

MANAGING THE GLOBAL MOBILITY FUNCTION

A BENCHMARKING
STUDY 2017




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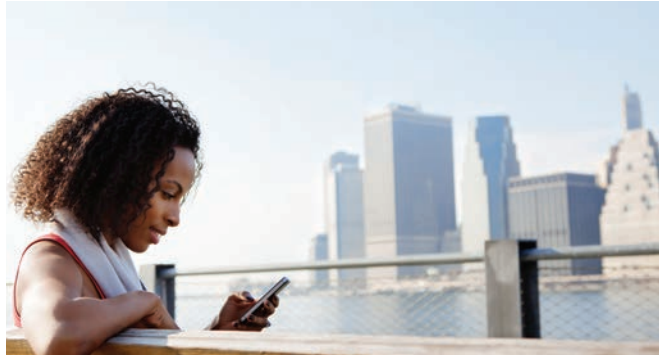
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INTRODUCTION



Claire Tennant-Scull

Head of Content

Forum for Expatriate Management

Welcome to the Forum for Expatriate Management's eighth annual Managing the Global Mobility Function report.

This year, mindful that our members' workloads do not get any lighter, we revised and edited the survey, restricting it to just 20 questions. However, we kept the focus on the same key issues and retained the format of many of last year's questions so that we could make a reasonable comparison with 2016.

This report is compiled from the results of the survey, which was completed by 166 senior global mobility professionals worldwide. The aim here is to provide a snapshot of the industry – and to offer useful insights into current practice.

In 2016, the expectation was that global mobility teams would continue to grow in size and influence, and that the number of assignments would also increase to keep pace with what then seemed to be the unstoppable force of globalisation. However, this year's results reveal a rather different

emerging pattern – and one that seems to be occurring in each of the world's major regions when we consider the diverse locations of those who have taken part in this research.

The report throws up a number of surprises and much of what looked like an industry trend 12 months ago now seems to have altered course.

Business is undoubtedly operating in a more turbulent climate, but several results of the survey show also that global mobility has achieved a greater level of recognition as a valuable part of an organisation's strategy. We also note what appears to be increasing satisfaction with the industry's service providers, again pointing towards a more mature and established sector.

We hope that you find this report a useful and interesting read. FEM would like to thank all those who took part in the survey – and, of course, the report's sponsors, Fragomen and Oakwood Worldwide.

EXECUTIVE SUMMARY

For this year's MGMF survey we streamlined the number and length of the questions we set but, in order to be able to make useful comparisons, essentially we asked about the same key issues as in 2016.

Of course, we have many respondents who take part every year but we acquire new ones too. While this means that the conditions in which the survey is conducted change from year to year, it also indicates how the industry is changing as a whole.

The key findings of our survey:

Defining roles:

- Compared with the 2016 MGMF survey, this year's research reveals a slight decline in the number of Global Heads of global mobility and a small rise in the number of Regional Heads, which perhaps is a sign of increasing decentralisation.
- Of those who replied that their title was 'other' than those listed, the majority identified themselves as consultants or specialists, which mirrors the overall employment trend towards more freelance workers and may be a reflection of the continuing emphasis on keeping down costs.
- Two of the most interesting points are that the dominant roles all include the label 'global mobility', and those with 'HR' in their title are in the minority.

Company headquarters:

- In 2016's survey, 46% of companies



that responded were headquartered in North America, but in 2017 that figure has dropped to 29.5%.

- By contrast, the number of companies based in either Continental Europe, Australia/New Zealand or Asia has increased in each case.

Industry sectors:

- Certain industries posted fewer responses this year, which may reflect the mixed fortunes of economies worldwide, in turn affecting the numbers and types of assignment. For example, there were more participants from the manufacturing, pharmaceutical/bio-tech, leisure, hospitality and tourism sectors in 2016.
- Energy, oil & gas, however, which has been going through difficult times, shows a slight increase in participation

since 2016, rising from 10.5% to 12.1% in 2017.

- The biggest increase in participation comes from the banking and finance sector, which has grown from 12% in 2016 to 22.3% in 2017.

Global mobility structure and reporting:

- In stark contrast to the current enthusiasm for linking global mobility to talent management, only 8.8% of respondents reported to Talent – a figure that has also decreased from 9.9% in 2016.
- Those reporting to Compensation and Benefits/Reward still account for the largest share, at 45.3%, with HR at 23.3%.
- When asked to which department they thought GM should report, 37.6%

thought it should be Compensation & Benefits, while 26.2% chose HR and 21.8% chose Talent.

Centralisation vs regionalisation, team size and resourcing:

- When asked if they were centrally or locally managed, 38.5% of respondents said they were centrally located, which was down from 42% in 2016.
- There has been a distinct increase in those who are centrally managed but in many locations, from 14% in 2016 to 22.4% this year.
- Central centres of excellence with regional hubs have declined in popularity, from 25% in 2016 to 16.7% in 2017. Meanwhile the figures for decentralised functions have barely altered over the year.
- There has been a clear change in the size of GM teams: in 2016 just over 20% of companies had teams of between one and five people; in 2017 that figure has jumped to more than half (54.7%) of companies.
- There has also been a slight increase in organisations with GM teams of six to 10 people, and those with teams of 11 to 20 staff, but among those with teams of between 21 and 50 people there has been virtually no change.
- The number of respondents who think GM is properly resourced has fallen from 59.2% in 2016 to 51.3% in 2017.
- Meanwhile, those who think it is under-resourced have increased in proportion from 37.7% to 43.5%.

Numbers and types of assignment:

- The headline figure here applies to companies with fewer than 50 assignees, which have increased from 27.1% of respondents in 2016 to 30.2% this year.
- However, the percentage of long-term assignments has not changed from 44%, nor have extended business trips altered in popularity from 16%.
- Short-term assignments have seen a slight increase, from 21% to 23%, while commuter assignments have increased from 12% in 2016 to 18% in 2017.
- Local transfers have similarly risen, from 25% to 29%.



Outsourced services and specialisms

- The proportion of organisations that outsource immigration work is unchanged from 79.4%.
- There has been a slight decline in specialist tax outsourcing (to 81.6% from 87.3% in 2016), which, in the context of increased data sharing and changing regulations, is perhaps surprising. But it may be that the volume and complexity of the issues has led organisations to recruit their own in-house specialists instead.
- Overall, there has been little movement in the number of organisations planning to change provider, albeit the percentage of respondents who intend to change their tax provider has increased, from 9.3% in 2016 to 14% in 2017.
- Other categories with an increase in companies that may change provider are: assignment/vendor management, relocation/destination services and removals and household goods. However, in these cases, plans to change may reflect a corporate policy to review, or cost-cutting measures.

Managing vendor performance:

- The trend seems to be towards an informal approach, with 43% saying they did not conduct a formal survey but tended to rely on assignee and informal feedback – a figure that has increased from 34.1% in 2016.
- Just 26.6% carried out formal surveys and only 3.1% said they benchmarked.

Formal RFPs:

- Clearly, there is little appetite (or time) for changing vendor more often than every three years, with almost every function being reviewed at that point.
- Although the Global Mobility Director is still most involved in such decisions, their participation has fallen from 75.9% in 2016 to 64% in 2017.
- The involvement of Procurement has also decreased, from 64.4% in 2016 to 58.4% this time, while HR's participation has increased from 33.3% in 2016 to its current 44%.

Responding to global change:

In 2016 we asked our respondents if they thought the Brexit result would change the willingness of multinationals to do business in Britain. Opinion was evenly divided, with 35% saying Yes, 30% saying No and 35% saying Don't Know). This time we broadened the question beyond the UK to incorporate the many global changes in politics and economics.

To what extent have changes in the geopolitical landscape affected international moves over the past 12 months?

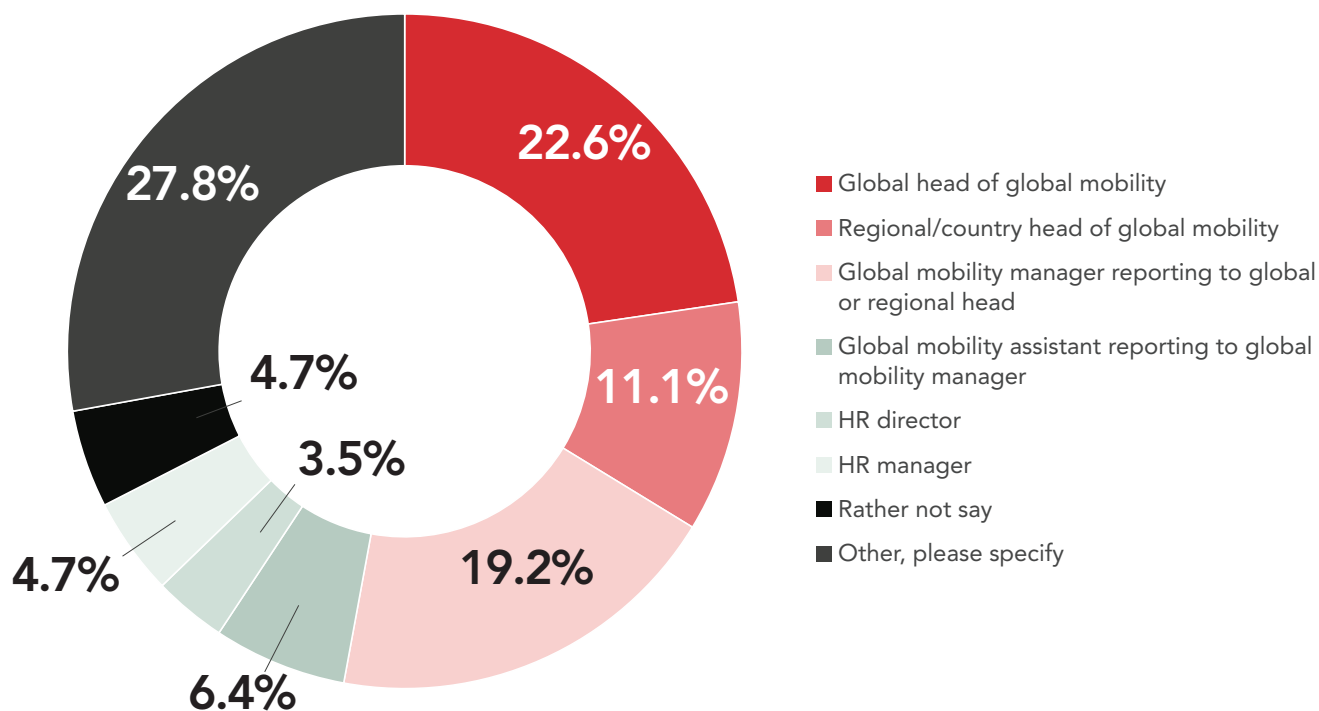
- The answers show clearly that geopolitical changes are having an impact, with 15.3% reporting a great effect and 41.2% reporting an impact 'To some extent'. Overall, therefore, a clear majority (approximately 56%) judged that international moves were being influenced.



PARTICIPANT DEMOGRAPHICS

This section sets out the demographics of the survey population, including job title, headquarters location and industry sector.

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



Compared with the 2016 MGMF survey, this year's research reveals a slight decline in the number of 'Global Heads' of global mobility but a slight increase in the number of 'Regional Heads'.

Of those giving their title as 'Other', the majority identified themselves as consultants or specialists, which mirrors overall employment trends towards

more freelance workers. It may also reflect the continuing emphasis on departments keeping down costs and growth; as full-time roles become less available, consultancy can be a way to maintain professional development and increase expertise.

Further roles specified as 'Other' differ slightly in their titles but report to the

following functions (in relative order): Compensation & Benefits/Reward, Tax, Immigration, Payroll and Finance.

Perhaps the two most striking points arising from responses to this question are that: 1) the dominant roles all include the label 'global mobility'; and 2) HR directors and managers are very much in the minority.

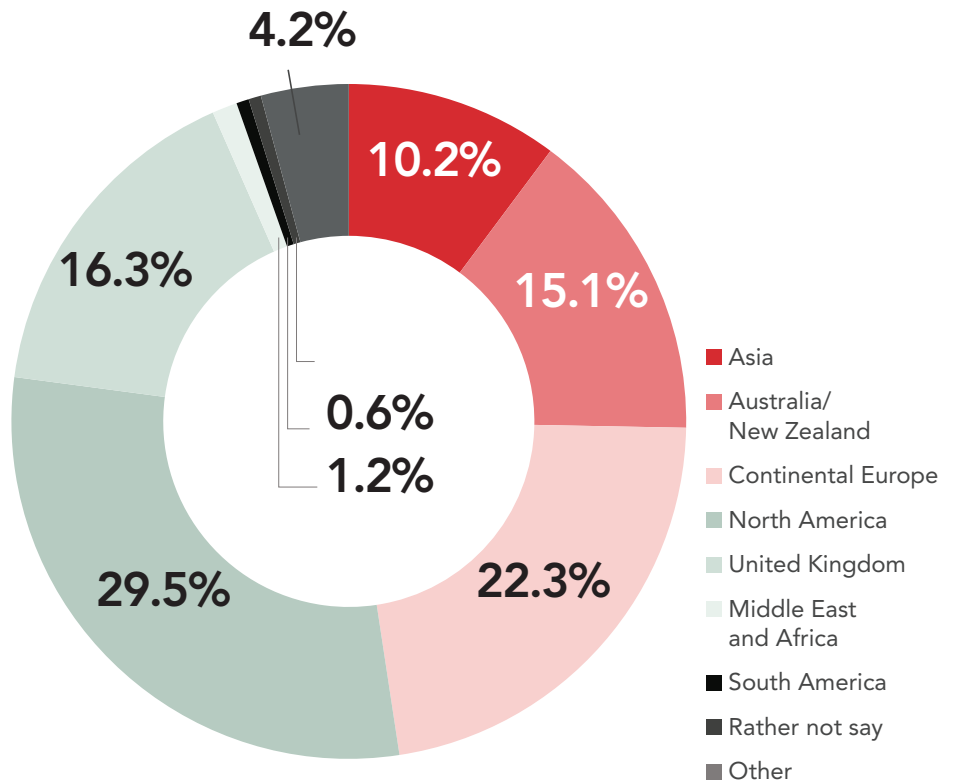
Where is your company headquartered?

Although we are aware that many of the same people respond to our survey year after year, inevitably some participants differ each time.

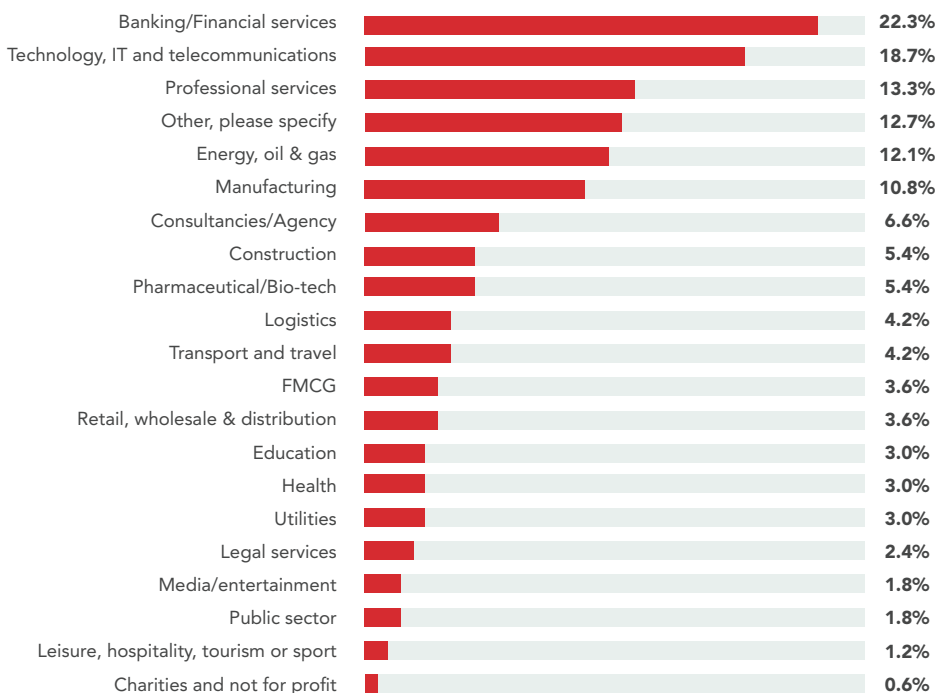
While keeping that qualification in mind, we found significant differences in the answers to this question compared to those in last year's survey.

Most striking is the change in the proportion of participants headquartered in North America: in 2016's survey, almost half (46%) of the companies that responded were headquartered there, but in 2017 the figure has plunged to less than a third (29.5%).

By contrast, the number of companies based in Continental Europe, Australia/New Zealand or Asia has increased in each case.



In which sector(s) does your organisation operate?



Interestingly, certain industries posted fewer responses this year (albeit the same qualification applies as with the previous question). This may reflect circumstances in the global economy, which in turn may influence the numbers or types of assignment.

For example, in this year's survey there were fewer participants from the manufacturing, pharmaceutical/bio-tech, leisure, hospitality and tourism sectors. By contrast, the energy, oil & gas sector, which has been experiencing difficulties, had slightly more participants, rising from 10.5% of the total in 2016 to 12.1% in 2017.

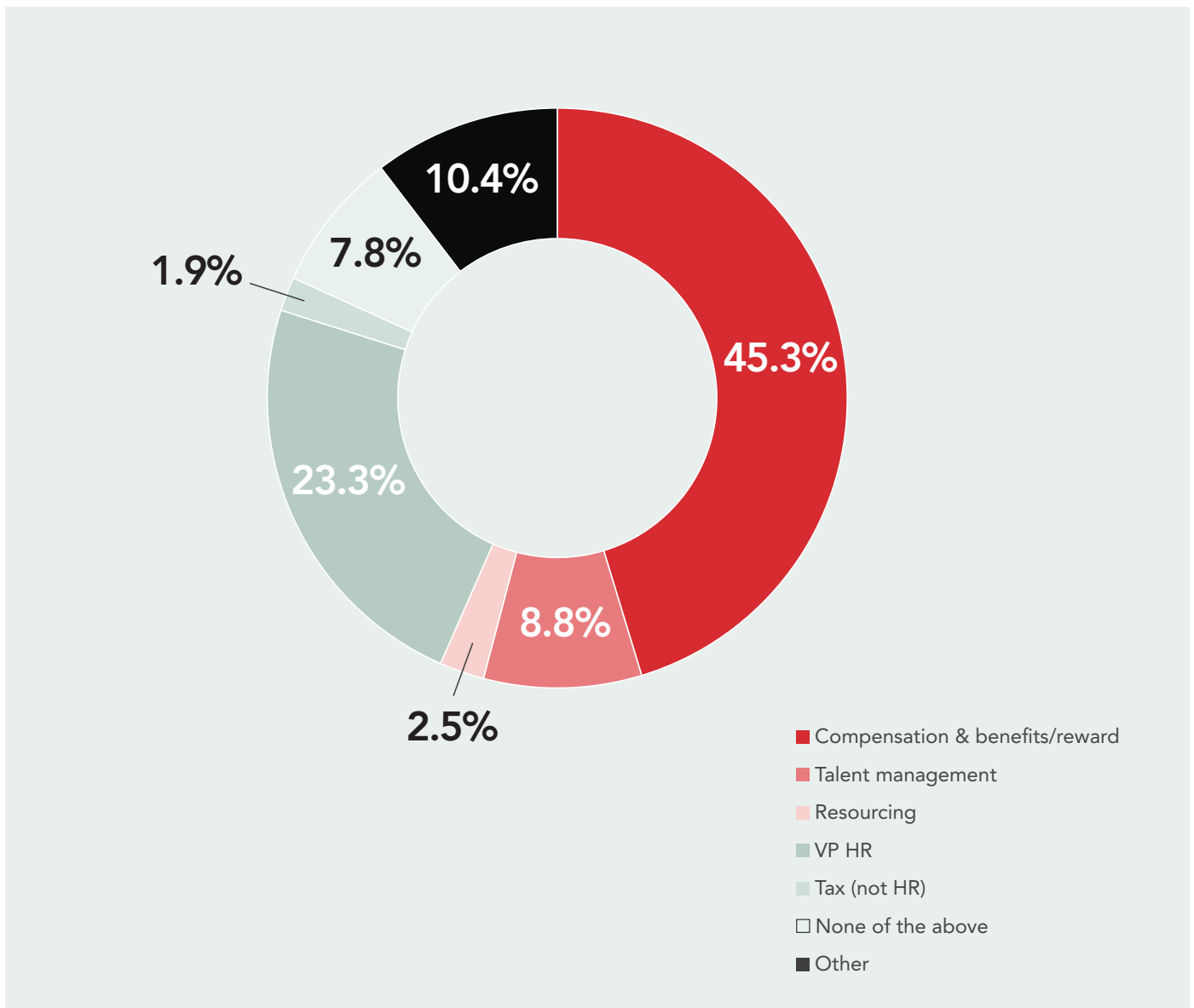
The biggest increase in participation came from the banking and finance sector, which almost doubled from 12% of respondents in 2016 to 22.3% of the total in 2017.

GLOBAL MOBILITY STRUCTURE AND REPORTING

In this section we examine which department the GM team reports to within each organisation, and which department our respondents think it ought to report to.

We also look at how the team is staffed and resourced, the numbers and types of assignment, and how the pattern has changed from 2016.

To which department does your global mobility team report within your overall organisation?



This question yielded surprising responses in that, although GM conferences and summits typically buzz with talk of the vital link between GM and talent management, only 8.8% of respondents said their GM team reported to Talent – with that figure also down from 9.9% in 2016.

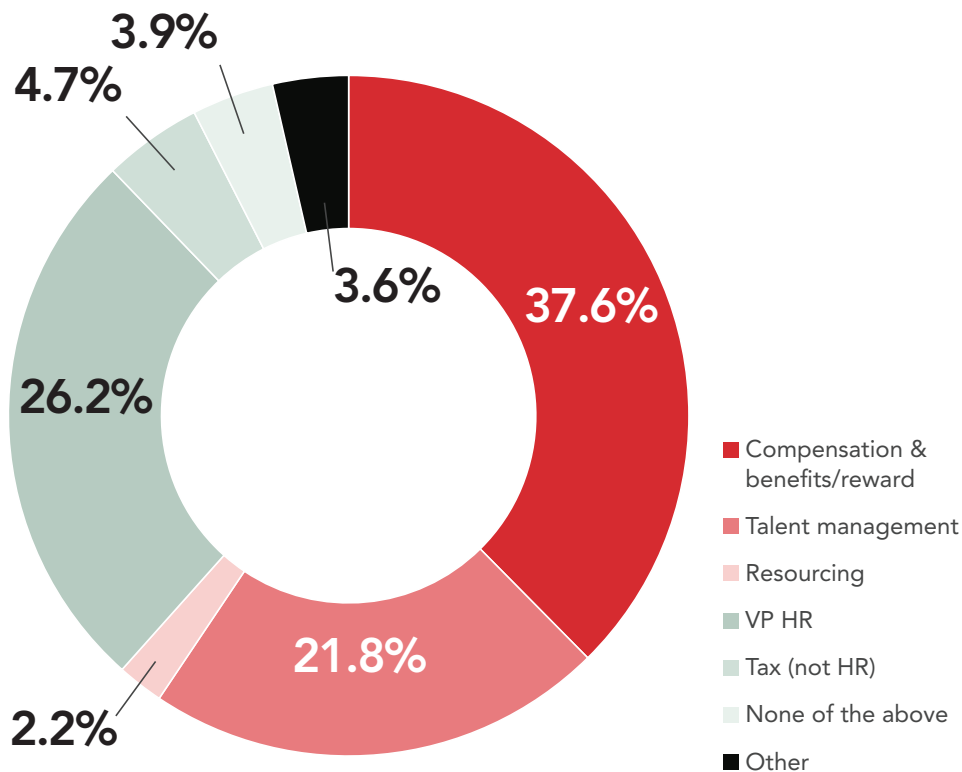
Compensation & Benefits/Reward still accounts for the largest share at 45% but the HR figure should perhaps be higher than shown because many of those who selected 'Other' opted for a variation of the HR function.

Irrespective of the department your global mobility team reports to, which department do you think it should report to?

Last year's survey put Compensation & Benefits/Reward in equal first place with HR, both departments achieving scores of 32.6%.

This year, however, 37.6% of respondents thought their GM team should report to Compensation & Benefits/Reward, with only 26.2% choosing the HR department.

The figure for Talent, meanwhile, echoes the trend in the previous question, with the Talent department's share decreased from 24.8% last year to 21.8% in this year's survey.



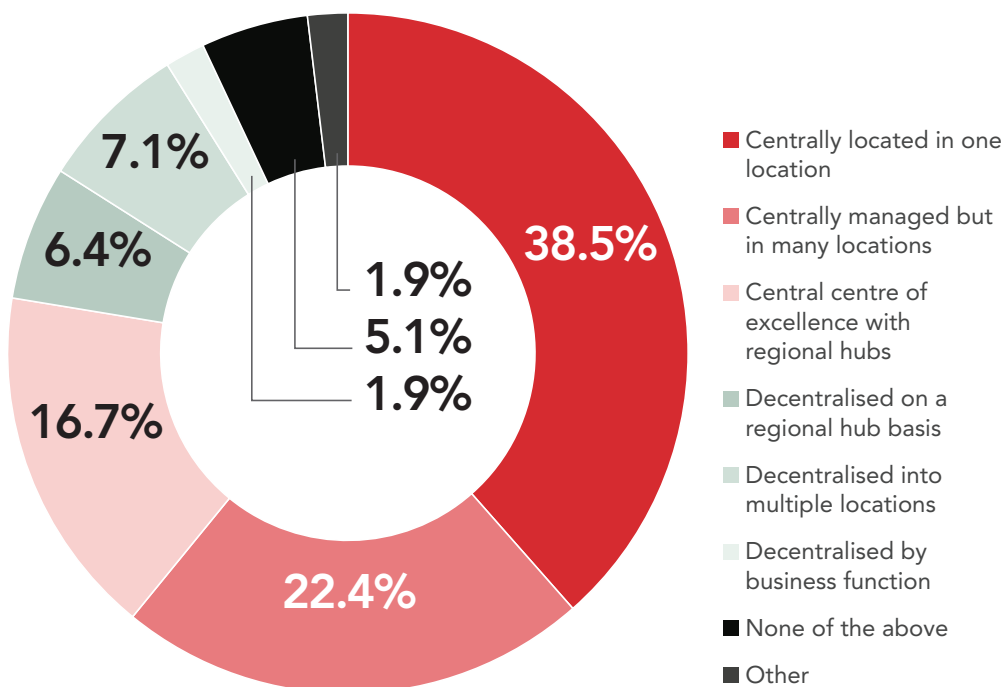
Which of the following statements best describes the structure of your in-house global mobility team?

In 2016, 42% of respondents reported being centrally located in one location, but a year later that figure had fallen slightly to 38.5%.

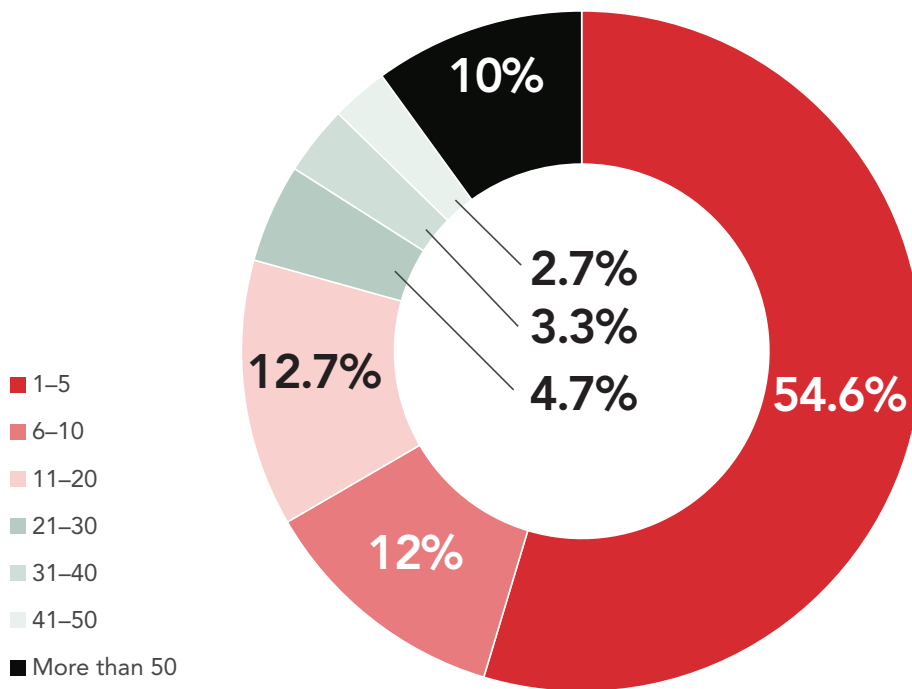
In contrast, there has been a significant increase in the number of centrally managed respondents in many locations, up from 14% in 2016 to 22.4% in 2017.

Meanwhile, central centres of excellence with regional hubs have declined sharply, from 25% in 2016 to 16.7% in this year's survey.

However, the figures for decentralised functions have barely altered during the year.



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



This year’s research reveals a striking change in the size of GM teams.

In 2016, just over 20% of companies in our survey reported having a very small GM team, of between one and five full-time staff. In stark contrast, this year’s data shows more than half (54.6%) of companies with teams of that size. So, far from expanding their GM team, most companies taking part seem to have either shrunk their team or set up a small one.

However, for GM teams of six to 10 and 11 to 20 full-time staff, the data shows an increase from 6% in 2016 to 12% in 2017, while the figures for GM teams of 21 to 50 full-time staff are virtually unchanged.

Do you think your global mobility function is properly resourced?



Although half (51.3%) of respondents to this year’s survey deemed their GM function sufficiently resourced, that number is down from 59.2% last year, suggesting less satisfaction with resources overall.

This is borne out by the increase in respondents who considered their GM function to be under-resourced, with the

percentage rising from 37.7% in our 2016 survey to 43.5% this year.

Interestingly, however, there has also been a slight increase in those who thought their GM function was over-resourced, from 3.1% last year to 5.2% this time.

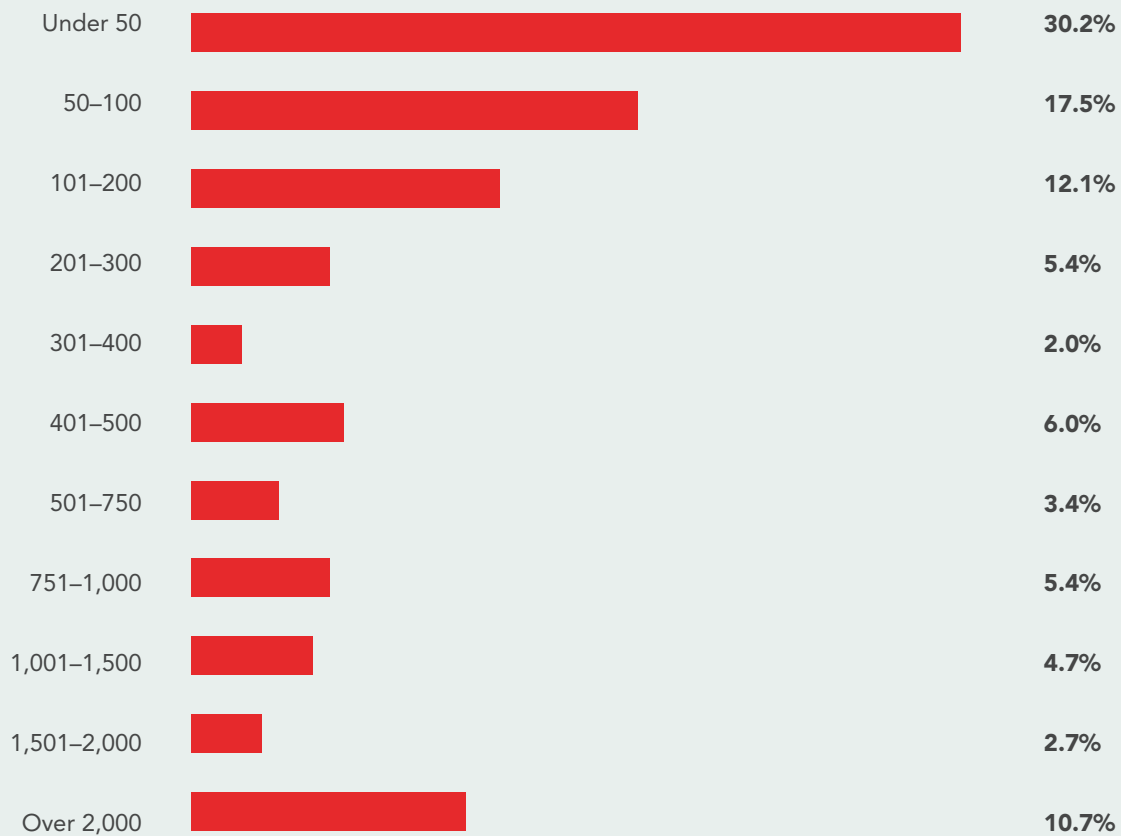
How many assignees does your organisation have worldwide?

Among organisations with more than 100 assignees there is a general downward trend, with numbers falling by between 2% and 6% since our 2016 survey.

However, the headline statistic relates to organisations with

fewer than 50 assignees, which have increased from 27.1% of the total in 2016 to 30.2% of respondents this year.

This increase perhaps reflects the continuing squeeze on investment in business.



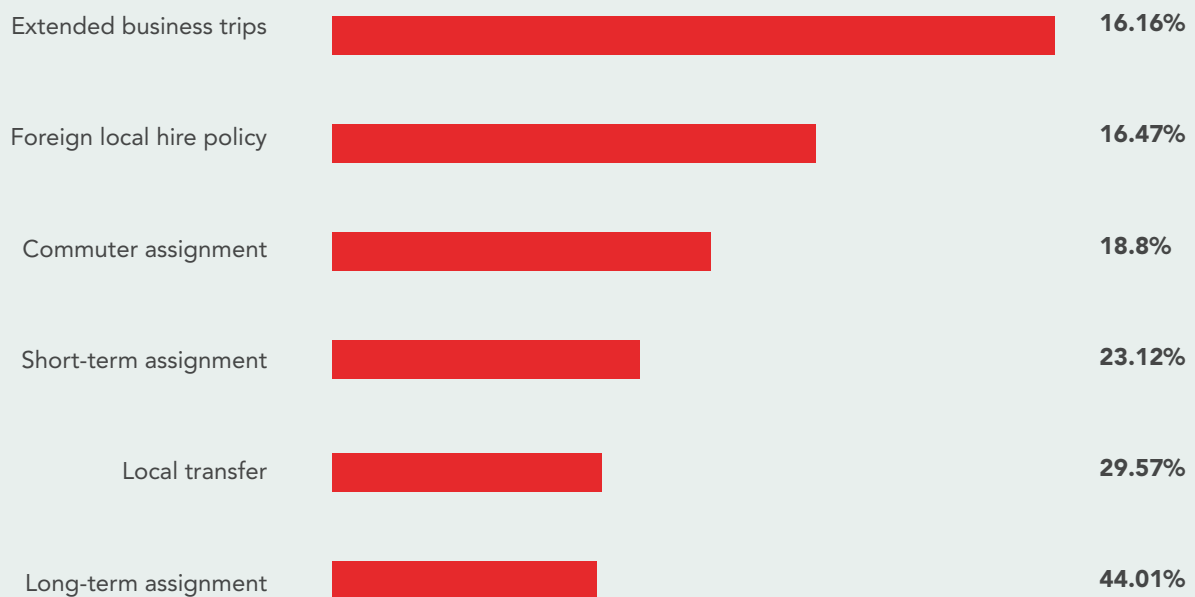
What percentages of your assignees fit the following types of assignment?

There has been no change in the percentage of long-term assignments (44%) reported by our respondents, nor in the percentage for extended business trips.

However, short-term assignments have increased slightly since

2016, from 21% to 23%, as have local transfers, rising from 25% to 29%.

Meanwhile, commuter assignments have experienced a bigger rise, from 12% in 2016 to 18% in 2017.



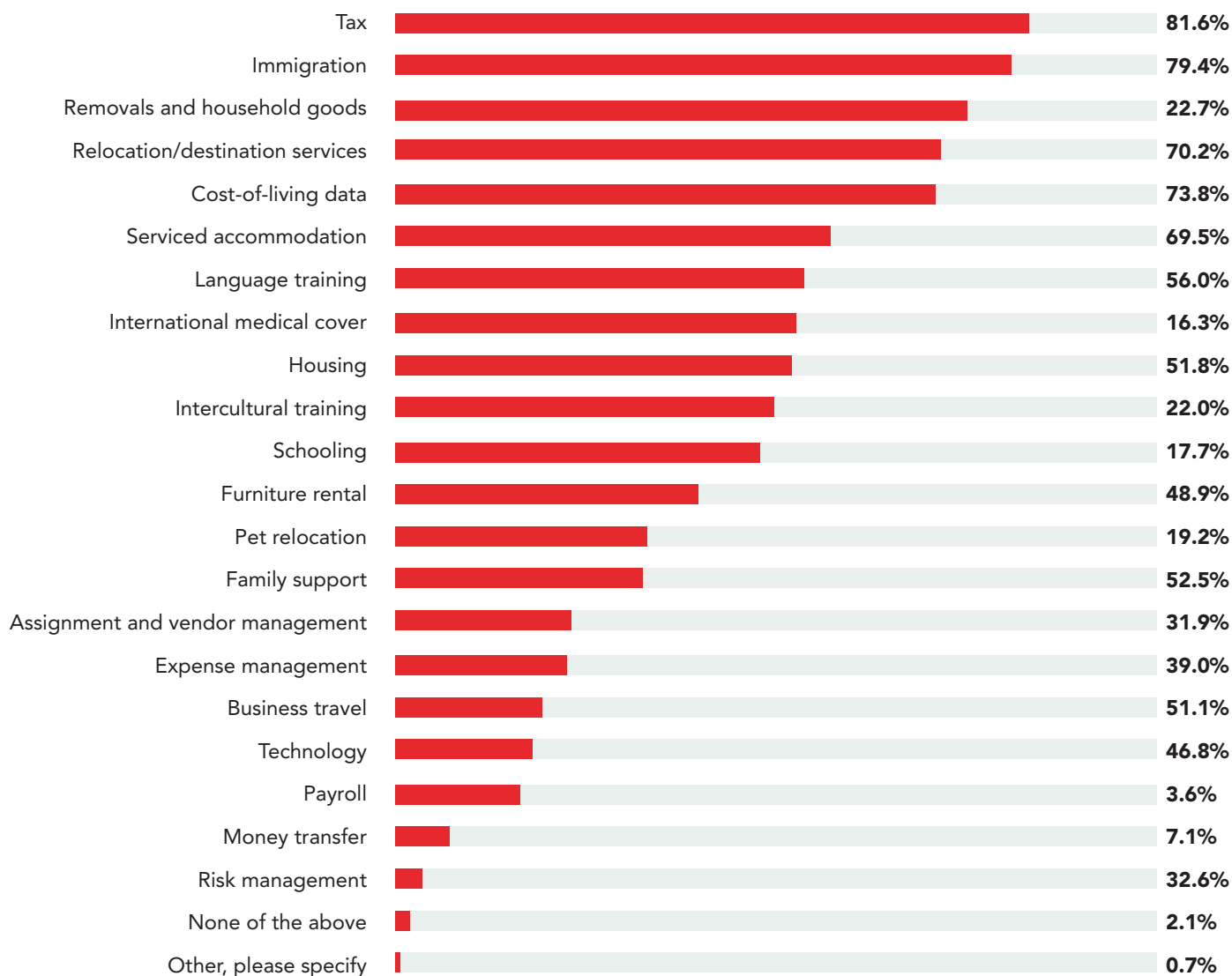
OUTSOURCED SERVICES AND SPECIALISMS



Organisations are increasingly looking to outsource services – particularly with the aim of achieving cost savings.

This may also enable in-house professionals to focus on more strategic matters and on management of the function.

Which of the following services are predominantly outsourced to a specialist third party?

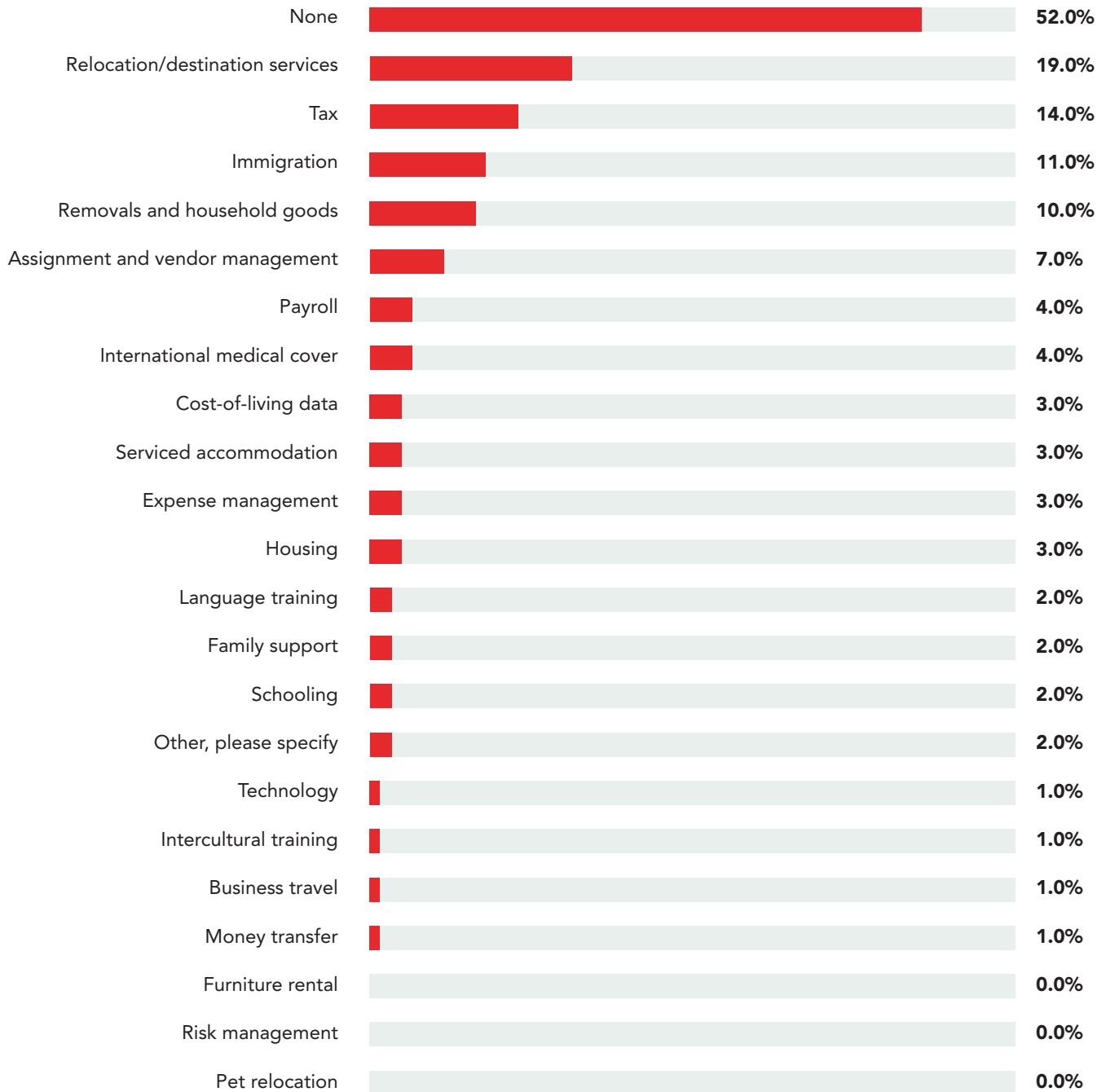


Surprisingly, respondents’ answers to this question differ little from those given in 2016. Notably, the figure for organisations that outsource immigration work is identical to last year’s, at 79%.

In the context of increased data sharing and changes to regulation, this trend is unexpected – as is the slight decrease in specialist tax outsourcing, from 87.3% in 2016 to 81.6% in this year’s survey.

However, the volume and complexity of these issues may have prompted organisations to recruit in-house specialists instead.

Do you plan to change any of the following providers over the next 12 months?



Again, this set of answers reveals little movement since last year, although the percentage of respondents who planned to change their tax provider has increased from 9.3% to 14% in this year's survey.

Other provider categories that show a small increase from last year are: assignment and vendor management, relocation/

destination services and removals and household goods.

However, plans to change these particular providers may reflect either a corporate policy to review or cost-cutting measures, rather than simply the organisation's dissatisfaction with the service provided.

How do you manage vendor performance?



Interestingly, the trend here seems to be towards an informal approach.

Nearly half (43%) of respondents said they did not conduct a formal survey to manage vendor performance but tended to rely on assignee and informal feedback. This was an increase from 34.1% in 2016.

Use of formal surveys has decreased slightly, from 29.7% last year to 26.6% in 2017.

Meanwhile, it is striking that so few organisations use benchmarking, cited by just 3.1% of respondents.

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

	Every two years	Every three years	Every four years	Every five years	Five years +
Tax	12.5%	34.1%	6.8%	17.0%	29.5%
Immigration	15.7%	32.5%	7.2%	15.7%	28.9%
Assignment and vendor management	8.7%	39.1%	8.7%	13.0%	30.4%
Relocation/destination services	24.3%	41.9%	5.4%	9.5%	18.9%
Schooling	22.2%	36.1%	11.1%	5.6%	25.0%
Cost-of-living data	20.6%	17.5%	7.9%	11.1%	42.9%
Risk management	0.0%	50.0%	50.0%	0.0%	0.0%
Payroll	25.0%	12.5%	6.3%	18.8%	37.5%
International medical cover	24.4%	31.1%	8.9%	4.4%	31.1%
Expense management	0.0%	35.3%	5.9%	5.9%	52.9%
Business travel	20.0%	33.3%	6.7%	6.7%	33.3%
Family support	19.2%	53.8%	0.0%	7.7%	19.2%
Furniture rentals	20.0%	36.7%	10.0%	6.7%	26.7%
Housing	31.0%	38.1%	4.8%	4.8%	21.4%
Money transfer	0.0%	0.0%	33.3%	0.0%	66.7%
Intercultural training	21.4%	42.9%	2.4%	11.9%	21.4%
Pet relocation	28.0%	48.0%	12.0%	0.0%	12.0%
Language training	15.9%	40.9%	6.8%	9.1%	27.3%

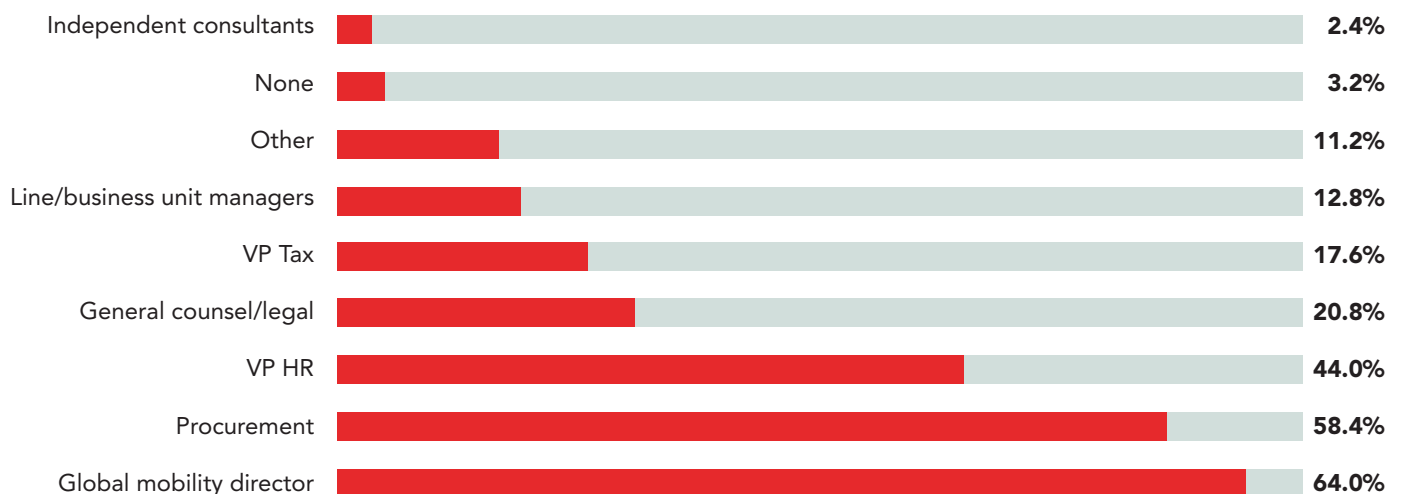
Clearly, there is little appetite – or time – to change vendors more often than every three years, with almost every function being reviewed at that point by this year's respondents.

Although the Global Mobility Director continues to have the most involvement in such decisions, their participation has decreased since last year, from 75.9% to 64%. The involvement

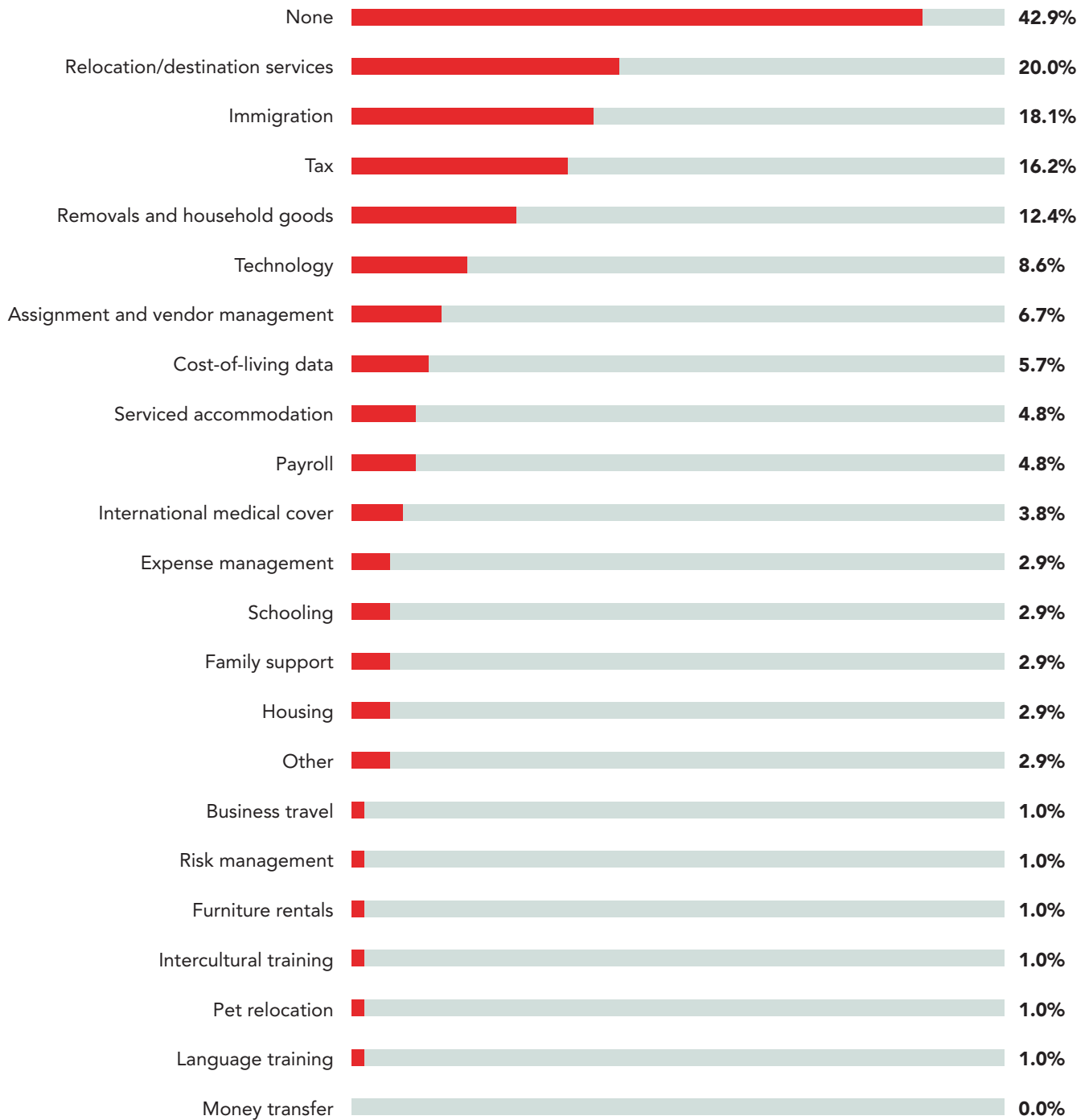
of Procurement has also declined, from 64.4% to 58.4%.

However, HR's participation in the RFP process has increased significantly, rising from exactly a third (33.3%) of respondents in 2016 to almost half (44%) this year. This is perhaps due to functions being concentrated in a generalist department owing to straitened economic times

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



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



Although there has been little change from last year's results, fewer respondents said they were planning an RFP for tax (16%, compared to 18% last year).

In contrast, more respondents said they were considering an

RFP for immigration, with the percentage increasing from 14.1% in 2016 to 18.1% in 2017.

The biggest increase is in the relocation/destination services category, which has risen from 12.8% to 20%.

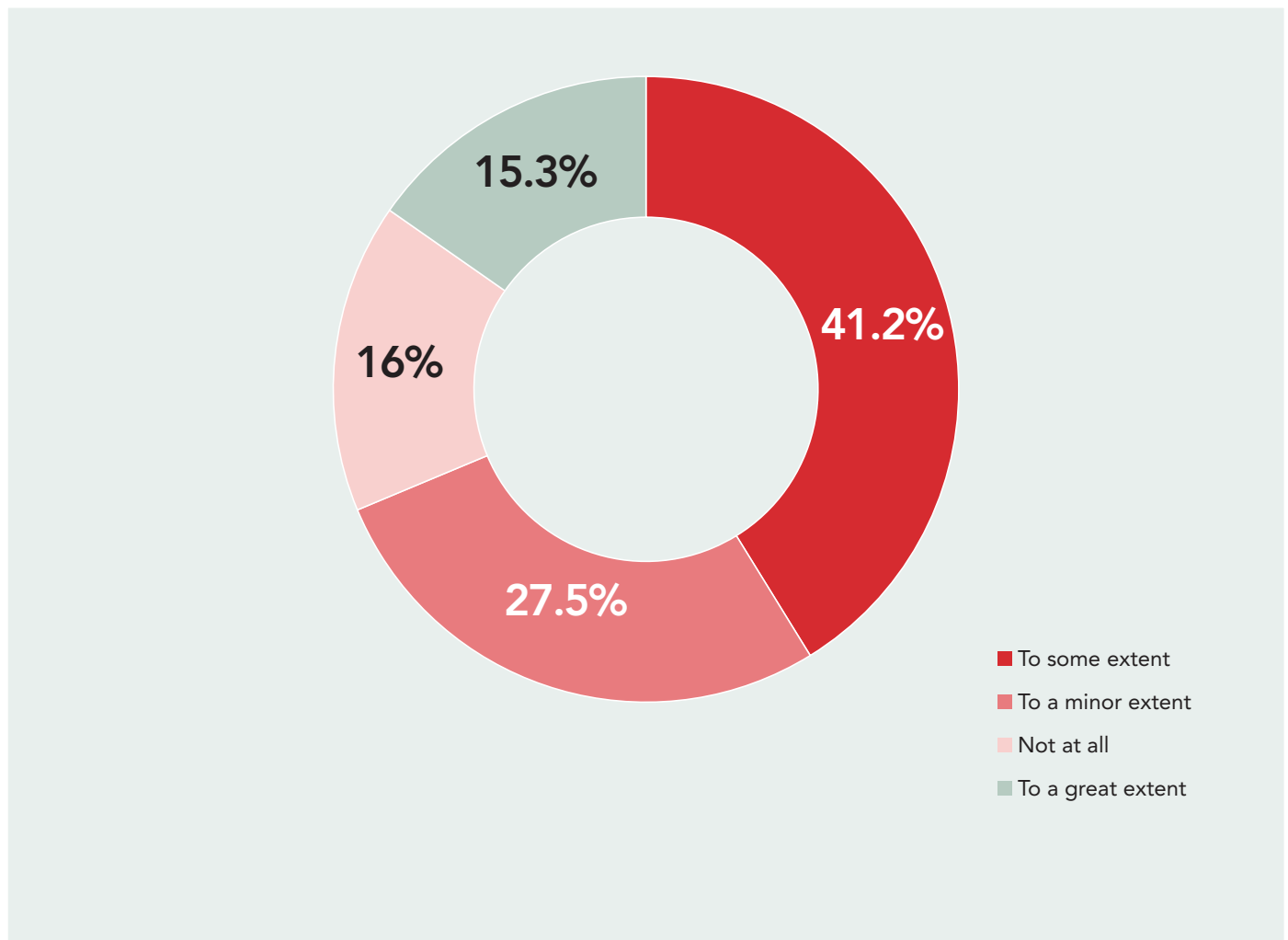
RESPONDING TO GLOBAL CHANGE



In 2016 we asked our respondents if they thought Brexit would affect the willingness of multinationals to do business in Britain (35% said Yes, 30% said No and 35% replied Don't Know).

This year we've extended the question beyond British affairs, in order to incorporate the many political and economic changes that have occurred globally since last year's survey.

To what extent have changes in the geopolitical landscape affected international moves over the past 12 months?



The answers to this question clearly show that geopolitical changes have had an impact on respondents.

In response to the statement 'To a great extent', the percentage of total replies was 15.3%, while the statement 'To some extent' received the biggest response, at 41.2% of the total.

Therefore, more than half (56.5%) of our respondents judged that international moves were being influenced by geopolitical change.

CONCLUSION

While a few countries are seeing something of a boom in their fortunes, many areas of the world are experiencing economic challenges and political instability – factors that inevitably impact upon both business confidence and operations.

The fortunes of various industries and sectors also wax and wane, so it is impossible to recreate the same conditions for this survey every year. Nevertheless, while keeping in mind qualifying factors such as this, we can use the results to make some broad comparisons – and draw some conclusions from what we see.

Among respondents whose job title didn't readily fit the traditional types, there was a marked increase in those who, although working on the corporate side of global mobility, defined themselves as either Consultant or Specialist. This would seem to mirror the overall shift across all sectors towards self-employment, but it is important to remember that this may be as much about corporate cost-cutting as about entrepreneurship or choosing to work as a contractor.

Among the more traditional roles, the decline in the number of Global Heads of Global Mobility, alongside an increase in the number who identified themselves as Regional Head, is particularly interesting and may point to an increasing trend towards decentralisation – which seems borne out by the shifts in company headquartering – away from the

traditional hotspots of the USA and the UK and instead more evenly spread across Continental Europe, Australasia and Asia. Perhaps the most striking point about the majority of job titles given in our respondents' answers is that most of them include the label 'global mobility' – surely a clear sign that, as a distinct discipline, GM has achieved a certain level of maturity within business.

Although there was little significant change in respondents' views on the department to which GM should report, there was a definite increase in the number of those who thought that GM was under-resourced. GM teams too, according to these results, appear to be remaining small or even shrinking, with an increase in those that are centrally managed but regionally located.

The number of assignees being managed by GM professionals has also dropped in the past year and, although the percentage of long-term assignments has not decreased significantly, there are more short-term and 'commuter' assignments being managed.

The answers on outsourcing and vendor management revealed a surprisingly small appetite for change. There was little difference in the percentage of organisations that planned to outsource further – or to review their provider more often than every three years. Taken with the fact that almost half of respondents said they did not carry out formal surveys on vendor performance

but relied instead on assignee and informal feedback, this suggests a positive level of satisfaction with vendor performance.

Finally, following 2016's question about the potential impact of Brexit, we broadened this year's topic to ask respondents to what extent they thought geopolitical changes had affected international moves in the past 12 months. A clear majority thought there had been a definite impact (with 15% saying 'To a great extent').

The world is constantly changing, of course, but the overall results of this year's survey, along with our *Policy in Practice Report – Risk Management and Compliance in an Uncertain World* – published earlier in 2017, suggest a commonly held perception that business is operating in a more unpredictable environment.

There's little that any of us can do to immediately change this situation. But at FEM we can at least bring together GM professionals to pool their knowledge and experience – whether face to face at our global and local events, online via our website and social media, or, of course, through reports such as this one, which can provide a useful way to 'take the temperature' of the industry as a whole.

Once again, FEM is grateful to all those who took part in our survey.

Forum for Expatriate Management
September 2017

APPENDIX A

SURVEY PARTICIPANTS

ABB		MFS Investment Management	Wipro
Accenture		Michael Page	Woodside Energy
Advent International Corp		Micron Technology Inc	Woolworths
AIA Company Limited		Monadelphous Group Limited	
AIRINC		MTU Aero Engines	Yazaki North America
Akamai Technologies		Münchener Rückversicherung AG	
Aktis Strategy			
Allianz		NES Global Talent	
Amec Foster Wheeler		Novartis	
American Bureau of Shipping		NTT DATA Services	
American Express			
ANZ		Oceaneering	
ANZ Banking Group Ltd		Onefinestay	
Ardagh			
Arthur J Gallagher & Company		Pearson	
Arup		Pfizer	
Aspen Insurance		Pinsent Masons LLP	
AT Kearney		Pon Holdings BV	
Atkins		Publicis Communications	
Atos		Pullmantur	
Australian Embassy – Defence			
AustralianSuper		QBE Insurance Group Ltd	
Avaloq Evolution AG			
Aviva		REHAU AG + Co	
		Rolls-Royce Plc	
BAE Systems Inc		RWE Generation	
BAI Communications			
Banco Bradesco SA		Sabre	
Bank of China Brazil		Saint-Gobain	
Bayer		Santa Fe	
Beam Suntory		SAP	
BHP Billiton		Savills	
Booking.com		Sembcorp Marine Ltd	
BorgWarner Inc		Shield GEO	
BP		Shire	
Burckhardt Compression AG		Sika AG	
		Skyscanner	
Cabot Corporation		Software AG	
Cardno		Sulzer Management AG	
Cerberus		Swisscom Ltd	
CGI			
Chanel		Takeda Pharmaceuticals USA, Inc	
Chatham Financial		TDWilliamson sprl	
Chubb		Technip	
Cigna		Tesco	
Cisco International Limited		The Capital Group Companies Inc	
CNA Financial		Toyota Motor North America	
Coca-Cola European Partners		TTK Services Private Limited	
Computacenter			
Comscore		UniGroup Worldwide Moving –	
Continental Automotive		Hong Kong	
Crown World Mobility		University of Pennsylvania	
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APPENDIX B

SURVEY SPONSORS

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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 its strong global presence allow Fragomen to provide clients with high-quality, innovative, sustainable and cost-effective worldwide immigration services. Fragomen represents a broad range of companies, organizations, emerging businesses and individuals 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 24 countries across every region of the world. Today, it has over 3,450 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, worldwide standards and knowledge and best practices. The firm also utilizes a proprietary case management and reporting tool to enable case processing efficiencies and management information reporting, and remains at the cutting edge of information sourcing and delivery techniques.

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