have delivered the representative perspective we aimed for, with 43% of participants offering insights from top-level leadership (CLOs/GCs). Additionally, the survey reflects strong representation across global legal departments, with a notable proportion of Senior Counsel (14%), Counsel (10%) and Director of Legal Services/Legal Manager (18%).

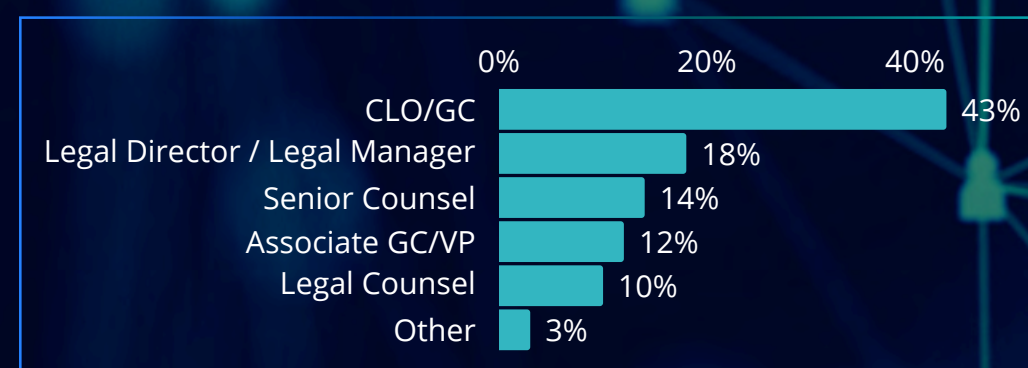
The survey saw strong participation levels from public companies (37%) and private companies (51%), reflecting a broad representation across key industry sectors and organization sizes. Additionally, government organizations (7%) and not-for profits (2%) contributed valuable insights, ensuring a well-rounded perspective on global in-house legal departments.

The survey responses are geographically diverse, offering a balanced regional perspective on the global in-house profession. Representation spans North America (29%), Latin America (10%), Europe (23%), Asia Pacific (22%) and the Middle East & Africa (16%). Additional details on survey respondents can be found in the Participant Profile charts to the right.

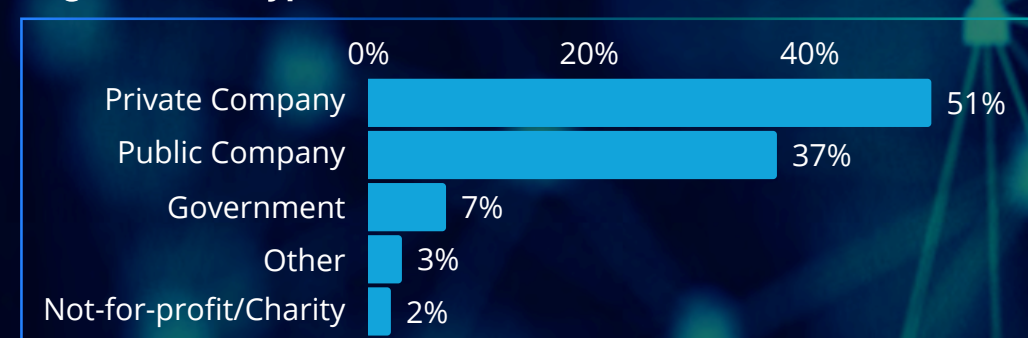
Location



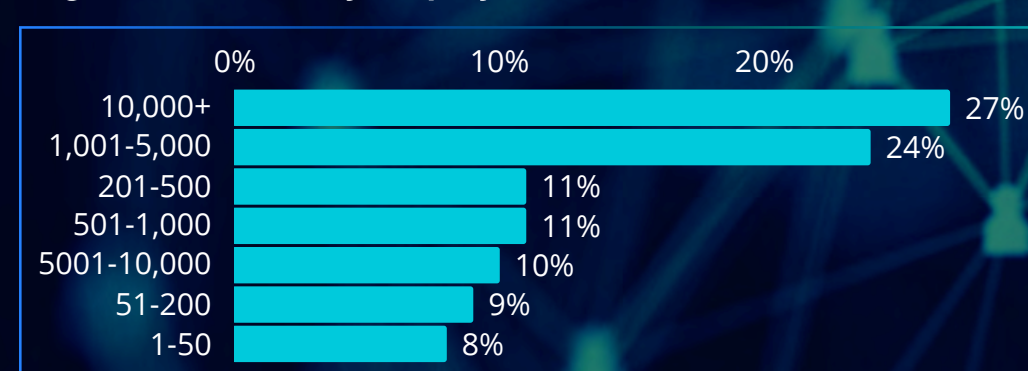
Role



Organization Type



Organization Size by Employees



EXECUTIVE SUMMARY

Against a backdrop of volatility in international trade, persistent geopolitical instabilities and uncertainty over AI and cybersecurity, In-House Counsel Worldwide & Mondaq's 2024 In-House Counsel Report explores the priorities, challenges and issues for in-house legal teams across the globe.

The extensive questionnaire and significant survey participation provide unique insight into the current state of global legal departments, the legal professionals who work within them – and their direction of travel for the coming year.

*Rising demand for in-house counsel to be more **deeply embedded** into the business of their organization*

In the current economic and political climate, we see rising demand for in-house counsel to be more deeply embedded into the business of their organization – and, in a number of cases, calls to do more with less in terms of budgets.

More than one fifth of respondents (21%) now expect a reduction in their global in-house counsel budgets over the coming year. However, almost four in ten legal departments still expect budgets to increase.

In terms of priorities, supporting business growth retains the top spot. But operational efficiency is at its heels, with one-in-five respondents rating this their main priority, particularly within public companies.

21% *of respondents expect a reduction in their global in-house counsel budgets*

Global In-house counsel are also expecting to play a broader role in their organization – with a substantial proportion of in-house counsel assuming accountabilities beyond their legal remit.

There are indications that Compliance is effectively becoming embedded as part of the legal function. Demand for support in company secretarial duties, ethics, investigations and government relations remain as strong as ever.

The increasing levels of accountabilities are reflected in widespread calls at all job levels for appropriate learning & development and effective employee support / wellbeing programs within legal departments.

More than half of all respondents (54%) report an increase in work-related anxiety and stress levels in the last year. The proportion reporting a decrease has dropped from 11% to 7% over the past year. Workload is identified as the single biggest challenge and the main driver of rising stress levels and for the second year running it is the standout top challenge of global in-house counsel.

A common theme is to focus investment on the additional people and technology needed to meet the rising demand for in-house services.

Need for appropriate learning & development and effective employee support / wellbeing programs

>400
Respondents



>70
Countries

For the second year running, two-thirds of companies globally expect to invest more in legal department technology with 79% viewing cost as the biggest barrier to adoption.

There is strong commitment to innovation with globally 70% prioritising innovation in legal and regulatory risk management.

The main driver by far is Artificial Intelligence & Generative AI. Over half of respondents cite it as the biggest single focus – three times the next most-rated topic, a substantial increase on last year's figures. Moreover, around 1-in-4 respondents cited AI skills gap as a main challenge.

70% *of respondents are prioritising innovation in legal & regulatory risk management*

Hybrid working models appear to have stabilized into regular patterns with more than two-thirds (69%) of respondents globally accessing such arrangements.

Around 1-in-5 in-house counsel work full-time in the office. Fully remote working is the least-favoured option but is rising fastest among public companies.

54% 
of all respondents report an increase in work-related anxiety and stress levels in the last year

In terms of how companies expect to use outside counsel, there is a steep rise in the proportion (25%) that now expect to reduce spending in this area. This closely mirrors the shift in spending plans on in-house resources and may reflect some companies responding more cautiously to the economic landscape around them.

In-house lawyers need to display understanding of the business as a primary capability

This year's survey reaffirms that in-house lawyers today need to display understanding of the business as a primary capability. There is also a strengthening of demand for both flexibility / adaptability and communication skills.

The combined demands for such business-aware skills and increasingly deep engagement with business-related accountabilities may indicate a rise in perceptions of the value that in-house counsel can contribute to the organization.

BUDGETS & INVESTMENT PRIORITIES

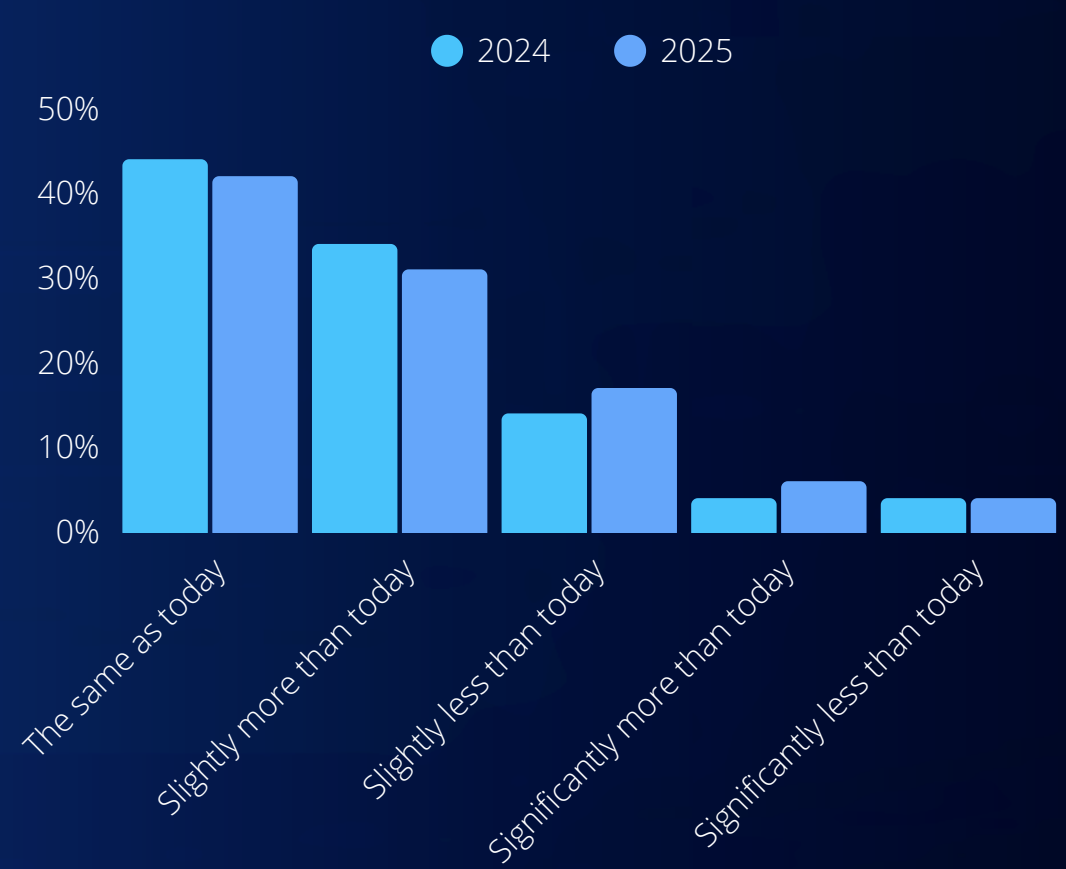
37% of legal departments expect to see budget growth over the coming year – broadly the same proportion as in 2024. However, more than one in five respondents (21%) expect their global in-house counsel budget to decline this year, an increase on 2024, and in some regions the increase in the number of organizations expecting to see budgets decline is stark.

Most of the growth is again likely to be within privately held companies. Here, 41% expect budget growth against 19% expecting decline, though the gap between these figures has narrowed.

Growth expectations are much weaker among public companies, where only 3 percentage points separate those expecting higher budgets (29%) from those expecting decline (26%).

Overall, more than three-quarters expect their legal department budget to grow or stay the same (81% private companies, 71% public). But each region reports its own distinctive picture.

Expected Size of The Total Global In-House Legal Department Budget Over The Next Year:



As last year, Middle East & Africa (MEA) headquartered organizations have the largest growth expectations of any region. 56% expect the total in-house counsel budget to rise, with just 13% expecting a decline. Almost one in five respondents (18%) also expect that budget growth to be ‘significant’ – up from just 4% on last year.

There is strong resilience in the North America region, where 35% expect to see a budget increase – up from 32% last year. Also, the proportion expecting budget decline has fallen from 21% to 16% for the coming year.

Legal department budgets in Europe are under pressure. More than one in four firms (28%) now expect legal budgets to decline. That figure is a dramatic 40% higher than last year. The figure for companies expecting budget growth remains level at 33%.

Asia Pacific organizations also indicate a tightening of budgets. Here, the proportion expecting budget growth has fallen almost a third to 30%, while the number expecting budget decline has doubled to 17%.

Technology remains the top priority for investment by a significant margin

Legal technology spend growth also continues to be strong across other regions. In Europe 13% more respondents expect increased investment; 8% more in North America. With two-thirds of companies expecting higher investment, technology is again the highest area for budget growth in both regions.

68% of legal departments expect to spend more on Technology

Staffing is once again the next main beneficiary of additional investment, with 40% of companies globally expecting budget growth for in-house staff. The figure is slightly up on last year and broadly consistent across regions.

Middle East & Africa is an exception, where the figure of 47% is a sharp contraction on last year’s 67%. But this may represent a re-normalization following a spell of intense growth.

For a second year, around one third of global legal departments expect to increase their spending on outside counsel.

It is worth noting that the number of public companies expecting to reduce spending on outside counsel has risen to 3 in 10 – perhaps countered by larger increases in staffing and technology spend.

~1/3 of global legal departments expect to increase their spending on outside counsel

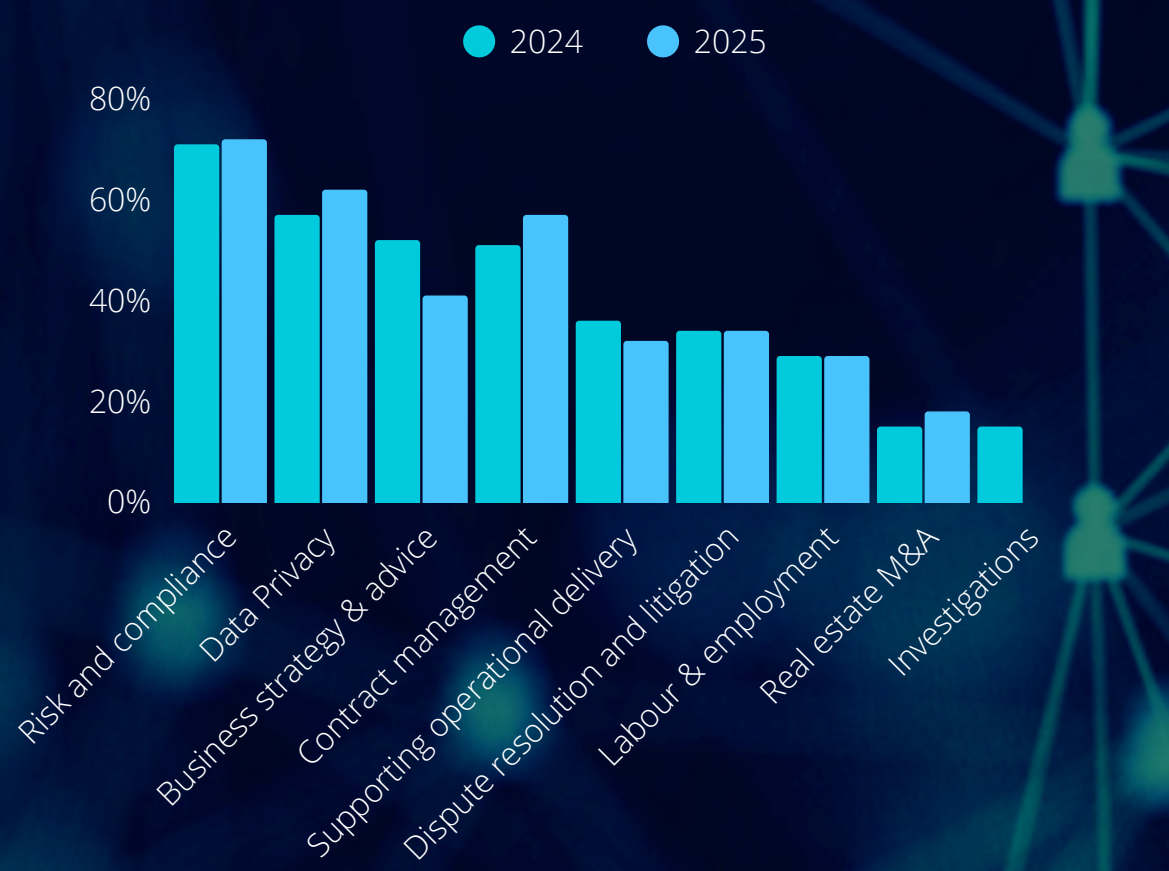
Europe is again the only region where a higher proportion of companies expect to reduce external counsel spending – rising three points to 31%.

Europe is also strengthening expenditure on ALSPs, with 22% of respondents expecting increases, up from 15% in 2024. It is a similar picture in North America where 33% expect to spend more on ALSPs compared to 26% in 2024.

Rising pressure from in-house demand appears to be the trend driving additional investment in both technology and headcount.

Looking at expected increases in activity across a range of areas, global in-house departments expect to see greater focus on Business Strategy & Advice. Over half (52%) of respondents cited this as a key growth area for the coming year, markedly higher than last year’s 41%.

Expected Increase in In-House Demand:



There is a smaller rise in expected activity around Supporting Operational Delivery, up four points to 36%. Responses indicate reducing focus on both Contract Management and Data Privacy – with expected increases in activity edging down several percentage points to 51% and 57% respectively in each area.

So, while demand for in-house services looks set to rise significantly, investment in additional people and technology is expected to scale up to meet that demand.

Outside Counsel

One-third of all legal departments expect to increase expenditure on outside counsel in the coming year. This is modestly higher than last year’s 32%. But the figure is offset by a larger rise in the proportion expecting to reduce spend on outside counsel, which now stands at 25%.

While the reliance on external counsel remains strong, the overall shift in spending may reflect the sustained high levels of increased investment in in-house department staffing.

Public companies offer the strongest evidence to support this. Here, 3 in 10 now expect to reduce spending on outside counsel, while increases in both staffing and legal department technology investment remain high.



Across the regions, for the second year Europe is the only region where a larger proportion (31%) expect to reduce spend on external counsel, over the 24% that expect to increase it. 24% of LATAM respondents also expect spend to reduce. The largest increases are once more expected in North America (36% of respondents) – but most of all in Middle East & Africa (41%).

Looking at volumes of outsourced work, there is a shift among public companies to outsource less to outside counsel. A higher proportion (29%) now expect to reduce the amount than to increase it (24%) – widening the gap on last year’s figures.

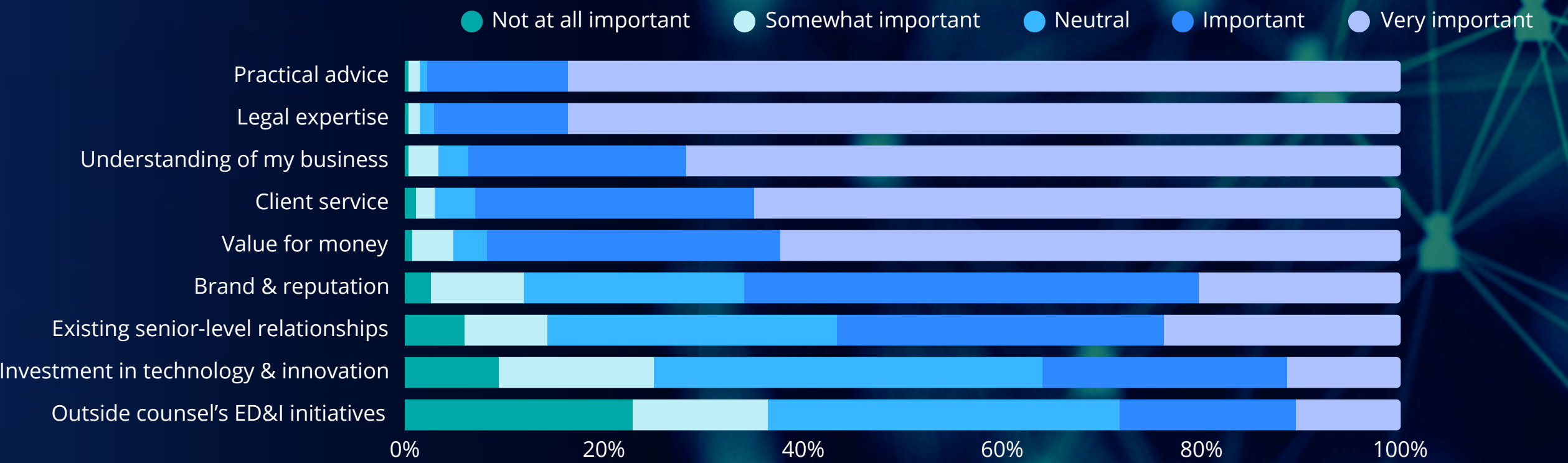
Private companies are shifting the other way, with an even greater swing towards more use of outside counsel. 35% expect to increase outsourcing – up from 24% – while the proportion expecting to reduce outsourcing has shrunk from 30% to 20%.

Notable increases in the numbers that rate business understanding and value for money as ‘very important’

Regionally, only Asia Pacific has a higher figure for respondents expecting to outsource less work to external counsel.

The crucial factors for selecting outside counsel are very similar to 2024, with near-universal consensus on the top five most important factors: practical advice (98%), legal expertise (97%), understanding of the buyer’s business (94%), client service (93%) and value for money (92%). But there are notable increases in the numbers that rate business understanding and value for money as ‘very important’ – rising to 72% and 62% respectively.

Important Factors When Selecting Outside Counsel:



These buy-side drivers are broadly shared across both public and private companies but with one significant difference. A fifth more private companies (91%) than public companies (78%) rate Practical Advice as ‘very important’ to their selection decision-making. Fewer than 1 in 4 companies (24%) still rate existing senior-level relationships as very important.

The priorities are broadly consistent across regions and year to year – with the one notable call-out that North American companies (75%) still outstrip other regions in placing client service as very important.

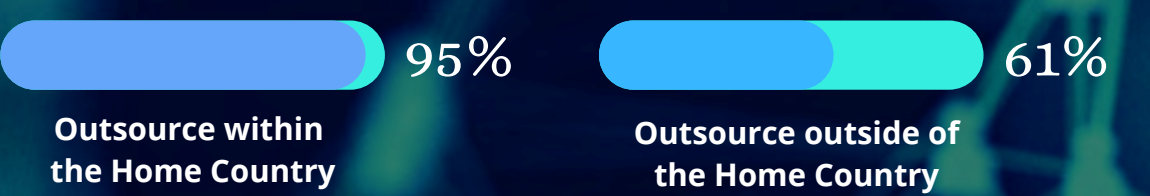
Other than minor variations between regions and year to year, the types of work most likely to be outsourced are closely aligned with last year’s findings.

Top Four Requirements for Outside Counsel:



There is a clear ‘top four’ of requirements from outside counsel across both private and public companies, and across all regions: expertise in areas new to the organization (70% of respondents), expert opinion on specific activities or transactions (66%), support for a lack of internal capacity (55%) and advice on emerging areas of law (53%).

When Outsourcing:



Other Outsourcing

In keeping with 2024, one-in-five of all in-house legal teams use ALSPs for services that law firms would traditionally offer. The figure is highest in Asia Pacific where almost 3 in 10 organizations (29%) will use ALSPs – up from 25% in that region last year.

But it is worth noting that, overall, 28% of companies do expect to increase their level of spending on ALSPs in the coming year – almost a fifth more than planned to do so last year.

The type of work most likely to be outsourced ranges from contracts – including Non-Disclosure Agreements – to regulatory work and litigation.



INNOVATION & TECHNOLOGY

Innovation

Commitment to innovation continues to strengthen. Globally 70% now say innovation in legal and regulatory risk management is a priority for their organization. In terms of primary focus, one area in particular is beginning to outstrip all other contenders – Artificial intelligence & Generative AI.

56% of respondents cite this as their single biggest focus for innovation, making AI by far the most prominent area.

56% *of respondents cite AI as their biggest focus for innovation*

To put this in context, that figure is 27% higher than last year (12 percentage points) – and, this year, three times as many respondents gave AI as their top priority over the next most-rated innovation area, Contract Management. Last year it was only double the number. While AI innovation is the out-front leader globally, there are regional differences in other priorities.

Contract management remains a key area globally for 17% of respondents.

There is also focus on Document management in both Asia-Pacific and Middle East & Africa (20% and 15% respectively).

Last year's third most prevalent subject, Digitalization (becoming paperless) has fallen back significantly as a priority for most regions. But it retains a high level of interest in Middle East & Africa (MEA) with 22% of respondents innovating in this area.

16% of organizations in Asia-Pacific also list Process management innovation as a key priority.

Technology

Investment in legal department technology is set to rise for a second year, with 68% expecting an increase in investment – a 10% increase on last year's numbers. The proportion of respondents that expect to reduce technology investment has halved to just 3%.

Investment in technology is set to rise for a second year

Overall, two-thirds of organizations globally cite investment in legal technology as a priority. But this view is significantly more prevalent among privately owned companies (71%) than public companies (60%).

Cost remains the greatest barrier to technology adoption

Geographies broadly concur that most investment growth is expected to be in four technology areas.

Contract lifecycle management and contract automation will be the key priorities. Each area was cited by around 42% of respondents – sustaining the 2024 levels – closely followed by Document Management at 40%.

In the fourth main priority area, Data privacy & security management, growth in spending appears to be slowing considerably. Almost a third fewer expect to spend more in this area, 34% compared to last year's 49%.

Number of Organizations Expecting to Invest More in These Technologies:

43%

Contract automation

43%

Contract lifecycle management

41%

Document management

34%

Data privacy & security management

Looking across different regions, in North America there is evidence of accelerating growth in investment. It is less so in Europe where, for instance, spend growth on data privacy was likely driven by demand for GDPR compliance.

Another significant regional variant is in Middle East & Africa, where Legal Research / Precedent Database technology is the largest category for technology investment growth, identified by 37% of respondents.

As last year, organizations globally expect to see more growth than decline in technology investment in the areas of workflow management, e-signatures, and Legal research/precedent databases.

Cost remains the greatest barrier to technology adoption. Consistent with last year, 79% of respondents gave this answer globally.

Lack of integration with other technologies within the organization also features strongly again. But the figure is down significantly from 54% to 41%, perhaps indicating progress in this area.

A quarter of respondents (24%) gave AI skills gap – a new category from this year's survey – as a main challenge to legal department technology adoption.

PRIORITIES & CHALLENGES

Priorities

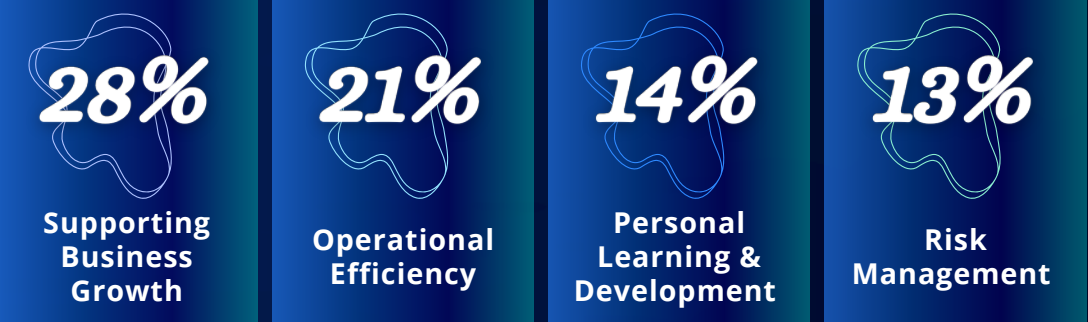
More than 1 in 5 in-house counsel (21%) rate Operational Efficiency as one of their top priorities for the coming year.

>1/5 of respondents rate Operational Efficiency as one of their top priorities

This puts operational efficiency firmly into what is now a ‘top four’ of main priorities. Supporting Business Growth retains the top slot with 28% responding. Together with Personal Learning & Development (14%) and Risk Management (13%), the proportions are broadly consistent with last year’s results.

However, there is a difference of emphasis within different types of organization. Supporting business growth is strongest within private companies, where 33% cite it as their top priority against 28% within public companies.

Top Four Business Priorities:



Conversely 22% of respondents in public companies gave Operational efficiency as their main priority, against a much smaller 13% within private companies. Once more, viewpoints vary significantly across different levels of the organization.

Supporting business growth and Operational efficiency are equally the most common top priorities for over a quarter of GC/CLOs (26%).

For Legal Directors/managers the figures are more nuanced: 28% for growth and 20% for efficiency. Here 13% of respondents also cite Staff/team support and wellbeing, placing it in the top three priorities at this level.

Senior Counsel (27%) and Counsel (38%) see their own Personal learning and development as by far the top priority. At this level though, the proportion of respondents prioritizing Support for business growth is in keeping with more senior counterparts – at 18% and 29% respectively.

Demand to provide appropriate L&D programs to support staff growth and retention

This reinforces evidence within last year’s survey of a demand on Legal department leaders to provide appropriate learning and development programs to support staff growth and retention.

The regional picture signifies a marked change from last year, with almost all regions aligned in placing Supporting business growth as their main priority. This is once again strongest in North America, where it is ranked the top challenge for 38% of respondents – nearly three times as many as the second most common top priorities, Operational efficiency and Personal learning & development, on 13% each.

In Europe the figure is 32% – surpassing last year’s top priority, Risk Management – and in Asia-Pacific it’s 26%, taking Supporting business growth well ahead of last year’s main focus of Personal Learning & Development. But Middle East & Africa bucks the global trend with almost a third (32%) ranking Operational efficiency as their top priority, and only around 1-in-15 citing Supporting business growth.

Challenges

This year’s survey again flags the potential for an employee wellbeing and mental health crisis.

As in 2024, more than half of all respondents (54%) report an increase in work-related anxiety and stress levels in the last year. The proportion reporting a decrease has dropped sharply from 11% to 7% over the past year.

The pressure is highest in public companies, where the numbers reporting increased anxiety / stress has risen from 52% to 57%. The rate of increase has slowed in private companies (from 55% to 50% of respondents) but remains worryingly high.

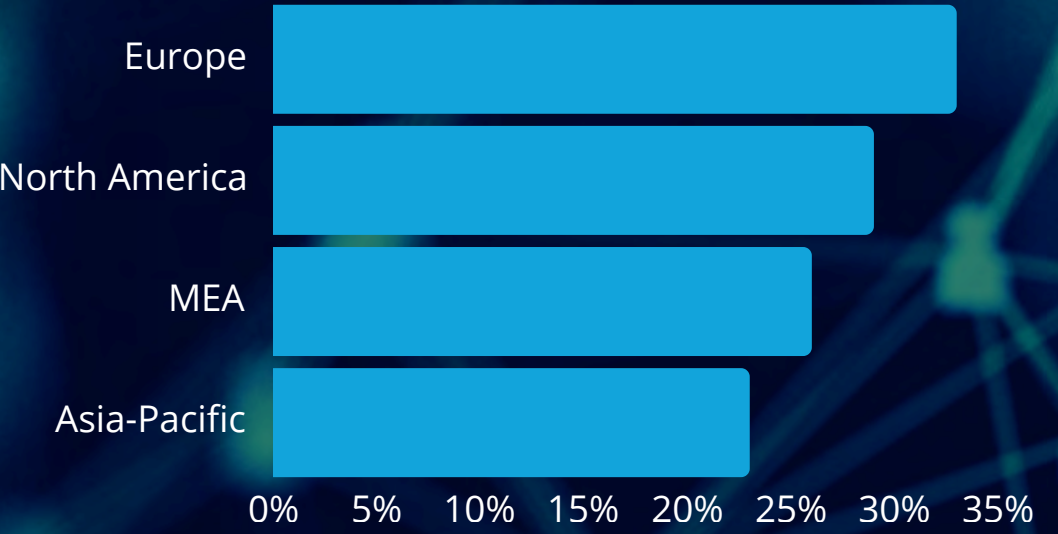
54% of respondents report an increase in work-related anxiety and stress levels

Workload / volume of work is widely identified as the single biggest challenge and the main driver of rising stress levels.

For the second year running it is the standout top challenge for 28% of global in-house counsel. Regulatory change (13%) remains the second highest-ranked challenge, with Litigation (at 11%) replacing risk management as the 3rd-placed challenge that companies expect to face.

Across the regions, workload challenges again clearly lead by some margin, with the highest proportion of responses in North America (29%), LATAM (29%) and Asia-Pacific (23%) – this year joined and outstripped by Europe (33%). It’s a different story in Middle East & Africa, where 26% rank Litigation as the greatest challenge.

Workload is the #1 Global In-House Counsel Challenge:



Almost a third of all companies (32% public, 30% private) – the greatest proportion by far – rate workload/volume of work as their main challenge.

15% of respondents in public companies are looking at Litigation as their next biggest challenge, with regulatory change and risk management behind that (9% each).

~1/3 of respondents rate workload/volume of work as their main challenge

The challenges for private companies are less concentrated, with Regulatory change (16%) and AI compliance and/or implementation (12%) being most to the fore.

The broad consensus over workload as the greatest challenge is echoed in the responses from individuals too, with figures across all four role areas ranging from 25-33% of respondents. 22% of Senior Counsels also rate understaffing as among their greatest challenges.

Beyond workload, Regulatory change, Litigation, Risk management and AI compliance / implementation also feature prominently in responses across different roles.

22% of Senior Counsels rate understaffing as among their greatest challenges

Skills and Responsibilities

This year’s survey reinforces the fact that a great majority of in-house counsel shoulder significant accountabilities outside their legal remit.

67% of in-house counsel gave compliance as a key additional responsibility. While this is a few percentage points down from last year’s remarkable 74%, is two-thirds higher than any other additional responsibility.

Majority of in-house counsel shoulder significant accountabilities outside their legal remit

The geographic picture is broadly consistent for compliance, never falling below two-thirds of respondents in any region and reaching 78% in Middle East & Africa.

While all responses ease back somewhat on the 2024 figures, this perhaps suggests that compliance may be increasingly accepted as an integral part of the legal function.

The range of non-legal accountabilities is as wide as ever. Company secretarial duties (40%), ethics (39%), investigations (30%) and government relations (28%) dominate the field for a second year.

In-house counsel in private companies appear to be picking up more accountability than their public company counterparts. Response rates are higher in every category from private companies. This may suggest that public companies rely more on specialist support in particular areas, such as investor relations.

More than any other job level, GC/CLOs are carrying significant additional responsibilities

More than any other job level, GC/CLOs are again carrying significant additional responsibilities. In line with last year, the four main areas are compliance (75%), company secretarial (55%), ethics (47%) and investigations (34%) – although these levels are a shade lower on 2024.

Counsel taking responsibility for Environmental, Social & Government (ESG) matters appears to have stabilized, cited by around 1-in-5 respondents in most regions. But the figure is lower in Europe at just 12%.

The key skills needed to be an effective in-house lawyer are once more led by Understanding The Business – which is the standout priority globally among all respondents.

But respondents this year give increased weighting to the importance of flexibility / adaptability, communication skills and giving practical advice. Flexibility / adaptability is a much stronger second among private company lawyers, which may be in response to the breadth of demand in terms of additional accountabilities.

Key Skills to be an Effective In-House Lawyer:

Understanding
the Business

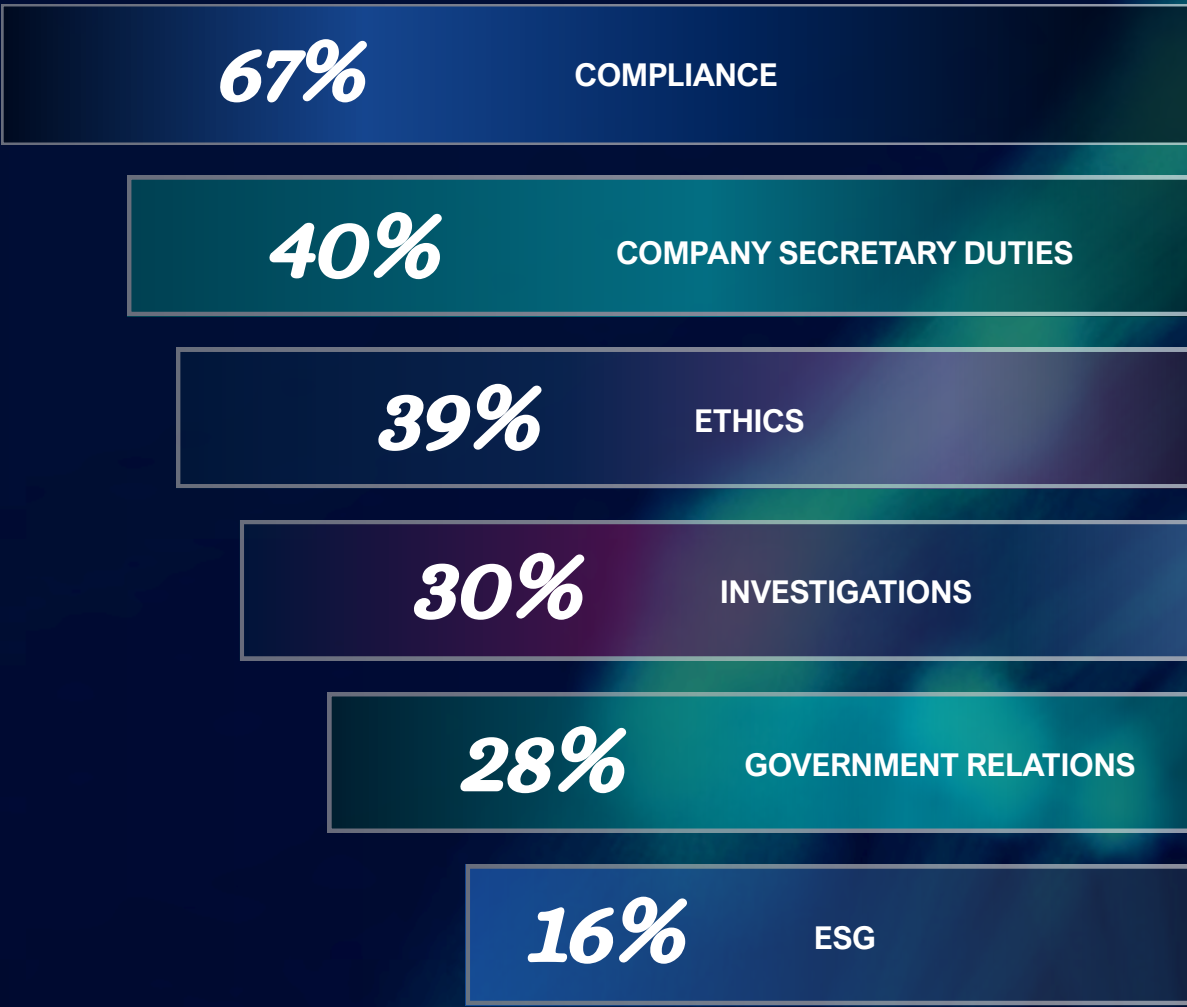
Flexibility/
Adaptability

Communication
Skills

Practical
Advice

Regional preferences appear similar to last year. North America rate communication skills more highly than other regions. Europe and Asia-Pacific favor flexibility / adaptability more highly, while Middle East & Africa rate Legal knowledge the highest.

In-House Personnel Accountability Beyond Legal:



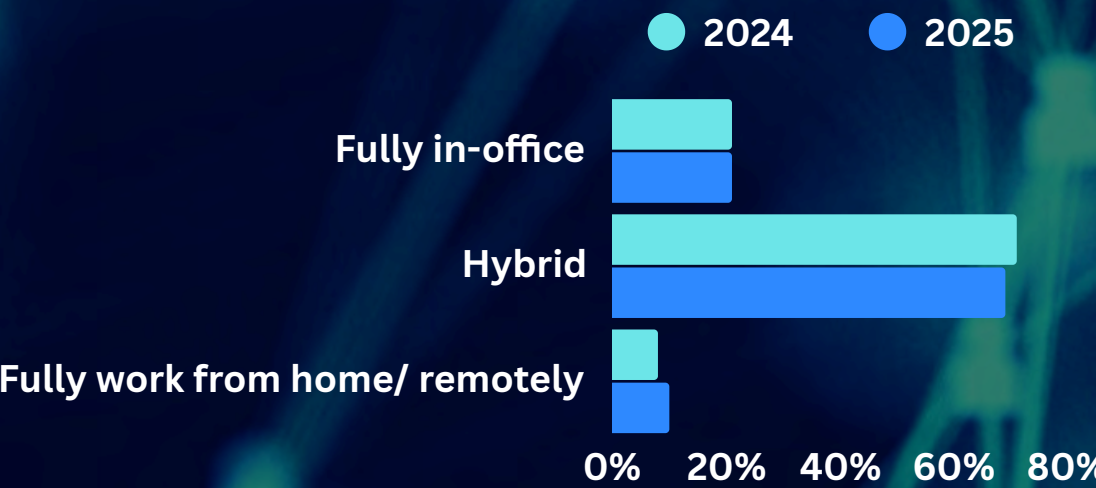
Hybrid Working

Hybrid working is evidently here to stay, with patterns beginning to stabilize across regions and types of company.

More than two-thirds (69%) of companies globally provide hybrid working arrangements , just two points down from last year. Full-time office working appears to be levelling off at 21%.

10% of in-house counsel now work from home or remotely full-time, a little up on 2024. This is still more common in private companies (14%). But uptake has increased from 5% to 8% in public companies, where fully office-based working has a corresponding drop from 19% to 16%.

Remote/Hybrid Working Arrangements:



Hybrid arrangements in both public and private companies are about level with last year’s figures – at around three-quarters (76%) and two-thirds (66%) respectively.

Nearly half of companies globally (48%) now mandate 2 or 3 office days a week – a small but a significant step up from last year’s 43%. It will be interesting to see if this arrangement gains traction among a majority of all organizations next year. However, there is a year-to-year increase in the numbers of both public and private companies mandating three or more days in the office.

Similar to last year, 22% of organizations mandate 5 days a week as office days, while 16% don’t apply a mandate. At a regional level, the fully in-office model is most prevalent in Middle East & Africa at 54% and least so in North America (7%). This preference is reversed for fully remote/home-working, which stands at 25% in North America, just 3% in Middle East % Africa (MEA).

As last year, Europe favours hybrid working arrangements most highly (77% of organizations, followed by LATAM (73%) and Asia Pacific (71%), with North America and Middle East & Africa each at around the same level as 2024.

69% of companies globally provide hybrid working arrangements

Challenges remain broadly consistent across region and types of company. But there appears to be a subtle shift towards human-centered concerns. As last year, 29% of respondents rank employee engagement as either challenging or extremely challenging. This appears to feed into Employee Retention as an issue, which remains constant at 16%.

Meanwhile, challenges with handling remote workers and producing sensitive data (20% of respondents) has overtaken problems with adopting new technologies to enable hybrid working.

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