



# Managing the Global Mobility Function 2014

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A benchmark study from [The Forum for Expatriate Management](#)



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## 2. Executive Summary

**There were 235 respondents to the survey. The data in the study is based on program size, sector as well as other relevant criteria.**

Well over a third (37.4%) of respondents in the survey were global heads of mobility and nearly a fifth (17.9%) of respondents were regional or country heads of global mobility.

### The key findings

#### Where the global mobility function sits within the organization

- Nearly half (48.1%) of global mobility functions in this survey reported into compensation and benefits/reward, and 30.2% of teams reported directly to VP human resources.
- A significant number of respondents believed that the global mobility function should report to VP HR (38.3%). While 29.4% of respondents felt they should report into compensation and benefits. Just over a fifth (22.1%) wanted to report into talent management.
- Well under half (43%) of global mobility functions were centrally located in one location. Over a quarter (28.5%) had a central center of excellence with regional hubs and 13.6% of teams were centrally managed in many locations.

#### Services that were outsourced

- The top three outsourced services were tax (outsourced by 88.9% of the survey respondents), removals and household goods (outsourced by 84.3% of respondents) and cost of living data (outsourced by 80% of the respondents)

#### What the assignee caseload ratio was

- The assignee caseload ratio gave 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 22 assignees per head
  - For large programs (over 1,000 assignees): the median caseload ratio was approximately 53 assignees per head.

#### The average cost per assignee in terms of the main service areas

- The cost per assignee in the following service areas was:
  - o \$7,395 for tax
  - o \$3,340 for immigration
  - o \$7,712 for assignment and vendor management
  - o \$6,762 for relocation/destination services
  - o \$6,331 for removal/household goods
  - o \$3,038 for international medical cover
  - o \$6,272 for serviced accommodation
  - o \$357 for cost of living data.

There was insufficient data to produce cost information on payroll and expense management.

## The cost of the most commonly used services

Summary	Lower Quartile	Median	Upper Quartile
A US Tax Return (in USD)	USD 1,350	USD 2,000	USD 2,500
A Cost Projection (in USD)	USD 500	USD 750	USD 1,000
An entry/exit meeting (in USD)	USD 500	USD 700	USD 1,000
A Tax Equalization calculation (in USD)	USD 500	USD 675	USD 1,138
A UK Tax Return (in GBP)	GBP 805	GBP 1,000	GBP 1,500
A repatriation fee for your relocation management service provider	USD 750	USD 1,000	USD 1,425
A monthly fee for your relocation management service provider	USD 150	USD 300	USD 1,000
A repatriation fee for your relocation management service provider	USD 688	USD 1,000	USD 1,163
The cost of shipping a 20ft container between Europe and the US (in USD)	USD 8,000	USD 10,000	USD 15,000
A standard US visa (USD)	USD 1,500	USD 2,050	USD 4,000
A typical home search in a major city (USD)	USD 1,225	USD 2,150	USD 3,361

### How firms monitored their vendor performance

The highest share (37.4%) of respondents said they relied on assignee 'noise' and informal feedback, while 29.4% reported that it was their vendors who conducted a survey for them. Only 19.6% said they conducted a formal internal survey on assignee satisfaction.

### How often organizations go out to RFP

In some service areas (immigration, relocation/destination services, removals and household goods, and international medical cover) the frequency with which a typical organization went out to RFP was every three years. However most respondents went out to RFP every five-plus years for tax, assignment and vendor management, cost of living data, serviced accommodation, payroll, expense management and technology.

### Vendor performance ratings

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

- For both small and large programs the service quality received reasonable levels of client satisfaction. Among all the service providers, the respondents stated that their immigration provider was most likely to be the one they would strongly recommend to a friend in another organization. Overall results suggest that the vendors' approach to their clients and business in general was competent and professional.

### An insight into the current market

For the first time this survey was able to split the results between the regions and look at who had greatest market share globally and regionally.

For the purpose of this study market share of the eleven principal sectors were analyzed and assessed.

- The big 4 still dominate the tax provider market with PwC having the largest market share.
- Fragomen remained dominant as the leading provider for immigration.
- Cartus remained the firm with the greatest share of the assignment and vendor management market, closely followed by SIRVA and Brookfield GRS.
- Cartus had the greatest share of the relocation/destinations services market followed by Santa Fe/Interdean and Crown World Mobility.
- Santa Fe/Interdean was the dominant provider in the removals/household goods market, followed by Crown World Mobility and Cartus.
- Mercer had over half of market share when it came to cost of living data provider.
- ADP once again had the largest share of the payroll market.
- Oakwood had the largest market share across the three regions although the majority of respondents used smaller serviced accommodation providers
- Cigna had the largest market share for international medical cover.
- Cartus had the highest market share for expense management.
- Equus held the number one position for technology.



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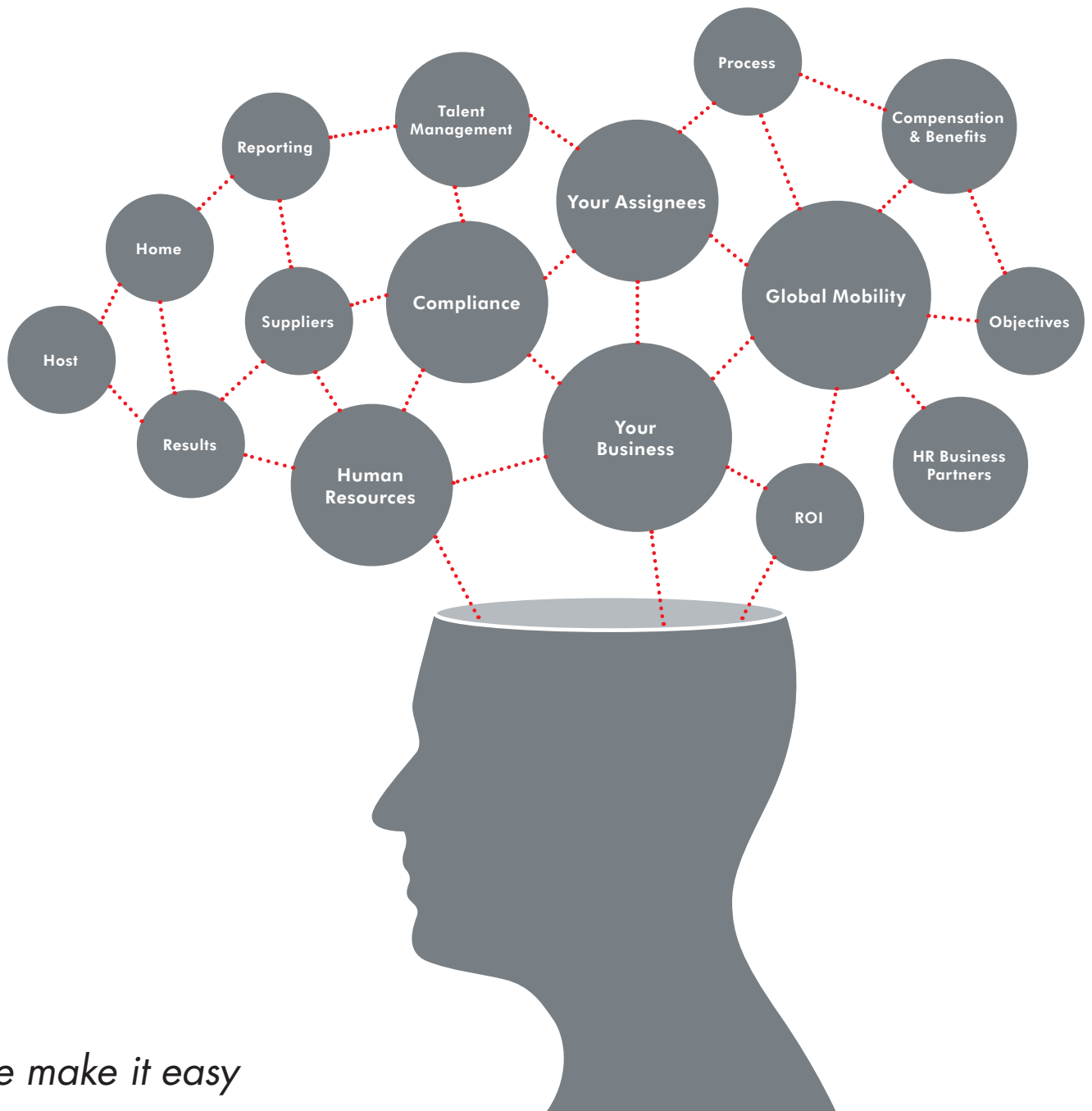


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