



Managing the **Global Mobility** Function 2013

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



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Benefits



- Impartial global mobility advice
- Extensive trusted global vendor network
- KPI service satisfaction in excess of 98%
- Independent vendor management and auditing
- Live reporting and access to K2 case management system
- Policy compliant, customer focused K2 Consultants in global locations



K2 CORPORATE MOBILITY

K2 recognizes that global companies want to source efficient and accountable services, from an ever-evolving supplier base in the global mobility sector. As a result, K2 implements tangible service delivery through advocacy, balancing the commercial needs of business and Human Resources with high quality and efficient communication.

At K2, we are proud of our excellent working relationships with our clients and have a true understanding of their organization, culture, long-term goals and current needs. K2 excels at customer service.

Global Mobility

Relocation Services

Coordination and management of services including: booking travel, immigration assistance, home search, school search, orientation, temporary accommodations, furniture rental, settling-in assistance, cultural and language training, tenancy management and departure services.

Premier Service

K2's Premier Tier Service offers eligible high profile executives a dedicated senior K2 Account Manager in both the host and home location. The K2 Account Manager provides 24 hour support and bespoke research, anticipating the executive's every possible need.

Shipments

K2 provide one point of contact throughout a relocation, coordinating highly qualified and carefully selected vendors. K2 has a wealth of move management and relocation expertise and manage moves globally, providing exceptional client service.

Short Term Mobility Shipments

K2's Short Term Mobility Shipments (STMS) service offers a cost effective alternative to excess baggage for assignees undertaking Short Term Assignments. Premium service, minimum cost.

K2 Clear Insurance

Demonstrating a continued focus for innovation and simplicity, K2 developed a unique insurance cover, providing fully comprehensive door to-door, all risks, insurance cover. It avoids the need for time consuming valued lists where items mistakenly omitted result in calculation errors and offers a zero excess on all claims.

Expense Management

K2 facilitates the auditing, reconciliation and payment of expenses, ensuring tax and policy compliance and minimizing risk. Service includes access to K2's online case management and reporting system.

Advisory

Policy Review and Benchmarking

Review and write international assignment policies considering best practice and benchmarking data.

Training

Broad range of training sessions tailored for technical training and relevant topical subjects.

Vendor Reviews

Coordinating vendor RFP's, reviewing service, performance and cost.

Process Review

Process mapping and process re-engineering.

Destination Support

Location specific research, due diligence and relocation services.

1. Introduction



Despite the recent tough global economy we are still seeing more and more organizations moving their top talent around the globe in the pursuit of new business or expansion in existing locations. Whilst many large

organizations have an established Global Mobility team we are seeing an increased number of smaller organizations putting Global Mobility teams in place rather than leaving the small number of assignees to general HR.

As any Global Mobility professional can tell you - unlike most employees, there is a higher workload when it comes to assignees and also a greater risk. With governments tightening up on compliance it is more essential than ever that organizations can track and monitor their assignees to ensure consistency and compliance.

At the FEM, our mission has always been simple: namely 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. We are delighted to present the results of our 4th Managing the Global Mobility Function Survey. We explore some of the most pertinent questions asked by HR/Global Mobility Directors worldwide for establishing and maintaining their global mobility teams according to global best and next practices.

This study looks into the details of how Global Mobility programs are organized, managed and delivered to the global assignee population and benchmarks the Global Mobility function itself.

The report presents key information on how the world's leading companies organize and administer their Global Mobility teams. Other critical information is also presented, including:

- Assignee/Team Member ratios
- Team Structure and reporting lines
- Outsourcing
- Vendor market share and costs
- And for the first time we have salary and bonus data on the Global Mobility team itself.

We hope you find the survey a useful tool in benchmarking your own function.

A full list of participating organizations and 'name-checked' service providers is included in the appendix.

Lastly, we would like to point out that we have a vast amount of data that can be analyzed in further detail upon request. For Global Mobility Directors, we can now offer independent and objective benchmarking data for your organization against a comparator group of your choice. For service providers, we can give you important feedback on your levels of service performance and client satisfaction as benchmarked against a comparator group of your choice.

If this is of interest, please contact me at myrianthe.ewington@centaur.co.uk

Myrianthe Ewington

Chapter & Member Services Manager - The Forum for Expatriate Management

September 2013

2. Executive Summary

More than 400 companies completed the survey and we have produced data based on program size, sector and other relevant criteria.

31.5% of respondents in our survey were Global Heads of Mobility, and another 20% of respondents were Regional or Country Heads of Global Mobility.

The Key findings of our survey are as follows:

Where does the Global Mobility function sit in the organization and where should it sit?

- 41.6% of Global Mobility Teams in this survey report to Compensation and Benefits/Reward, and 32% of teams report directly to VP Human Resources.
- A significant number of respondents believed that the Global Mobility function should report to VP HR (37.6%). This is down 0.2% from last year. Compensation and Benefits followed at 30.7% and this was an increase of 2.2% from last year.
- 42% of Global Mobility teams are centrally located in one location. A quarter have a central center of excellence with regional hubs and 17% of teams are centrally managed in many locations.

What services are outsourced?

- The top 3 outsourced services were Tax (outsourced by 85.8% of survey respondents), Removals and Household Goods (outsourced by 82.8%) and Relocation/Destination Services which is outsourced by 79.8% of the survey respondents.

What is an appropriate Assignee Caseload Ratio?

- The Assignee Caseload Ratio gives us an insight into the appropriate ratio of assignees per GM professional. The findings from this survey demonstrate the following;
 - For small programs (up to 100 assignees): the median caseload ratio was 16 assignees per head
 - For medium programs (from 100 to 1000 assignees): the median caseload ratio was 43 assignees per head
 - For large programs (over 1000 assignees): the median caseload ratio was approximately 75 assignees per head.

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

- The cost per assignee for small programs in the following service areas is; \$10,093 for Tax, \$8,446 for Immigration, \$8,863 for Relocation/Destination Services, \$4,814 for Removal/Household Goods, \$5,544 for International Medical Cover, \$1,174 for Serviced Accommodation, \$7,953 for Payroll Services and \$651 for Cost of Living Data. There was insufficient data to produce cost information on Assignment and Vendor Management.
- For medium sized programs, the cost per assignee was \$4,833 for Tax, \$2,698 for Immigration, \$4,019 for Relocation/Destination Services, \$6,792 for Removal/Household Goods, \$6,256 for Assignment and Vendor Management, \$4,640 for International Medical Cover, \$2,794 for Serviced Accommodation, \$2,567 for Technology, \$811 for Expense Management and \$777 for Cost of Living Data.
- For large programs, the cost per assignee for Tax was \$4,780, \$2,162 for Immigration, \$4,111 for Serviced Accommodation, \$3,937 for Removal/Household Goods, \$3,274 for Relocation/Destination Services, \$1,832 for International Medical Cover and \$263 for Cost of Living Data. There was insufficient data to produce cost information on Assignment and Vendor Management, Payroll Services, Expense Management, and Technology.
- It was clear from our survey results that large programs were benefiting from economies of scale in almost all the business areas.

How much do the most commonly used services cost?

| Summary | Lower Quartile | Median | Upper Quartile |
|--|----------------|------------|----------------|
| A US Tax Return (in USD) | USD 1,325 | USD 1,750 | USD 2,000 |
| A Cost Projection (in USD) | USD 575 | USD 750 | USD 1,000 |
| An entry/exit meeting (in USD) | USD 500 | USD 500 | USD 700 |
| A Tax Equalization calculation (in USD) | USD 450 | USD 575 | USD 844 |
| A UK Tax Return (in GBP) | GBP 913 | GBP 1,200 | GBP 1,950 |
| A repatriation fee for your relocation management service provider | USD 500 | USD 750 | USD 1,395 |
| A monthly fee for your relocation management service provider | USD 100 | USD 125 | USD 250 |
| A repatriation fee for your relocation management service provider | USD 500 | USD 723 | USD 1,238 |
| The cost of shipping a 20ft container between Europe and the US (in USD) | USD 9,025 | USD 12,250 | USD 15,000 |
| A standard US visa (USD) | USD 1,250 | USD 2,500 | USD 3,500 |
| A typical home search in a major US city (USD) | USD 1,500 | USD 2,000 | USD 3,000 |

How do firms monitor their vendor performance?

The highest share (49.6%) of respondents said they relied on assignee 'noise' and informal feedback, 22.8% reported that it was their vendors who conducted a survey for them and only 24.6% said they conduct a formal internal survey on assignee satisfaction.

How often does a firm go out to RFP?

In the main service areas – Immigration, Assignment and Vendor Management, Relocation/Destination Services, Removals and Household Goods, Serviced Accommodation, Payroll, International Medical Cover, Expense Management and Technology the frequency with which a typical firm switches its main service providers is every 2 - 3 years. However most respondents tended to leave the RFP process for Tax Providers and Cost of Living Data Providers between 3 – 5 years.

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 good levels of client satisfaction. Amongst all the service providers, the respondents stated that their Removals and Household Goods 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 in the current market

For the purpose of this study market share of the 11 principal sectors were analyzed and assessed.

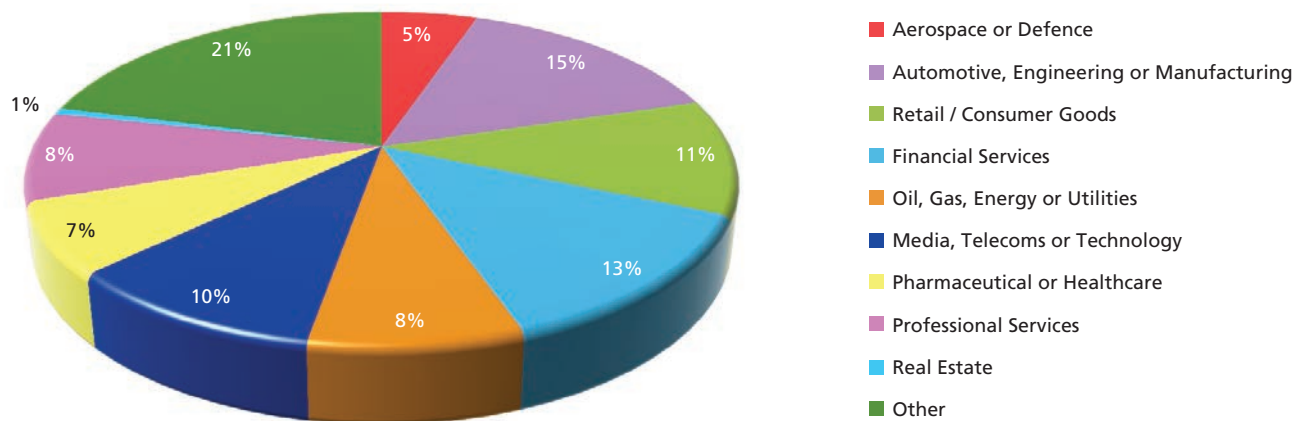
- For Tax, PwC lead with a market share equivalent to 26%. This is the same as last year.
- Fragomen remained dominant with 43.5% of the market share for Immigration.
- Cartus remain the firm with the greatest share of the assignment and vendor management market, closely followed by Brookfield, Ernst & Young, SIRVA, Weichert, Crown World Mobility and Graebel Relocation.
- Crown World Mobility had the greatest share of the Relocation/Destinations services market (16.9%), followed by Cartus and Santa Fe/Interdean.
- Crown World Mobility was the dominant provider in the Removals/Household Goods market with a 14.3% share, followed by Interdean/Santa Fe, Brookfield and SIRVA.
- Mercer had almost two thirds market share when it came to Cost of Living Data provider.
- Cartus and Sirva had the highest market share. Both had 10%.
- ADP had a 22.9% share in the payroll market.
- CIGNA had 39% of the market share for International Medical Cover.
- Cartus had the highest market share for Expense Management.
- KPMG held the number one position for Technology with 20% of the market share.

3. Participant Demographics

This section sets out some detailed demographics of the survey population. It includes industry sector of the participating organizations, their headquarter location as well as the program size (for ease of definition organizations were divided into small, medium and large programs, based on the number of assignees).

For the survey population as a whole, respondents were located in four main industries. The top industry sector was the Automotive, Engineering or Manufacturing sector with 15%, followed by the Financial Services sector with 13%, the Retail/Consumer Goods sector

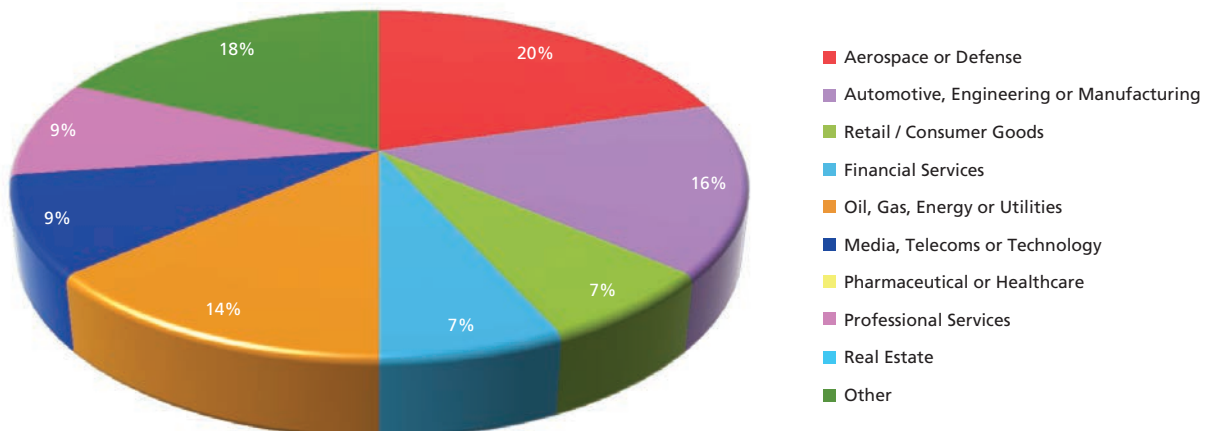
Industry Sector



Detailed Analysis

Organizations with large programs were in the Aerospace or Defense sector (20%), followed by Automotive, Engineering or Manufacturing sector (16%), then the Oil, Gas, Energy or Utilities sector

Industry Sector for Large Programs



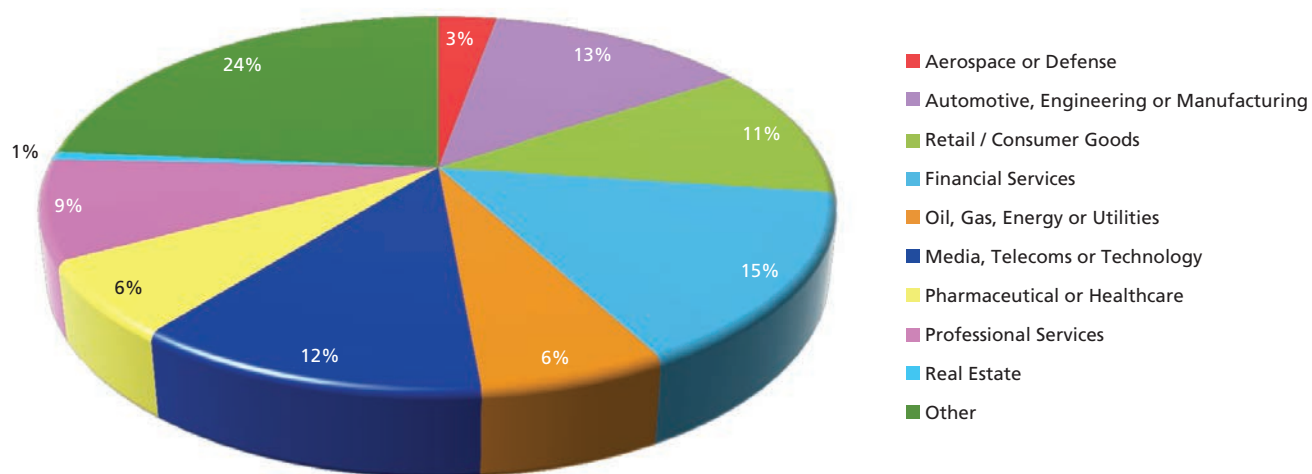
On the other hand, 15% of organizations with small programs were located in the Financial Services sector, followed by 13% in the Automotive, Engineering or Manufacturing sector. 12% of organizations were located in the Media, Telecoms or Technology sector and 11%

with 11% and the Media, Telecoms and Technology sector with 10%. These were closely followed by Professional Services and Oil, Gas, Energy or Utilities both with 8%, Pharmaceutical or Healthcare with 7% and Aerospace with 5% of the survey population.

(14%). The Professional services sector and the Media, Telecoms or Technology sector both had 9%. The Financial Services sector and the Retail/Consumer Goods sector were both indicated by only 7% of respondents.

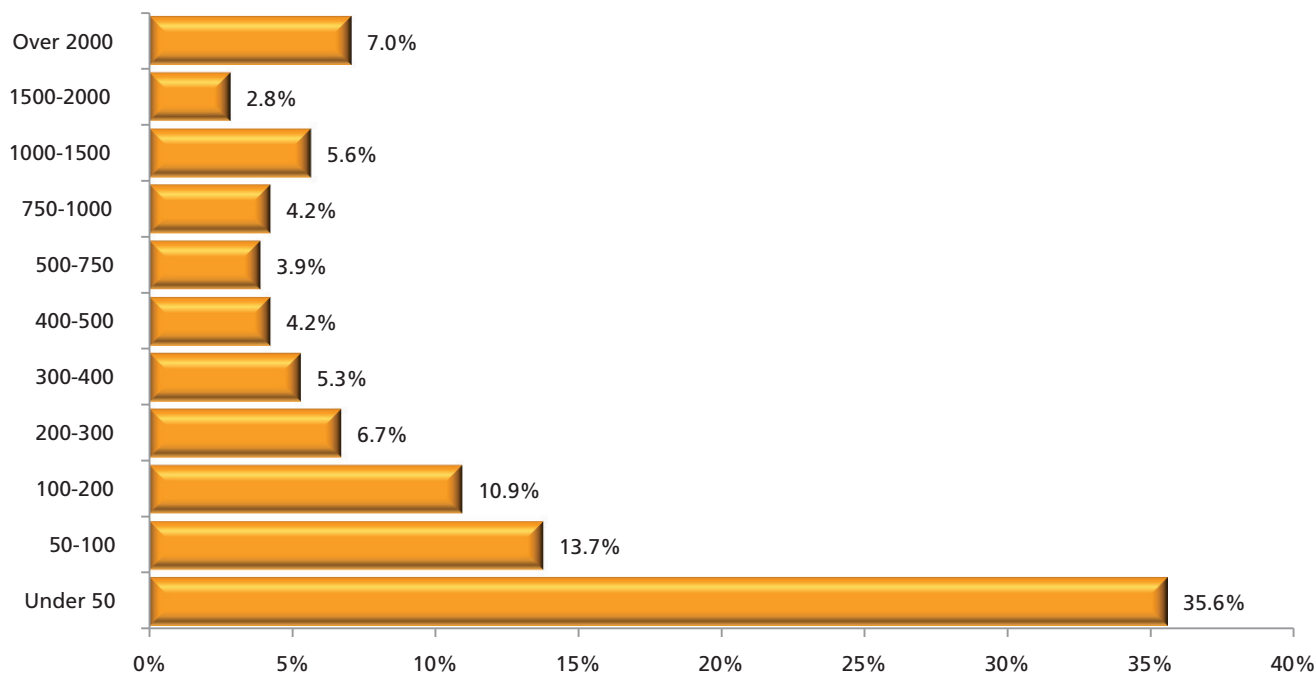
in the Retail/Consumer Goods sector. 9% were based in Professional Services sector and only both the Oil, Gas, Energy and Utilities sector and the Pharmaceutical or Healthcare sector had 6% each.

Industry Sector for Small Programs



Number of Assignees

Just over 49% of respondents have fewer than 100 assignees, around 35% have between 100-1000 assignees, and over 15% have more than 1000 assignees.



For ease of definition, organizations with less than 100 assignees were considered to have 'small' programs; those between 100-1000 were considered 'medium' and those over 1000 assignees were considered as having 'large' programs.

Note: the size of the program does not depend on the company size (but number of assignees worldwide).



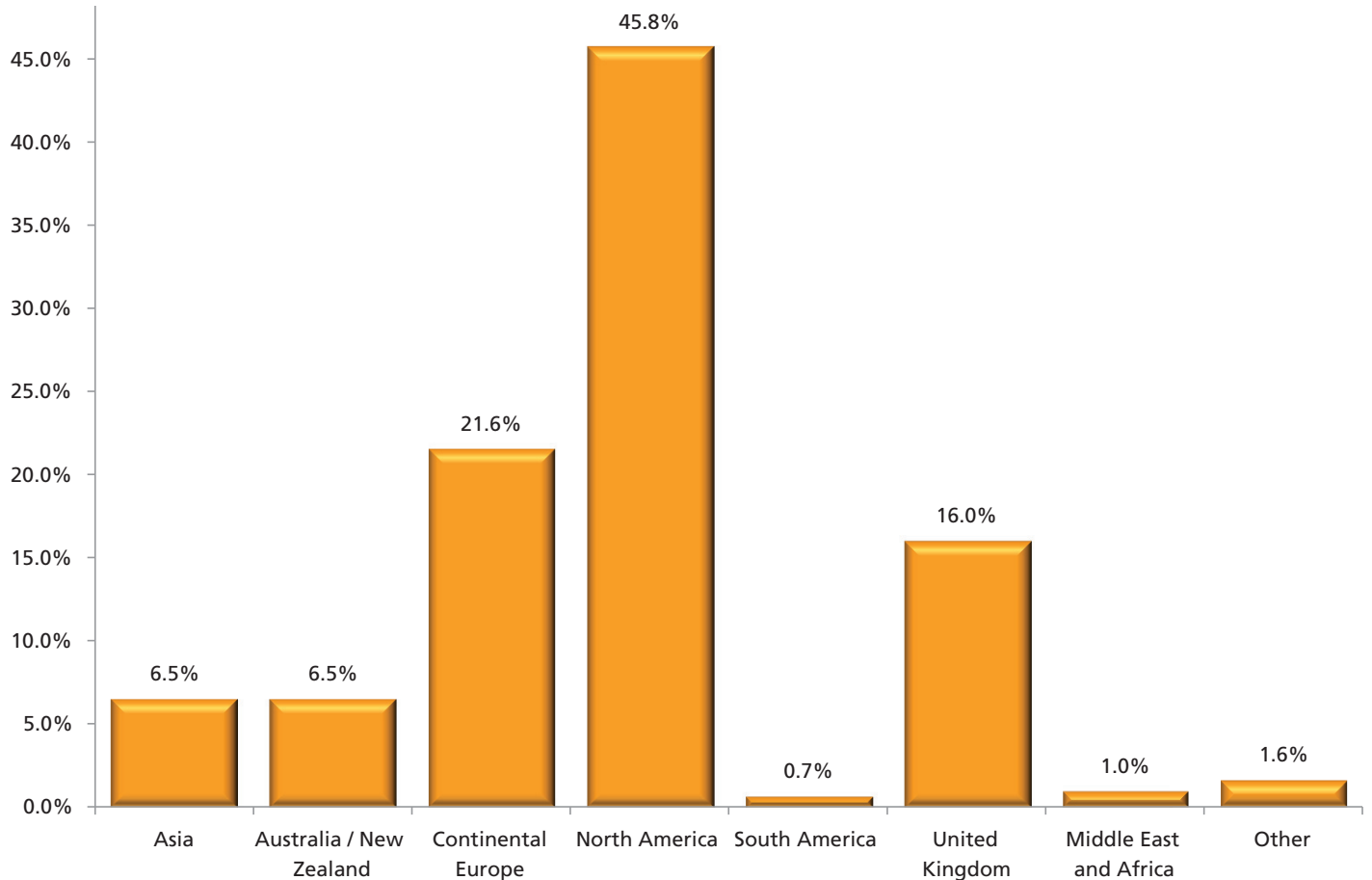
Interesting fact:

There is a strong correlation between industry sector and program size. The large programs tended to be based in the Aerospace or Defense sector or the Oil, Gas, Energy or Utilities sector, whereas smaller programs were more likely to be based in the Financial Services sector, the Media, Telecoms or Technology sector or the Retail/Consumer Goods sector. It is interesting to see that the Automotive, Engineering or Manufacturing sector features highly in both.



Respondents were asked where their headquarters are located. This is shown in the chart below.

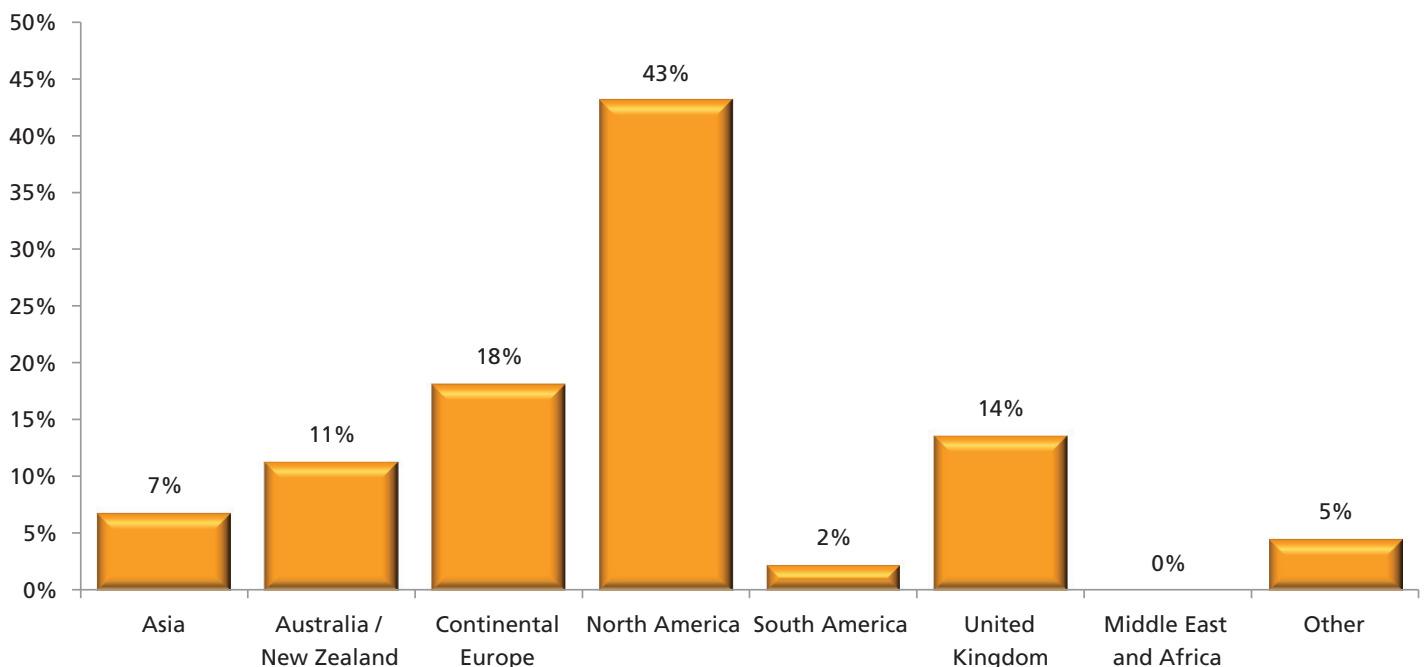
Headquarter Location for all Organizations



Almost 46% of the survey respondents were from North America, compared to 16% in the UK and just under 22% in Continental Europe.

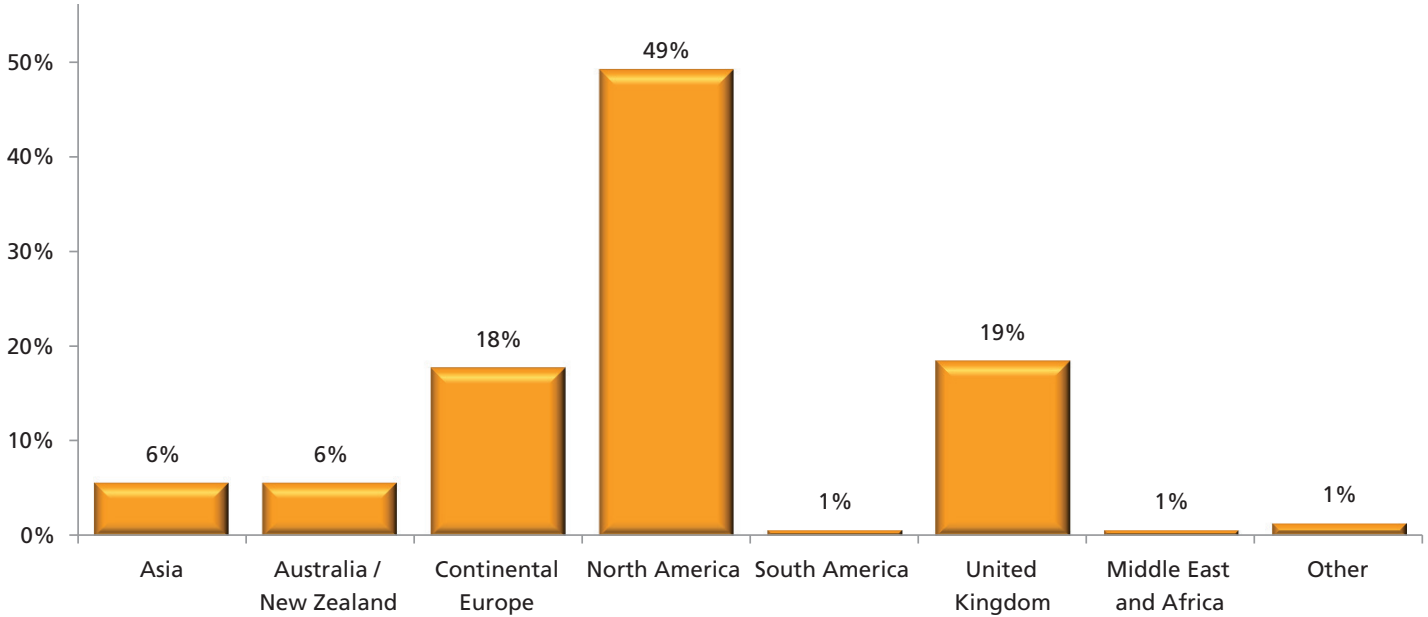
The more detailed analysis showed that the HQ location of organizations with large programs shifted away from North America, down almost 3% to 43%, and down in Continental Europe to 18%.

Headquarter Location for Organizations with Large Programs



The proportions differed in the organizations with small programs, with 49% having their headquarters located in North America and again 18% headquartered in Continental Europe. The number headquartered in the UK (19%) was higher than for large programs.

Headquarter Location for Organizations with Small Programs



4. The Global Mobility Function

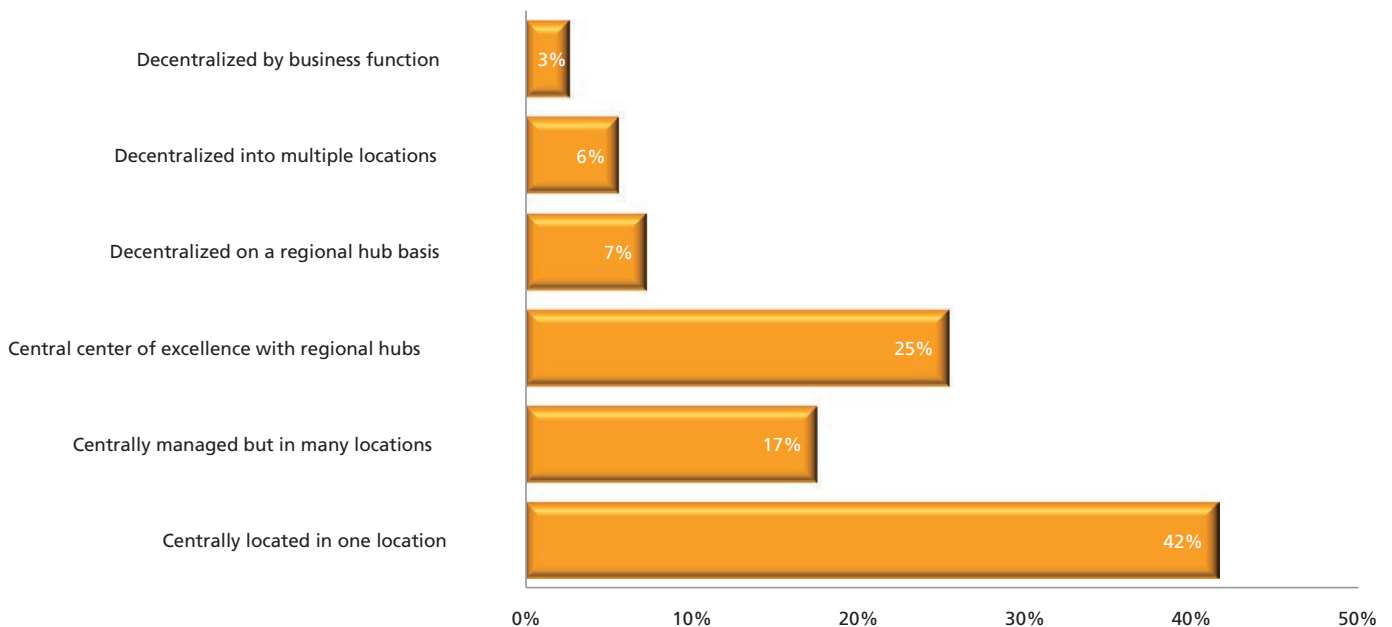
This section explores the Global Mobility Function with a deeper insight into the structure of the Global Mobility Teams (GMT). The study investigated whether organizations were centrally located in one location or decentralized on a regional hub basis or multiple locations. Results clearly showed that program size influences Global Mobility Team structure. We also asked our respondents where they currently report and also where they think Global Mobility Teams should report. A detailed analysis showed differences between small and large programs in this area.

The Structure of Global Mobility Teams (GMT)

42% of the survey population reported their GMT was centrally located in one location. 25% said they had a center of excellence with regional hubs. 17% stated that their GMT was centrally managed but split in many locations. 7% have decentralized their GMTs

on a regional hub basis. 6% are decentralized into multiple locations and only 3% are decentralized by business function. These figures have hardly changed from last year. However there are some differences between small and large programs in this scope.

Structure of Global Mobility Teams



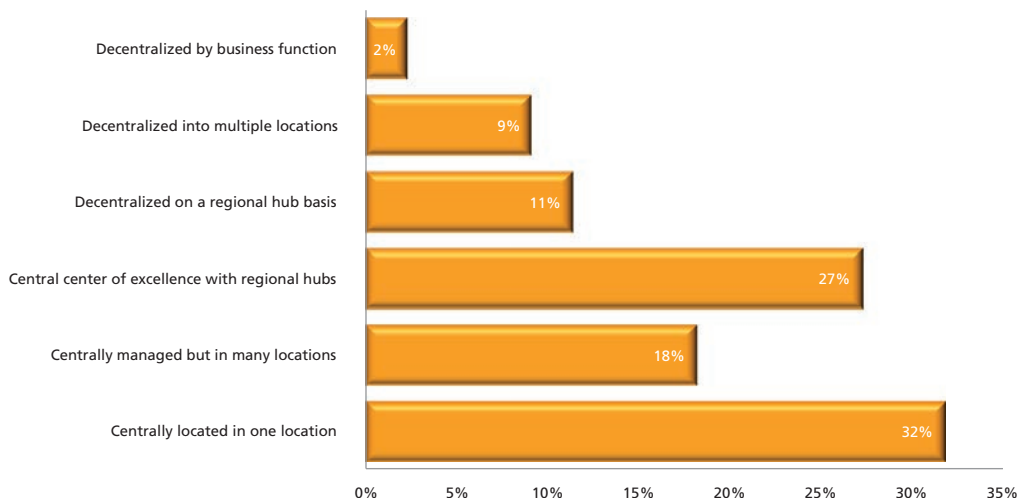
Interesting fact:

Program size influences Global Mobility Team (GMT) structure. Small programs tend to be centralized in one location and large programs tend to mainly be split between being centrally located in one location, having a central center of excellence with regional hubs or were centrally managed but in many locations



Detailed Analysis

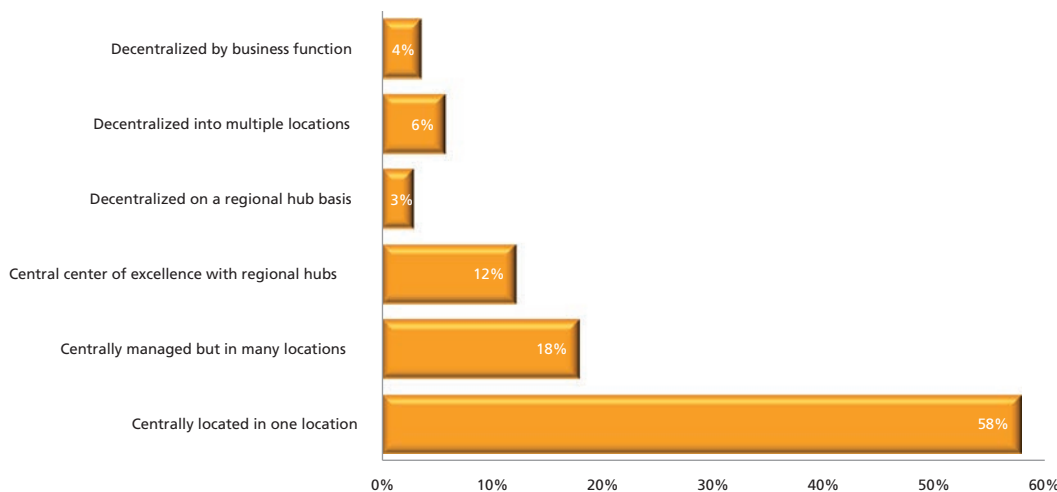
Structure of Global Mobility Teams (Large Programs)



The analyzed data shows that just under a third of the respondents with large programs reported that their GMTs were centrally located in one location. 27% reported that their GMT had a central center of excellence with regional hubs whilst 18% stated they were centrally managed but in many locations. Only 11% of respondents had their GMT decentralized on a regional hub basis, 9% were decentralized into multiple locations and only 2% were decentralized

by business function. As we saw last year, one of the reasons behind the need for large programs to have their Global Mobility Team either centrally located, centrally managed but in many locations or with a central center of excellence with regional hubs could be due to the increased need of organizations to ensure consistency of policy, practice and governance across the assignee population.

Structure of Global Mobility Teams (Small Programs)

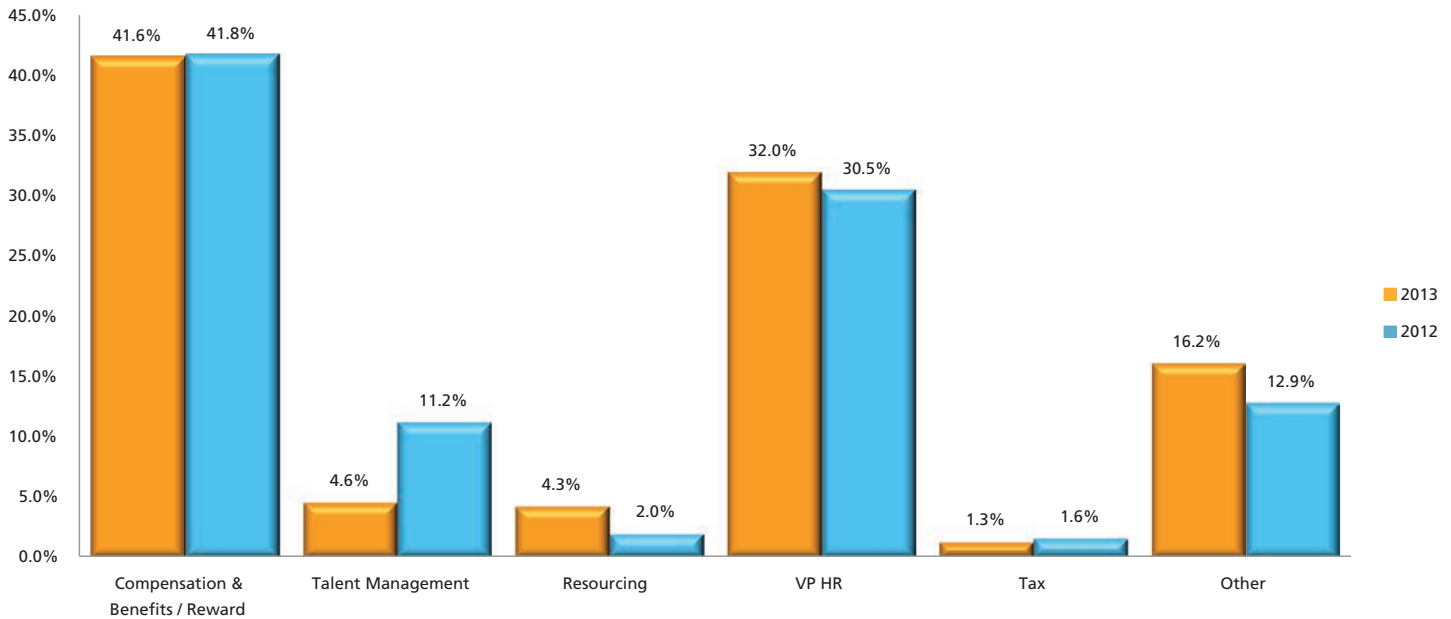


On the other hand, 58% of companies with small programs tended to be centrally located in one location. 18% of respondents with small programs reported that their GMTs were centrally managed but in many locations, and 12% reported that their GMT had a central center of excellence with regional hubs. Just 3% were decentralized on a regional hub basis, 6% decentralized into multiple locations and 4% decentralized by business function. These figures have changed little from previous years. Again, as more organizations are recognizing the need for assignees to be administered with their own department they could

be setting up their teams in line with best practice and managing their assignees centrally in one or many locations or with a central center of excellence and regional hubs.

This shows a subtle difference between GMT structure and program size, with larger programs adopting either a central center of excellence with regional hubs or centrally located in one location, and GMT's looking after smaller programs tending to opt for being centrally located in one location.

Where does your Global Mobility team report within your overall organization?

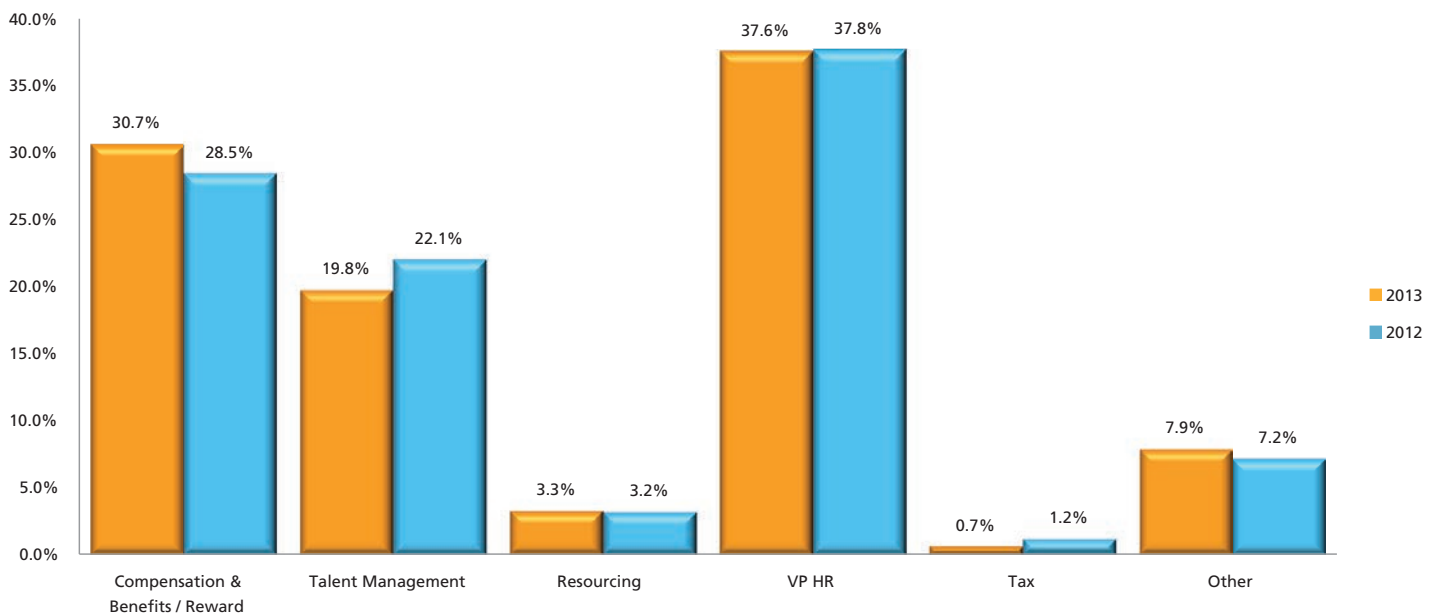


Results for the whole survey population show that 41.6% of the respondents report into Compensation and Benefits/Reward. This has decreased fractionally from the previous year. VP HR saw a small increase of respondents reporting into this department from 30.5% last year to 32% this year. Last year 11.2% of the respondents reported into Talent Management and

this has decreased to 4.6% this year. Finally, 4.3% of the respondents report into Resourcing and 1.3% of the respondents said they reported into Tax.

Respondents were also asked where they think Global Mobility should report, irrespective of where it currently reports.

Where do you believe your Global Mobility team should report?



Compared to last year there is just over a 2% increase in respondents that believe the Global Mobility function should report directly into Compensation

& Benefits/Reward. The number of respondents that believe the Global Mobility Function should report into Talent Management and VP HR has dropped.

From these results, it can be observed that out of the 41.6% of Global Mobility Teams that report directly into Compensations and Benefits, 10.9% of those respondents claim that they would prefer to change their reporting line. Like last year, most of the respondents would prefer to change their reporting line to VP HR or Talent Management although the total numbers compared to last year have dropped. Fractionally more respondents believe they should report into Resourcing (when compared to last year) but less believe they should

report into Tax.

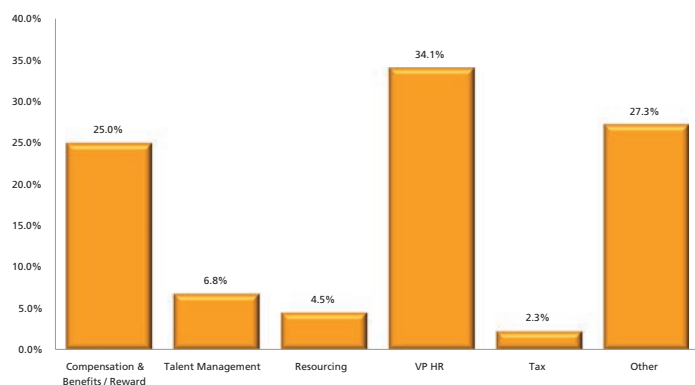
According to the results, one of the most popular areas which respondents believe their Global Mobility function should report directly into was Talent Management. This was a growing trend last year but the enthusiasm for this is less this year, with those who actually report into this area at 4.6% (down from 11.2% last year) and those who believe they should at 19.8% (down from 22.1% last year).

Interesting fact:
Almost 42% of Global Mobility Teams report into Compensation and Benefits/Reward but 10.9% wish to switch their reporting line into VP HR or Talent Management.

Detailed Analysis

The data obtained from respondents can be looked at in greater detail when considering program size.

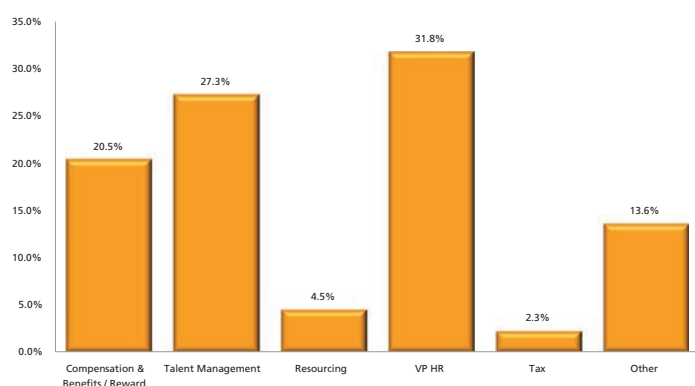
Where does your Global Mobility team report within your overall organization (Large Programs)?



Results show that for large programs (over 1000 assignees) just over a third reported into VP HR and a quarter reported into Compensation & Benefits/Reward. 6.8% report into Talent Management (this was a drop of almost 10% from last year). 4.5% of the respondents reported into Resourcing, 2.3% reported into Tax and 27.3% reported into another part of their organization.

There were striking differences in the areas where the GMT professionals in large programs currently report into and where they would want to report into. The chart below gives us an insight into this.

Where do you believe your Global Mobility team should report (Large Programs)?

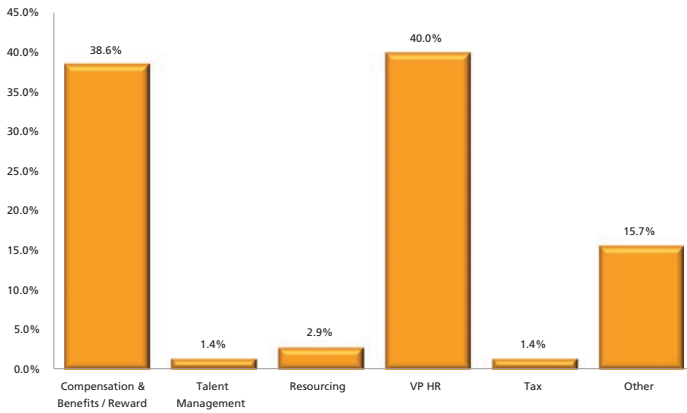


According to the survey results, there is a small decrease in the number of professionals who would like to report into VP HR, 31.8% compared to the 34.1% who are currently doing so. As for Compensation & Benefits/Reward, of the 25% of respondents currently reporting into that area, just under a fifth of them would like to make a switch in their reporting line. Although 20.5% claimed they still wished to report into Compensation & Benefits/Reward. The number wishing to report into Talent Management was quadruple the amount that is currently reporting into Talent Management.

There was no change in the number that currently report in Resourcing or Tax and believe they should remain reporting into Resourcing or Tax.

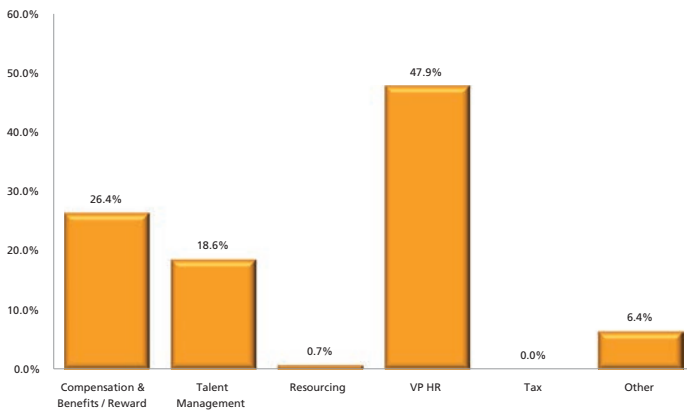
Respondents with smaller programs had different practices and viewpoints regarding reporting lines.

Where does your Global Mobility team report within your overall organization (Small Programs)?



40% of the respondents with small programs (less than 100 assignees) report into VP HR which is almost the same percentage that report into Compensation & Benefits/Reward (38.6%). 2.9% report into Resourcing and both Talent Management and Tax show 1.4% each.

Where do you believe your Global Mobility team should report (Small Programs)?



Almost half of respondents for small programs believe they should report into VP HR (47.9%). Of the 38.6% that currently report into Compensation & Benefits/Reward almost a third of those respondents believe they should switch their reporting line.

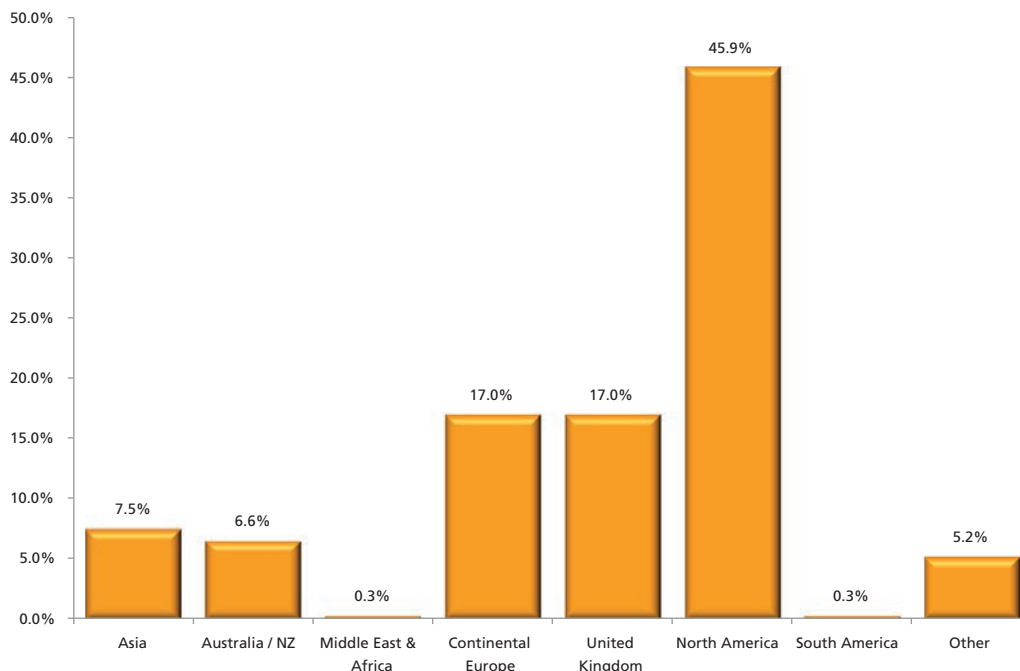
Interestingly, the number of respondents that wished to report into Talent Management was more than thirteen times the percentage that currently are.

A small number of respondents (0.7%) thought they should report into Resourcing but none of the small organizations thought they should report into Tax.

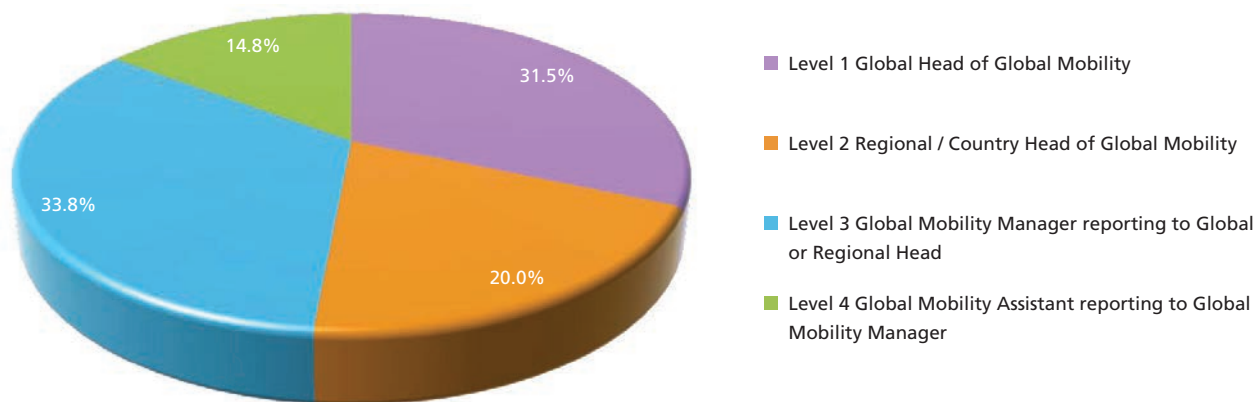
Where is the Head of Global Mobility located?

Respondents were also asked in which region their head of Global Mobility sits. Given the location of the respondent's Global headquarters, unsurprisingly the results from the survey reflect this with 45.8% located

in North America, 17% in continental Europe, 17% in the United Kingdom, 7.5% in Asia, 6.6% in Australia or New Zealand and 0.3% in the Middle East & Africa and in South America.



Job Role of survey respondents



All our respondents are professionals in the Global Mobility sector (with over half of them being Global or Regional Heads of Global Mobility).

A high number of respondents were Global Heads of Global Mobility (31.5%) and 20% were Regional/ Country Heads of Global Mobility. A further 33.8% were Global Mobility Managers and 14.8% were Global Mobility Assistants.

Caseload

One question that is often posed and debated by Global Mobility professionals is what the appropriate ratio of assignees per GM professional should be. This is usually referred to as the Caseload Ratio.

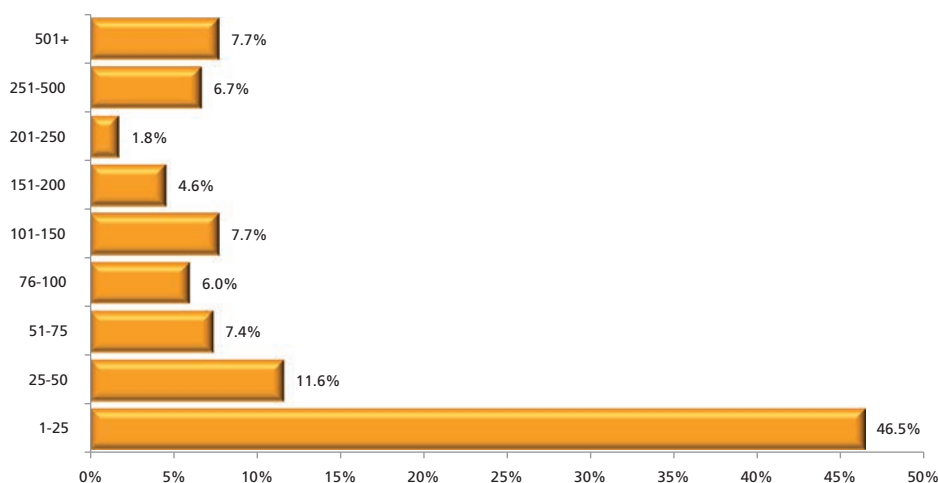
Nevertheless, our survey data has allowed us to draw some tentative observations about benchmark levels of assignee caseload per GM professional.

On a superficial level, this question may appear as an easy one. However, this is quite a difficult question to answer as 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.

In the case of small programs (under 100 assignees), we have observed that the median Caseload Ratio was 16 per head.

For larger programs (over 1000 assignees), the median Caseload Ratio seems to be 75 per head. This means that large programs clearly operate on economies of scale.

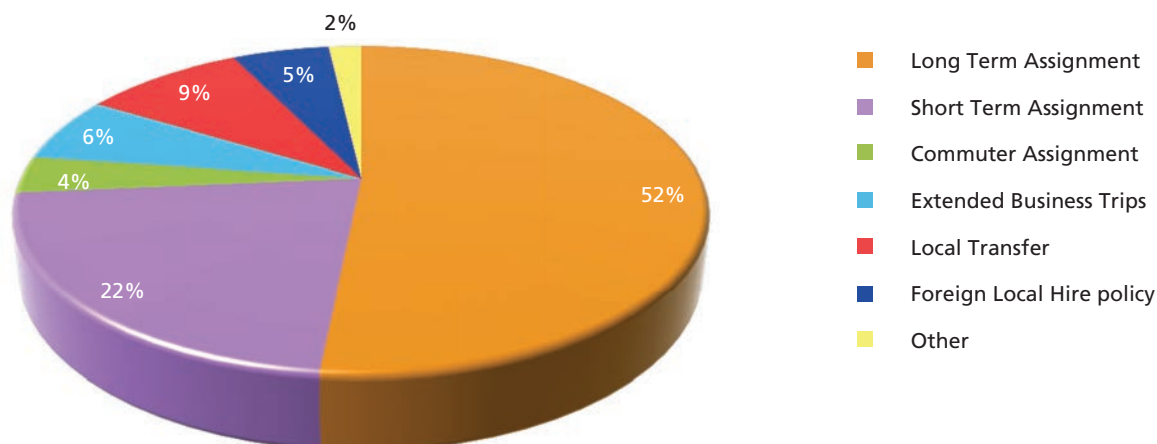
Assignment Initiations in the last 12 months



The graph above shows that over 45% of the respondents initiated between 1 and 25 moves in the last 12 months. 11.6% initiated between 25 and 50 moves and 7.4%

initiated between 51 and 75 moves whilst at the other end of the scale 7.7% of the respondents initiated over 500 assignments last year.

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. However we have seen a rise in the number of other policies to meet strategic and business needs.

Local Transfers make up 9% of the total number of assignments. Extended business trips make up 6%, foreign local hires make up 5% and Commuter Assignments make up just 4%.

Cost of running the Global Mobility Function

Survey participants were asked to indicate their overall pay bill (base salary plus bonus only) for their Global Mobility Team. From this analysis we can estimate that the average cost of running a Global Mobility Team is \$3,008 per assignee. (This is purely the salary/bonus cost only and does not include benefits or establishment overheads).

The inter-quartile range for running a Global Mobility Team is \$1,677 - \$6,314 per assignee.

This year the survey included salary data and as there was a large variation the results have been split between lower quartile, median and upper quartile.

| Summary | Lower Quartile | Median | Upper Quartile |
|----------------------------------|----------------|-------------|----------------|
| Global Mobility Administrator | USD 45,000 | USD 52,000 | USD 71,000 |
| Global Mobility Consultant | USD 60,000 | USD 75,000 | USD 90,000 |
| Global Mobility Manager | USD 75,000 | USD 100,000 | USD 120,000 |
| Regional Head of Global Mobility | USD 100,000 | USD 120,000 | USD 150,000 |
| Head of Global Mobility | USD 130,000 | USD 160,000 | USD 200,000 |

In addition to salary data the survey looked at the bonus structure of Global Mobility professionals. For Global Mobility Administrators, Consultants and

Managers the highest percentage detailed the bonus as between 0 – 10% of base salary.

| Summary | 0% - 10% | 11% - 25% | 26% - 50% | Other |
|----------------------------------|----------|-----------|-----------|-------|
| Global Mobility Administrator | 86.70% | 8.30% | 0.00% | 5.00% |
| Global Mobility Consultant | 76.20% | 19.00% | 0.00% | 4.80% |
| Global Mobility Manager | 50.00% | 41.70% | 4.80% | 3.60% |
| Regional Head of Global Mobility | 34.00% | 44.00% | 14.00% | 8.00% |
| Head of Global Mobility | 18.00% | 39.30% | 34.80% | 7.90% |

Whereas for Global Mobility Heads, or Regional Heads, the highest percentage of respondents detailed the bonus as between 11% – 25% of base salary.

Future outlook

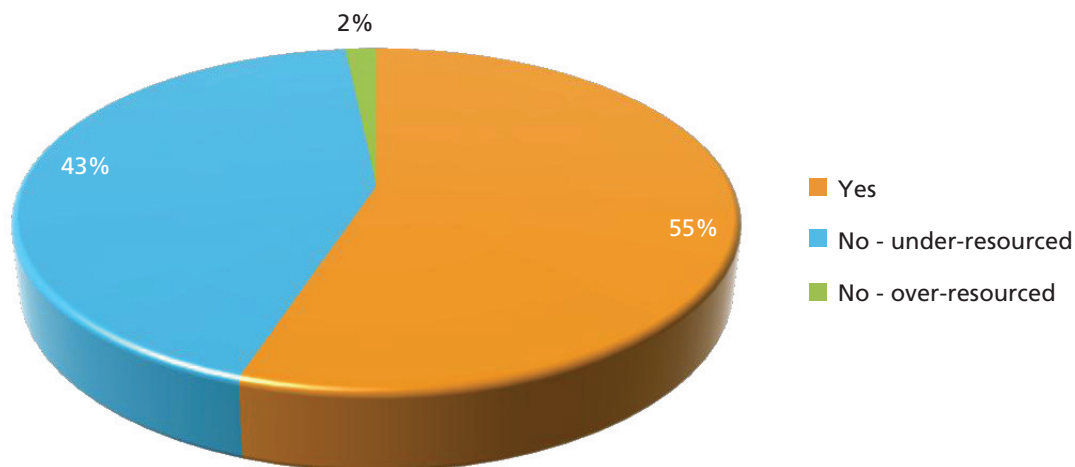
Over the next 12 months, do you expect the number of people in your Global Mobility Team to:



According to these results, a clear majority of the respondents believed that the number of people working in their Global Mobility Team would remain the same over the next 12 months. This is up 7% from last year. 17% of the respondents thought that the number of people working in their Global Mobility Team would increase slightly. This is down 12% from last year. 2% thought there would be a significant increase – this is slightly lower than last year.

There is a 4% increase, from last year, in the number of respondents that thought the number of people working for their Mobility Team would reduce slightly over the next 12 months and only 1% of the respondents this year thought the number of people working in their Global Mobility Team would decrease significantly.

Is your Global Mobility function resourced correctly?

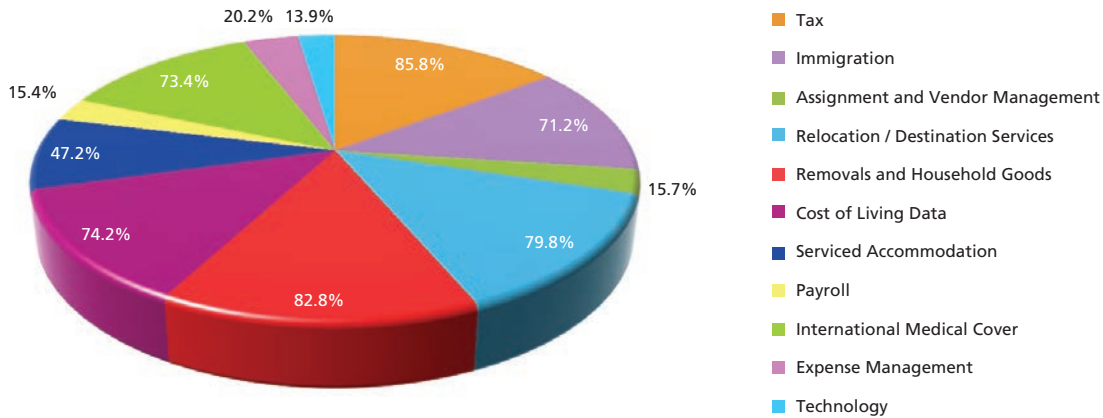


The survey respondents were asked if they felt their Global Mobility Function was resourced correctly. Over half felt they were resourced correctly and 43% felt they were under-resourced. Only 2% believed they were over-resourced.

5. Outsourced Services

Many organizations outsource Global Mobility functions to other firms. Some do it more than others depending upon program size and various other factors. In this section we analyze various services that organizations outsource (e.g. 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

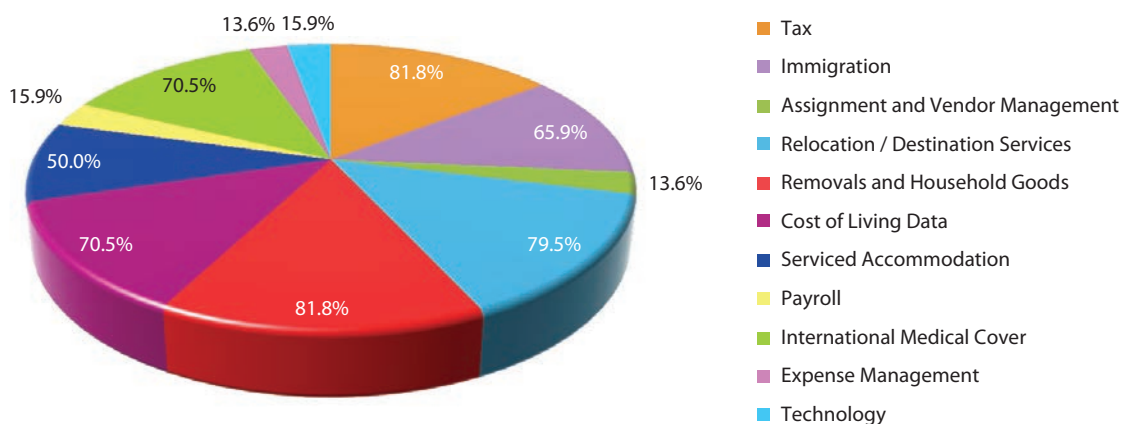


85.8% of respondents outsource Tax, closely followed by nearly 82.8% of respondents outsourcing Removals and Household Goods. The next four highly outsourced services were Relocation/Destination Services (79.8%), Cost of Living Data (74.2%), International Medical Cover (73.4%) and Immigration (71.2%).

Just under half outsourced serviced accommodation. Expense Management was outsourced by 20.2% of the respondents. The three services outsourced least by respondents were Assignment and Vendor Management (15.7%), Payroll (15.4%) and Technology (13.9%).

Are outsourced services influenced by program size?

Outsourced Services – Large Programs



It is interesting to see that when compared to the average of all the programs, large companies seem to outsource fewer services apart from when it comes to Technology and Payroll Services where they outsource more. They outsource less of their Tax services (decreased by 4%), Immigration services (decreased by 5.3%), Assignment and Vendor Management services

(decreased by 2.1%), Relocation/Destination Services (decreased by 0.3%), Removals and Household Goods (decreased by 1%), Cost of Living Data (decreased by 3.7%), Serviced Accommodation (decreased by 2.8%), International Medical Cover (decreased by 2.9%), and Expense Management (decreased by 6.6%).

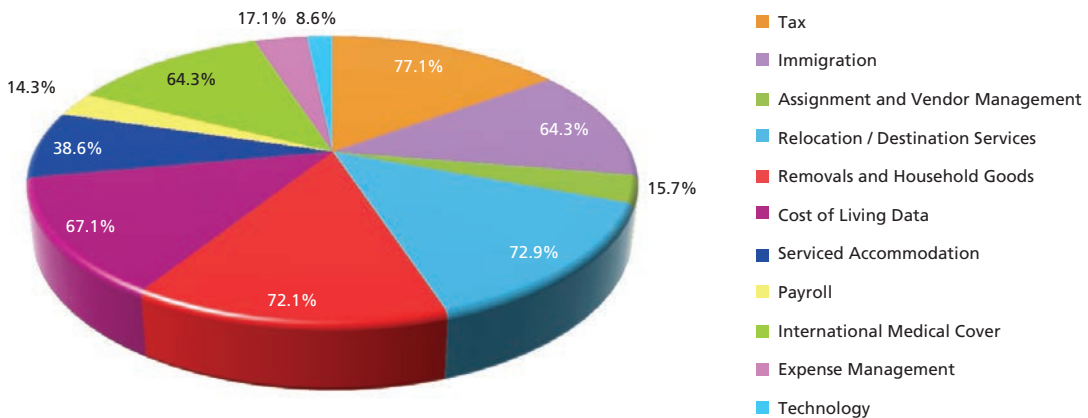


Interesting fact:

Organizations with large programs outsource less except for Technology and Payroll Services where they outsource more.

The figures change again for small programs.

Outsourced Services – Small Programs



Compared to the figures reported for the whole survey population, organizations with relatively small programs tend to outsource less across all service areas apart from Assignment & Vendor Management where they outsource the same percentage. They outsource less of their Tax services (decreased by 8.6%), Immigration services (decreased by 6.9%),

Relocation/Destination Services (decreased by 6.9%), Removals and Household Goods (decreased by 10.6%), Cost of Living Data (decreased by 7%), Serviced Accommodation (decreased by 8.6%), Payroll (decreased by 1.1%), International Medical Cover (decreased by 9.1%), and Expense Management (decreased by 3.1%), Technology (decreased by 5.3%).



Interesting fact:

Organizations with relatively small programs outsource less of their assignment services. This is a complete change from last year where small programs were outsourcing more of their assignment services.

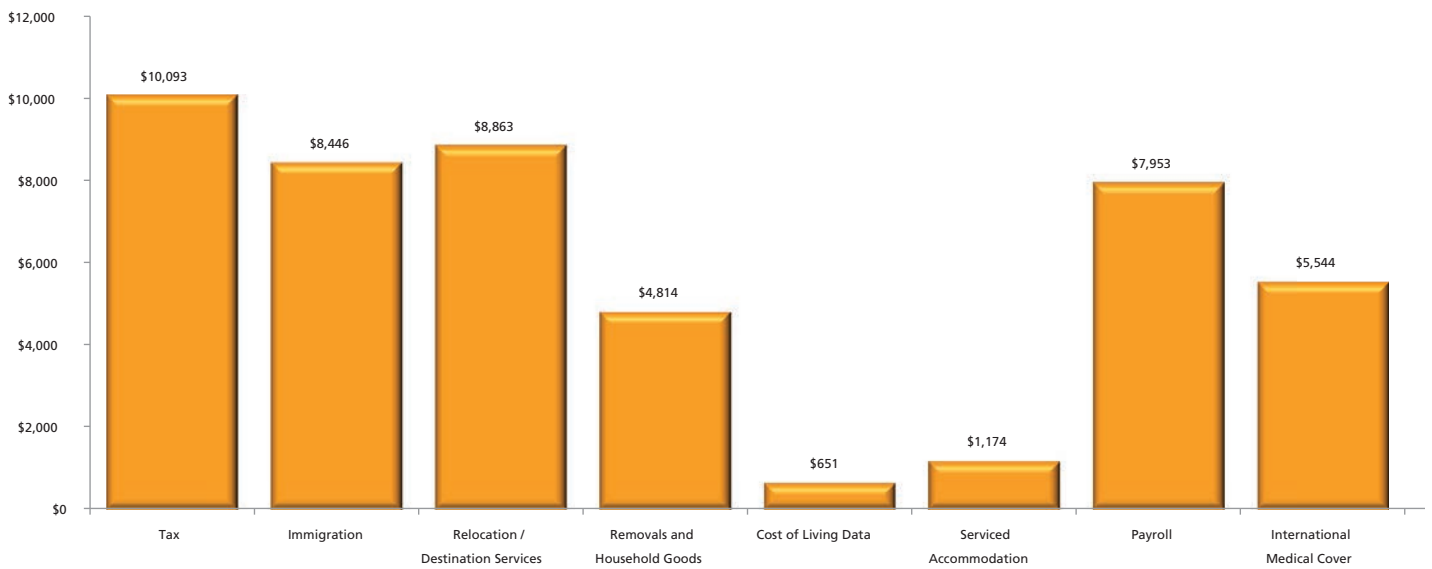


Detailed Analysis

The data obtained from our survey reveals a rough estimate of the costs of different services (e.g. Tax) per assignee. It also delves further and looks at the estimate per assignee in relation to program size. 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. The amount spent on tax services includes the amount spent on preparation of tax returns and on tax consulting projects.

Cost per Assignee for Small Programs (less than 100 Assignees)

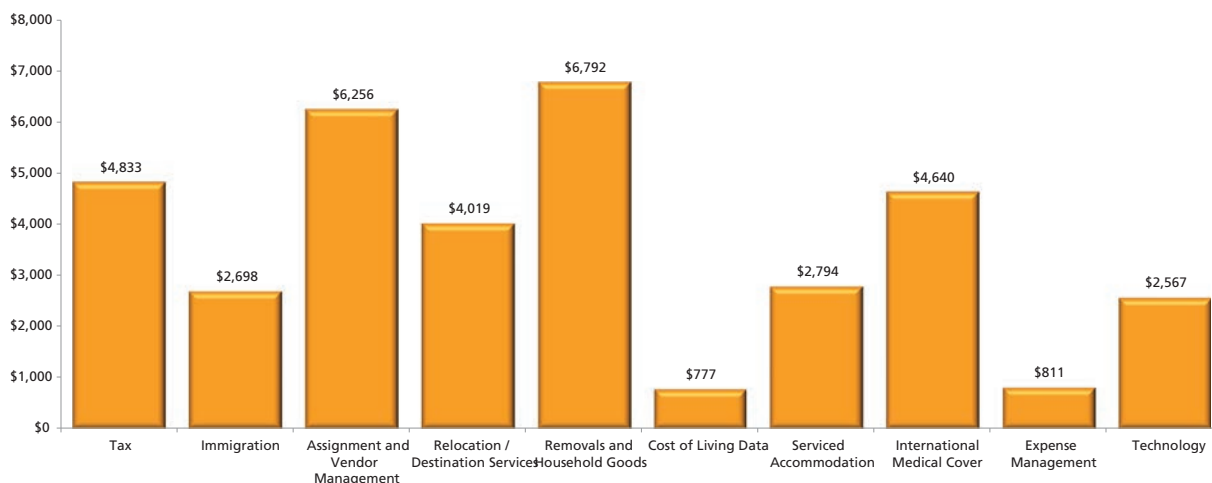


This bar chart shows the difference in costs for small programs in relation to the different areas of assignment management. As shown, Tax is the highest cost service with an average of \$10,093 per assignee, followed by Relocation/Destination Services with an average of \$8,863 per assignee and Immigration at \$8,446 per assignee. Cost of Living Data is the lowest cost for assignees on small programs with an average cost of \$651 per assignee.

The average costs for the other services in relation to small programs include Payroll of \$7,953 per assignee, International Medical Cover of \$5,544 per assignee, Removal/Household Goods cost of \$4,814 per assignee and Serviced Accommodation with an average of \$1,174 per assignee.

Please note, there was insufficient data to provide average costs for Assignment and Vendor Management, Expense Management and Technology.

Cost per Assignee for Medium Programs (100 – 1000 Assignees)

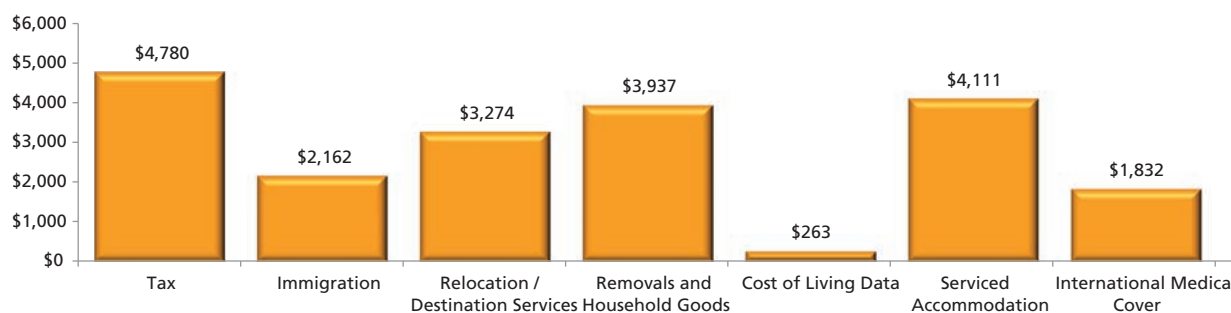


There are however some changes in the data regarding the cost per assignee for programs with 100-1000 assignees. Almost all costs for different areas of assignment management have fallen (including Tax, Immigration, Assignment/Vendor Management, Relocation/Destination Services and International

Medical Cover). Surprisingly, the costs of Removals and Household Goods, Cost of Living Data and Serviced Accommodation have increased in comparison to small programs. Please note, there was insufficient data to provide average costs for Payroll.

Interesting fact: Organizations with medium programs spend less per assignee on the various assignment services than organizations with small programs. This is most significant when looking at Tax services, Immigration and Assignment & Vendor Management.

Cost per Assignee for Large Programs (more than 1000 Assignees)



In large programs all costs have fallen. Interestingly, the cost of Tax (\$4,780) is under half of the cost when comparing it to small programs (\$10,093). Immigration was the least costly for assignees in large programs with an average of \$2,162.

Please note, that there was insufficient data provided to analyze an average cost per assignee for Assignment and Vendor Management, Payroll, Expense Management and Technology.

Interesting fact: Organizations with large programs spend under half of the amount of money on Tax services that small programs do.

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 below show the lower quartile, the median and the upper quartile of the costs reported:

| Tax Services | Lower Quartile | Median | Upper Quartile |
|---|----------------|-----------|----------------|
| A US Tax Return (in USD) | USD 1,325 | USD 1,750 | USD 2,000 |
| A Cost Projection (in USD) | USD 575 | USD 750 | USD 1,000 |
| An entry/exit meeting (in USD) | USD 500 | USD 500 | USD 700 |
| A Tax Equalisation calculation (in USD) | USD 450 | USD 575 | USD 844 |
| A UK Tax Return (in GBP) | GBP 913 | GBP 1,200 | GBP 1,950 |

The tax services data varies considerably, with some organizations paying 50% more than others for a US Tax Return and a Cost Projection, and more than double for a UK Tax Return. There are some notable differences between the various firms in the range of fees charged.

The range of fees charged by relocation service providers for standard services varies considerably.

| Relocation Services | Lower Quartile | Median | Upper Quartile |
|--|----------------|------------|----------------|
| A set up fee for your relocation management service provider | USD 500 | USD 750 | USD 1,395 |
| A monthly fee for your relocation management service provider | USD 100 | USD 125 | USD 250 |
| A repatriation fee for your relocation management service provider | USD 500 | USD 723 | USD 1,238 |
| The cost of shipping a 20ft container between Europe and the US (in USD) | USD 9,025 | USD 12,250 | USD 15,000 |
| A typical home search in a major city (USD) | USD 1,500 | USD 2,000 | USD 3,000 |

The range of fees charged by relocation service providers for standard services varies considerably between the lower and upper quartiles.

| Immigration Services | Lower Quartile | Median | Upper Quartile |
|--------------------------|----------------|-----------|----------------|
| A standard US visa (USD) | USD 1,250 | USD 2,500 | USD 3,500 |

The immigration services have a large interquartile range of \$1,250 and \$3,500.

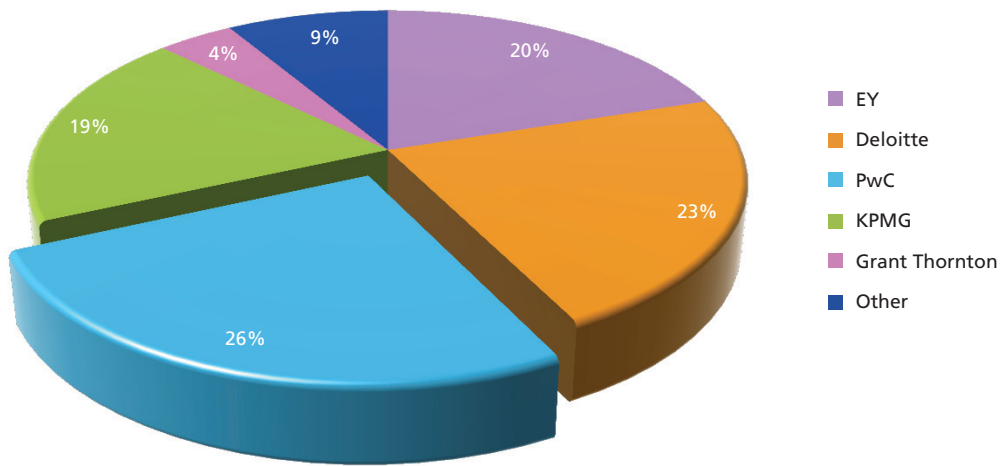
6. Market Share Analysis

This section of our study explores the market share of the major service providers in the Global Mobility Market. Various fields of outsourced services have been analyzed (including Tax, Immigration, Assignment and Vendor Management, Relocation/Destination Services, Removal/Household Goods, Cost of Living Data, Serviced Accommodation, Payroll, International Medical Cover, Expense Management and Technology).

Our market share analysis is based solely on responses received rather than assignee volumes.

Tax

Market Share



In terms of the market share of the tax firms, PricewaterhouseCoopers, like last year, has the largest slice of the market share with just over a quarter, followed by Deloitte with 23%. EY occupies 20% market share, followed by KPMG with 19%.

Interestingly, Grant Thornton has 4% of the market share. Other firms in the business account for 9% market share. This is up by 1% from last year indicating that other firms are still creeping into the market that is dominated by the big four.

Other firms used by the survey respondents include:

Adelaide Financial Inc, Arthur Cox, Baker Tilly, BDO, Boxx, Fidal, Freed Maxick, Global Tax Network, High Street Partners, James Cowper, John Allis & Co, and Nexia.

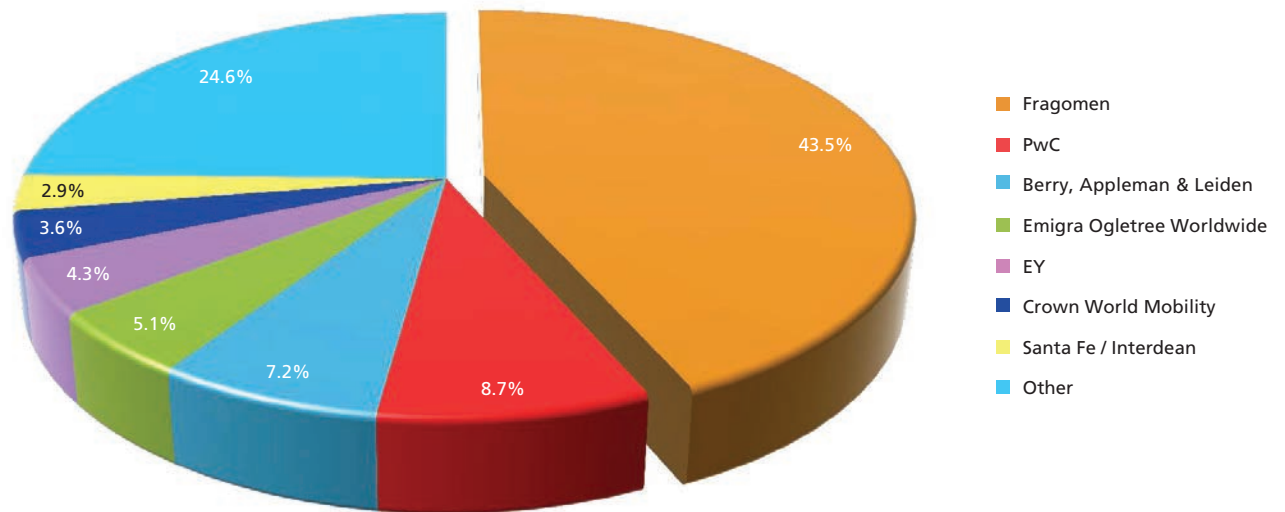
Top 5 Service Providers by Market Share

- 1 PricewaterhouseCoopers
- 2 Deloitte
- 3 EY
- 4 KPMG
- 5 Grant Thornton

Interesting fact:

- 1) Although the tax market is dominated by the Big Four, there is clear evidence that some of the smaller firms are making inroads, especially into the small programs category.
- 2) PricewaterhouseCoopers is the clear market leader with Deloitte a close second.

Immigration Market Share



The global market for Immigration services is dominated by Fragomen with a dominating 43.5% market share. Outside of Fragomen, PwC have 8.7% of the market share, BAL have 7.2%, Emigra Ogletree have 5.1%, EY have 4.3%, Crown World Mobility have 3.6%, and Santa Fe/Interdean has

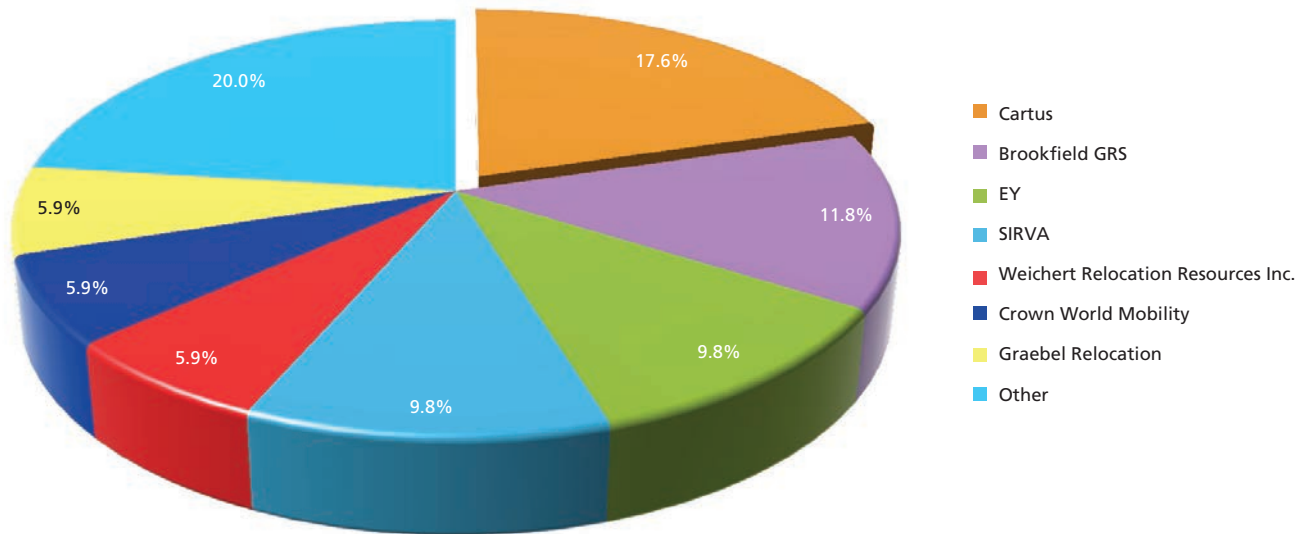
2.9% of the market share. 24.6% of respondents reported using 22 different firms which have 2% or less of the market share.

| Top 5 Service Providers by Market Share | |
|---|---------------------------|
| 1 | Fragomen |
| 2 | PricewaterhouseCoopers |
| 3 | Berry, Appleman & Leiden |
| 4 | Emigra Ogletree Worldwide |
| 5 | EY |

Other firms used by the survey respondents include:

Baker and McKenzie, Blank Rome, Brookfield GRS, Epstein, Becker & Green, Evans Wallace, Fisher & Phillips LLP, FosterQuan LLP, Garfinkel Immigration Law Firm, Green & Spiegel, Human Entrance, ICUNet, KPMG, Morgan Lewis, Myers Thompson, Pearl Law Group, ProLink GLOBAL, Pryor Cashman, Rudnick Spector, Seyfarth Shaw LLP, SIRVA, Sterling, Team Relocations.

Assignment/Vendor Management Market Share



Cartus has a market share of 17.6%, Brookfield GRS follows with 11.8%. EY and SIRVA both have 9.8%.

These four are followed by Weichert, Crown World Mobility and Graebel Relocation all with 5.9%.

Top 4 Service Providers by Market Share

- 1 **Cartus**

- 2 **Brookfield**

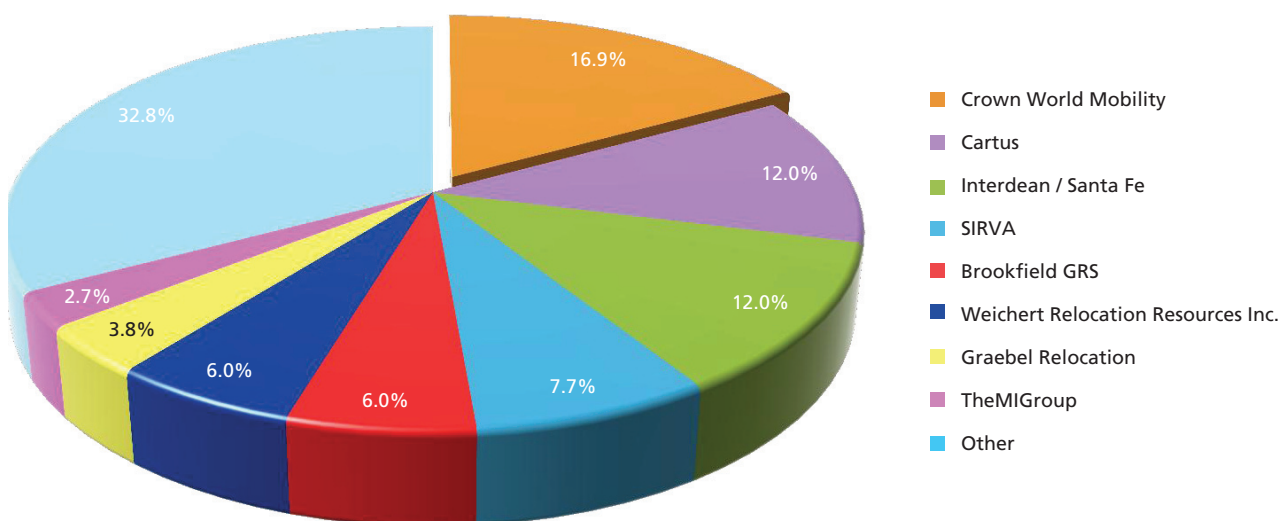
- 3 **EY**
SIRVA

- 4 **Crown World Mobility**
Weichert Relocation Resources Inc
Graebel Relocation

Other companies that our respondents use include:

Altair Global Relocation, Deloitte, High Street Partners, KPMG, Lexicon Relocation, Mobility Services International, NEI Global, Pickfords, Plus Relocation, Santa Fe/Interdean, Sterling, TheMIGroup, Xchanging HR Services.

Relocation/Destination Services Market Share



Crown World Mobility has highest market share with 16.9%, Cartus and Interdean/Santa Fe both have 12% market share. SIRVA follows with 7.7% and Brookfield and Weichert both have 6% market share. These

companies are closely followed by Graebel Relocation with 3.8% and TheMIGroup with 2.7% market share.

Top 5 Service Providers by Market Share

- 1 **Crown World Mobility**

- 2 **Cartus**
Interdean/Santa Fe

- 3 **SIRVA**

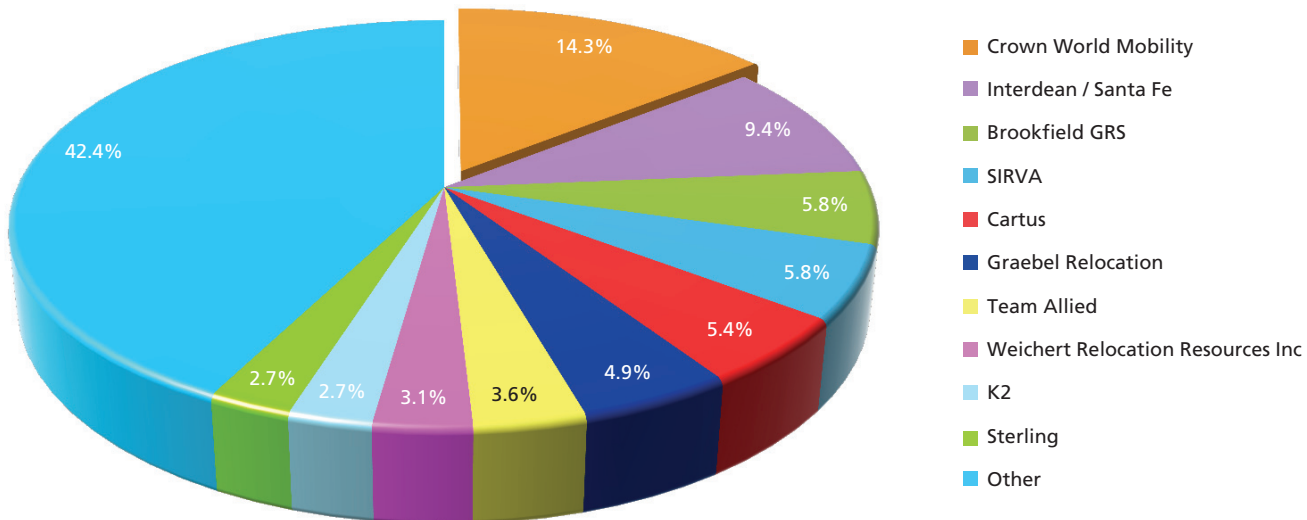
- 4 **Brookfield GRS**
Weichert Relocation Resources Inc

- 5 **Graebel Relocation**

Other companies that our respondents use include:

AIReS, Allied Pickfords, Altair Global Relocation, Atlantic NOS Relocations, Bristol Global Mobility, CapRelo, Continuum, CORT, Elite, Excel International, Ez-Entry, Fry-Wagner, Global Adjustments, Human Entrance, ICC, International Relocations Management, IOR, IPR, K2, Kent Moving, Lexicon Relocation, Mobility Services International, NEI Global Relocation Services, Nucompass Mobility Services, Plus Relocation, Relocation Center, Relocation Resources, ReloJapan, Robinson Relocation, Schweizer Relocation, Sterling, Suddath, Team Relocation, TransferEase, UniGroup, United Van Lines, Welcome Home, Worldwide Relocation Specialists, Wridgways.

Removals and Household Goods Market Share



Crown World Mobility has market share of 14.3%, Cartus has 9.4%, Brookfield and SIRVA have a market share of 5.8%, and Cartus follow with 5.4% market share. Graebel Relocation have 4.9%, Team Allied have 3.6%, Weichert 3.1%, and K2 and Sterling both have 2.7% market share. The rest of the firms make up the remaining 42.4%. Thus, the market for Household

Goods Services is shared by a lot of service providers unlike the tax market where the majority part of the market is dominated by the Big Four companies and only a small proportion is shared by other smaller firms.

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

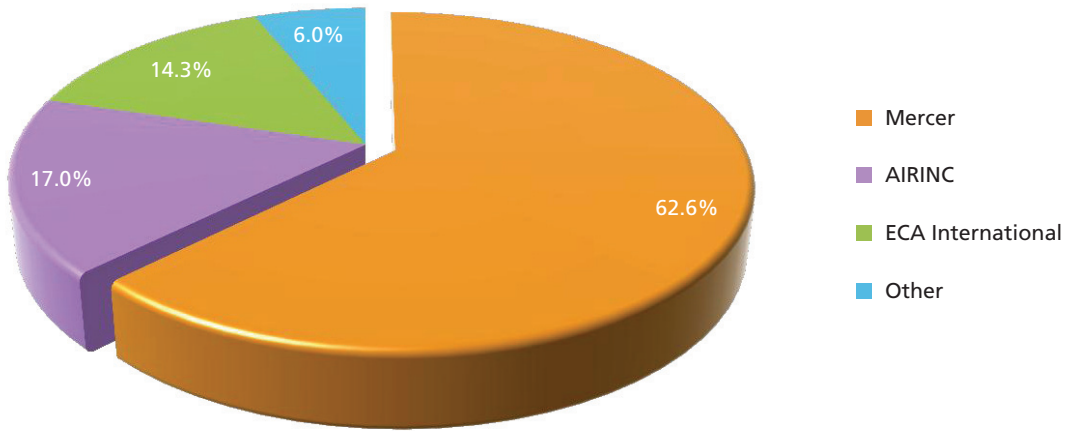
Top 5 Service Providers by Market Share

- 1 Crown World Mobility
- 2 Interdean / Santa Fe
- 3 Brookfield GRS
SIRVA
- 4 Cartus
- 5 Graebel Relocation

Other companies that our respondents use are:

AGS Worldwide Movers, AIReS, Alexander's, Allied Pickfords, Altair Global Relocation, AMS, Armstrong International Movers, Arpin, Asian Tigers, Aspire Mobility, Bristol Global Mobility, CapRelo, Champion International, Clark & Reid, Continuum, Daryl Flood, Excel International, GB Liners, Ginter, Grace, Grospiron, Harrow Green, Human Entrance, Intermovers, International Relocations Management, ISS Movers, Kent Movers, Lexicon Relocation, Mobel Transport, NEI, Nelson Westerberg, New World Van Lines, Nippon Express, North American Van Lines, OSS Movers, Paramount, Prestige, Robinsons Relocation, RSI, S&M Moving, Seegmuller, Siracusa, Suddath, The Relocation Center, TheMIGroup, TNT, Unigroup, United Van Lines, UTS, Wayne Moving & Storage, Worldwide Relocation Specialists, Wridgways.

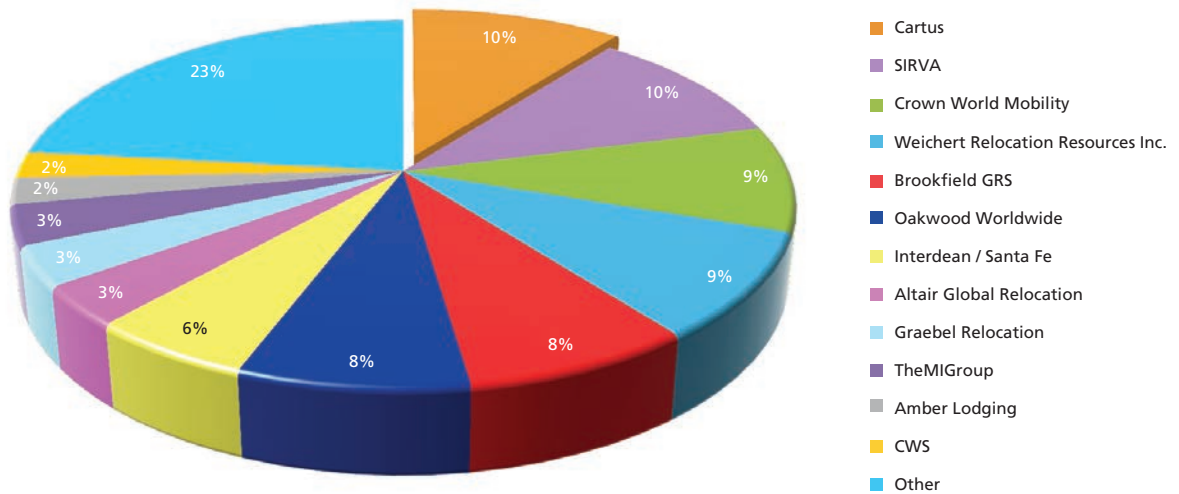
**Cost of Living Data
Market Share**



Mercer has market share of 62.6%, AIRINC has 17%, and ECA have 14.3% market share. The rest of the firms make up the remaining 6%. These firms were

listed as AON Hewitt, Cartus, Crown World Mobility, EY, Eurocost, High Street Partners, K2, KPMG, Syner Expat, Towers Watson and Weichert.

**Serviced Accommodation
Market Share**



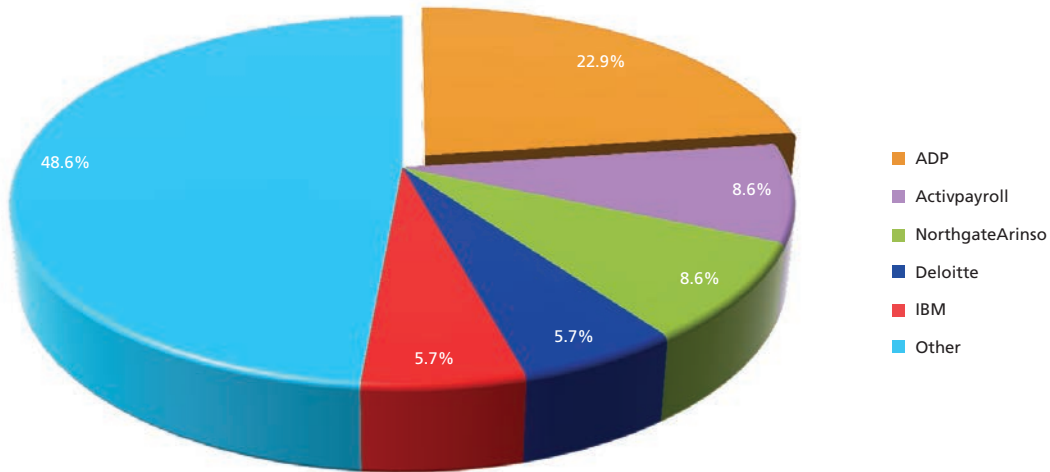
When looking at the results, it is clear that many people use a relocation provider to source their serviced accommodation. So in many cases the reference to a service provider includes their network of independent suppliers.

Cartus and SIRVA had the largest market share, both with 10% each. Crown World Mobility and Weichert had 9% market share each, and Brookfield and Oakwood have 8% market share each. Interdean/ Santa Fe had 6% market share. Altair Global

Relocation, Graebel Relocation and TheMIGroup, all have 3% market share. Amber Lodging and CWS both have 2% of the market share.

Other companies that our respondents use are: AIReS, Airways Serviced Apartments, BridgeStreet, Bristol Global Mobility, Executive Quarters, Frasers Hospitality, Human Entrance, IRM, KPMG, Lexicon, NEI, Quest, Regus, Select Apartments, Silverdoor, Sterling, Suite America, Team Relocation, The Apartment Service Company and TransferEase Relocation Inc.

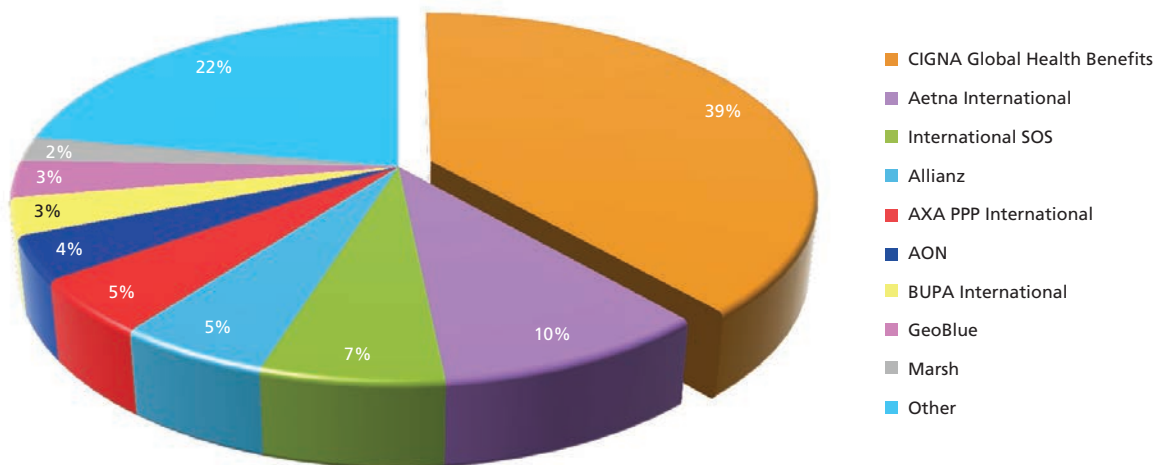
**Payroll
Market Share**



There were some clear market leaders when it came to payroll service providers. ADP had 22.9% of the market share followed by Activpayroll and Northgate Arinso with 8.6% each and Deloitte and IBM with 5.7% each.

Other companies that our respondents use are: Accenture, Cartus, Celergo, Cox, Equiniti, EY, FESCO, Grant Thornton, High Street Partners, KPMG, Micropay, Pasona, Paylocity, Polaris, PwC, SIRVA, TheMIGroup.

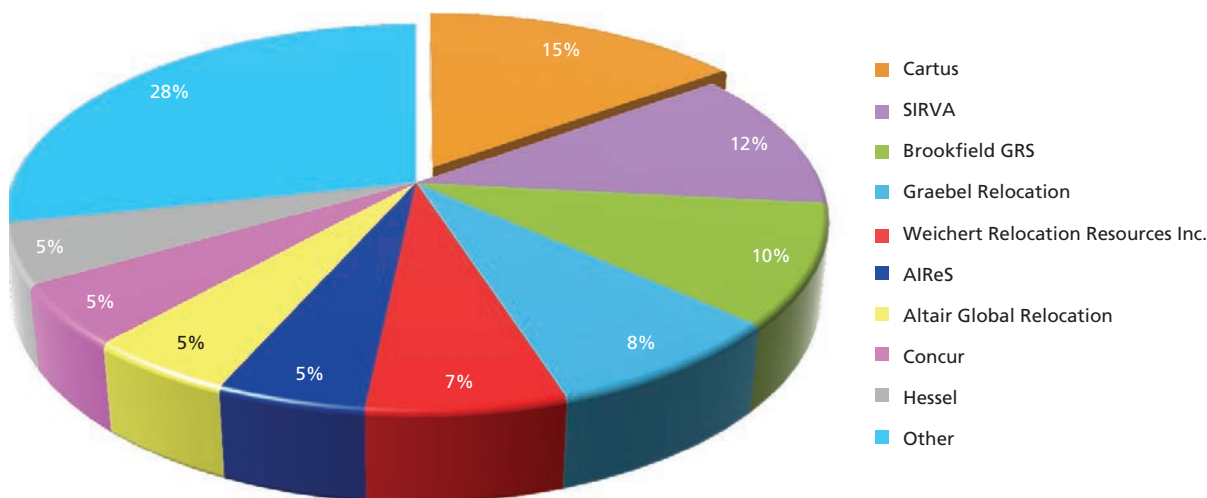
**International Medical Cover
Market Share**



CIGNA Global Health Benefits had the clear largest market share with 39%. Aetna International had 10% followed by International SOS with 7% of the market share. Allianz and AXA PPP International had 5% market share each, and AON had 4% market share. BUPA International and GeoBlue both had 3% market share and Marsh had 2% market share.

Other companies that our respondents stated they used are: ACE, Aia Health Insurance, AIG, Aviva, AWC, Chartis, Daman Health Insurance, Deutscher Ring, DKV Globality, GMC Services International, GOUDA, GUC, HTH, Lombard, MSH International, Nippon Life Insurance, Previnter, Southern Cross, SSQ, Sun Life (Canada), Tata AIG, Uniga, United Healthcare, Van Breda International, Verspieren, Welcare, XN Global.

Expense Management Market Share



When looking at the results, it is clear that many people use a relocation provider or an assignment and vendor management provider to manage the assignee's expenses.

Cartus have the largest market share with 15%, SIRVA have 12% market share, and Brookfield have 12%. Graebel Relocation has 8%, Weichert has 7%, while Aires, Altair, Concur and Hessel all have 5% market share each.

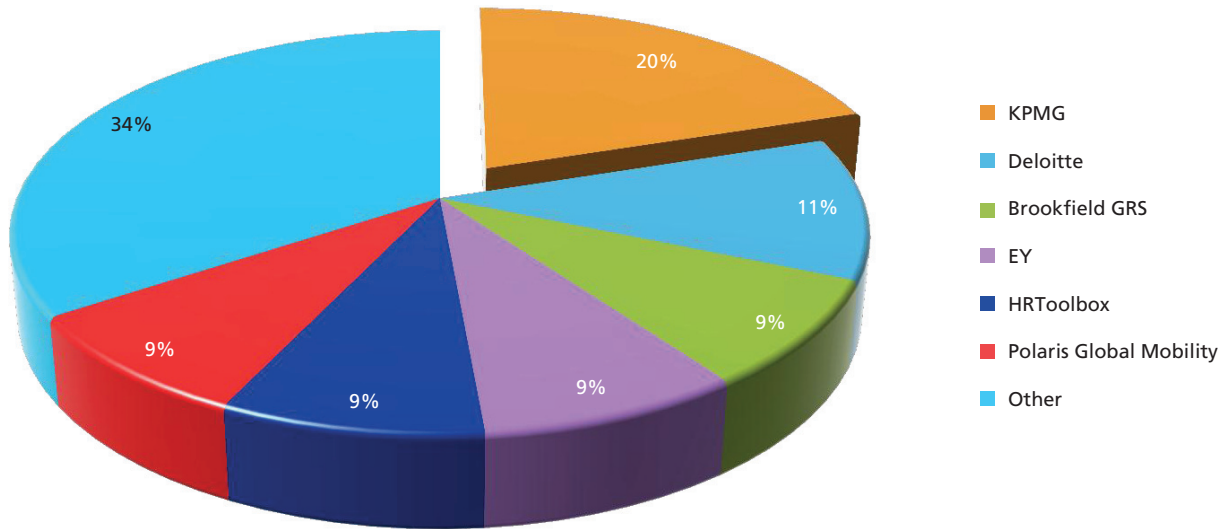
Top 5 Service Providers by Market Share

- 1 **Cartus**
- 2 **SIRVA**
- 3 **Brookfield GRS**
- 4 **Graebel Relocation**
- 5 **Weichert Relocation Resources Inc**

Other companies that our respondents use are:

Crown World Mobility, High Street Partners, Human Entrance, IBM, KPMG, Lexicon Relocation, Mobility Services International, NEI, Pasona and TheMIGroup.

**Technology
Market Share**



With a total of 20% of the market share KPMG is market leader for Technology. Deloitte has 11% of the market share and Brookfield GRS, EY, HRToolbox and Polaris Global Mobility all have 9% of the market share each.

Cartus, Crown World Mobility, Equus Software, Graebel Relocation, High Street Partners, Mercer, Plus Relocation, PwC, and SIRVA have a combined market share of 34%.

7. Vendor Management

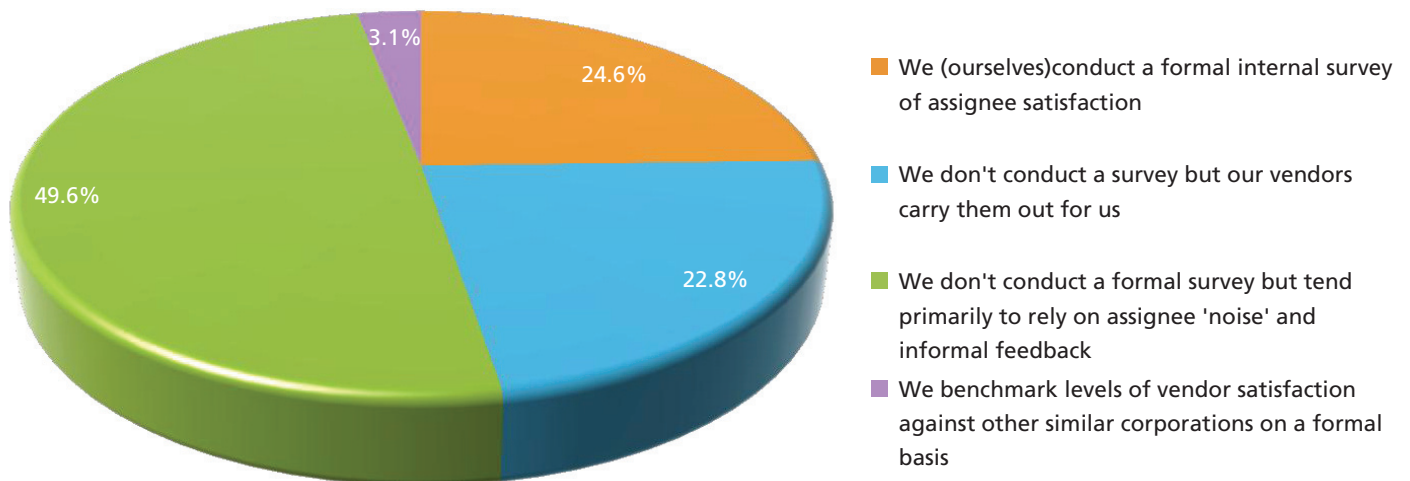
Vendor Management is one of the key challenges facing any global mobility professional (both corporate and service provider). This section analyzes the way in which companies manage their service providers. We also report our findings on how vendors are perceived against industry standards.

For the purpose of this section, we have analyzed Vendor Performance both in overall terms and by service provider for example Relocation Management, Tax and etc.

This section is based on the views respondents submitted on over 195 service providers. A full list of service providers mentioned by respondents is included at Appendix B.

General Overview

How do companies monitor vendor performance?



When asked how their organizations managed their vendor performance, the highest share (49.6%) of respondents said they did not conduct a formal survey but tended to rely on assignee 'noise' and informal feedback. This is up from 47.6% from last year. 24.6% said they conduct a formal internal survey of assignee

satisfaction. This is up 2% from last year. 22.8% reported that their vendors conducted a survey for them. This is down 5.2% from last year. Only 3.1% said they formally benchmarked levels of vendor satisfaction against other similar corporations. This is up 1.9%.



Interesting fact:

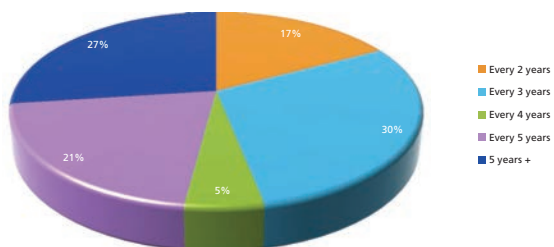
Nearly half of organizations rely solely on informal feedback from their assignees and have no formal procedure in place to keep a tab on the service standards of their vendors.



In the survey, respondents were asked about how often they conduct a formal RFP for their major vendors. Results are shown in the chart below.

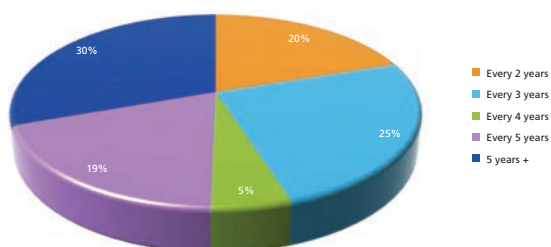
How often do you go out for RFP to the Tax service providers?

The most common response among the respondents (30%) was to go out to formal RFP for major vendors every 3 years.



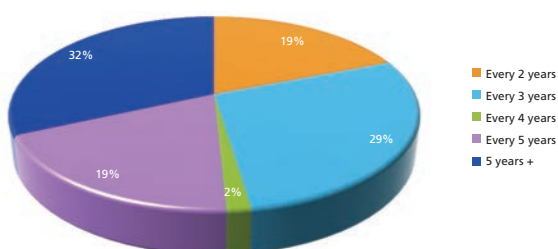
How often do you go out for RFP to the Immigration service providers?

For immigration service providers, 30% of our respondents leave it more than five years to go out to RFP although a quarter go out to RFP every 3 years.



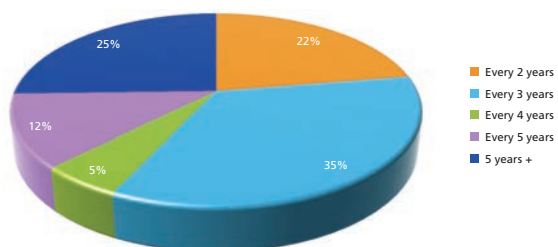
How often do you go out for RFP to the Assignment and Vendor Management service providers?

Almost a third of our respondents leave it more than five years before they go out for RFP to the Assignment and Vendor Management Service Providers.



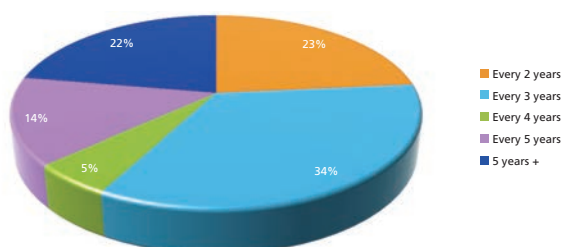
How often do you go out for RFP to the Relocation/Destination services providers?

35% of the survey respondents go out for RFP to the Relocation/Destination service providers every 3 years.



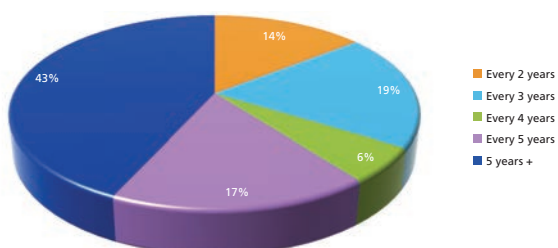
How often do you go out for RFP to the Removals and Household Goods service providers?

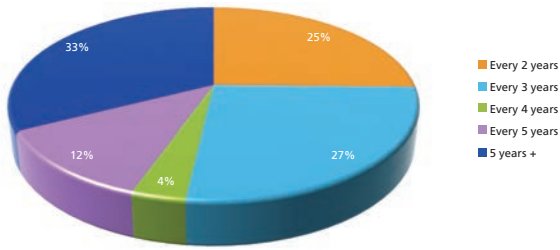
34% of the survey respondents go out for RFP to the Removals and Household Goods service providers every 3 years. 23% go out for RFP every 2 years and 22% leave it over 5 years.



How often do you go out for RFP to the Cost of Living data providers?

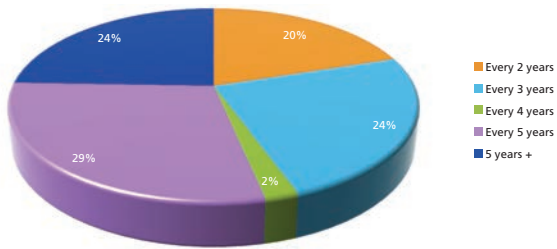
43% of the survey respondents leave the RFP for the Cost of Living data providers for more than 5 years.





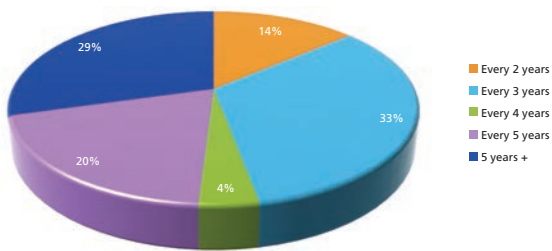
How often do you go out for RFP to the Serviced Accommodation service providers?

33% of the survey respondents go out for RFP to the Serviced Accommodation service providers every 5 years. 27% go out to RFP every 3 years and a quarter go out for RFP every 2 years.



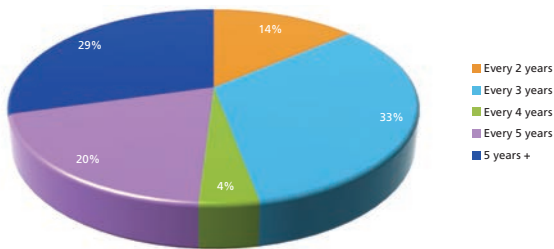
How often do you go out for RFP to the Payroll service providers?

29% of the survey respondents go out for RFP to the Payroll service providers every 4 years. 24% leave it over 5 years and another 24% go out for RFP every 3 years.



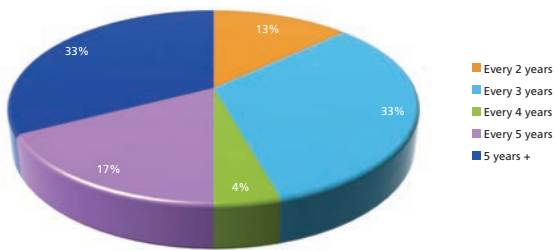
How often do you go out for RFP to the International Medical Cover providers?

A third of respondents go out to formal RFP for their International Medical cover every 3 years.



How often do you go out for RFP to the Expense Management service providers?

A third of the survey respondents go out for RFP to the Expense Management service providers every 3 years. 29% leave it over 5 years, 20% go out for RFP every 5 years and 14% go out for RFP every 2 years.

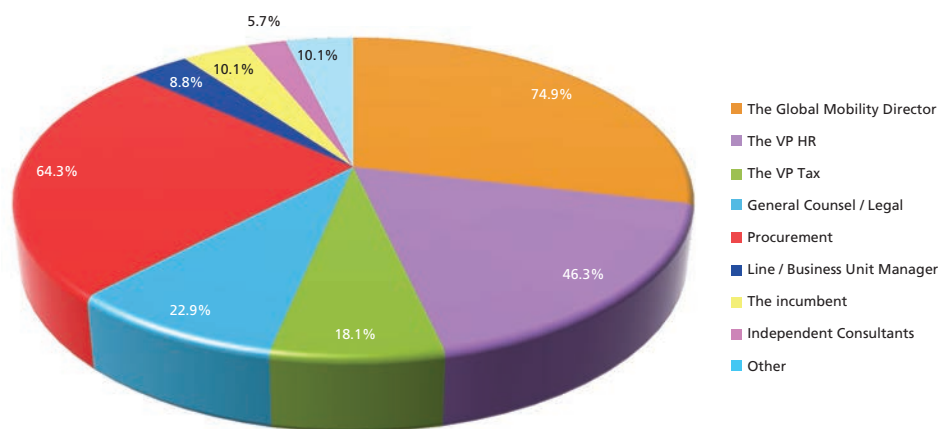


How often do you go out for RFP to the technology providers?

33% of the survey respondents go out for RFP to the Technology service providers every 3 years but another 33% leave the RFP process for more than 5 years. This is unsurprising given the effort involved in changing from one system to another and retraining the team. 17% go out for RFP every 5 years.

The chart below shows who is significantly involved in the process of going out to formal RFP. The data obtained from respondents can be looked at in a greater detail when program size is considered.

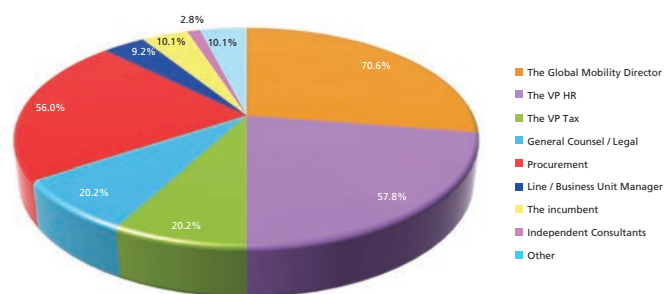
People significantly involved in the RFP process



Detailed Analysis

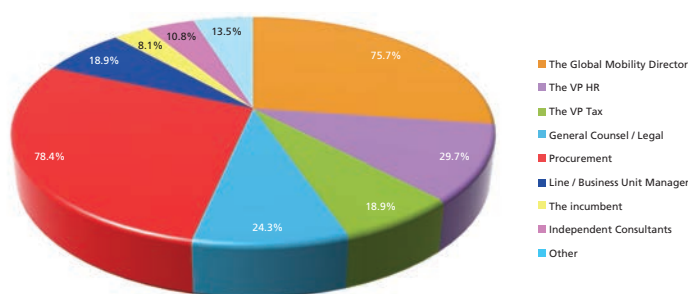
Program size does influence the involvement of particular people in the process as can be seen from the data below.

Small Programs



For small programs the majority of respondents indicated that the people most significantly involved in the process were the Global Mobility Directors (total of 70.6%), VP HR (57.8%) and Procurement (56%). The least involved people in the process were independent Consultants.

Large Programs



For large programs the most significantly involved people in the process, were the Global Mobility Directors (75.7%) and Procurement (78.4%).

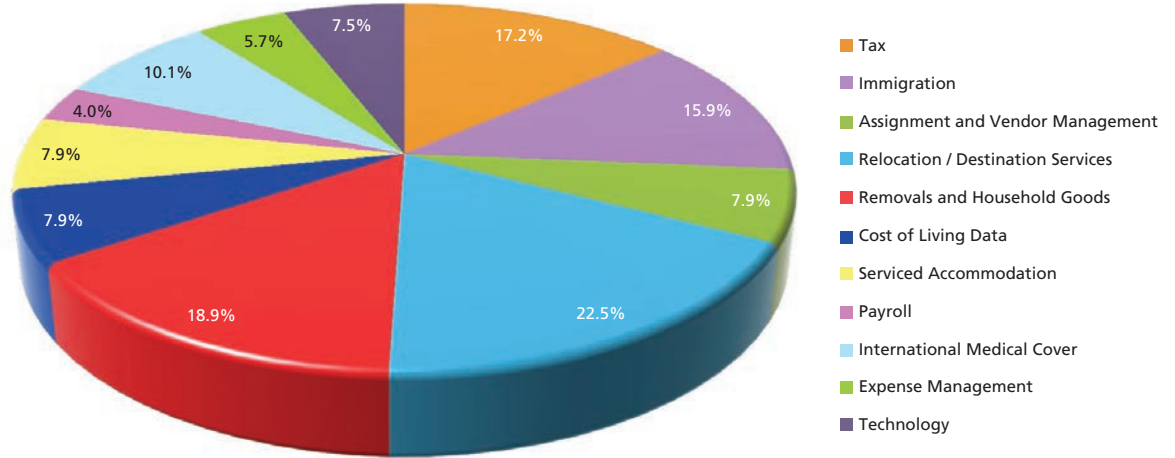
However, the VP HR seemed to play a far less important role in the process with only 29.7% being involved (in comparison to 57.8% in small programs).

Also, 24.3% of the respondents indicated that General Counsel/Legal department was significantly involved in the process – more than included VP Tax in the process.

These results are similar to last year.

RFPs planned for the next 12 months

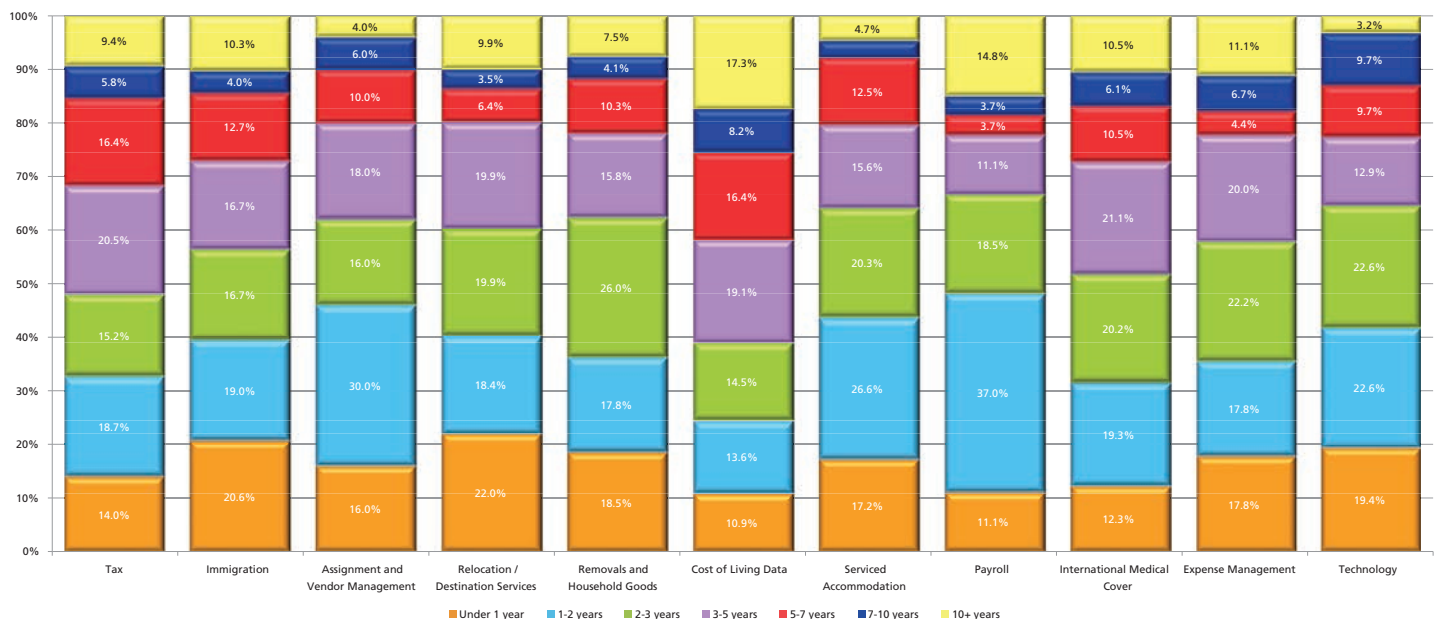
We also asked the question as to what RFP's the respondents were planning in the next 12 months



22.5% of the respondents said that they would be going out for RFP to the Relocation/Destination Services providers, 18.9% to the Removals and Household Goods service providers, 17.2% to the Tax service providers, 15.9% to the Immigration service providers and 10.1% to the International Medical Cover providers. 7.9% or less of the respondents are going out for RFP to the providers of Assignment and Vendor Management, Cost of Living Data, Serviced Accommodation, Payroll, Expense Management and Technology.

The study also investigated how long ago the respondents last changed their major service provider in eleven 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.

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



The best practice for each category seems to be between 3 to 7 years. The smallest percentage was for those organizations that had not changed their service provider for 7-10 years.

There are no striking differences between particular categories in terms of the frequency of switching a major provider. However, there are some visible trends,

i.e. the Cost of Living data providers are less often changed by organizations when compared to the other service providers.

The highest percentage of companies who tend to stick to a major service provider (defined as over every 10 years) was found in the Cost of Living category (17.3%) followed by Payroll (14.8%).

The median period of contract longevity is as follows:

| | |
|----------------------------------|-----------|
| Tax | 3-5 years |
| Immigration | 2-3 years |
| Assignment and Vendor Management | 2-3 years |
| Relocation/Destination Services | 2-3 years |
| Removals and Household Goods | 2-3 years |
| Cost of Living Data | 3-5 years |
| Serviced Accommodation | 2-3 years |
| Payroll | 2-3 years |
| International Medical Cover | 2-3 years |
| Expense Management | 2-3 years |
| Technology | 2-3 years |



Interesting fact:

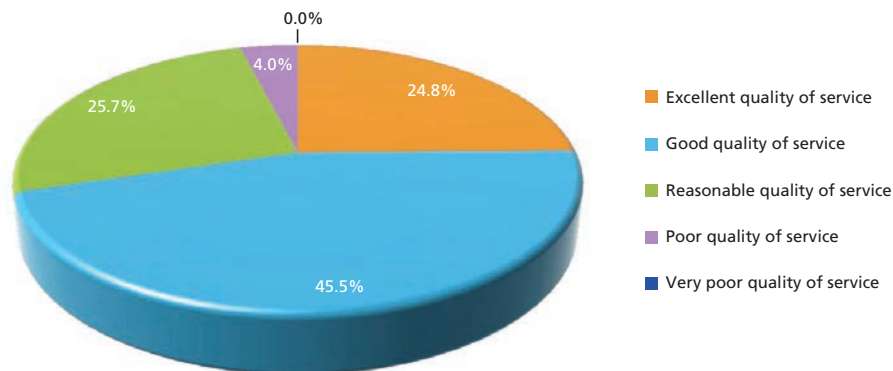
Companies tend to switch their major service provider less often for Tax Services and Cost of Living data than for any of the other service providers.



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 is viewed as good by 45.5% of the respondents. 25.7% thought service was reasonable and 24.8% thought they received an excellent quality of service. Only 4% thought service was poor.

For large programs, 27% of respondents thought that their tax vendors have provided excellent service quality. 45% thought that their tax providers delivered a good

quality of service, 21% thought the service was reasonable and the remaining 6% felt the service level was poor.

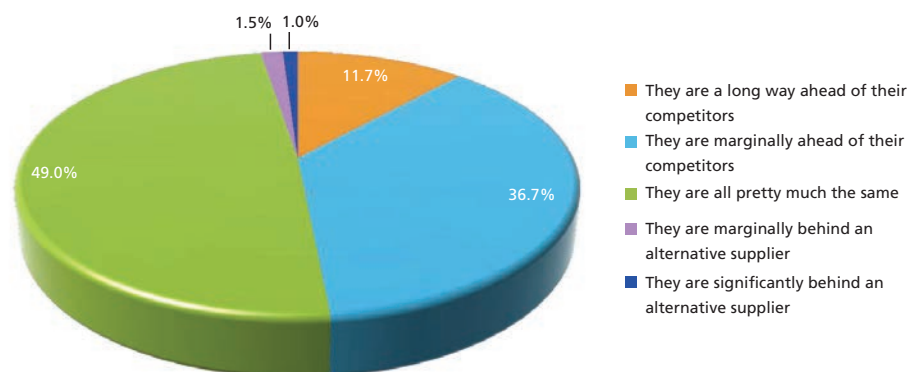
For small programs a total of 29% of the respondents rated the service from their Tax providers as excellent, 40% of respondents felt they received a good quality of service. Over a quarter of the survey participants thought that the quality of service from their tax providers was reasonable. Only 4% thought it was poor.



Interesting fact:

This year it seems that organizations with both large and small programs are almost equally as satisfied in the quality of service from their tax vendors whereas last year survey participants with large programs were more satisfied with their tax vendors in terms of service quality than the survey participants with small programs.

Technical Competence and Professionalism



The respondents thought that in areas of technical competency and professionalism, their tax vendors were providing pretty much the same service quality (49%). A total of 36.7% felt their service provider was slightly ahead of its competitors and 11.7% thought their service provider was a long way ahead. 1.5% thought their vendor was lagging slightly behind an alternative supplier and 1% thought their tax vendor was significantly behind an alternative supplier. Overall these are higher ratings than last year.

An in-depth analysis shows that for large programs a clear majority (56%) of the respondents felt that all the tax service providers were pretty much the same. 38% felt their service provider was marginally ahead of their competitors and 6% felt their service provider was a long way ahead.

For small programs, most of survey participants (51%) thought their tax service providers were all pretty much the same and 12% thought their vendors were



along way ahead of their competitors. 36% of the respondents thought their tax providers were marginally

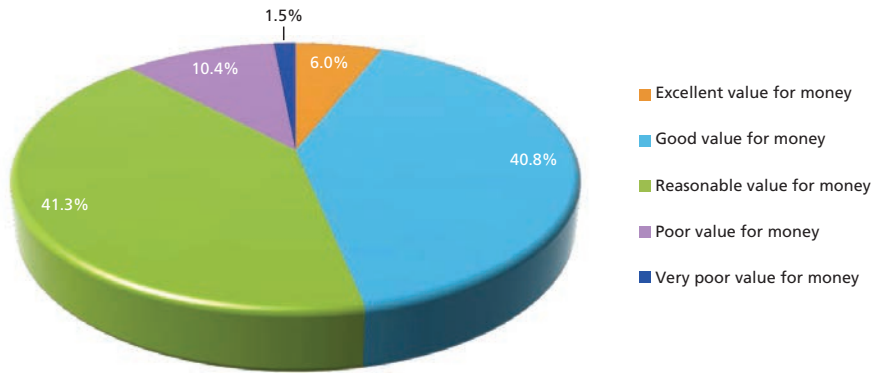
ahead of their competitors and only 1% believed their vendors were significantly behind their competitors.



Interesting fact:

This year it seems that organizations with both large and small programs have a similar belief in the competence and professionalism of their tax vendors whereas last year survey participants with large programs had a stronger belief in the competence and professionalism of their tax vendors than respondents with small programs.

Value for Money



A significant proportion of respondents (40.8%) believed their tax providers gave them good value for money. 6% believed they received excellent value for money. 41.3% believed they received reasonable value for money whilst 10.4% believed they received poor or very poor value for money.

reasonable value for money but 9% stated it was poor value for money.

A detailed analysis showed that for large programs, half of the respondents believed that the service they received from their Tax providers was either good or excellent value for money, 41% felt that they received

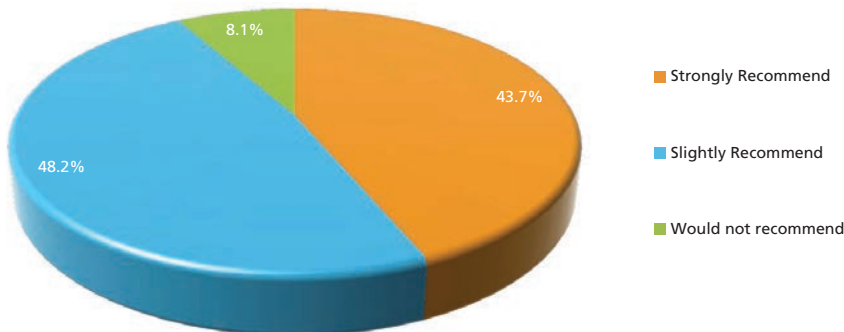
For small programs, a slightly lower proportion of the respondents believed that they received good or excellent value for money from their Tax providers (47%). 41% felt that they received reasonable value (the same as large programs). However 11% felt they received poor value for money and 1% stated it was very poor value for money.



Interesting fact:

Clients with small programs are less likely to feel they are getting good value for money from their tax providers, than large programs.

Recommendation

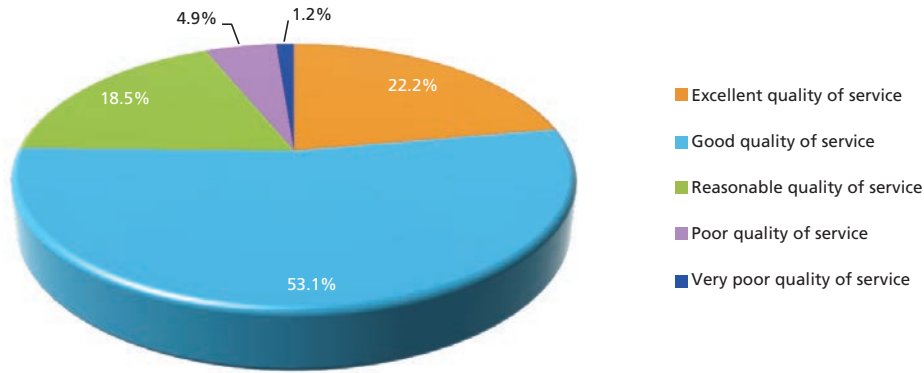


48.2% of the organizations said that they would only slightly recommend their service providers in the field of tax, while 43.7% of them said they would strongly

recommend them and only 8.1% said they would not recommend them to others.

IMMIGRATION

Quality of Service



In regards to service quality, over three quarters of respondents thought their immigration service providers delivered good or excellent service quality. 18.5% felt they received a reasonable quality of service. Only 6.1% of the survey participants thought they received poor or very poor service quality (but this is up 3.7% from last year).

For large programs, 42% of the respondents believed that the service received from their vendors in the area of immigration was good, 29% thought it was

excellent, 17% thought it was reasonable, but 13% thought the service quality was poor.

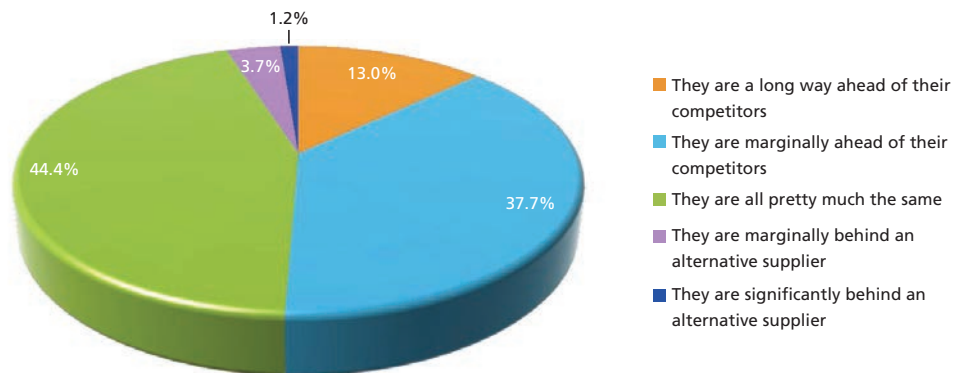
For small programs, 8% of respondents rated the service quality as poor or very poor, 12% thought the service was reasonable and the remainder thought the client service quality was either good or excellent.



Interesting fact:

The respondents most satisfied with their immigration vendors belonged to small programs as they report the highest level of satisfaction.

Technical Competence and Professionalism



Respondents were also asked to rate their immigration vendors in areas of technical competence and professionalism. Overall results show that 44.4% said that all the immigration service providers were pretty much the same, 13% said that their service providers were a long way ahead of their competitors, 37.7% said that they believed their vendors to be marginally ahead of their competitors and 4.9% said they felt their service providers were marginally or significantly behind an alternative supplier.

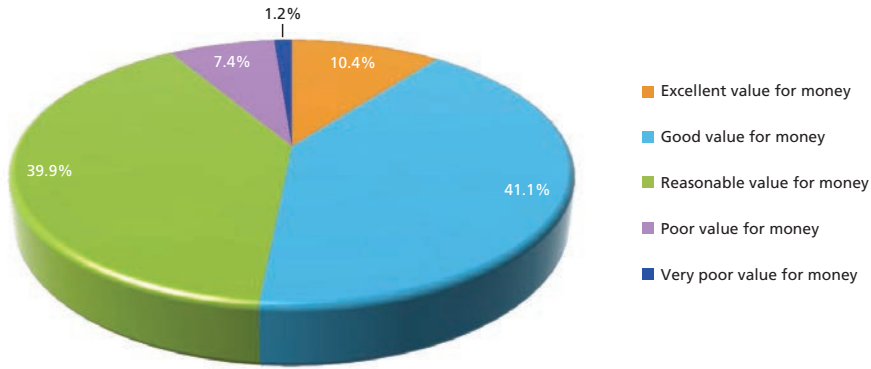
An in-depth analysis shows that for large programs over two thirds (64%) of the respondents felt that their

immigration provider was marginally or significantly ahead of its competitors. 28% stated they were all pretty much the same. Only 8% said their service provider was marginally or significantly behind their competitors.

As for small programs, 45% of the respondents believed their immigration provider was just the same as its competitors. 41% thought that their service provider was marginally ahead of the competitors. 9% felt that their vendor was a long way ahead of the competitors. However, 5% felt their service provider was marginally or significantly behind an alternative supplier.



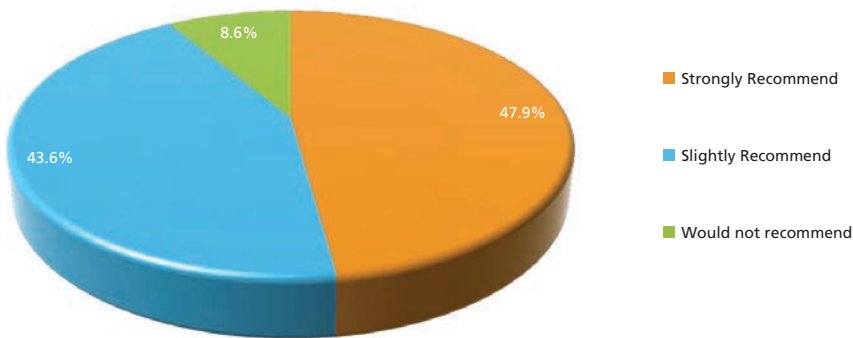
Value for Money



The highest percentage of respondents (41.1%) believed that they received good value for money from their immigration service providers. 39.9% thought the value for money was reasonable. 10.4% thought it was excellent value for money but 8.6% thought they received poor or very poor value for money.

After an in-depth analysis between large and small programs it was noted that a third of respondents with large programs thought they received good value for money whereas 40% of respondents with small programs believed they received good value for money.

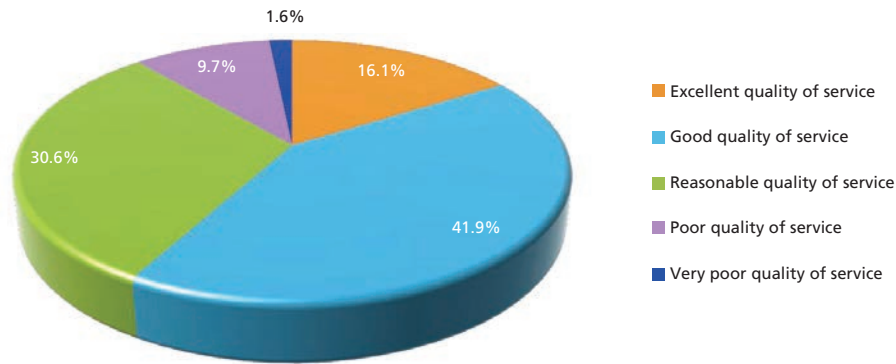
Recommendation



A total of 47.9% of the service providers in the field of immigration were likely to be strongly recommended by the respondents, 43.6% of them are likely to be slightly recommended and only 8.6% of them would not be recommended to others.

ASSIGNMENT AND VENDOR MANAGEMENT

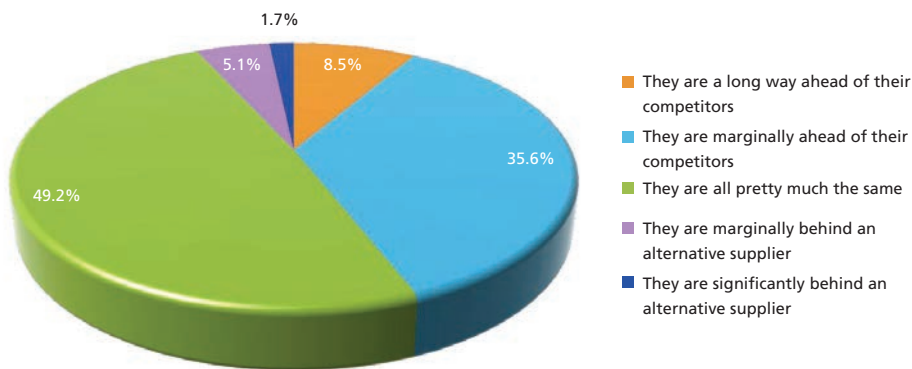
Quality of Service



41.9% believe that they received a good quality of service from their assignment and vendor management service provider. 30.6% thought the service quality was reasonable. 16.1% thought they received an excellent quality of service. 11.3% felt they received either a poor or very poor quality of service.

A similar percentage of large organizations viewed the service they received as excellent or good quality. Although 27% of large organizations felt the quality of service was poor as opposed to 6% of small organizations.

Technical Competence and Professionalism

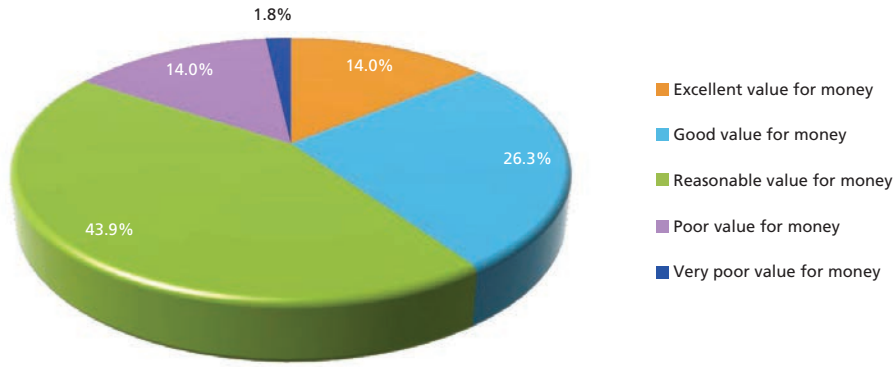


Respondents were also asked to rate their assignment and vendor management service providers in areas of technical competence and professionalism. Overall results show that 35.6% of the respondents felt that their service providers were marginally ahead of their competitors. Whereas almost half said that all the assignment and vendor management service providers were pretty much the same. 8.5% said that their service providers were a long way ahead of their competitors. 5.1% said their service provider was marginally behind an alternative supplier and 1.7% felt their service provider was significantly behind an alternative supplier.

A detailed analysis showed that for small programs over 37% of the respondents thought that their service providers were marginally ahead of their competitors. 7% felt that their vendor was a long way ahead of their competitors. Over half believed they were just the same as their competitors. 3% felt their service provider was marginally behind an alternative supplier.

As for large programs, 30% of respondents stated that they felt their service provider was pretty much the same as the competitors, whereas 60% felt that their service provider was marginally or significantly ahead. Only 10% thought that their service providers were marginally behind their competitors. Therefore it seems as though larger programs feel they are getting a better level of service.

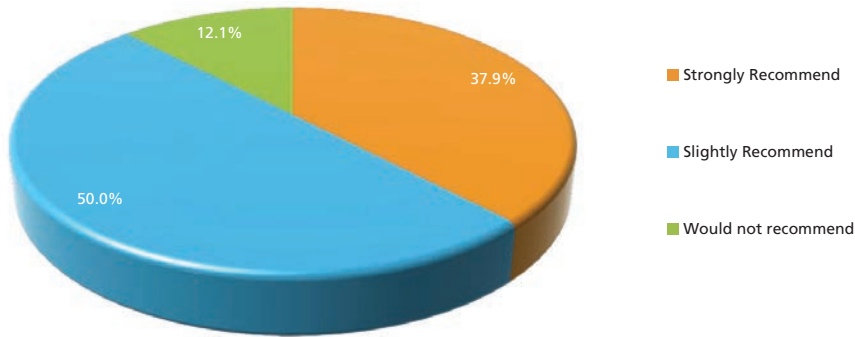
Value for Money



43.9% of respondents believe they receive reasonable value for money from their assignment and vendor management service providers. 26.3% thought the value for money was good. 14% thought they received excellent value for money and 15.8% thought they received poor or very poor value for money (This is up 6% from last year).

After an in-depth analysis between large and small programs it was noted that 50% of respondents with large programs thought they received good or excellent value for money whereas only 38% of respondents with small programs believed they received good or excellent value for money.

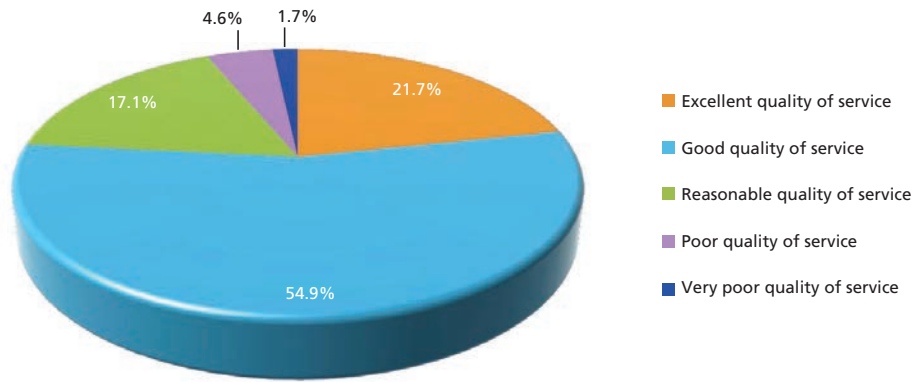
Recommendation



Half of the assignment and vendor management service providers were likely to be slightly recommended by the respondents, 37.9% of them would be strongly recommended and 12.1% of them would not be recommended to others. There is minimal change in these figures in comparison to last year.

RELOCATION/DESTINATION SERVICES

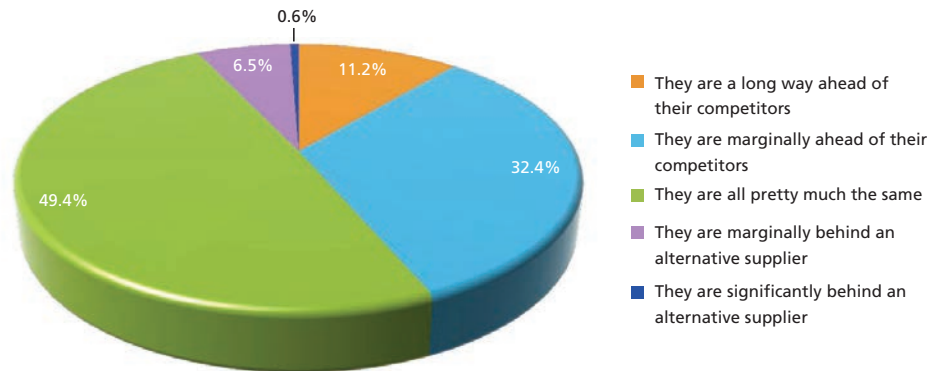
Quality of Service



In terms of service quality, 54.9% of respondents believed their service providers in the area of relocation/destination services provided a good quality of client service, 21.7% thought service quality was excellent and 17.1% thought the service quality was reasonable. Only 6.3% thought the quality of service they received was poor or very poor.

There was no marked contrast between large and small programs when it came to quality of service – the percentage splits between the different levels of service that the respondents felt they received was very similar.

Technical Competence and Professionalism

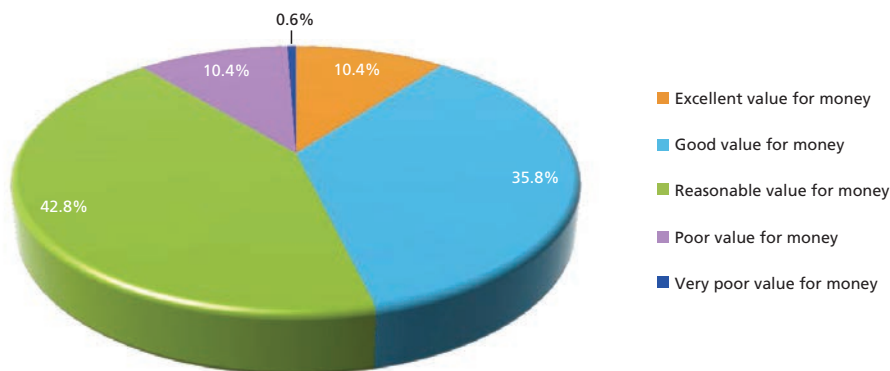


When questioned about the level of competence and professionalism of their service providers, in the area of relocation/destination services, 49.4% of respondents said all the service providers are pretty much the same, 32.4% said their service provider is marginally ahead of its competitors and 11.2% thought they were a long way ahead. 6.5% of the respondents believed their service provider is marginally behind its competitors. A small proportion of respondents (0.6%) said their service provider was significantly behind an alternative supplier.

For large programs, the number of respondents saying that their relocation/destination service providers are only marginally ahead of its competitors was 26%. However, 22% felt their provider was a long way ahead of its competitors.

For small programs, a third of respondents thought that their service provider was marginally ahead of its competitors but only 8% reported their vendors as being a long way ahead of their competitors.

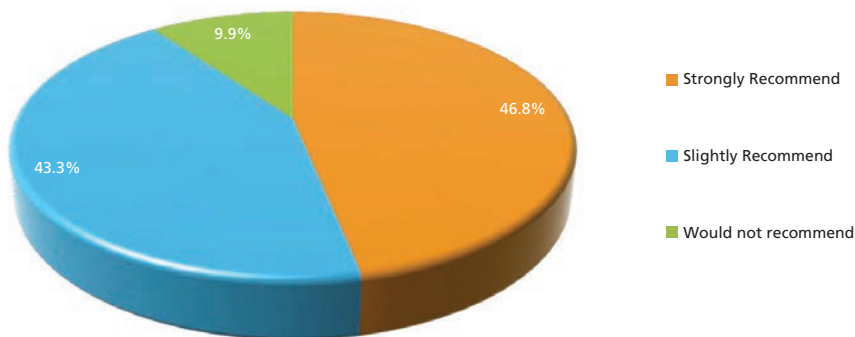
Value for Money



An overall evaluation of the results show that 42.8% of the respondents believed they received reasonable value for money. 35.8% felt they received good value for money and 10.4% though it was excellent.

A detailed analysis shows that for large programs respondents rated their service providers for relocation/destination services quite favorably. Around 54% of the respondents believed that they received good or excellent value for money from their relocation/destination service providers whilst 44% of the respondents with small programs stated they were getting good or excellent value for money.

Recommendation

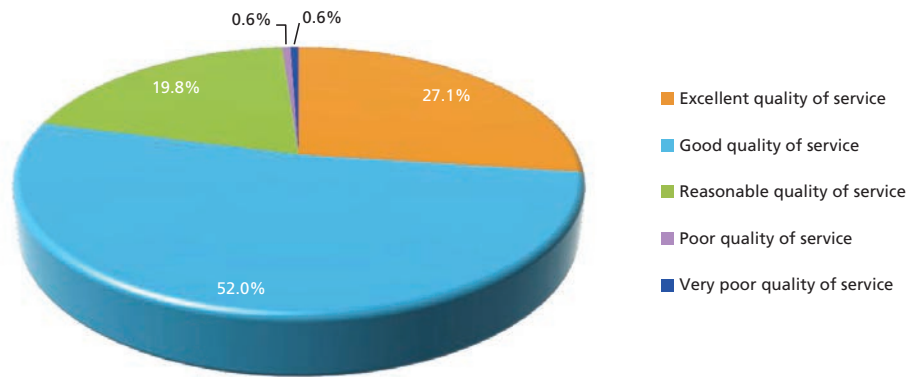


46.8% of the respondents said they would strongly recommend their relocation/destination services provider, 43.3% said they would slightly recommend them and 9.9% said they would not recommend them to others.

It was interesting to note that 60% of large programs would strongly recommend their relocation/destination services provider whereas only 31% of small programs would strongly recommend their relocation/destination services provider.

REMOVALS AND HOUSEHOLD GOODS

Quality of Service

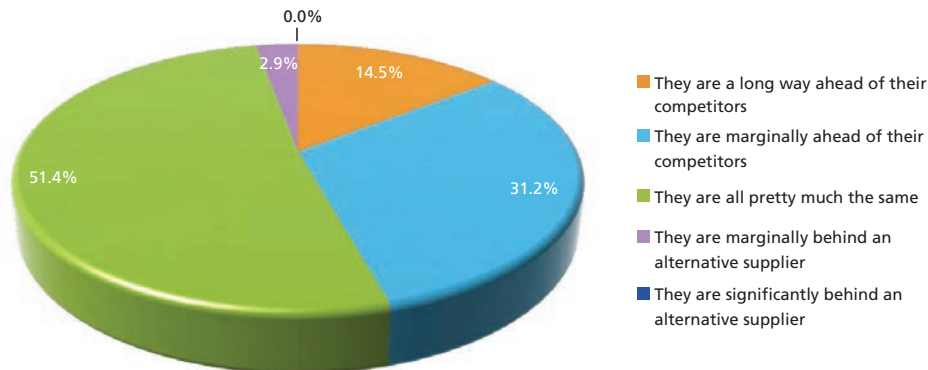


In terms of overall service quality in this field, 52% of respondents felt they received a good quality of service, while 27.1% believe their removals and household goods service provider provided an excellent quality of client service. Only 1.2% believed they received a poor or very poor quality of client service.

For small programs the proportion of respondents who believed they received an excellent quality of service was 23%, 59% felt they received a good quality of service and 16% felt the quality of service was reasonable. Only 1% expressed dissatisfaction at the quality of service.

For large programs, results were quite different with 41% believing they received an excellent quality of client service, over a quarter felt they received a good quality of service and the remainder felt the quality of service was reasonable. No-one with a large program expressed their dissatisfaction at the quality of service.

Technical Competence and Professionalism



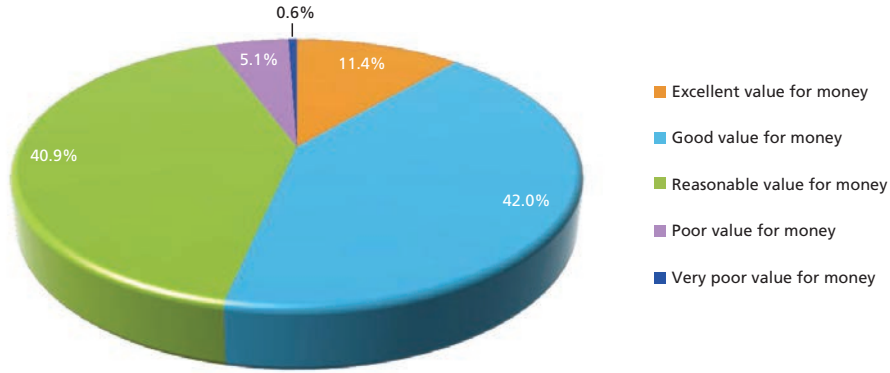
When questioned about the level of competence and professionalism from their service providers, over half of all respondents said all the service providers in this industry are pretty much the same. Only 14.5% expressed the view that their principal service provider is a long way ahead of their competitors. 31.2% felt that their service providers were marginally ahead of their competitors. Only 2.9% claimed that their service provider was marginally behind an alternative supplier.

For small programs 51% of the respondents thought their removals and household goods service providers were all pretty much the same. 38% stated their service provider was marginally ahead of the competitors

and 9% thought their service provider was significantly ahead of an alternative supplier. Only 1% thought their service provider was marginally behind an alternative supplier.

As for large programs, 43% of respondents said that all the service providers in the industry were pretty much the same; a quarter stated their service provider was marginally ahead of the competitors and 29% thought their service provider was significantly ahead of an alternative supplier. Only 4% thought their service provider was marginally behind an alternative supplier.

Value for Money



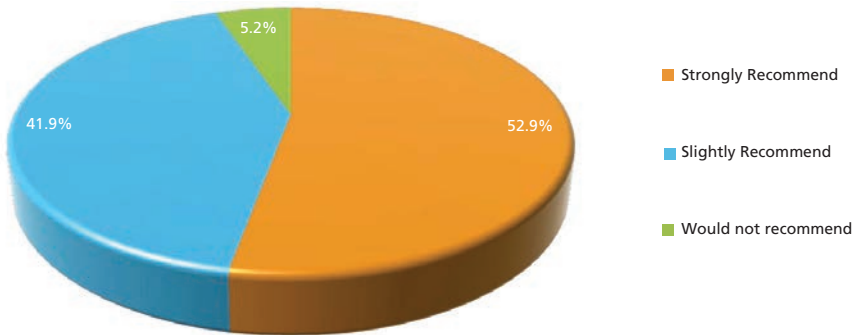
Investigation of the data showed that 42% of respondents believed they received good value for money and 40.9% felt it was reasonable. Only 11.4% believed they received excellent value for money. Less than 6% thought they received poor or very poor value for money.

For small programs 45% of the respondents thought their removals and household goods service provider was reasonable value for money. 42% stated their service provider was good value for money but only 8% thought their service provider was excellent value for money. 5% thought their service provider was poor value for money.

As for large programs, 41% of respondents said that all the service providers in the industry were reasonable value for money; 31% felt that they were good value for money and almost a quarter stated their service provider was excellent value for money. 3% thought their service provider was poor value for money.

This shows that large programs believe they are getting better value for money from their removals and households goods service provider.

Recommendation



For removals and household goods, 52.9% of the respondents said they would strongly recommend their service providers, 41.9% said they would slightly recommend them to others and only 5.2% said they would not recommend them at all.

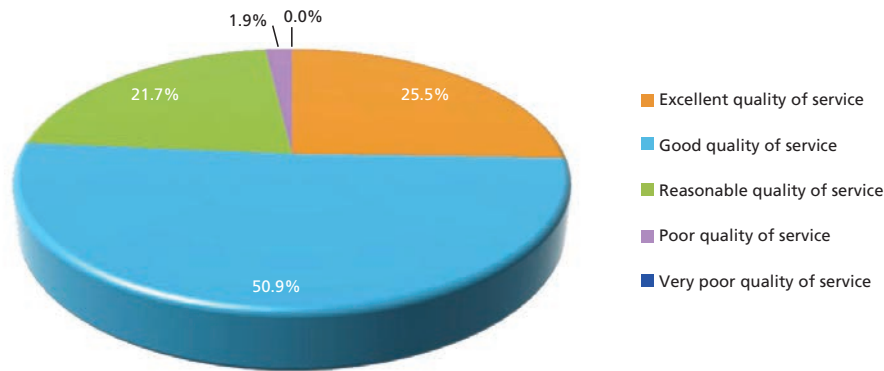


Interesting fact:

Removals and Household Goods is the area where respondents are most likely to strongly recommend their service provider.

COST OF LIVING DATA

Quality of Service



In regards to service quality, over three quarters of respondents thought their cost of living data provider delivered good or excellent service quality. 21.7% felt they received a reasonable quality of service. Only 1.9% of the survey participants thought they received a poor service quality.

For large programs, 52% of the respondents believed that the quality of service received from their cost of

living data provider was good, 20% thought it was excellent and 28% thought it was reasonable.

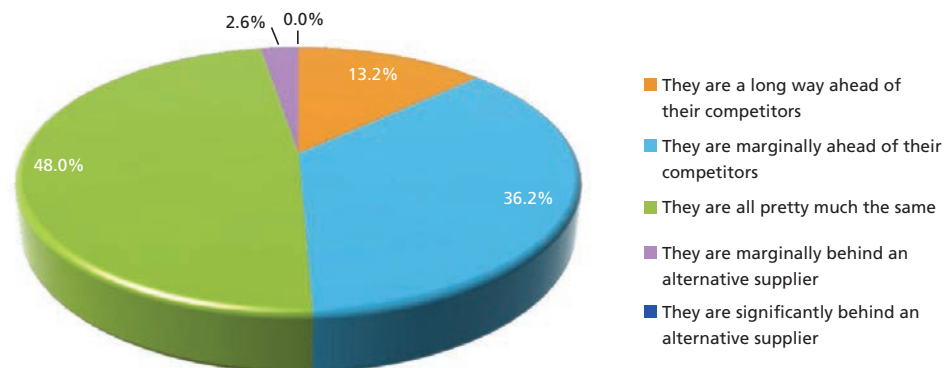
For small programs, 52% of the respondents believed that the quality of service received from their cost of living data provider was good, 29% thought it was excellent and 18% thought it was reasonable. Only 1% thought the cost of living data provider gave a poor quality of service



Interesting fact:

The respondents most satisfied with their Cost of Living data provider belonged to small programs as they report the highest level of top satisfaction.

Technical Competence and Professionalism



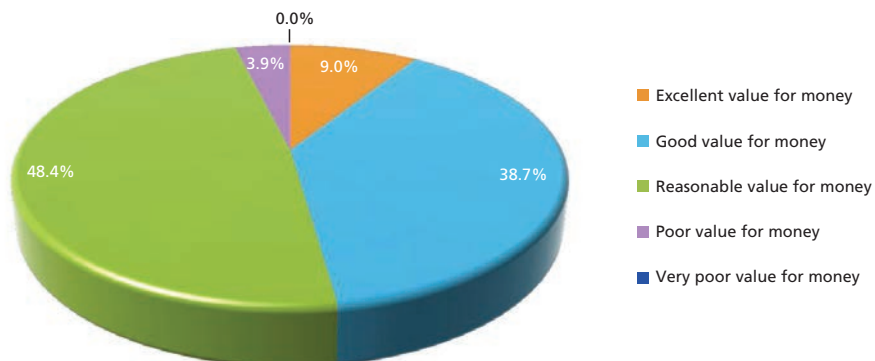
Respondents were also asked to rate their cost of living data provider in terms of technical competence and professionalism. Overall results show that 48% said that all cost of living data providers were pretty much the same, 13.2% said that their data providers were a long way ahead of their competitors, 36.2% said that they believed their data provider to be marginally ahead of their competitors and 2.6% said they felt their data provider was marginally behind an alternative supplier.

An in-depth analysis shows that for large programs 44% of the respondents felt that their cost of living data provider was marginally or significantly ahead of its competitors. Over half stated they were all pretty much the same. Only 4% said their data provider was marginally behind the competitors.

As for small programs, 43% of the respondents believed their cost of living data provider was just the same as the competitors. 54% thought that their data provider was marginally or significantly ahead of the competitors. Only 3% felt their data provider was marginally behind an alternative supplier.



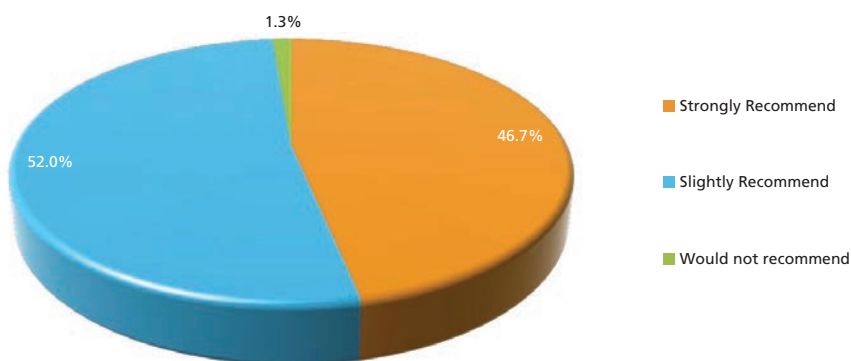
Value for Money



The highest percentage of respondents (48.4%) believed that they received reasonable value for money from their cost of living data provider. 38.7% thought the value for money was good. 9% thought it was excellent value for money but 3.9% thought they received poor value for money.

Further analysis showed there to be little significant difference between how large and small programs viewed the value for money from their data provider.

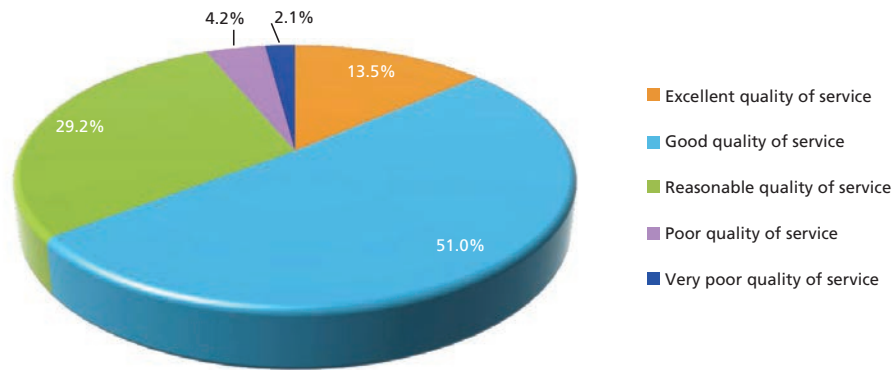
Recommendation



A total of 46.7% of the cost of living data providers were strongly recommended by the respondents, over half of them were slightly recommended and only 1.3% of respondents would not recommend their provider to others.

SERVICED ACCOMMODATION

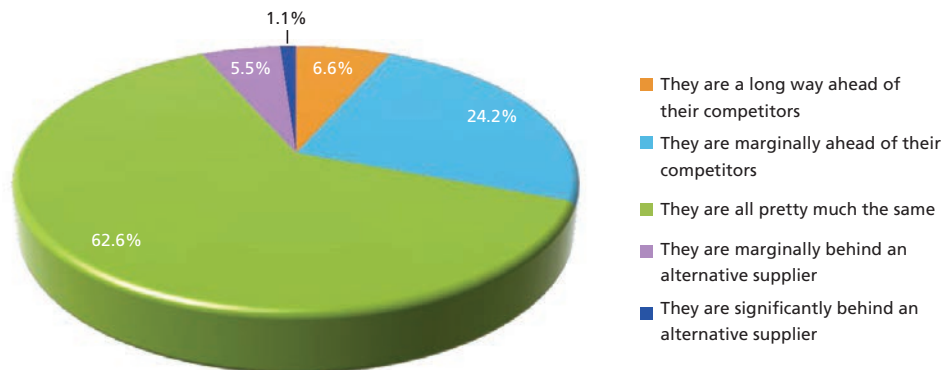
Quality of Service



Results show that serviced accommodation providers are generally perceived as providing excellent or good quality of client service. 29.2% felt they received a reasonable quality of service and 6.3% felt the service quality was poor or very poor.

Similar proportions regarding quality of service provided were found for both small and large programs although none of the large programs stated the quality of service as very poor.

Technical Competence and Professionalism



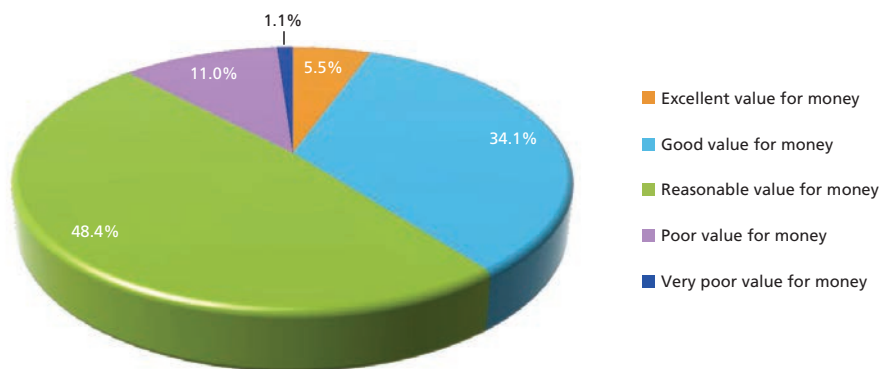
In terms of competence and professionalism, 62.6% thought that their serviced accommodation provider was pretty much the same as its competitors. Almost a quarter thought their service provider was marginally ahead of its competitors. 6.6% thought their service provider provided an excellent level of technical competence and professionalism but 6.6% thought their service provider was marginally or significantly behind an alternative supplier.

For small program 8% claimed that their service providers were a long way ahead of their competitors. A third felt their service provider was marginally ahead of the competitors. 53% thought that they are all pretty much the same. 5% of respondents

thought that their vendors were marginally behind an alternative supplier and 3% of respondents believed that their suppliers were significantly behind an alternative supplier.

Interestingly, some variations were found for those with large programs. 13% of the respondents thought that their suppliers were significantly ahead of their competitors. 13% also thought that their provider was marginally ahead of the competitors. However over two thirds of the responses claimed that the provider they used was pretty much the same but 7% thought that their provider was marginally behind an alternative supplier.

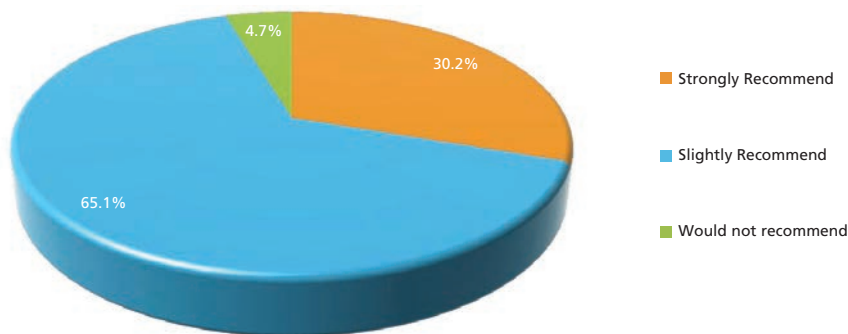
Value for Money



For serviced accommodation, almost half of the respondents believed that they received reasonable value for money. 34.1% thought they received good value for money and 5.5% thought they received excellent value for money. However, 12.1% of respondents were dissatisfied with their Serviced Accommodation provider.

For large programs, 43% of the respondents thought they received good or excellent value for money, half felt it was reasonable and only 7% thought it was poor value for money. Whilst for small programs, 48% of the survey participants thought they received good or excellent value for money and 40% felt it was reasonable value for money. However, 10% rated it as poor value for money and 3% rated it as very poor value for money.

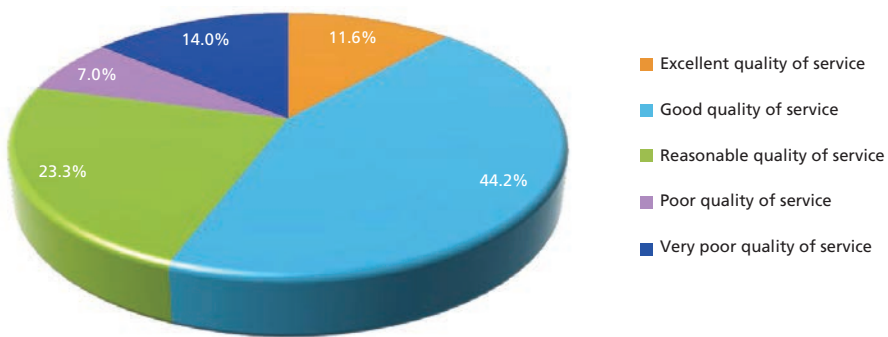
Recommendation



For serviced accommodation, almost two thirds of respondents stated they would only slightly recommend their service providers, 30.2% of them said they would strongly recommend them and only 4.7% said they would not recommend their serviced accommodation provider to others.

PAYROLL

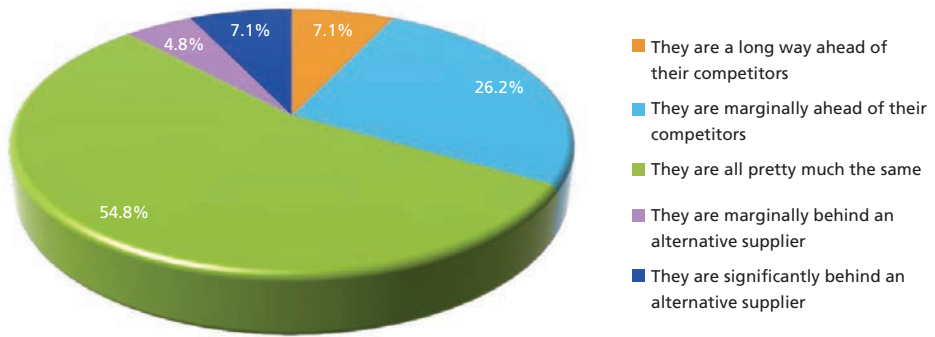
Quality of Service



Results show that payroll service providers are perceived by over half of the respondents as providing excellent or good quality of client service. 23.3% felt they received a reasonable quality of service but 21% felt they received a poor or very poor quality of service. This is the highest level of dissatisfaction across the service providers looked at in this survey.

64% of small programs found the quality of service to be good or excellent, and 16% found it to be reasonable. However 21% found the service quality to be poor or very poor. Whereas organizations with large programs did not feel they received such poor service with 55% stating the quality of service as good or excellent, a third classing it as reasonable and only 11% saying they received a poor quality of service.

Technical Competence and Professionalism



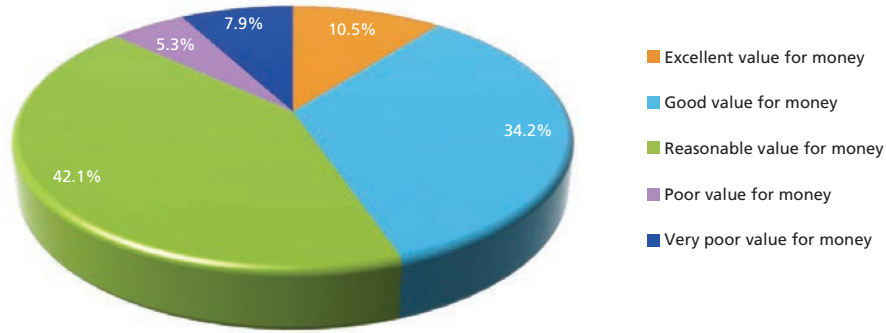
In terms of competence and professionalism, 54.8% thought that their payroll service provider was pretty much the same as its competitors. 26.2% thought their service provider was marginally ahead of its competitors. 7.1% thought their service provider provided an excellent level of technical competence and professionalism but 11.9% thought their service provider was marginally or significantly behind an alternative supplier.

supplier and 5% of respondents believed that their suppliers were significantly behind an alternative supplier. This shows that smaller programs see a wider range in the level of service they receive.

For small programs only 5% claimed that their service providers were a long way ahead of the competitors. 37% felt their service provider was marginally ahead of its competitors. 42% thought that they are all pretty much the same. 11% of respondents thought that their vendors were marginally behind an alternative

supplier and 5% of respondents believed that their suppliers were significantly behind an alternative supplier. Interestingly, for organizations with large programs, none of the respondents thought that their suppliers were marginally or significantly behind and alternative supplier. 56% thought they were all pretty much the same and 44% thought that their provider was either marginally or significantly ahead of their competitors. Once again we can see the larger programs feel that they receive a better level of service.

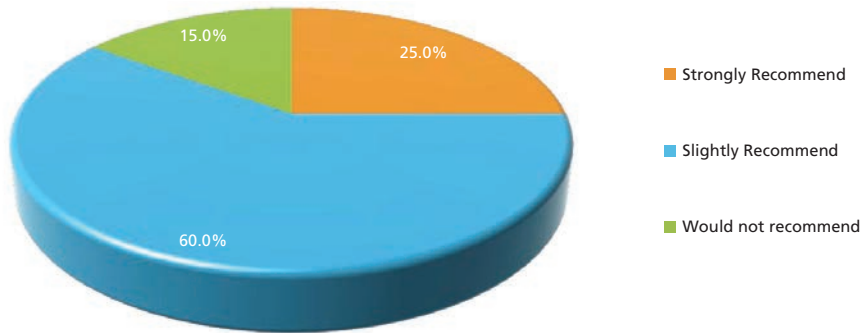
Value for Money



For payroll service providers, 42.1% thought they received reasonable value for money. 34.2% of the respondents believed that they received good value for money and 10.5% thought they received excellent value for money. 13.2% felt they received poor or very poor value for money.

For large programs, half of the respondents thought they received good or excellent value for money and the remainder thought it was reasonable. Whilst for small programs, 41% of the survey participants thought they received good value for money another 12% thought it was excellent, 35% felt it was reasonable and the remaining 12% felt it was poor or very poor.

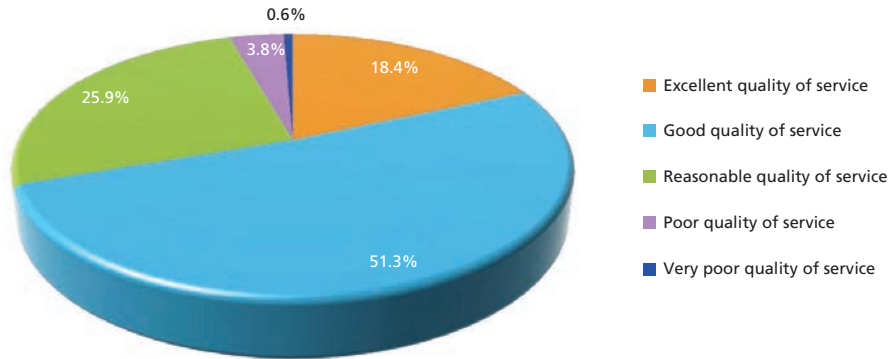
Recommendation



60% of the respondents stated they would only slightly recommend their payroll service providers, a quarter of them said they would strongly recommend them and 15% said they would not recommend their payroll service provider to others.

INTERNATIONAL MEDICAL COVER

Quality of Service



In regards to service quality, over two thirds of respondents thought their international medical cover provider delivered good or excellent service quality. Just over a quarter felt they received a reasonable quality of service. Only 4.4% of the survey participants thought they received a poor or very poor service quality.

38% thought it was good and 14% thought it was excellent. Only 5% rated the service quality as poor.

For large programs, 43% of the respondents believed that the quality of service received from their international medical cover provider was reasonable,

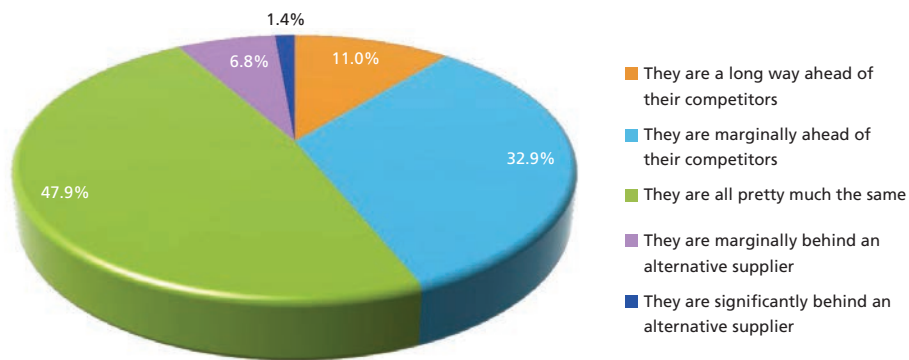
For small programs, 55% of the respondents believed that the quality of service received from their international medical cover provider was good, 19% thought it was excellent and 18% thought it was reasonable. 7% thought the quality of service was poor and 1% stated that it was very poor.



Interesting fact:

The respondents most satisfied with their international medical cover provider belonged to small programs as they report the highest level of top satisfaction.

Technical Competence and Professionalism



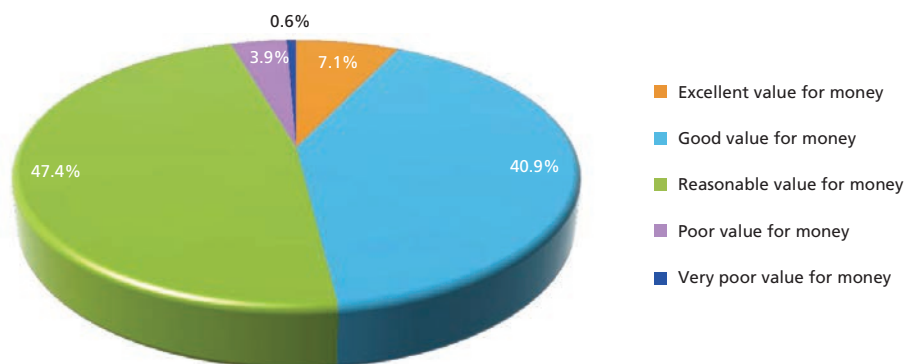
Respondents were also asked to rate their international medical cover provider in terms of technical competence and professionalism. Overall results show that almost 48% said that all international medical cover providers are pretty much the same, 32.9% said that their provider was marginally ahead of the competitors, 11% said that they believed their data provider to be a long way ahead of the competitors and 8.2% said they felt their international medical cover provider was marginally or significantly behind an alternative supplier.

An in-depth analysis shows that for large programs 37% of the respondents felt that their international medical cover provider was marginally or significantly ahead of its competitors. Over half stated they were all pretty much the same. 10% said their data provider was marginally or significantly behind the competitors.

As for small programs, 43% of the respondents believed their international medical cover provider was just the same as the competitors. 45% thought that their provider was marginally or significantly ahead of the competitors. 13% felt their data provider was marginally or significantly behind the competitors.



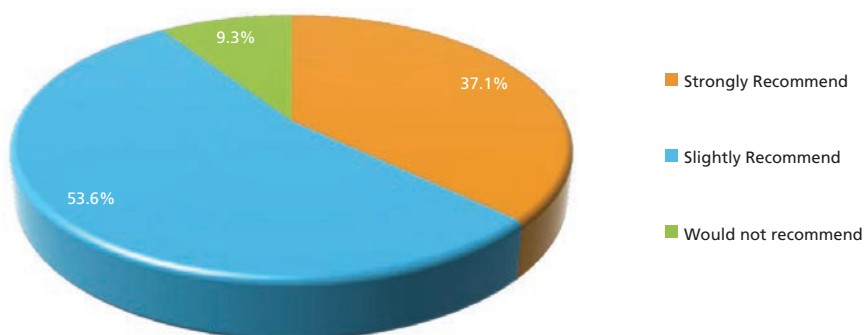
Value for Money



The highest percentage of respondents (47.4%) believed that they received reasonable value for money from their international medical cover provider. 40.9% thought the value for money was good. 7.1% thought it was excellent value for money but 4.5% thought they received poor or very poor value for money.

Further analysis showed that on the whole smaller programs felt they received better value for money from their international medical cover provider.

Recommendation

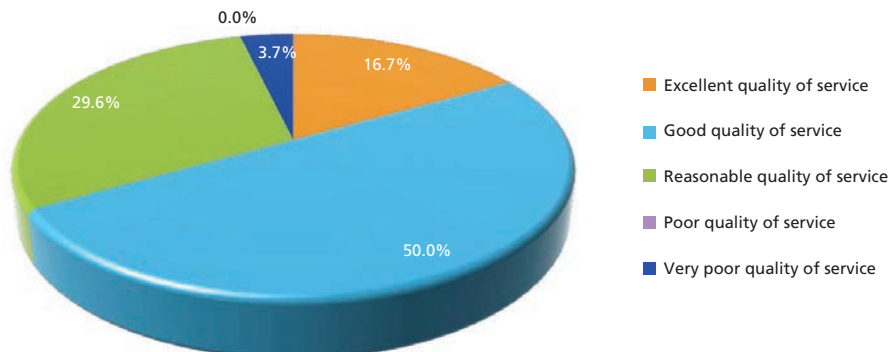


A total of 37.1% of international medical cover providers were strongly recommended by the respondents, over half of them were slightly recommended and only 9.3% of respondents would not recommend their provider to others.

Given the results for quality of service, technical competence and value for money, it is perhaps unsurprising that the small programs were more likely to recommend their provider than large programs.

EXPENSE MANAGEMENT

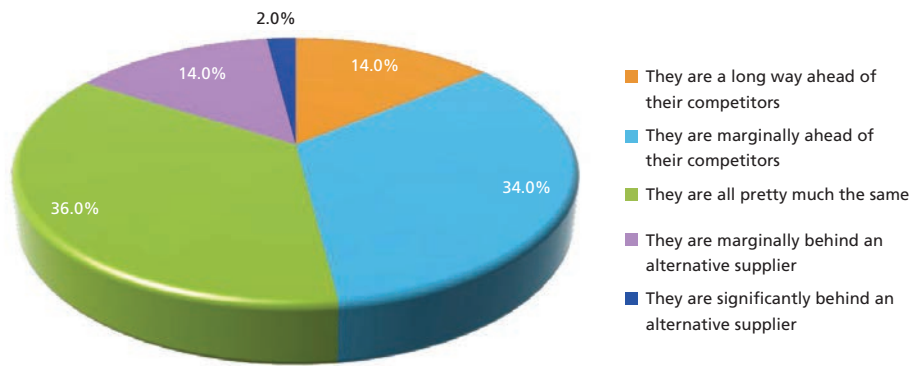
Quality of Service



Results show that expense management service providers are perceived by half the respondents as providing a good quality of client service. 16.7% of respondents felt their provider gave an excellent quality of service. 29.6% felt they received a reasonable quality of service and only 3.7% felt they received a very poor quality of client service.

Two thirds of small programs found the quality of service to be good or excellent, and a third found it to be reasonable. Whereas organizations with large programs had a wider range of experience. 60% felt the quality of service was good or excellent, 30% thought it was reasonable but 10% found the quality of service to be very poor.

Technical Competence and Professionalism



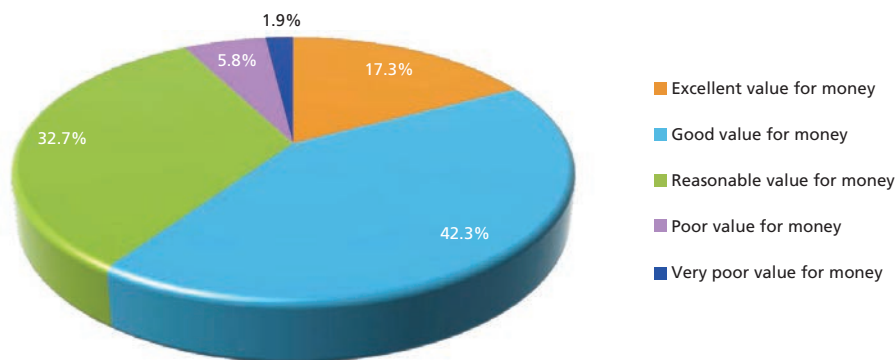
In terms of competence and professionalism, 36% thought that their expense management provider was pretty much the same as the competitors. 34% thought their service provider was marginally ahead of its competitors. 14% thought their service provider was a long way ahead of its competitors but 16% thought their service provider was marginally or significantly behind an alternative supplier.

much the same. 5% of respondents thought that their vendors were marginally behind an alternative supplier

For small programs only 5% claimed that their service providers were a long way ahead of their competitors. 42% felt their service provider was marginally ahead of its competitors. 47% thought that they were all pretty

Interestingly, for organizations with large programs, 22% of the respondents thought that their suppliers were streets ahead of their competitors. 11% felt their provider was marginally ahead of the competitors and 44% felt they were pretty much the same as their competitors. 22% of respondents thought that their vendors were marginally or significantly behind an alternative supplier. This shows that large programs see a wider range in the level of service they receive.

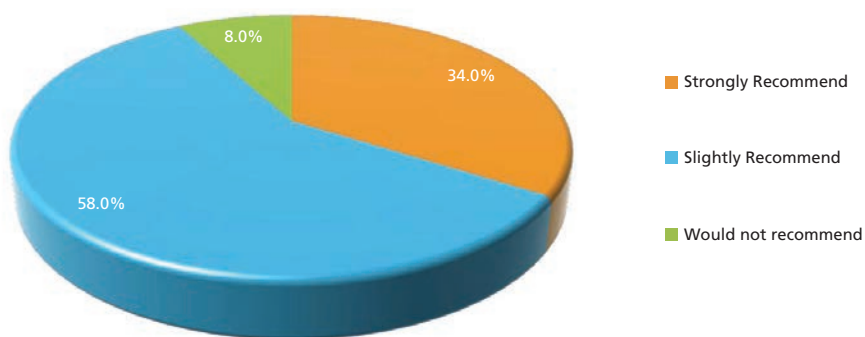
Value for Money



For expense management service providers, 42.3% of the respondents believed that they received good value for money. Just under a third thought they received reasonable value for money and 17.5% thought they received excellent value for money. 7.7% felt they received poor or very poor value for money.

For large programs, 55% of the respondents thought they received good or excellent value for money, a third felt they received reasonable value for money and the remainder described it as very poor value for money. Whilst for small programs, almost two thirds of the survey participants thought they received good or excellent value for money, 30% felt it was reasonable and only 5% felt it was poor.

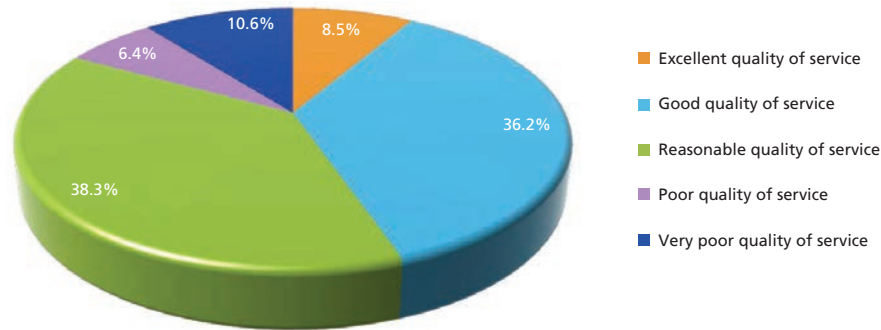
Recommendation



58% of the respondents stated they would only slightly recommend their expense management service provider, 34% of them said they would strongly recommend them and only 8% said they would not recommend their expense management service provider to others.

TECHNOLOGY

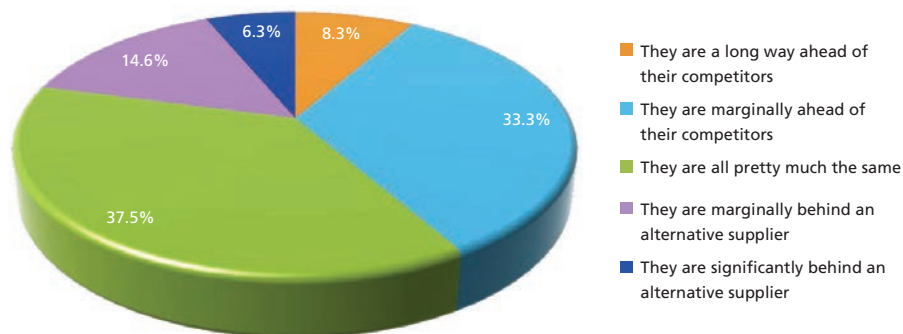
Quality of Service



Results show that technology service providers are perceived by over a third of the respondents as providing a good quality of client service. 8.5% feel it is excellent and another 38.3% feel they receive a reasonable quality of service but 17% feel they receive a poor or very poor quality of service.

43% of small programs found the quality of service to be good, and 36% found it to be reasonable. However, 21% of the respondents with small programs found the service quality to be poor or very poor. Whereas 50% of organizations with large programs felt they received a good or excellent quality of service. A third classed the quality of service as reasonable and 17% stated the quality of service was very poor.

Technical Competence and Professionalism



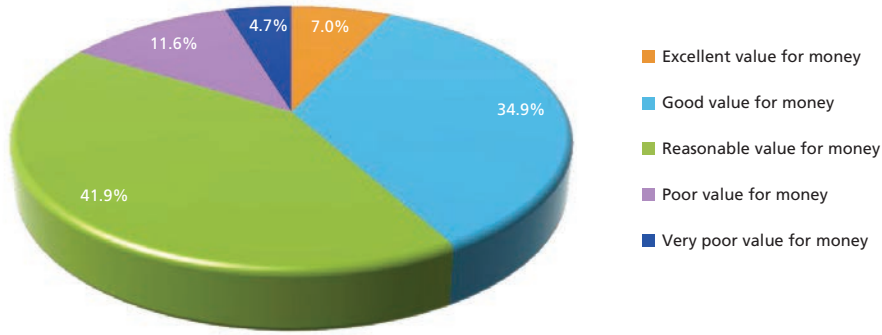
In terms of competence and professionalism, a third thought their service provider was marginally ahead of its competitors. The highest percentage (37.5%) thought that their technology service provider was pretty much the same as its competitors. 8.3% thought their service provider was a long way ahead of their competitors. However, 20.9% thought their service provider was marginally or significantly behind an alternative supplier.

For small programs 47% claimed that their service provider was marginally ahead of its competitors. A third thought that they are all pretty much the same. Only 7% said their technology service provider was a long way ahead

of an alternative supplier. 13% thought that their service provider was marginally behind an alternative supplier.

Interestingly, for organizations with large programs, a third of respondents thought that their provider was marginally or significantly ahead of their competitors. 42% considered that their provider was pretty much the same as the rest of the market. However, a quarter of the respondents felt their vendors were marginally or significantly behind an alternative supplier. This shows that this year large programs are seeing a wider range in the level of service they receive.

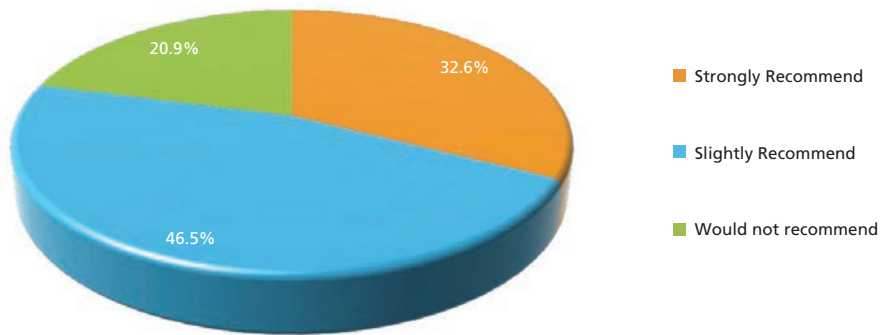
Value for Money



For technology providers, 41.9% of the respondents believed that they received reasonable value for money. Just over a third thought they received good value for money and 7% thought they received excellent value for money. 16.3% felt they received poor or very poor value for money.

For large programs, there was a fairly even split across the ratings. However for small programs, over half of the survey participants thought they received good value for money, 38% felt it was reasonable and the remainder felt it was poor.

Recommendation



Almost a third of the respondents stated they would strongly recommend their technology service providers, 46.5% of them said they would only slightly recommend them and 20.9% said they would not recommend their technology service provider to others. This is the lowest level of recommendation across all the service providers.

8. Conclusion

The report brings together key information in critical areas of outsourcing, vendor management, structure of Global Mobility teams, market shares and vendor costs. The report aims at presenting the essence of the information shared by the FEM members. This report holds useful information that can be used as a tool when reviewing a Global Mobility team internally and working towards best practice.

The FEM is grateful to all those who participated in the survey. Each response has contributed in a huge way in making the study a success.

The Forum for Expatriate Management

September 2013



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| Dallas | San Francisco |
| Geneva | São Paulo |
| Houston | Singapore |
| London | Sydney |
| McLean, Va. | Washington D.C. |

Non-U.S. offices are operated by affiliated entities. See website for details.

Appendix A

List of Survey Participants

| | | |
|-----------------------------------|-----------------------------------|---------------------------------------|
| AB InBev | Britvic Soft Drinks | Edwards Ltd |
| AB Sugar | Bunge Limited | EHC Global, Inc |
| ADP | CA Technologies | Emerson Process Management |
| AECOM | CAE Inc. | Eni International Resources |
| Agrium | Campbell Soup Company | Enscopl |
| AIA International Limited | Capitaland China | Equifax Inc |
| AIG | CareFusion | Ericsson Australia Pty Ltd |
| Air Canada | Carrefour | Ernst & Young LLP |
| Air New Zealand | Cater Care Group Pty Ltd | Fidelity Investments |
| Aker Powergas Pvt. Limited | Catlin Singapore Pte Ltd | Fidessa |
| Albemarle Corporation | CB&I | FM Global |
| Alcatel-Lucent | Cerner Corporation | Foot Locker, Inc. |
| Allegis Group, Inc. | CfBT Education Trust | Four Seasons Hotels and Resorts |
| Allianz SE | CGG Services (UK) Ltd | Freed Maxick CPAs |
| Allscripts | CIAN CEC | Fujitsu Technology Solutions |
| Amazon | Cielo | GDF SUEZ |
| Amcor Flexibles Europe & Americas | Citi | General Electric |
| AMEC Global Resources | Cloudybay Sustainable Forest | General Mills, Inc. |
| American Licorice Co | CNH (FIAT) Industrial | General Motors Company |
| ANZ | Coats plc | Gerresheimer AG |
| APR Energy | Colgate-Palmolive | Goodyear |
| AREVA | Colt Technology Services | Grant Thornton LLP |
| Armajaro Trading Ltd | Commonwealth Bank | Halliburton |
| Ashurst International Law Firm | Cooper Standard Automotive | Hapag-Lloyd AG |
| Aspen | Corporate Relocations Greece | Hastings Deering (Australia) Ltd |
| Associated British Foods | Covance | HCR |
| Atkins | Crédit Agricole SA | Herbalife International |
| Aurecon | Credit Suisse | High Street Partners |
| Avery Dennison | Cristo Rey | Hilton Worldwide |
| AZ Electronic Materials | Croda International Plc | Honeywell |
| Babcock Pty Ltd | Daiichi Sankyo Pharma Development | Hospira Inc |
| BAE Systems Inc | Daniel Swarovski AG | HSBC |
| Baker Hughes International | DCNS | Hunt |
| Balfour Beatty | Dell | Husqvarna AB |
| Barrows | Deloitte | IHG |
| Barry Callebaut AG | DENSO | IHS Inc. |
| BAT | DFS Group | IKEA Group |
| Bauervietnam | Diageo Plc | Incitec Pivot Limited |
| Bayer MaterialScience Ltd. | Discovery Communications | ING Bank |
| BG Group | DLA Piper | Ingersoll Rand |
| BGRS | DSM | International Rice Research Institute |
| Biogen Idec | DST Systems, Inc. | Intrum Justitia |
| BNP Paribas Leasing Solutions | dunnhumby Ltd | Invesco |
| BNP Paribas SA | Dyson Ltd | J.Crew |
| Boehringer Ingelheim | EADS | Jacobs Netherlands BV |
| Booking.com | East West Wind Consulting | JDSU |
| Bridgestone Europe n.v. | ED&F Man Holdings Ltd | Johnson & Johnson |

| | | |
|-------------------------------|--------------------------------------|-------------------------------|
| Johnson Controls Ltd | Owens-Illinois, Inc. | Team Relocations |
| KBR | Oxfam GB | TESSENDEERLO CHEMIE NV |
| Kellogg Company | Pan Pacific Hotels Group | The Boeing Company |
| Kelly Services Inc. | PanAust Limited | The Bose Corporation |
| Kohler Co. | PAREXEL International | The Coca-Cola Company |
| Körber AG | Peabody Energy | The Sage Group plc |
| KPMG | PGS | ThoughtWorks, Inc. |
| Land O'Lakes, Inc. | PricewaterhouseCoopers | Tiffany & Co. |
| Lavery | Proctor Gamble | TNS |
| Leggett & Platt, Incorporated | PROS, Inc. | Toyota |
| Liberty Mutual Insurance | PTC | Treasury Wine Estates Limited |
| Limited Brands | QBE Insurance Group Ltd | TRW Automotive |
| Lisa Dräxlmaier GmbH | QinetiQ Ltd | TÜV SÜD AG |
| Lockheed Martin Corporation | Quintiles East Asia | Tyco International |
| Logitech | Ralph Lauren Corporation | Ubee Interactive |
| Lutheran World Relief | Raytheon Company | Unilever |
| Maersk | RBS | Unipart Group Limited |
| Mars Inc | REA | United Nations |
| Maxion Wheels | RFS GmbH | UnitedHealth Group |
| MAYER BROWN INTERNATIONAL | Roche | UPS |
| LLP | Rochvatanaboon | UTC |
| McGraw Hill | Royal Caribbean Cruises, Ltd. | VimpelCom |
| Merck KGaA | RSA | Visa Inc |
| METRO AG | RWE Dea AG | Visteon Corporation |
| MGM Resorts International | Sabre-Holdings | Volvo Car Group |
| Michelin | SanDisk Corporation | WD a Western Digital Company |
| Micron Technology, Inc. | Save the Children International | WG Mustang |
| MicroVention, Inc | Schaeffler Holding (China) Co., Ltd. | Willis |
| Monash University | Selex ES | Wipro Technologies |
| MWH | Semperit AG | Wood Group Mustang |
| N M Rothschild & Sons Limited | Serco Group | World Vision International |
| Natixis | SES | WorleyParsons |
| NATS | Shire Pharmaceuticals | Xella Baustoffe GmbH |
| Nestlé | Siemens PLC | |
| New York University Abu Dhabi | SimCorp | |
| Newmont Mining Corporation | Singapore Telecommunications Ltd | |
| Nokia Inc. | SITA Inc Ireland Ltd | |
| Nomura International Plc | SKM | |
| Nooter Eriksen | Standard Bank | |
| Northern Trust | State Street | |
| Northrop Grumman Corporation | Summit Mining International Inc | |
| Novartis Pharma AG | SunGard Data Systems Inc. | |
| Novo Nordisk Zurich | Switchplace | |
| NUETERRA | Syngenta Crop Protection AG | |
| NXP Semiconductors | T. Rowe Price Associates | |
| NYU | Target | |
| OpenText | TASC, Inc. | |

Appendix B

List of Service Providers

| | | |
|--------------------------------|--------------------------------|-------------------------------------|
| Accenture | CORT Destination Services | HTH |
| ACE | Cox | Human Entrance |
| Activpayroll | Crown World Mobility | IBM |
| Adelaide Financial Inc | CWS | ICC |
| ADP | Daman Health Insurance | ICUNet |
| Aetna International | Daryl Flood | Interdean/Santa Fe Group |
| AGS Worldwide Movers | Deloitte | Intermovers |
| Aia Health Insurance | Deutscher Ring | International Relocation Management |
| AIG | DhPG with Nexia | International SOS |
| AIReS | DKV Globality | IOR Global Services |
| AIRINC | ECA | IPR |
| Airways | Elite Executive Services | ISS Movers |
| Alexander's | Emigra Ogletree Worldwide | J. Allis & Co |
| Allianz | Epstein, Becker & Green | James Cowper |
| Allied Pickfords | Equiniti | K2 Corporate Mobility |
| Altair Global Relocation | Equus Software | Kent International Movers |
| Amber Lodging | EY | KPMG |
| AMS | Eurocost | Lexicon Relocation |
| AON | Evans Wallace | Lombard |
| Armstrong International Movers | Excel International | Marsh |
| Arpin | Executive Quarters | Mercer |
| Asian Tigers Mobility | Ez-Entry | Micropay |
| Aspire Mobility | FESCO | Mobel Transport |
| Atlantic NOS Relocations | Fisher & Phillips LLP | Mobility Services International |
| Aviva | FosterQuan | Morgan Lewis |
| AWC | Fragomen | MSH International |
| AXA PPP | Frasers Hospitality | Myers Thompson |
| Baker and McKenzie | Freed Maxick | NEI Global Relocation Services |
| Baker Tilly | Fry Wagner | Nelson Westerberg |
| BAL | Garfinkel Immigration Law Firm | New World Van Lines |
| BDO | GB Liners | Nippon Express |
| Blank Rome | GeoBlue | Nippon Life Insurance |
| Boxx | Ginter | North American Van Lines |
| BridgeStreet | Global Adjustments | NorthgateArinso |
| Bristol Global | GMC Services International | Nucompass Mobility |
| Brookfield GRS | GOUDA | Oakwood Worldwide |
| BUPA International | Grace | OSS Movers |
| CapRelo | Graebel Relocation | Paramount Transportation Systems |
| Cartus | Grant Thornton | Pasona |
| Celergo | Green & Spiegel | Paylocity |
| Champion International | Grospron | Pearl Law Group |
| Chartis | Global Tax Network | Pickfords |
| CIGNA Global Health Benefits | GUC | Plus Relocation |
| CILEO, INSITU | Harrow Green | Polaris Global Mobility |
| Clark & Reid | Hessel | Prestige |
| Concur | High Street Partners | Previnter |
| Continuum International | HR Toolbox | |

| | |
|------------------------------------|----------------------------------|
| Pro-Link GLOBAL | Worldwide Relocation Specialists |
| Pryor Cashman | Wridgways |
| PricewaterhouseCoopers | Xchanging HR Services |
| Quest | XN Global |
| Regus | |
| Relocation Center | |
| Relocation Resources | |
| Relo Japan | |
| Robinsons Relocation | |
| RSI | |
| Rudnick Spector | |
| Runzheimer | |
| S&M Moving | |
| Schweizer Relocation | |
| Seegmuller | |
| Select Apartments | |
| Seyfarth Shaw | |
| Silverdoor | |
| Siracusa | |
| SIRVA | |
| Southern Cross | |
| SSQ | |
| Sterling | |
| Suddath | |
| Suite America | |
| Sun Life (Canada) | |
| Syner Expat | |
| Tata AIG | |
| Team Allied | |
| Team Relocation | |
| The Apartment Service Company | |
| The Relocation Center | |
| TheMIGroup | |
| TNT | |
| Towers Watson | |
| TransferEase Relocation Inc | |
| TTA | |
| Unigroup Relocation | |
| Uniqa | |
| UnitedHealthcare Global Solutions | |
| United Van Lines | |
| Van Breda International | |
| Verspieren | |
| Wayne Moving & Storage | |
| Weichert Relocation Resources Inc. | |
| Welcare | |
| Welcome Home | |

Appendix C

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intlauto.com and readydrive.com

International AutoSource assists Expats with car financing and leasing in the United States and Canada. For decades, International AutoSource has been providing Expats with programs to solve personal transportation needs for both long term and short term assignments. These unique programs provide purchasing, financing and leasing solutions for Expats moving to the United States and Canada without a U.S. or Canadian credit history. Expats can choose from any make and model, both new and used. In addition, low cost auto insurance is also available without a U.S. or Canadian driving history. Through these programs, Expats access International AutoSource's personal concierge service and exclusive guarantees not found anywhere else.

For shorter term assignments, International AutoSource's ReadyDrive program is a low cost rental car solution for 30 days or more. This unique program provides savings up to 50% versus the best corporate rates available. ReadyDrive is available in 13 countries and offers rentals at the same base country rate all year round. Insurance is always included along with the added benefit of spouse and employee sharing.

For more information about the AutoSource and ReadyDrive programs contact International AutoSource, a trusted source serving the expat community for over 50 years.



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**To contact Fragomen in 39 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 toward 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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Europe, Middle East, Africa: emea@unigrouprelocation.com

Asia Pacific: apac@unigrouprelocation.com

With regional headquarters in St. Louis, Mo., Amsterdam, and Hong Kong, UniGroup Relocation is a global mobility network providing a broad range of relocation solutions with nearly 1,200 service centers in more than 180 countries across six continents. Built on the heritage of the largest and most recognized U.S. household goods movers, United Van Lines and Mayflower Transit, and the highly regarded presence of UTS International in the rest of the world, UniGroup Relocation has more than eight decades of experience meeting customers' relocation needs.

The company recently expanded its offerings to include pre-assignment, housing and destination services to better meet the broad range of mobility needs of HR professionals and their assignees. These services include everything from new location orientations, home finding, and culture and language instruction, all arranged through a single point of contact. Additionally, through standard service level agreements across its network, UniGroup Relocation is committed to providing consistent quality in every corner of the world,

For more information on our wide array of relocation services visit us online at unigrouprelocation.com.

Appendix D

About Us



The Forum for Expatriate Management was founded in October 2008 by Brian Friedman.

Formerly the Chief Executive Officer of both Ernst & Young's and previously Arthur Andersen's Human Capital practice, Brian has worked in Global Mobility and Expatriate Management for over 25 years.

The Forum for Expatriate Management is both a virtual and real-time community of global mobility professionals from many of the world's leading companies. Our membership profile includes senior HR professionals, global operations

directors and executive leaders who have to manage the issues of international assignees on a daily basis plus selected service providers who bring expert advice, support and services to facilitate effective cross border employment and living.

Our members use the FEM website (www.totallyexpat.com) as an information and news portal as well as to network with their fellow professionals worldwide.

AUTO SOURCE

ReadyDRIVE



Expat Car Financing, Leasing And Long-Term Rental Car Programs

The AutoSource Programs Feature:

- Available in the United States and Canada
- Car financing and leasing without a U.S. or Canadian credit history
- New and used vehicles
- All makes and models
- Personal concierge service
- Low cost auto insurance without a U.S. or Canadian driving history
- Finance assistance on vehicles purchased elsewhere
- Exclusive AutoSource Guarantees
 - Lowest Price Guarantee
 - Satisfaction Guarantee
 - Delivery Date Guarantee(AutoSource Preferred Program only)

ReadyDrive is a low cost rental car solution for 30 days or more

- Available in 13 countries
- Save up to 50% versus the best corporate rates
- Same base country rate regardless of location and season
- Spouse and employee sharing is included at no additional cost
- All rates include comprehensive insurance

Contact International **AutoSource**

A trusted partner serving the expatriate community for over 50 years

www.intlauto.com • intlauto@intlauto.com • 516-496-1816 (USA)

www.readydrive.com • readydrive@readydrive.com





Opportunity is everywhere. So are we.

UniGroup Relocation is a global mobility network with nearly 1,200 locations serving more than 180 countries across 6 continents. Our broad range of pre-assignment, moving and destination services will guide HR professionals and their assignees along every step of the journey, from beginning to end. Experience the difference of a common voice, a consistent standard of quality and unsurpassed local knowledge. Contact the regional office nearest you.

Americas: americas@unigrouprelocation.com

EMEA: emea@unigrouprelocation.com

Asia/Pacific: apac@unigrouprelocation.com

UniGroupRelocation.com/FEM

