MANAGING THE GLOBAL MOBILITY FUNCTION

A benchmark study 2016

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FOREWORD

A message from Bill Graebel

Bill Graebel SGMS
CEO
Graebel
Companies, Inc.

Graebel is pleased to co-sponsor the 2016 Managing the Global Mobility Function survey with the Forum for Expatriate Management. This annual study provides compelling information that can help global mobility professionals and service providers alike gauge evolving needs and trends in our dynamic industry.

Staying close to the customer has always been a core part of the Graebel culture. For over a decade we have hosted policy summits, roundtables and forums worldwide, giving leading mobility executives a platform to candidly share their relocation and assignment management program successes. We also spend a significant amount of time at these events brainstorming innovative solutions to some of their biggest challenges. We value these sessions greatly and learn as much as our clients do through the discussions

I hope the findings from this year's Managing the Global Mobility Function survey will be valuable to you – and I encourage you to consider them as you evolve your program in the months and years to come.

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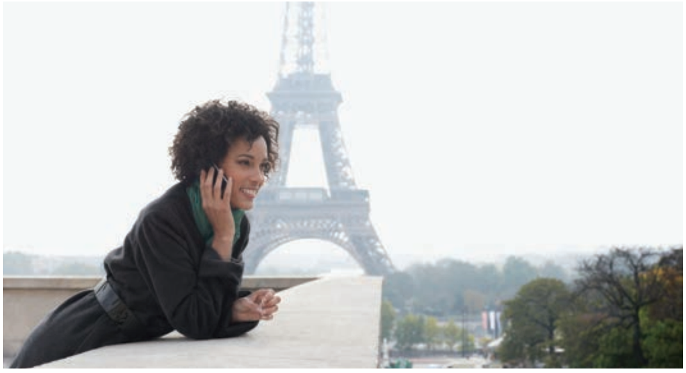

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INTRODUCTION

Courtney Ellis-Jones
Content manager
The Forum for Expatriate Management

The Forum for Expatriate Management (FEM) welcomes you to the seventh annual Managing the Global Mobility Function survey, in which we explore the most pertinent questions from heads of global mobility worldwide who seek to maintain their teams according to best practice.

We had 165 respondents, of which well over half were either global mobility managers or global or regional heads of global mobility.

The strategic role of global mobility inside firms is expanding annually. It is becoming one of consultancy, helping to not only manage but define the policy, process and governance of moving the right talent into the right location.

As globalization continues at high speed, naturally there is an overall expectation of an increase in assignment initiations over the next 12 months.

The good news is that many global mobility teams believe they are resourced correctly for this. After the growth period in global mobility, we are reaching a stasis where not only do teams feel prepared and staffed but most expect to remain the same size.

As a result, training is shifting from fundamental understanding to strategic objectives. We observed a trend in the union of global mobility teams with wider business for talent management, as teams recognize the importance of aligning strategically with other parts of their business in new ways.

We are thrilled to have had such an excellent response to this survey and thank all who took part. A full list of participating organizations and 'name-checked' service providers is included in the appendices.

FEM's mission is unchanged: to create an online and real-world community where global mobility professionals can unite, learn and grow through the distillation of best practice. Thank you for contributing to our success.

EXECUTIVE SUMMARY

We had 165 respondents and have produced data based on program size and trends over the past year. Among the respondents, 26.7% were global heads of mobility, 9.7% were regional or country heads of global mobility and 13.9% were global mobility managers. For the first time we saw a significant rise in the number of holders of other roles, highlighting an increasing trend across the function to welcome directors of benefits, international human resources, global human resources operations and reward. The continued presence of payroll, reward and talent as reporting lines for global mobility was evident.

The key findings of our survey are as follows:

Where does the global mobility function sit in the organization and where should it sit?

• 40.1% of global mobility teams reported to either compensation and benefits or reward. This number is down by 9.9% from 2015. Those reporting directly to VP human resources remained stable at 26.1%.
• Reporting to talent management has continued to increase but more slowly in 2016, moving from 9% to 9.9%.
• There was a rise in those reporting to HR shared service teams, as well as shared operations teams.
• While both small and large programs were more likely to report to compensation and benefits (43.1% and 39.1% respectively), large programs were marginally more likely to report to VP human resources (differential of approximately 1%) or talent management, with 13% of large programs reporting to talent versus 8.3% of small programs.
• When examining where respondents believed global mobility should sit, nearly a quarter (24.8%) believed it should report to talent management.
• Respondents were divided on whether global mobility should report to VP human resources or to compensation and benefits, with 32.6% opting for either.
• The percentages of small and large programs that believed they should report to talent management were nearly the same, while rising from 2015. The 'Other' category revealed a growth in newer, more sophisticated functions such as retention and talent acquisition, and more holistic combinations of reward, benefits, payroll and talent.
• 42% of global mobility teams in our survey were centrally located in one location. However, when segmented as small or large programs, 45.7% of large programs had moved into structuring their team around a center of excellence with regional hubs.

How has global mobility grown as captured by assignment initiations and changes to internal global mobility teams?

• Assignment initiations increased over the year but there was an overall reduction in firms initiating fewer than 25 assignments, falling from 37% in 2015 to 29.9% in 2016. Those with 500 or more new assignments remained fairly stable, while growth was seen among firms with 251-500 assignment initiations.
• Nevertheless, just over half of respondents initiated 75 or fewer assignments.
• Long-term assignments remained the most popular at 44.4% of all initiations. Local transfers rose during the year, capturing 25.39% of all initiations and overtaking short-term assignments in popularity.
• 20% of global mobility teams aimed to increase their team in the next 12 months, with 14.1% planning to reduce it and 65.9% intending to stay the same. More teams reduced their size last year than in 2016, while there was a fall in those keeping numbers the same, and the number of teams that grew in size remained stable.
• Nearly 60% of global mobility teams felt they were resourced correctly. Only 3% thought they were over-resourced.
• The average number of employees in a global mobility team was 11.7. Small programs had an average of 4.8 people while large programs were staffed by 22.3 individuals.
• The average paybill for a global mobility team was $588,651.5. Opinion varied greatly about the costs of maintaining internal programs.

Which services are outsourced?

• The top three outsourced services among respondents were tax (87.3%), immigration (79.4%) and removals and household goods (76.5%). Both tax and immigration retained their

position from 2015 but removals and household goods replaced relocation and destination services in third place.
• While large programs were more likely than small programs to outsource overall, small programs were more likely to outsource assignment and vendor management, relocation and destination services, payroll and expense management.
• 16.3% of respondents were planning to change their relocation and destination services provider in the next 12 months, with 15.1% intending to change their provider of immigration services.

How is vendor performance being managed?

• Over the past year, reliance on assignee 'noise' to monitor performance has declined. It now sits equal with reliance on vendors, at 34.1%.
• The trend of conducting a formal survey internally has continued to rise. The average for all global mobility teams was 29.7% but nearly half of large programs said this was how they managed vendor performance.
• Small programs were still likely to rely on assignee 'noise' ahead of vendors or surveys.
• Few organizations benchmark their vendors against similar corporations.

How often do organizations go to RFP?

• Most organizations often found implementation painful, hence they did not change vendor inside three years. Technology and cost-of-living data providers were least likely to be changed quickly, perhaps unsurprisingly given the time and scope needed to transfer to new software.
• International medical cover was the only service likely to be reviewed on a two-year basis.
• Global Mobility Directors remain the most important part of the RFP process with 75.9% indicating their significant involvement. Procurement, at 64.4%, came in second, and then the VP HR at 33.3%. The importance of involving VP Tax and General Counsel/Legal in an RFP were also stated.

Vendor performance ratings

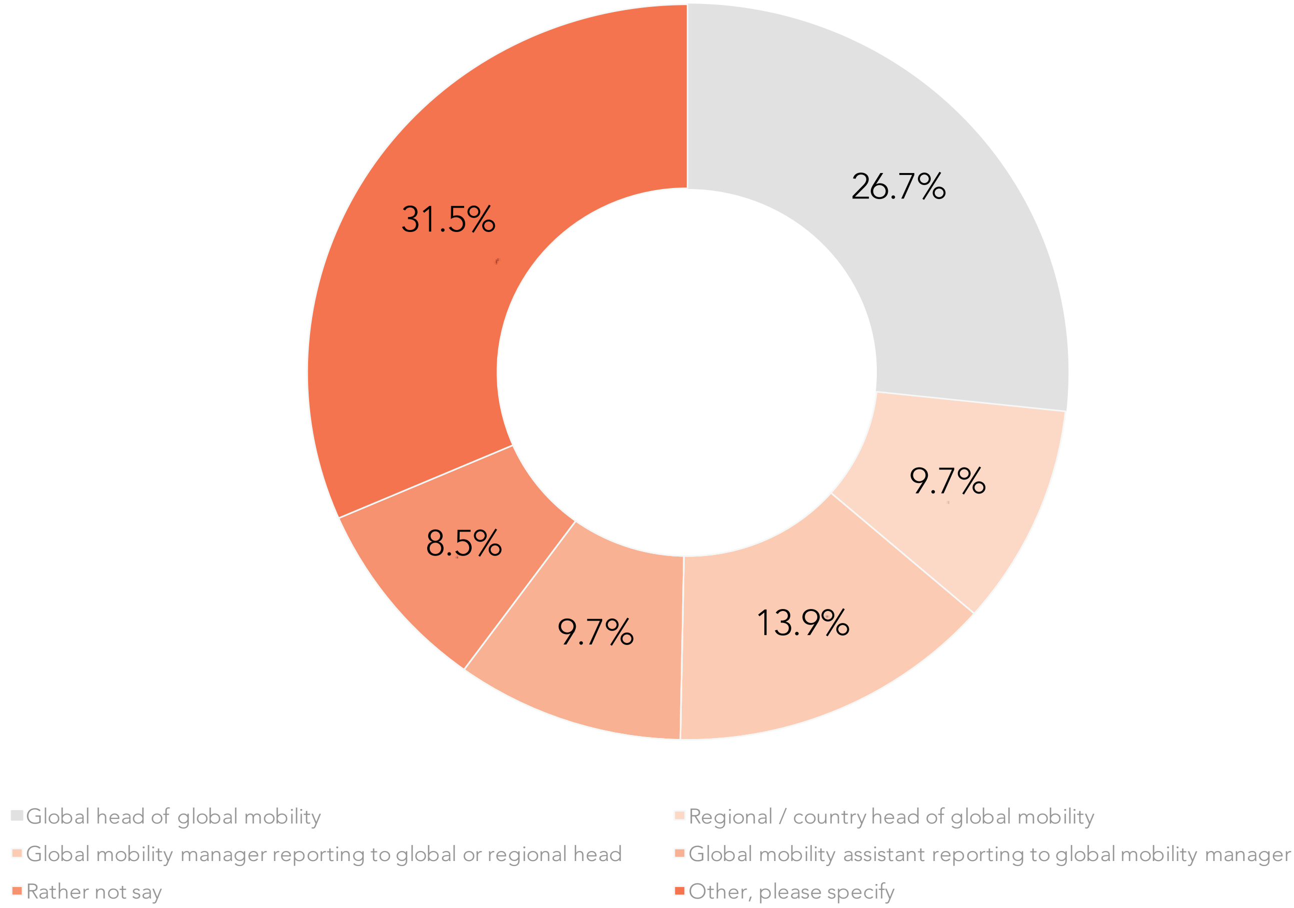
• Overall services were seen as good. This is a fall from many being recognised as excellent over the past year, but the growth for being seen as "good" saw reductions in reasonable service and poor, which is fantastic news for the vendor pipeline.
• The importance of robust relationships between vendor and corporate mobility professionals was increasingly highlighted and remains a trend going into the latter half of 2016: robust, holistic working relationships are required for in-house mobility to deliver their service at the highest ability.
• Immigration was highlighted as the service most likely to be seen as offering an excellent quality of service.
• No services captured more than 10% in being seen as poor or very poor.
• Almost all services were seen as 50% in "good" quality.
• Technical competence, however, revealed a general idea that most service providers were seen as pretty much the same or only marginally ahead of their competitors. This is valuable insight for differentiation and should be considered when going to RFP. How can you ensure you are selecting a vendor who is a long way ahead of their competitor?
• Technology was seen as the service where technical competence was divided between a long way ahead or marginally better.

An insight into the current market

• The Big Four continued to dominate the market for tax services, with Deloitte growing its share.
• Fragomen remained superior in immigration but the emergence of small firms in this field could not be ignored. Immigration consistently has the longest list of other providers used.
• Equus narrowly retained the largest portion of the technology market but Polaris continued to grow, particularly in the Americas and EMEA.
• Cartus remained dominant in assignment and vendor service.
• For relocation and destination services, however, we saw a trend towards multiple vendors. For an overall capture of the market, Cartus retained the lead, but more than 40% of respondents used other, unnamed, providers.
• Removals and household goods also followed this trend, with approximately three-quarters of respondents using a variety of vendors – some in the US often in partnership with each other. In Asia, however, there was a trend to use trusted names, such as Asian Tigers, SIRVA and Interdean/Santa Fe.
• Mercer continued to dominate the cost-of-living data providers but was challenged once more by ECA, particularly in EMEA.
• Oakwood consolidated the market for serviced accommodation, showing a trend towards centralization and single points of contact for corporate lines.
• ADP and Deloitte dominated the payroll landscape, with Deloitte flexing up in APAC and down in the Americas. ADP captured the largest share in all three regions.
• Cigna once again was the most popular provider of international medical cover.
• Expense management had the most respondents but Cartus retained the largest market share. As more relocation management firms take on a data reporting role for their clients, Cartus's market share is expected to grow.

PARTICIPANT DEMOGRAPHICS

Which of the following corresponds most accurately to your job role?



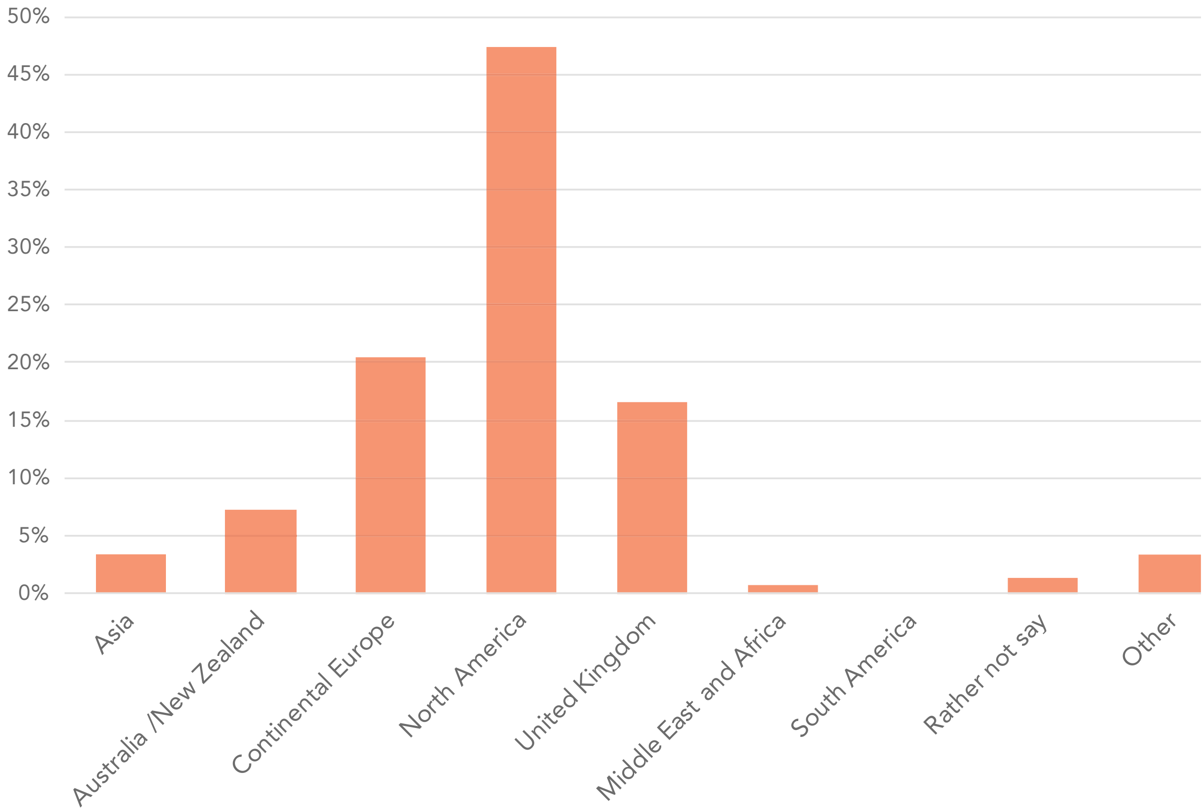
For the first time, we saw a spike in those identifying with new roles. The rise of consultants and freelancers inside the global mobility function cannot be underestimated.

Within compensation and benefits the number of directors and managers has risen, as has that of reward specialists and managers with an overall responsibility within global mobility. This increase in other departments' remit to take on global mobility roles is fascinating.

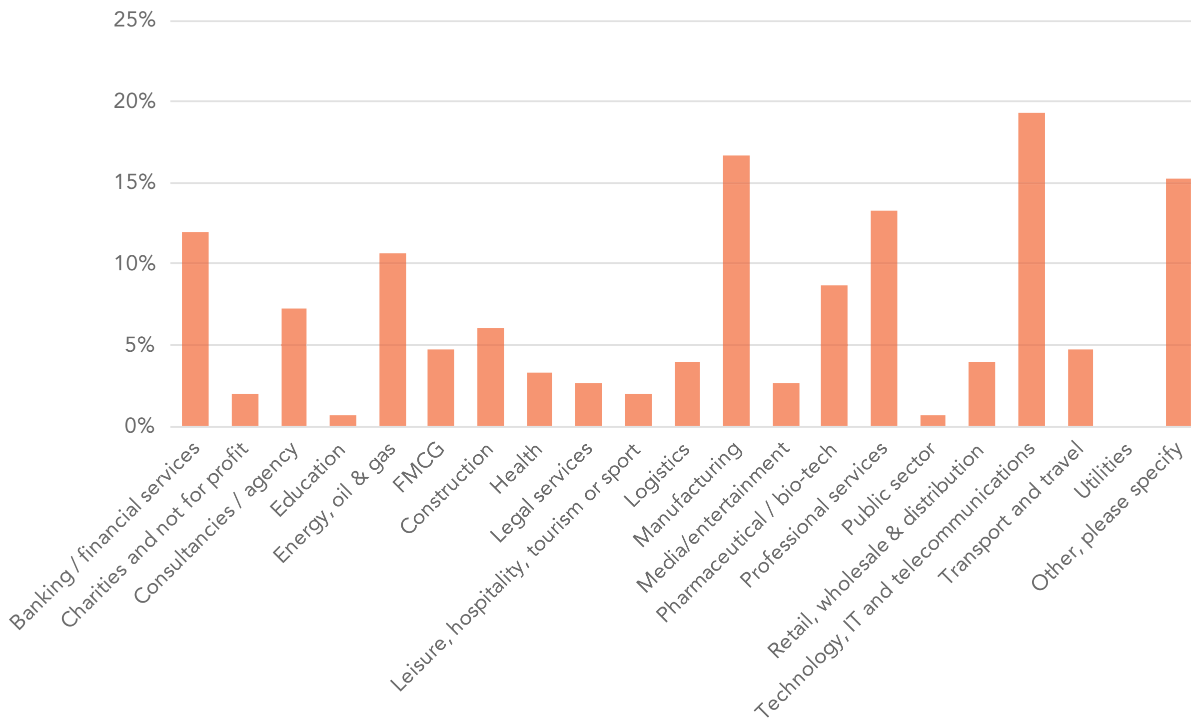
The expansion of consultancy posts over the past few years is of particular interest. In an increasingly lean world for cost and growth in global mobility teams, consultants are becoming an effective tool for addressing gaps in a program for a fixed period.

Global mobility professionals are discovering that, as role availability remains limited in certain sectors, consultancy is a viable way to train and acquire expertise.

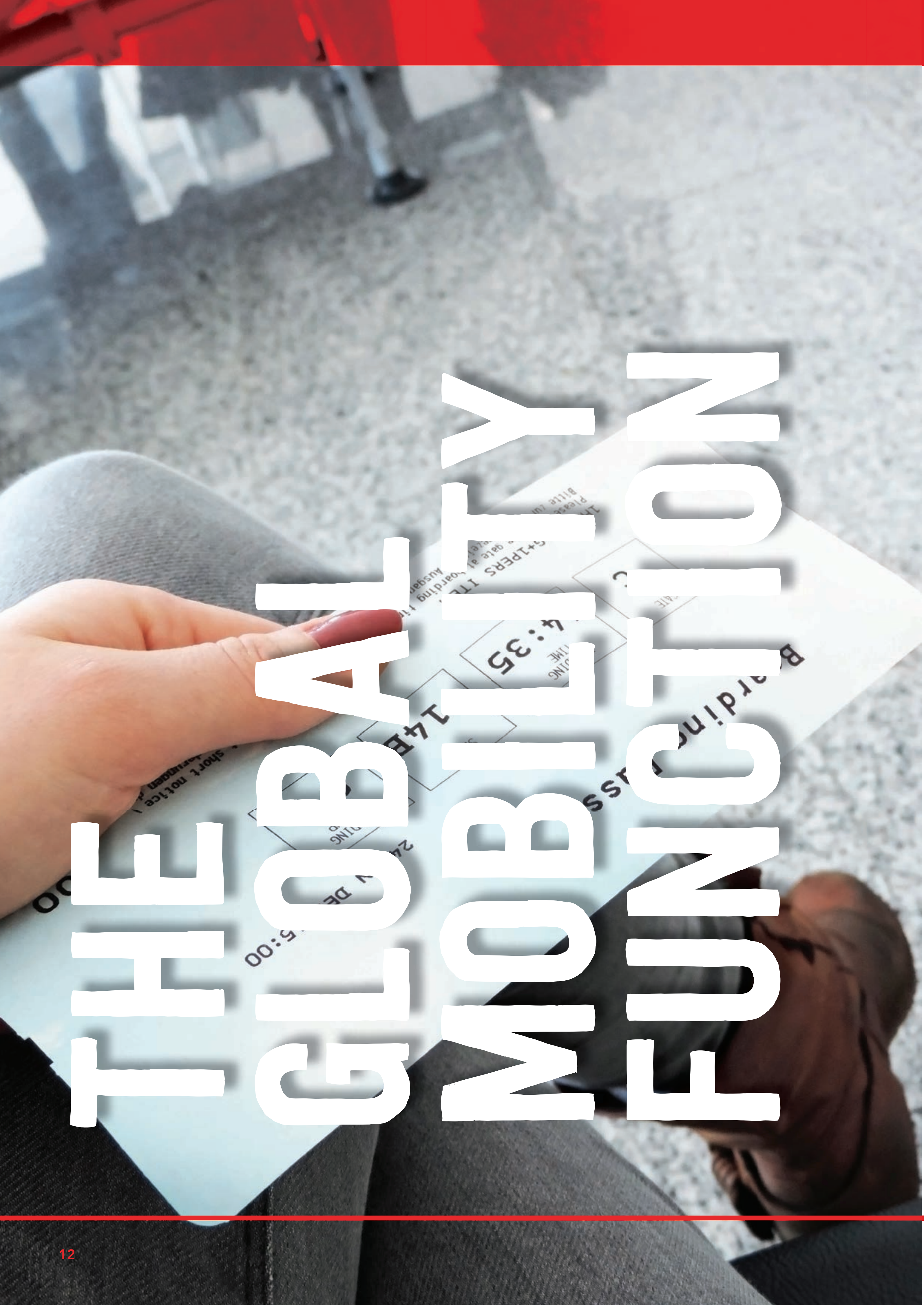
Where is your company headquartered?



In which sector(s) does your organization operate?



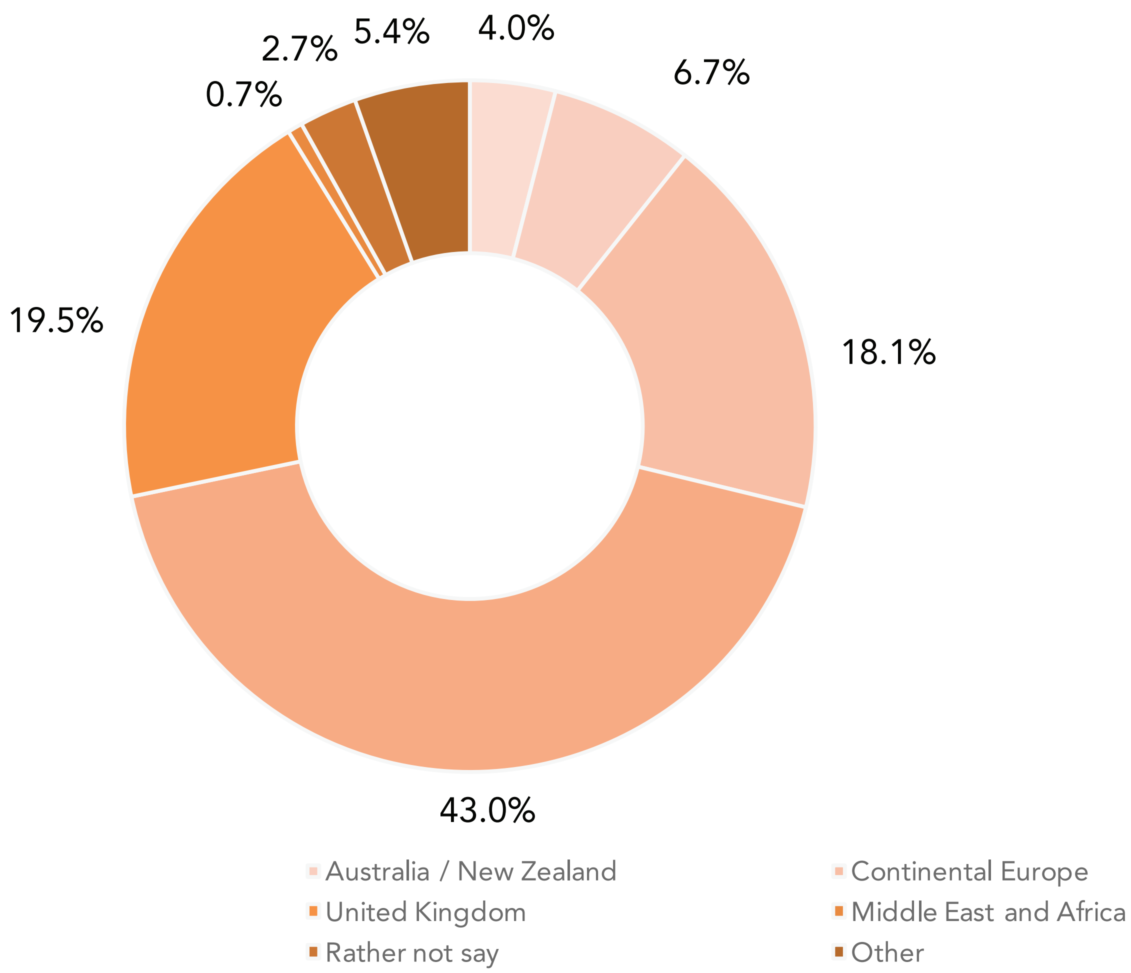
THE GLOBAL MOBILITY FUNCTION



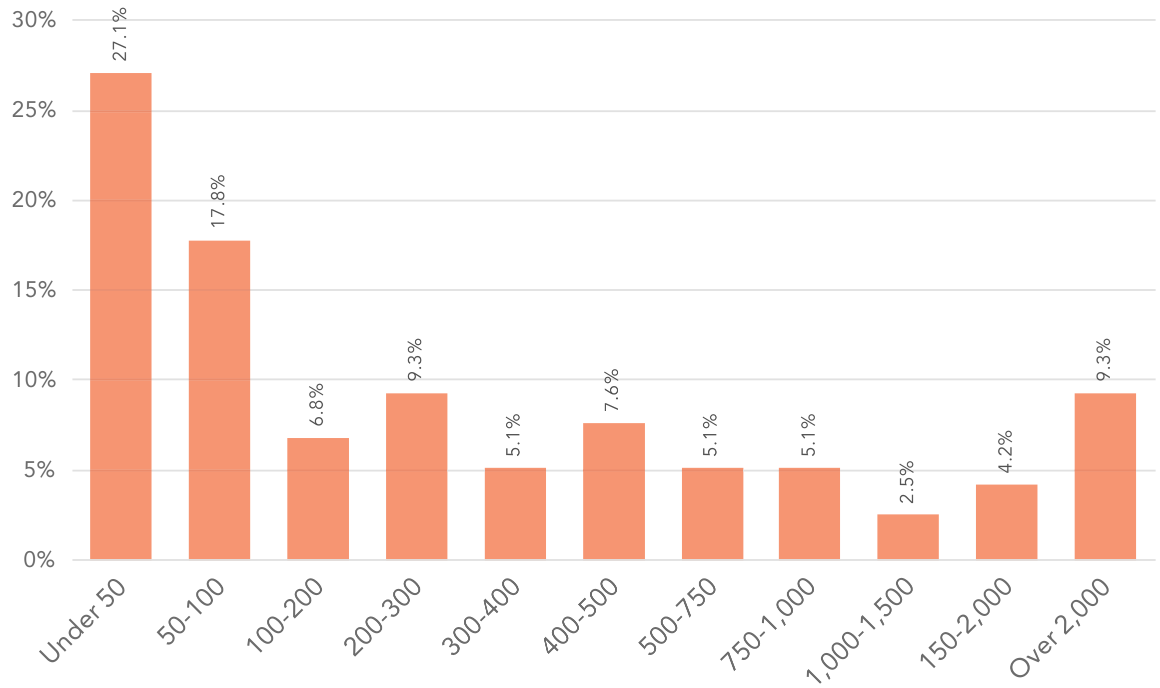
This section explores the global mobility function and gives a deeper insight into the structure of teams. We asked whether organizations were located centrally in one place or decentralized either on a regional hub basis or in multiple locations. We also asked respondents which department they reported to and which department they thought they should report to, and enquired further about job roles, headquarters and reporting line structures.

For ease of definition, organizations with up to 300 assignees are deemed to have small to medium-sized programs and those with more than 300 assignees are deemed to have medium-sized to large programs. The size of a program is therefore not determined by the size of the organization but by the number of assignees worldwide.

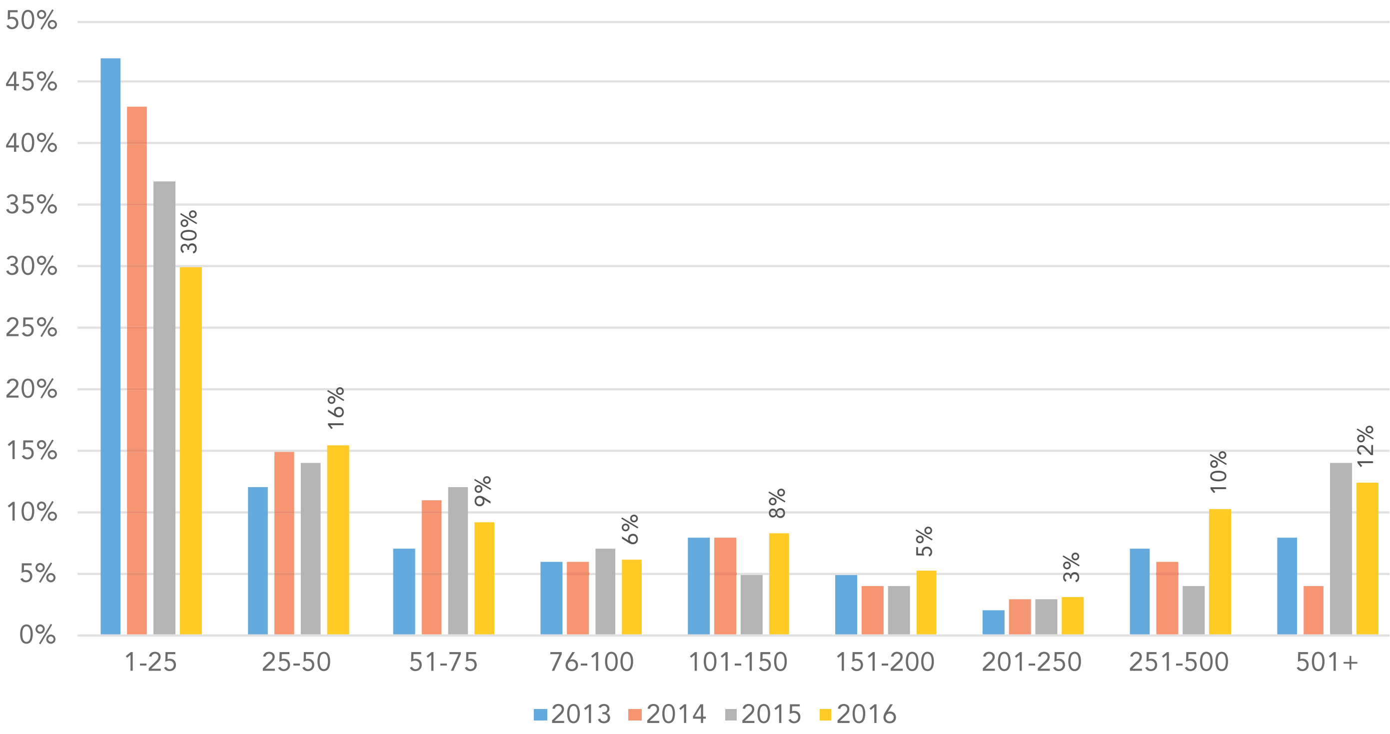
In which region does your global mobility team leader sit?



How many assignees does your organization have worldwide?



How many assignment initiations have there been since 2013?



Assignment initiations have increased across the board since 2013 with the exception of the smallest batches (1-25 initiations), which have fallen from nearly half (47%) of respondents in 2013 to just under a third (30%) in 2016. The biggest rise has been for 251-500 and 501+ initiations. This increase in larger batches may be the result of the discovery and tracking of commuters and short-term business travellers, both of which groups are governed by global mobility.

What percentage of your assignees fit the following types of assignment?

ASSIGNMENT TYPE	AVERAGE PERCENTAGE
Long-term assignment	44%
Short-term assignment	21.53%
Commuter assignment	12.71%
Short-term business travel	15.66%
Local transfer	25.39%
Foreign local hire	17.3%

Detailed analysis: To which department in your organization does the global mobility team report?
In examining trends in reporting lines, we compared responses both annually (2015 and 2016) and by program size.

In 2016 there has been a surprisingly sharp fall in the proportion of global mobility teams reporting to compensation & benefits. The pattern in previous years suggested a smaller dip but the decrease has been substantial – by 10%.

Reporting into talent management has increased by less than 1%, unlike the rate of 2-3% seen in previous years.

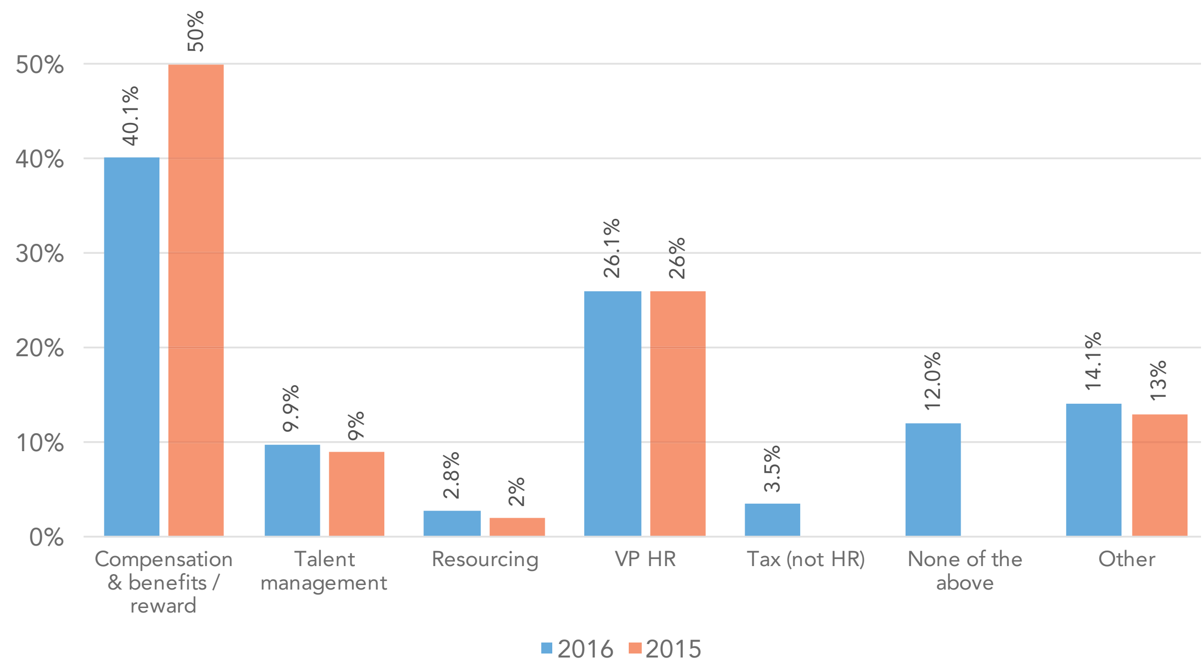
However, when the responses are compared by program size, an interesting difference emerges: both programs are most likely to report into compensation & benefits; however, large programs are growing in the number reporting into talent management.

The 'Other' category and 'None of the above' indicate an increase in the use of HR shared services and operations as the reporting line for global mobility teams.

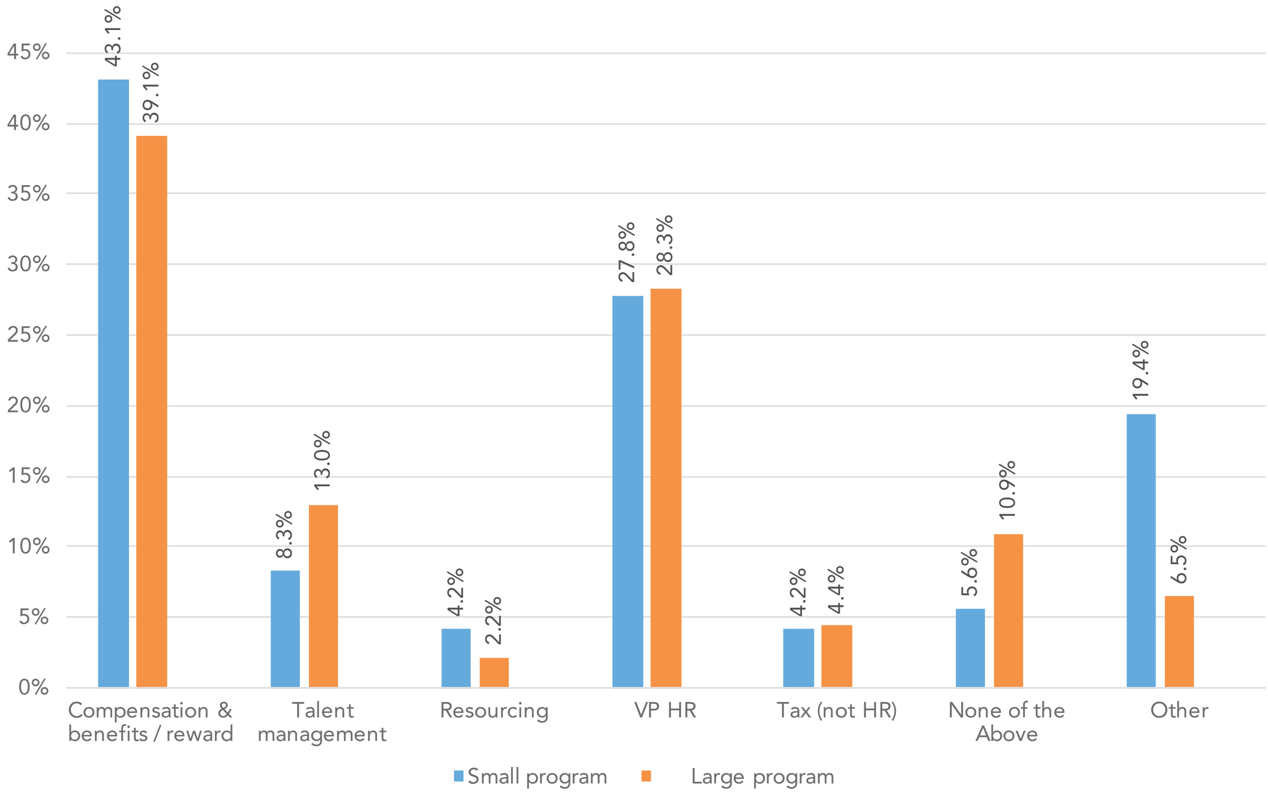
Also of note are two new reporting lines: retention and talent acquisition.

As larger firms seek to not only find but retain the best talent, global mobility is being increasingly relied upon. This involves both moving talented employees to the right location and offering them opportunities for career growth, while satisfying their desire for global experience.

Annual comparison: To which department in your organization does the global mobility team report?



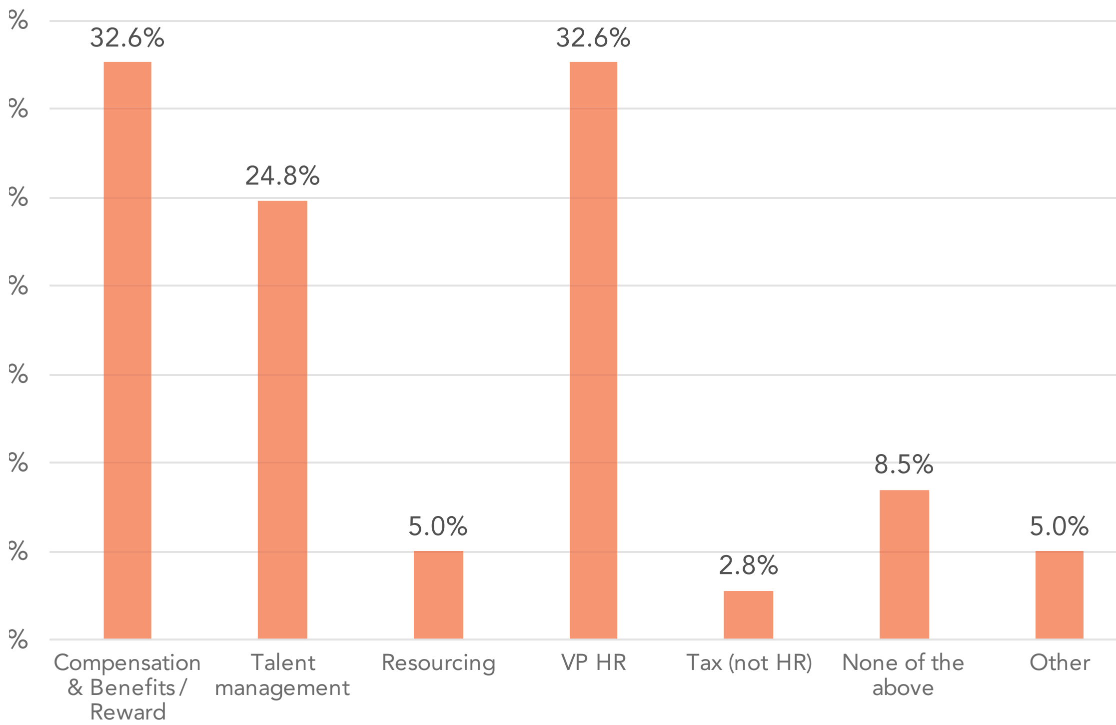
Comparison by program size: To which department in your organization does the global mobility team report?



Detailed analysis: To which department should the global mobility team report? Compensation & benefits has continued to decline as a preferred reporting line while talent management, HR and resourcing have increased.

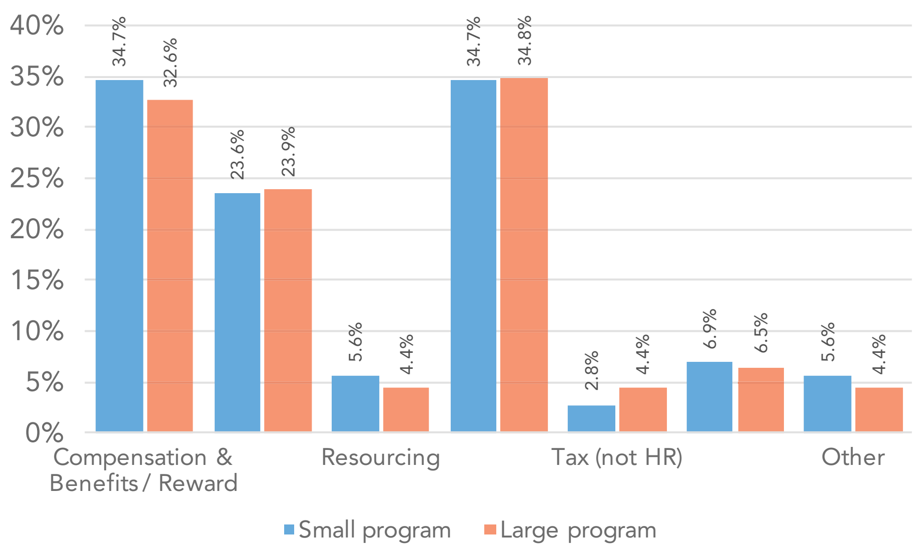
However, despite the shift away from compensation & benefits, it remains the preferred reporting line, along with HR.

To which department in your organization do you think the global mobility team should report?



By program size, to which department in your organization do you think the global mobility team should report?

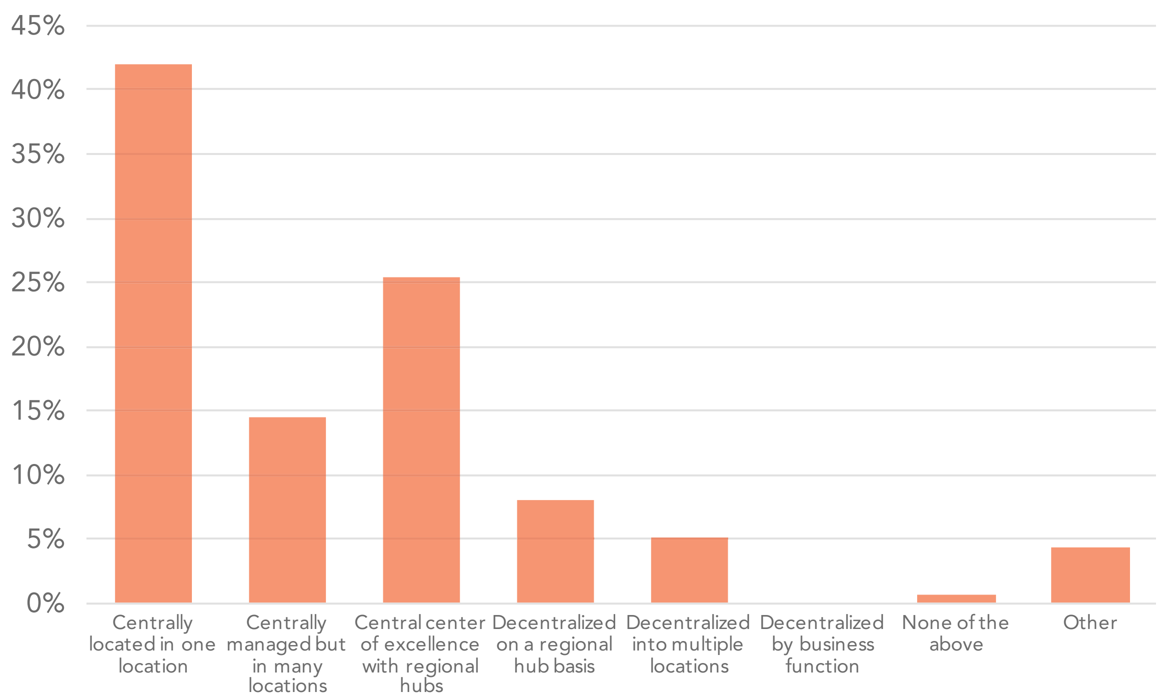
The data reveals a minimal difference between small and large programs in terms of global mobility professionals' preferred reporting lines. This demonstrates a growing alignment irrespective of assignee numbers and highlights the trend of increasing standardisation despite the differential splits in preferred reporting lines.



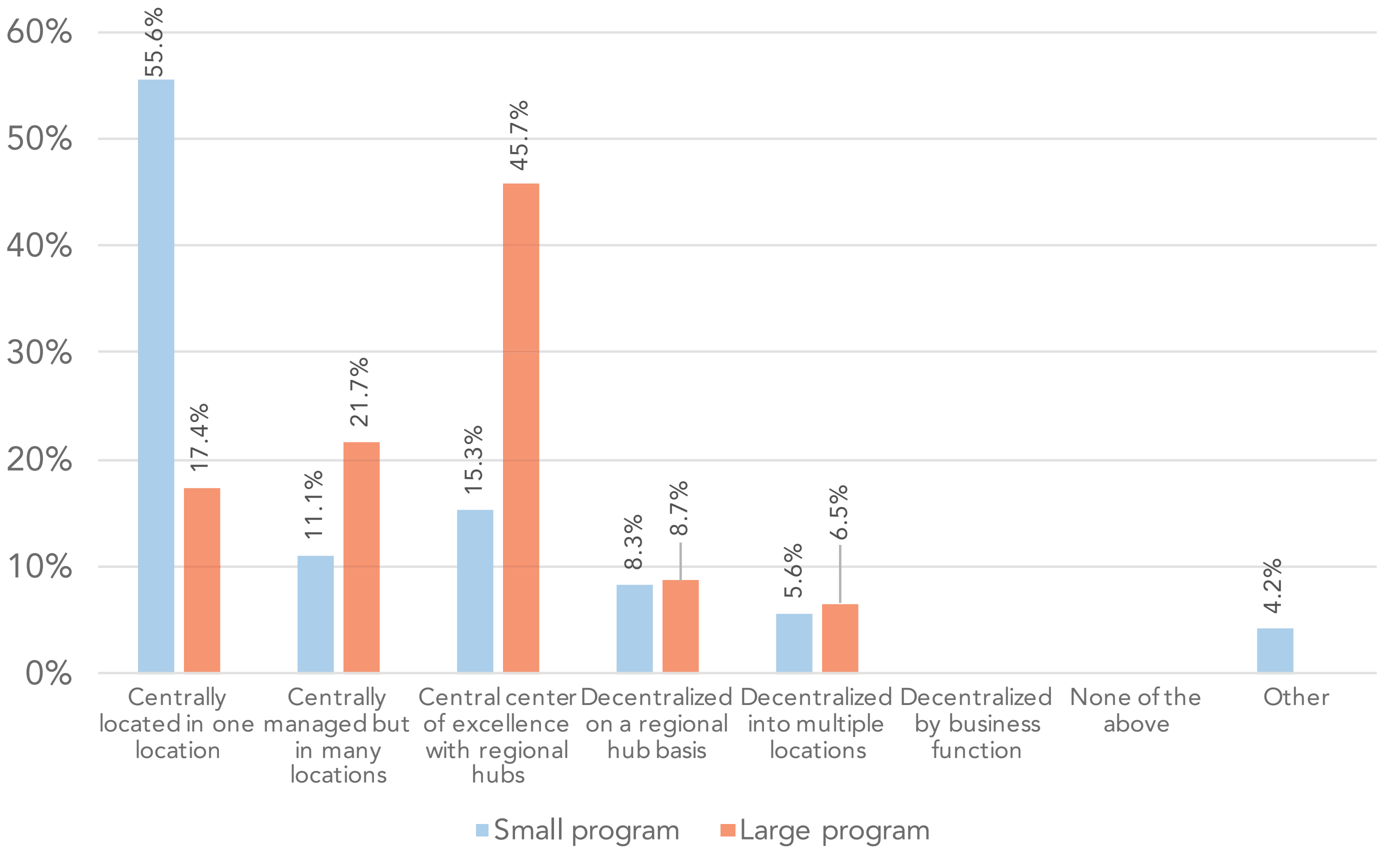
Detailed analysis: Comparison of the structure of in-house teams

The changes over the past year reflect an overall decrease in decentralization and a growth in centralization based on a single location (the latter climbing from 39% in 2015 to 42% in 2016). 'Centrally managed but in many locations' fell the most from 2015, by 4.5%. Interestingly, the proportion of teams structured in this way is the same as it was in 2014, at 14%. During the past year, 'decentralized by business function' has fallen from 2% to 0% and 'decentralized into multiple locations' has fallen from 6% to 5%. However, 'decentralized on a regional hub basis' has increased slightly from 7% in 2015 to 8% in 2016.Notably, when segmented by program size there is a substantial difference in the way teams are structured.

Which of the following statements best describes the structure of your in-house global mobility team?



By program size, which of the following statements best describes the structure of your in-house global mobility team?



Over half of small programs are centrally located in one location, compared to just 17.4% of large programs. However, the most popular structure for large programs – at 45.7% – is a center of excellence with regional hubs.

There are reasons for this key difference. When comparing the number of staff employed in global mobility teams for small and large programs, we found the average number for a small program was five employees while the average for large programs was 22 employees.

If we consider the traditional caseload for a global mobility professional based on program size, on average, small to medium programs have a median caseload of 25 assignees per head of staff while medium to large programs have a median caseload of 100 per head.

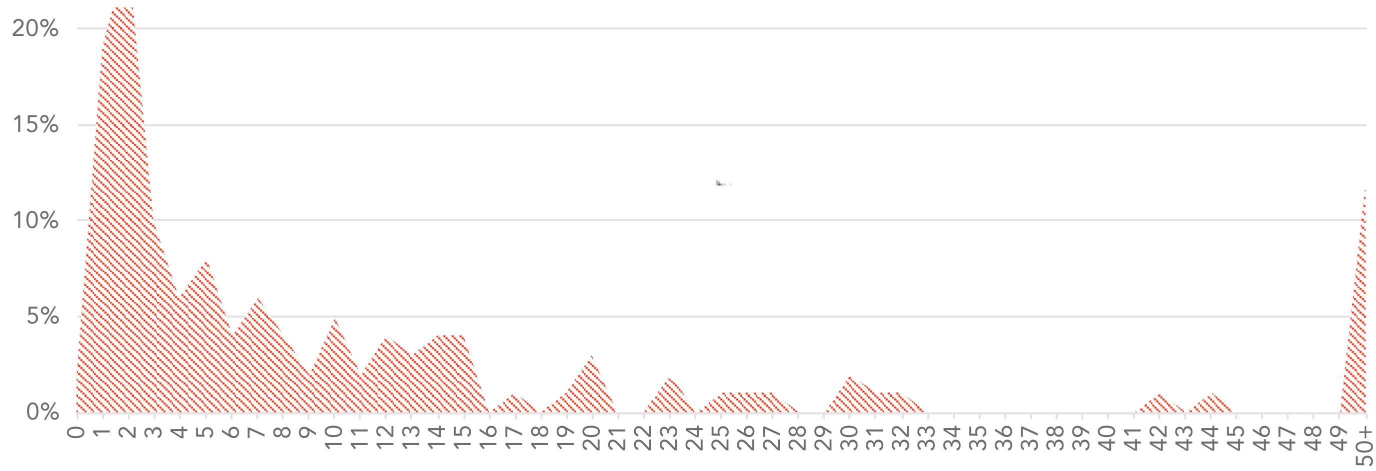
This creates an argument for splitting the management of assignees across separate locations.

A topic often raised and debated by global mobility professionals is the need to be 'on the ground' with assignees. An understanding of regional differences and the complexities of jurisdictions is critical to doing a good job.

Therefore, regional centers of excellence give global mobility directors, often based at headquarters, the assurance that their assignees in various locations are being managed and supported on the ground by someone who is familiar with local customs, requirements and challenges, and who is able to respond in a timely manner.

Program size	Average number of staff	Max team size
Small program	4.8	26
Large program	22.3	50

How many people work full-time in your global mobility team worldwide?

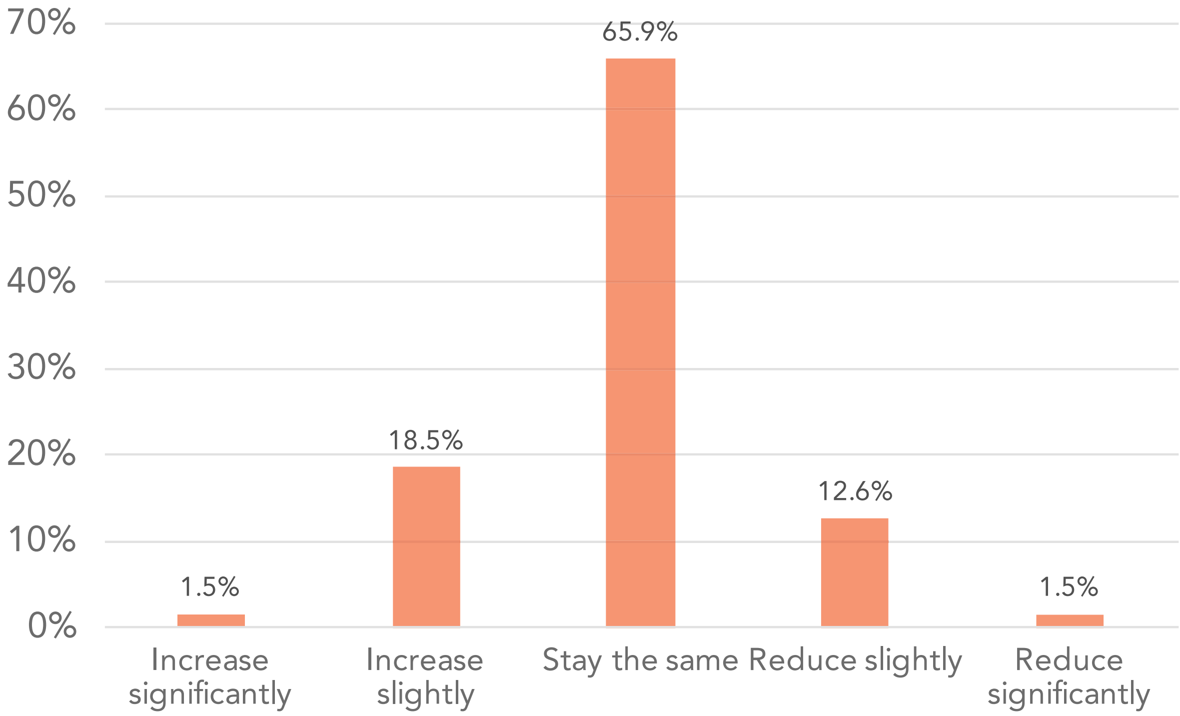


Detailed analysis: Resourcing a global mobility team
The resourcing of global mobility teams has historically been a debate between industries. During boom times, industry teams often grow. However, as the global economy shifts, so too does the number of staff working full-time in global mobility. As a result, and as seen in earlier findings, there has been an increase in the number of professionals able to work across global mobility and other functions: often tax, compensation & benefits, talent management and HR.

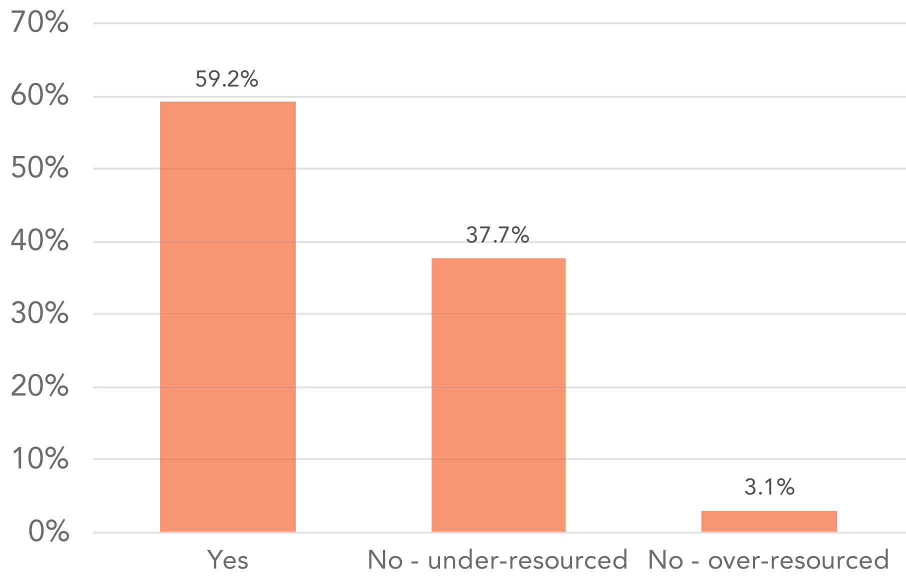
Overall, and across industries, the majority of respondents said not only that their teams would stay the same size over the next year but also that they were resourced correctly.

The drafting and training of cross-functional people has brought the biggest change to global mobility teams, allowing them to scale where needed without increasing their bottom line.

Over the next 12 months, do you expect the number of people in your global mobility team to increase, reduce or stay the same?



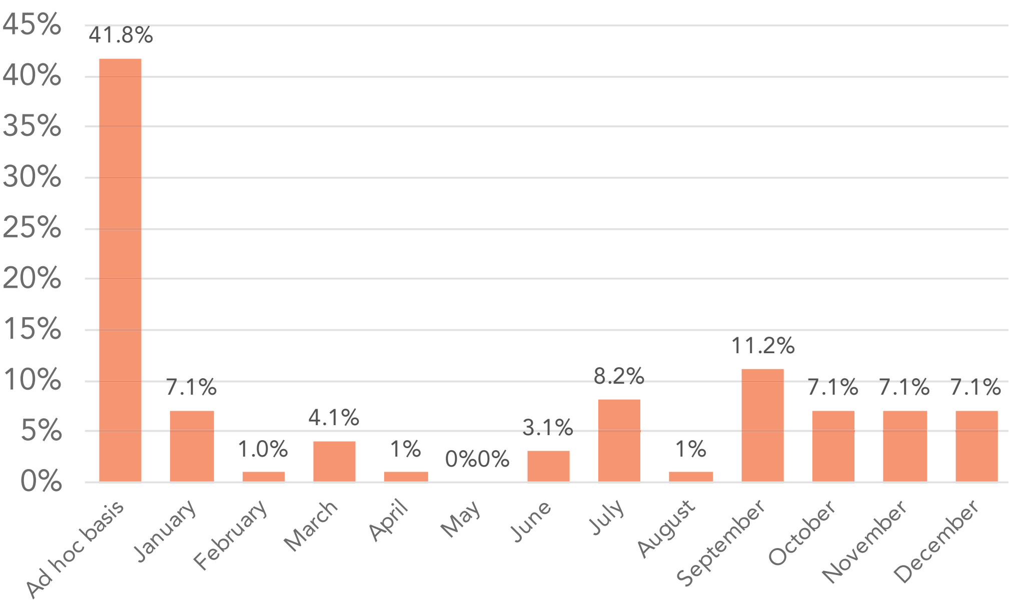
Do you feel your global mobility function is resourced correctly?



Detailed analysis: Training and budgets for internal teams

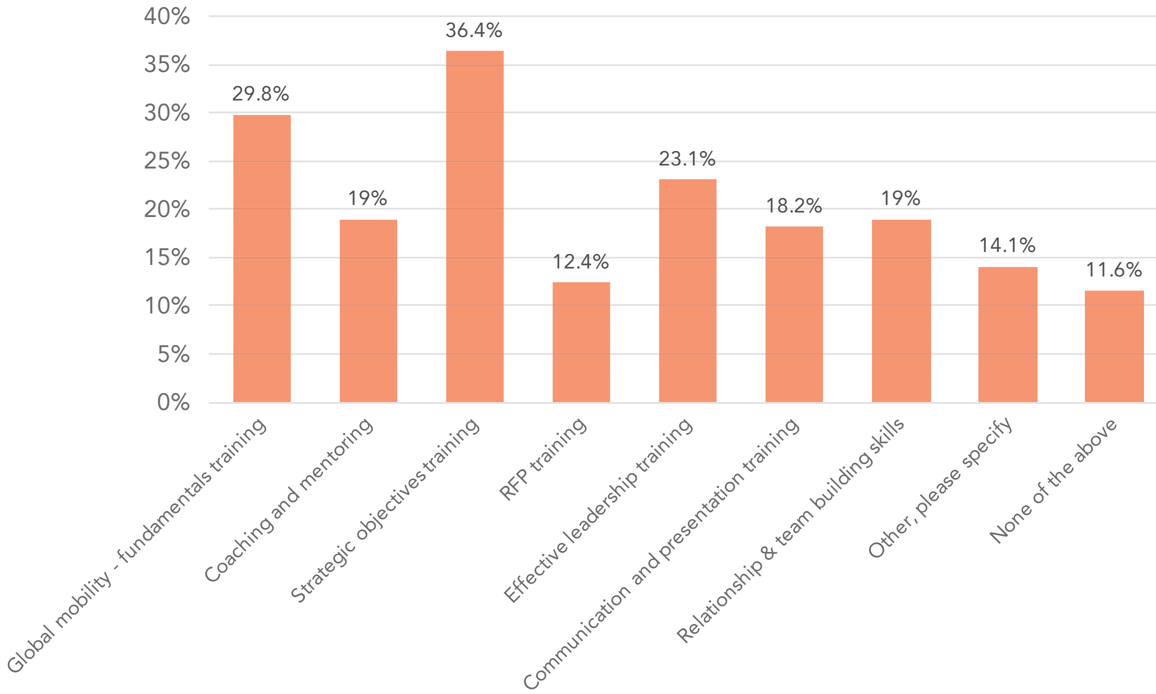
On average, a large program spends £18,636 a year on internal training of global mobility staff and a small program spends £11,532. The preferred timing for planning of training budgets remains an ad hoc basis (41.8%) and the variation between months is generally low. September is slightly preferred (11.2%), followed by July (8.2%) and then October, November, December and January jointly (7.1%). This may be due to training being given with the acquisition of new staff rather than as department-wide training. However, the trend from October to January is interesting. The fall between January and February is quite large at 6.1% and training budgets are rarely set in late winter/early spring. There is a minimal spike in March (4.1%), potentially due to the approaching end of the tax year.

When do you plan your annual training budget?

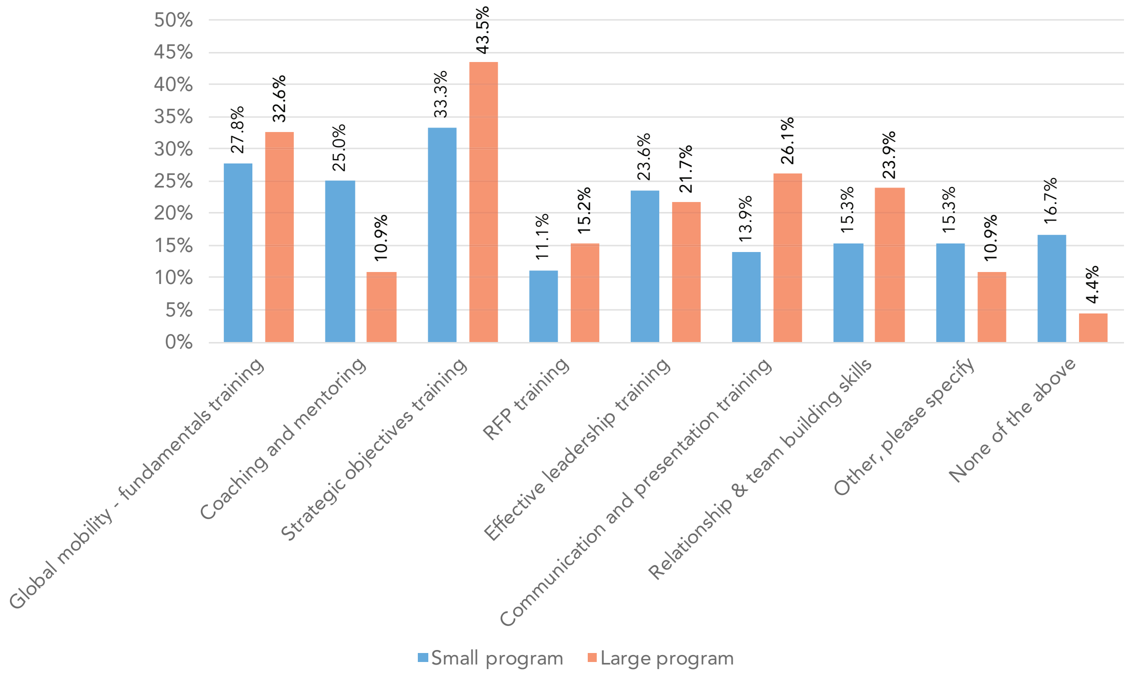


As global mobility teams continue to evolve into strategic partners, it is increasingly important to understand the aims and objectives of one's business. This is reflected in data showing that 'strategic objectives training' is deemed the most important for global mobility professionals to acquire this year. The desire for 'global mobility fundamentals training' is surprisingly high at 29.8% of respondents, making it the second most popular choice. Earlier findings had suggested that fundamentals would fall as teams remained the same size and felt correctly staffed. So is there a disconnect within teams or is this due to continual cross-training across business functions? We suggest the latter.

Which two skillsets do you most want to improve in 2016–17?



By program size, which two skillsets do you most want to improve in 2016–17?



When comparing the responses for small and large programs, the difference for 'strategic objectives training' was pronounced, with nearly half of large programs deeming it their top skill for training in 2016–17 versus one-third of small programs. While both were broadly in agreement on the top two skillsets overall, their percentages varied significantly.

Training in 'coaching and mentoring' revealed the largest discrepancy, with a quarter of small programs selecting it as an area of development versus 10.9% of large programs.

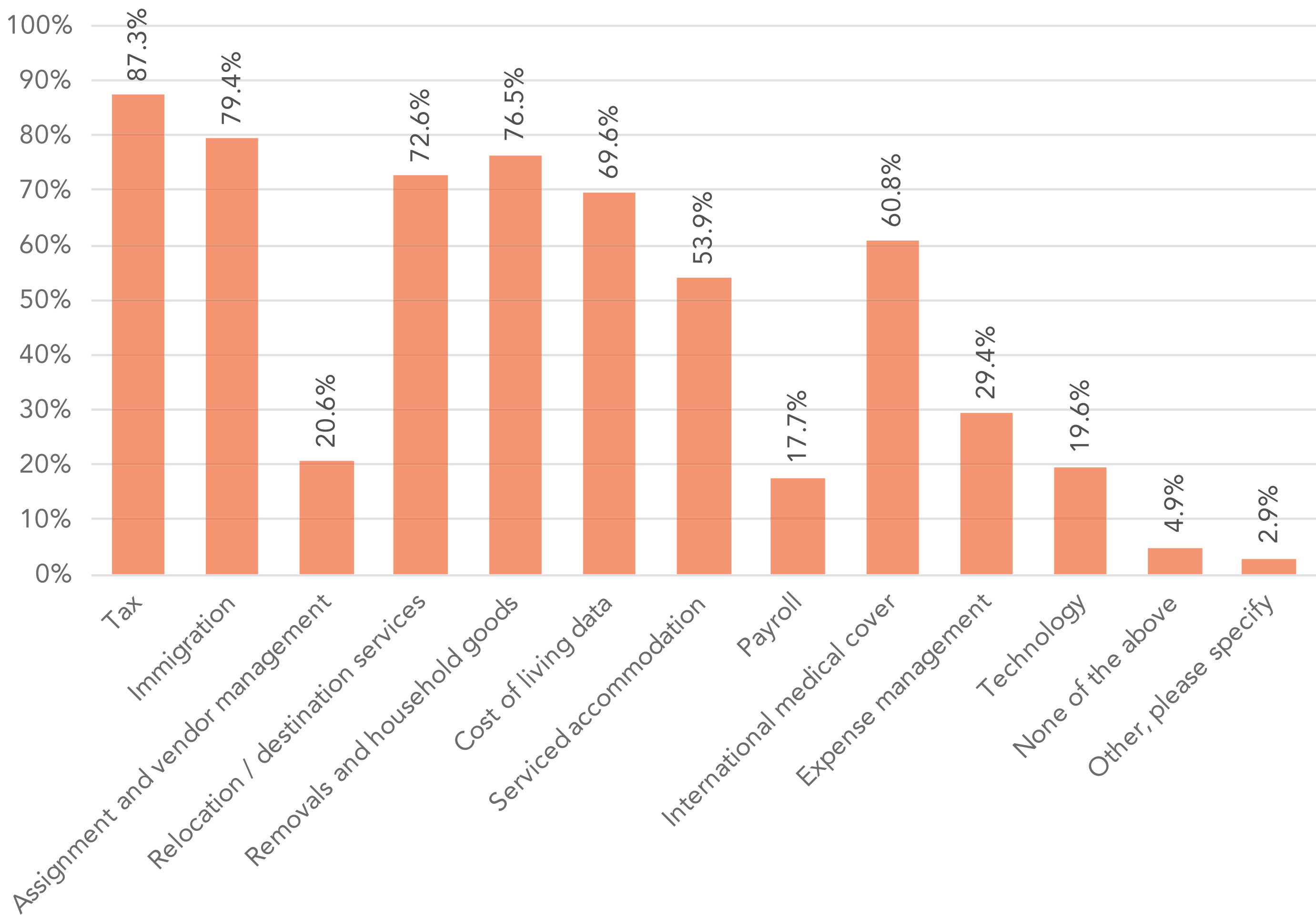
Large programs also demonstrated a desire for training in communication and presentation, and relationship and teambuilding skills. This is probably due to the increase in cross-functional teams and the larger remit of working with different business lines.

OUTSOURCED SERVICES

Organizations are increasingly finding that outsourcing can offer a more cost-effective global mobility solution than keeping everything in-house. It also enables in-house professionals to focus more on the strategic delivery and management of the function over the administration.

This section reviews the various services outsourced by organizations, including tax, immigration, assignment and vendor management, relocation/destination services, removals and household goods, serviced accommodation, payroll, expense management and technology.

Which of the following services are predominantly outsourced to a specialist third party? Please select all that apply



For outsourcing overall, there were only two areas where moderate change could be found:

- Relocation and destination services fell from 81% in 2015 to 72.6% in 2016

- International and medical cover fell from 71% in 2015 to 60.8% in 2016

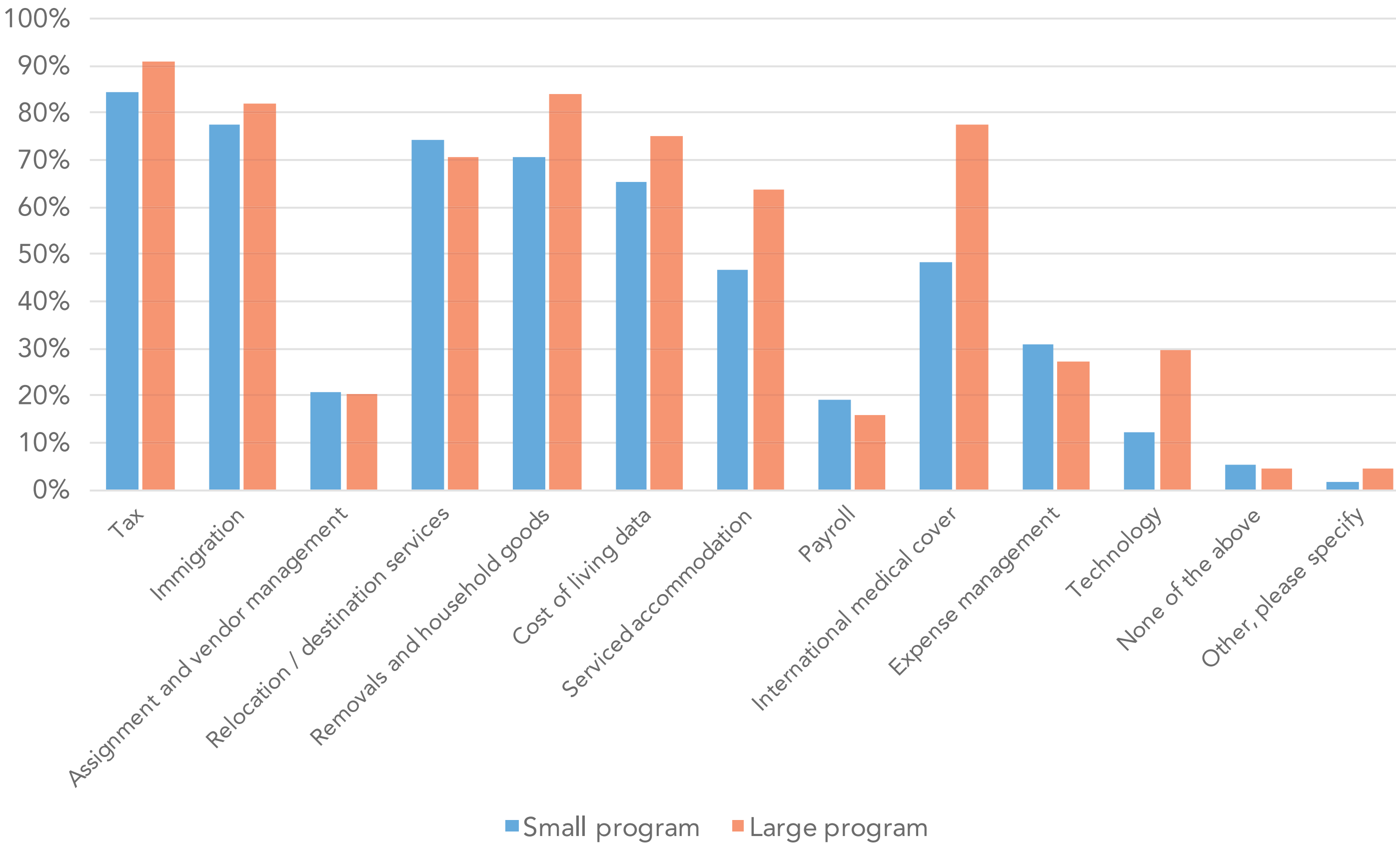
When comparing the other services, there were slight increases or reductions but no substantial changes (defined as more than 5% variation).

In examining the trends set in 2014 and 2015, we found that expense management has continued to grow (from 20% in 2014 to 28% in 2015 and 29.4% in 2016), as has technology (compare 15% in 2015 to 19.6% in 2016). Also showing continued growth were tax (up 1.3% from 2015), assignment and vendor management (up 2.6% from 2015), serviced accommodation (up 0.9% from 2015) and payroll (up 0.7% from 2015).

Payroll and serviced accommodation appeared to have levelled out. Payroll's growth from 12% in 2014 to 17% in 2015 but only 17.7% in 2016 indicates a 'sweet spot' in its outsourcing. Between 2014 and 2015, serviced accommodation fell from 59.1% to 53%, but growth of 0.9% in 2016 suggests a period of stabilisation.

Immigration has shown a decline in outsourcing (down by 1.6% from 2015), as has removals and household goods (down by 1.5%) and cost-of-living data (down by 0.4%).

By program size, which of the following services are predominantly outsourced to a specialist third party?



When comparing small and large programs in 2016, the data indicated that large programs were much more likely to outsource.

Small to medium-sized programs outsourced more than large programs only in the following areas:

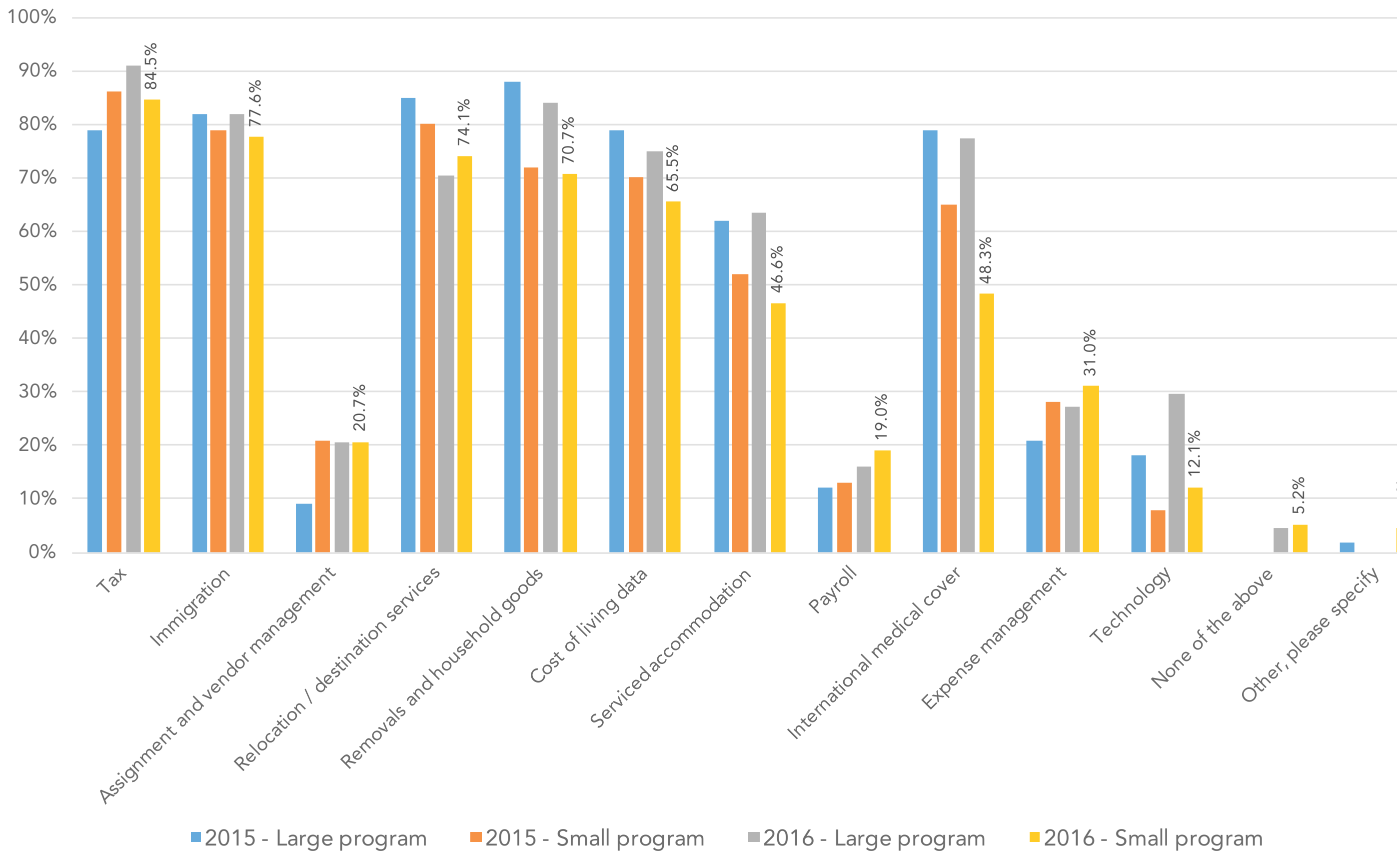
- Assignment and vendor management
- Relocation and destination services
- Payroll
- Expense management

Outsourcing emerged as a more popular solution for large programs.

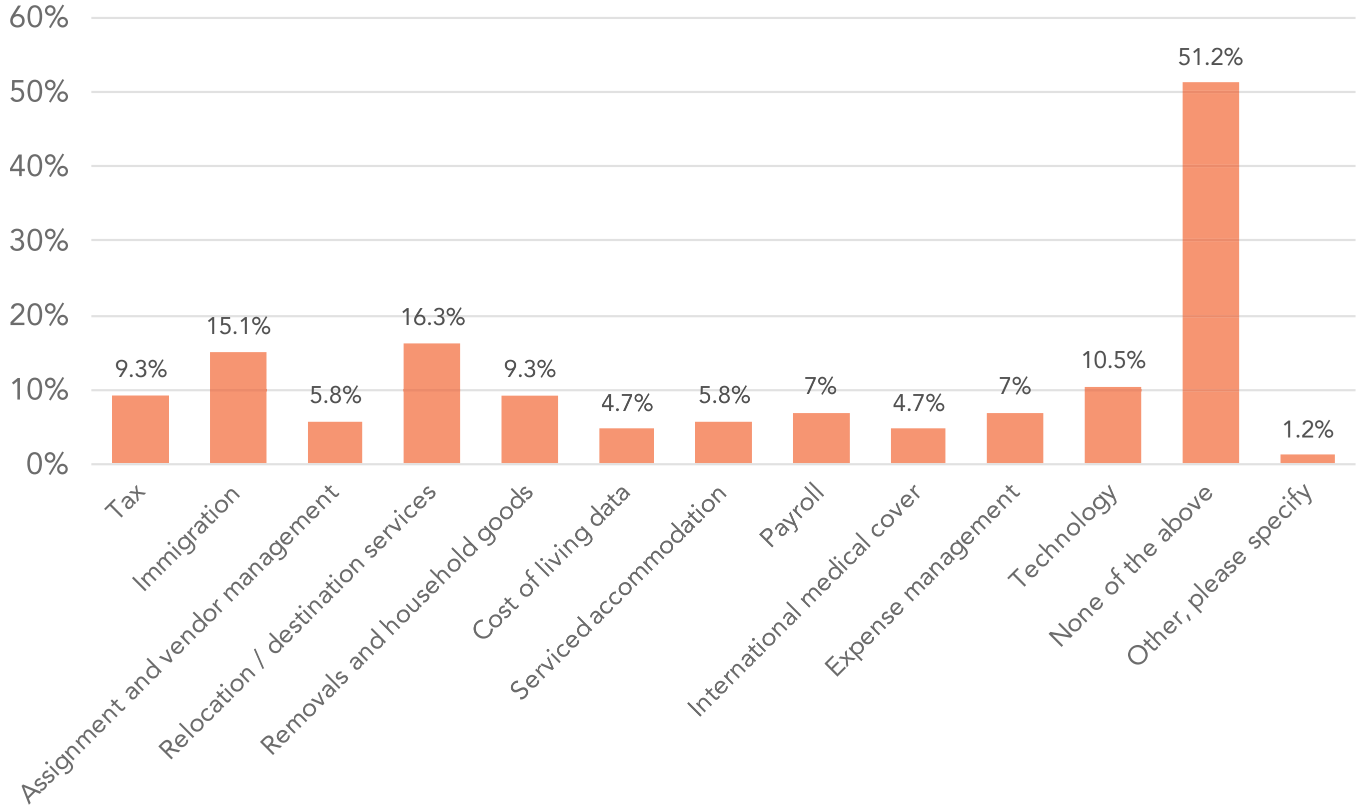
Outsourcing of tax grew substantially for large programs, increasing from 79% in 2015 to 90.9% in 2016. Other areas of significant growth for large programs included assignment and vendor management, which rose from 9% in 2015 to 20.5% in 2016, and technology, rising from 18% to 29.6%.

Interestingly, while tax grew in importance for outsourcing by large programs, it fell for small programs (from 86% in 2015 to 84.5% in 2016). In fact, the only areas of growth for outsourcing by small programs were in payroll, expense management and technology. International medical cover experienced the largest outsourcing decline for small programs, going from 65% in 2015 to 48.3% in 2016.

Annual rate of change (2015 and 2016) between programs in services predominantly outsourced to a specialist third party



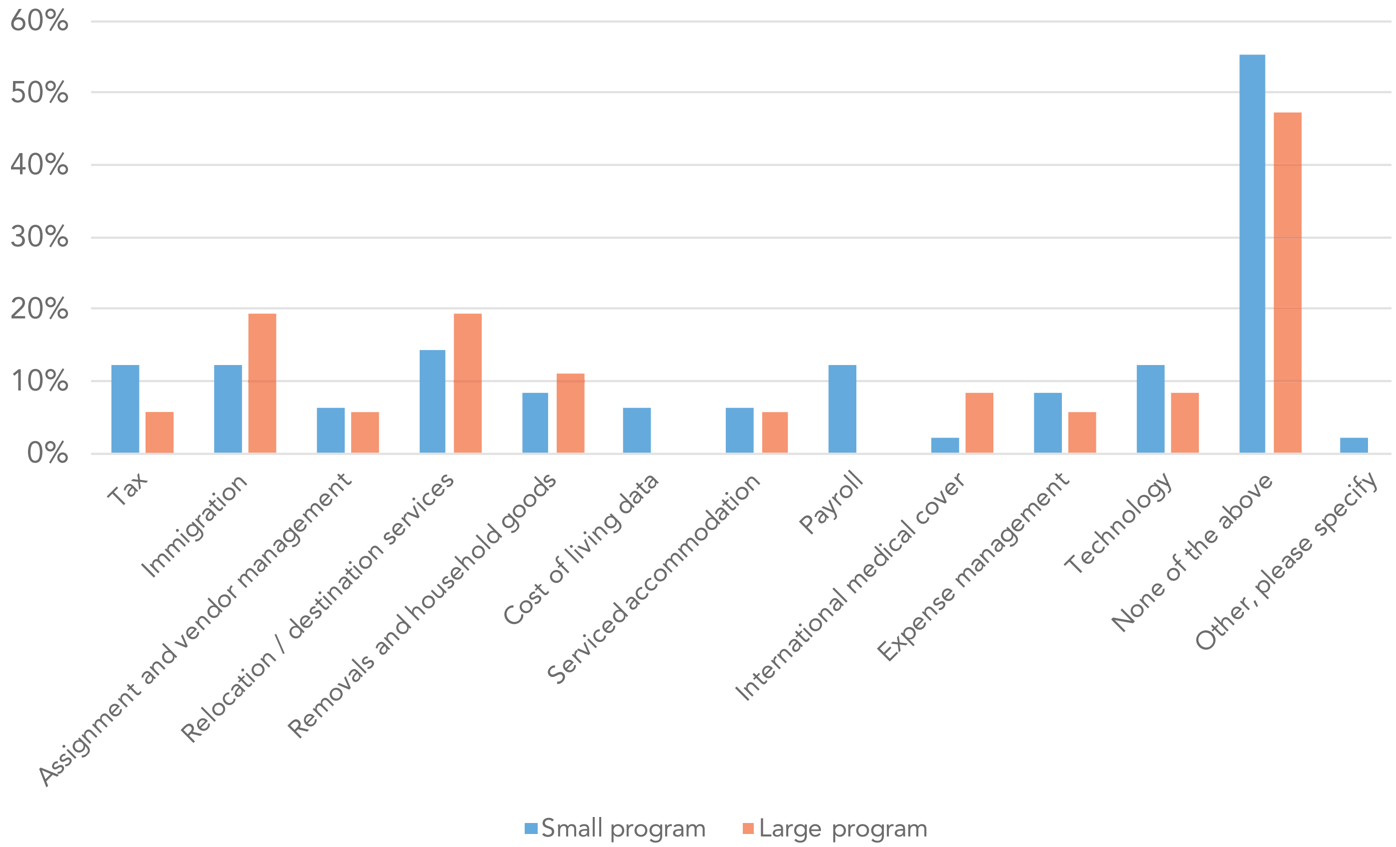
Are you planning to change any of the following providers in the next 12 months?



More than half of all global mobility programs do not anticipate changing any providers over the next year. Only three service lines are expected to change at a variance of 10% or more in the next year:

- Relocation and destination services at 16.3%
- Immigration at 15.1%
- Technology at 10.5%.

By program size, are you planning to change any of the following providers in the next 12 months?



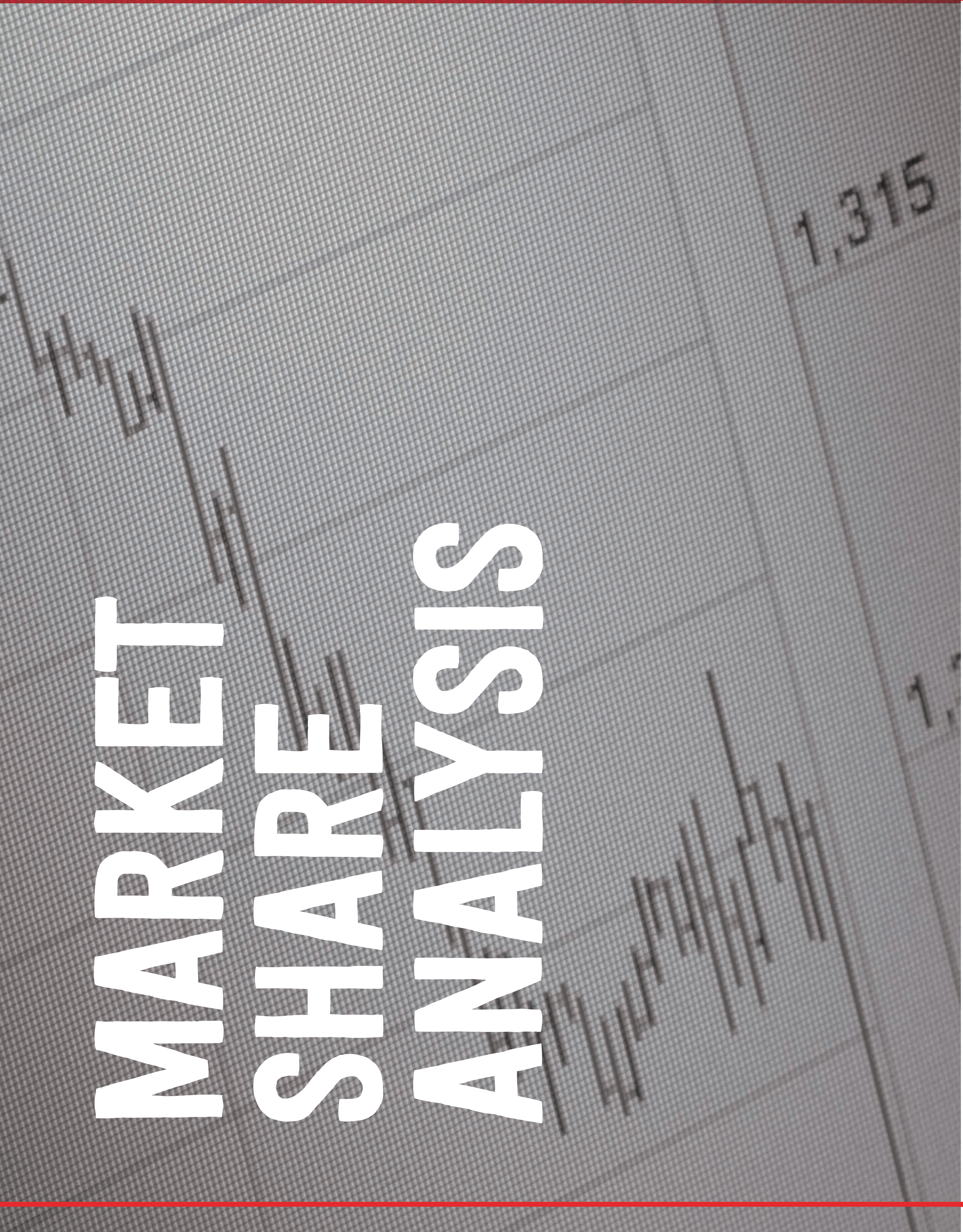
Small programs are marginally less likely to change their providers in the next year, which may correspond to their falling rate of outsourcing.

Large programs showed a variance over the average for changing their immigration and relocation and destination service providers in the next year, with nearly a quarter indicating they will seek to switch providers.

As payroll continued to grow, no large programs indicated they would change provider in the next year. Similarly, no large programs expected to switch cost-of-living data provider. By comparison, 12.2% of small programs indicated an intention to switch payroll provider and 6.1% expected to change their cost-of-living data provider.

Small and large programs showed similar expectations of changes to their relocation and destination service providers, at 14.3% and 19.4% respectively.

MARKET SHARE ANALYSIS

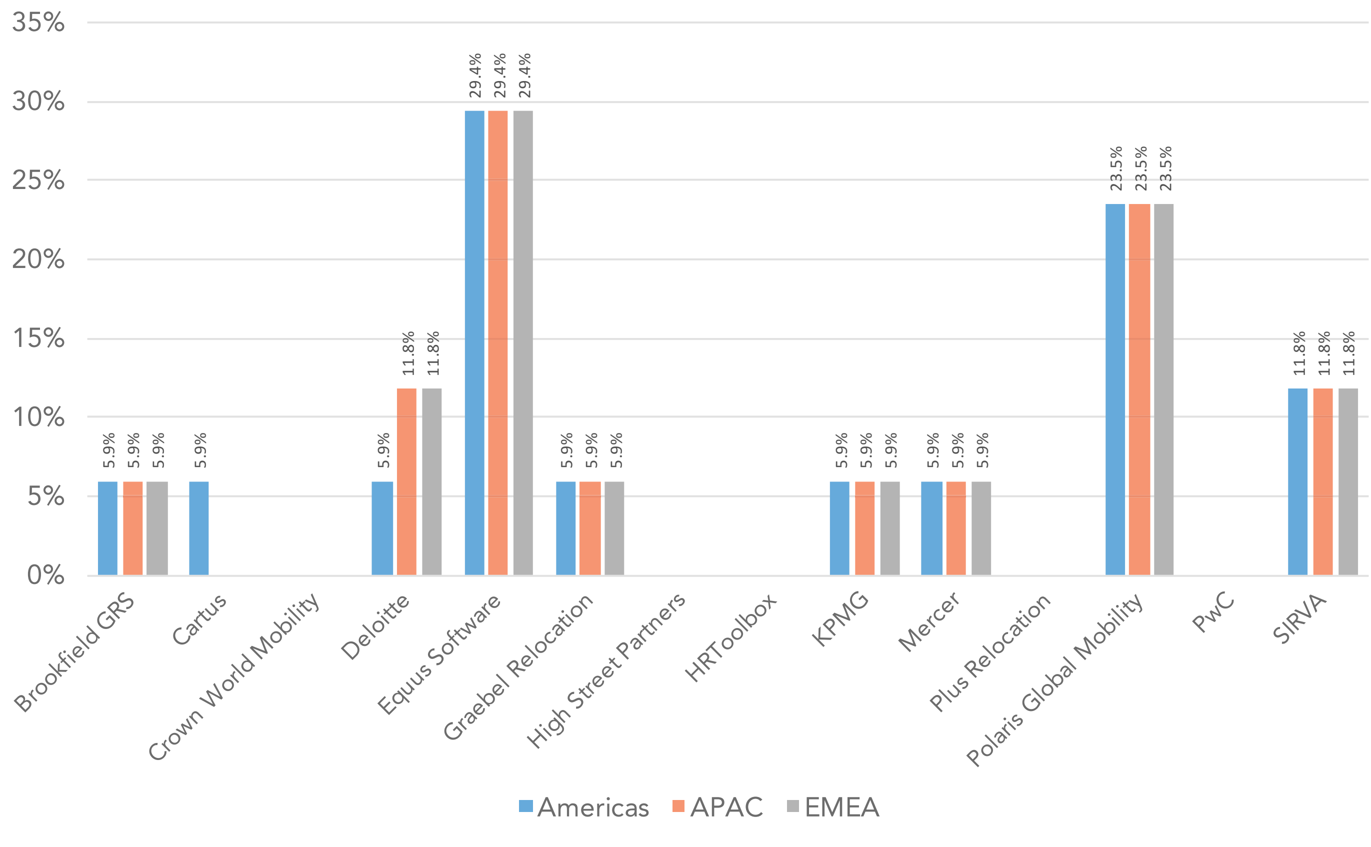


This section looks at the market share of the major service providers in the global mobility market. The different outsourced services include technology, tax, immigration, assignment and vendor management, relocation/destination services, removal/household goods, cost-of-living data, serviced accommodation, payroll, international medical cover and expense management.

NB: For the first time, we examined market share based on regional variation.

Our market share analysis is based solely on responses received rather than assignee volumes. It is important to be aware that results reflect only the information provided and are within statistical margins of error. Market share is shown as a percentage of respondents that outsource a particular service.

Who is your technology provider?

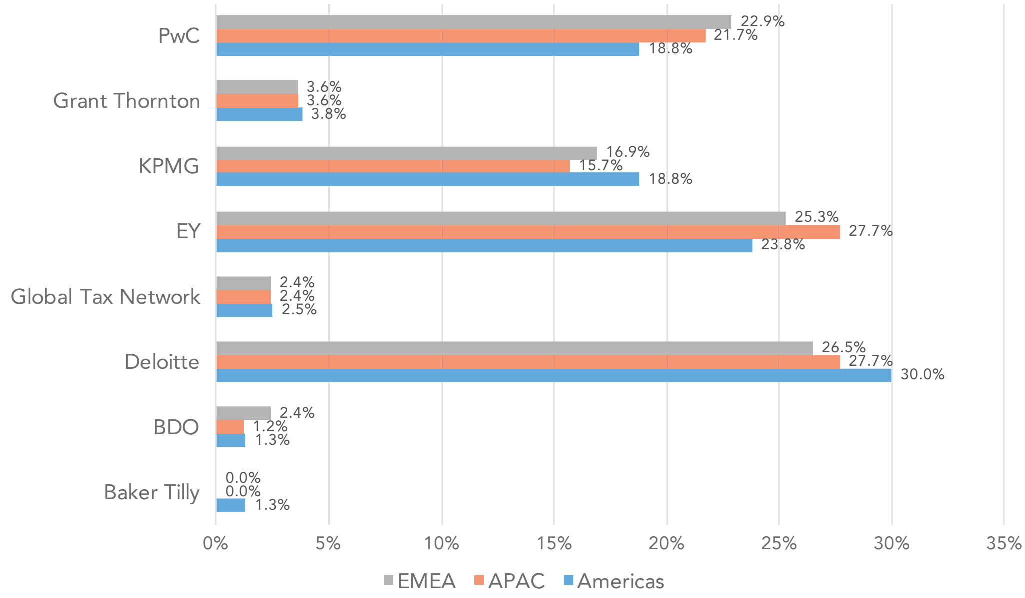


Technology is the only market share that was universal across regions.

Equus Software captured the largest segment of the market at 29.4% of respondents. Polaris Global Mobility also featured strongly with a 23.5% share of the market.

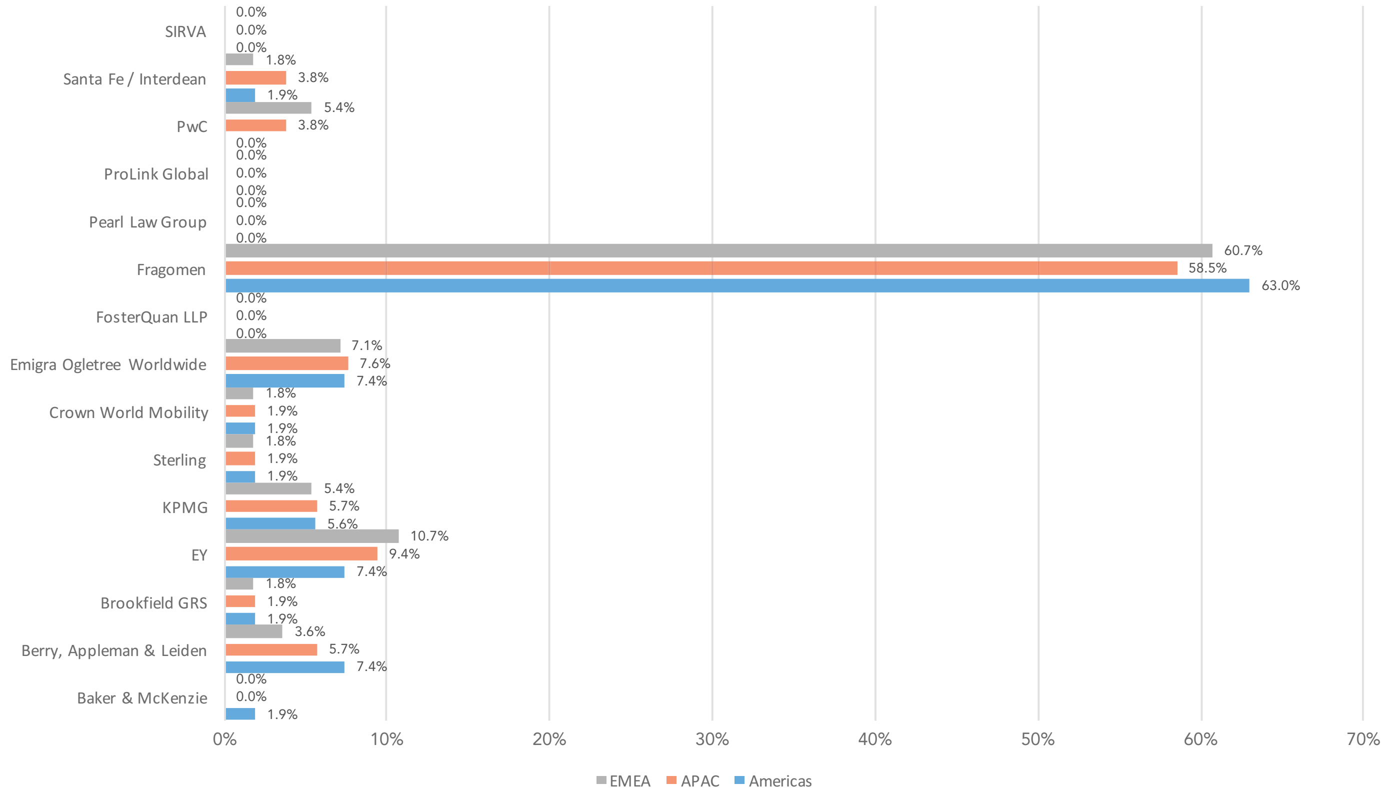
Other firms used were Move Guides and Sterling Relocation across all three regions and NuCompass in the Americas.

Who is your tax provider?



The Big Four continue to dominate the tax services landscape. Deloitte has grown its market share further, overtaking PwC and EY in both the Americas and EMEA, while sharing an equal portion of APAC with EY. Deloitte's growth in the Americas seems to be at the expense of EY. Other firms used included Altair, Hillbrook, John Allis, Pioneer and WTS.

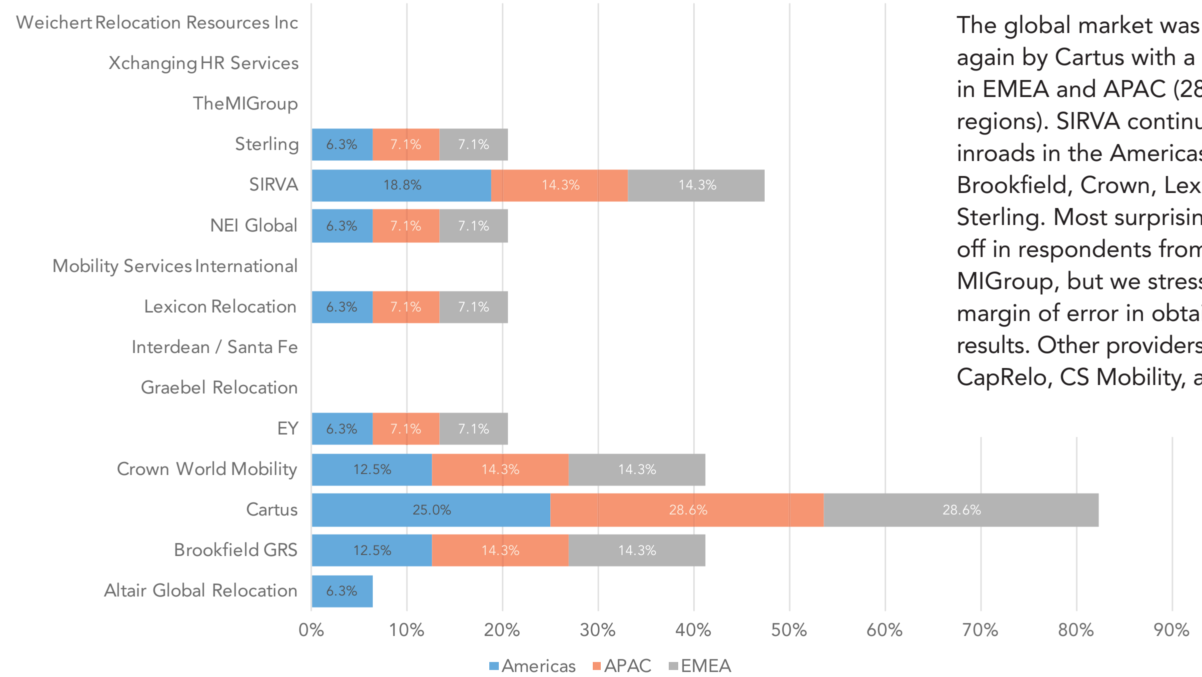
Who is your immigration provider?



Fragomen not only retained the highest market share but grew substantially in its capture of the available market. It captured 63% of the market in the Americas, 60.7% in EMEA and 58.5% in APAC. However, immigration continues to be a market where multiple vendors are used and small firms keep emerging. EY & Emigra also captured more of the market and showed healthy growth.

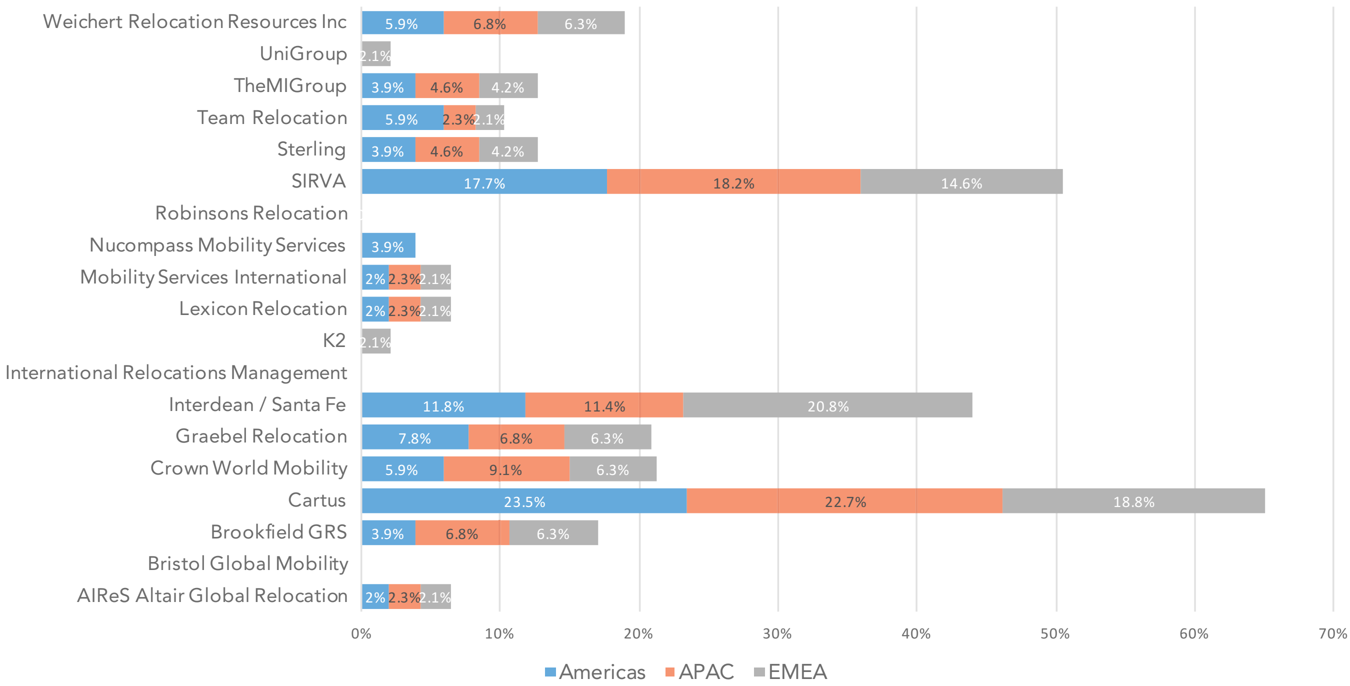
Other firms used included: Cornerstone, Duane Morris, Ferguson Snell, Greenburg Traurig, Hodgkinson Law Group, Kingsley Napley, Morgan Lewis, Newland Chase, Parker Poe, SSBB and Team Relocation.

Who is your assignment/vendor manager?



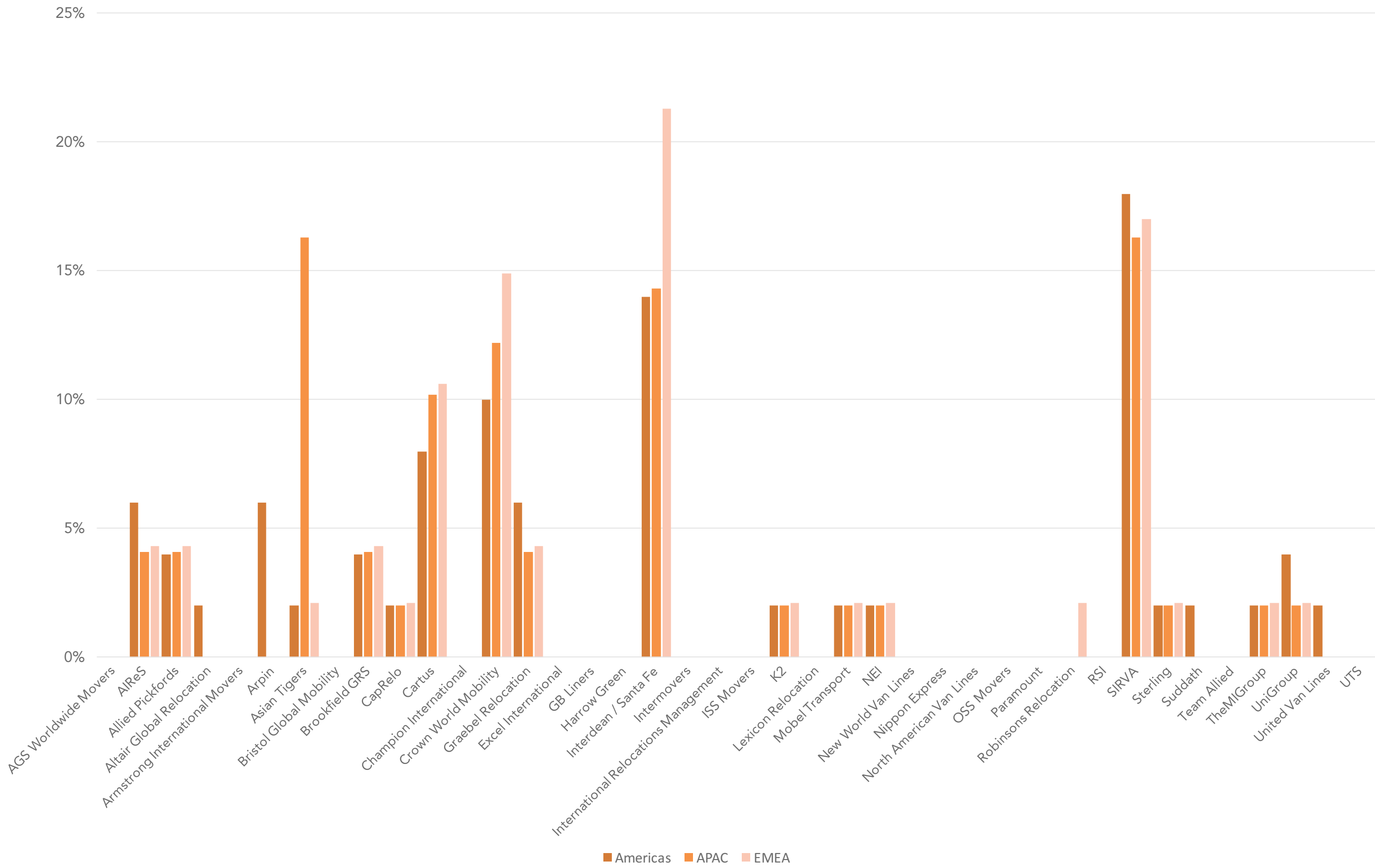
The global market was dominated again by Cartus with a healthy rise in EMEA and APAC (28.6% in both regions). SIRVA continued to make inroads in the Americas, along with Brookfield, Crown, Lexicon, NEI and Sterling. Most surprising was the drop-off in respondents from Weichert and MIGroup, but we stress the statistical margin of error in obtaining these results. Other providers included AIReS, CapRelo, CS Mobility, and Move Guides.

Who is your relocation/destination services provider?



While Cartus remained top for relocation and destination services provider in the Americas and APAC, Santa Fe led the way in EMEA with 20.8% of the market. SIRVA, Brookfield, Crown Relocation, Graebel and Weichert all performed well in EMEA and APAC with captures of over 5% of the available market. Also mentioned was the use of different providers for each country, a variety of partners, a synergy between two or more vendors (such as Lexicon and MIGroup) and internal HR teams.

Who is your removals and household goods provider?



The wide variety of removals and household goods providers continued, with 74% of the market in the Americas captured by providers outside this list. APAC fared better, with just under half of the market (46.9%) going to other providers, and in EMEA over half of the market (57.5%) belonged to other providers not listed.

Of the respondents that chose one of the listed providers, the above graph represents the total 100% sum outside the removed 'other' responses.

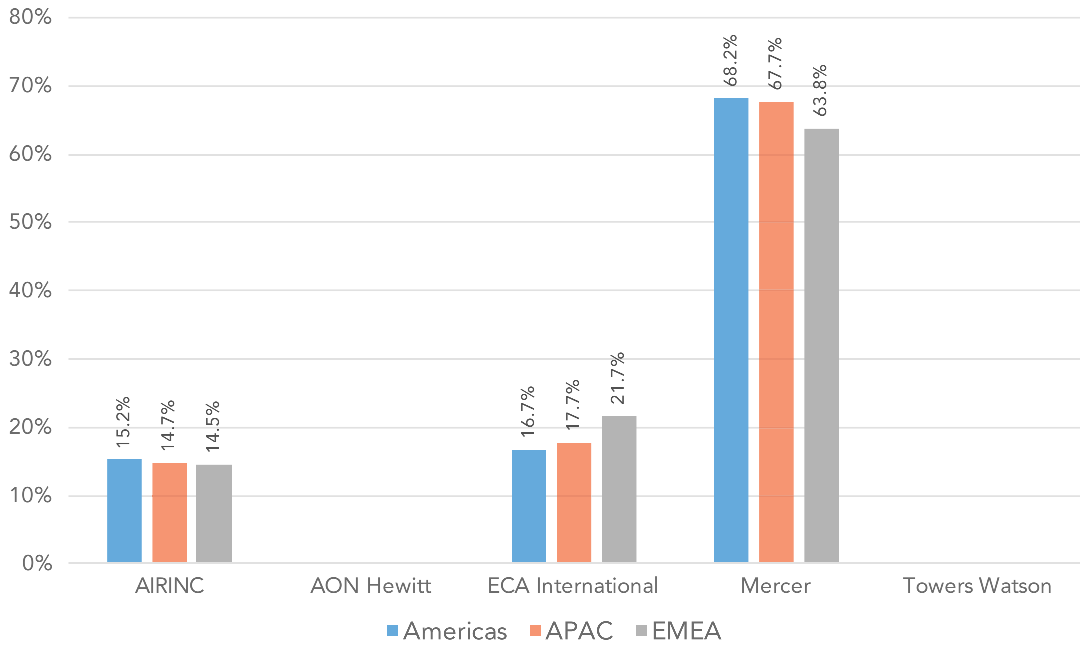
In the Americas, the most popular choice was SIRVA with an 18% share, followed by Interdean/Santa Fe with 14% and Crown with 10%. Cartus held 8% of the market, while AIRes, Arpin and Graebel took 6% each. Allied Pickfords, Brookfield and UniGroup all held 4% of the market, leaving Altair, Asian Tigers, CapRelo, K2, Mobel Transport, NEI, Sterling, Suddath, TheMIGroup and United Van Lines with 2% each.

In APAC, Asian Tigers and SIRVA shared 16.3% of the market, capturing the highest percentage. They were followed by Interdean/Santa Fe with 14.3% of the market, Crown Worldwide Mobility on 12.2% and Cartus with 10.2%. There was minimal growth from other providers. However, both AIReS and Graebel fell to 4.1% in APAC versus
6% in the Americas, UniGroup fell to 2% of the market and Arpin fell to 0%. Allied Pickfords and Brookfield both achieved 4.1% of the market and CapRelo, K2, Mobel Transport, NEI, Sterling and TheMIGroup each took a 2% market share.

In EMEA, Interdean/Santa Fe led the way with 21.3% of the market. This was followed by SIRVA at 17%, Crown Worldwide Mobility at 14.9% and Cartus at 10.6%. The others all fell below 5% of the market share.

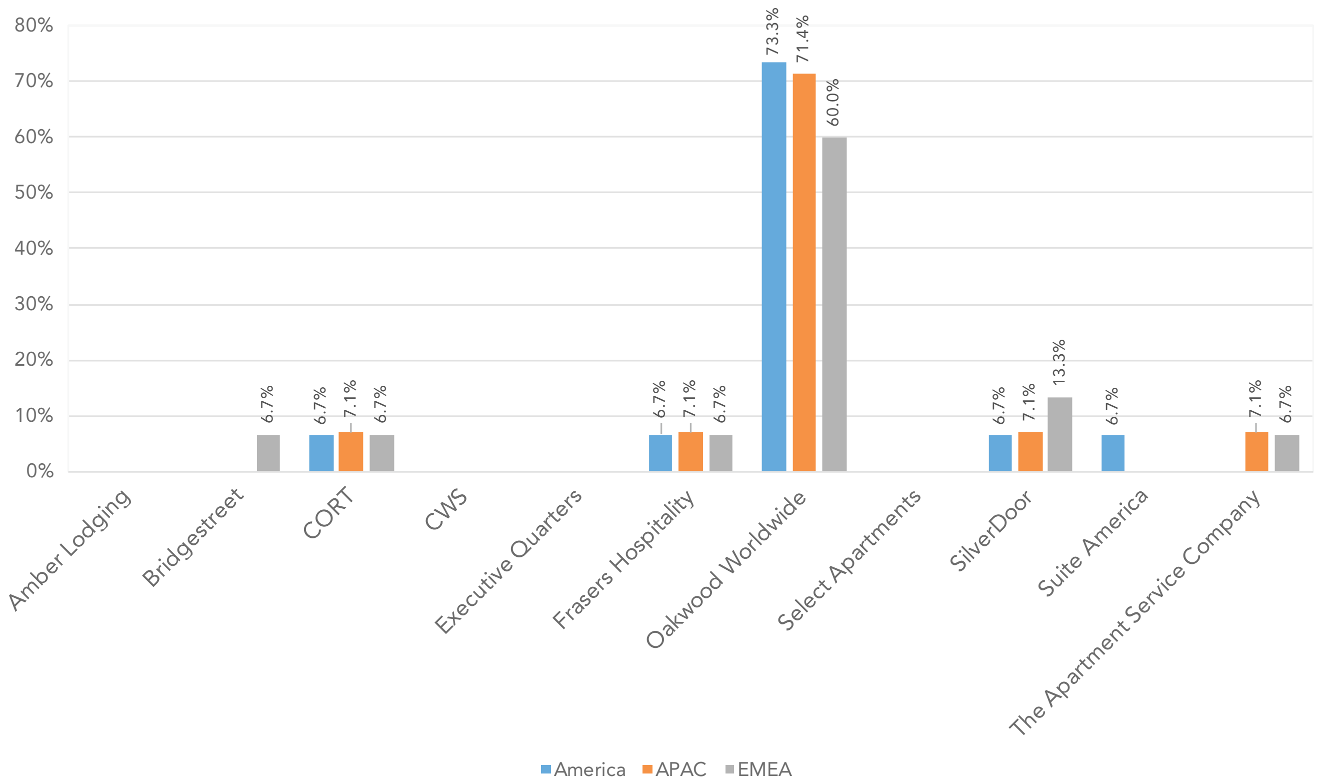
What other providers were mentioned? Atlas, Cornerstone, DT Moving, Harmony Relocation, Interconnex, MSI, Team Relocations, Weichert, Icon Relocation, CS Mobility and Gosse. There was also a trend towards decentralization with local affiliates selecting and a varying number of providers, dependent on the region.

Who is your cost-of-living data provider?



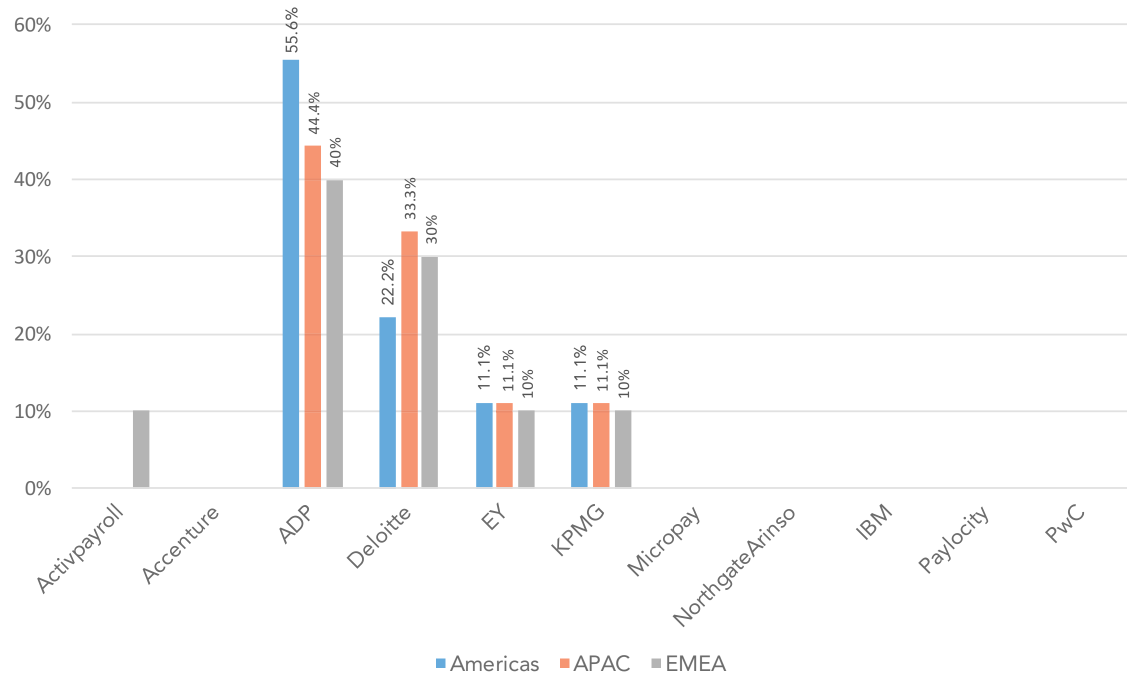
Although Mercer maintained its position as market leader and capitalised on it in all three regions, ECA International had growth in EMEA compared to the previous year. AIRINC, however, saw some reduction. No other providers were highlighted by respondents.

Who is your serviced accommodation provider?



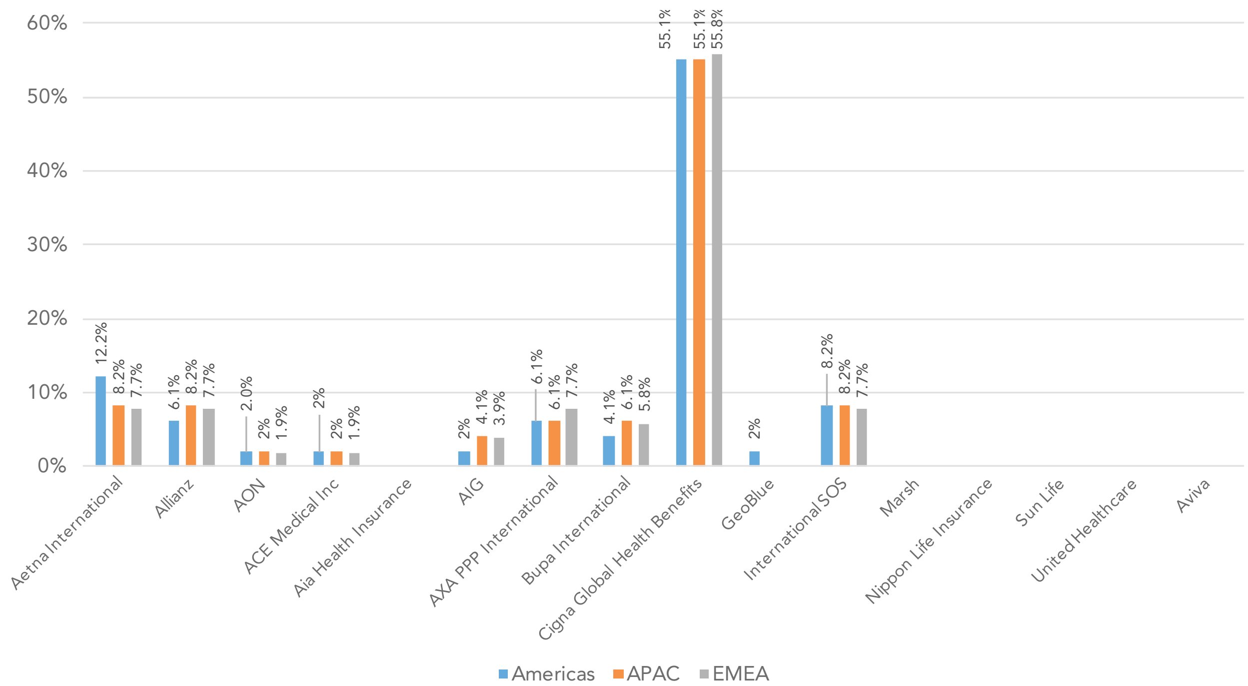
Oakwood's market share has exploded this year. The centralization of serviced accommodation appears to be popular with corporate mobility professionals, probably for ease of centralization across regions. Other vendors included AIReS, Brookfield, Cartus, Cornerstone, Crown, MSI, National Corporate Housing and Weichert, showing a healthy mix of corporate housing providers, with the booking managed through relocation management companies.

Who is your payroll provider?



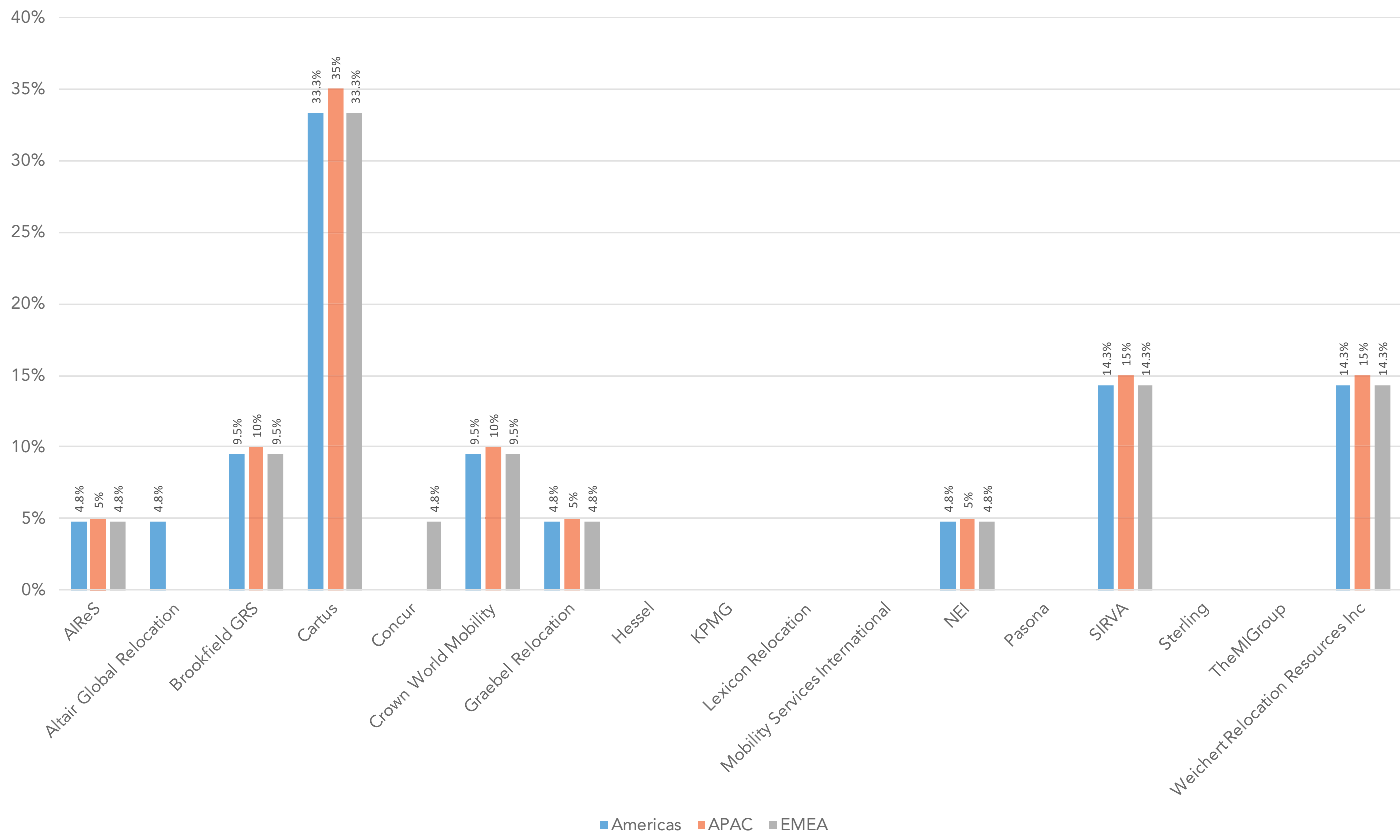
ADP not only remained top but grew its market share, while EY and KPMG grew nominally in the APAC region. Also highlighted were Grant Thornton, Polaris, Expaticore, FESCO, Kirchliches Rechenzentrum, RMC Management and the use of in-house teams.

Who is your international medical cover provider?



Cigna once again captured the largest portion of the market for international medical cover with a healthy 55% across all regions. In the Americas, Aetna (12.2%), International SOS (8.2%), Allianz (6.1%) and AXA PPP (6.1%) all took more than 5% each while the others had between 2% and 4.1% of market share. In APAC, Aetna fell to 8.2%, Allianz rose to 8.2% and International SOS and AXA PPP remained steady at 8.2% and 6.1% respectively. BUPA International climbed to a 6.1% market share. In EMEA, numbers fell slightly except for AXA PPP, which rose to 7.7%. Other providers of international medical cover included AHI, Henner, MSH/Previnter, WelCare and XN Financial, with a split between Cigna for assignees and GeoBlue for business travellers.

Who is your expense management provider?



A very healthy segmentation of the market indicates a lot of choice. That said, Cartus grew its market share, becoming the clear market leader with a standard deviation of approximately 33.3% across all regions (+/- in APAC & EMEA).

SIRVA and Weichert remained level in the Americas on 14.3%, while Brookfield and Crown both captured 9.5%.

In APAC, Weichert and Sirva climbed to 15% each, Brookfield and Crown to 10% and NEI, AIReS and Graebel all to 5% of the market.

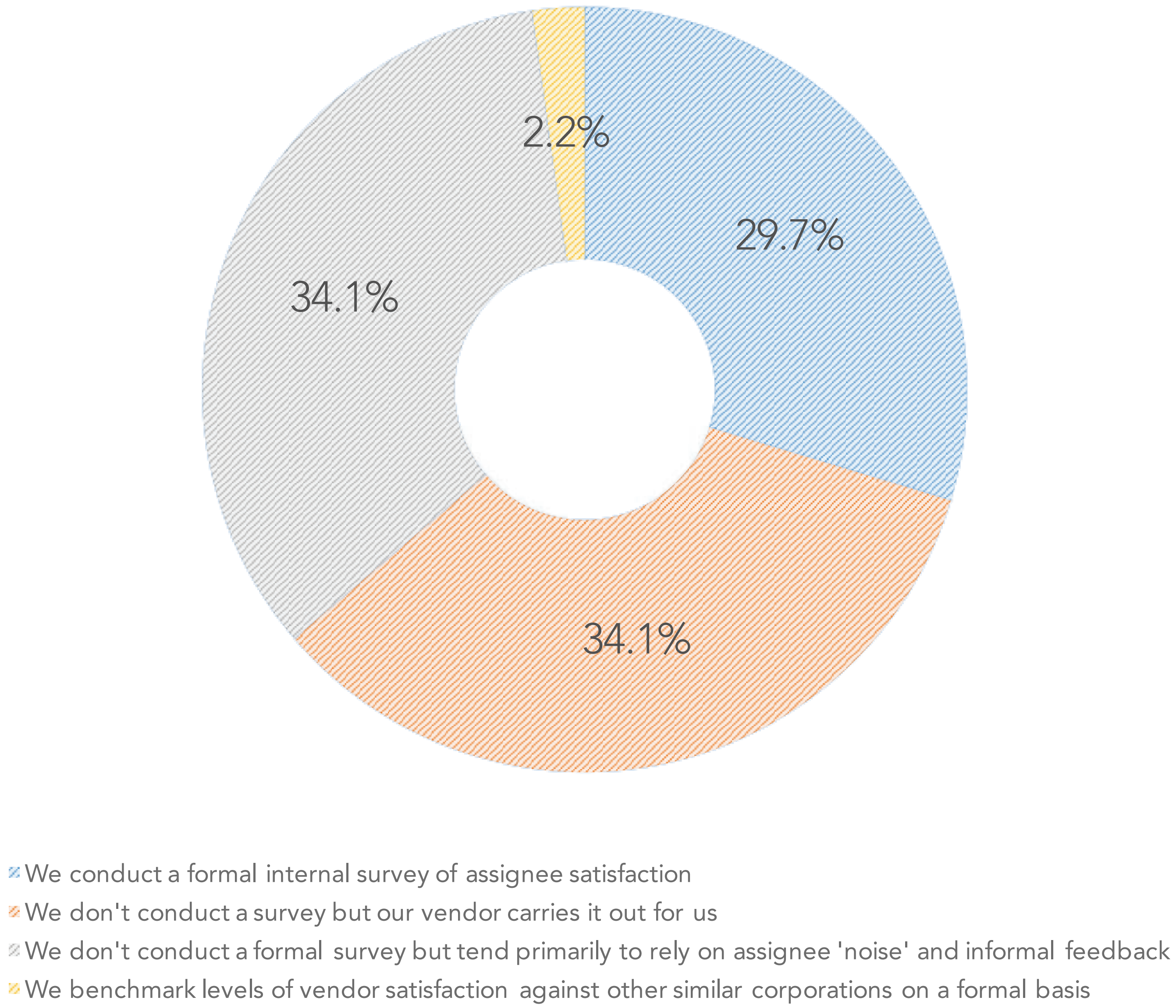
As in the Americas, Weichert and SIRVA returned to 14.3% market share in EMEA, as did Brookfield and Crown to the 9.5% indicated in the Americas. AIReS, NEI, Graebel and Concur all had 4.8% of the EMEA market.

Other companies indicated as expense management providers included AECC, CapRelo, Cornerstone, Lexicon with MI, NuCompass and Polaris.

VENDOR MANAGEMENT

Vendor management – both corporate and service provider – is one of the key challenges for global mobility professionals. This section analyzes how organizations manage their service providers and rate them for quality of service, value for money, technical competence and professionalism.

How do you manage vendor performance?



The shift continues towards a more formal approach of monitoring vendor performance. Relying on assignee 'noise' continues to decline, now at 34.1% (from 50% in 2013, 42% in 2014 and 37% in 2015). Formal internal surveys appear to have levelled out with less than 1% growth since 2015, compared to growth between 2014 and 2015 from 22% to 29%.

The reliance on vendors to conduct surveys on behalf of their corporate partners grew by 4.1%, capturing the majority of the difference from those relying on assignee 'noise'. The trend of increasing partnerships and reliance between providers and corporate mobility professionals for the purpose of data collection and reporting is confirmed in this growth.

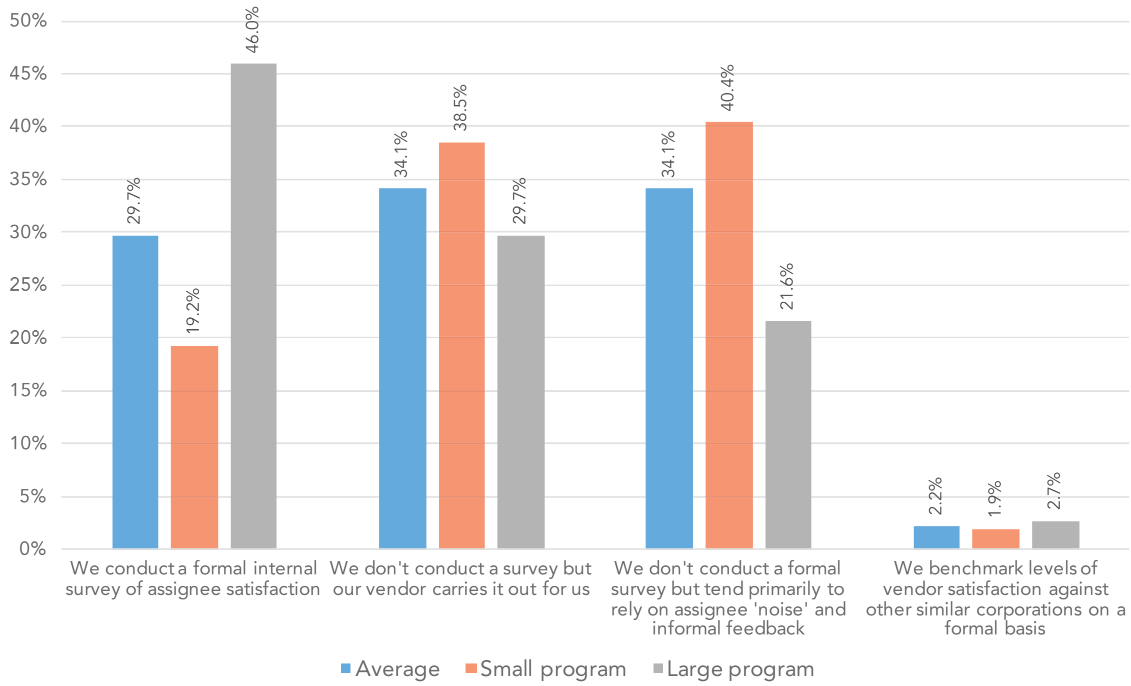
Detailed analysis: Small versus large programs and vendor performance

When we compared small and large programs against the average, some interesting trends emerged. Almost half of the large programs held a formal internal survey to assess assignee satisfaction, while the proportion of small programs doing so was 10% less than the average, at 19.2%. Small programs were more likely to rely on assignee 'noise' (40.4% versus 21.6% of large programs).

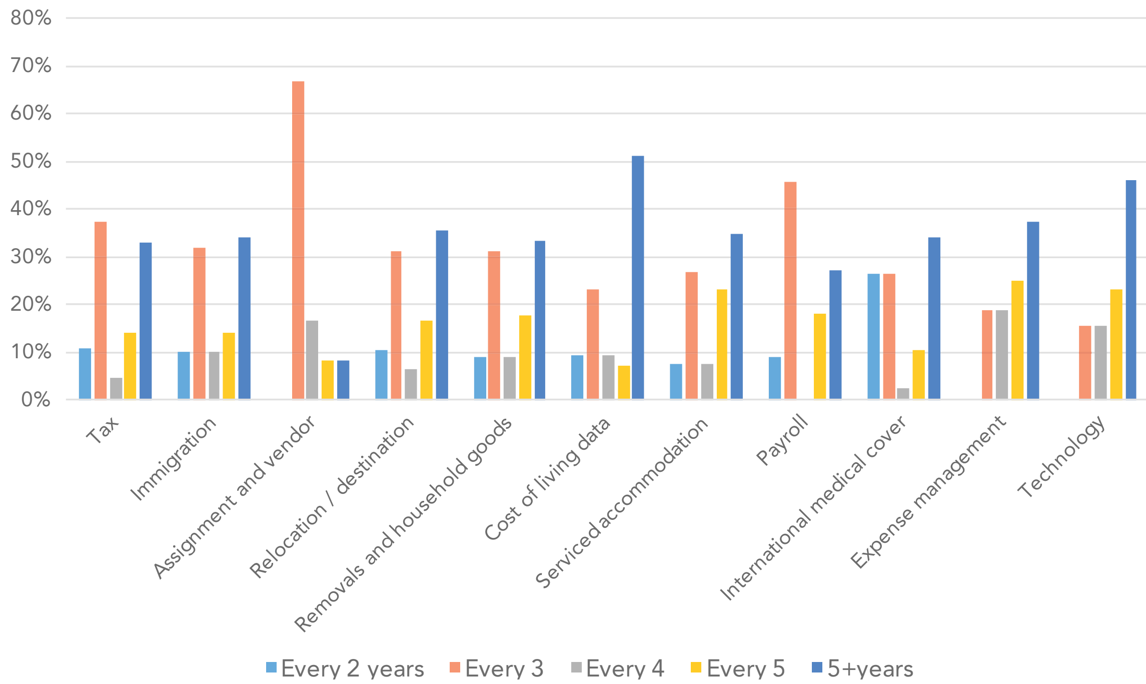
With fewer assignees, it is likely that global mobility professionals operating in smaller programs can connect more easily with their assignees than colleagues in large programs to obtain feedback.

Relying on vendors to carry out surveys was not preferred by either small or large programs as a method of vendor performance management, despite sitting in line with assignee noise as the most popular 'average' score overall.

By program size, how do you manage vendor performance?



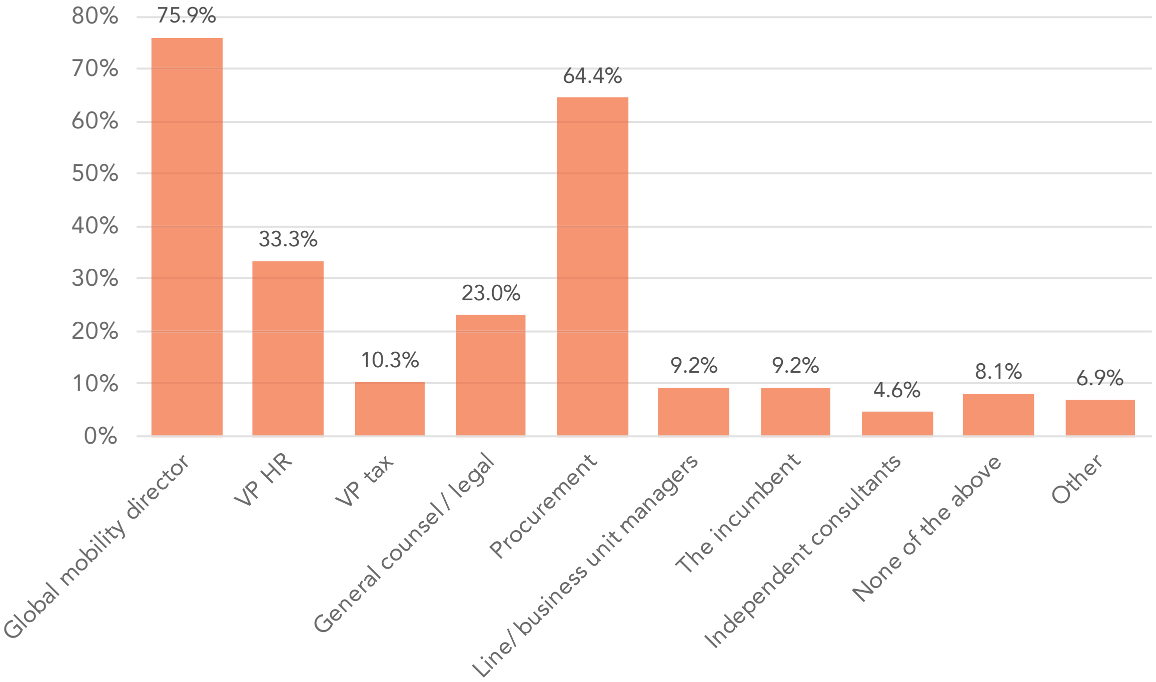
For our major vendors, we tend to go out to formal RFP on the following basis



Going out to RFP was most common at either three or five years plus; few RFPs were conducted at two-year intervals. The process of implementation with negotiation periods was a likely contributor to a reluctance to change provider before the three-year mark. Providers most likely to be changed within three years were assignment and vendor services (66.7%), payroll (45.5%) and tax (37.5%); those most likely to be changed after five years were cost-of-living data (51.2%), technology (46.2%), expense management (37.5%), relocation & destination services (35.4%), international medical cover (34.2%), immigration (34%) and removals and household goods shipping (33%).

Expense management and international medical cover had the smallest discrepancy between options, despite a clear preference for changing them after five years plus. The biggest discrepancy was in assignment and vendor services: with three years the most popular interval at 66.7%, the second choice, every four years, had a meagre 16.7%.

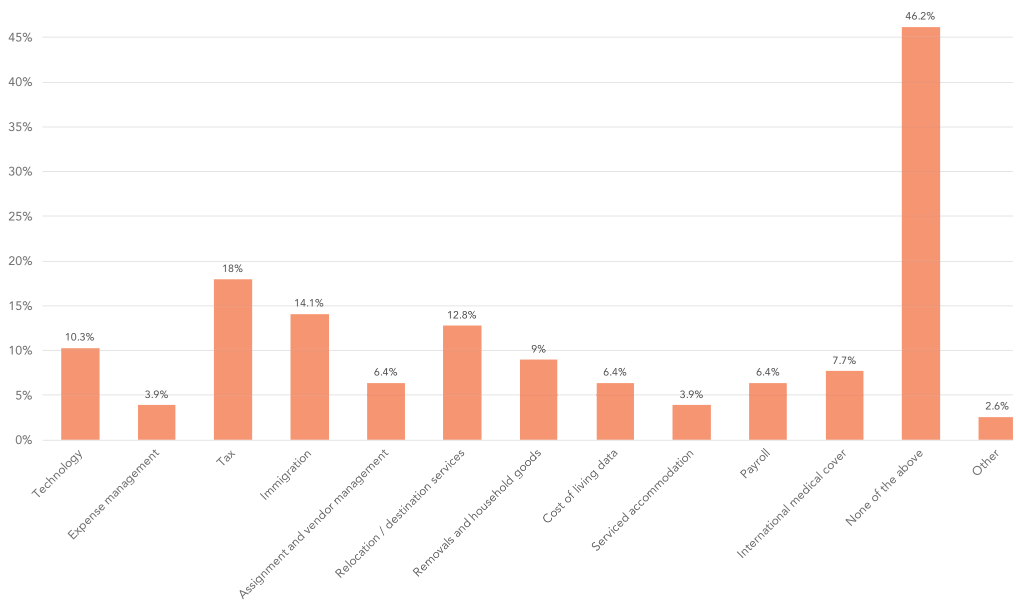
When you go out to RFP, which of the following are significantly involved in the process?



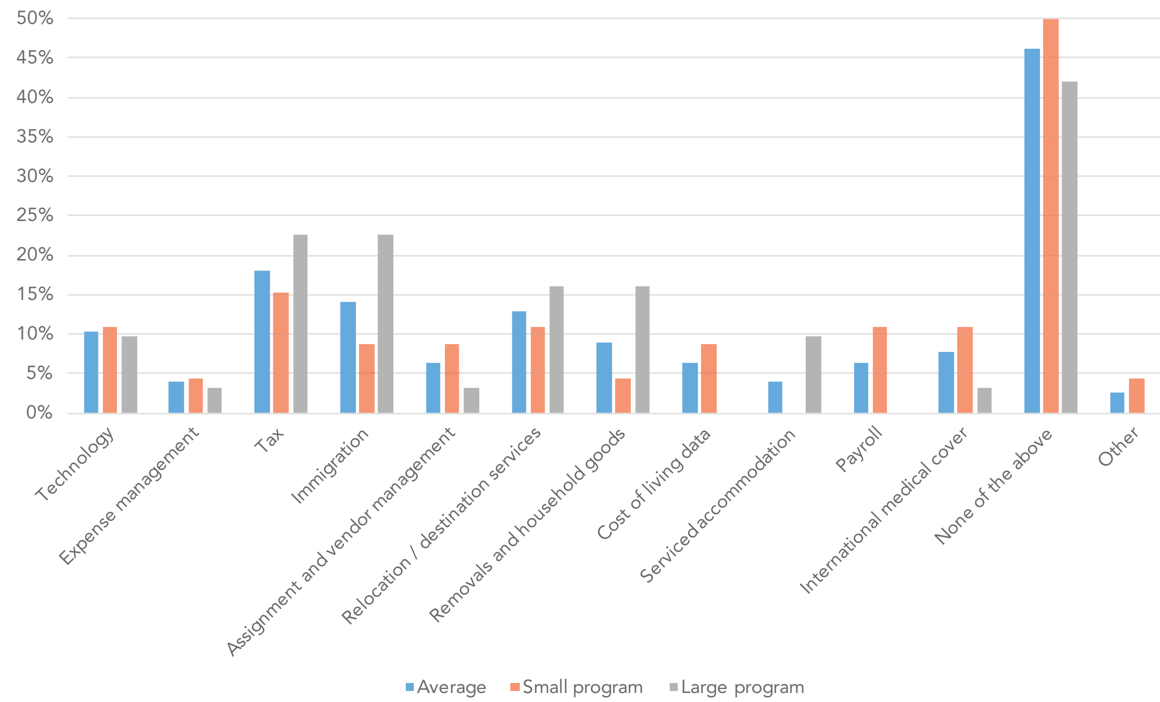
When undertaking the RFP process, there is not just the global mobility team to consider but the other stakeholders within the organization. Respondents were asked to 'tick all that apply' and we discovered a nominal fluctuation from 2015.

What RFPs, if any, are you planning in the next 12 months?

Nearly half of respondents had no RFPs planned in the next 12 months. The largest growth was from 3% of respondents in 2015 planning a cost-of-living data RFP to 6.4% in 2016. Immigration and payroll RFPs rose slightly (both less than 1%). Reductions were seen in all other categories, particularly in relocation and destination services (down from 19% to 12.8%) and removals and household goods (down from 15% to 9%).

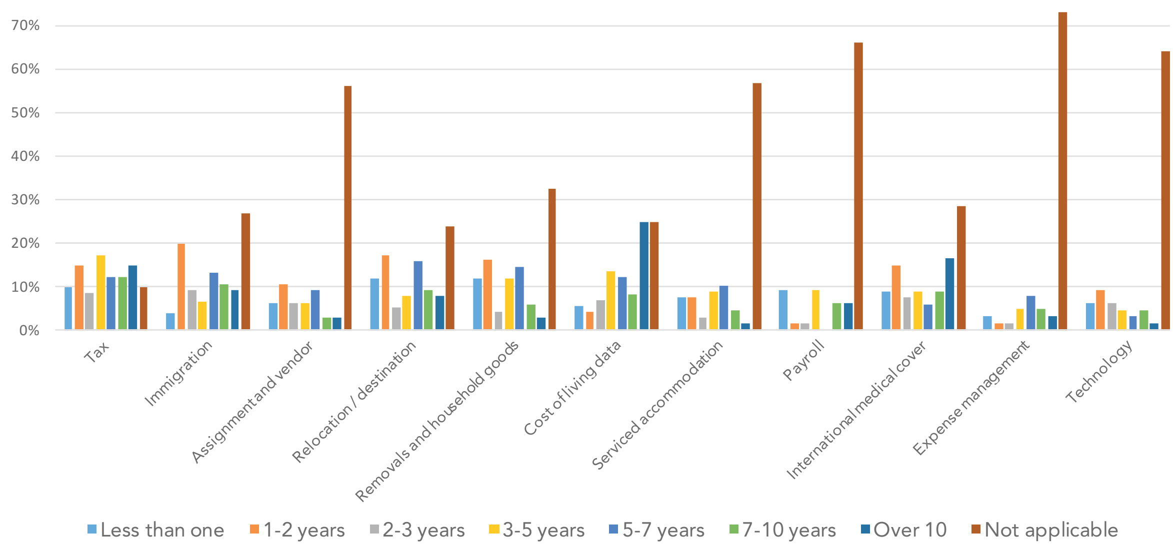


By program size, what RFPs, if any, are you planning in the next 12 months?



Large programs were more likely to be going to RFP in the coming year, except in technology, payroll and international medical cover. Despite similar numbers of small and large programs planning technology changes (and small programs only just above the average), this may be due to the emergence of more small-scale global mobility programs, and the need for more robust reporting and solutions as they grow to meet business objectives.

How many years is it since you switched a major service provider in these categories?



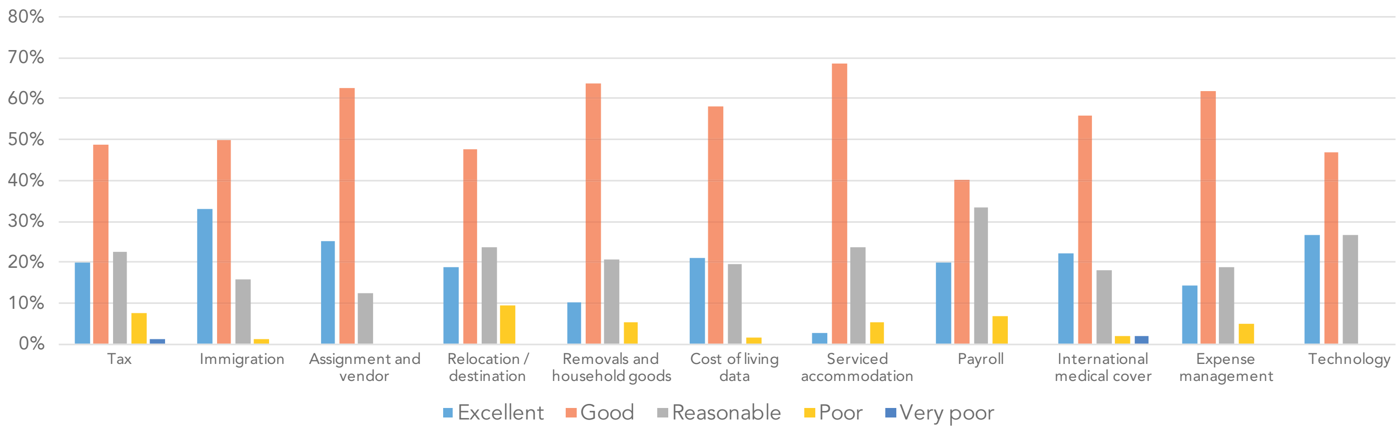
Cost-of-living data remains the least likely service to be switched, with nearly a quarter of respondents indicating they have not switched in over 10 years. Payroll, serviced apartments and expense management all had very low overall scores but were high in the 'not applicable' category. This may echo previous analysis indicating some of these are remaining in-house.

In the past year, the largest switch of providers occurred in relocation and destination services, at 12%. Removals and household goods was close behind on 11.8%.

Changes were greater in the data for the past one to two years. Immigration providers had been switched the most, at 20%. This was followed by relocation and destination services at 17.3%, removals and household goods at 16.2%, international medical cover at 14.9% and tax at 14.8%.

Next we asked respondents for their level of satisfaction regarding their vendors' quality of service, competence, value for money and overall professionalism in delivery. We also asked if they would recommend their current suppliers to a friend in another organization.

How would you rate the overall quality of service you receive from each of your vendors in the following areas?



The good news is that very few respondents indicated that the service from their current vendors had fallen below a reasonable level of delivery.

The findings are broadly in line with those from 2015. The service most regarded as 'excellent' was immigration, scoring 32.9%. While 'excellent' ratings fell overall, 'good' ratings climbed across most industries, with an overall reduction in 'very poor', 'poor' and 'reasonable' services. This is a positive change in the market and indicates greater satisfaction with current vendors than in 2015.

Detailed analysis: by service line

Tax: While the service quality provided by tax stayed the same for 'excellent' ratings, there was a shift towards 'good' from 'reasonable', with 'good' climbing from 41% in 2015 to 48.8% in 2016.

Immigration: Continuing the trend set by tax, immigration experienced a rise in 'good' ratings at the expense of 'reasonable', indicating an overall improvement of services. The change included a 6% increase from 2015, with half of all respondents rating their immigration service provider 'good'.

Assignment and vendor services: This sector fell slightly in the 'excellent' category and in the 'reasonable' category. It achieved a 10.5% increase in 'good' as a result, from 52% in 2015 to 62.5% in 2016. Also in line with 2015 there were no respondents who found their service either 'poor' or 'very poor'.

Relocation and destination services: This sector experienced some of the biggest changes. 'Excellent' service fell from 25% of respondents to 19%; 'good' and 'reasonable' were similar to 2015. However, 'poor' service increased to 9.5% of respondents.

Removals and household goods: Traditionally a difficult category in which to achieve 'excellent', removals and household goods dipped further with this rating, losing 16% from 2015 to achieve only 10.3%. To compensate, however, the 'good' rating rose from 48% in 2015 to 63.8%, making removals and household goods the second-highest 'good' service across all lines.

Cost-of-living data: This sector also had a lower 'excellent' score (down from 29% to 21%), but increased its 'good' rating from 47% to 58.1% over the year.

Serviced accommodation: The sharpest drop was in the 'excellent' category, from 16% in 2015 to just 2.6%. That said, this was the service most considered 'good', at 68.4%. 'Reasonable' service fell by 3%, indicating an overall improvement in this category.

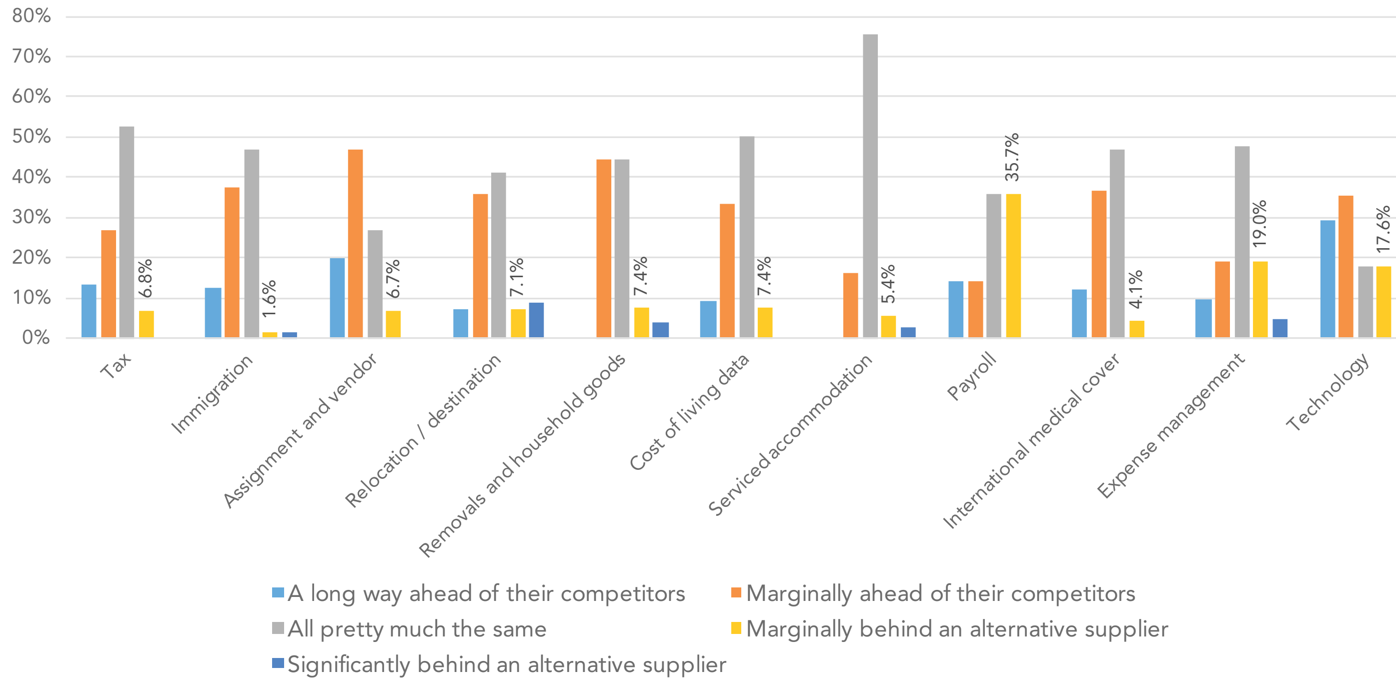
Payroll: This saw one of the largest gains in the 'excellent' category, up from 11% to 20%. 'Reasonable' service trended down, from 41% to 33.3%, while a 'good' quality of service remained stable.

International medical coverage: This remained broadly the same but with a slight increase in 'excellent' ratings.

Expense management: Compared to last year, expense management fell in the 'excellent' category, from 23% to 14.3%. The 'good' rating improved but there was a small increase for 'poor'.

Technology: This sector wiped out its 7% 'poor' rating from 2015 and increased its 'reasonable' score. Otherwise, 'excellent' and 'good' service quality remained in line with the 2015 findings.

How highly do you rate the technical competence and professionalism of your principal service provider in each of the following areas?

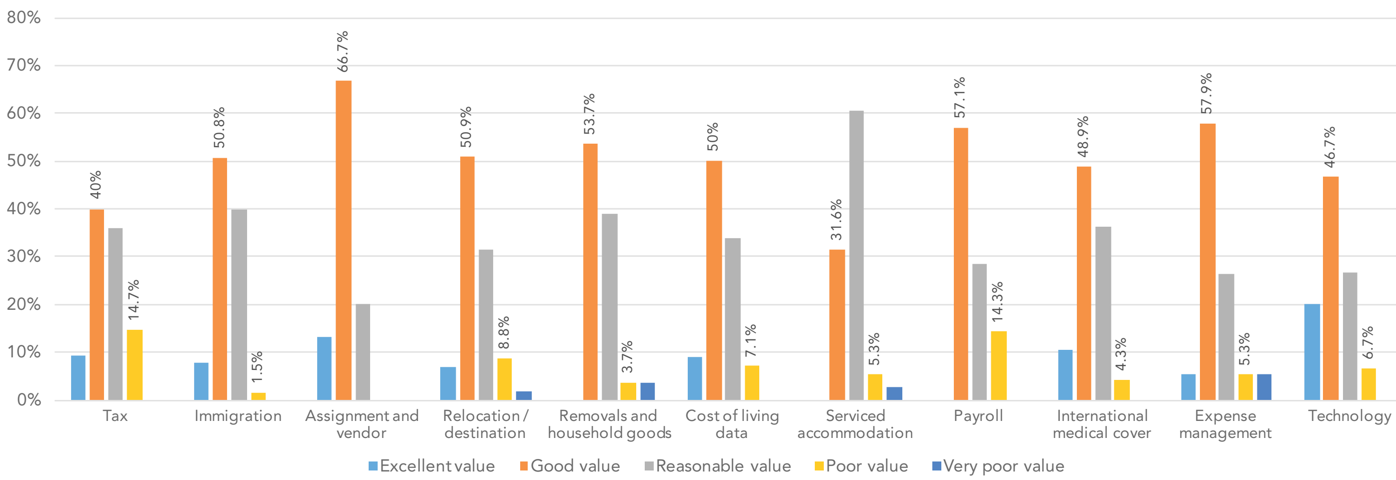


Few providers were identified as 'significantly behind an alternative supplier', with 'all pretty much the same' the dominant opinion on current vendors. Although there was an increase in providers deemed 'a long way ahead of their competitors', most were identified as only 'marginally ahead of their competitors'.

Technology providers achieved the best score for being 'a long way ahead of their competitors', while assignment and vendor services and removals and household goods were the only other services deemed 'marginally ahead'.

Payroll received the highest score for being 'marginally behind an alternative supplier', at 35.7%. When compared with the movement of payroll towards an 'excellent' quality of service, this raises an interesting debate: what is most important to a program – overall quality or technical competence? Can being 'marginally behind an alternative supplier' be overlooked if the quality of service is considered 'excellent'?

Do you get good value for money for the level of service you receive in these areas?



As in 2015, very few respondents felt they were receiving excellent value for money. Only three service lines managed to beat 10% of respondents rating them as such in 2016.

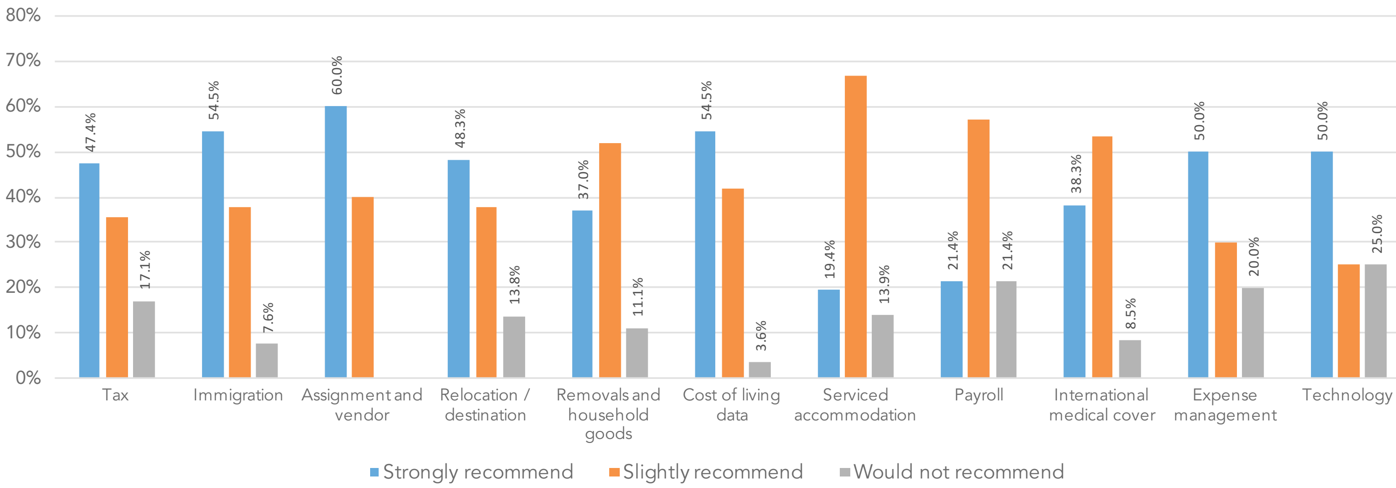
Technology was deemed the best value for money, scoring 20%, followed by assignment and vendor services on 13.3% and international medical cover on 10.6%.

Overall, the rating of services declined from 'excellent value' to 'good value'. The only service not rated 'good' was serviced accommodation, with a 60.5% score for 'reasonable value'.

Tax had the smallest difference between these two ratings, with 40% of respondents finding 'good value' in their tax provider and 36% finding 'reasonable value'.

Tax, payroll, relocation and destination services and cost-of-living data all scored above 5% for 'poor value'. Expense management was deemed the least value, with 5.3% for 'very poor value', but was the second-most highly rated as 'good value', behind assignment and vendor services. The continued reduction of costs in assignment and vendor services brought it the best score, with 66.7% rating it 'good value'.

If you were asked by a friend in another organization for your views on your service providers, how likely would you be to recommend them?



Several services captured more than half of the market in being deemed ones that respondents would 'strongly recommend': assignment and vendor management (60%), immigration (54.5%), cost-of-living data (54.5%), expense management (50%) and technology (50%).

Relocation and destination services (48.3%) and tax (47.4%) were more likely to be strongly recommended than slightly recommended but did not achieve a rating of 50% or more.

In the 'slightly recommend' category, serviced accommodation (66.7%), payroll (57.1%), international medical cover (53.2%) and removals and household goods (51.9%) all received scores above 50%.

Despite technology providers capturing 50% of respondents that would 'strongly recommend' them, 25% would not recommend their current provider to a friend at another organization, the highest score for this rating. Payroll scored 21.4% and expense management 20% for 'would not recommend'.

The widest disparity in answers was found in serviced accommodation, with 'slightly recommend' gaining the highest overall score at nearly 70% but a differential of only 6% between those that would 'strongly recommend' providers (19.4%) and those that 'would not' (13.9%).

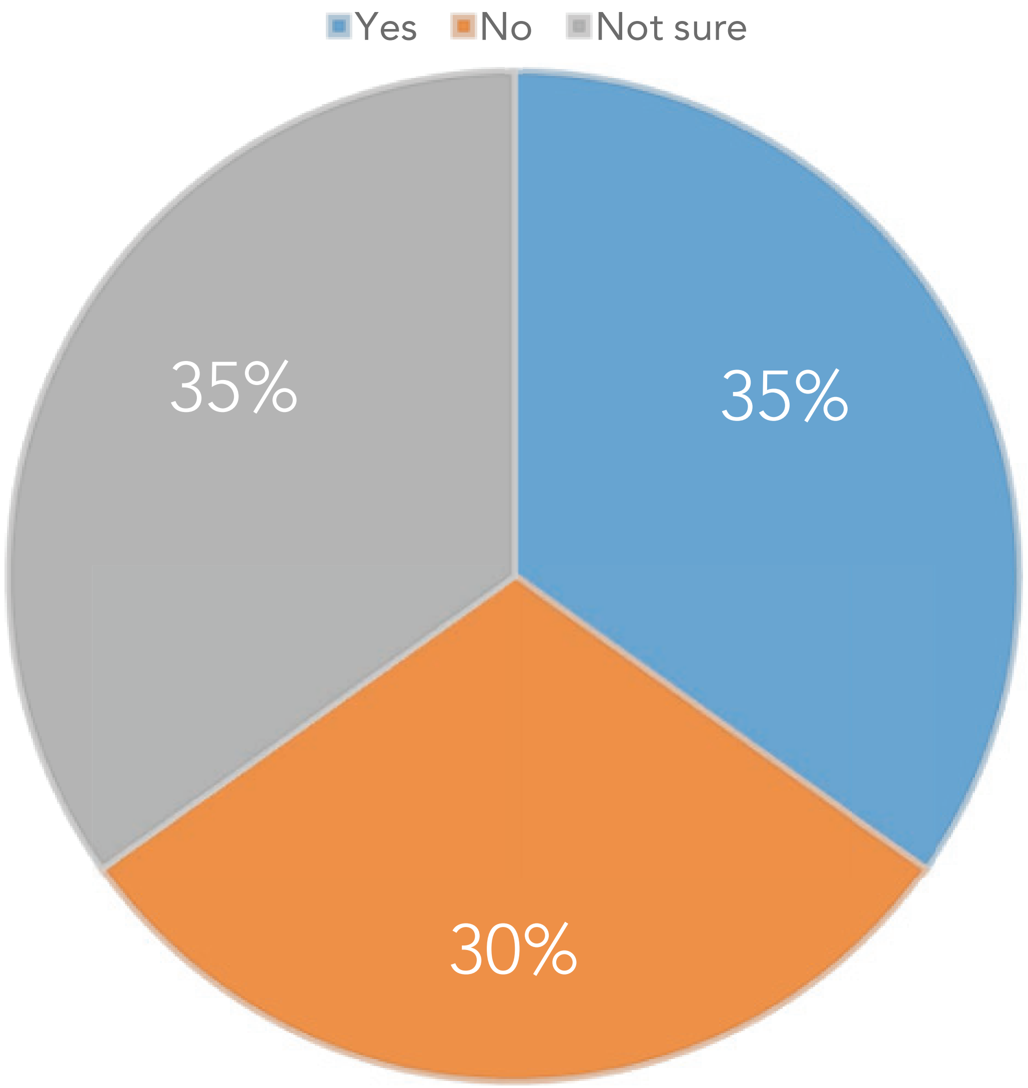
BREXIT

As the UK prepares for the changes necessitated by its planned exit from the European Union (Britain + exit = Brexit), we sought to understand the implications for global mobility professionals.

Do organizations expect multinationals to reduce their business in Britain, and which assignment types could change as a result of the decision to withdraw from the principle of free movement of people in other European nations?

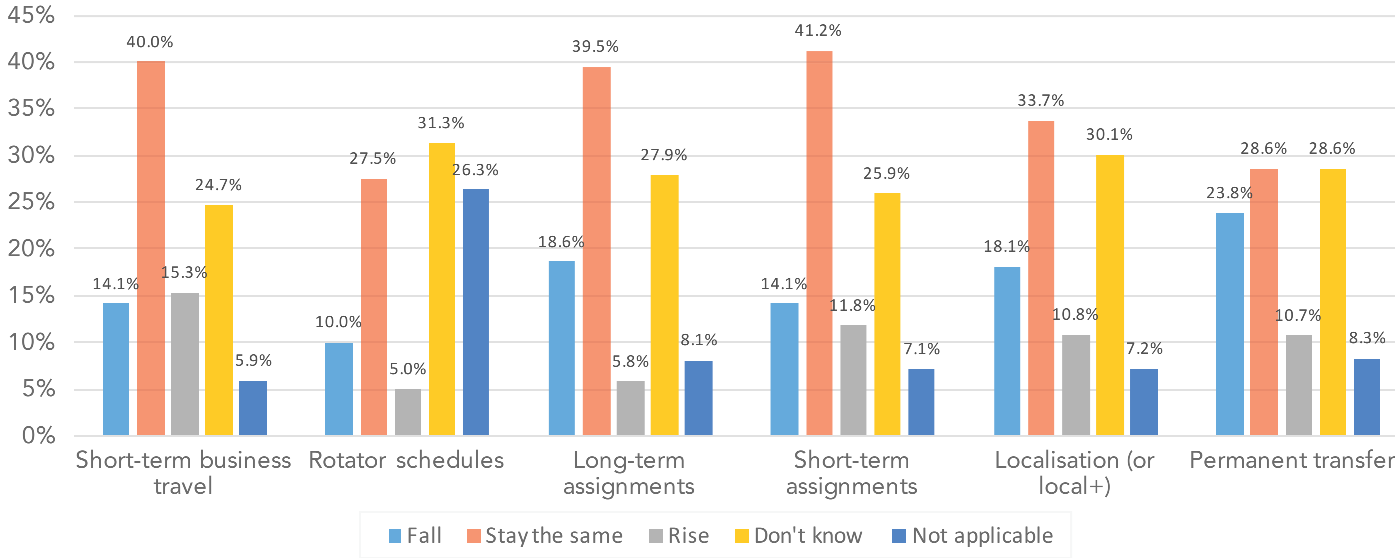
All information on Brexit was obtained during July 2016.

Do you think Brexit will change the willingness of multinationals to do business in Britain?



Opinion was fairly evenly split with 30% saying Brexit would not change the willingness of multinationals to operate in and move talent into the UK. Just over a third (35%) disagreed, predicting an impact on the market, while the same proportion declared themselves unsure of the effect of Brexit on multinationals' business in the UK.

Do you expect these assignment types to rise or fall in the UK following Brexit?



Despite the divided opinion over the impact of Brexit on multinationals doing business in the UK, there was a general sense that the number of assignment types was likely to stay the same.

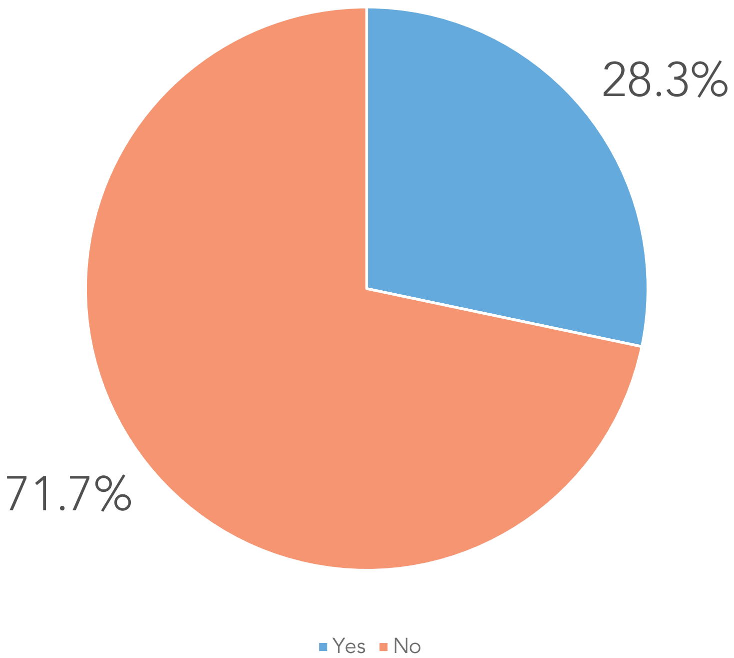
Across the board, expectations of rising assignment types were limited. But short-term business travel was deemed most likely to increase in assignments, at 15.3%, which is perhaps unsurprising as it may be the best solution for getting the right talent into the UK for a specified time.

Permanent transfers, meanwhile, were predicted to decline by a quarter of respondents, which is also no surprise. Prior to the Brexit vote, settlement of EU nationals in Britain was common. But this may now have to change, making a reduction in permanent transfers a solution.

Predictions of a rise in this assignment type, however, by 10.7% of respondents may be attributed to moving some European workers onto Indefinite Leave to Remain visas where applicable.

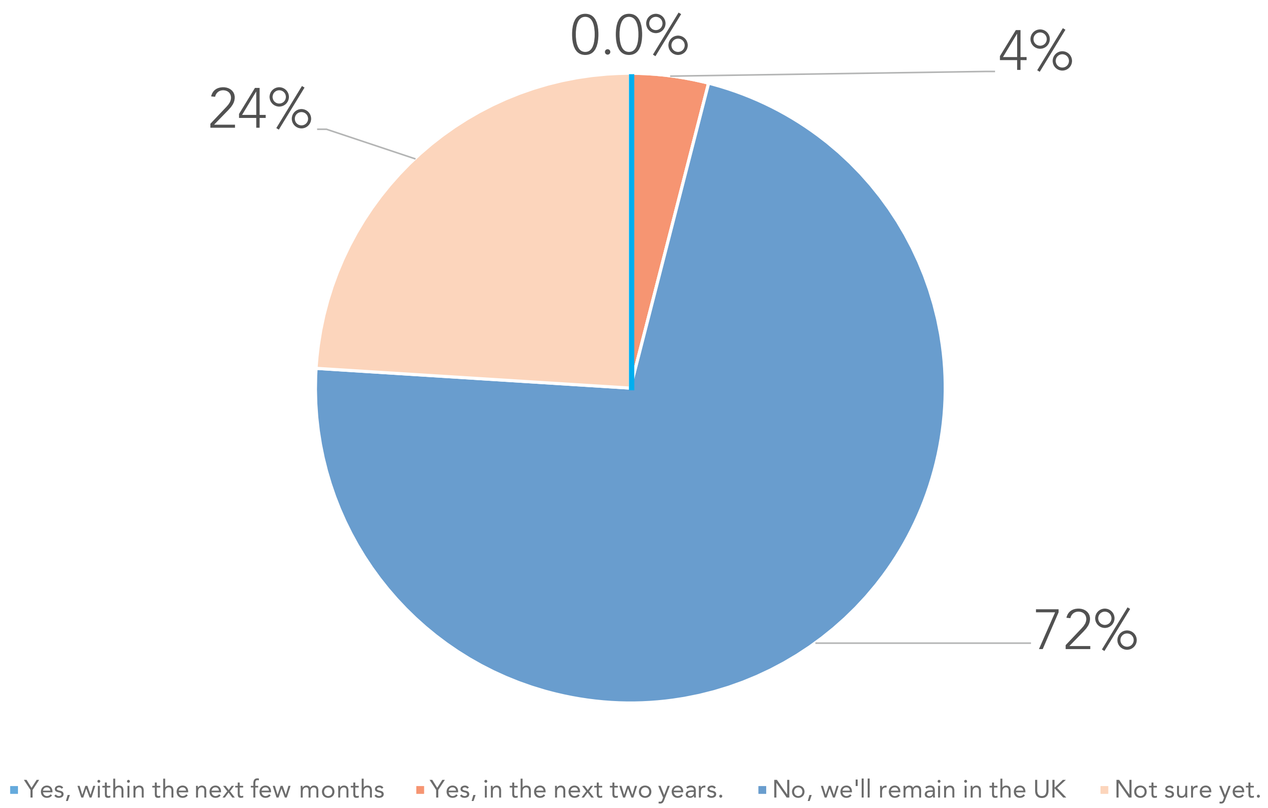
As we wait for more information on the extent of changes to UK immigration law post-Brexit, these numbers may of course fluctuate.

Are you based in the UK for work?



The majority of respondents were not based in the UK for employment, with nearly three-quarters working abroad.

Do you expect your in-house global mobility function to be moved or built up in your organization's EU-located offices?



Following the decision of some multinationals to cull their workforce in Britain, either through job reductions or relocation of teams to other EU nations, we wanted to examine whether internal teams would be subjected to the same movement.

The good news: 72% of respondents thought global mobility, where based in the UK, would remain there.

The bad news: a quarter were not sure. While this is not 'bad' news in the traditional sense, there is uncertainty around how Brexit will impact mobility programs, assignees and global staff, as well as a rising question of where global mobility itself will be asked to move.

CONCLUSION

This report aims to present the insight and information shared by corporate members of the FEM global mobility network. It is our task to amalgamate key data in the areas of outsourcing, vendor management, structure of the global mobility function and market share, to offer valuable benchmarking for global mobility programs across industries and regions.

While no two functions are identical, we hope the information within this report has given an interesting insight into how the wider market is building, maintaining and growing its internal global mobility teams.

In the years since this survey was first published, investment in global mobility has increased and its alignment has evolved. Today it is apparent that the partnership between mobility, talent and wider business is one of strategic importance for global organisations.

The position of global mobility teams within businesses remains under discussion as globalization continues, with both challenges and opportunities arising. As talent acquisition and retention enters a renaissance off the back of emerging nations, changing legislation and growing access to global markets, global mobility will be used to fulfil the expansion ambitions of businesses.

Of interest to us and potentially many of our readers is the increase in positive sentiment towards providers. Although the number of 'excellent' ratings has decreased, the uptick in services rated 'good' is a great sign of improvement in the vendor network and should enable survey readers from the supplier side to consider how to increase their service quality, value and professionalism to reflect excellence in 2017.

A return to centers of excellence and regional management has underscored the experience of larger programs in 2016, while smaller programs are managing their global mobility teams centrally. The differences between small and large programs offer fascinating insights throughout the report on how a program develops.

We also found interesting the likelihood of large programs to outsource, possibly because of a wish for global mobility managers and directors to spend less time on the administration of the service and focus instead on its strategic delivery to the business.

There was a wide range of responses on vendor management in terms of monitoring, frequency of review and performance rating. Some of the shifts in attitude towards providers' services were interesting and often positive.

FEM is grateful to all survey participants. Each response has contributed greatly to the success of the study.

The Forum for Expatriate Management
September 2016

APPENDIX A

LIST OF SURVEY PARTICIPANTS

- Abbott Laboratories
- Ageas
- Airswift
- Albemarle Corporation
- Altair Global
- ANZ
- AOC
- Aramco
- Arup
- Aspen Insurance
- AT Kearney
- Avaloq
- BAE Systems Inc
- Balfour Beatty
- Bombardier
- Cameron, a Schlumberger company
- Capgemini Australia Pty Limited
- Cargill
- CB&I
- CBI
- CBM International Office
- Chevron
- Cisco International
- Clinton Foundation
- Coats plc
- CSG International
- Datamatics Global Services Ltd
- Dell
- Discovery Communications
- Dun & Bradstreet
- ENGIE
- Expat Management Group
- Fidelity Investments
- Fluor Enterprises
- Foster + Partners
- Franklin Templeton
- Frontica Advantage
- Fujitsu
- G-Star
- Goodyear Dunlop Tires Operations SA
- Herbalife
- ICAP
- IHG plc
- IKG Global Consultants, LLC
- Imperial Brands
- Incitec Pivot Limited
- Ingersoll Rand
- Jacobs Engineering
- Johnson & Johnson
- Kellogg Company
- Kerry Group
- King
- MMC
- MUFG Union Bank
- MUFG Union Bank, NA
- Management Sciences for Health
- Marsh & McLennan
- Marsh & McLennan Companies
- Mattel
- Mercer
- Merlin Entertainments plc
- Monadelphous Group Limited
- NNE Pharmaplan
- Oliver Wyman Pte Ltd
- Orica
- PAREXEL International
- Pegasystems
- Rackspace
- Red Hat Inc
- RELX
- Roc Oil Company
- Roche
- Rohde & Schwarz GmbH & Co KG
- SCHOTT AG
- Samsung
- Santa Fe Relocation Services SA
- Sapient Corporation
- Shire
- Siemens
- Solera
- Solvay
- The Body Shop International
- The Brookings Institution
- Thomson Reuters
- TOMTOM
- UCB SA
- Umicore USA Inc
- Vesuvius plc
- Western Digital
- Wolseley
- Shure Incorporated

APPENDIX B

LIST OF SERVICE PROVIDERS

ACE Medical Inc
Activepayroll
ADP LLC
AECC
Aetna International
AGS Worldwide Movers
AHI
AIG
AIReS
AIRINC
Allianz
Allied Pickfords
Altair Global Relocation
Amber Lodging
AON Hewitt
Armstrong International
Arpin Group
Asian Tigers Mobility
Aspire Mobility
Atlas
AXA PPP

Baker & McKenzie
Baker Tilly
BDO
Berry, Appleman & Leiden LLP
BridgeStreet
Bristol Global Mobility
Brookfield GRS
Bupa

CapRelo
Cartus
Celergo
Champion International
Cigna Global Health Benefits
Cornerstone
CORT
Crown World Mobility
CS Mobility
CWS

Deloitte
Direct Document Services
DT Moving
Duane Morris
DWI

ECA International
Emigra Worldwide
Equus Software
Excel International
Executive Quarters
Expat International
Expaticore
EY

Ferguson Snell
Foster LLP
(formerly FosterQuan LLP)
Fragomen LLP
Frasers Hospitality

GB Liners
GeoBlue
Global Tax Network
Goldstein & Lee
Gosselin Group
Graebel Relocation
Grant Thornton
Greenberg Traurig LLP

Harmony Relocation
Harrow Green
Henner
High Street Partners
Hillbrook
Hodgkinson Law Group
HR Toolbox

Icon International
IMS
Interconnex
Intermovers
International SOS
Isaac's ISS Movers

Jethmalani & Nallaseth PLLC
John Allis & Co

K2 Corporate Mobility
Kingsley Napley
Kirchliches Rechenzentrum
KPMG

Lexicon Relocation

Mercer
Mobel Transport
Morgan Lewis
MOVE Guides
Mundanzas Rumbo
MSH
MSI

National Corporate Housing
NEI
Newland Chase
New World Van Lines
North American Van Lines
NuCompass

Oakwood
OneSource

Parker Poe
Pearl Law Group
Pioneer
Plus Relocation
Polaris Global Mobility
Previnter
ProLink
Proskauer
PwC

Relocation Synergy Group
Robinson Relocations

Santa Fe/Interdean
Select Apartments
Seyfarth Shaw LLP
SilverDoor
SIRVA
SSBB
Sterling Relocation
Suddath
SuiteAmerica

Team Relocations
The Apartment Service Company
TheMIGroup
Towers Watson
TTA Relocation

UniGroup
United Van Lines

Weichert Workforce Mobility
Welcare
WTS

Xchanging HR Services
XN Financial

APPENDIX C
OUR SURVEY SPONSORS

Relocating your employees doesn't have to be a stressful experience – for them or for you. Graebel helps ensure an exceptional experience for your employee and his or her family, whether the assignment is across the country or around the globe.

Global 1000 companies count on Graebel for end-to-end assignment management solutions, expert policy consulting, and administration of their global mobility programs in 165 countries. With operational centers in the Americas, Europe, and Asia, we're well positioned to support your employee every step of the way during their journey, no matter what the language or time zone. That's why 98% of transferees and assignees we work with give their Graebel consultant the highest satisfaction score.

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More than 200 global organizations rely on cloud-based technology and mobility solutions from Equus to support their talent mobility programs. Equus technology allows program managers to focus on adding value to their business by automating mundane, transactional work.

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Contact: Mandy Hawks
T: 303-292-4200 ext. 235
E: mandy.hawks@equusoft.com
W: www.equusoft.com

FRAGOMEN
WORLDWIDE

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Fragomen is widely recognized as the world's leading global corporate immigration services provider. The firm's exclusive focus on immigration counseling and services and strong global presence allow Fragomen to provide clients with high-quality, innovative, sustainable and cost-effective worldwide immigration services. Fragomen has represented a broad range of companies, organizations and emerging businesses, utilizing a sophisticated, centralized, and high-touch service delivery model.

Founded in 1951 in the United States, Fragomen has developed into a truly global presence, with more than 40 offices in 20 countries across every region of the world. Today, they have over 3,100 immigration and support staff dedicated to anticipating and proactively meeting client needs. The firm's growth has been bolstered by its eye towards technological and strategic solutions, hiring of creative problem-solvers, and focus on meeting clients on their terms.

Fragomen's innovative technologies and methodologies to optimize the value of its services are a cornerstone of its service excellence. By building teams of professionals to meet client needs, resources are focused on key issues such as government strategies and relations, global knowledge and professional practices. The firm also utilizes a proprietary case management and reporting tool to offer case processing efficiencies and management information reporting, and remains at the cutting edge of information sourcing and delivery techniques.

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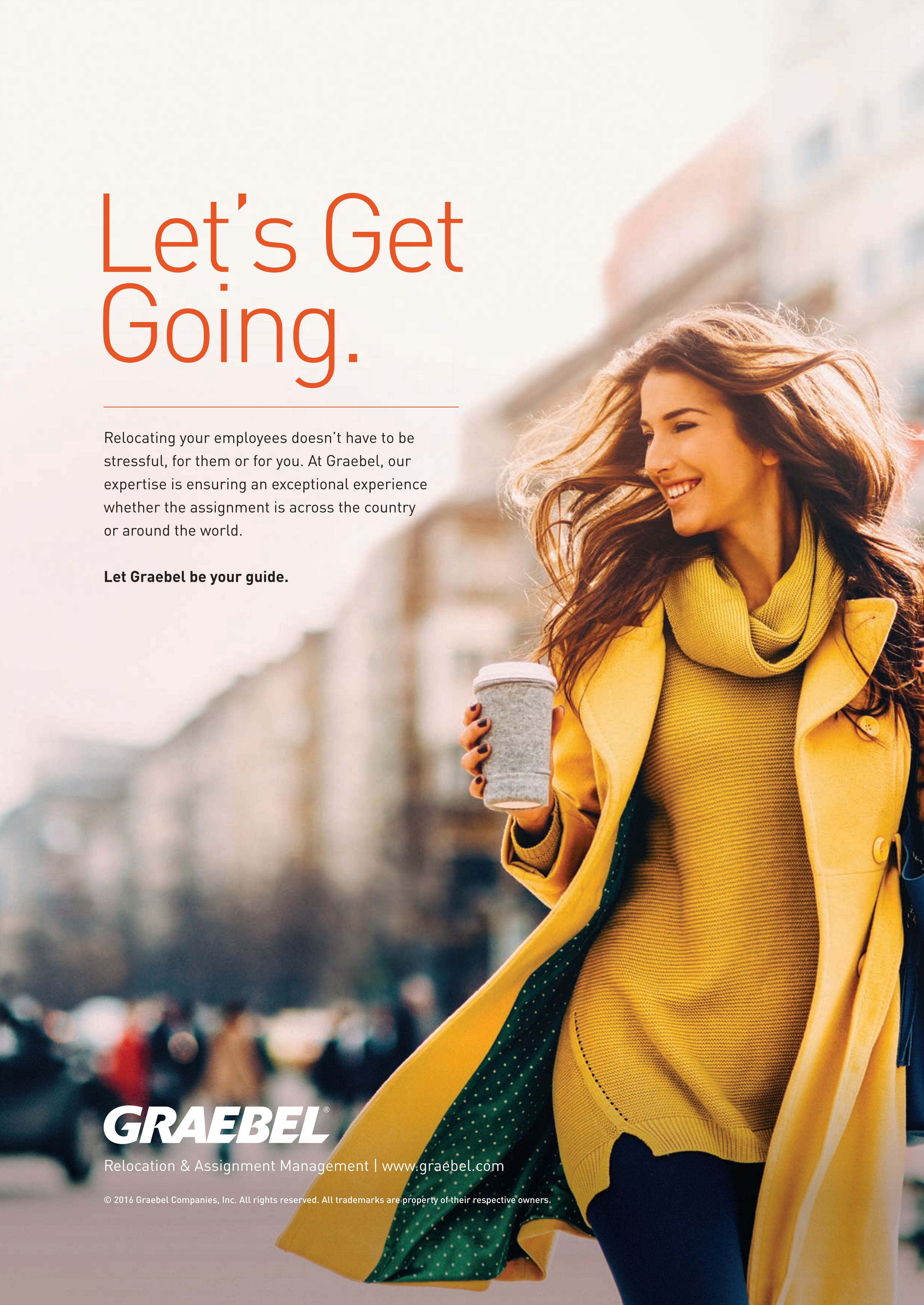
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