MANAGING THE GLOBAL MOBILITY FUNCTION

A benchmark study 2015

FORUM FOR EXPATRIATE MANAGEMENT

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INTRODUCTION

Brian Friedman
Founder
The Forum for Expatriate Management

Welcome to the Forum for Expatriate Management's (FEM) sixth annual Managing the Global Mobility Function survey. The survey explores the most pertinent questions asked by heads of global mobility worldwide looking to establish and maintain their teams according to best practice. We had 245 respondents, of which well over two thirds were either global mobility managers or global or regional heads of global mobility.

FEM members continue to tell us there is a drive for global mobility to take a more strategic role to help expanding businesses to manage the right talent into the right locations.

Global mobility continues to flourish. Many global mobility functions are expecting an increase in the number of assignment initiations in the next 12 months and are looking to resource this accordingly, either internally or by increasing the number of outsourced services.

The trend for global mobility teams to report into talent management functions also seems to be continuing, although the most common reporting line still remains compensation and benefits.

We are delighted we have had such a great response to this survey once again and thank you to all those who participated. A full list of participating organizations and 'name-checked' service providers are included in the appendices.

FEM's mission has always been simple: to establish an online and real world community for all global mobility professionals and to provide the best possible alternatives and solutions for the global mobility challenges they are faced with.

September 2015

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EXECUTIVE SUMMARY

We had 245 respondents to the survey and have produced data based on program size, sector and other relevant criteria.

31% of respondents in our survey were global heads of mobility, 12% of respondents were regional or country heads of global mobility and 25% were global mobility managers. The key findings of our survey are as follows:

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

• One half of global mobility functions in this survey reported to compensation and benefits/reward, and 26% reported directly to VP human resources.
• Once again there was an increase in those global mobility functions reporting to talent management, now 9%.
• 35% of respondents felt the global mobility function should report to compensation and benefits/reward, 29% wanted to report directly to VP human resources, 18% opted for talent management and 14% chose a combination of reporting lines.
• There was a continued increase in the number of large programs choosing to report to talent management (7% in 2013, 14% in 2014 and 20% in 2015).
• 39% of global mobility functions were centrally located in one location. 26% of respondents had a central center of excellence with regional hubs and 19% of teams were centrally managed in many locations.

How many assignment initiations have there been in the past 12 months?

• There was an increase in the proportion of respondents that had initiated over 500 new assignments in the past 12 months (up from 4% last year to 14% this year) and a reduction in the number that initiated 1-25 new assignments in the past 12 months (down from 44% last year to 37%).
• There was no overall trend in terms of an increase or decrease in assignee initiations. There was a slight reduction in all categories between 101 and 500 assignee initiations and a slight overall increase in those that were initiating between 25 and 100 assignees.

How will global mobility team sizes change?

20% aimed to increase their team in the next 12 months, 11% to reduce it and 69% expected it to stay the same.

Are global mobility functions resourced correctly?

44% felt their global mobility function was under-resourced, 53% felt they were resourced correctly, and 3% felt they were over-resourced.

What services are outsourced?

• The top three outsourced services were tax (outsourced by 86% of the survey respondents), immigration and relocation/destination services (both outsourced by 81% of respondents).
• 17% of respondents were looking to change their tax and relocation/destination services providers in the next 12 months.

What is an appropriate assignee caseload ratio?

The assignee caseload ratio gives us an insight into the appropriate ratio of assignees per global mobility professional. The findings from this survey demonstrate the following:
• For small programs (up to 100 assignees) the median caseload ratio was 19 assignees per head.
• For medium-sized programs (100 to 1,000 assignees) the median caseload ratio was 35 assignees per head.
• For large programs (over 1,000 assignees) the median caseload ratio was approximately 113 assignees per head.

How much is the average cost per assignee in terms of the main service areas?

The average cost per assignee in the following service areas was: $9,110 for tax; $2,681 for immigration; $7,028 for relocation/destination services; $6,251 for removal/household goods; $3,563 for international medical cover; $6,054 for serviced accommodation; and $569 for cost of living data. There was insufficient data to produce cost information on assignment and vendor management, payroll and expense management.


Opportunity is everywhere. So are we.
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How much do the most commonly used services cost?

Summary	Lower quartile	Median	Upper quartile
US tax return	USD 1,200	USD 1,500	USD 1,813
Cost projection	USD 463	USD 525	USD 675
Entry/exit meeting	USD 388	USD 475	USD 703
Tax equalisation calculation	USD 400	USD 463	USD 500
UK tax return	GBP 500	GBP 1,000	GBP 1,035
Setup fee for relocation management service provider	USD 463	USD 800	USD 1,350
Monthly fee for relocation management service provider	USD 131	USD 235	USD 360
Repatriation fee for relocation management service provider	USD 550	USD 900	USD 1,000
Cost of shipping a 20ft container between Europe and the US	USD 7,000	USD 12,000	USD 14,750
Standard US visa	USD 5,125	USD 2,500	USD 1,150
Typical home search in a major city	USD 500	USD 1,500	USD 1,800

How do firms monitor their vendor performance?

The biggest proportion (37%) of respondents said they relied on assignee 'noise' and informal feedback. However, this proportion has continued to reduce and there was an increase in those conducting their own formal internal survey of assignee satisfaction (29%). A further 30% used their vendor to carry out the survey.

How often do organizations go out to RFP?

In some service areas – tax, assignment and vendor management, relocation/destination services, removals and household goods and expense management – the highest proportion of respondents went out to RFP every three years.

Other services – including cost of living data, immigration, international medical cover, payroll and technology – were more likely to go out to RFP less frequently than every five years. In general every three years, every five years and more than five years were the most common.

Vendor performance ratings

Firms were rated in terms of whether they provided good value for money, service quality and levels of technical competence and professionalism.

Overall the services received reasonable levels of client satisfaction. Once again, respondents were most likely to strongly recommend their immigration provider to a friend in another organization (56%).

There was a significant improvement for international medical cover providers, with 49% of respondents saying they would strongly recommend them in comparison to 17% last year. Overall results suggest that the vendors' approach to their clients and business in general was competent and professional.

An insight in the current market

For the purpose of this study, market share of nine principal sectors was analyzed and assessed.

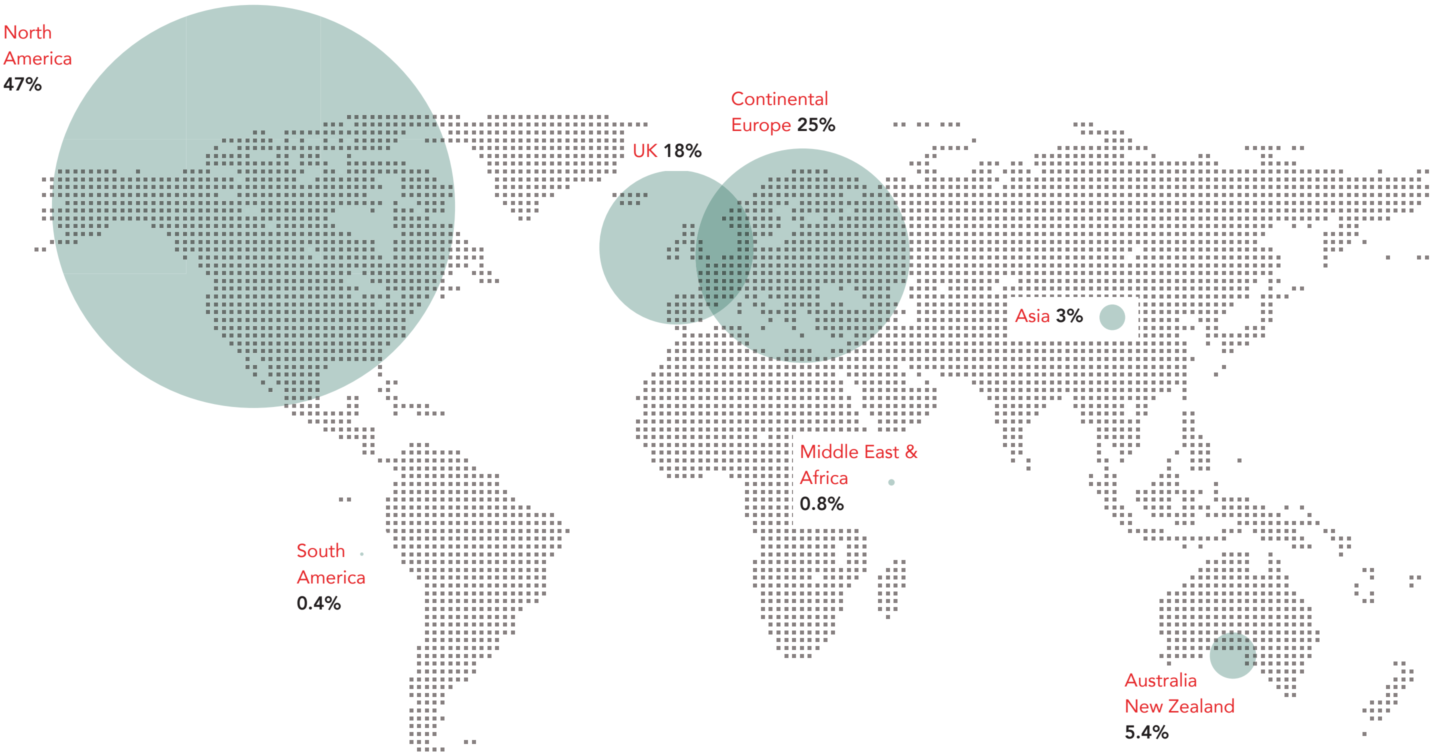
When reviewing market share it is important to be aware that results purely reflect the information provided and will be within statistical margins of error.

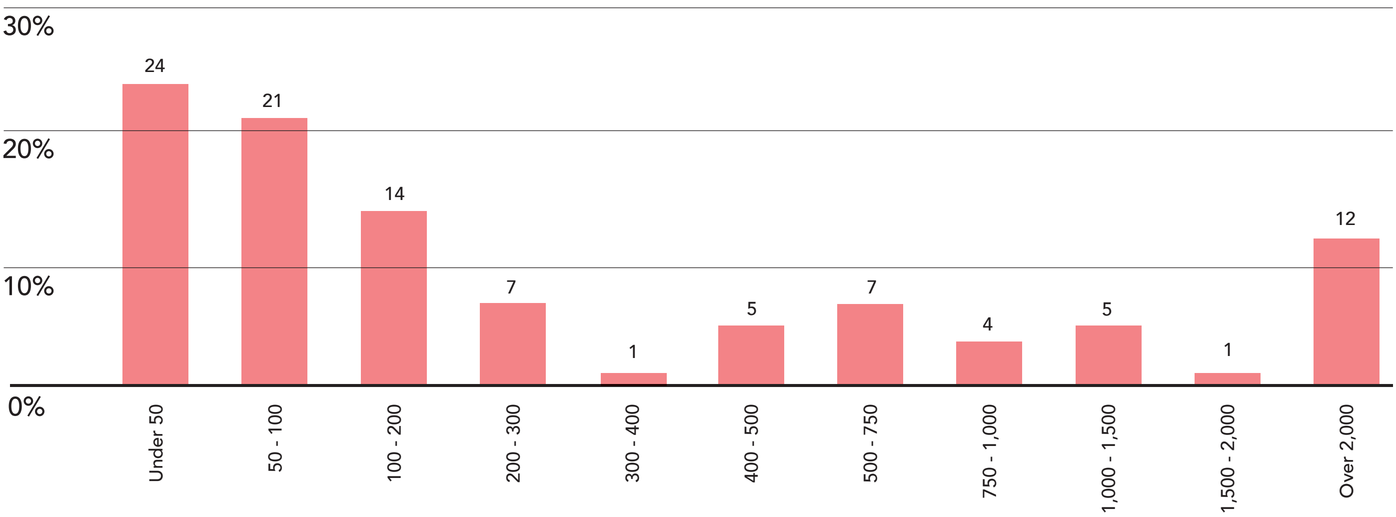
Market share is illustrated as a percentage of respondents who outsource that particular service.

- The Big Four continue to dominate the market for tax services although for the first time we have seen evidence that EY (25%) and Deloitte (24%) have both overtaken PwC (21%).
- Fragomen remains dominant and has the leading market share for immigration (46%).
- Cartus remains at the top with the greatest share of the assignment and vendor management market (23%).
- Cartus has the greatest share of the relocation/destination services market (15%) followed closely by Santa Fe then SIRVA and Crown World Mobility.
- Santa Fe is the dominant provider in the removals/household goods market (15%), followed by the SIRVA and Cartus networks.
- Mercer has over half of market share when it comes to cost of living data provider (60%).
- Oakwood Worldwide had the greatest market share for serviced accommodation (18.9%).
- CIGNA has the largest market share for international medical cover (43.5%).
- Cartus has the highest market share for expense management at 16%, followed closely by SIRVA at 15%.
- Analysis was not undertaken on market share for payroll and technology due to the small sample sizes.

PARTICIPANT DEMOGRAPHICS

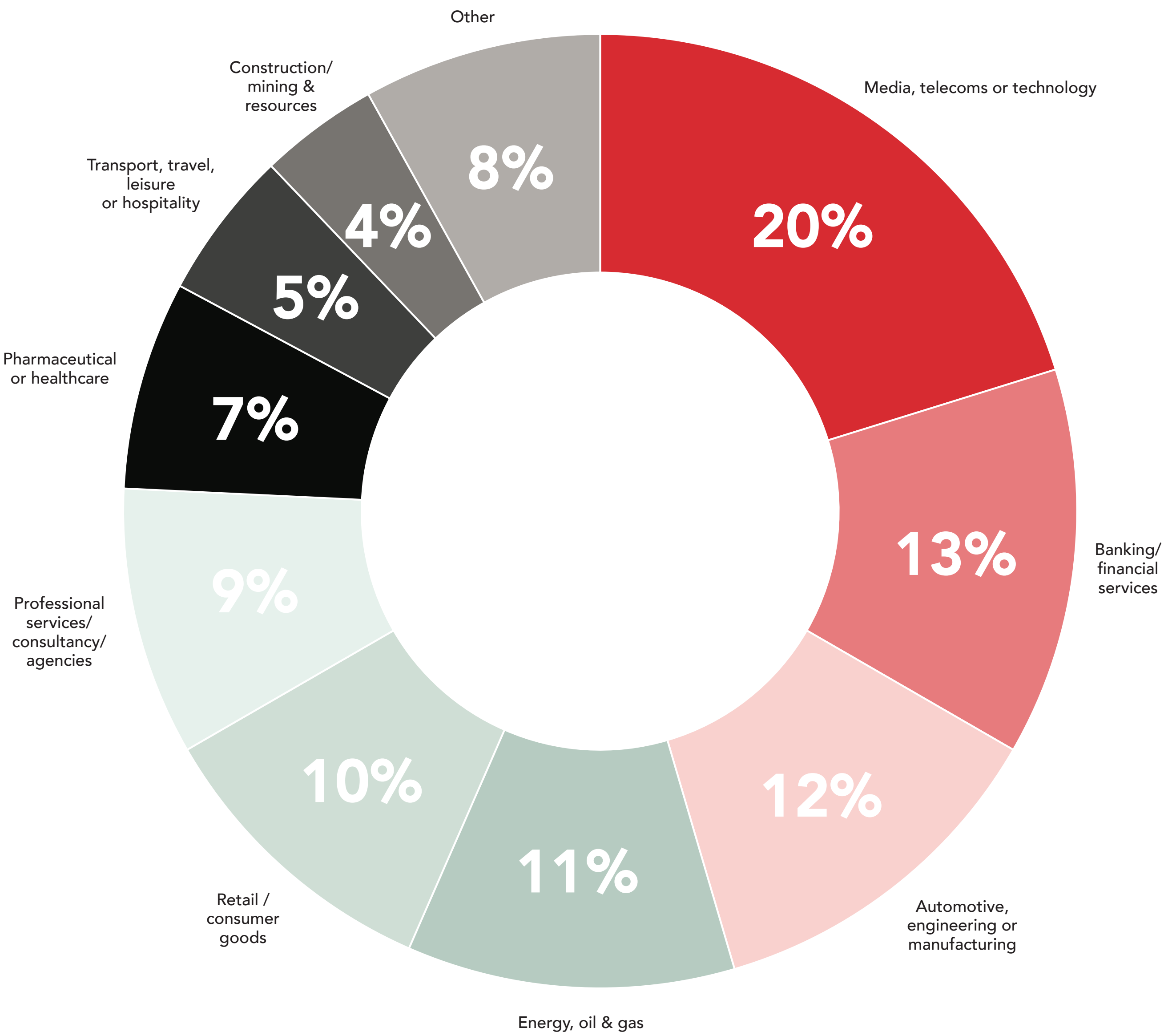
Breakdown of survey participants by headquarter location

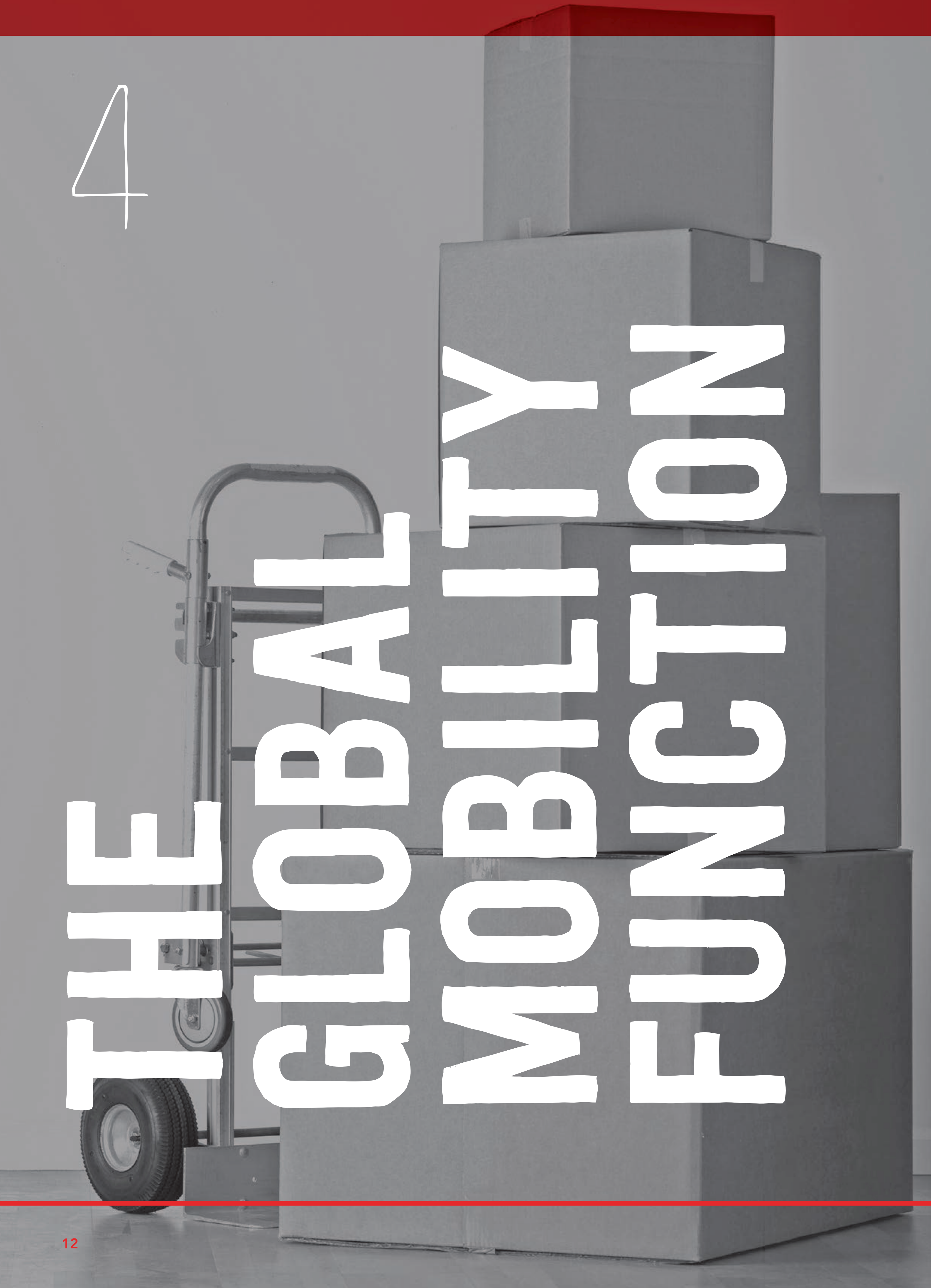




Number of assignees

Breakdown by industry sector





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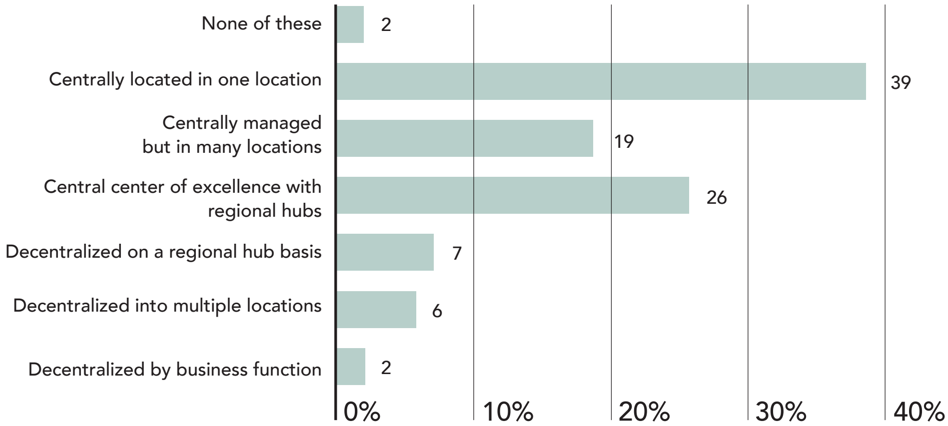
THE GLOBAL MOBILITY FUNCTION

This section explores the global mobility function and gives a deeper insight into the structure of global mobility teams. The study investigated whether organizations were located centrally in one place or decentralized on a regional hub basis or in multiple locations. We also asked our respondents where they currently report as well as where they think their global mobility team should report.

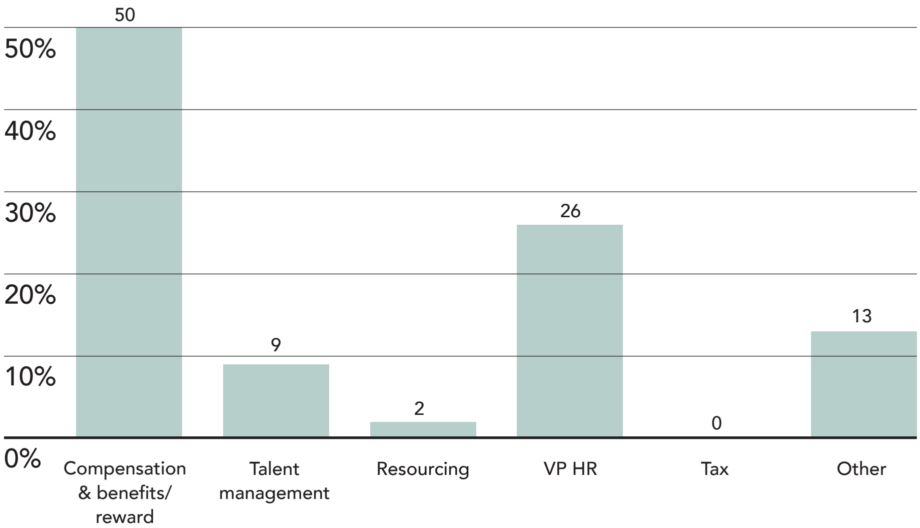
How global mobility teams are structured



The structure of global mobility teams was similar to the 2014 study. There was an increase in the number of organizations whose global mobility team was centrally managed but in many locations (19% this year compared to 14% in 2014) and those decentralized by business function (2% this year compared to 1% in 2014).

The remaining categories were slightly reduced. Organizations centrally located in one location reduced to 39% this year from 43% in 2014. Those with a central center of excellence with regional hubs reduced to 26% this year from 29% in 2014. Organizations decentralized on a regional hub basis reduced to 7% from 8%.

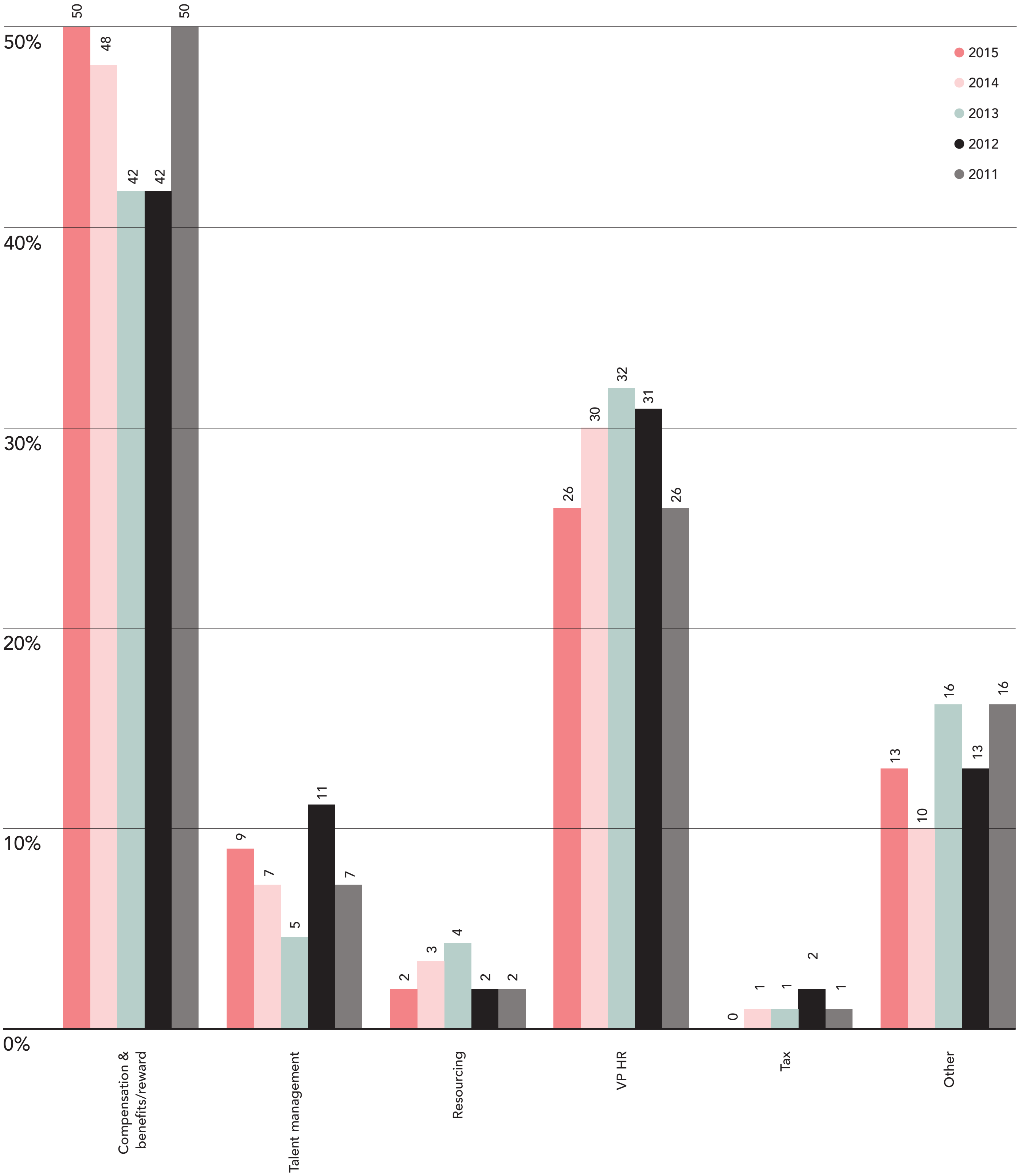
Where does your global mobility team report?



Most global mobility teams still report primarily into compensation and benefits/reward or VP HR. There was a continued slight decrease in those reporting to VP/HR (down from 30.2% in 2014 to 26% this year).

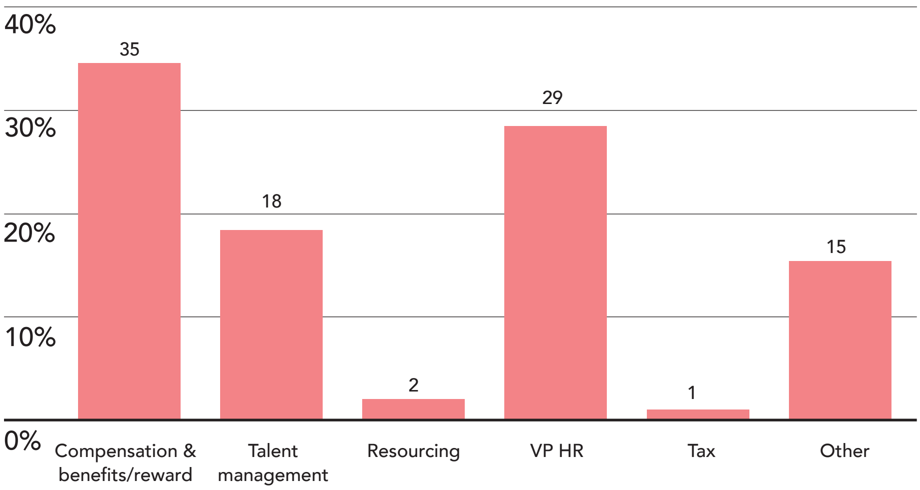
This year we gave respondents the opportunity to select more than one reporting line and those who did so have been included within 'Other'. 55% of those categorized as 'Other' had a combination of reporting lines and 28% said they reported to HR service delivery/shared services. Combinations varied and typically had two or three reporting lines, including: compensation & benefits/reward (75%); talent management (50%); resourcing (19%); VP HR (38%); and tax (19%).

It is interesting to see the shifts in reporting lines since 2011. Again there was an increase in those reporting to talent management (7% in 2014 to 9% in 2015) and compensation & benefits/ reward (48% in 2014 to 50% in 2015).

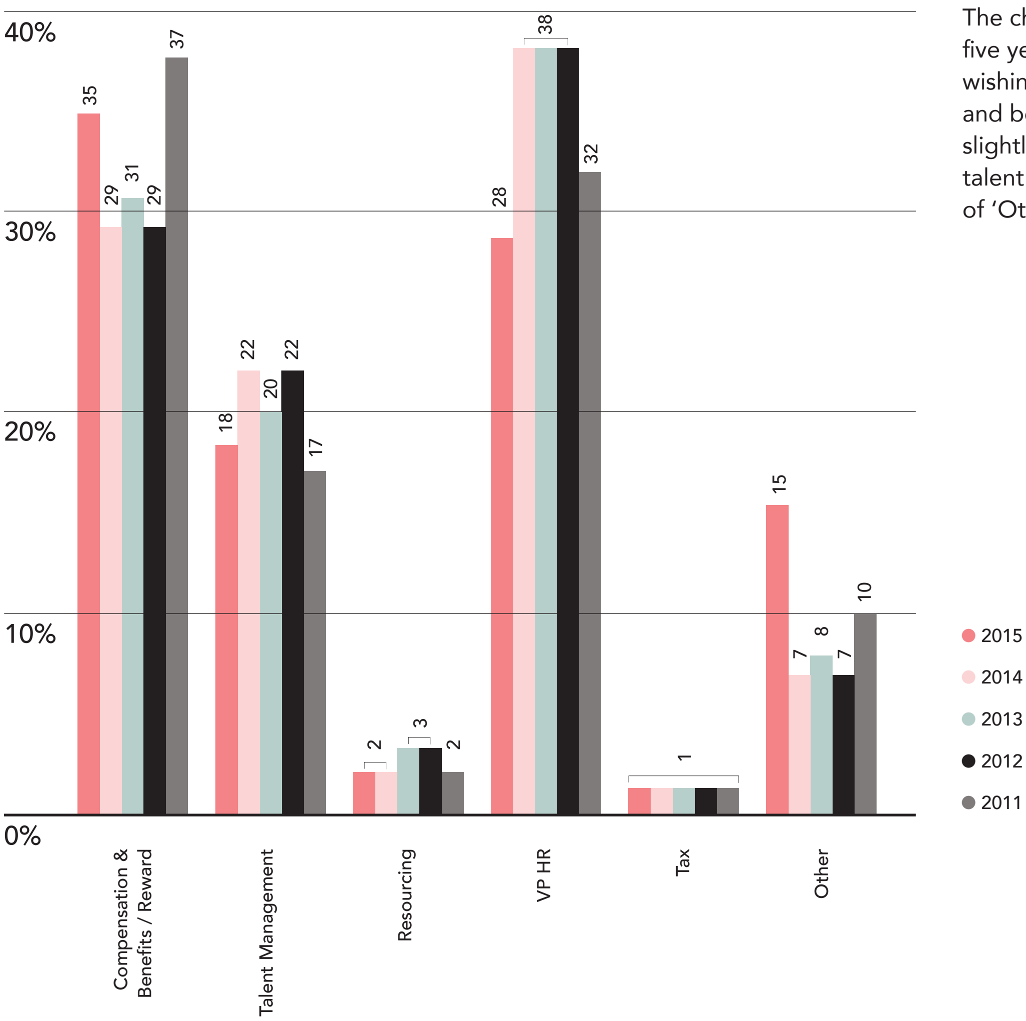


Where should your global mobility team report?

Respondents were also asked where they thought global mobility should report, irrespective of where it currently reports.



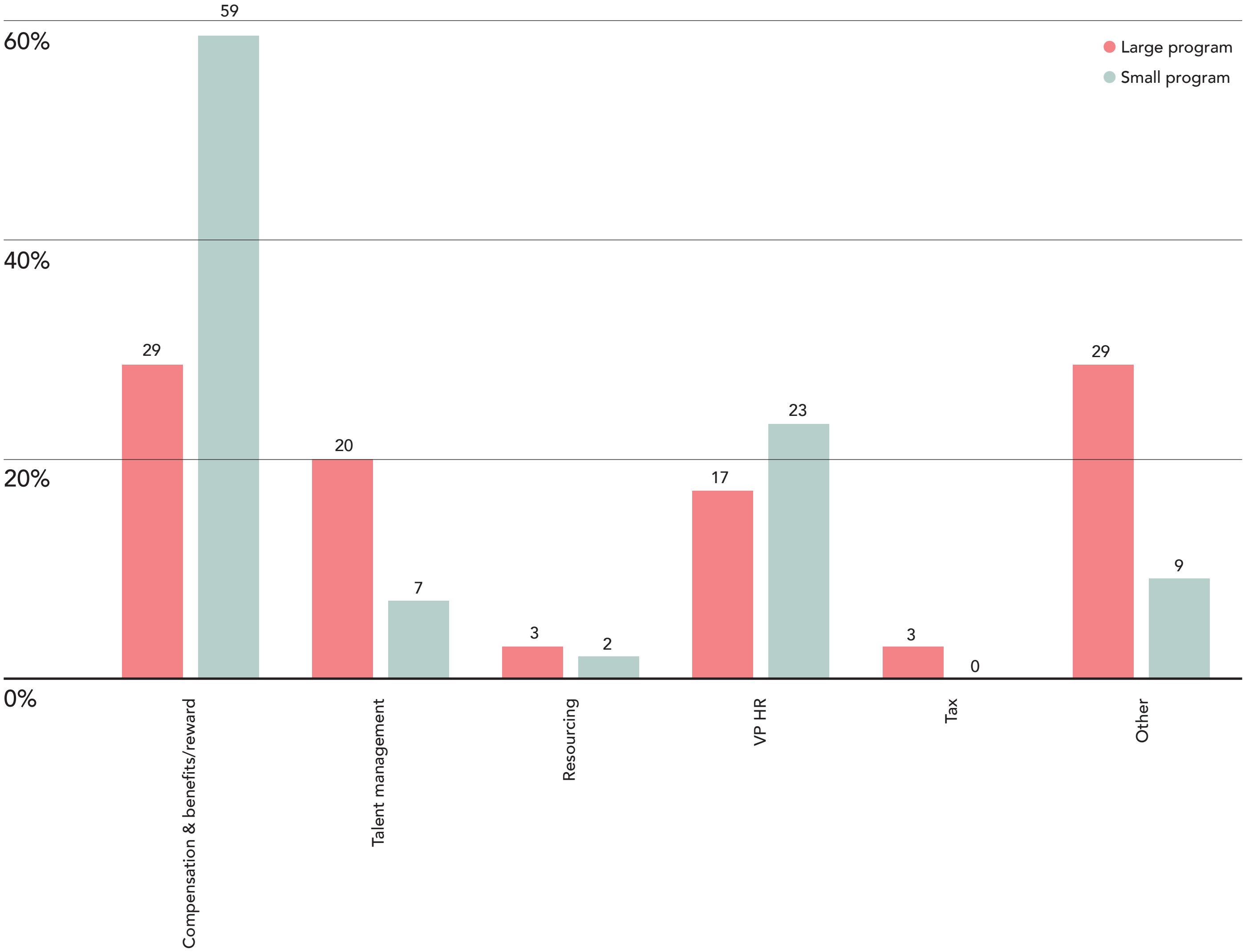
As with last year, when given the option of reporting lines there is a shift away from compensation & benefits/reward toward VP HR and talent management (although compensation & Benefits/ Reward is still preferred by a slight majority). It is interesting to see the proportion of respondents choosing a combination of reporting lines as the preferred option. These represent 89% of those in the 'Other' category. The combinations varied and were split as follows: compensation & benefits/ reward (72%); talent management (66%); resourcing (9%); VP HR (41%); and tax (28%).



The chart shows trends over the past five years. While the proportion of those wishing to report into compensation and benefits/reward has increased slightly, the move towards VP HR and talent management has reduced in favor of 'Other' options (ie matrix reporting).

Detailed analysis

Comparing large and small programs: where global mobility currently reports



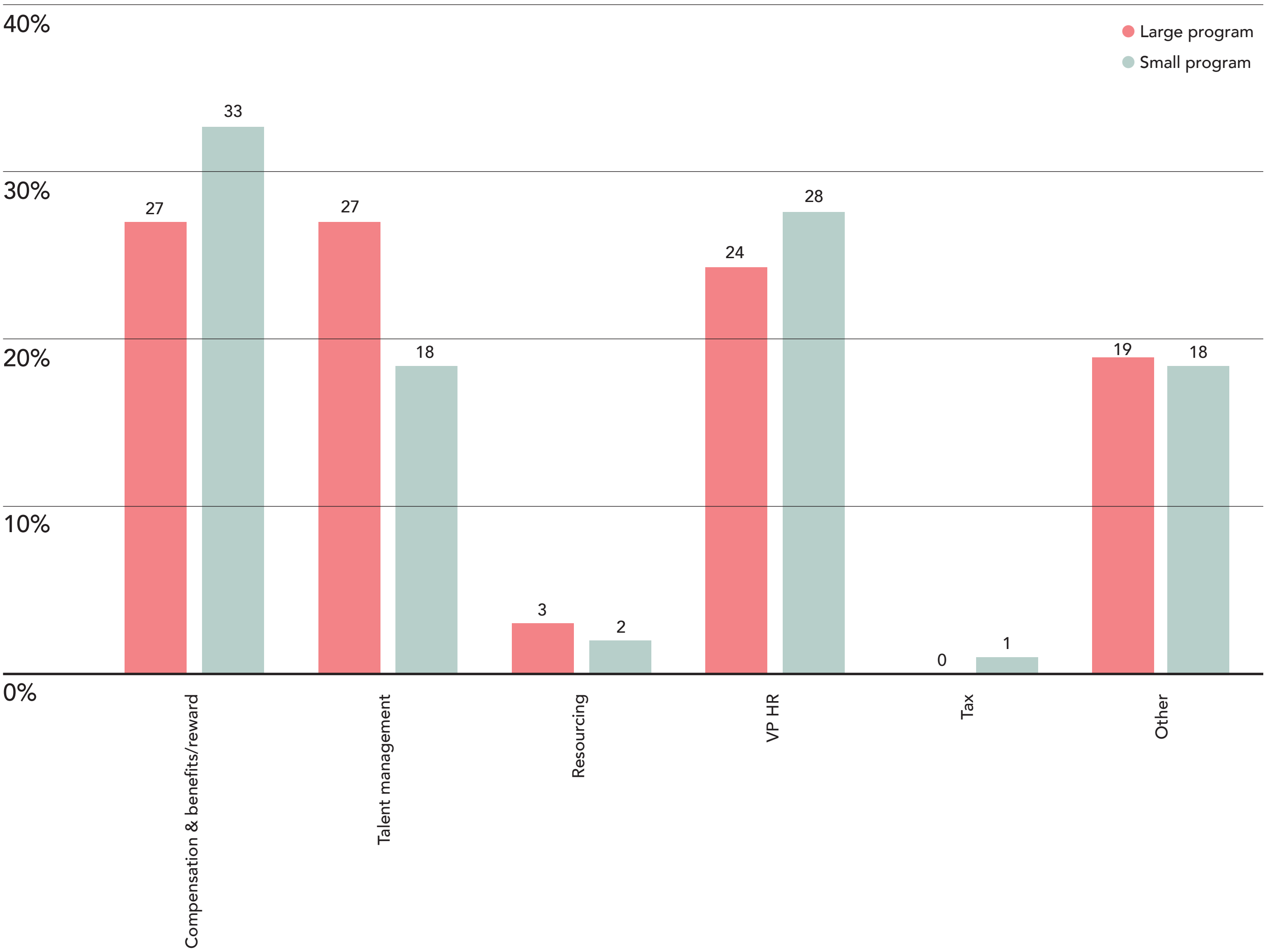
For ease of definition, organizations with fewer than 100 assignees were considered to have small programs; those between 100 and 1,000 were considered to have medium programs and those over 1,000 assignees were considered as having large programs. The size of the program does not depend on the company size, but the number of assignees worldwide.

When looking at existing reporting lines, there was a marked difference between organizations with large programs and those with small programs.

As with previous years, there was a continued increase in the proportion of large programs reporting into talent management (increasing from 7% in 2013 to 14% in 2014 to 20% in 2015). Those large programs reporting into VP HR reduced from 31% last year to 17% this year and resourcing reduced from 10% to 3%. This reduction is offset by the proportion who selected 'Other' options – 50% of these referring to HR service delivery/shared services and 40% referring to a combination of reporting lines.

The results for small programs saw a continued drop in those reporting into VP HR (from 40% in 2013 to 31% in 2014 and 23% in 2015). Those reporting into compensation & benefits/reward continued to increase (from 39% in 2013 to 47% in 2014 and 59% in 2015). The proportion of 'Other' responses was similar to last year.

Comparing large and small programs: where global mobility should report



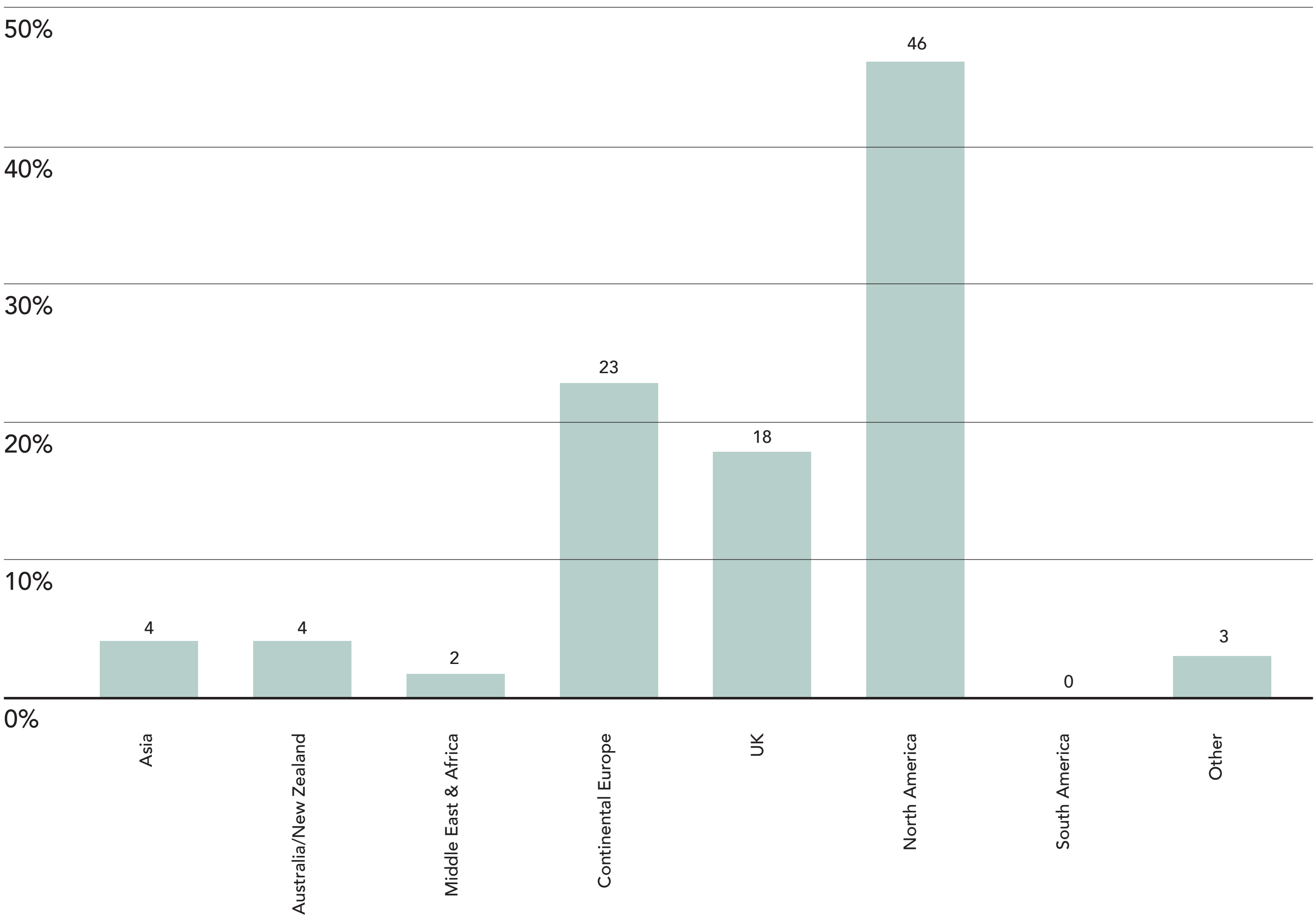
When asked about where they felt they should report, the most significant difference between those with large programs and those with small programs related to talent management. This year 27% of large programs opted to report into talent management compared with 18% of small programs. Last year we saw similar results for both.

There has been a shift in opinion when the overall results are compared with last year. In 2014 there was an increase in those with large programs who thought they should report into VP HR and those who thought they should report into compensation & benefits/ reward and a drop in those wishing to report into talent management. This year there was a drop in the proportion wishing to report to VP HR (41% in 2014 down to 24% in 2015), a slight increase in those wishing to report to compensation & benefits/reward and talent management (both 24% last year and both 27% this year) and a significant increase in those categorized as 'Other' (3% to 19%). The majority within the 'Other' category referred to a combination of reporting lines.

For those with small programs there was a continued drop in the proportion that thought they should report into VP HR (38% last year down to 28% this year). Last year's increase in those wishing to report into talent management was not replicated this year (down from 25% in 2014 to 18% in 2015).Those wishing to report to compensation & benefits/reward increased from 28% to 33%. Once again there was a significant increase in those categorized as 'Other' (up from 5% to 18%), the vast majority of which indicated a combination of reporting lines.

Where is the head of global mobility located?

In 81% of cases the head of global mobility is based in the headquarter location.



Caseload ratio of assignees per global mobility professional

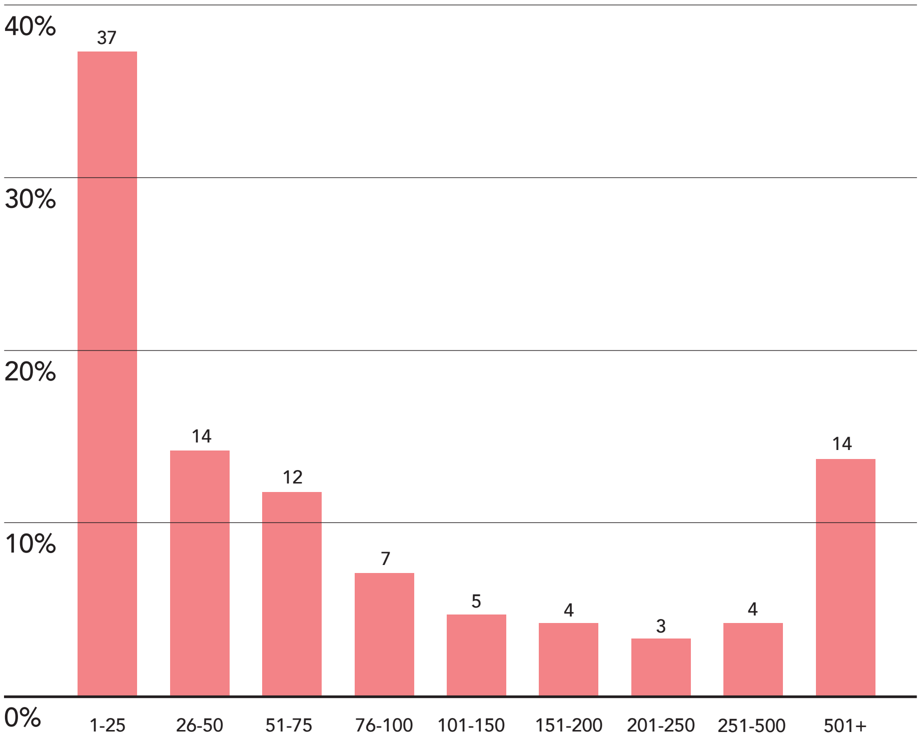
One question that is often posed and debated by global mobility professionals is what the appropriate ratio of assignees per global mobility professional should be. This is usually referred to as the caseload ratio.

It is quite a difficult question to answer because the level of work associated with an assignee program depends on numerous factors, including volume, level of assistance provided, reliance on external vendors and assignment duration. Indeed, the number of assignment initiations per annum is possibly a much more important metric than the overall level of assignee numbers.

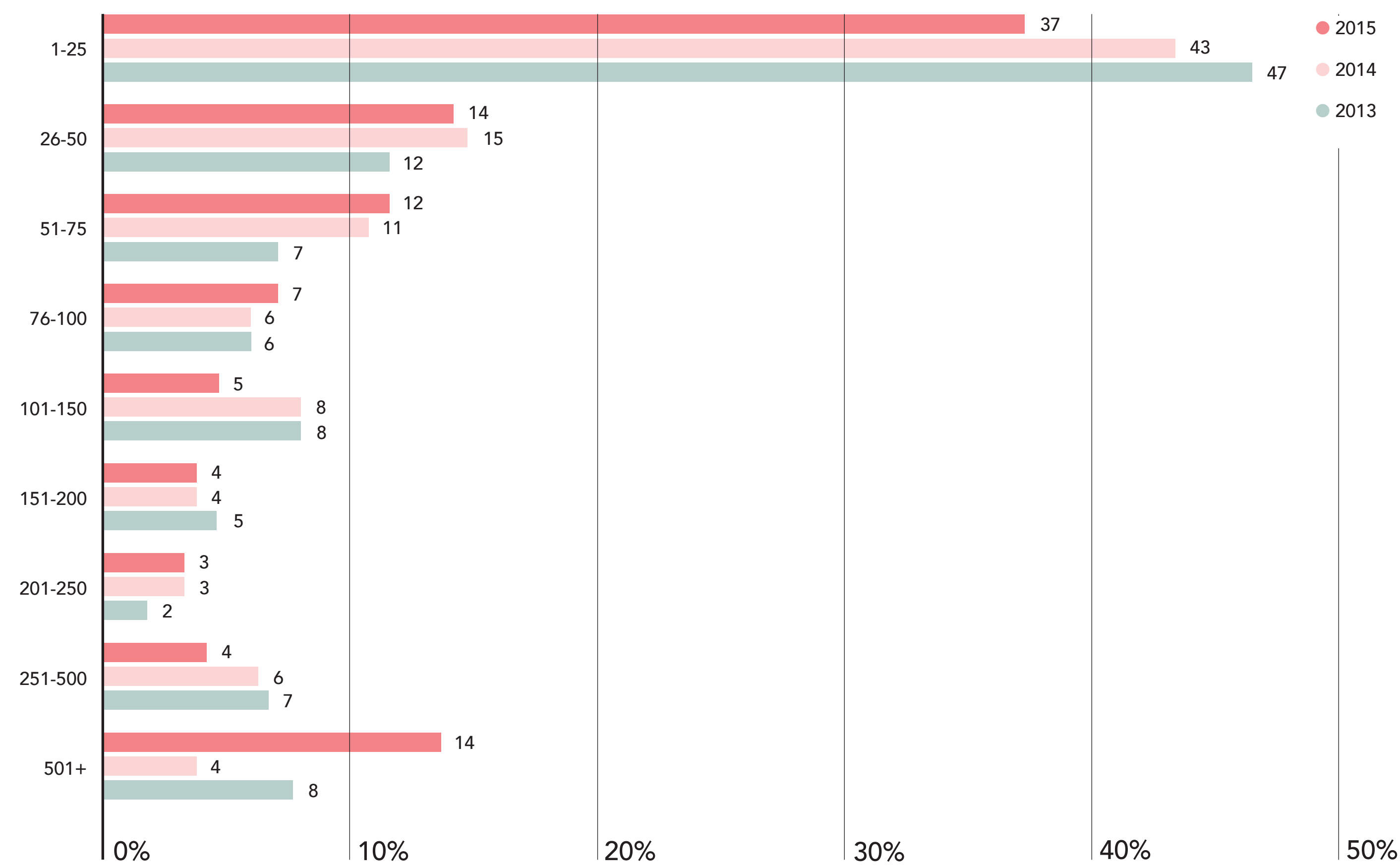
Nevertheless, our survey data has allowed us to draw some tentative observations about benchmark levels of assignee caseload per global mobility professional.

- For small programs (up to 100 assignees) the median caseload ratio was 19 assignees per head.
- For medium sized programs (100 to 1,000 assignees) the median caseload ratio was 35 assignees per head.
- For large programs (over 1000 assignees) the median caseload ratio was approximately 113 assignees per head.

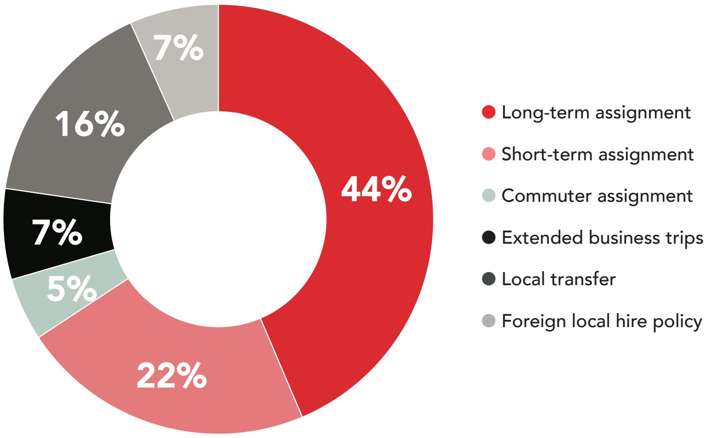
Assignment initiations in the past 12 months



When comparing the assignment initiation figures to last year's results, we can see an increase in the proportion that have initiated over 500 new assignments in the past 12 months (up from 9% last year to 14% this year) and a reduction in the number that have initiated 1-25 new assignments in the past 12 months (down from 43% last year to 37% this year). There was a slight reduction in all categories between 101 and 500 assignees and a slight overall increase in those who had between 25 and 100 assignees initiations.



What percentage of assignees fit into the following types of assignments?



As expected, long-term and short-term assignment policies continue to be the most common policies in place. There was little change in the percentages of assignees being sent on other types of assignment, other than an increase from 10% to 16% of local transfers.

Salary data

Survey participants were asked to indicate their overall pay bill (base salary plus bonus only) for their global mobility team and from this we can estimate the median costs of running a global mobility team. In 2015 the median cost was $2,239 per assignee. (This was purely the salary/bonus cost only and did not include benefits or establishment overheads). The inter-quartile range for running a global mobility team was $1,176-$5,153 per assignee.

Cost of running the global mobility function

Due to the large range in salaries, the results have been split between lower quartile, median and upper quartile. The median and upper quartile figures are either the same as or higher than last year. The lower quartile has increased for managers and above, stayed roughly the same for administrators and reduced for consultants.

Summary	Lower Quartile	Median	Upper Quartile
Global mobility administrator	USD 39,688	USD 51,000	USD 60,000
Global mobility consultant	USD 55,275	USD 70,000	USD 83,750
Global mobility manager	USD 82,500	USD 100,000	USD 125,000
Regional head of global mobility	USD 103,750	USD 122,500	USD 150,000
Head of global mobility	USD 121,500	USD 150,000	USD 199,500

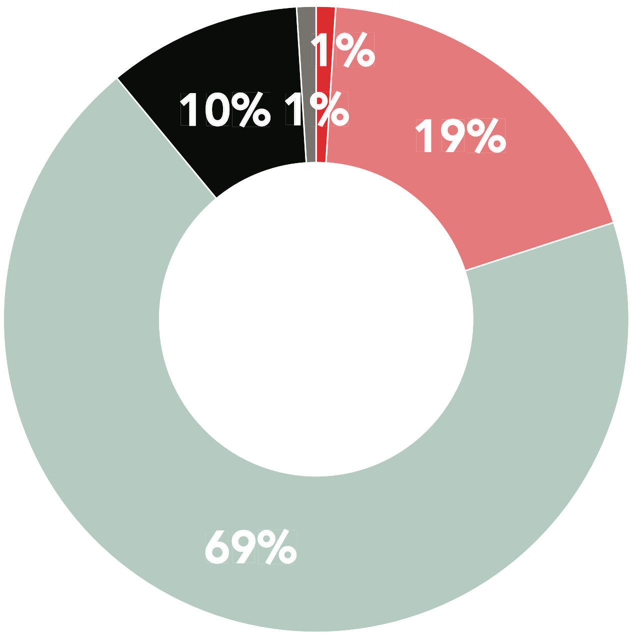
The survey also looked at the bonus structure of global mobility professionals.

Summary	0%-10%	11%-25%	26%-50%	Other
Global mobility administrator	82%	6%	0%	12%
Global mobility consultant	80%	14%	0%	5%
Global mobility manager	54%	39%	2%	5%
Regional head of global mobility	37%	35%	12%	16%
Head of global mobility	30%	40%	21%	9%

As with last year, the majority of global mobility administrators, consultants and managers said the bonus was between 0% and 10% of base salary.

In 2013 and 2014 the majority of global mobility heads or regional heads said that bonus was between 11% and 25% of base salary. This year the spread is slightly different, with an increase in regional heads who indicated 26%-50% (up from 6% to 12%) or 'Other' (up from 12% to 16%). Heads of global mobility were less likely to indicate 11% to 25% (down from 49% to 40%) but more likely to select 0-10% than last year (up from 22% to 30%).

How global mobility team sizes will change

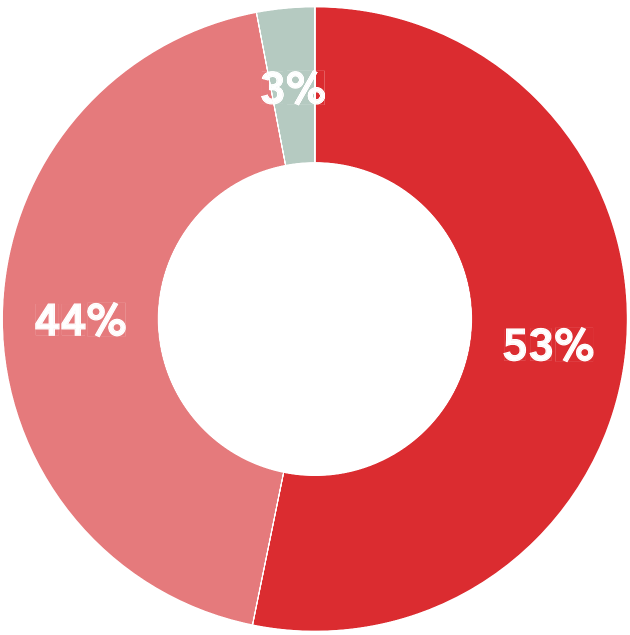


- Increase significantly
- Increase slightly
- Stay the same
- Reduce slightly
- Reduce significantly

The survey respondents were asked how, over the next 12 months, they expected the number of people in their global mobility team to change.

The proportion aiming to increase their team has gone down from 28% last year to 20% this year and the proportion expecting to reduce their team increased from 7% to 11% in 2015. Those who expected it to stay the same increased slightly from 65% to 69%.

Are your global mobility functions resourced correctly?



- Yes
- No – under-resourced
- No – over-resourced

The survey respondents were asked if they felt their global mobility function was resourced correctly. 53% felt they were resourced correctly (up slightly from 49% last year), 44% felt they were under-resourced (down from 50% last year) and 3% felt they were over-resourced (up from 0.4% last year).

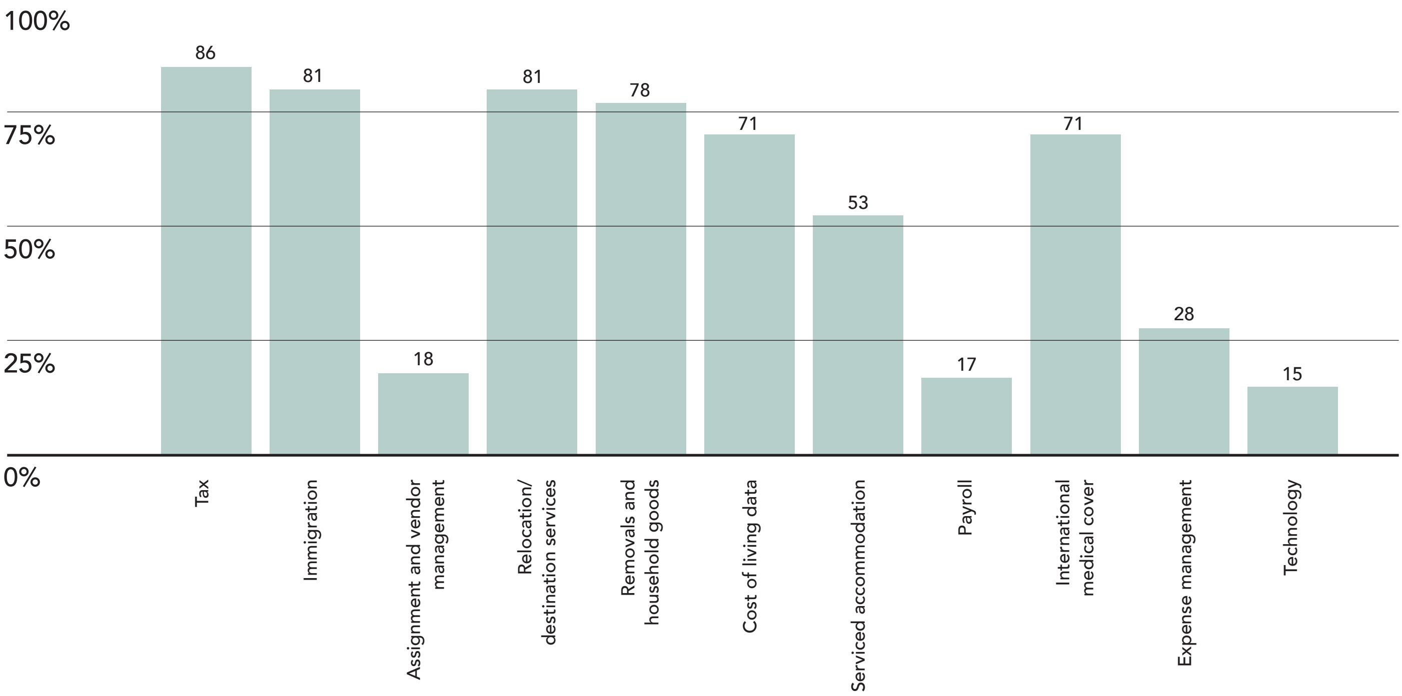
5

OUTSOURCED SERVICES

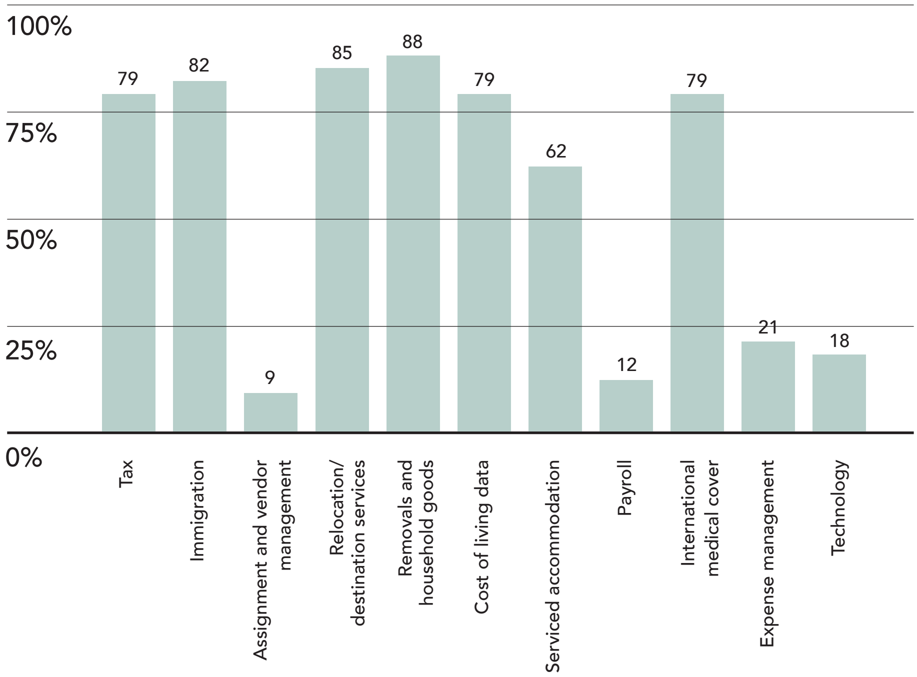
Organizations often find that outsourcing can present a better and more cost effective mobility solution than keeping everything in-house. This section reviews the various services organizations outsource (eg tax, immigration, assignment and vendor management, relocation/ destination services, removals and household goods, serviced accommodation, payroll, expense management and technology). The data also revealed a rough estimate of the cost of different services per assignee in relation to program size.

Outsourced services

For outsourcing overall, there was no significant change from last year. When looking at the services individually, there are slight increases and reductions but no major changes. The proportion of those who outsource their immigration, assignment and vendor management, relocation/destination services, payroll and expense management increased slightly. The biggest increases were expense management (up from 20% to 28%) and payroll (up from 12% to 17%). There was a reduced proportion of organizations that outsourced the remaining services. The biggest reductions were cost of living data (from 80% to 71%) and removals and household goods, and serviced accommodation (from 84.3% and 59.1% to 78% and 53% respectively).

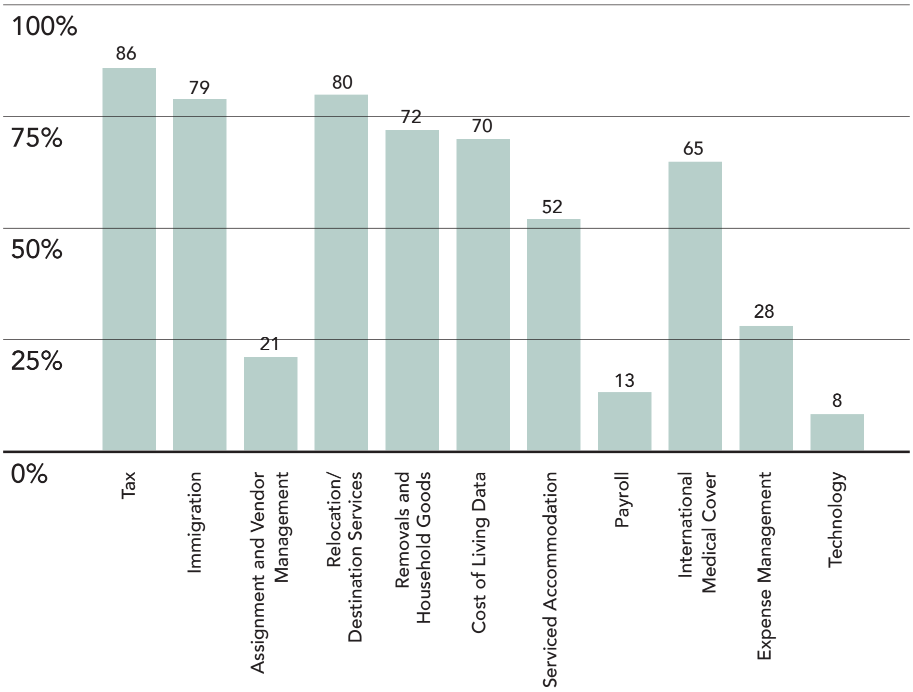


Outsourced services – large programs



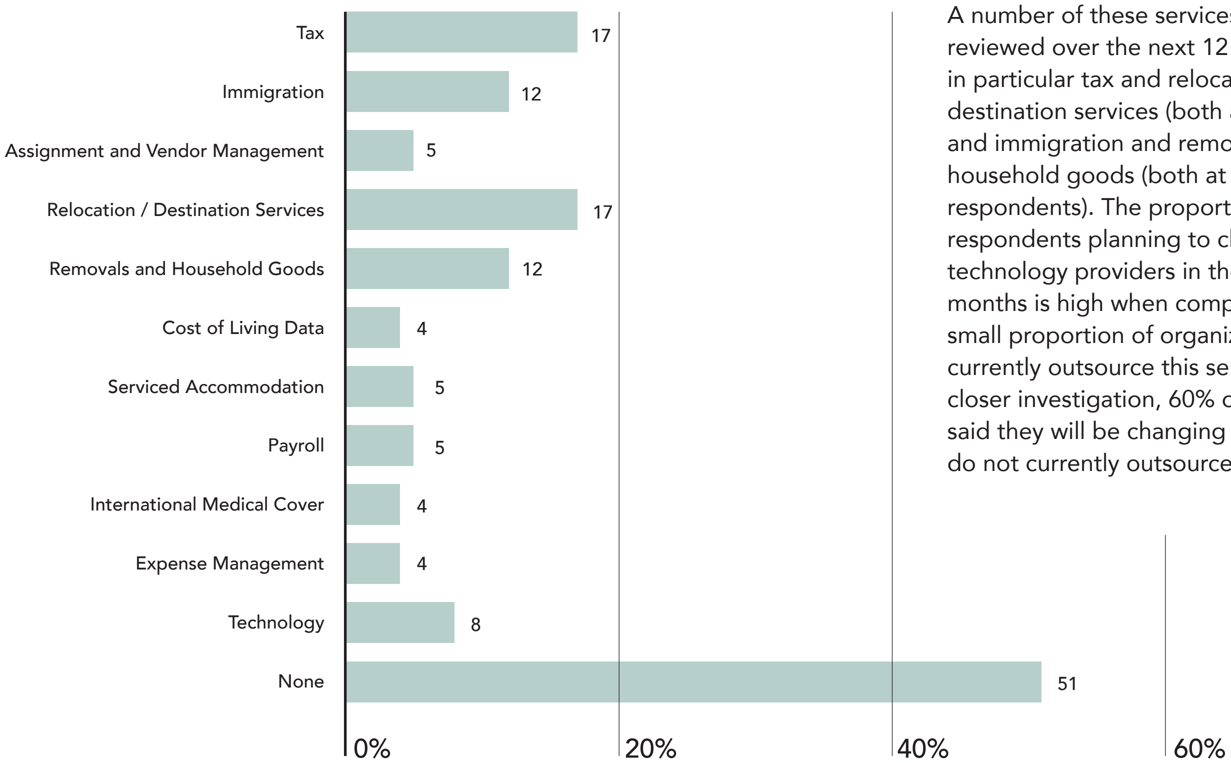
There was some difference between those that look after large programs and those that look after small programs. Last year, 69% of large programs outsourced their immigration service. This year it increased to 82%, overtaking the proportion of small programs that outsource the same service.

Outsourced services – small programs



Also noticeable year-on-year is the reduction in large programs that outsource technology (down from 31% to 18%) and the increase in large and small programs that outsource expense management (up from 14% to 21% in large programs and 18% to 28% in small programs).

Those planning to change providers over the next 12 months



A number of these services will be reviewed over the next 12 months, in particular tax and relocation destination services (both at 17%) and immigration and removals and household goods (both at 12% of respondents). The proportion of respondents planning to change technology providers in the next 12 months is high when compared to the small proportion of organizations that currently outsource this service. On closer investigation, 60% of those who said they will be changing providers do not currently outsource technology.

Detailed analysis

The data revealed a rough estimate of the costs of the different outsourced services per assignee. All figures are in US dollars. This data was calculated using the overall amount spent by the organizations on their assignees and the number of assignees worldwide. These figures are a rough estimate and will vary on program size. Please note, there was insufficient data provided to analyze an average cost per assignee for assignment and vendor management, payroll and expense management.

Commonly used services – detailed cost analysis

Respondents also provided an example of a typical cost for some of the most common services used. The charts show the lower quartile, the median and the upper quartile of the costs reported this year.

For many services the costs quoted by respondents this year were lower than last year.

Tax services	Lower quartile	Median	Upper quartile
US tax return	USD 1,200	USD 1,500	USD 1,813
Cost projection	USD 463	USD 525	USD 675
Entry/exit meeting	USD 388	USD 475	USD 703
Tax equalization calculation	USD 400	USD 463	USD 500
UK tax return	GBP 500	GBP 1,000	GBP 1,035

Relocation services	Lower Quartile	Median	Upper Quartile
Set-up fee for relocation management service provider	USD 463	USD 800	USD 1,350
Monthly fee for relocation management service provider	USD 131	USD 235	USD 360
Repatriation fee for relocation management service provider	USD 550	USD 900	USD 1,000
Cost of shipping a 20ft container between Europe and the US	USD 7,000	USD 12,000	USD 14,750
Typical home search in a major city	USD 500	USD 1,500	USD 1,800

Immigration Services	Lower Quartile	Median	Upper Quartile
Standard US visa	USD 1,150	USD 2,500	USD 5,125

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MARKET SHARE ANALYSIS

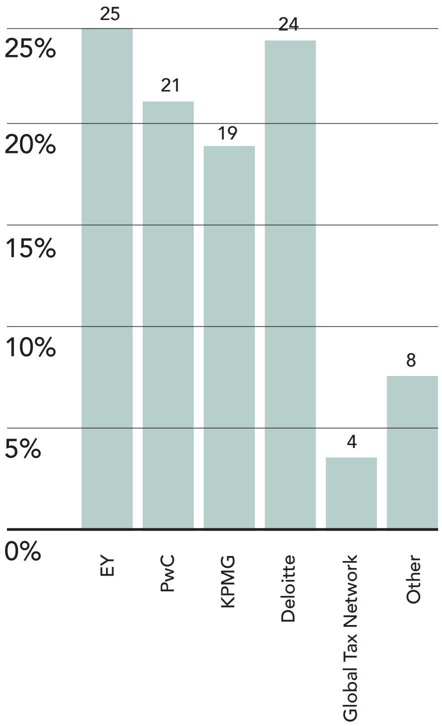
This section looks at the market share of the major service providers in the global mobility market. The different outsourced services include tax, immigration, assignment and vendor management, relocation/destination services, removal/household goods, cost of living data, serviced accommodation, international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

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

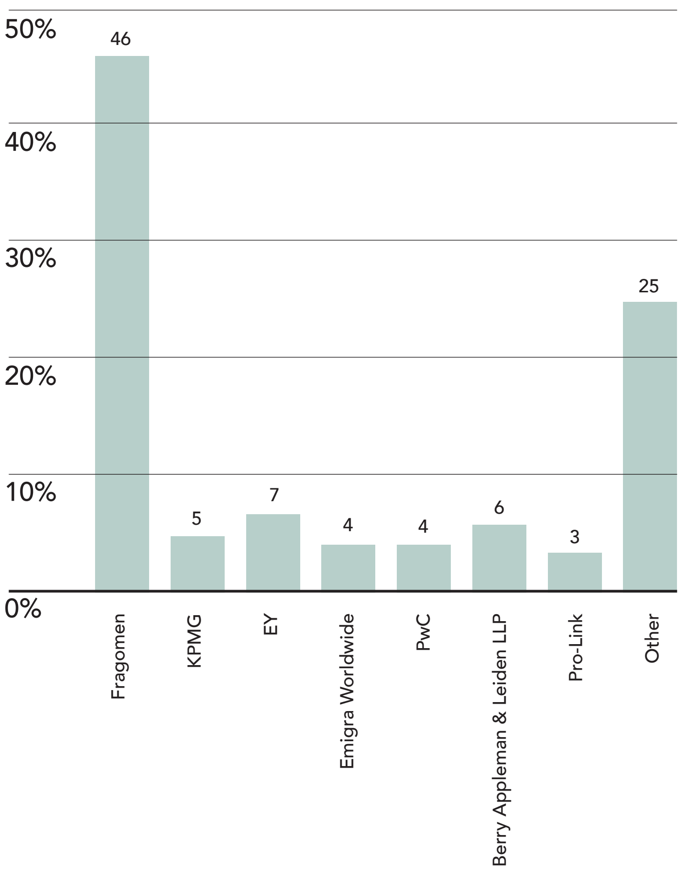
Tax

The Big Four continue to dominate the market for tax services, although for the first time we have seen evidence that EY (25%) and Deloitte (24%) have both overtaken PwC (21%). We would emphasise, however, that the results are within statistical margins of error.

Other firms used by the survey respondents included: Grant Thornton LLP, Baker Tilly, BDO, Boxx, GTN, Harbour HR, McGladrey, Moss Adams and Taxand.



Immigration

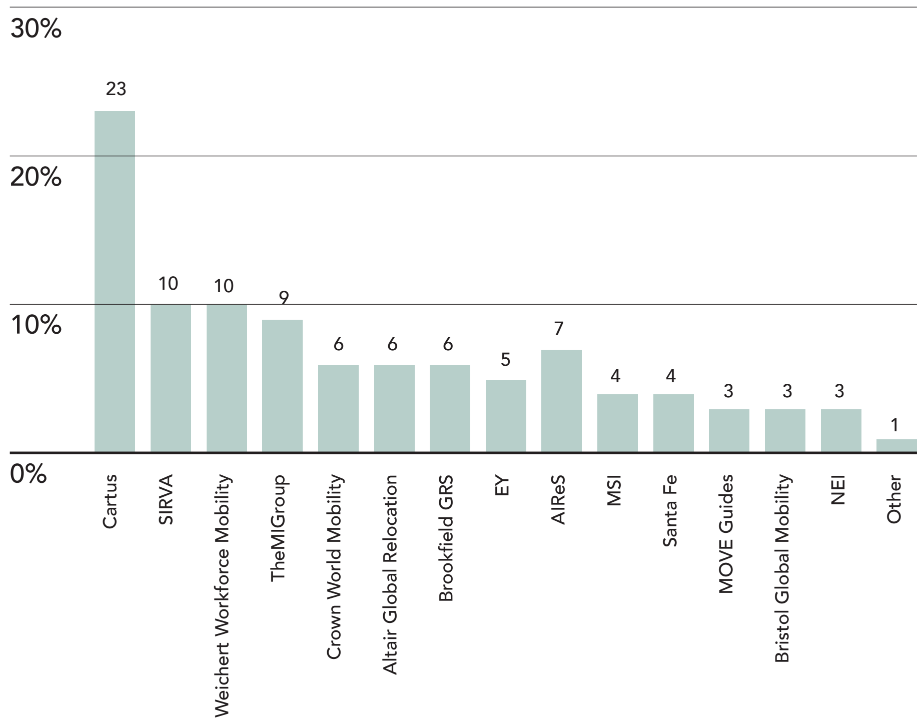


Once again the global market was dominated by Fragomen, which was used by 46% of respondents who outsource their immigration services. Other providers who had a significantly lower market share than Fragomen but an increased proportion of responses since last year included EY (7%), Berry Appleman & Leiden LLP (6%), KPMG (5%), PwC (4%), Emigra Worldwide (4%) and Pro-Link (3%).

There were a number of other firms used by the respondents. These included:

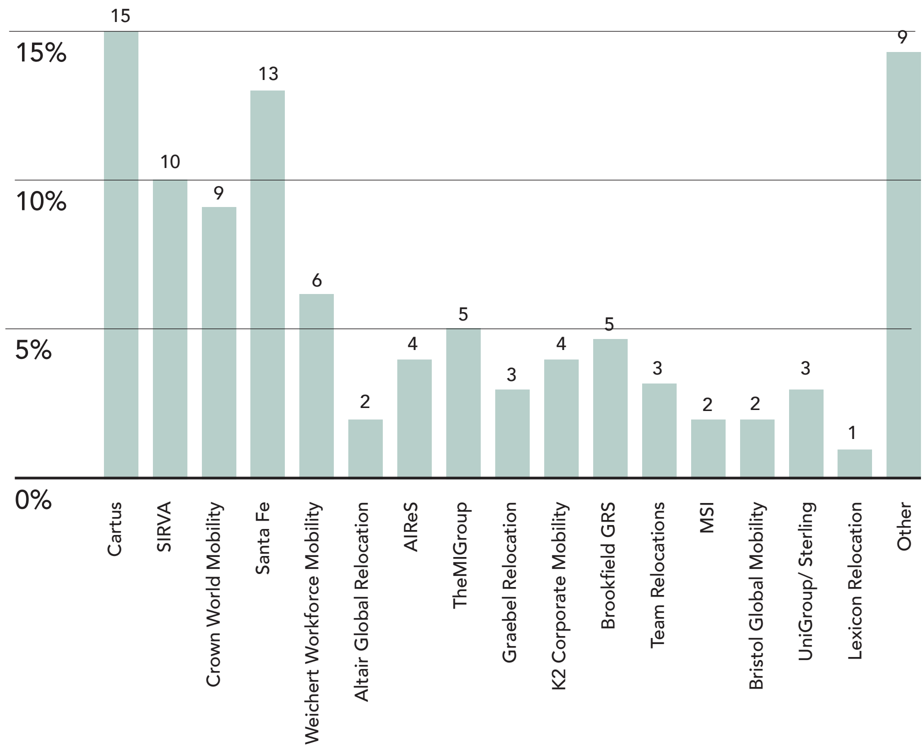
- Afrilogistics
- ASG
- Baker & McKenzie
- Barst Mukamal & Kleiner LLP
- BCF
- Bristol Global Mobility
- Brookfield GRS
- Crown World Mobility
- Deloitte
- DWI
- EIG
- Emigra Worldwide
- Ferguson Snell
- Foster LLP (formerly FosterQuan LLP)
- Greenberg Traurig
- Harbour HR
- Hunton & Williams LLP
- Immigration Law Group
- Magrath LLP
- Malitzlaw, Inc.
- Mayer Brown
- MinterEllison
- Moore & Van Allen
- NEI
- Pearl Law Group
- Proskauer
- Santa Fe
- Satterlee Stephens Burke & Burke LLP
- Seyfarth Shaw LLP
- SIRVA
- Sodagar Nielsen Law Group
- Team Relocations
- Tina Sharma Law
- Wormser, Kiely, Galef & Jacobs LLP

Assignment and vendor management



Cartus once again retained the highest market share this year and was used by 23% of those respondents who outsource their assignment and vendor management services. Other service providers used by the respondents included SIRVA, Weichert Workforce Mobility, TheMIGroup, AIReS, Altair Global Relocation, Brookfield GRS, Crown World Mobility, EY, MSI, Santa Fe, MOVE Guides, Bristol Global Mobility, NEI and Lexicon Relocation.

Relocation/destination services



Once again Cartus remained in the top spot with the highest market share of 15%, followed closely by Santa Fe, SIRVA, Crown World Mobility and Weichert Workforce Mobility. A number used a variety of providers.

Other companies that our respondents used included:

- AIReS
- Altair Global Relocation
- Asian Tigers Mobility
- Bristol Global Mobility
- Brookfield GRS
- Clearview
- Expat International
- FESCO
- Gosselin Group
- Grace Mobility
- Graebel Relocation
- Horizon
- K2 Corporate Mobility
- Lexicon Relocation
- TheMIGroup
- mobility matters
- MSI
- MOVE Guides
- NEI
- Paragon
- Personal Relocation
- Place2Place
- Plus Relocation
- QUEST
- RMR
- Relocation Support Services
- Santa Fe
- Sterling
- Team Relocations
- TheMIGroup
- UniGroup

Note: In some cases the reference to a service provider includes their network of independent suppliers.

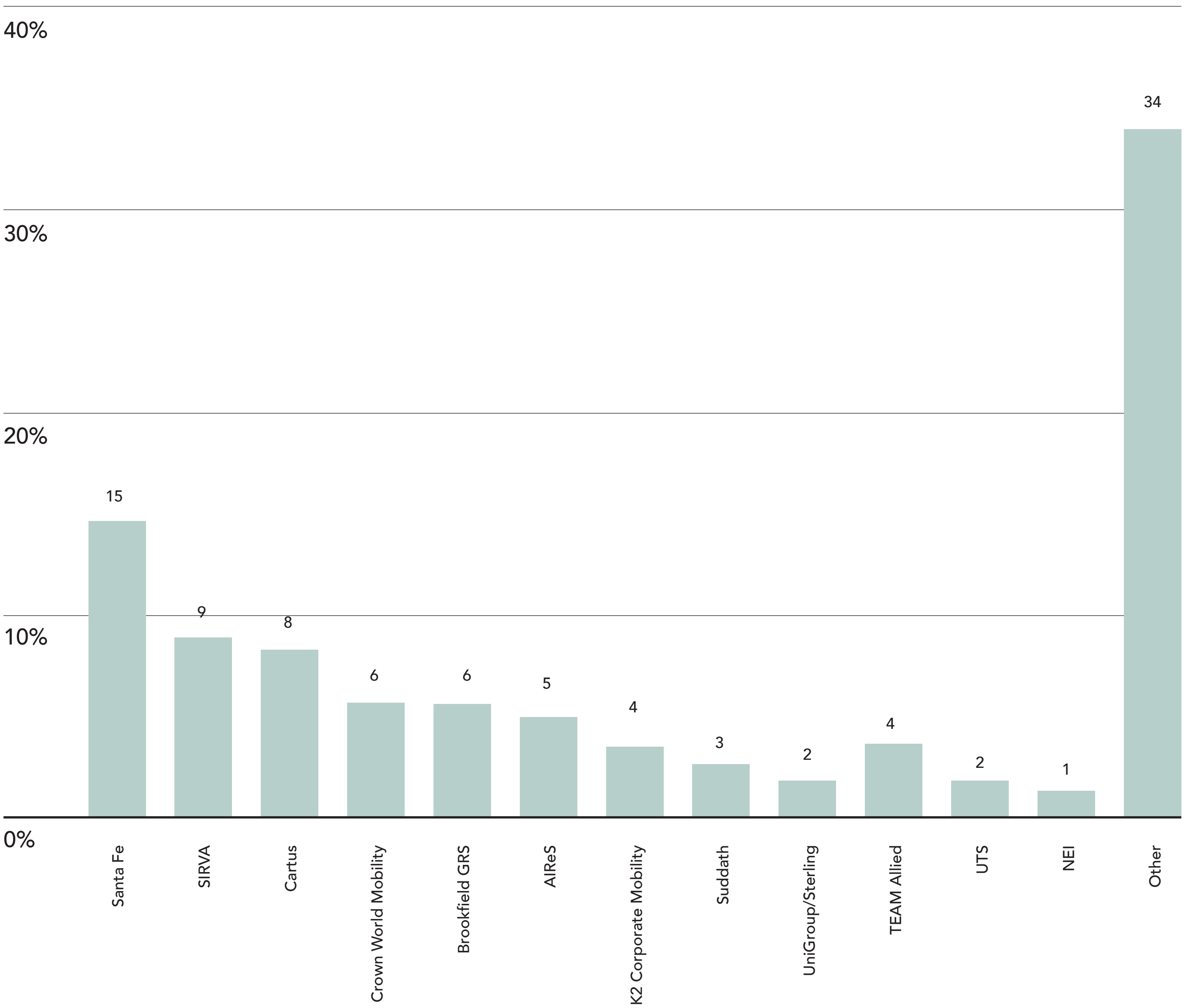
Removals and household goods

There were a wide variety of responses for this service. Santa Fe had the largest market share followed by SIRVA, which moved up from fourth place last year, and Cartus, which retained third position. A number of respondents used a variety of vendors.

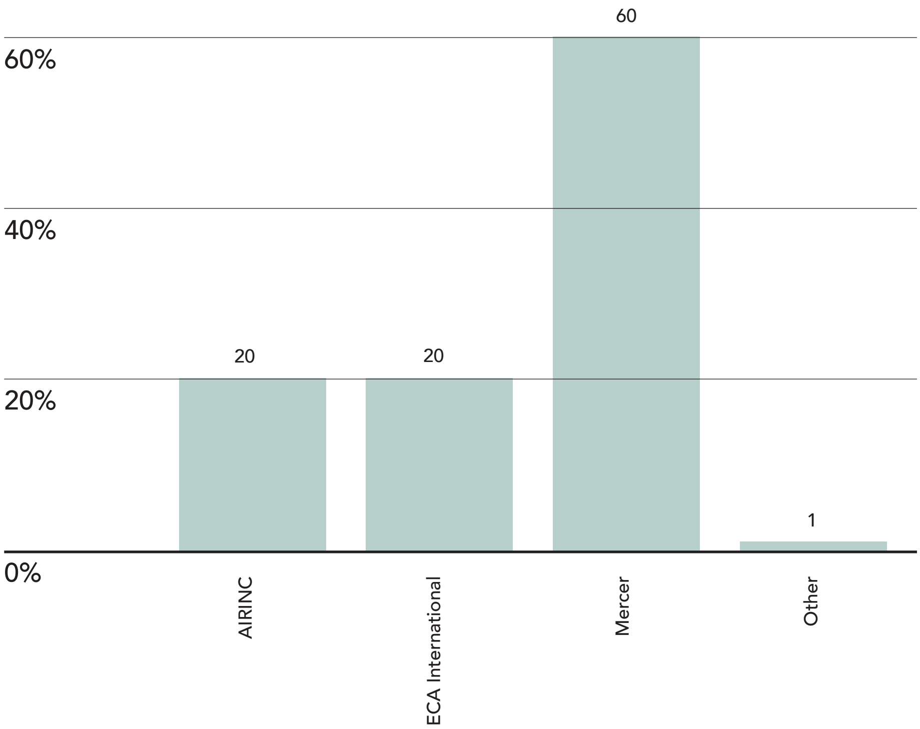
Other service providers that the respondents used were:

- AGS
- Altair Global Relocation
- Armstrong International
- Arpin Group
- Asian Tigers
- Aspire Mobility
- Bristol Global Mobility
- Champion International
- Chipman Relocations
- Graebel Relocation
- Interconnex
- Isaac's
- mobilitymatters
- MOVE Guides
- Mudanzas Rumbo
- New World Van Lines
- North American Van Lines
- Paramount
- Pickfords
- RMR
- Relocation Support Services
- Team Relocations
- TheMIGroup
- TWW
- United Van Lines
- Wayne Moving & Storage
- Weichert Workforce Mobility

Note: In some cases the reference to a service provider includes their network of independent suppliers.

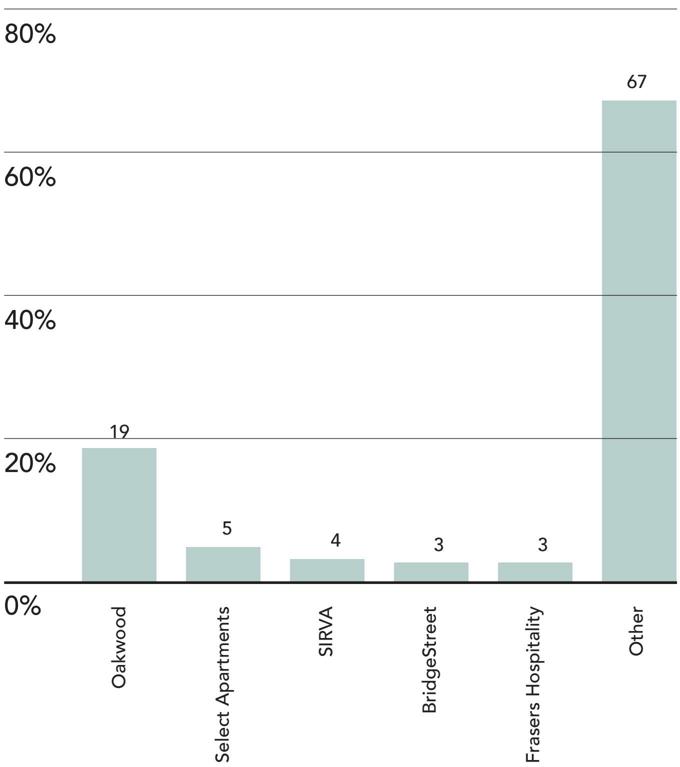


Cost of living data



Used by 59.5% of respondents who obtained cost of living data from an outside provider, Mercer once again maintained the highest market share. The other service providers mentioned included AIRINC (20%), ECA International (20%) and local providers.

Serviced accommodation

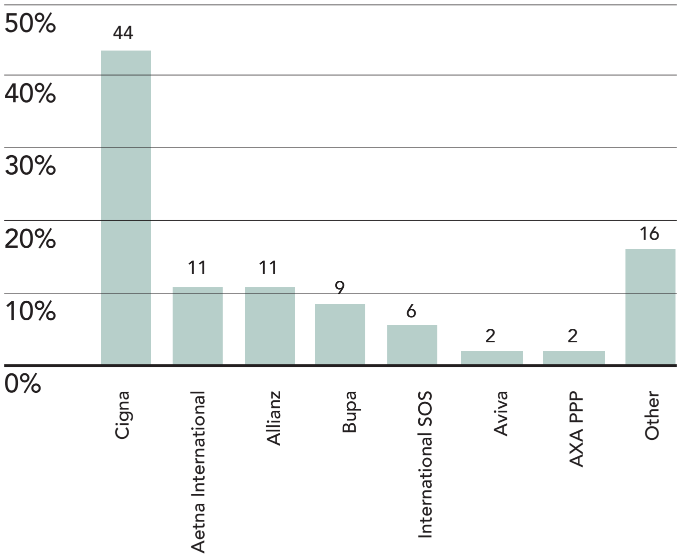


For the majority of those respondents that used a serviced accommodation provider, the market share was split between numerous providers (some using several different providers).
As with last year, Oakwood stands out as the leading provider in terms of market share.

Other service providers that the respondents used were:

- AIReS
- Altair Global Relocation
- Amber Lodging
- Bristol Global Mobility
- Brookfield GRS
- CWS
- Egencia
- Executive Quarters
- HomeCorp
- K2
- MOVE Guides
- National Corporate Housing
- Philip Rea
- Santa Fe
- SilverDoor
- SuiteAmerica
- Synergy
- Team Relocations
- Weichert Workforce Mobility

International medical cover

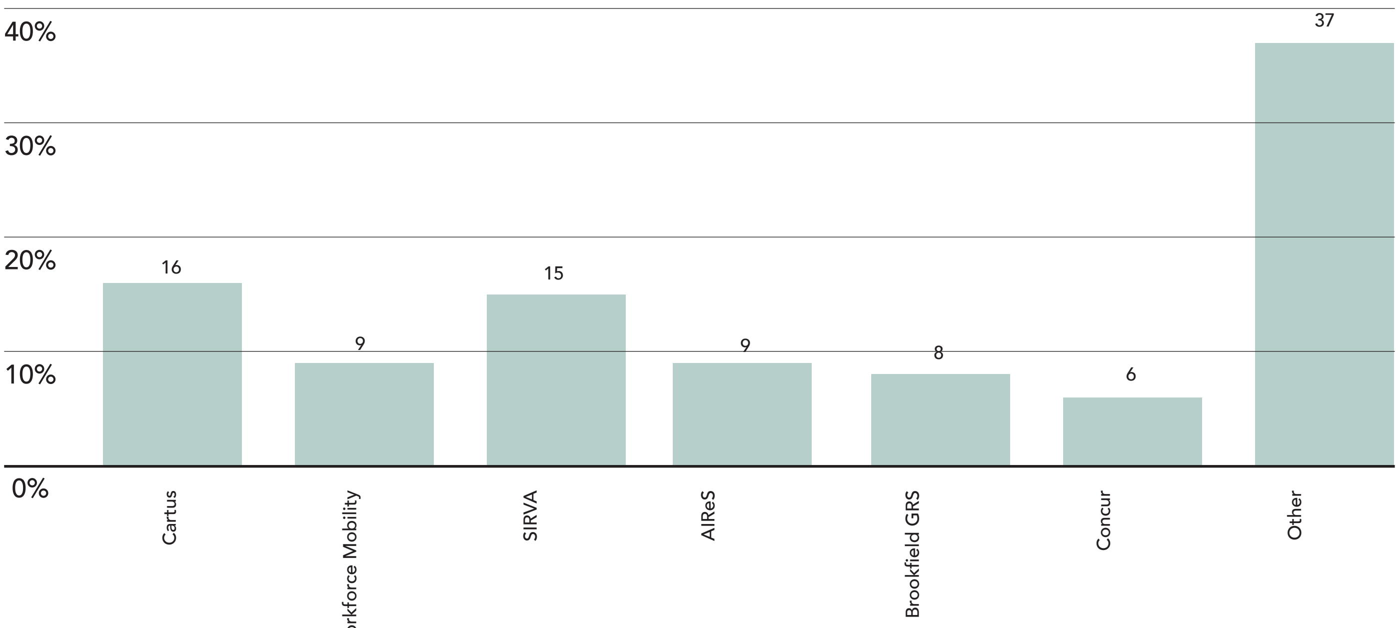


CIGNA once again clearly had the largest market share, with Allianz and Aetna in second place.

Other companies that our respondents stated they used were:

- Aon
- ACE Medical Inc
- AIG
- Continentale
- DavidShield
- Forte
- GeoBlue
- Globality Health
- Goudse
- Marsh
- MetLife
- Previnter
- United Healthcare

Expense management



Cartus had the largest market share, as it did last year, with SIRVA following close behind. AIReS appears on the chart this year with the same market share as a Weichert Workforce Mobility. Brookfield GRS and Concur also feature.

Other companies that our respondents used were:

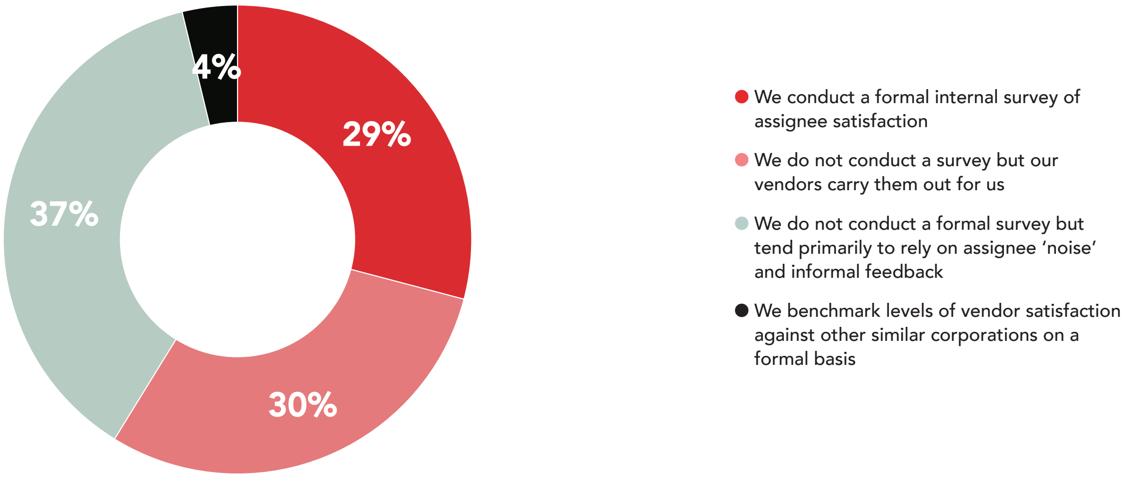
- Altair Global Relocation
- Bristol Global Mobility
- Graebel Relocation
- Hessel
- KPMG
- Lexicon Relocation
- MSI
- MOVE Guides
- NEI
- Polaris
- Santa Fe
- SFG
- TheMIGroup

7 VENDOR MANAGEMENT

Vendor management is one of the key challenges facing any global mobility professional – both corporate and service provider. This section analyzes the way organizations manage their service providers as well as how they rate them for quality of service, value for money, technical competence and professionalism and whether they would recommend them.

This section is based on the views submitted on 149 service providers. A full list of service providers mentioned by respondents is in Appendix B.

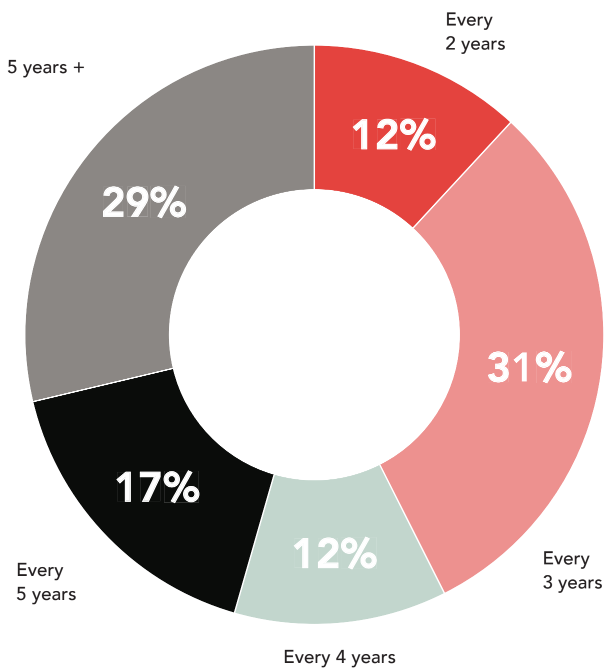
Managing Vendor Performance



There has been a continued shift toward a more formal approach to monitoring vendor performance. The number of respondents relying on assignee 'noise' is 37% (down from 42% in 2014 and 50% the previous year). There is a hike in those who conduct their own formal internal survey of assignee satisfaction (22% in 2014 and 29% this year) and those who formally benchmark levels of vendor satisfaction against similar organizations (up from 2% to 4%). The number of organizations relying on vendors to carry out surveys for them has reduced from 33% to 30%.

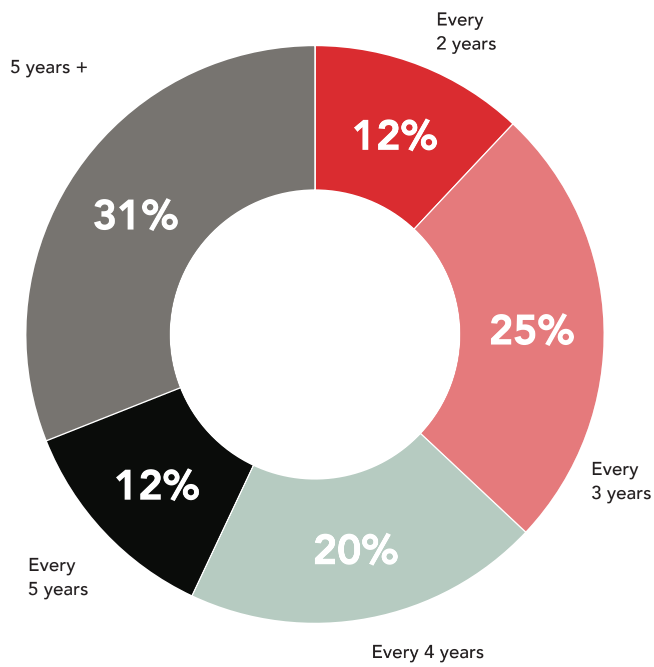
How often do you go out to request for procurement?

Tax



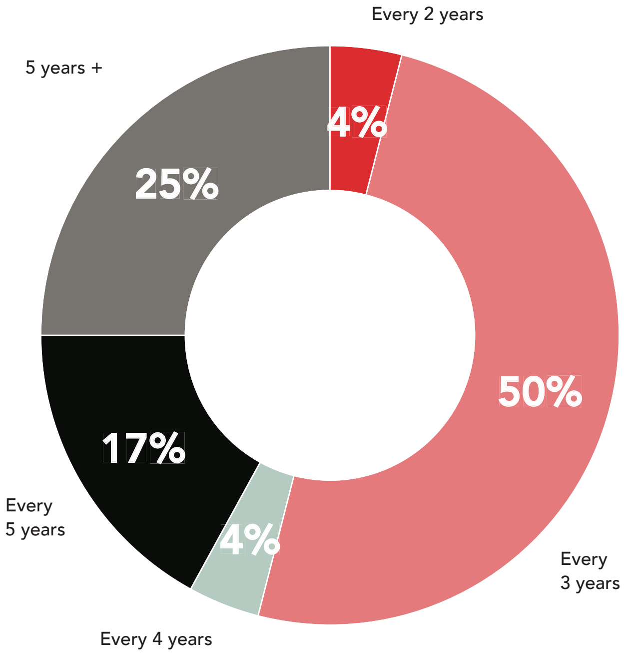
The most common response this year was to go out to RFP for a tax service provider every three years (31%). Last year the most common interval was more than five years (35%).

Immigration



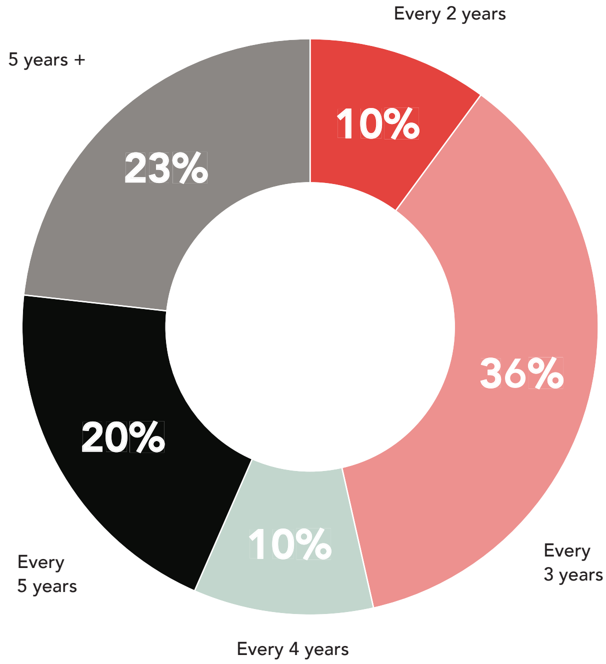
This year there was a reduction in the proportion going out to RFP every three years (from 35% last year to 25%). Those going out to RFP every four years increased from 5% to 20%.

Assignment and vendor management



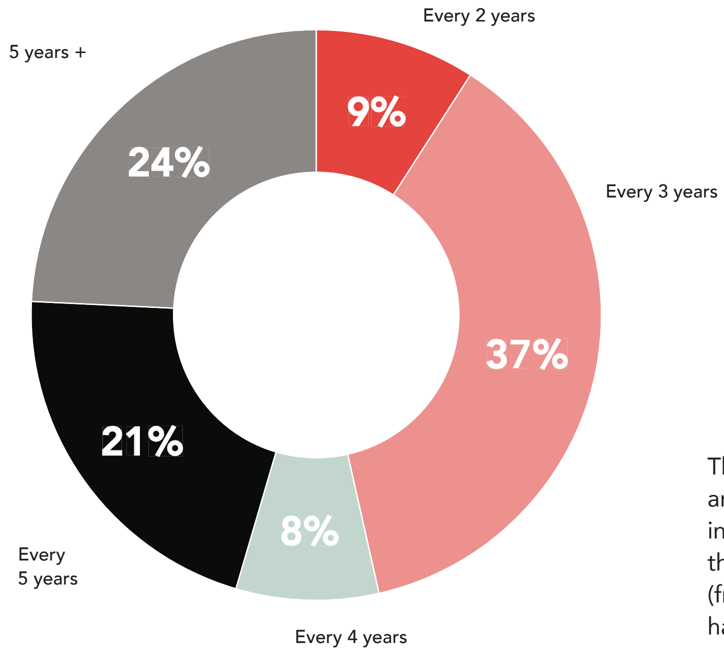
Last year the most common response was to go out to RFP at greater than five-year intervals (37%). This year half of respondents went out to RFP every three years compared with one third in 2014. The proportion going out every two years reduced (from 16% to 4%).

Relocation/destination services



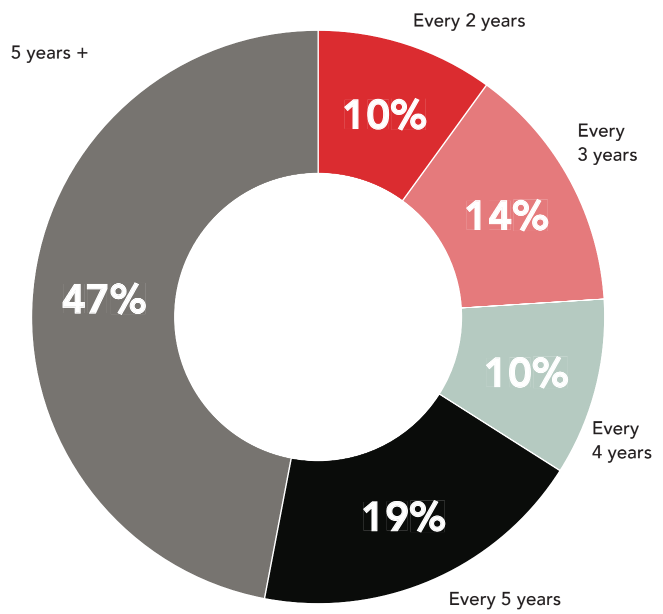
As with last year, the highest percentage of respondents went out to RFP for relocation/destination service providers every three years (34% in 2014 and 36% in 2015). However, fewer did so every two years (19% in 2014 and 10% this year) and more did so every five years (up from 10% in 2014 to 20%).

Removals and household goods



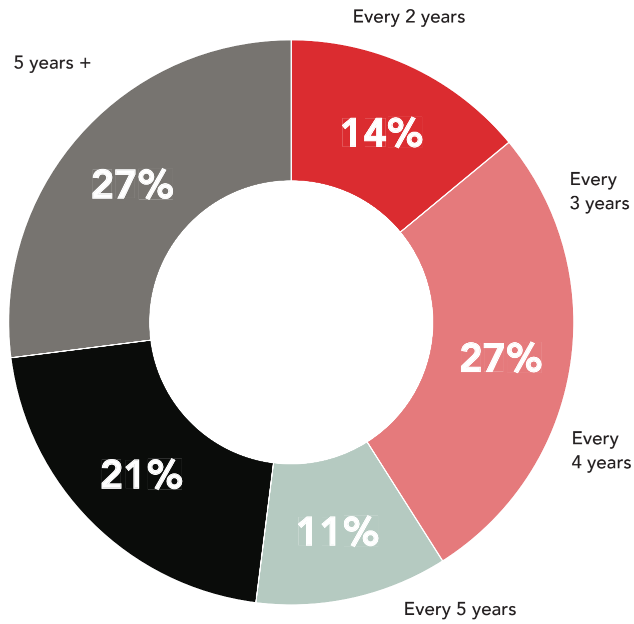
The most common response was to go out to RFP to removals and household goods service providers every three years (an increase from 34% last year to 37% this year). The number that go out to RFP every five years has gone up significantly (from 7% to 21%). Those going out to RFP every two years has reduced from 19% to 9% and every five-plus years has reduced from 31% to 24%.

Cost of living data



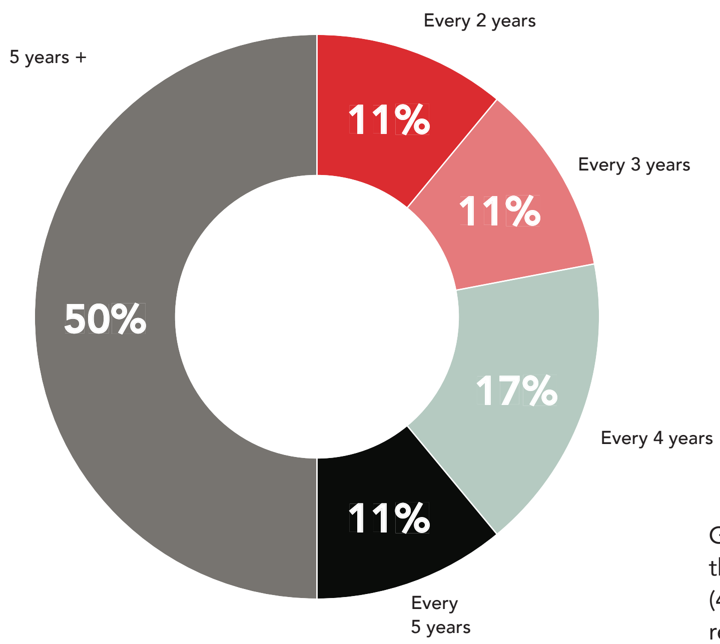
As with last year, the most common response was to go out to RFP at greater than five-year intervals (46% to 47%). The combined responses for the shortest intervals of two and three years reduced from 40% to 24%.

Serviced accommodation



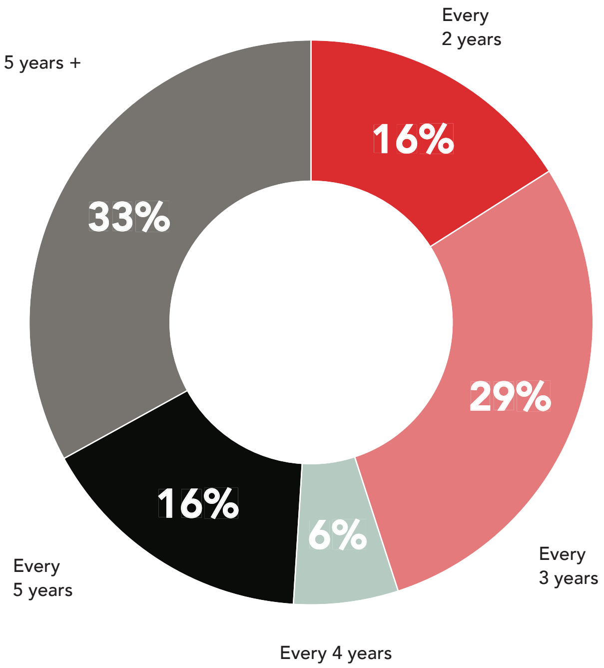
The proportion of survey respondents who go out for RFP to serviced accommodation providers every three, four and five years increased from 44% to 59%. Those going out every two years reduced from 23% to 14%.

Payroll



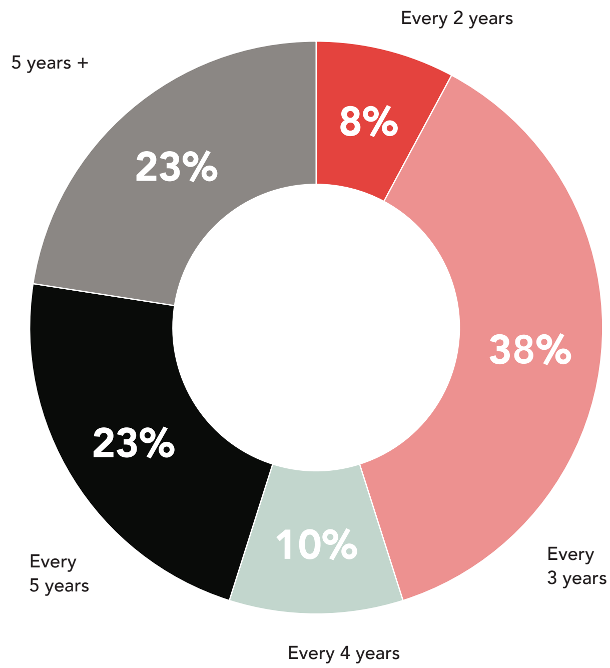
Going out to RFP for a payroll service provider at greater than five-year intervals remained the most common response (45% in 2014 and 50% this year). A lower proportion of respondents go out every two or three years (22% compared with 39% last year).

International medical cover



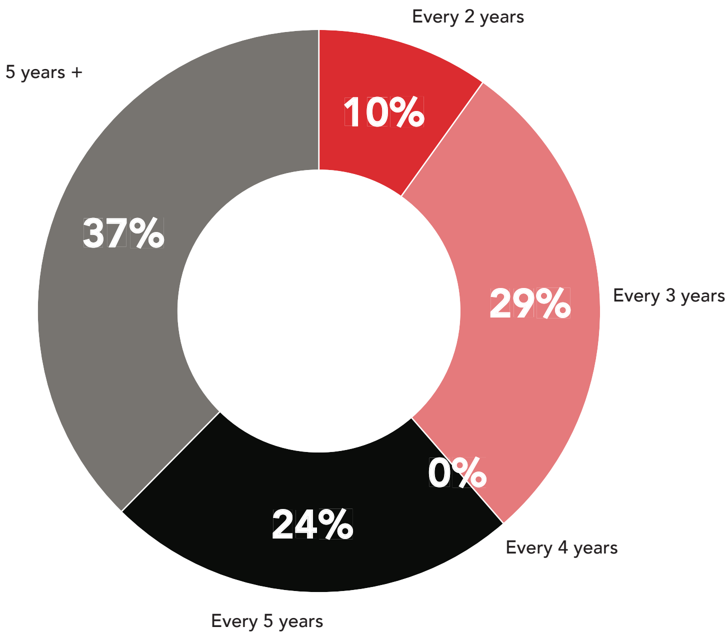
There was an increase in the proportion going out to RFP for an international medical cover provider every five years or more (from 34% last year to 49% this year).

Expense management



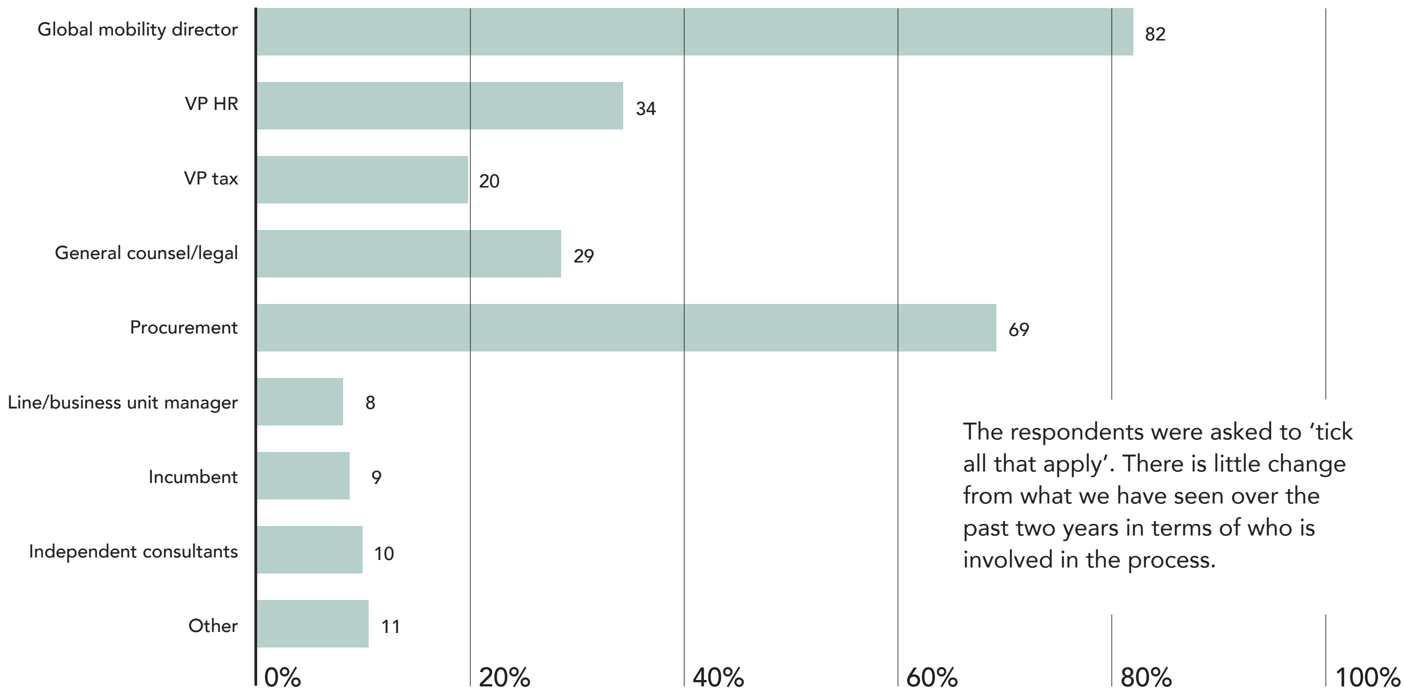
There has been a large reduction in the proportion that go out to RFP more than every five years (42% to 23%) but, when combined with those who indicated every five years, the results are similar year-on-year (47% to 46%). Those going out to RFP every two years reduced from 15% to 8%.

Technology



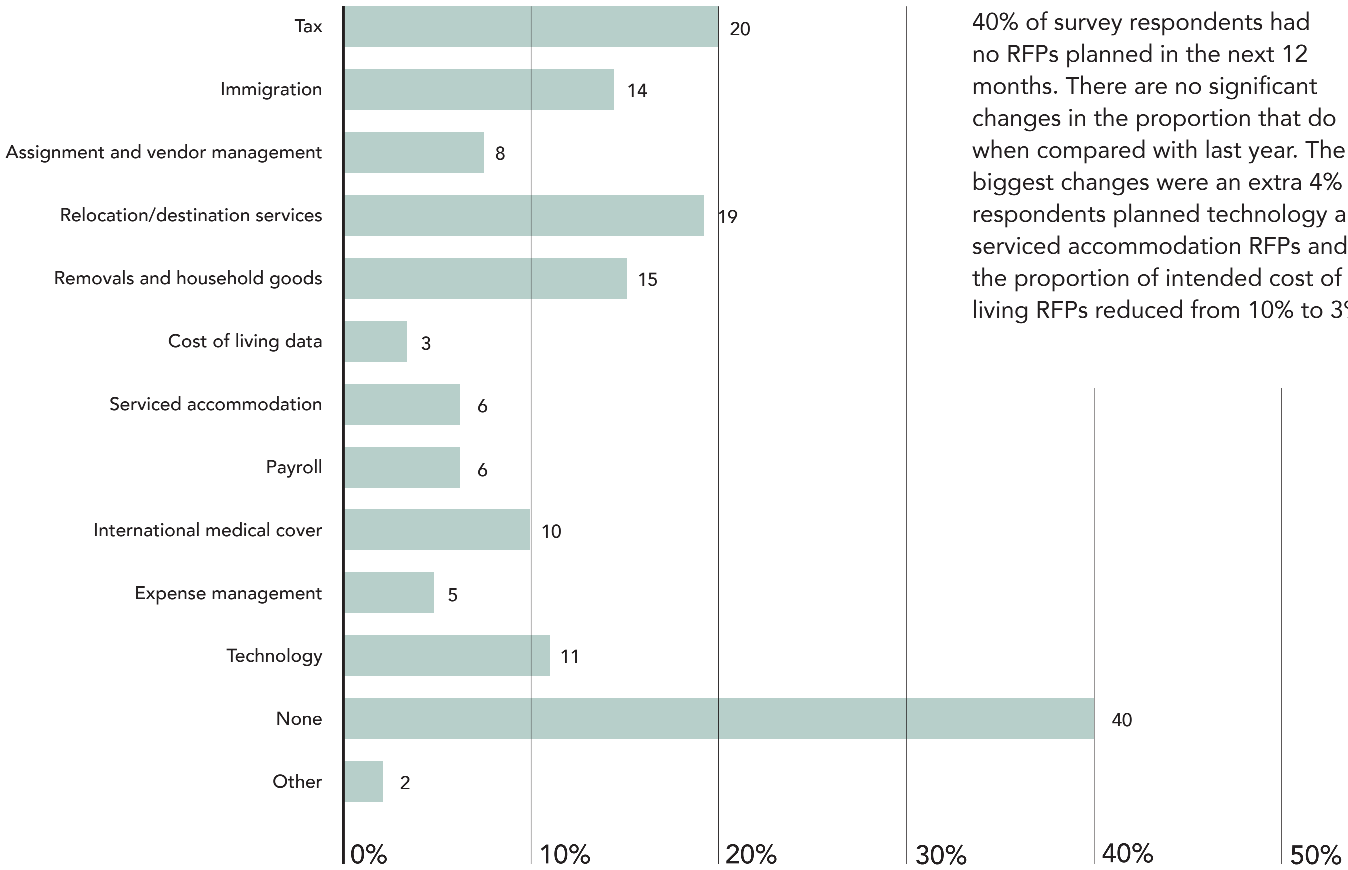
Those that go out to RFP every five years increased significantly from 9% to 24%. Those going out every two years reduced from 17% to 10%.

People significantly involved in the RFP process



The respondents were asked to 'tick all that apply'. There is little change from what we have seen over the past two years in terms of who is involved in the process.

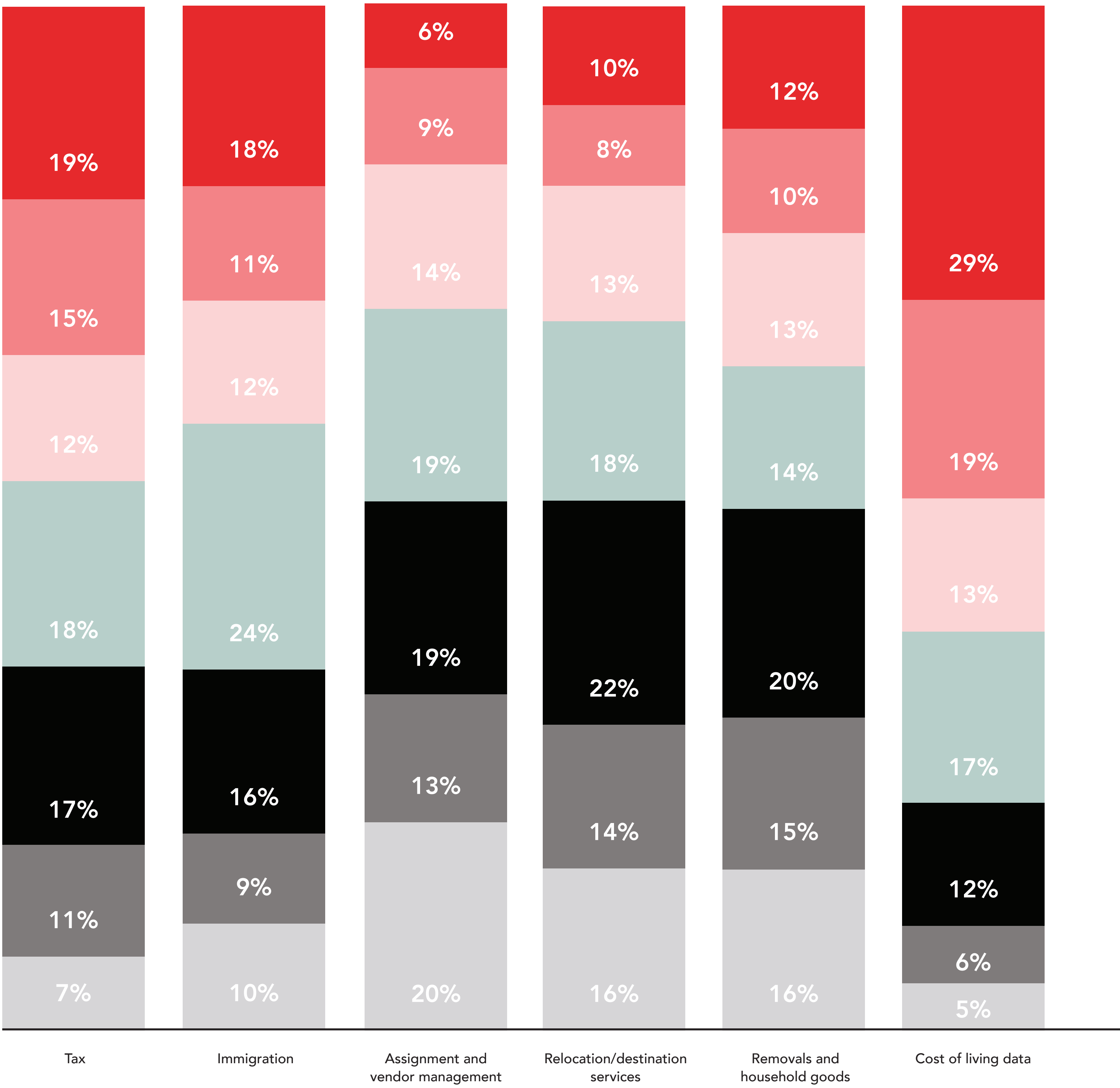
RFPs planned for the next 12 months



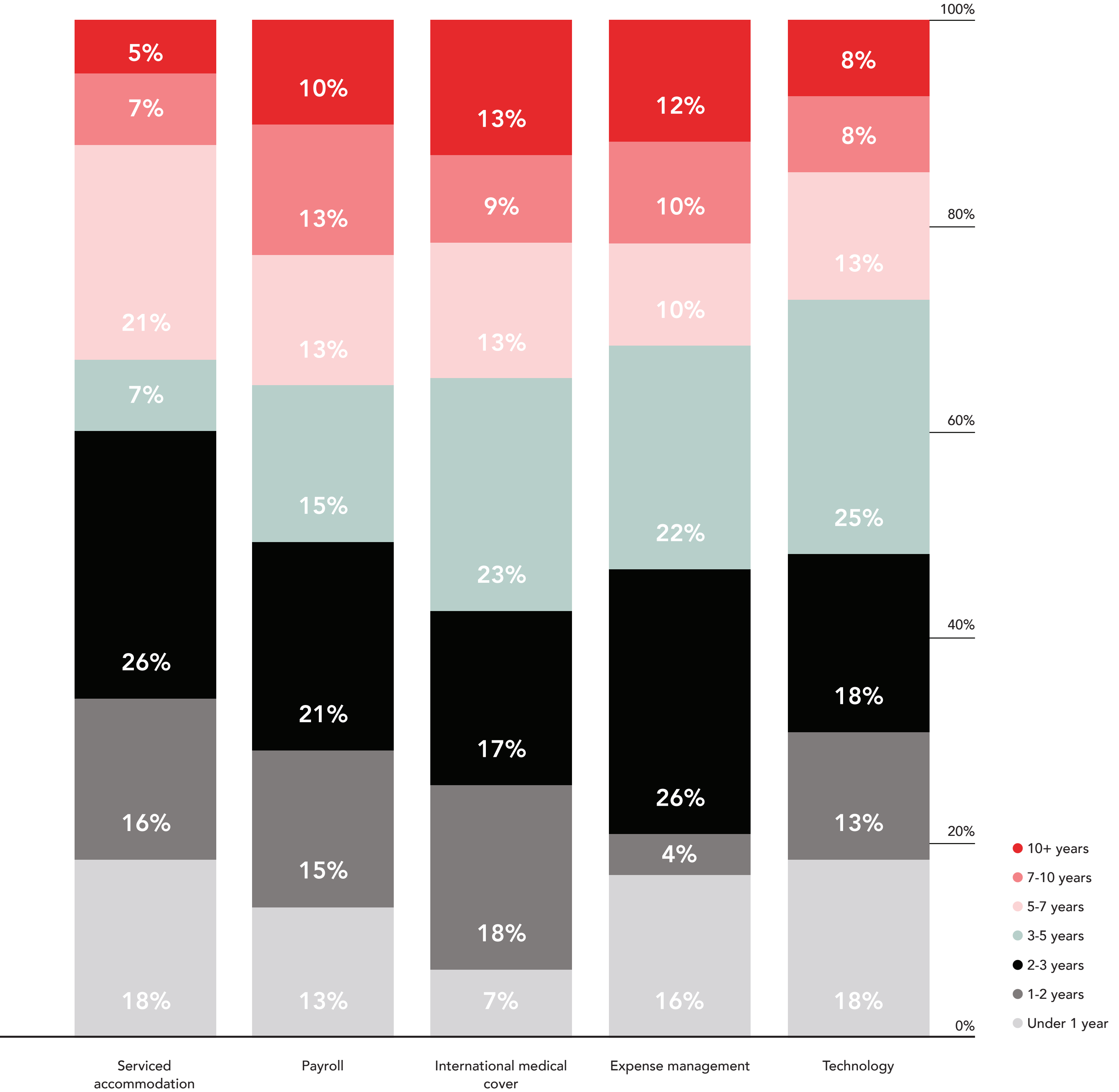
40% of survey respondents had no RFPs planned in the next 12 months. There are no significant changes in the proportion that do when compared with last year. The biggest changes were an extra 4% of respondents planned technology and serviced accommodation RFPs and the proportion of intended cost of living RFPs reduced from 10% to 3%.

How many years is it since you last switched a major service provider in the following categories?

Cost of living data continues to be the least likely service to be switched, with only 39% switching in the past five years compared with 48% last year.



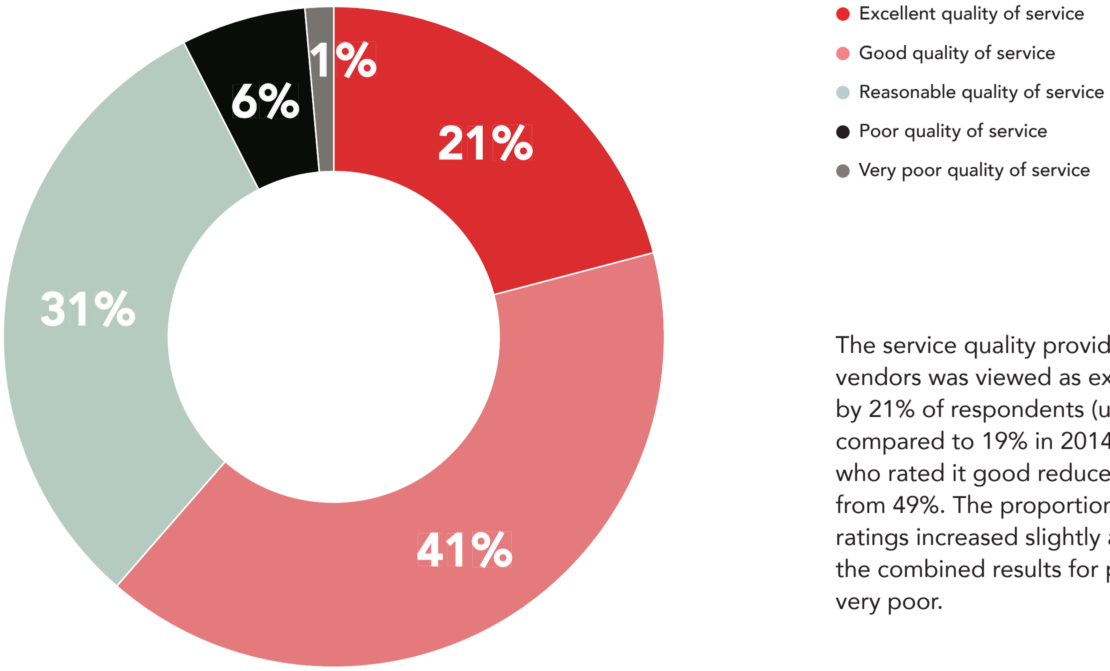
The survey also investigated when the respondents last changed their major service provider in 11 different categories: tax, immigration, assignment and vendor management, relocation/destination services, removals and household goods, cost of living data, serviced accommodation, payroll, international medical cover, expense management and technology.



This section of the survey gave an opportunity for our respondents to express their views regarding their level of satisfaction in terms of the quality of service received, value for money, professionalism and competence. The respondents were also asked whether they would recommend their current supplier to a friend in another organization.

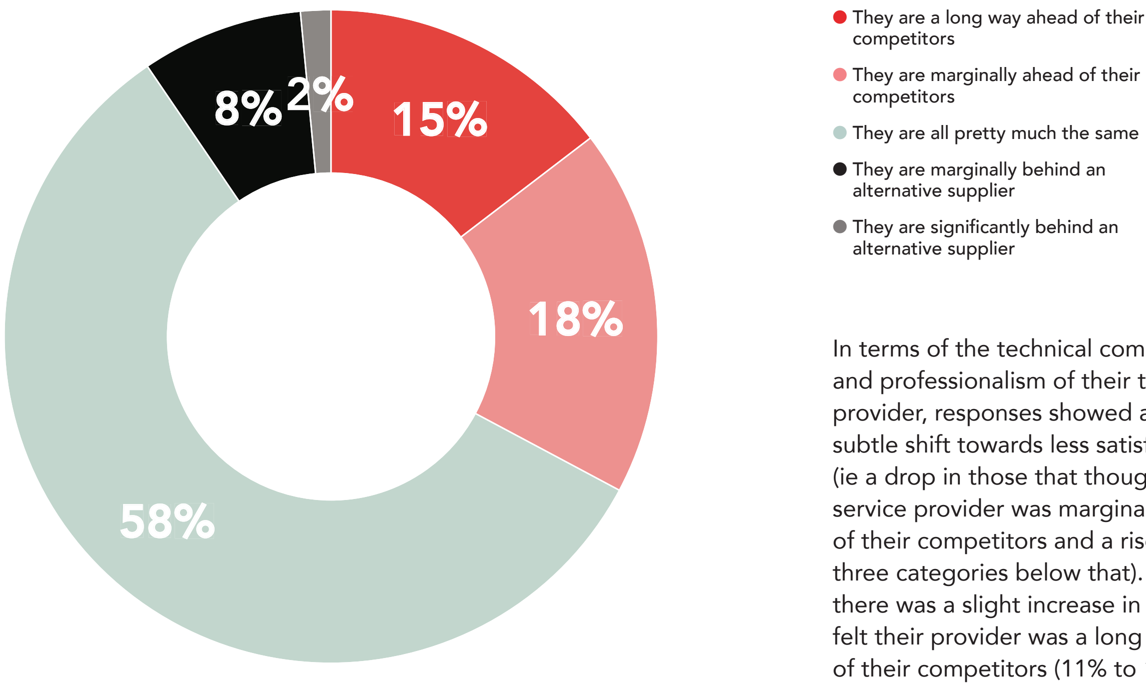
Tax

Quality of service



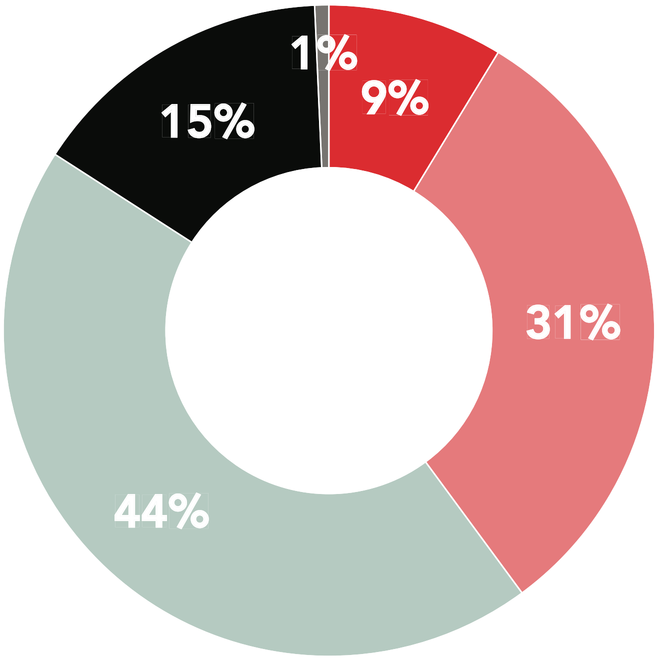
The service quality provided by tax vendors was viewed as excellent by 21% of respondents (up slightly compared to 19% in 2014). Those who rated it good reduced to 41% from 49%. The proportion of reasonable ratings increased slightly along with the combined results for poor and very poor.

Technical competence and professionalism



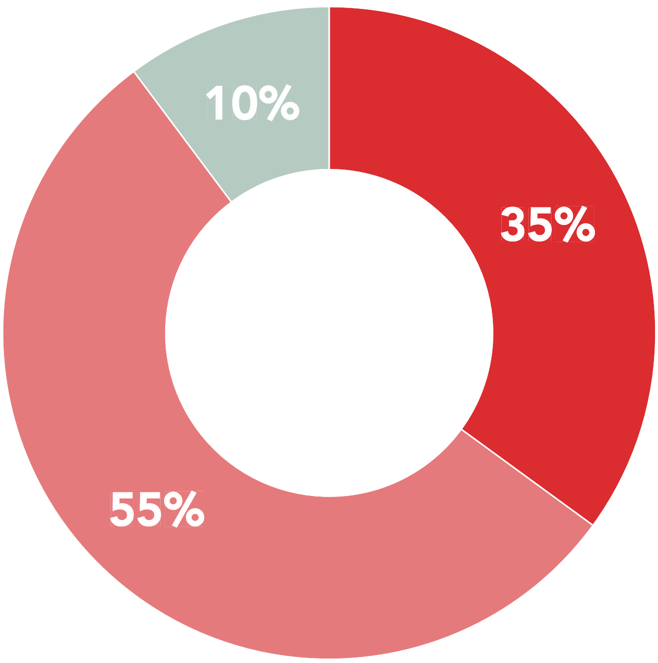
In terms of the technical competence and professionalism of their tax service provider, responses showed a continued subtle shift towards less satisfaction (ie a drop in those that thought their service provider was marginally ahead of their competitors and a rise in all three categories below that). However, there was a slight increase in those who felt their provider was a long way ahead of their competitors (11% to 15%).

Value for money



This year respondents were less likely to say they get reasonable or good value for money and more likely to say it was excellent value for money (up from 7% to 9%) or poor or very poor value for money (up from 12% to 16%) compared to last year.

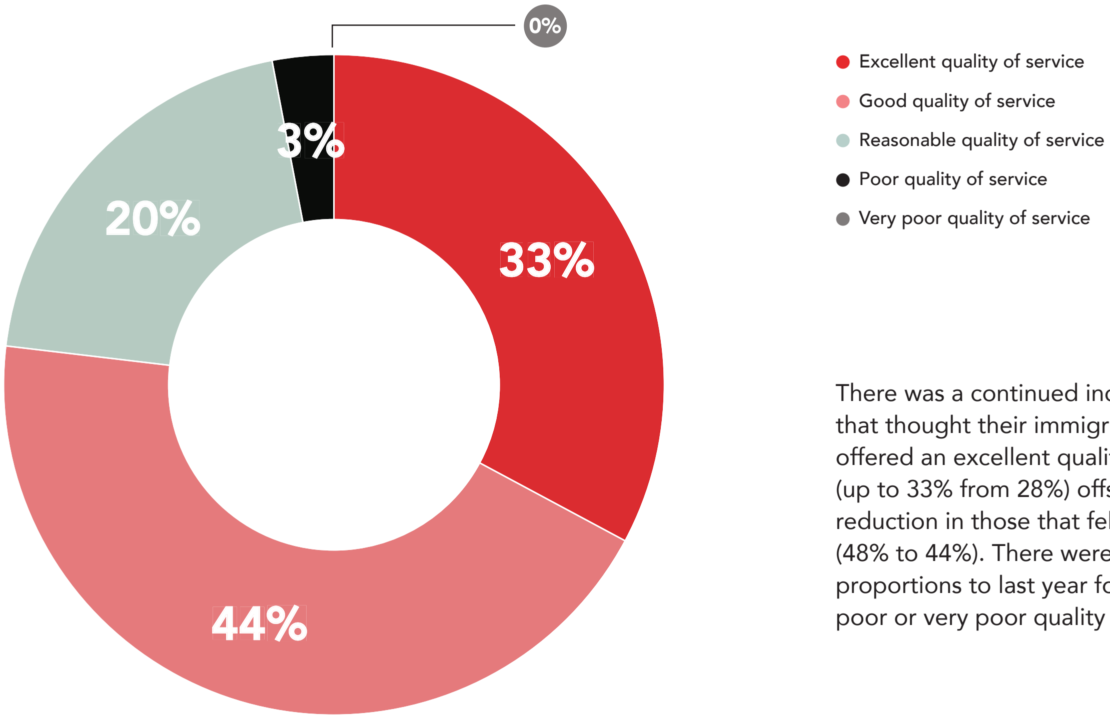
Recommendation



The extremes were not so evident when respondents were asked whether they would recommend their tax provider. Those opting for slightly recommend increased from 49% to 55% year-on-year.

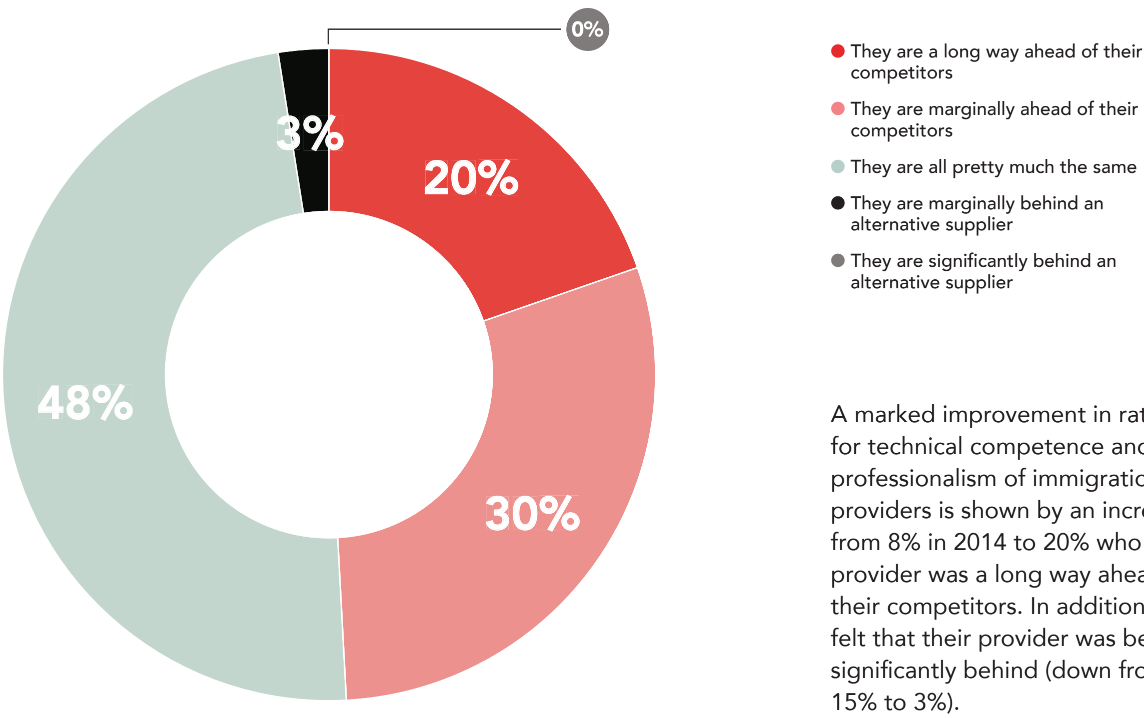
Immigration

Quality of service



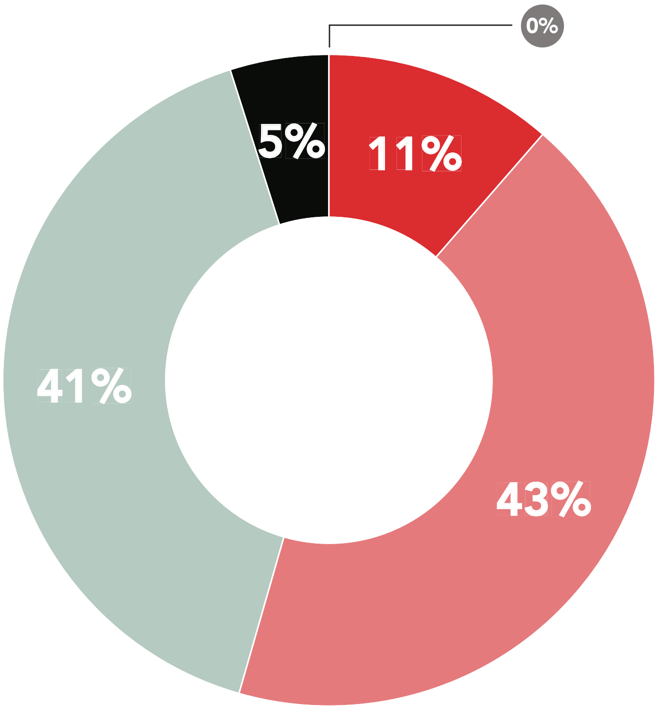
There was a continued increase in those that thought their immigration provider offered an excellent quality of service (up to 33% from 28%) offset by a reduction in those that felt it was good (48% to 44%). There were very similar proportions to last year for reasonable, poor or very poor quality of service.

Technical competence and professionalism



A marked improvement in ratings for technical competence and professionalism of immigration providers is shown by an increase from 8% in 2014 to 20% who felt their provider was a long way ahead of their competitors. In addition fewer felt that their provider was behind or significantly behind (down from 15% to 3%).

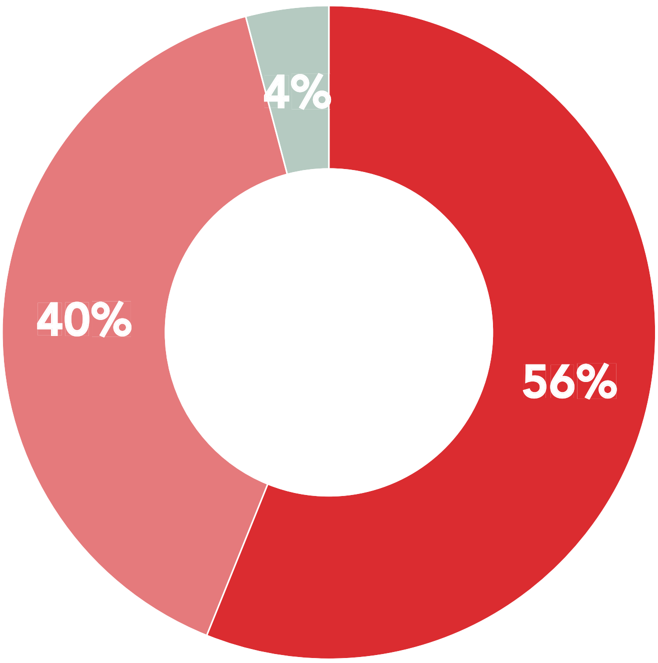
Value for money



- Excellent value for money
- Good value for money
- Reasonable value for money
- Poor value for money
- Very poor value for money

However this shift was not reflected in value for money ratings, where there was a decrease in the proportion of respondents who felt their immigration service was excellent value for money (15% to 11% year-on-year), with most of these opting for good value for money instead (up from 39% to 43%).

Recommendation

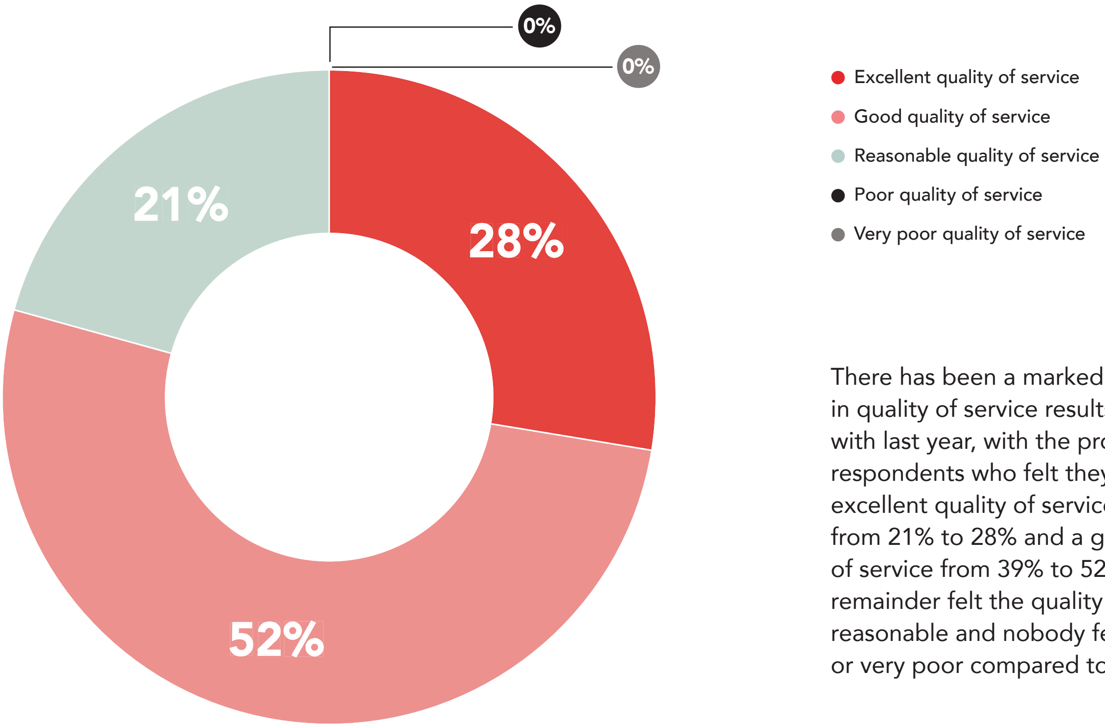


- Strongly recommend
- Slightly recommend
- Would not recommend

Perhaps the increase in satisfaction relating to quality of service and technical competence and professionalism is reflected in a subtle shift toward strongly recommending the provider (up from 51% to 56%) and a reduction to those who would not recommend (from 8% to 4%).

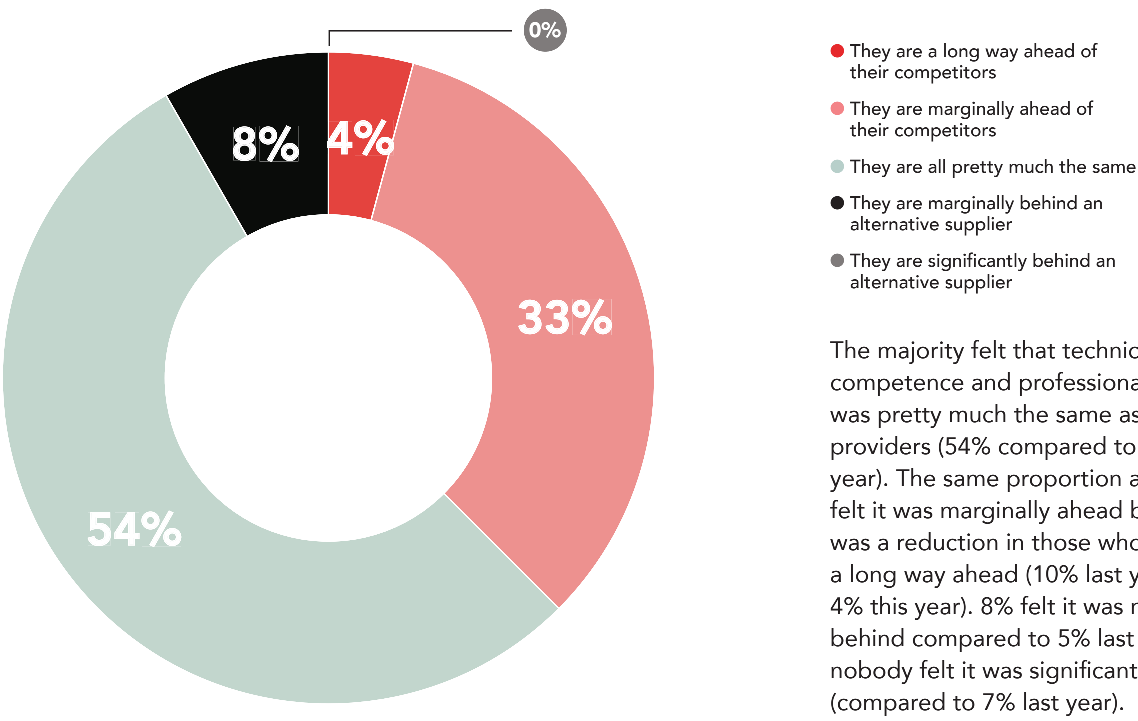
Assignment and vendor management

Quality of service



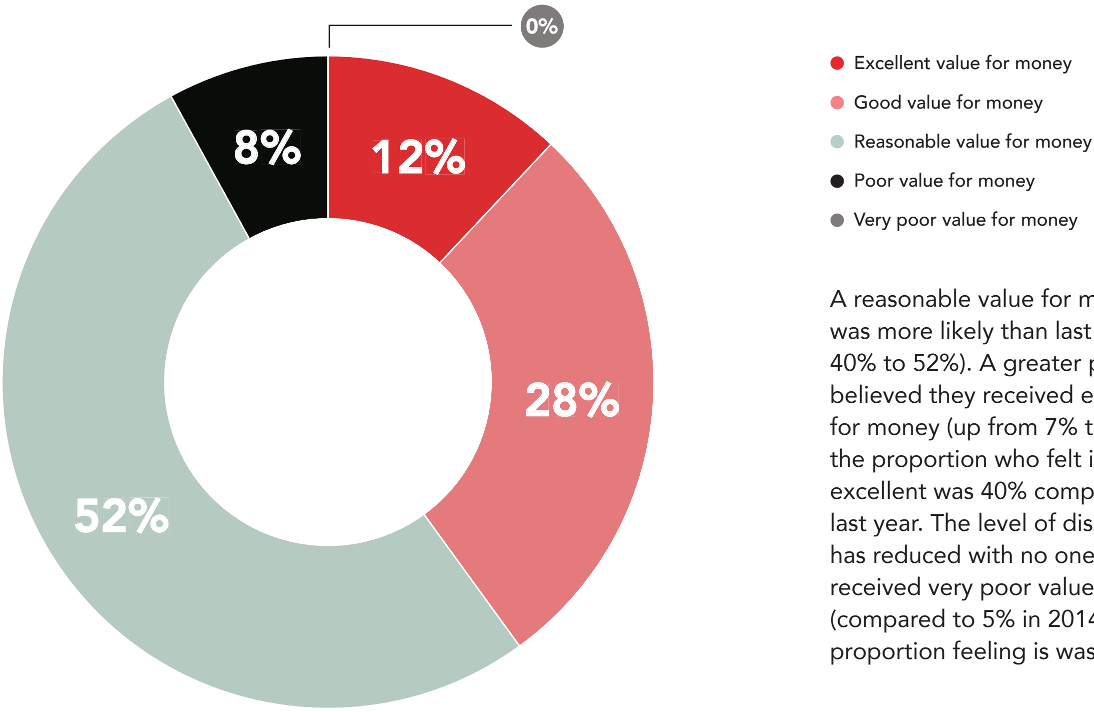
There has been a marked improvement in quality of service results compared with last year, with the proportion of respondents who felt they received an excellent quality of service increasing from 21% to 28% and a good quality of service from 39% to 52%. The remainder felt the quality of service was reasonable and nobody felt it was poor or very poor compared to 8% last year.

Technical competence and professionalism



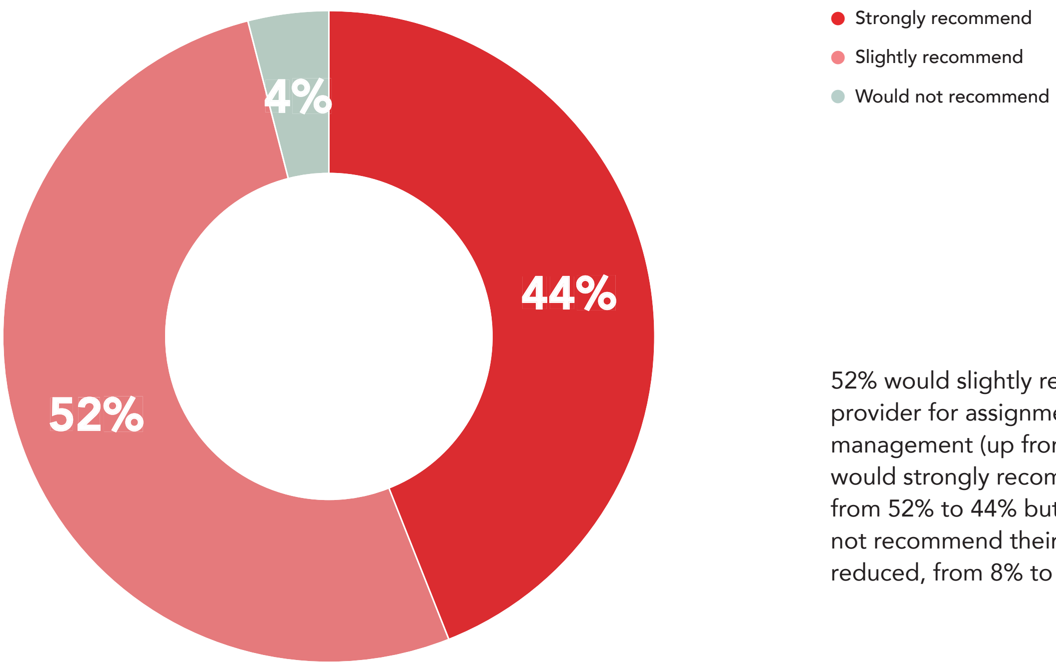
The majority felt that technical competence and professionalism was pretty much the same as other providers (54% compared to 45.2% last year). The same proportion as last year felt it was marginally ahead but there was a reduction in those who felt it was a long way ahead (10% last year and 4% this year). 8% felt it was marginally behind compared to 5% last year but nobody felt it was significantly behind (compared to 7% last year).

Value for money



A reasonable value for money rating was more likely than last year (up from 40% to 52%). A greater proportion believed they received excellent value for money (up from 7% to 12%), but the proportion who felt it was good or excellent was 40% compared to 47% last year. The level of dissatisfaction has reduced with no one feeling they received very poor value for money (compared to 5% in 2014) and a similar proportion feeling is was poor.

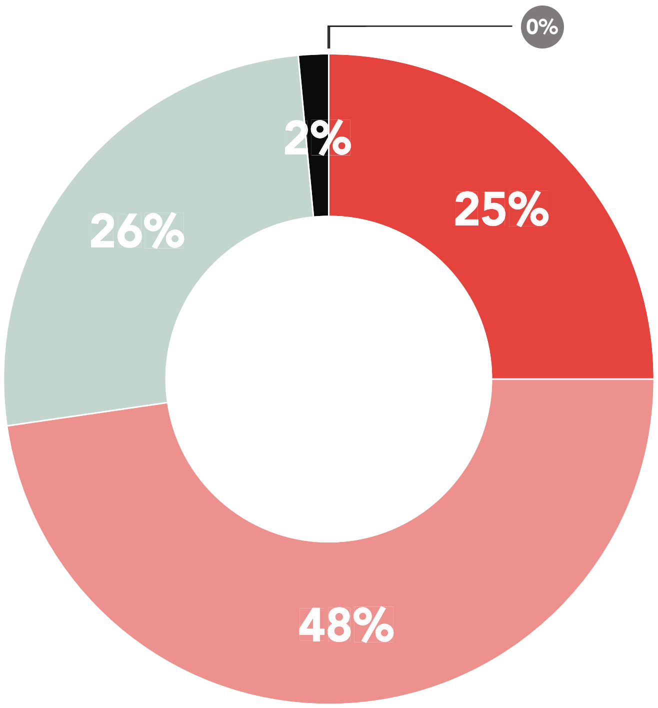
Recommendation



52% would slightly recommend their provider for assignment and vendor management (up from 40%). Those who would strongly recommend reduced from 52% to 44% but those who would not recommend their provider also reduced, from 8% to 4%.

Relocation/destination services

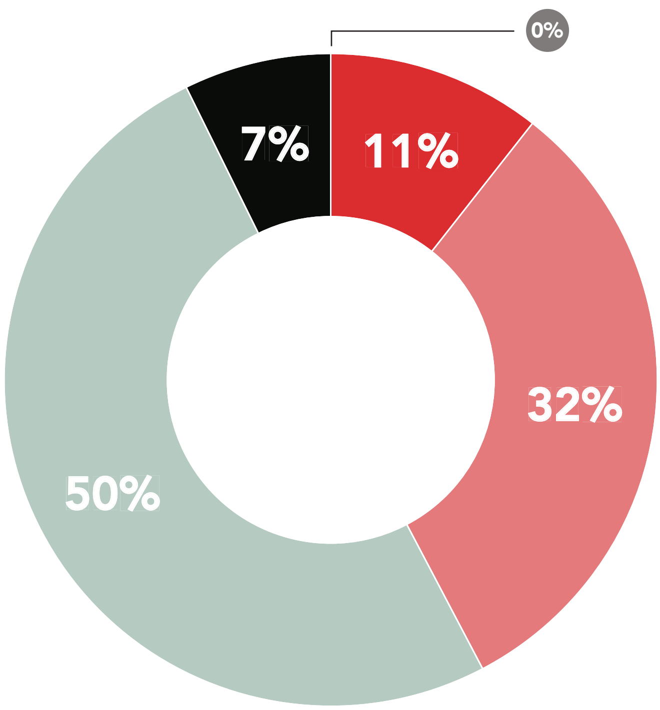
Quality of service



- Excellent quality of service
- Good quality of service
- Reasonable quality of service
- Poor quality of service
- Very poor quality of service

There has been an increase in the number of respondents that believe their relocation/destination service providers offer an excellent quality of client service (17.3% to 25%). The numbers of those less satisfied has also reduced. Those who felt it was poor or very poor reduced from 5% to 2% and those who felt it was reasonable reduced from 30% to 26%.

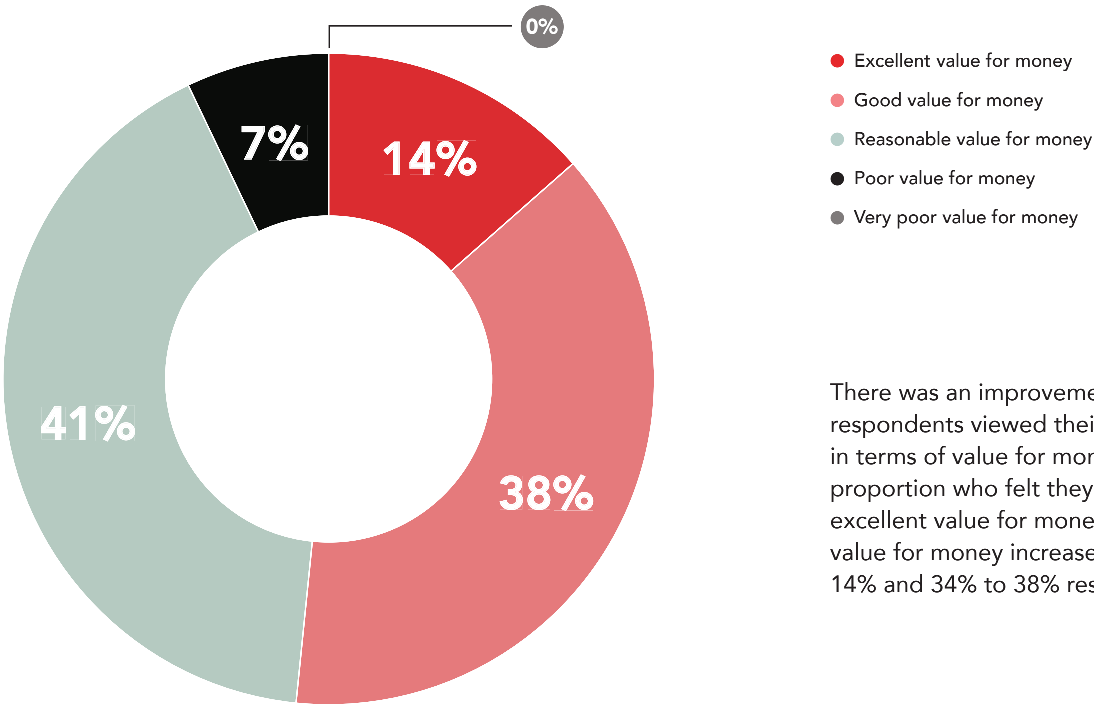
Technical competence and professionalism



- They are a long way ahead of their competitors
- They are marginally ahead of their competitors
- They are all pretty much the same
- They are marginally behind an alternative supplier
- They are significantly behind an alternative supplier

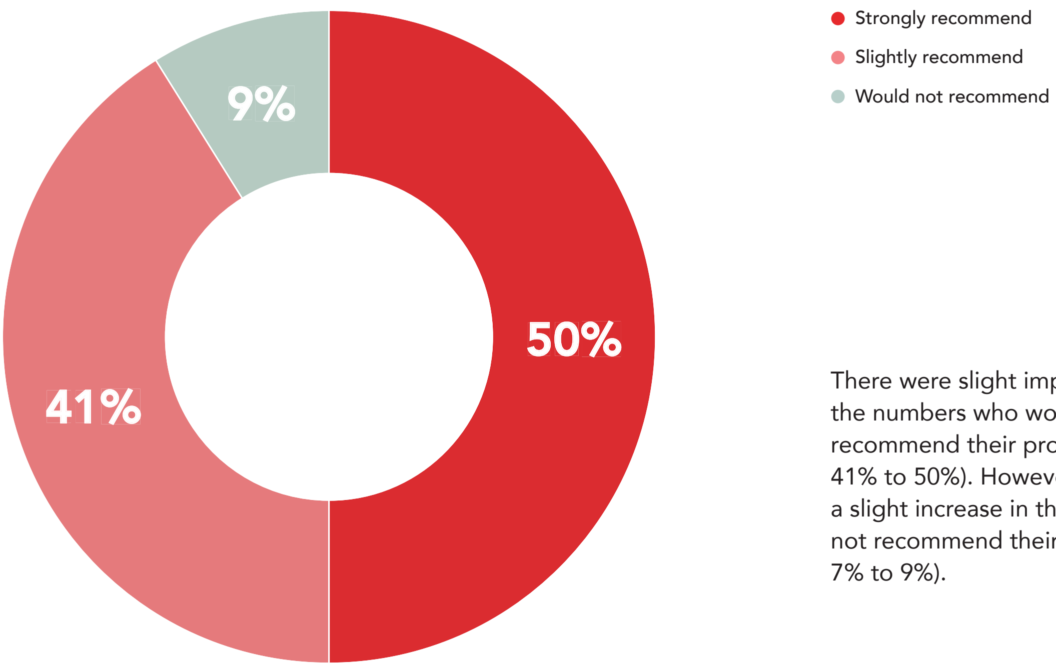
There has been little change in how respondents view their relocation/destination service provider for technical competence and professionalism.

Value for money



There was an improvement in how the respondents viewed their provider in terms of value for money. The proportion who felt they received excellent value for money and good value for money increased from 8% to 14% and 34% to 38% respectively.

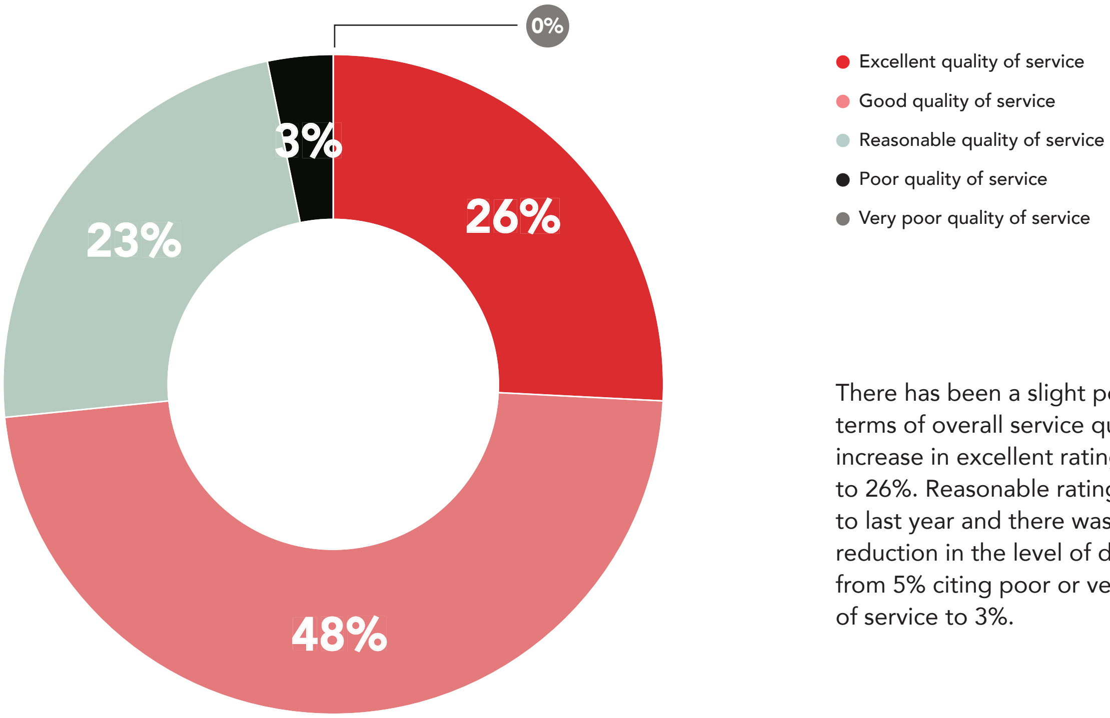
Recommendation



There were slight improvements in the numbers who would strongly recommend their provider (up from 41% to 50%). However there was also a slight increase in those who would not recommend their provider (up from 7% to 9%).

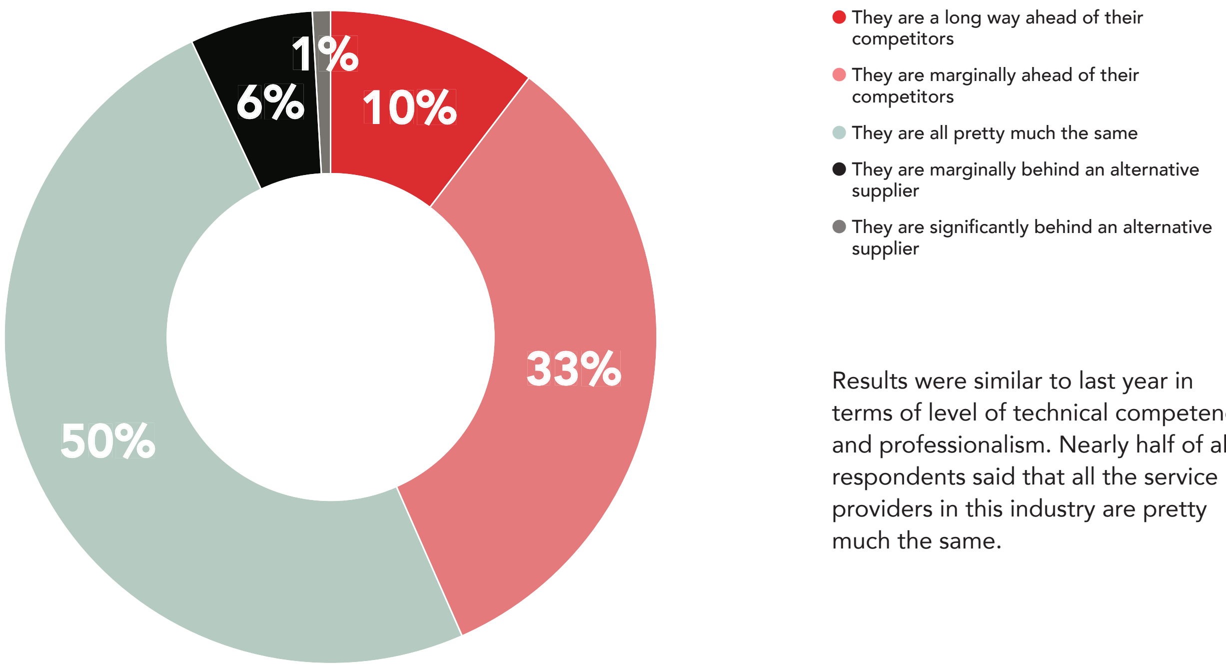
Removals and household goods

Quality of service



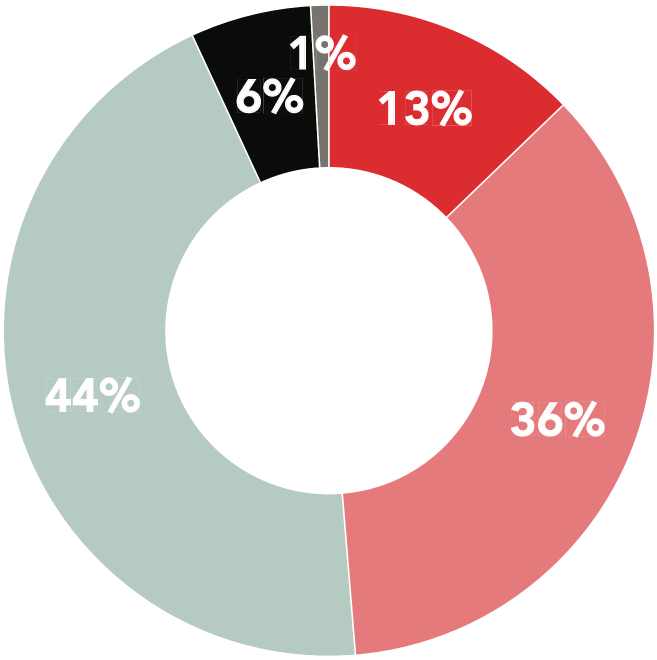
There has been a slight positive shift in terms of overall service quality, with an increase in excellent ratings from 21% to 26%. Reasonable ratings were similar to last year and there was a slight reduction in the level of dissatisfaction, from 5% citing poor or very poor quality of service to 3%.

Technical competence and professionalism



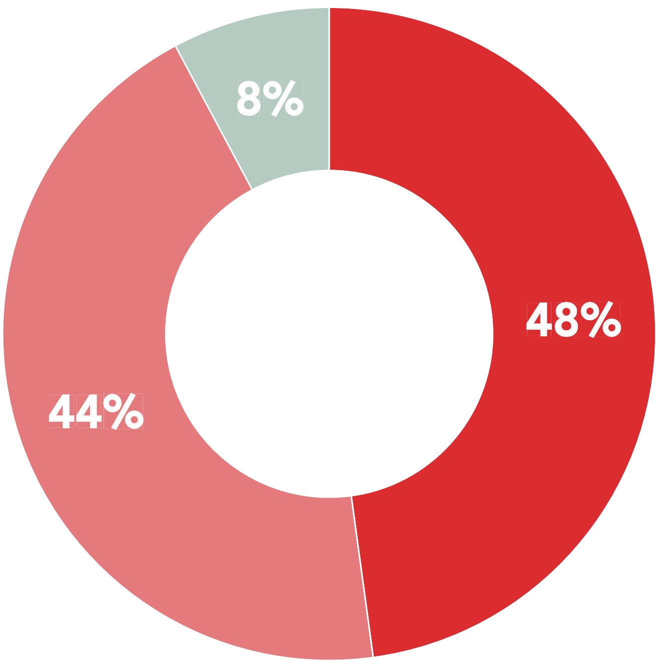
Results were similar to last year in terms of level of technical competence and professionalism. Nearly half of all respondents said that all the service providers in this industry are pretty much the same.

Value for money



The proportion of respondents who felt they received reasonable value for money was similar to last year. There was a slight increase in those who felt it was excellent (8% to 13%) and those who felt it was poor or very poor (5% to 7%).

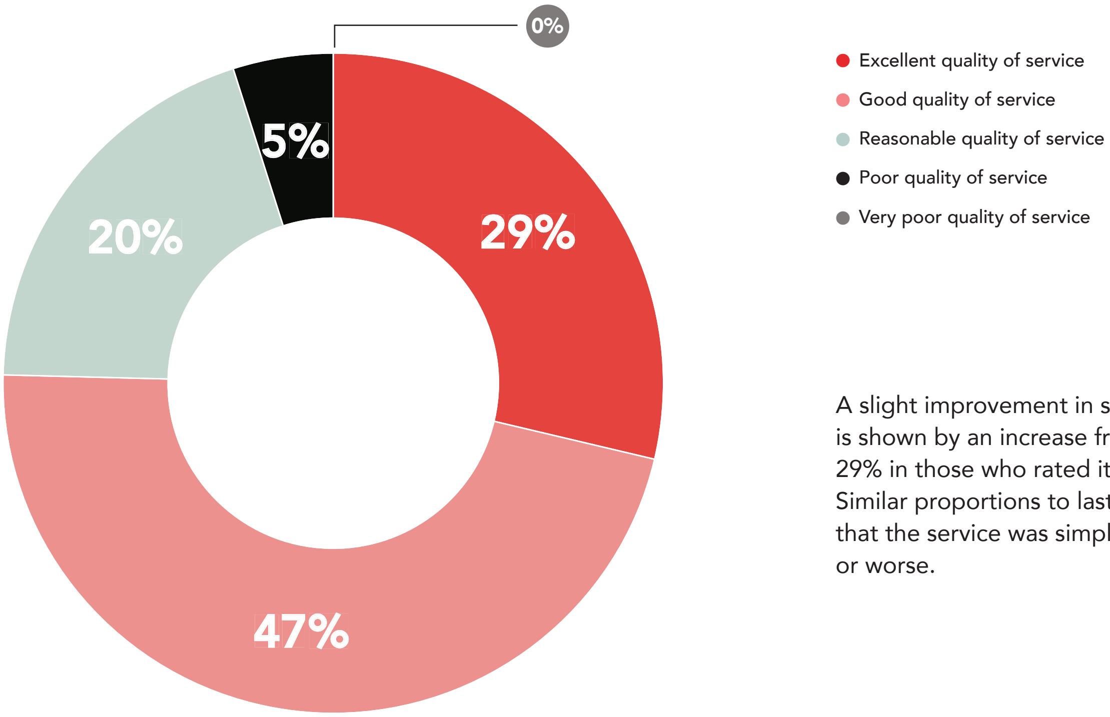
Recommendation



There was a slight increase in the number who would strongly recommend and those who would not recommend their removals and household goods provider (up from 45% to 48% and 6% to 8% respectively).

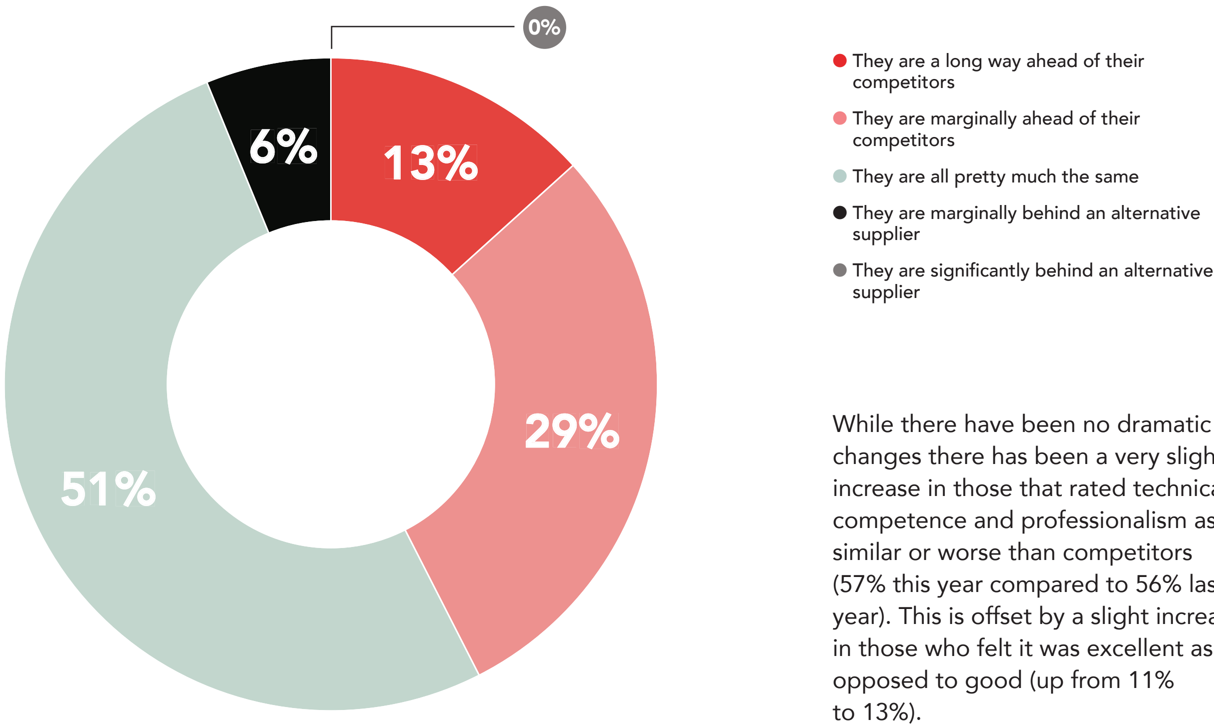
Cost of living data

Quality of service



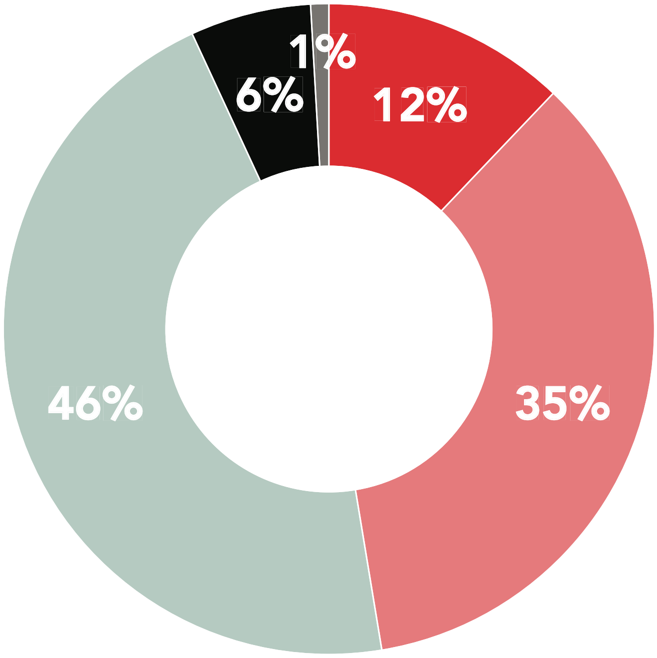
A slight improvement in service quality is shown by an increase from 22% to 29% in those who rated it excellent. Similar proportions to last year felt that the service was simply reasonable or worse.

Technical competence and professionalism



While there have been no dramatic changes there has been a very slight increase in those that rated technical competence and professionalism as similar or worse than competitors (57% this year compared to 56% last year). This is offset by a slight increase in those who felt it was excellent as opposed to good (up from 11% to 13%).

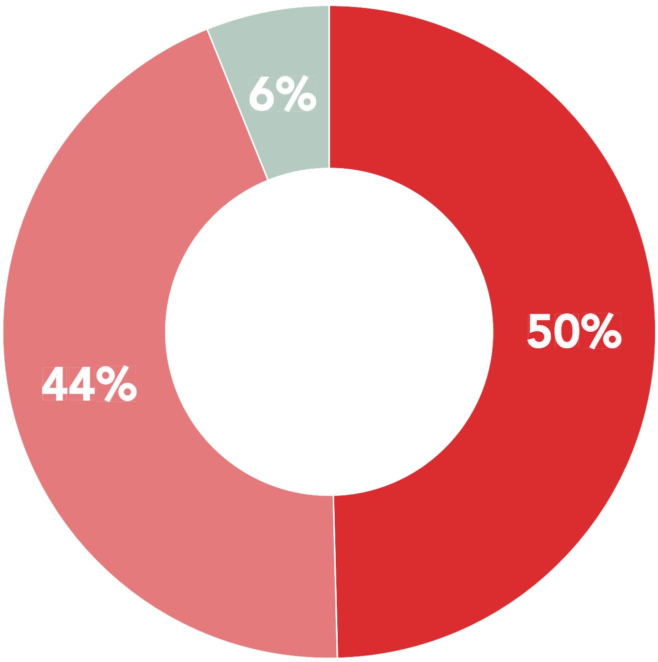
Value for Money



- Excellent value for money
- Good value for money
- Reasonable value for money
- Poor value for money
- Very poor value for money

Again, similar results to last year but with an increase in excellent ratings offset by a slight reduction in good and reasonable ratings.

Recommendation

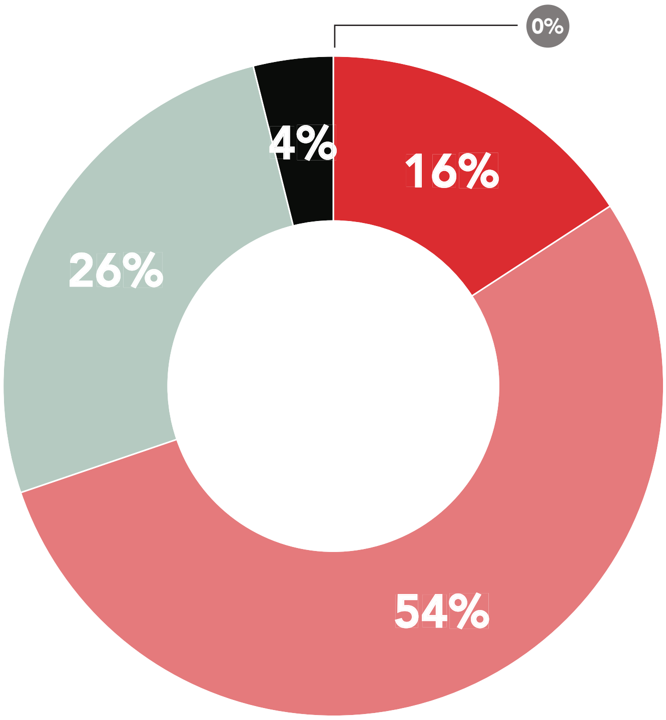


- Strongly recommend
- Slightly recommend
- Would not recommend

This slight improvement continues to be reflected in the respondent's willingness to recommend their provider. Whereas there was an equal split of slightly and strongly recommends last year (both at 47%) this has shifted more towards strongly recommend (50% this year).

Serviced accommodation

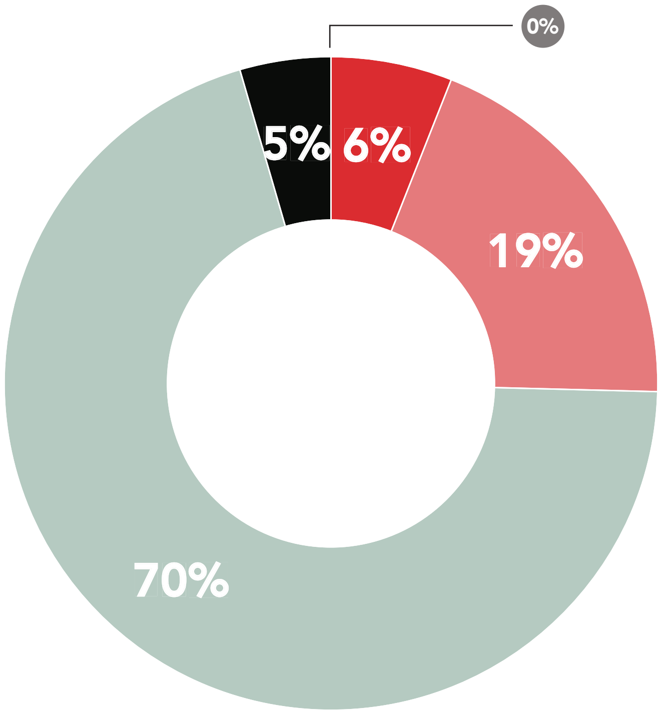
Quality of service



- Excellent quality of service
- Good quality of service
- Reasonable quality of service
- Poor quality of service
- Very poor quality of service

Those that viewed the quality of service as good rose from 43% in 2014 to 54% this year. While 8% had viewed it as very poor or poor quality last year, this reduced to 4% in 2015.

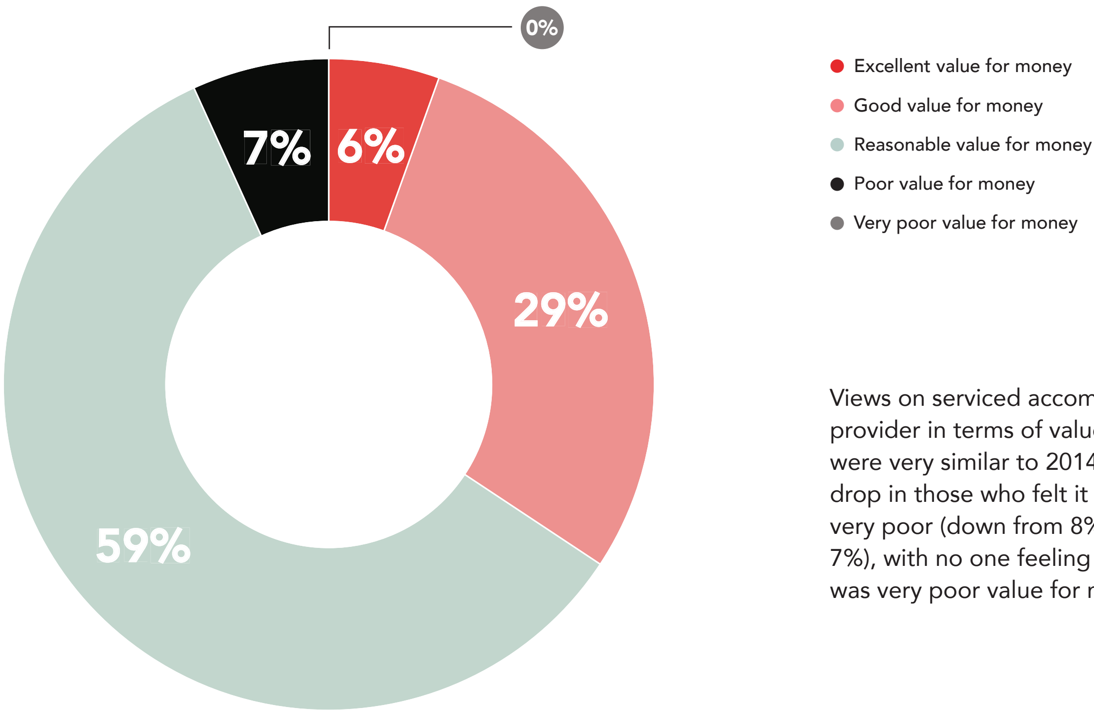
Technical competence and professionalism



- They are a long way ahead of their competitors
- They are marginally ahead of their competitors
- They are all pretty much the same
- They are marginally behind an alternative supplier
- They are significantly behind an alternative supplier

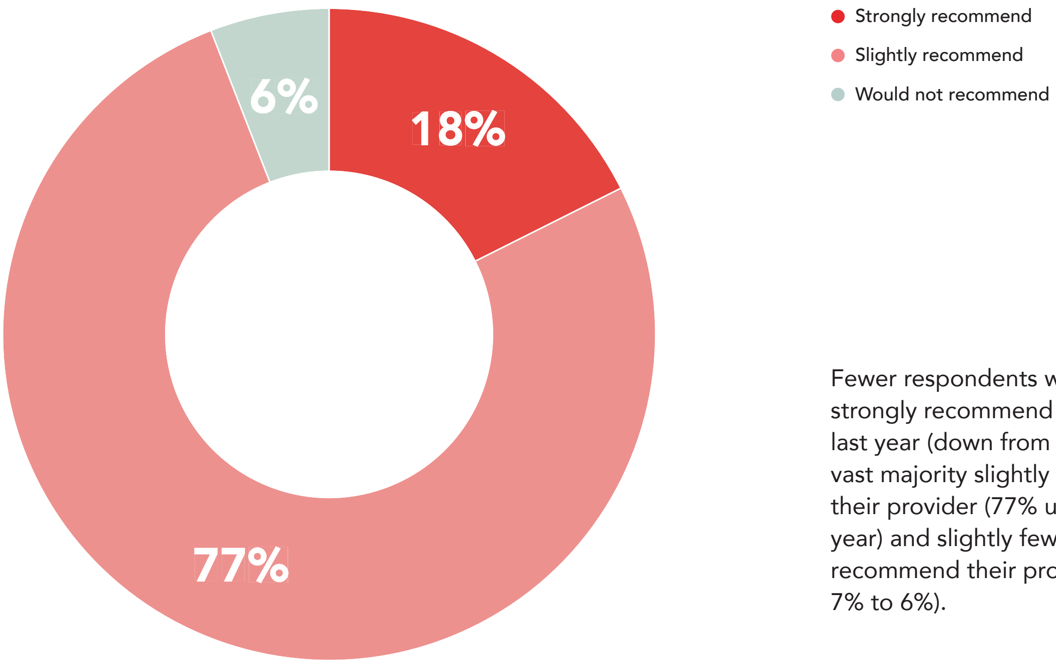
Over 70% of respondents thought that their serviced accommodation provider was pretty much the same as its competitors (an increase from 57% last year). 19% thought their service provider was marginally ahead of its competitors (a reduction from 31% last year).

Value for money



Views on serviced accommodation provider in terms of value for money were very similar to 2014, with a small drop in those who felt it was poor or very poor (down from 8% in 2014 to 7%), with no one feeling that the service was very poor value for money.

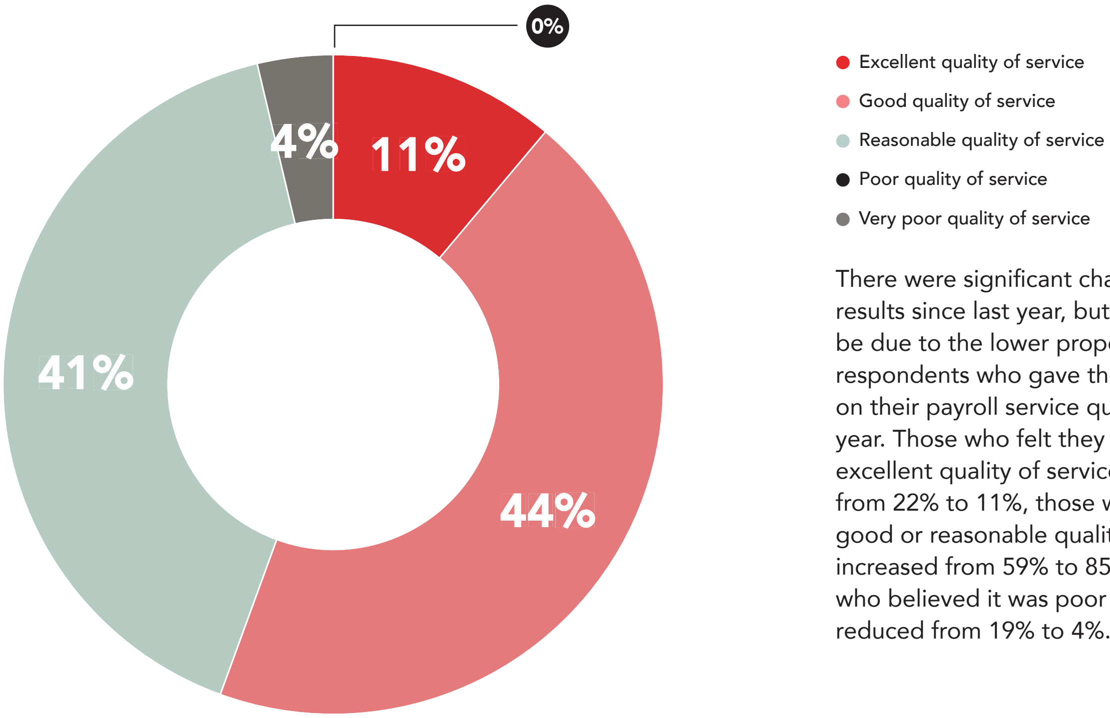
Recommendation



Fewer respondents were happy to strongly recommend their provider than last year (down from 29% to 18%). The vast majority slightly recommended their provider (77% up from 64% last year) and slightly fewer would not recommend their provider (down from 7% to 6%).

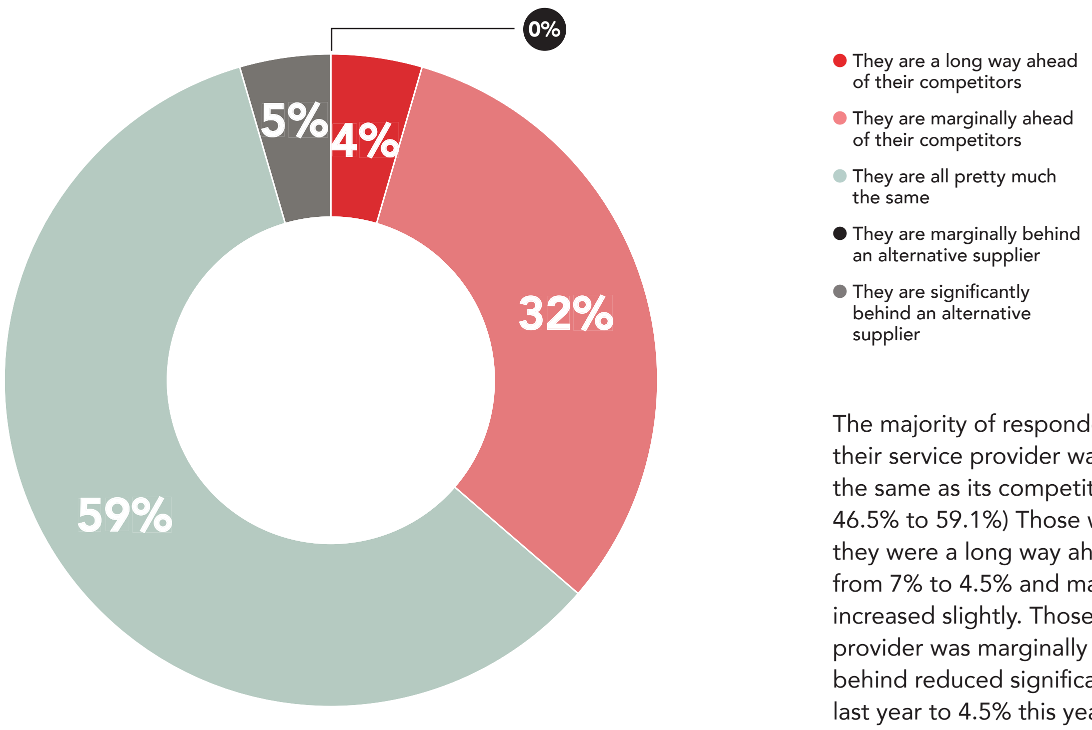
Payroll

Quality of service



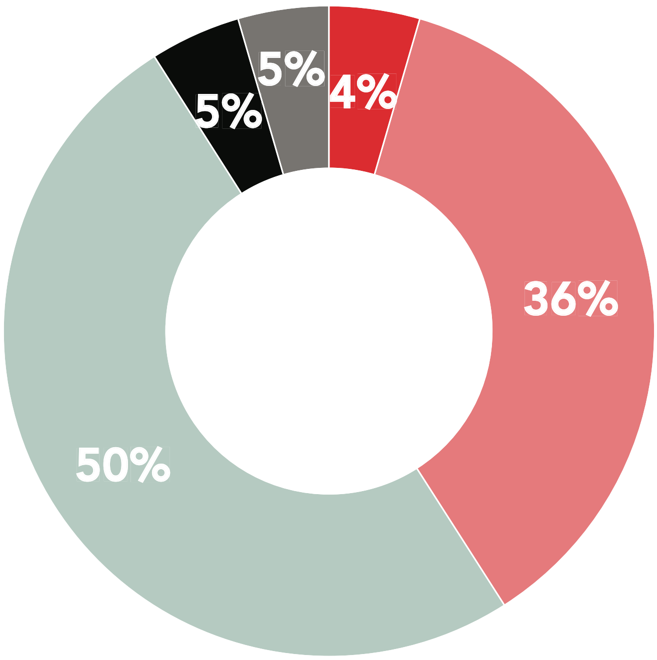
There were significant changes in results since last year, but this may be due to the lower proportion of respondents who gave their opinion on their payroll service quality this year. Those who felt they received an excellent quality of service reduced from 22% to 11%, those who felt it was good or reasonable quality of service increased from 59% to 85% and those who believed it was poor or very poor reduced from 19% to 4%.

Technical competence and professionalism



The majority of respondents felt that their service provider was pretty much the same as its competitors (up from 46.5% to 59.1%) Those who believed they were a long way ahead reduced from 7% to 4.5% and marginally ahead increased slightly. Those who felt their provider was marginally or significantly behind reduced significantly from 18.6% last year to 4.5% this year.

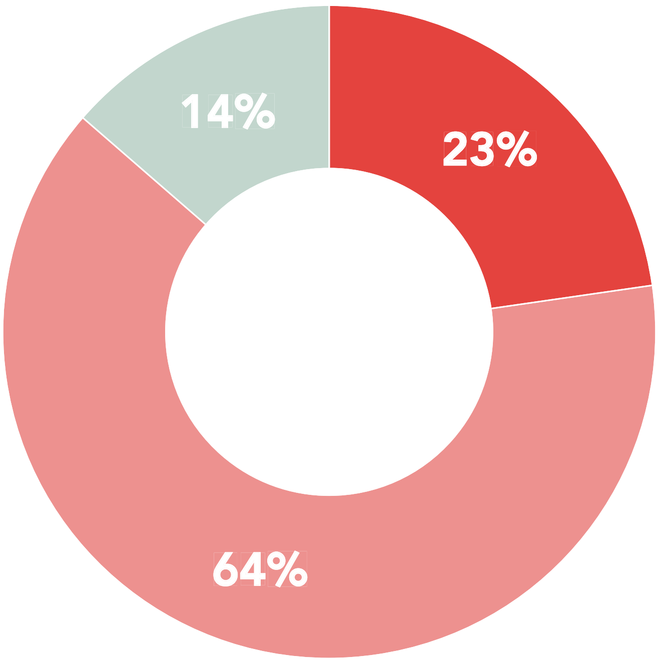
Value for money



- Excellent value for money
- Good value for money
- Reasonable value for money
- Poor value for money
- Very poor value for money

Value for money results improved, with 41% believing they received excellent or good value for money (up from 33% last year). Poor or very poor value for money reducing from 15% to 9%.

Recommendation

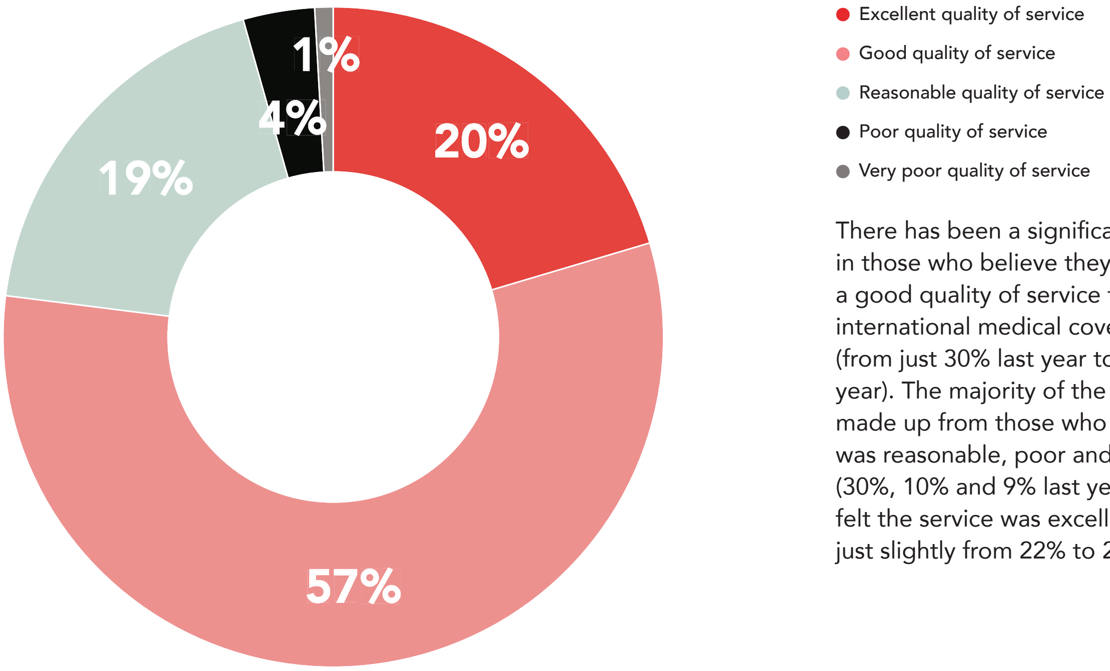


- Strongly recommend
- Slightly recommend
- Would not recommend

Those happy to recommend their provider increased this year. Strongly recommend responses increased from 17% to 23% and slightly recommend responses increased from 62% to 64%. The proportion who would not recommend their provider reduced from 21% to 14%.

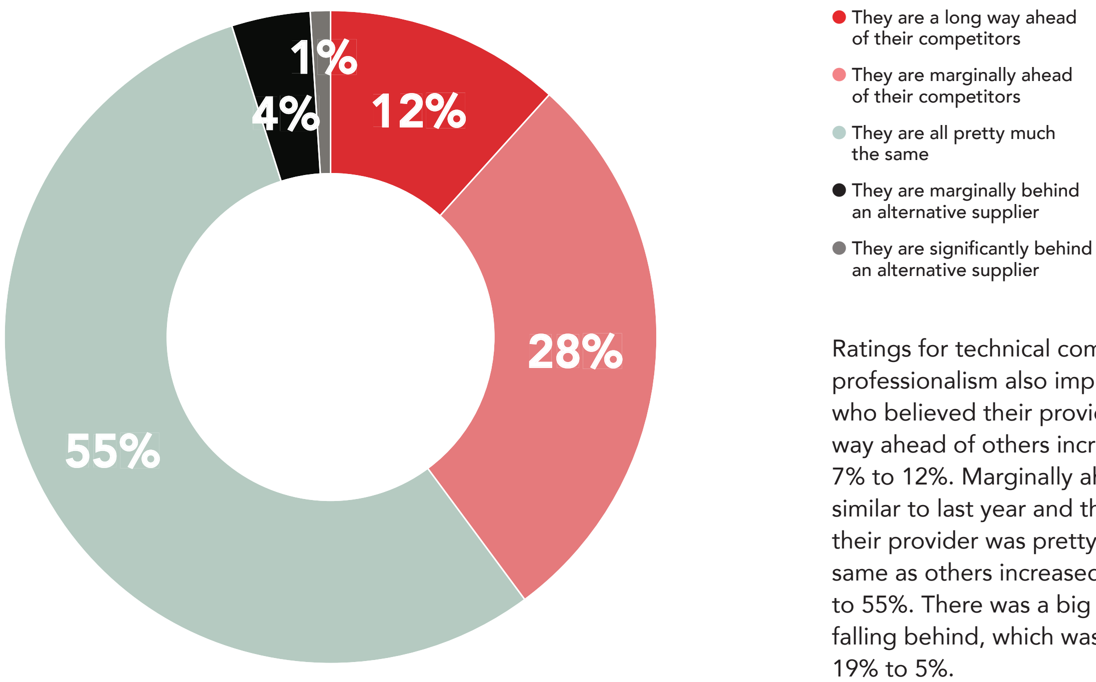
International medical cover

Quality of service



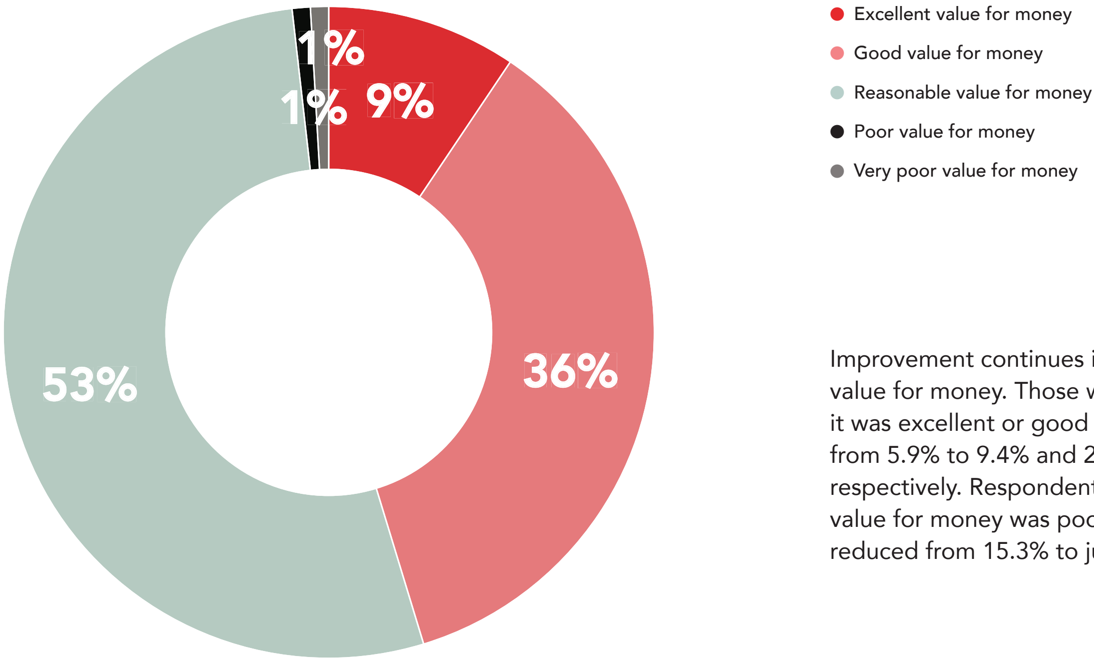
There has been a significant increase in those who believe they receive a good quality of service from their international medical cover provider (from just 30% last year to 57% this year). The majority of the increase was made up from those who felt the quality was reasonable, poor and very poor (30%, 10% and 9% last year).Those who felt the service was excellent dropped just slightly from 22% to 20%.

Technical competence and professionalism



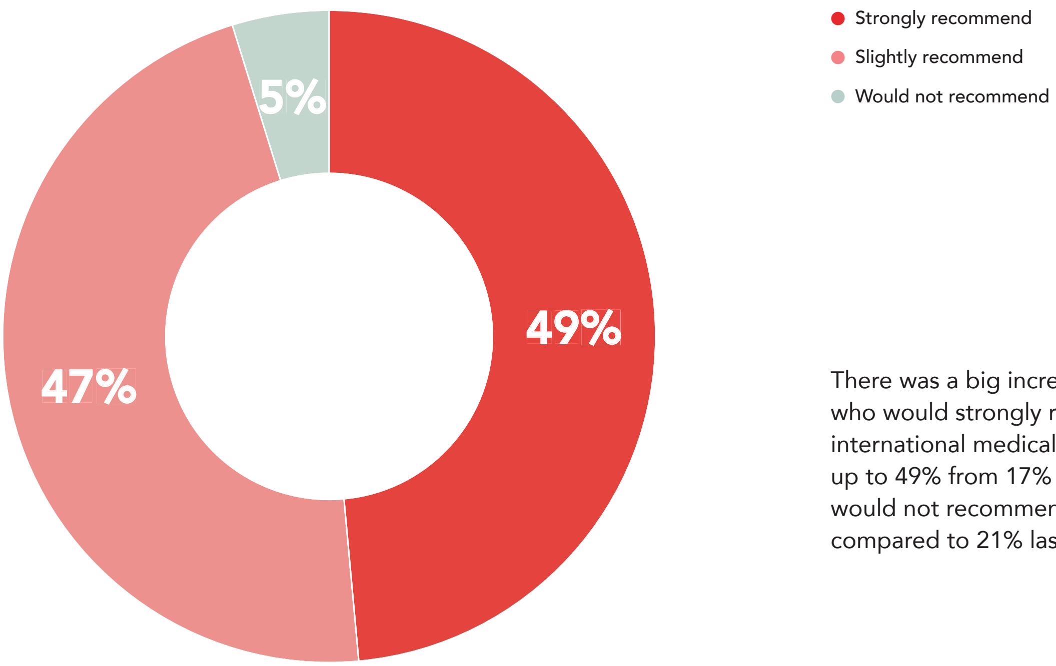
Ratings for technical competence and professionalism also improved. Those who believed their provider was a long way ahead of others increased from 7% to 12%. Marginally ahead remained similar to last year and those believing their provider was pretty much the same as others increased from 47% to 55%. There was a big drop in those falling behind, which was down from 19% to 5%.

Value for money



Improvement continues in terms of value for money. Those who believed it was excellent or good increased from 5.9% to 9.4% and 27.1% to 35.8% respectively. Respondents who felt value for money was poor or very poor reduced from 15.3% to just 1.8%.

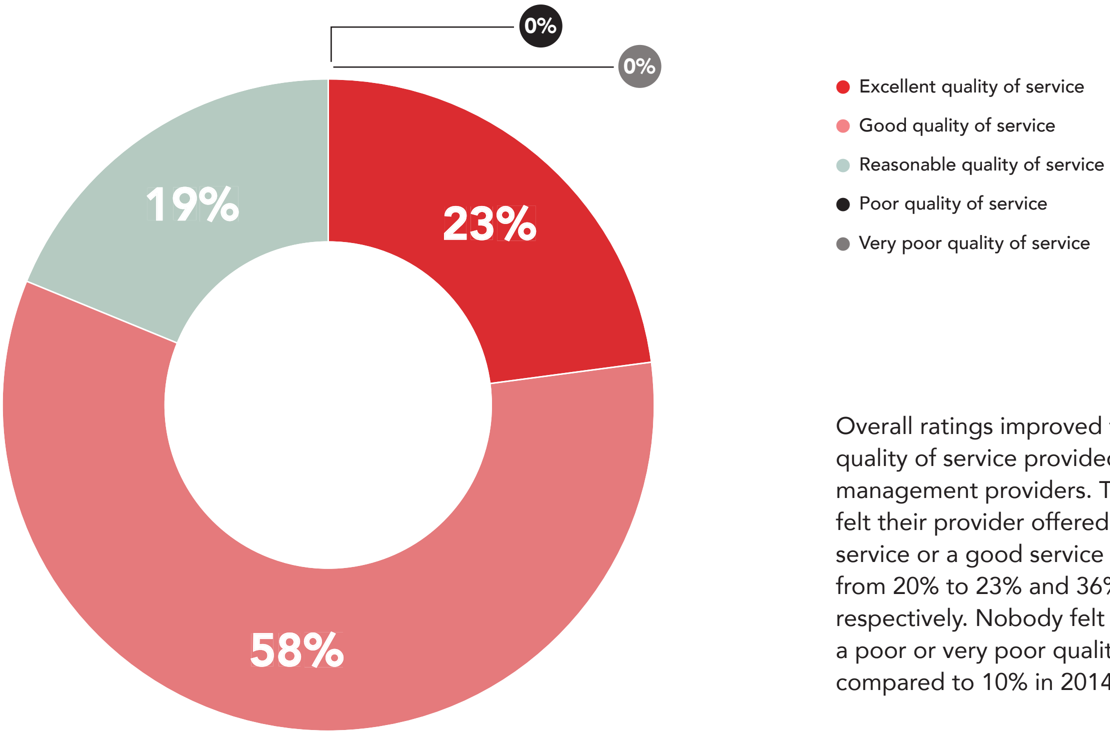
Recommendation



There was a big increase in those who would strongly recommend their international medical cover provider, up to 49% from 17% last year. Only 5% would not recommend their provider compared to 21% last year.

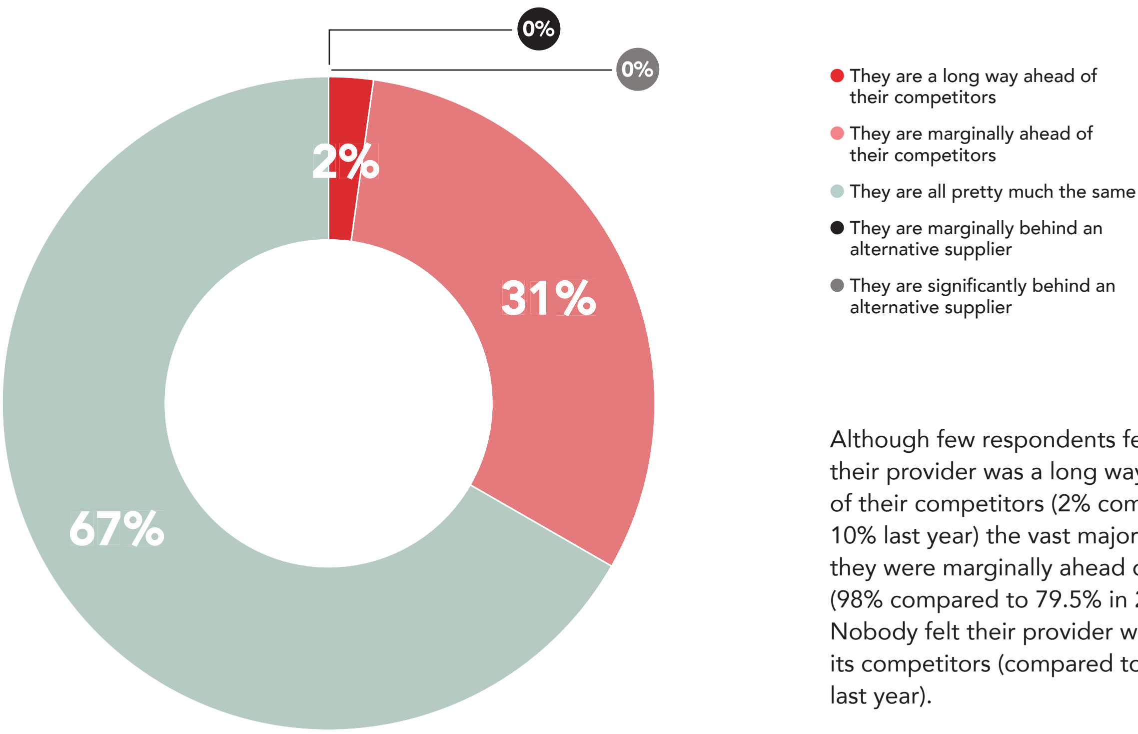
Expense management

Quality of service



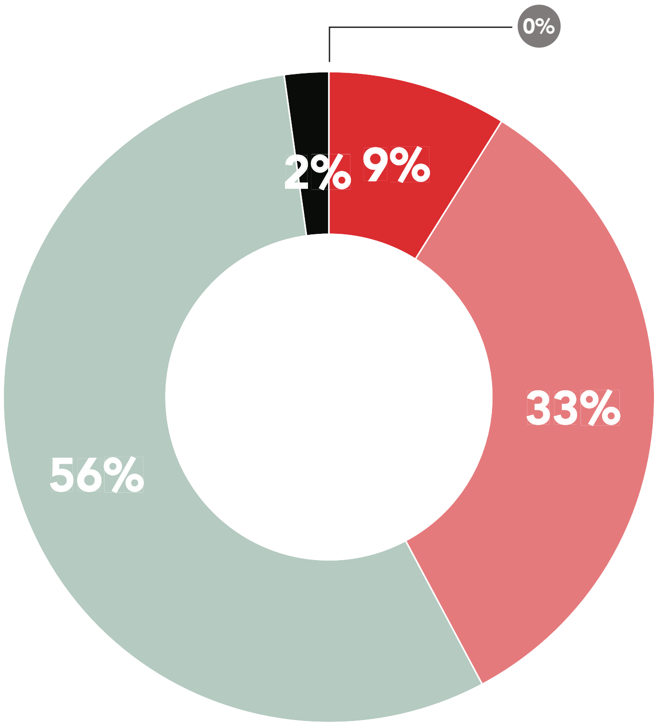
Overall ratings improved for the quality of service provided by expense management providers. Those who felt their provider offered an excellent service or a good service increased from 20% to 23% and 36% to 58% respectively. Nobody felt they received a poor or very poor quality of service, compared to 10% in 2014.

Technical competence and professionalism



Although few respondents felt that their provider was a long way ahead of their competitors (2% compared to 10% last year) the vast majority felt that they were marginally ahead or the same (98% compared to 79.5% in 2014). Nobody felt their provider was behind its competitors (compared to 10% last year).

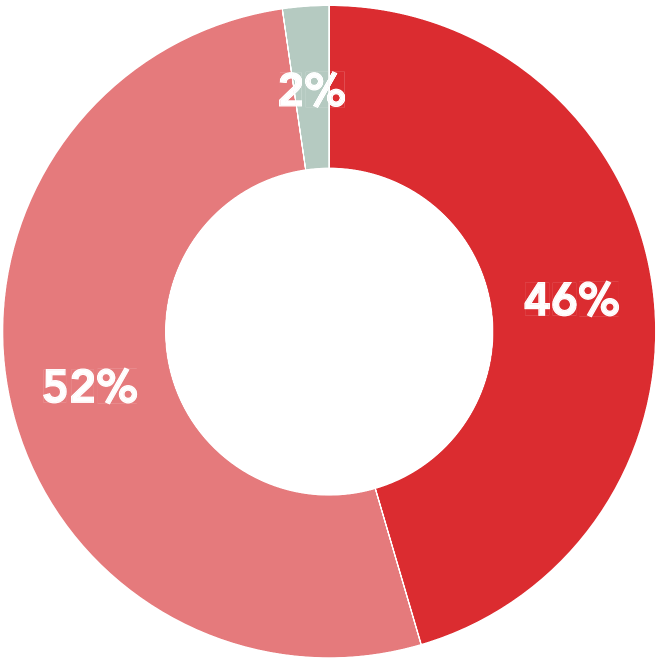
Value for money



- Excellent value for money
- Good value for money
- Reasonable value for money
- Poor value for money
- Very poor value for money

9% believed their expense management provider offered excellent value for money (up from 5%). A very similar proportion to last year felt it was good value for money. Over half felt it was reasonable value for money with only 2% rating it as poor or very poor (compared to 16% last year).

Recommendation

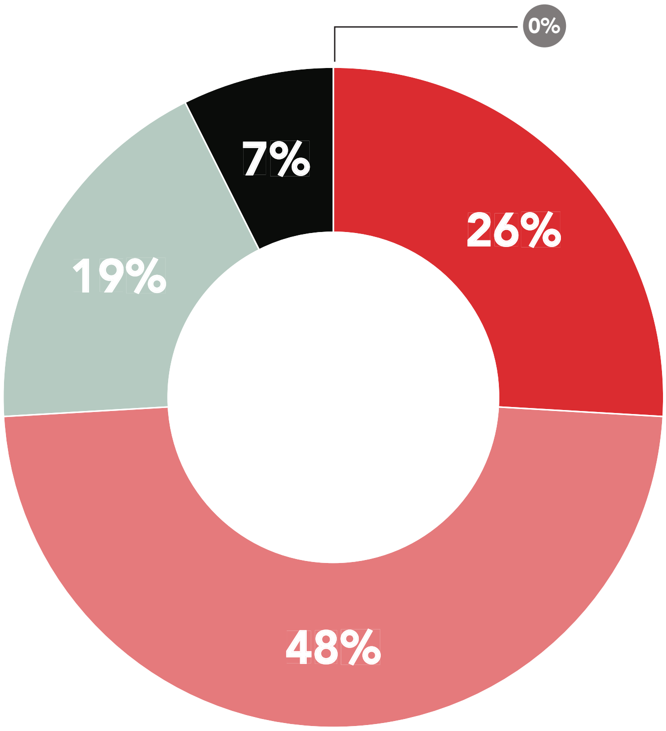


- Strongly recommend
- Slightly recommend
- Would not recommend

Those happy to strongly recommend their provider increased significantly from 27% in 2014 to 46% in 2015. Only 2% would not recommend their expense management provider compared to 12% last year.

Technology

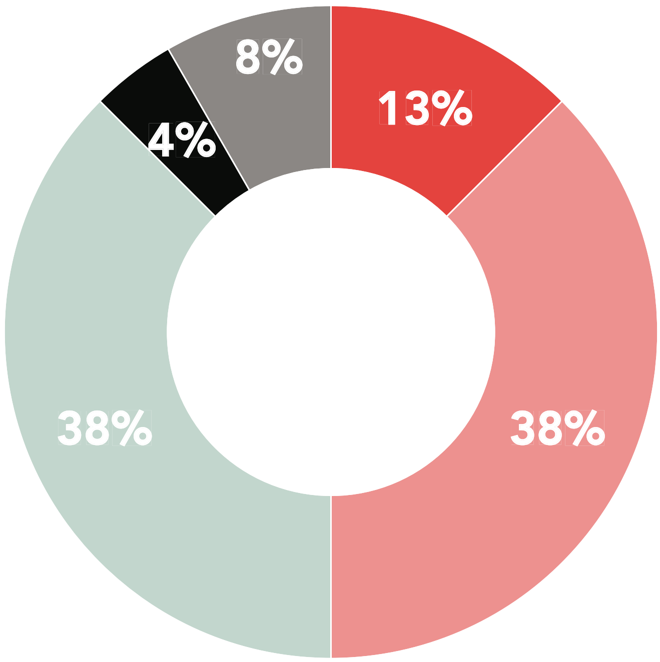
Quality of service



- Excellent quality of service
- Good quality of service
- Reasonable quality of service
- Poor quality of service
- Very poor quality of service

The quality of service from technology providers continued to improve as those respondents rating the service as excellent increased from 9% in 2013 to 21% in 2014 and 26% this year. Those rating the service as good increased from 33% to 48%. Although the overall proportion rating the service as poor or very poor did not change significantly (9% to 7%), this included a high percentage of very poor ratings last year.

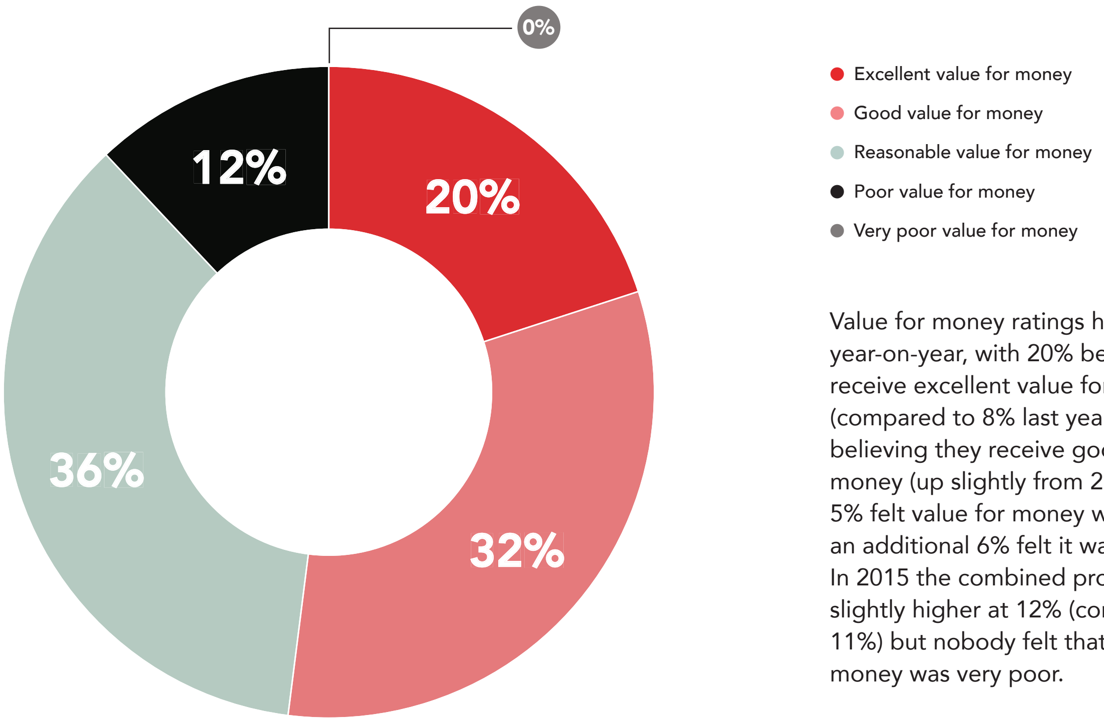
Technical competence and professionalism



- They are a long way ahead of their competitors
- They are marginally ahead of their competitors
- They are all pretty much the same
- They are marginally behind an alternative supplier
- They are significantly behind an alternative supplier

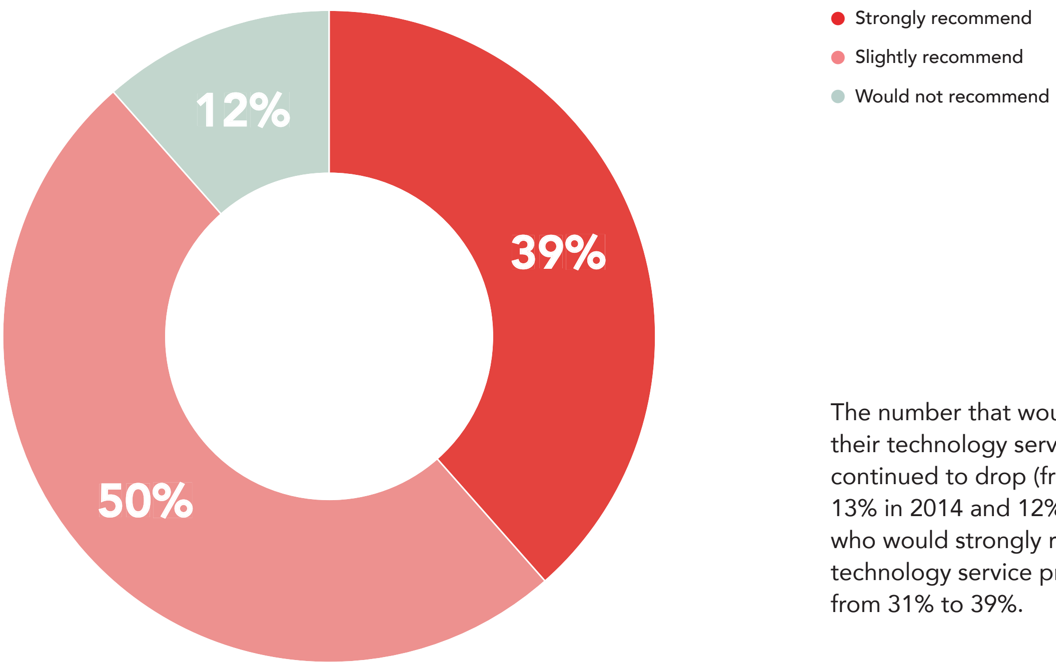
Changes to the ratings for technical competence and professionalism were less obvious. Despite a small reduction in those who felt their provider was a long way ahead of their competitors (14% reduced to 13% in 2015), there was an increase in the proportion who believed they were marginally ahead (28% in 2014 to 38% this year). 8% believed their provider was significantly behind its competitors (9% last year).

Value for money



Value for money ratings have improved year-on-year, with 20% believing they receive excellent value for money (compared to 8% last year) and 32% believing they receive good value for money (up slightly from 29%). In 2014 5% felt value for money was poor and an additional 6% felt it was very poor. In 2015 the combined proportion was slightly higher at 12% (compared to 11%) but nobody felt that value for money was very poor.

Recommendation



The number that would not recommend their technology service provider has continued to drop (from 21% in 2013 to 13% in 2014 and 12% in 2015). Those who would strongly recommend their technology service provider increased from 31% to 39%.

CONCLUSION

The report brings together key information in critical areas of outsourcing, vendor management, structure of the global mobility function, market shares and vendor costs. The report aims at presenting the essence of the information shared by the FEM members. There are no two identical global mobility functions and there is no absolute right answer when it comes to managing them and resourcing them. Business needs play a major part in where the function sits and how it works. However, this report holds useful information that can be used as a tool when reviewing a global mobility team internally and working towards best practice.

It was interesting to see the increased proportion of respondents who had initiated over 500 new assignments in the past 12 months, perhaps some evidence of the growth we predicted last year.

There was a continued increase in the number of respondents that believed they should report into talent management, in particular those managing larger programs. For the first time we have evidenced the shift towards matrix reporting as a preferred option, possibly as a result of a desire for global mobility to play more of a strategic role within the business.

There were a wide range of responses around 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 those who participated in the survey. Each response has contributed in a huge way to making the study a success.

The Forum for Expatriate Management
September 2015

APPENDIX A

LIST OF SURVEY PARTICIPANTS

ABB
Accenture
Adama Agricultural Solutions
ADP LLC
Aggreko
AIG
Albemarle Corporation
Allnex
Amec Foster Wheeler
AmerisourceBergen
Amnesty International
Anglo American
Anjika Consulting Inc.
Anthelio Healthcare
ANZ
Aon
Aprati Foods (Cambodia) Ltd
Aramco Overseas Company
Areva Inc
Arkadin Australia Pty Ltd
Arla Foods amba
Arup
Astellas Pharma
A. T. Kearney
Atos
Ausenco
Avery Dennison
Avon Products Inc
Bank of America Merrill Lynch
Barry Callebaut Group
Baxter
BearingPoint
Biogen
Bombardier
Bosch
Boston Consulting Group
Brambles
Bravura Solutions
BT
CA Technologies
Campbell Soup Company
Capgemini
Capital Group Companies
Carlsberg Group
Cartwright
CB&I
CBI
CCE
CGI
Cipla
City Football Group Limited
Clinton Foundation
CNH Industrial Italia Spa
Cognizant
COWI A/S
CSG International
Cytec Industries Inc
Danone
Datamatics Global Services Ltd
DaVita
DEA Deutsche Erdoel AG
Dell
Deloitte
Diamond Offshore
Discovery Communications
DNV GL
Doosan Babcock
DSV
Dyson
Ecolab GmbH
EDF Energy
Edwards Limited
Eindhoven University of Technology
Ensco
ERG (formerly ENRC)
Expedia.co.uk
EY
Federal-Mogul Corporation
Fidelity Investments
Flight Centre Travel Group
FMC Technologies
Ford Motor Company
Franklin Templeton
Frontica Advantage
FTF
Garmin
General Motors Company
Goodyear Dunlop Tires Operations S.A.
Greenpeace International
Harris Corporation
Harvard University
Hatch
Hay Group
Herbalife
HSBC
IBM
IFF
IHG Plc
IHS Inc
Imperial Tobacco Ltd
IMS Health
Infineon Technologies AG
Ingersoll Rand
International Personal Finance
Ipsos MORI Ltd
Jacobs Engineering Group Inc
Johnson & Johnson
Johnson Matthey
Juniper Networks Inc
KBR
Kellogg Company
Kerry
King Digital Entertainment
KPMG
Laing O'Rourke
Laureate
Lazard
Leo Burnett
Les Amis De L'expat
Liberty Mutual Insurance
Lumesse
M+W Group
Macmahon
Macquarie Group
Martha Turner Sotheby's International Realty
Mattel
Mayer Brown
MFS Investment Management
MicroVention
MIC Tanzania Ltd
Misys
MMG
Morgan Stanley
Mundanzas Rumbo
Munich Re
N M Rothschild & Sons
NAMSA
NCR Corporation
Nestlé USA Inc
NetApp Inc
Nike Inc
Novo Banco
Novozymes A/S
NXP
Optus
OSI Group
PA Consulting Group
Palladium (formerly GRM International)
Panalpina
PAREXEL International
Philip Morris International
Philips
PLH Group
PVH Corp
PwC
QinetiQ
Renna
Repsol
Rockwell Collins
Sabre
Saipem America
Sanmina
SAP SE
Schnurbusch
Siemens
Skanska
Software AG Bangalore Technologies
Sogeti Nederland B.V.
Sopra Banking Software
Standard Chartered Bank
Starr Companies
State Street
SThree
SunGard
Superior Energy Services
SVB Financial Group
Swarovski Group
Telefónica
Terex Corporation
Tesco
The Coca-Cola Company
The LEGO Group
The Manitowoc Company Inc
The Sage Group Plc
TIBCO Software
TJX
TME
TomTom
Trend Micro Inc
TSHousing
Tyco
Uber
UCB
Unipart Aftermarket Logistics
Volvo Group
Weatherford
Western Union
Westpac
Whirlpool
Wilson Sporting Goods
World Vision International
XL Catlin
Your Excellent Health Service
Yum Brands

APPENDIX B

LIST OF SERVICE PROVIDERS

ACE Medical Inc
ADP LLC
Aetna International
Afrilogistics
AGS
AIG
AIReS
AIRINC
Allianz
Altair Global Relocation
Amber Lodging
Aon
Armstrong International
Arpin Group
ASG
Asian Tigers Mobility
Aspire Mobility
Aviva
AXA PPP
Baker & McKenzie
Baker Tilly
Barst Mukamal & Kleiner LLP
BCF
BDO
Berry, Appleman & Leiden LLP
Boxx
BridgeStreet
Bristol Global Mobility
Brookfield GRS
Bupa
Cartus
Celergo
Champion International
Chipman Relocations
Cigna
Clearview
Concur
Continentale
Crown World Mobility
CWS
DavidShield
Deloitte
DSP
DWI
ECA International
Egencia
EIG
Emigra Worldwide
EMS
Equus Software
Executive Quarters
Expat International
Expatax
Expaticore
EY
Ferguson Snell
FESCO
Forte
Foster LLP (formerly FosterQuan LLP)
Fragomen LLP
Frasers Hospitality
GeoBlue
Global Tax Network
Globality Health
Gosselin Group
Goudse
Grace Mobility
Graebel Relocation
Grant Thornton
Greenberg Traurig LLP
GTN
Harbour HR
Hessel
HomeCorp
Horizon
HR Toolbox
Hunton & Williams LLP
Immigration Law Group
Interconnex
International SOS
Isaac's
K2 Corporate Mobility
KPMG
Lexicon Relocation
Magrath LLP
Malitzlaw Inc
Marsh
Mayer Brown
McGladrey
Mercer
MetLife
TheMIGroup
MinterEllison
mobilitymatters
Moore & Van Allen
Moss Adams LLP
MOVE Guides
Mundanzas Rumbo
MSI
National Corporate Housing
NEI
New World Van Lines
North American Van Lines
Oakwood
Paragon
Paramount
Pearl Law Group
Personal Relocation
Philip Rea
Pickfords
Place2Place
Plus Relocation
Polaris
Previnter
ProLink
Proskauer
PwC
QUEST
RELO
Relocation Support Services
RMR
Santa Fe
Satterlee Stephens Burke & Burke LLP
Select Apartments
Seyfarth Shaw LLP
SilverDoor
SIRVA
Sodagar Nielsen Law Group
Sterling
Suddath
SuiteAmerica
Synergy
Taxand
TEAM Allied
Team Relocations
The Apartment Service Company
TheMIGroup
Tina Sharma Law
TWW
UniGroup
United Healthcare
United Van Lines
UTS
Wayne Moving & Storage
Weichert Workforce Mobility
Wormser, Kiely, Galef & Jacobs LLP

APPENDIX C

OUR SURVEY SPONSORS

Equus software

Equus technology helps companies optimise their workforce mobility processes.

AssignmentPro™ is a comprehensive web-based system that manages all aspects of expat mobility and is easily integrated with enterprise platforms such as Oracle, PeopleSoft, SAP and Workday.

Expat4Cast is a web-based assignment cost estimate calculator that generates comprehensive assignment tax and social security costs in minutes.

PinPoint™ is our business traveller compliance tracking system and is designed to help companies and their employees stay in compliance for tax, immigration and legal purposes.

Equus was established in 1999 and has offices in Denver, Dallas and London. Equus works with more than 100 companies with over 200,000 globally mobile employees worldwide.

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To contact Fragomen in over 40 offices located worldwide, please visit www.fragomen.com

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 18 countries across every region of the world. Today, they have more than 2,200 immigration professionals 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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Graebel Relocation Services Worldwide, Inc.

Transforming Relocation Services
165 Countries | 6 Continents

Global 100 and Fortune 500 companies count on Graebel for contemporary solutions, expert consultancy and administration of their global relocation programs in 165 countries. Graebel Relocation centers in the Americas, EMEA and APAC regions are staffed with industry-experienced people passionate about exceeding customers' expectations.

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Graebel Relocation holds multiple recognized credentials and has earned exceptional accolades from clients and from within its industry that include the Forum for Expatriate Management EMMAs; First-places in the 'HRO Today' Relocation Baker's Dozen; the Platinum award; #1 Ranked Service Company; Gold International Business Stevie® Award, and more!

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Oakwood Worldwide® is the premier provider of corporate housing and serviced apartment solutions through its well known brands, Oakwood®, ExecuStay® and Insurance Housing Solutions™. With a presence in all 50 United States and more than 85 countries, the company provides move-in-ready furnished accommodations to meet the needs of global organizations and business travelers alike. Oakwood Worldwide is based in Los Angeles with a Worldwide Sales and Service Center in Phoenix and regional headquarters in London, Singapore and Toronto.

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