



Managing the Global Mobility Function 2012

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



This research has been generously sponsored by NatWest Global Employee Banking



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Foreword

NatWest Global Employee Banking is delighted to be involved with the Managing Global Mobility Function Survey. The Survey helps all of us within the industry to better understand the exciting and diverse sector we operate in.

We have been working in the Global Mobility industry with relocation agents and corporate customers for nearly 20 years assisting those relocating employees to open bank accounts.

The Survey provides us with the opportunity to take a step back and understand the trends in the industry and helps us all to focus on our business and plan ahead to best meet the needs of our clients and their customers within the international assignee community.

From our own experience, the concerns of relocating employees frequently include securing a visa and work permit, finding the right home, establishing the children in good schools and mastering a new language. This is where many in-pats to the UK may overlook what should in fact be one of their most important and earliest priorities. Having a working bank account will allow all the other arrangements to happen more smoothly and will support assignees and help global mobility teams in delivering effective Global Mobility management.

The Managing the Global Mobility Function Survey is an essential read for all Global Mobility professionals. We are confident that you will find the research as insightful as we have.

Neil Barsby

Head of NatWest Global Employee Banking



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1. Introduction



With little change in the global economic climate, organizations are looking internally to transfer talent to new developing regions to grow their business. At the heart of this growth initiative is the Global Mobility Function. Readiness

and strategic alignment to business is essential to meet the challenges of the new emerging markets.

Establishing and maintaining a successful Global Mobility program is a challenge in itself but also moving into new locations, only increases the pressures.

Thus, organizations are in a perpetual quest to discover the most efficient and lucrative ways of managing their global workforce.

At the FEM, our efforts are directed towards giving our members the best possible alternatives and solutions for the Global Mobility challenges they are faced with. We are delighted to present the results of our 3rd 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

The additional areas explored this year include types of assignment, number of assignment initiations, the average costs involved with certain services (Tax returns, visas, shipping etc).

We hope you find the survey a useful tool in benchmarking your own function and realize the importance of a Global Mobility function in an ever increasing global economy.

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 now 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 a benchmark against a comparator group of your choice.

If this is of interest, please contact me at brian.friedman@centaur.co.uk

Brian Friedman

Founder - The Forum for Expatriate Management
September 2012

2. Executive Summary

More than 340 companies completed the survey and we have produced data based on program size, sector and other relevant criteria. The respondent list reads like a 'Who's Who of Global Mobility'.

30.6% of respondents in our survey were Global Heads of Mobility, and another 19% 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?

- Nearly 50% of Global Mobility Teams in this survey report to Compensation and Benefits/Reward, and 30.5% of teams report directly to VP Human Resources.
- A significant number of respondents believed that the Global Mobility function should report to VP HR (37.8%). This is up 5.8% from last year. Compensation and Benefits followed at 28.5% but this was a drop of 9% from last year.
- 41% of Global Mobility teams are centralized at one location. Large programs (1000+ assignees) tend to either have a central center of excellence with regional hubs or are centrally managed but in many locations.

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 to medium programs (up to 1000 assignees): the median Caseload ratio was 30 assignees per head
- For large programs (over 1000 assignees): the Median Caseload Ratio was approximately 68 assignees per head.
- These median numbers disguise a broad range that is influenced by the structure of the GMT itself. For smaller programs the person looking after Global Mobility may have additional roles. However the minimum in the survey that could be selected was 1 full time equivalent.

What services are outsourced?

- A total of 84% of respondents reported that they outsource Tax and 81% outsource Removals and Household Goods. Other highly outsourced services are Immigration and Relocation services (both with 78%).

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; \$10,534 for Tax, \$4,750 for Immigration, \$5,264 for Assignment and Vendor Management, \$3,948 for Relocation/Destination Services, \$8,475 for Removal/Household Goods, \$4,006 for Serviced Accommodation and \$2,790 for Payroll Services, \$1,751 for Expense Management, and \$336 for Technology.
- For medium sized programs, the cost per assignee for Tax was \$7,606, \$4,099 for Immigration, \$2,918 for Assignment and Vendor Management, \$3,961 for Relocation/Destination Services, \$5,443 for Removal/Household Goods, \$3,808 for Serviced Accommodation and \$886 for Payroll Services, \$651 for Expense Management, and \$1,713 for Technology.
- For large programs, the cost per assignee for Tax was \$2,632, \$951 for Immigration, \$1,942 for Assignment and Vendor Management, \$997 for Relocation/Destination Services, \$2,642 for Removal/Household Goods. There was insufficient data to produce cost information on Serviced Accommodation, 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 1,500	USD 2,000	USD 2,800
A Cost Projection (in USD)	USD 400	USD 650	USD 825
An entry/exit meeting (in USD)	USD 450	USD 500	USD 750
A UK Tax Return (in GBP)	GBP 750	GBP 1,000	GBP 1,600
A set up fee for your relocation management service provider	USD 500	USD 1,000	USD 1,900
A monthly fee for your relocation management service provider	USD 150	USD 295	USD 400
A repatriation fee for your relocation management service provider	USD 550	USD 950	USD 1,500
The cost of shipping a 20ft container between Europe and the US (in USD)	USD 8,250	USD 11,500	USD 15,000
A standard US visa (USD)	USD 1,500	USD 2,500	USD 4,500
A typical home search in a major US city (USD)	USD 800	USD 1,500	USD 3,000

How do firms monitor their vendor performance?

- According to the survey responses, a number of respondents gather this type of information through informal means instead of conducting a formal survey to determine the quality of service being provided.
- The highest share (47.6%) of respondents said they relied on assignee 'noise' and informal feedback, 28% reported that it was their vendors who conducted a survey for them and only 22.6% said they conduct a formal internal survey on assignee satisfaction.

How often does a firm go out to RFP?

- In the main service areas - Tax, Assignment and Vendor Management, Relocation/Destination Services, Removals and Household Goods, Serviced Accommodation, Expense Management and Technology the frequency with which a typical firm switches its main service providers is every 3 years. The majority of people switch their Payroll every 2 years and most respondents tend leave the RFP process for more than five years for both Immigration & Technology.

Vendor performance ratings

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

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

An insight in the current market

For the purpose of this study market share of the 9 principal sectors were analyzed and assessed.

- For Tax, PwC lead with a market share equivalent to 26%.
- Fragomen remained dominant with 45% of the market share for Immigration.
- Cartus had the greatest share of the assignment and vendor management market, closely followed by Weichert, Brookfield and TheMIGroup. Cartus also had the greatest share of the relocation/destinations services market (15%), followed by Crown World Mobility and Brookfield
- Crown World Mobility was the dominant provider in the Removals/Household Goods market with a 13% share, followed by Cartus, Brookfield, Weichert and Interdean/Santa Fe
- ADP had a 26% share in the payroll market.
- Equus and KPMG both hold the number one position in the area of Technology with 18% of the market share each.

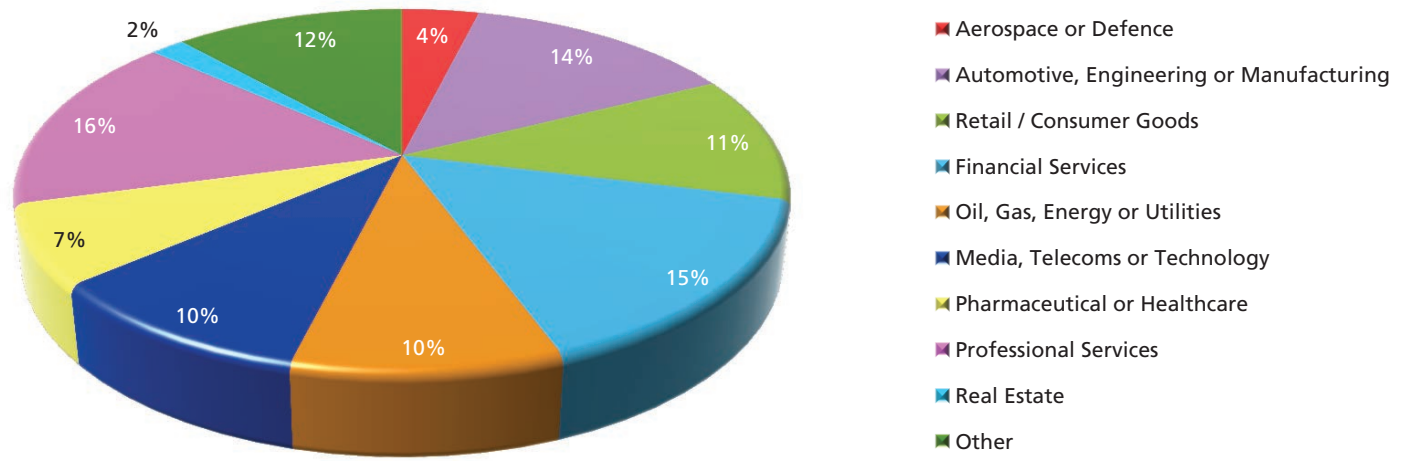
3. Participant Demographics

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 three main industries. The top two industry sectors were the Professional services sector and the Financial Services sector. Both sectors consisted of 14%

of the total survey respondents. These were closely followed by Retail/Consumer Goods with 12% of the survey population. 10% of the respondents were from the Automotive, Engineering or Manufacturing sector.

Industry Sector

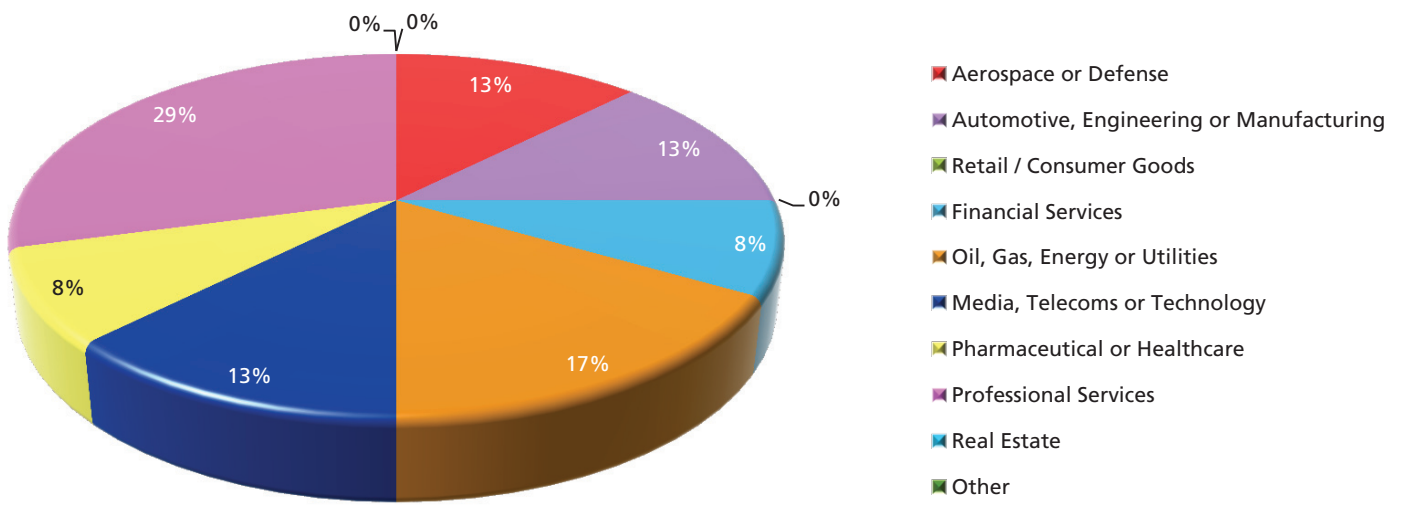


Detailed Analysis

Organizations with large programs were in the Professional Services sector (29%), followed by Oil, Gas, Energy or Utilities sector (17%) with the Aerospace or Defense sector and the Automotive,

Engineering or Manufacturing sector (both with 13%). The Pharmaceutical or Healthcare sector, Media, Telecoms or Technology and the Financial Services sector were indicated by only 8% of respondents.

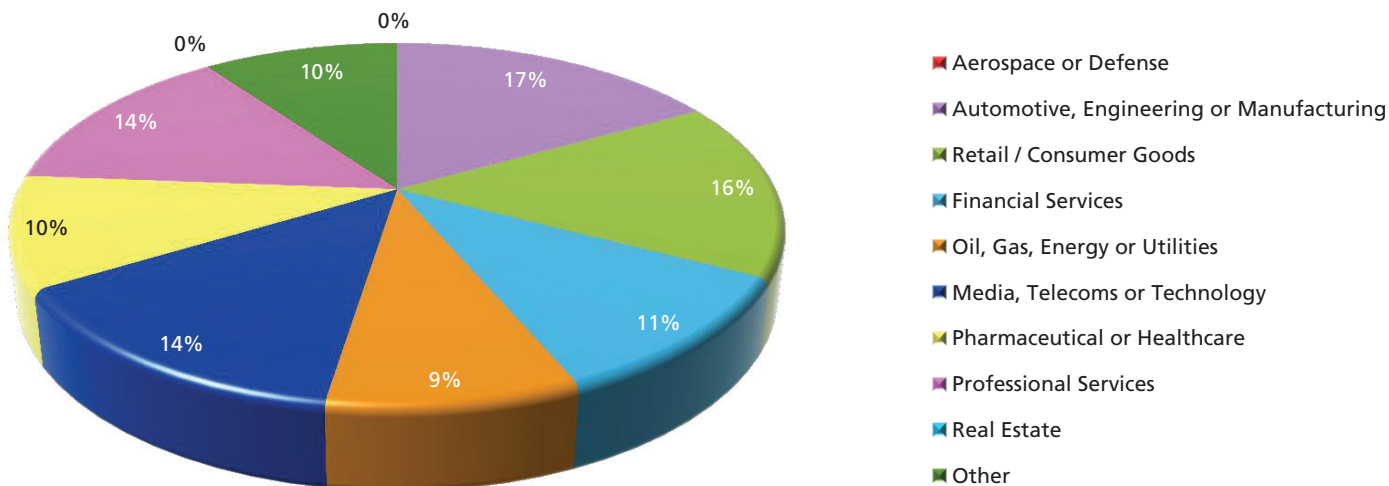
Industry Sector for Large Programs



On the other hand, 17% of organizations with small programs were located in the Automotive, Engineering or Manufacturing sector, followed by 16% in the

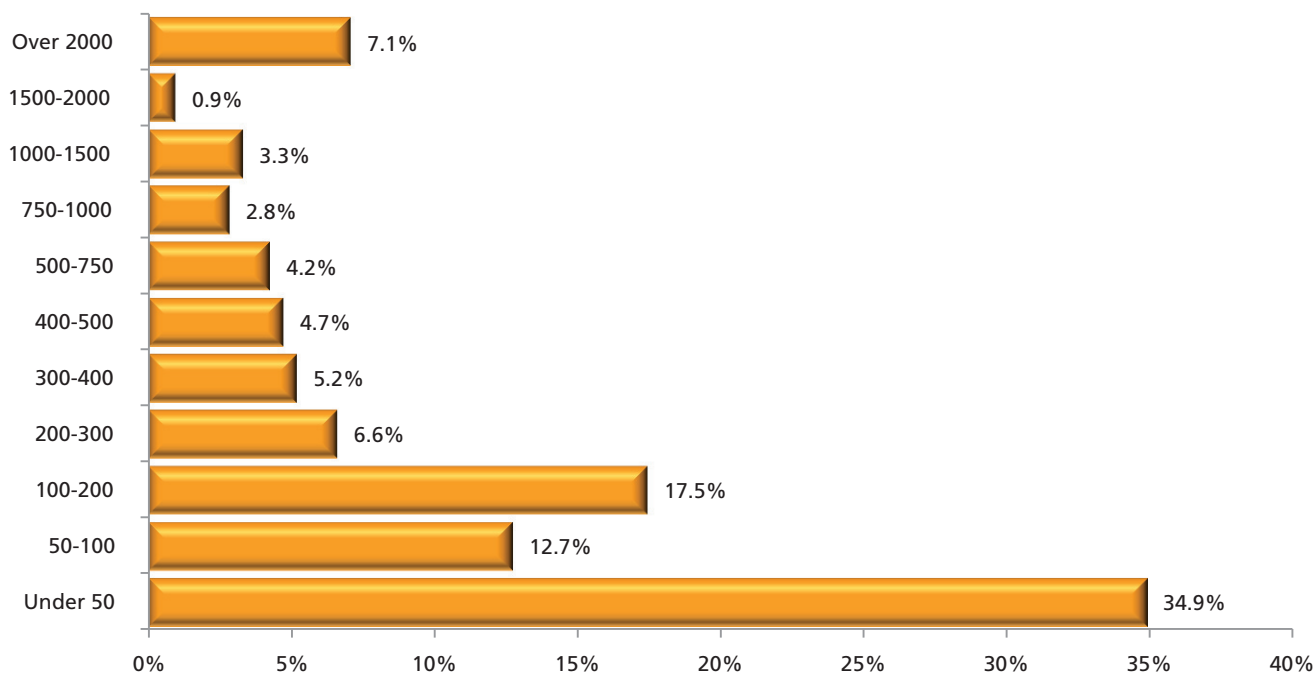
Retail/Consumer Goods sector. 14% of organizations were located in both, the Media, Telecoms or Technology sector and the Professional Services sectors.

Industry Sector for Small Programs



Number of Assignees

Over 47% of respondents have fewer than 100 assignees, around 41% have between 100-1000 assignees, and just over 11% 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).

The median number of assignees is around 75. The inter-quartile range for Global Mobility Programs is 30 - 250. The upper decile programs start at 890 assignees.



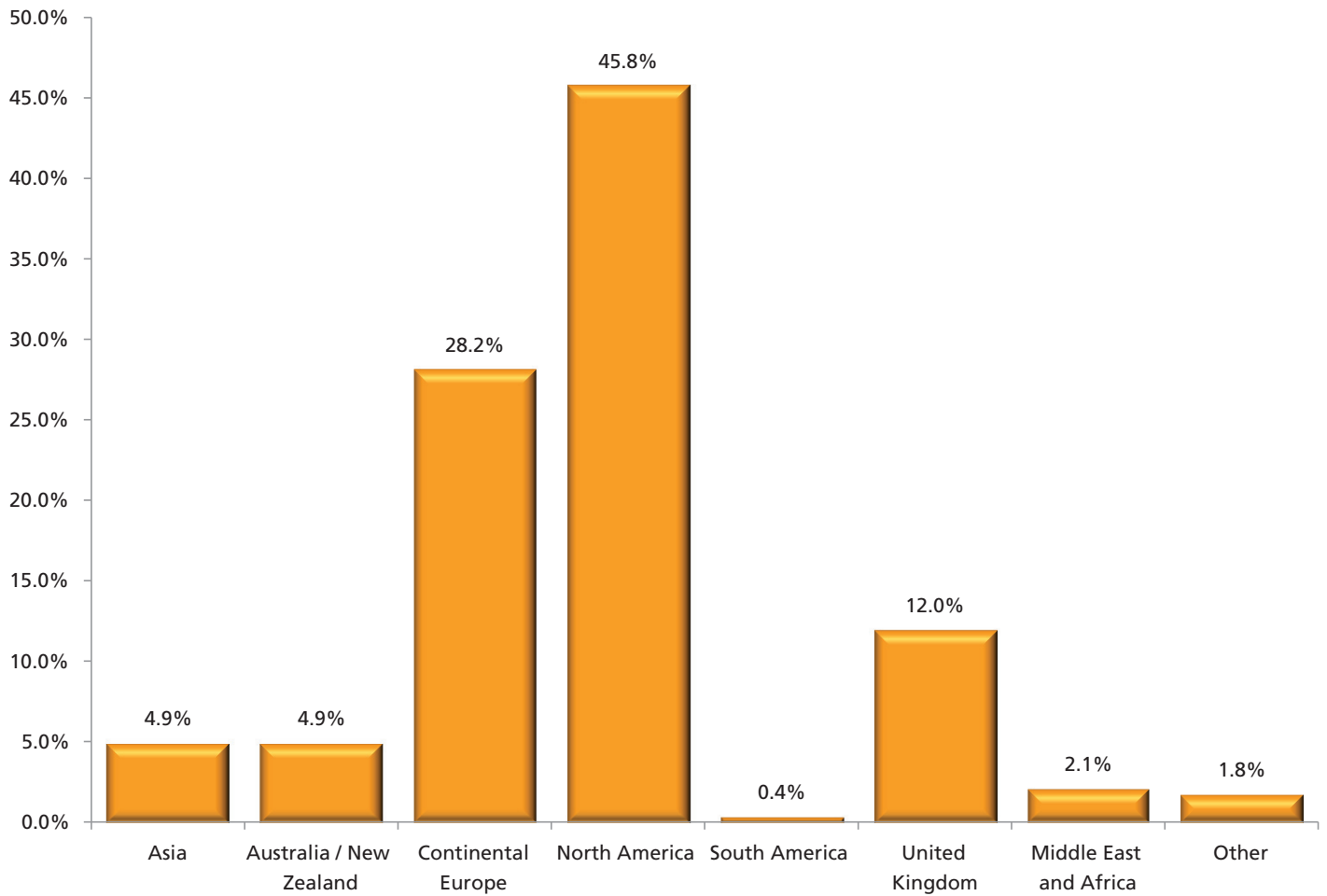
Interesting fact:

There is a strong correlation between industry sector and program size. The large programs tended to be based in the Professional Services, Oil Gas, Energy or Utilities and Aerospace or Defense sectors, smaller programs had a more even split across industry sectors except for Aerospace or Defense where they did not feature at all.



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

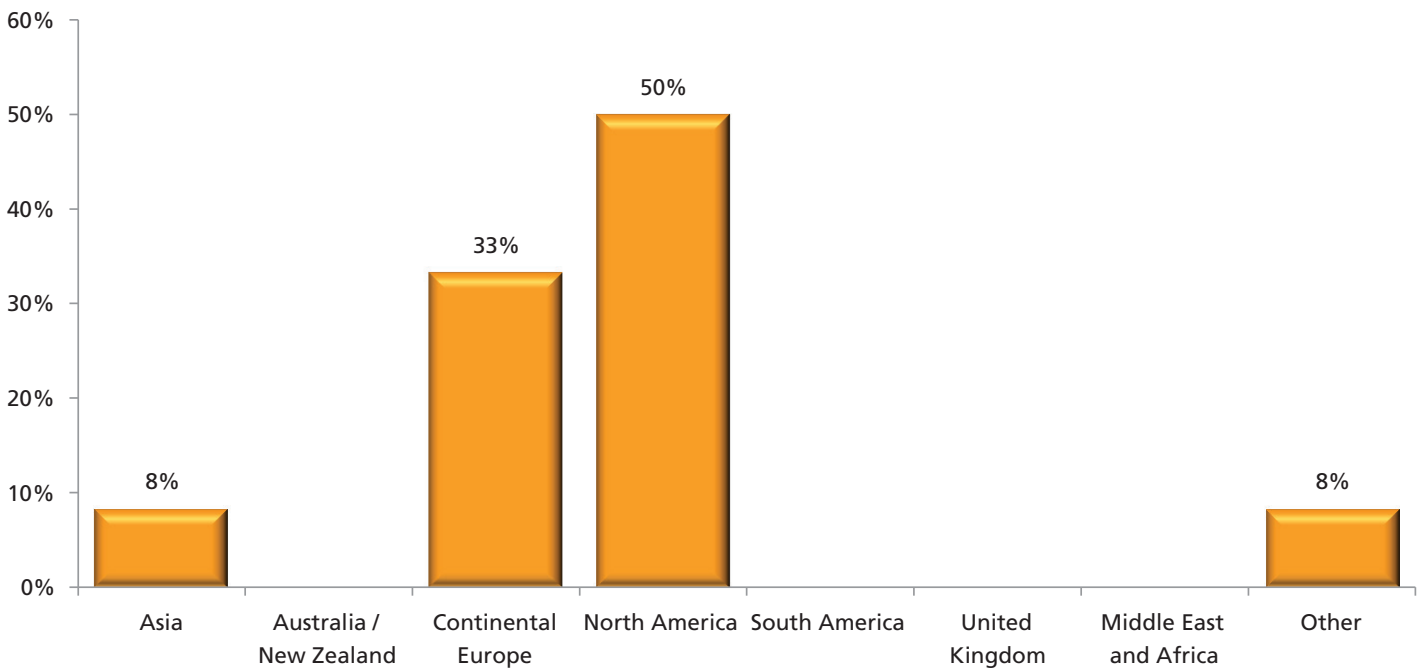
Headquarter Location for all Companies



Almost 46% of the survey respondents were from North America, compared to 12% in the UK and just over 28% in Continental Europe.

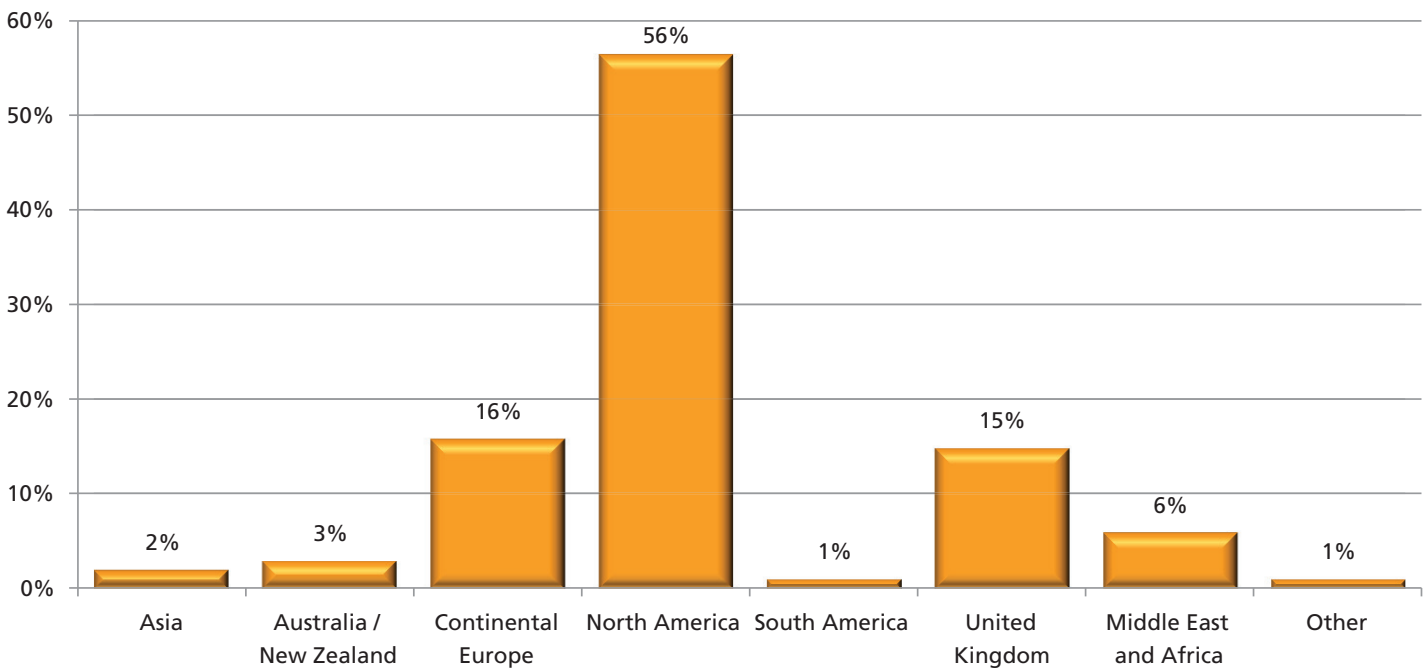
The more detailed analysis showed that the HQ location of these organizations with large programs shifted

Headquarter Location for organizations with Large Programs



The proportions differed in the organizations with small programs, with 56% HQ located in North America and 31% in Europe – 16% in Continental Europe and 15% in the United Kingdom.

Headquarter Location for organizations with Small Programs



Interesting fact:

There are almost the same numbers of organizations headquartered in the UK as there are in the rest of Europe combined.

4. The Global Mobility Function

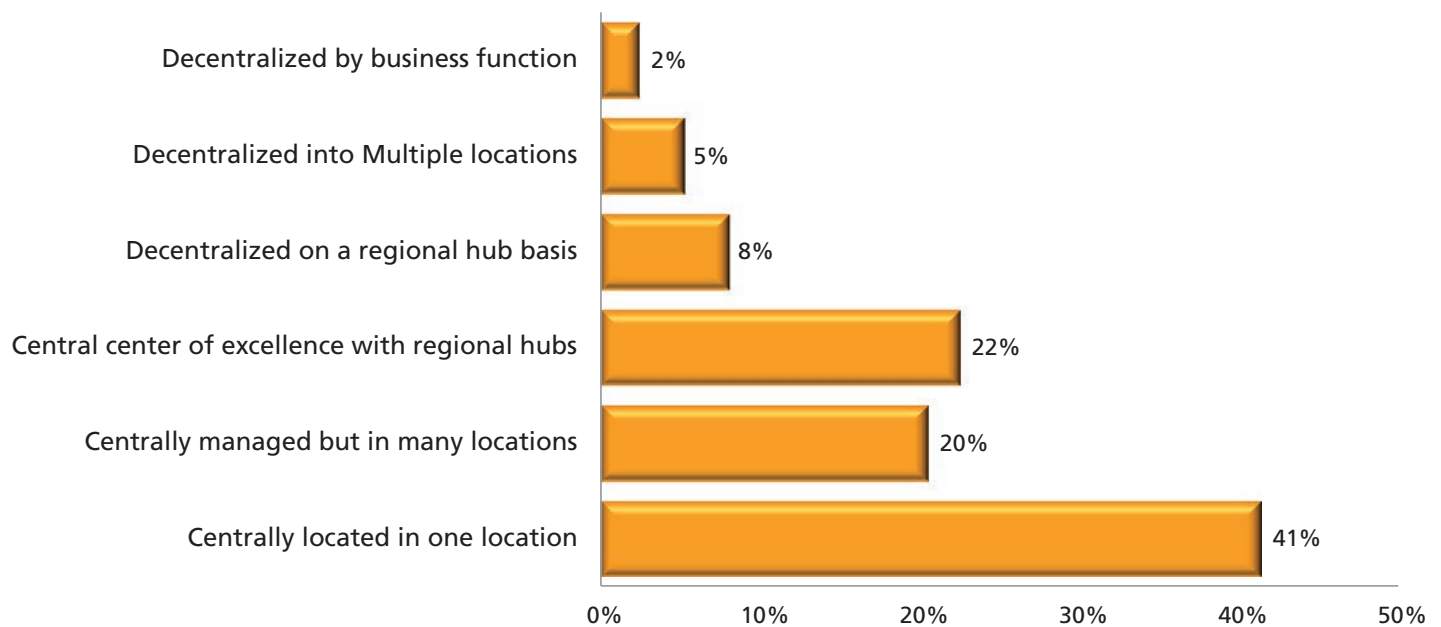
This section explores the Global Mobility Function with a deeper insight into the structure of the Global Mobility Teams (GMT). The study investigated whether organizations were centrally located in one location or decentralized on a regional hub basis or multiple locations. Results clearly showed that 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).

41% of the survey population reported their GMT was centrally located in one location. 22% said they had a center of excellence with regional hubs. 20% stated that their GMT was centrally managed but split in many locations. 8% have decentralized their GMTs

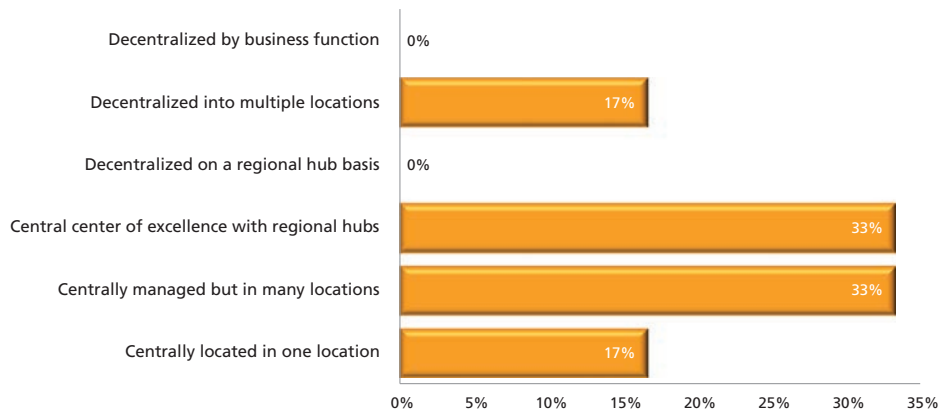
on a regional hub basis. 5% are decentralized into multiple locations and only 2% are decentralized by business function. However there are some differences between small and large programs in this scope.

Structure of Global Mobility Teams



Detailed Analysis

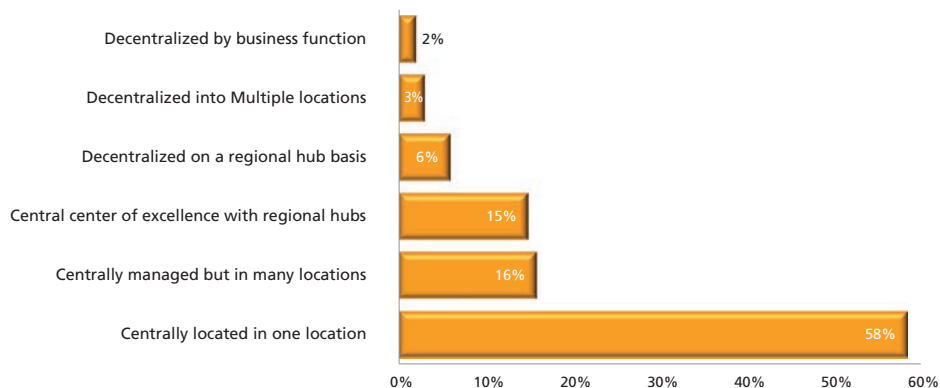
Structure of Global Mobility Teams (Large Programs)



The analyzed data shows that a third of the respondents with large programs reported that their GMTs were centrally managed but in many locations and another third reported that their GMT had a central center of excellence with regional hubs. Only 17% of respondents had their GMT centrally located in one location and the remainder had their GMT decentralized into multiple locations.

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. 16% of respondents with small programs reported that their GMTs were centrally managed but in many locations, and 15% reported that their GMT had a central center of excellence with regional hubs. Just 6% were decentralized on a regional hub basis, 3% decentralized into multiple locations and 2% decentralized by business function. 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 a centrally managed GMT but in many locations, and GMT's looking after smaller programs tending to opt for being centrally located in one location.

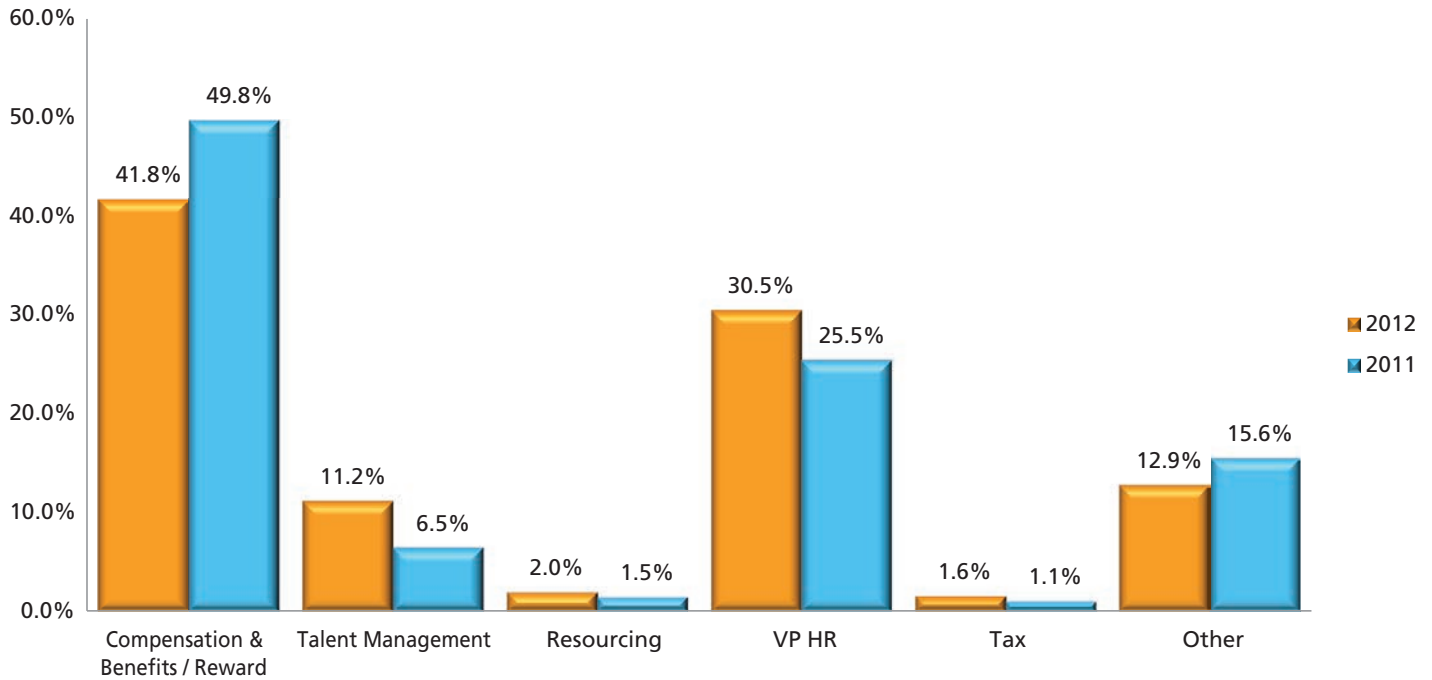


Interesting fact:

Program size influences Global Mobility Team (GMT) structure. Small programs tend to be centralized in one location and large programs tend to be managed in multiple locations or with regional hubs but have a center of excellence or are managed centrally.



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

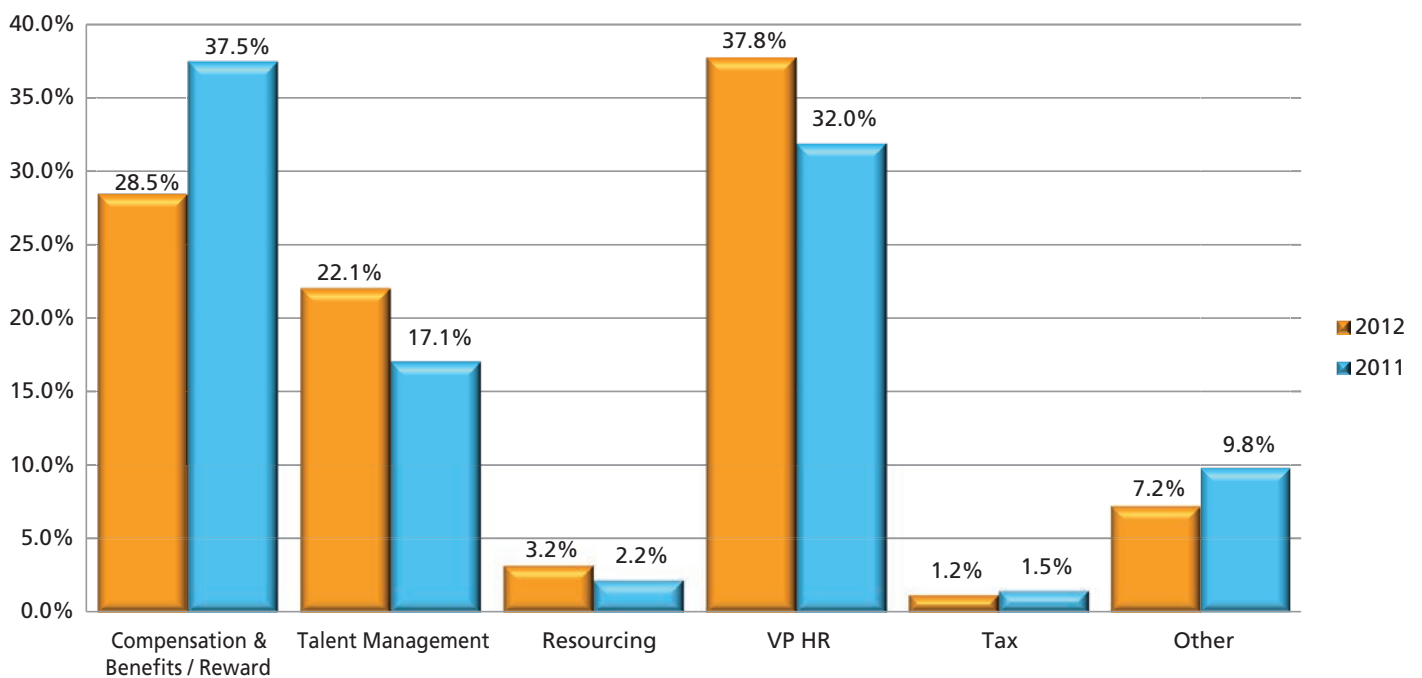


Results for the whole survey population show that almost 42% of the respondents report into Compensation and Benefits/Reward. This has decreased from the previous year. VP HR saw an increase of respondents reporting into this department from 25.5% last year to 30.5% this year. Last year 6.5% of the respondents reported into Talent Management and this

has increased to 11.2% this year. Finally, 2.0% of the respondents report into Resourcing and 1.6% 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 should report?



Compared to last year there is almost a 9% drop 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 increased.

From these results, it can be observed that out of the 42% of Global Mobility Teams that report directly into Compensations and Benefits, around 13 % of those respondents claim that they would prefer to change their reporting line. As anticipated, most of the respondents would prefer to change their reporting line to VP HR or Talent Management as it is probably considered a more relevant area to report into. Respondents also believed that there should be more reporting into Resourcing and less reporting 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. As can be seen there is a growing trend for the Global Mobility function to report into Talent Management, with those who actually report into this area at 11.2% (up from 6.5% last year) and those who believe they should at 22.4% (up from at 17.1% last year). The figures reflect that Global Mobility teams may be wishing to become more closely associated with the overall people strategies of their organizations. In addition an assignment is often costly and organizations are eager to retain their top talent and realize their return on investment (ROI). To do this successfully requires career planning before, during and after the assignment.

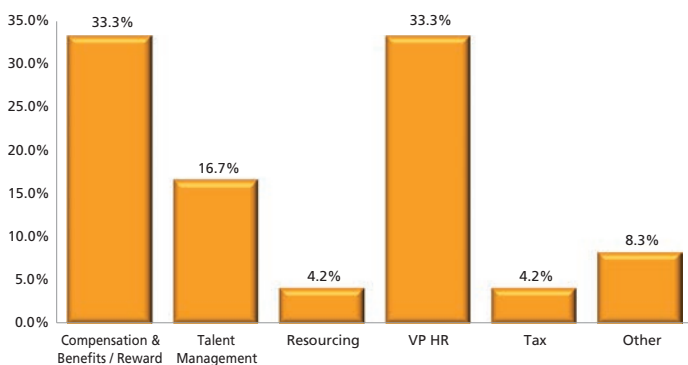
Interesting fact:

Almost 42% of Global Mobility Teams report into Compensation and Benefits/Reward but 13% 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.

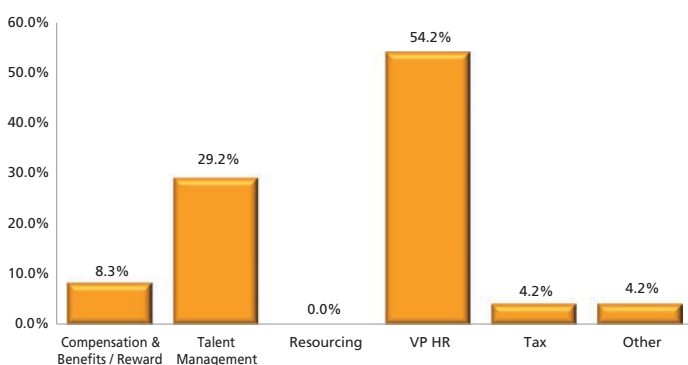
Where does your Global Mobility report within your overall organization (Large Programs)?



Results show that for large programs (over 1000 assignees) two thirds of the organizations reported into VP HR or Compensation & Benefits/Reward. 16.7% report into Talent Management. Just over 4% of the respondents reported into Resourcing or Tax and 8.3% 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 should report (Large Programs)?

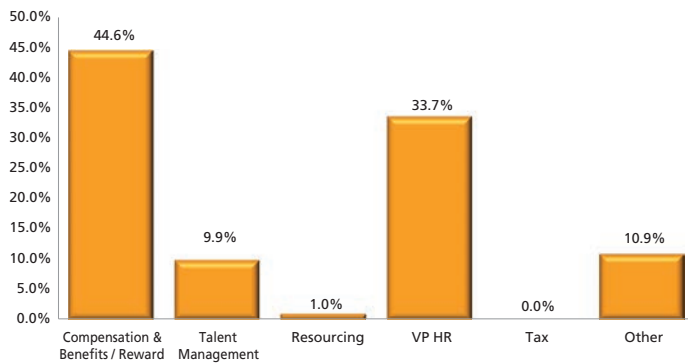


According to the survey results, there is a dramatic increase in the number of professionals who would like to report into VP HR, 54.2% compared to the 33.3% who are currently doing so. As for Compensation & Benefits/Reward, of the 33.3% of respondents currently reporting into that area, over two thirds of them would like to make a switch in their reporting line. The number wishing to report into Talent Management was almost double the amount that is currently reporting into Talent Management. Only 8.3% claimed they still wish to report into Compensation & Benefits/Reward.

None of the respondents believed they should report into Resourcing. There was no change in the number that currently report in Tax and believe they should report into Tax.

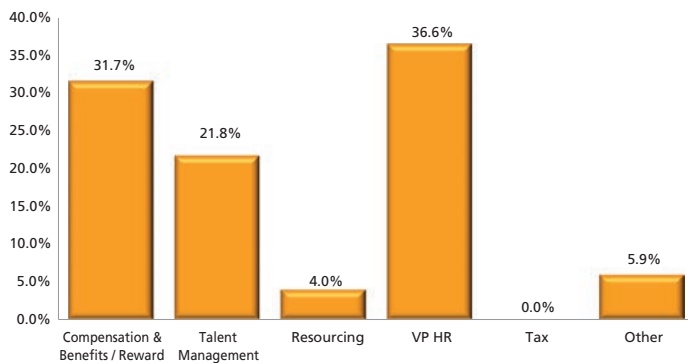
Respondents with smaller programs had different practices and viewpoints regarding reporting lines.

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



A clear majority of the respondents for small programs (less than 100 assignees) report into Compensation & Benefits/Reward (44.6%). A third reported into VP HR, followed by 9.9% reporting into Talent Management. 10.9% of the respondents reported into other parts of the organization and these included Shared Services, Recruiting, and Benefits. A small number of respondents said they reported into Resourcing (1.0%) and none of the respondents with small programs reported into Tax.

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



The majority of respondents for small programs believe they should report into VP HR (36.6%). Of the 44.6% that currently report into Compensation & Benefits/Reward just over a quarter of those respondents believe they should switch their reporting line.

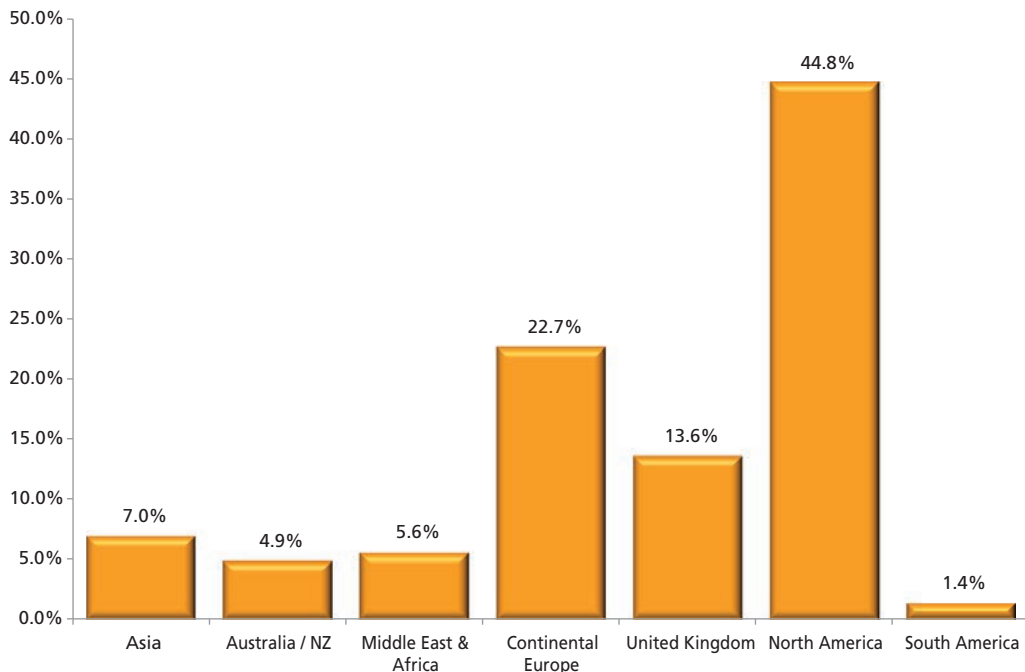
Interestingly, the number of respondents that wished to report into Talent Management was more than double the number that currently are.

A small number of respondents (4.0%) thought they should report into Resourcing but none of the small organizations thought they should switch their reporting line to Tax.

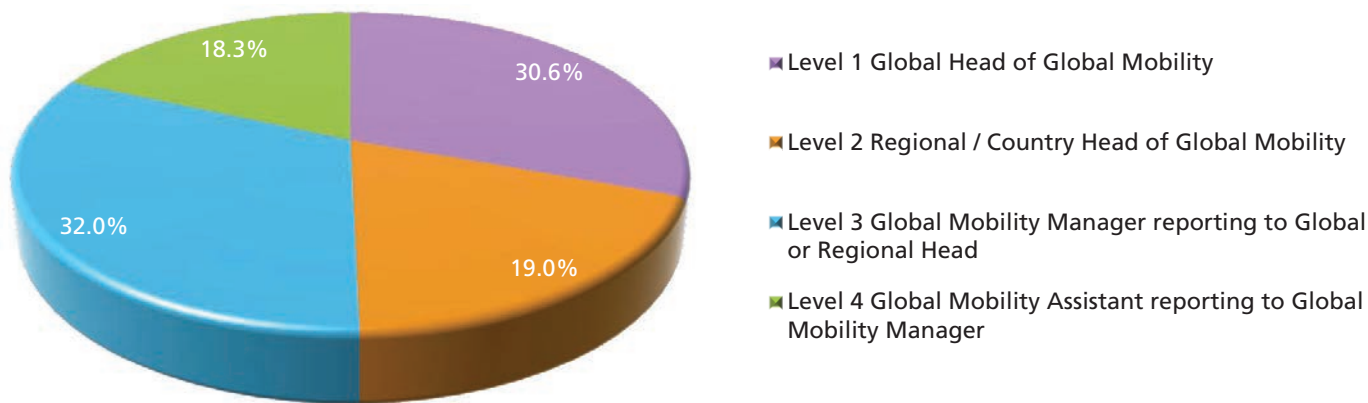
Where is the Head of Global Mobility located?

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 44.8% located

in North America, 22.7% in continental Europe, 13.6% in the United Kingdom, 7.0% in Asia, 5.6% in the Middle East & Africa, 4.9% in Australia or New Zealand and 1.4% in South America.



Job Role of survey respondents



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

A high number of respondents were Global Heads of Global Mobility (30.6%) and 19.0% were Regional/ Country Heads of Global Mobility. A further 32.0% were Global Mobility Managers and 18.3% 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.

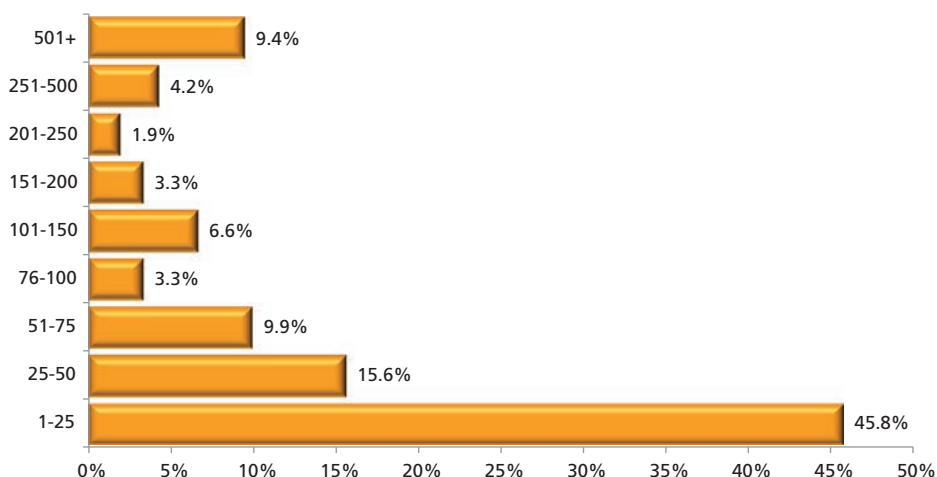
Nevertheless, our survey data has allowed us to draw some tentative observations about benchmark levels of assignee caseload per GM professional.

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 15 per head.

For larger programs (over 1000 assignees), the median Caseload Ratio is 68 per head. This means that 50% of the large sized programs had 1 global mobility professional handling around 68 assignees suggesting that large programs clearly operate on economies of scale.

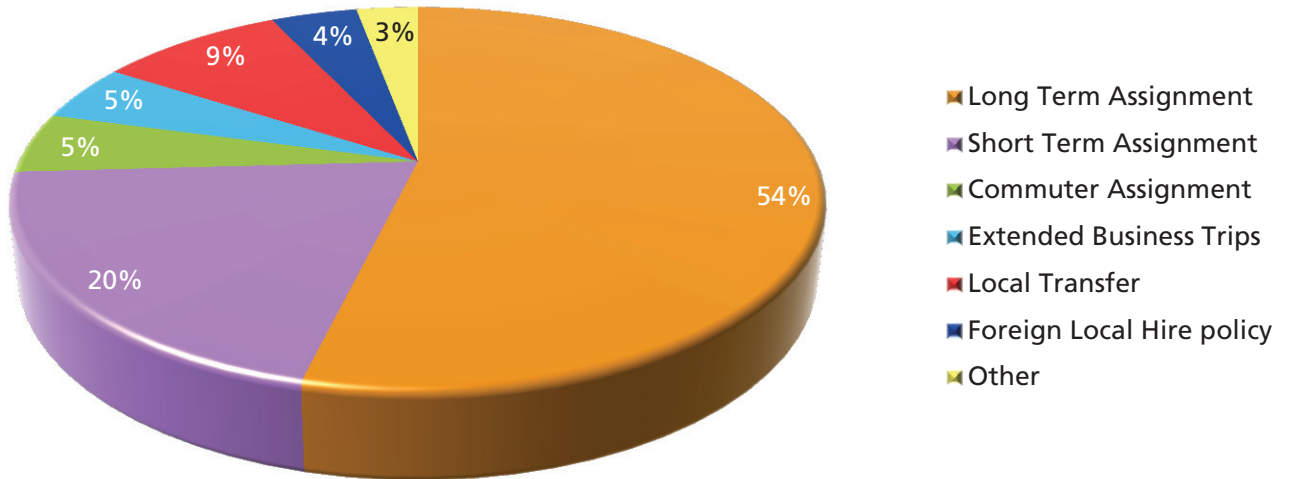
Assignment Initiations in the last 12 months



The graph above shows that over 45% of the respondents initiated between 1 and 25 moves in the last 12 months. 15.6% initiated between 25 and 50 moves,

9.9% initiated between 51 and 75 moves and 9.4% 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. Commuter Assignments and Extended business trips are both at 5% each with foreign local hires making up just 4%.

Cost of running the Global Mobility Function

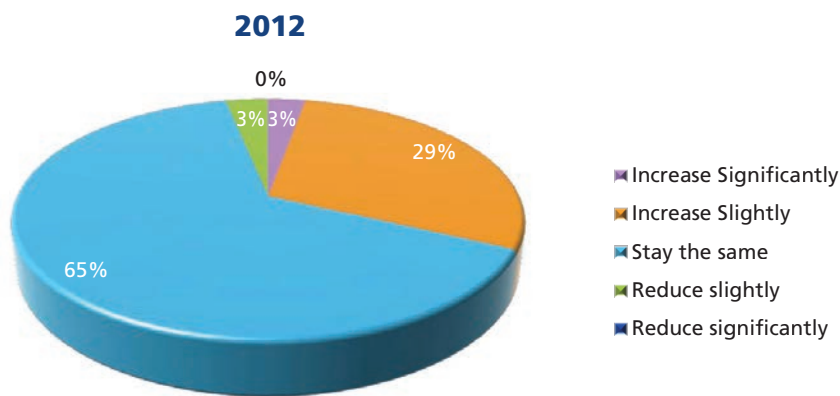
Survey participants were asked to indicate their overall pay bill (base salary plus bonus only) for their Global Mobility Team. From this analysis we can estimate that the average cost of running a Global Mobility Team is \$5,255 per assignee. (This is purely the salary/bonus cost only and does not include benefits or establishment overheads).

The inter-quartile range for running a Global Mobility Team is \$1,705 - \$7,455 per assignee.

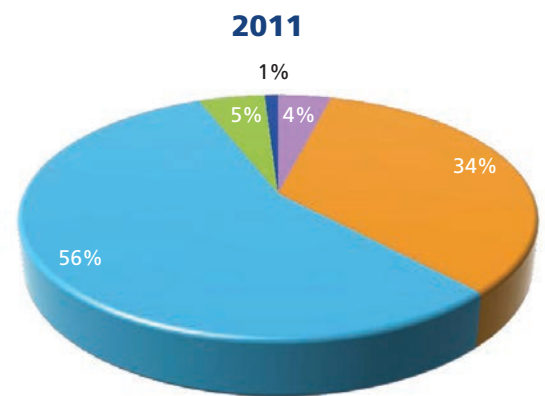
The average salary (including bonus) of Global Mobility Professionals throughout all industry sectors and all geographies is \$ 99,958 with an inter-quartile range of \$60,000 - \$112,500.

Future outlook

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

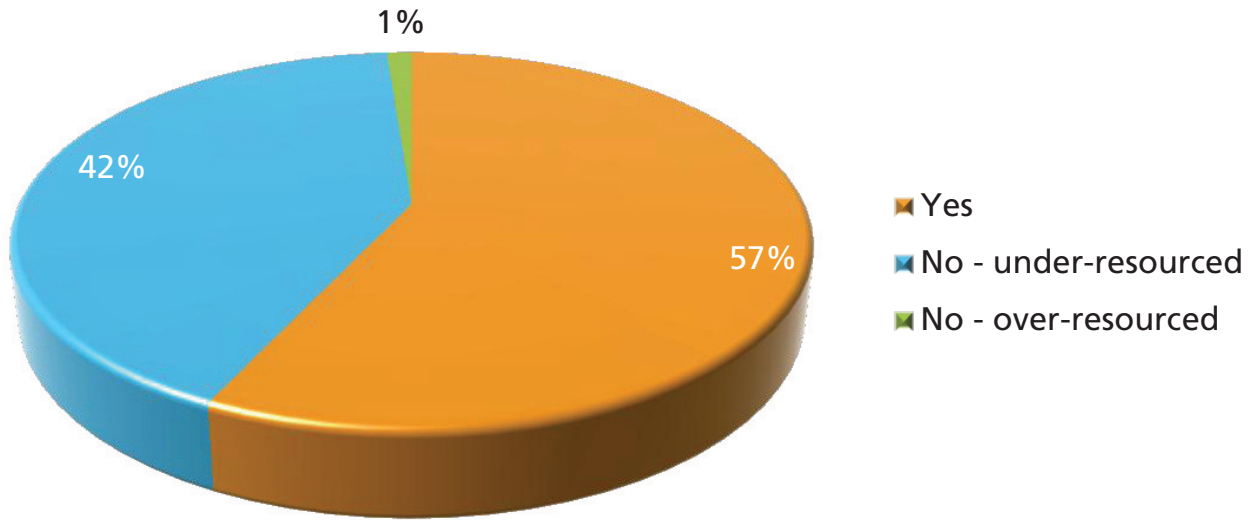


According to these results, a clear majority of the respondents believed that the number of people working in their Global Mobility Team would remain the same over the next 12 months. This is up 9% from last year. 29% of the respondents thought that the number of people working in their Global Mobility Team would increase slightly. This is down 5% from last year. 3% thought there would be a significant increase – this is slightly less than last year.



There was a 2% decrease, 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 but none of the respondents this year thought the number of people working in their Global Mobility Team would decrease significantly. Hence it can be seen that almost a third of the respondents are expecting an increase in the number of people working in their Global Mobility Team.

Is your Global Mobility function resourced correctly?



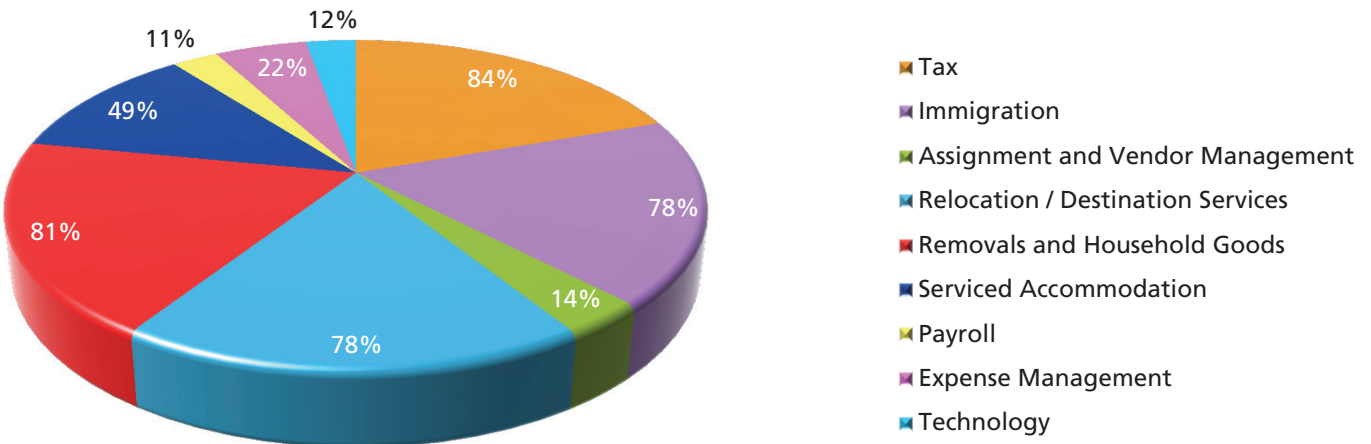
The survey respondents were asked if they felt their Global Mobility Function was resourced correctly.

Over half felt they were resourced correctly and 42% felt they were under-resourced. Only 1% 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

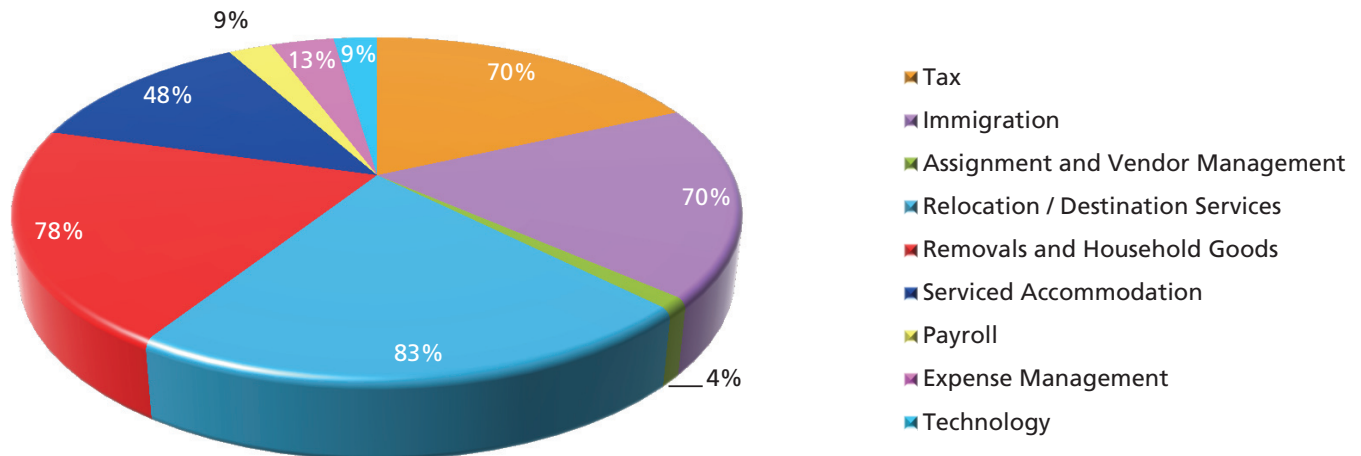


84% of respondents outsource Tax, closely followed by nearly 81% of respondents outsourcing Removals and Household Goods. The next two highly outsourced services were Immigration (78%) and Relocation Services (78%). Just under half outsourced Serviced

Accommodation. Expense Management was outsourced by 22% of the respondents. The three services outsourced least by respondents were Assignment and Vendor Management (14%), Technology (12%), and Payroll (11%).

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 more Relocation/Destination services. As the chart shows, the number increases by 5%. On the other hand, for the rest of the services outsourcing decreased in amount. Large programs seem to outsource less of their Tax services (decreased by 14%),

Immigration services (decreased by 8%), Assignment and Vendor Management services (decreased by 10%), Removals and Household Goods (decreased by 3%), Serviced Accommodation (decreased by 1%), Payroll Services (decreased by 2%), Expense Management (decreased by 9%) and Technology (decreased by 3%).

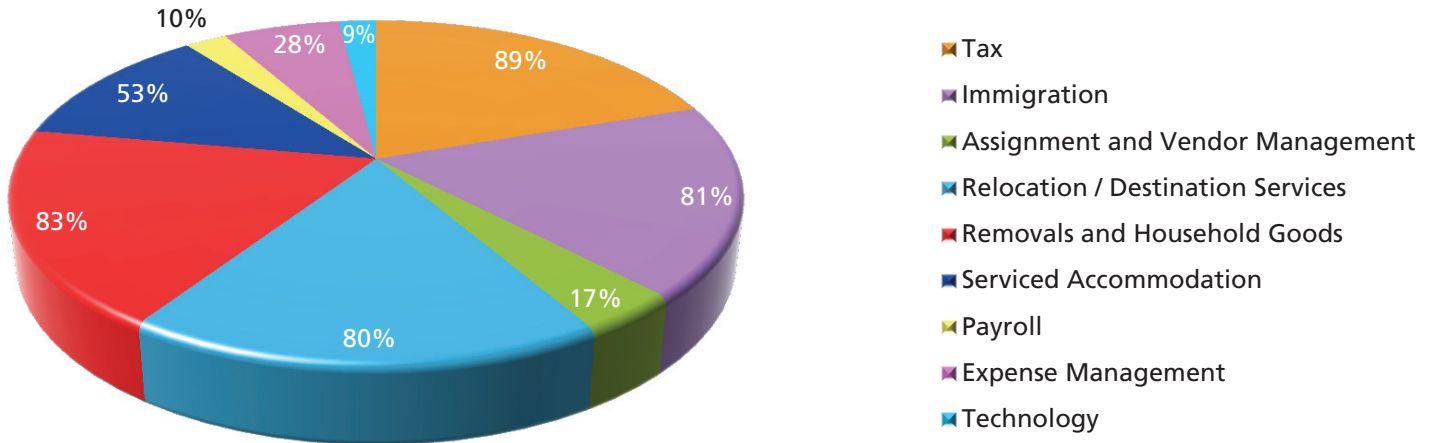


Interesting fact:

Organizations with large programs outsource less except for Relocation/Destination 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 more across all service areas apart from Payroll and Technology which slightly decreased. Outsourcing of Expenses Management increased by 6%, Tax services increased by 5%,

Serviced Accommodation increased by 4%, Immigration and Assignment and Vendor Management both increased by 3%, Relocation/Destination Services and Removals and Household goods services both increased marginally by 2%.



Interesting fact:

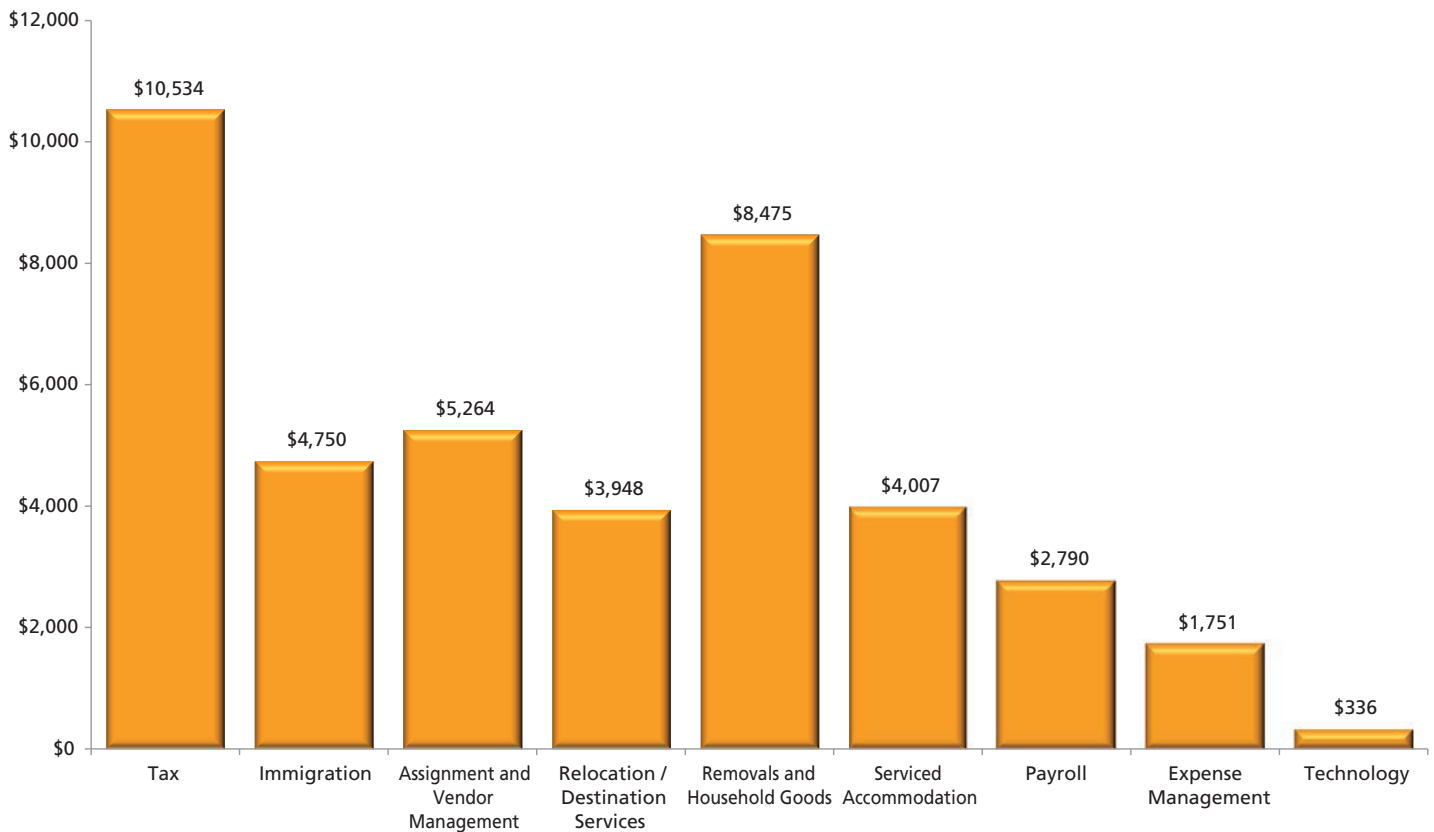
Organizations with relatively small programs outsource more of their assignment services.

Outsourced Services Cost 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.

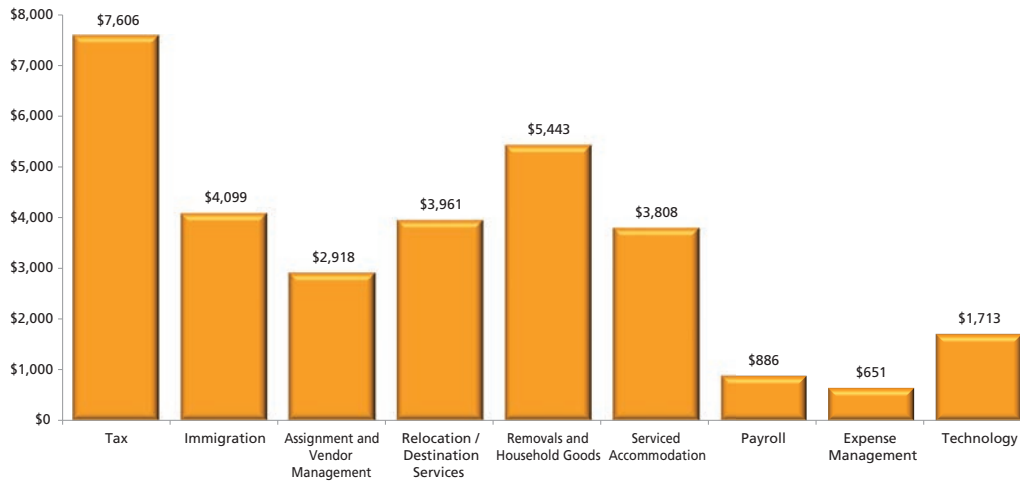
Cost per Assignee for Small Programs (less than 100 Assignees)



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 (\$10,534 per assignee), followed by Removal/Household Goods with an average of \$8,475 per assignee. Technology is the lowest cost for assignees on small programs with an average cost of \$336 per assignee.

The average costs for the other services in relation to small programs include Immigration cost of \$4,750 per assignee and Assignment/Vendor Management with an average of \$5,264.

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,

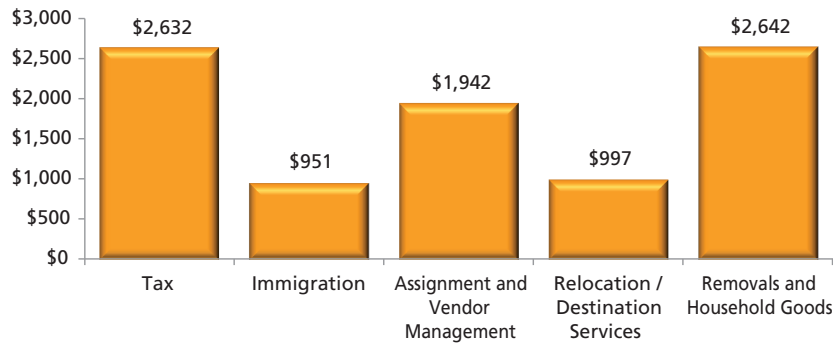
Immigration, Assignment/Vendor Management and Removals/Household Goods). Surprisingly, the cost of Technology Services has increased from \$336 in small programs to \$1,713 in medium programs.



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 and Removals and Household Goods.

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



In large programs all costs have fallen. Interestingly, the cost of Tax (\$2,632) is a quarter of the cost when comparing it to small programs (\$10,534). Immigration was the least costly for assignees in large programs with an average of \$951.

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



Interesting fact:

Organizations with large programs spend a quarter 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 1,500	USD 2,000	USD 2,800
A Cost Projection (in USD)	USD 400	USD 650	USD 825
An entry/exit meeting (in USD)	USD 450	USD 500	USD 750
A UK Tax Return (in GBP)	GBP 750	GBP 1,000	GBP 1,600

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

Relocation Services	Lower Quartile	Median	Upper Quartile
A set up fee for your relocation management service provider	USD 500	USD 1,000	USD 1,900
A monthly fee for your relocation management service provider	USD 150	USD 295	USD 400
A repatriation fee for your relocation management service provider	USD 550	USD 950	USD 1,500
The cost of shipping a 20ft container between Europe and the US (in USD)	USD 8,250	USD 11,500	USD 15,000
A typical home search in a major US city (USD)	USD 800	USD 1,500	USD 3,000

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

Immigration Services	Lower Quartile	Median	Upper Quartile
A standard US visa (USD)	USD 1,500	USD 2,500	USD 4,500

The immigration services have a large interquartile range of \$1,500 and \$4,500

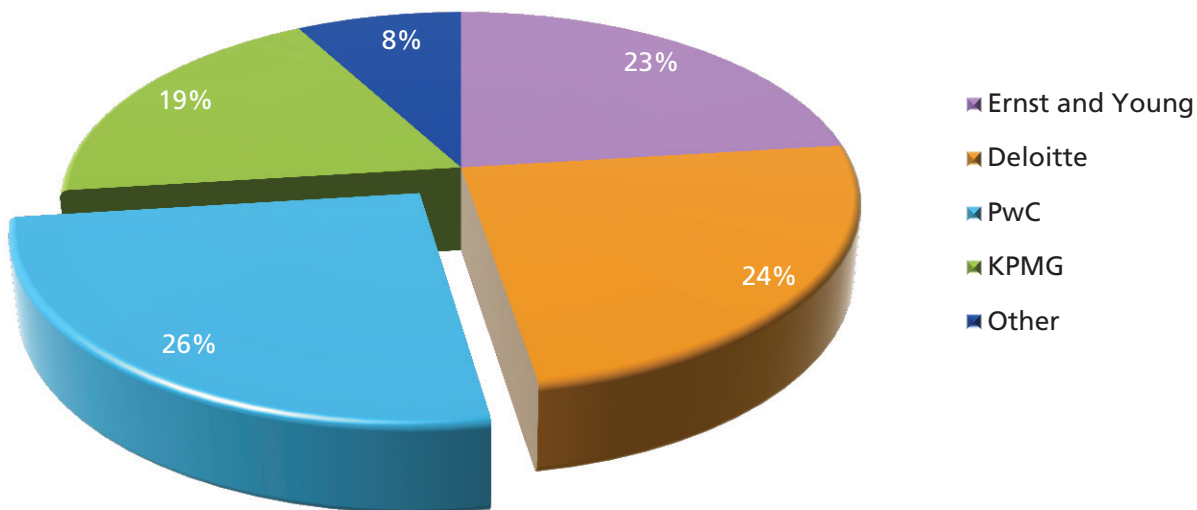
6. Market Share Analysis

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 investigated (including Tax, Immigration, Assignment and Vendor Management, Relocation/Destination Services, Removal/Household Goods, Serviced Accommodation, Payroll, 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 24%. Ernst & Young occupies 23% market share, followed by KPMG

with 19%. Other firms in the business account for 8% market share. This is up by 4% from last year indicating that other firms are beginning to creep into the market that is dominated by the big four.

Top 4 Service Providers by Market Share

- 1 PricewaterhouseCoopers
- 2 Deloitte
- 3 Ernst and Young
- 4 KPMG

Other firms used by the survey respondents include:

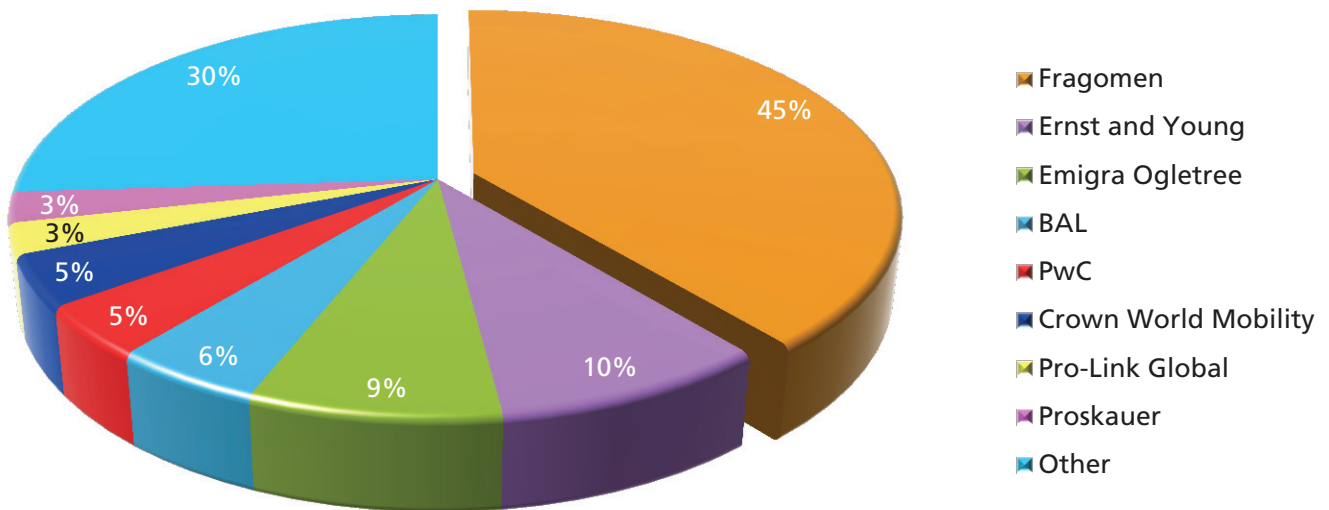
Adelaide Financial Inc, Baker Tilly, BDO, Crowe Clark Whitehill, Global Tax Network, Grant Thornton, John Allis & Co, Mazars, Moore Stephens, WTS Alliance and Stibbs & Co



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 staggering 45% market share which is the same as last year. Fragomen’s market share is equal to just under the rest of the top ten firms combined. Outside of Fragomen, Ernst & Young have 10% of the market

share, Emigra Ogletree have 9%, BAL have 6%, both PricewaterhouseCoopers and Crown World Mobility have 5%, and Pro-Link Global and Proskauer have 3% of the market share each. 30% of respondents reported using 28 different firms which have 1% or less of the market share each.

Top 5 Service Providers by Market Share

- 1 **Fragomen**

- 2 **Ernst and Young**

- 3 **Emigra Ogletree**

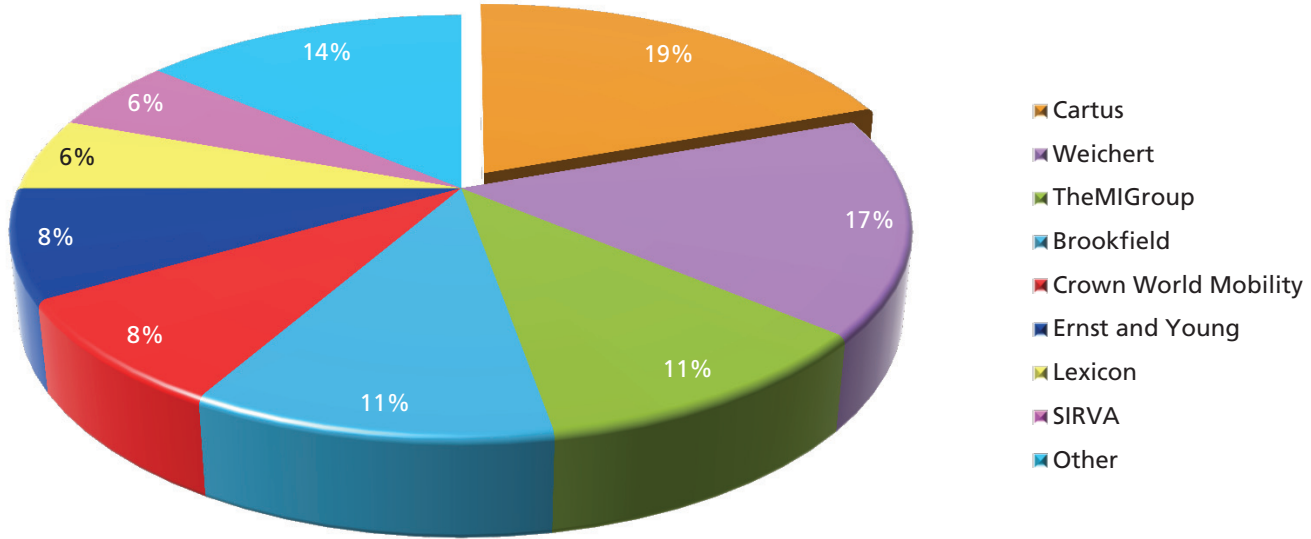
- 4 **BAL**

- 5 **PricewaterhouseCoopers
Crown World Mobility**

Other firms used by the survey respondents include:

Baker and McKenzie, BCF LLP, BD&P LLP, Bedell, Blake, Cassels & Graydon LLP, Clark Hill Plc, CMS, Deloitte, DWI, Ezer Law Group, Faegre Baker Daniels LLP, FosterQuan LLP, Goldblum & Hess, Greenberg Turner, Kingsley Napley, KPMG, Lewis Silkin, Magrath LLP, Mintz Levin, Morgan Lewis, Quarles & Brady LLP, Sarah Buttler Associates Ltd, Satterlee Stephens Burke & Burke LLP, Seyfarth Shaw LLP, Smith Stone Walters, Team Relocations, TozziniFreire, Zulkie Partners LLC.

**Assignment/Vendor Management
Market Share**



Cartus has a market share of 19%, Weichert follows with 17%. TheMIGroup and Brookfield both have 11%.

The top three are followed by Crown World Mobility and Ernst & Young with 8%. Lexicon and SIRVA have a market share of 6% each.

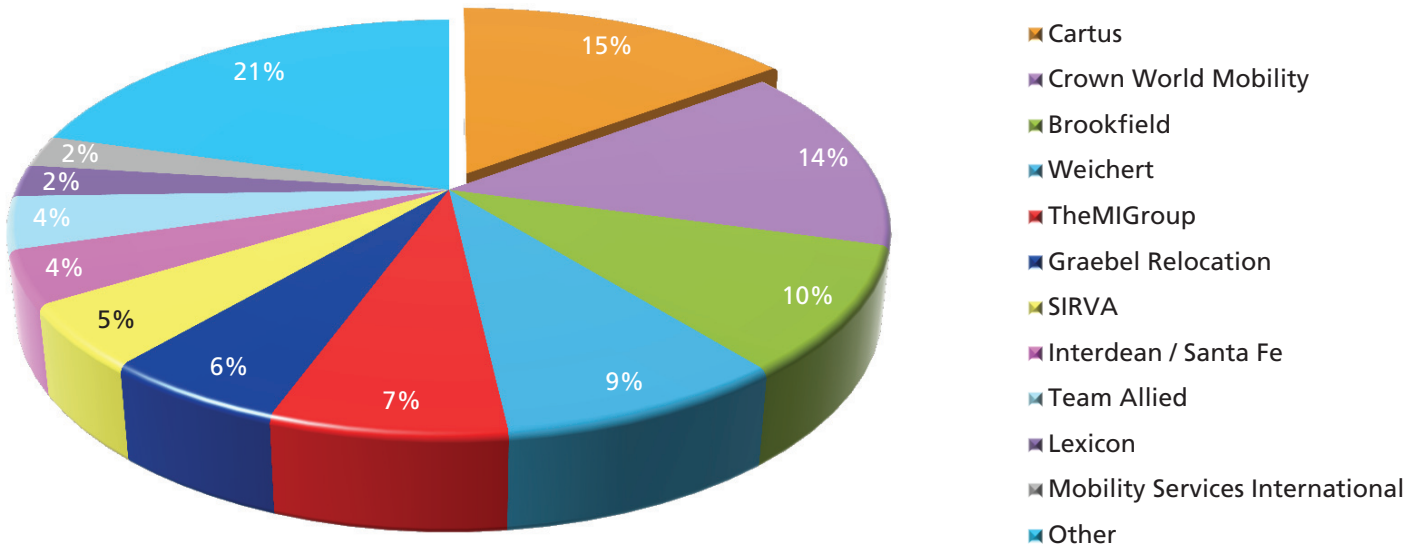
Top 5 Service Providers by Market Share

- 1 Cartus
- 2 Weichart
- 3 TheMIGroup
- 4 Brookfield
- 5 Crown World Mobility
Ernst & Young
Lexicon
SIRVA

Other companies that our respondents use include:
Deloitte, Graebel Relocation, IPM, Mobility Services International and Team Allied.

Relocation/Destination Services

Market Share



Cartus has market share of 15%, Crown World Mobility has 14% and Brookfield has 10% market share. Weichert follows with 9%.

TheMIGroup have 7%. These companies are closely followed by Graebel Relocation with 6% and SIRVA with 5% market share.

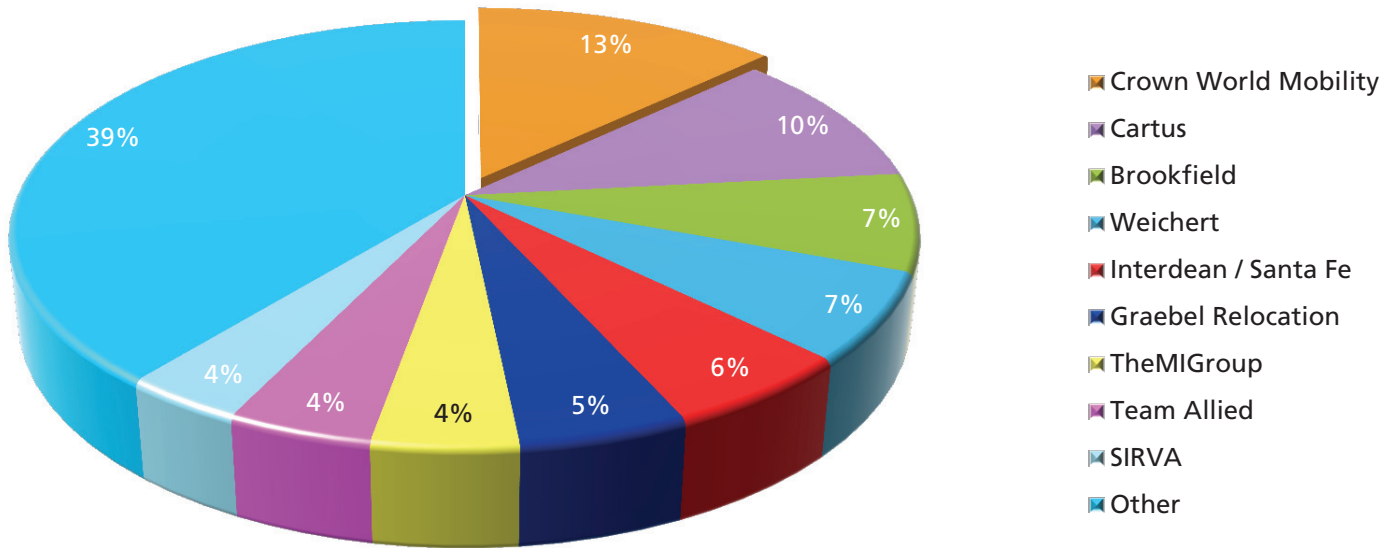
Top 5 Service Providers by Market Share

- 1 **Cartus**
- 2 **Crown World Mobility**
- 3 **Brookfield**
- 4 **Weichert**
- 5 **TheMIGroup**

Other companies that our respondents use include:

AIReS, Alfa Relocations, Altair Global Reloaction, Asian Tigers, Bridgestreet, Cultural Awareness International, Daryl Flood, EMDOC Relocation Services, Ernst and Young, Global LT, K2, International Relocations Management, NOS Relocations, NOVA Relocation, Odyssey Relocation Management, SECOR Group, Settwel Relocation, Sterling, Suddath, TM Relocation Services, TransferEase, TRC Global Solutions, Zurich Relocation.

**Removals and Household Goods
Market Share**



Crown World Mobility has market share of 13%, Cartus has a market share of 10%, Brookfield and Weichert has a market share of 7%, and Interdean/ Santa Fe follow with 6%. Graebel Relocation have 5% market share and TheMIGroup, Team Allied and SIRVA all have 4% each. The rest of the firms make up the remaining 39%

Thus, the market for Household Goods Services is shared by a lot of service providers unlike the tax market where the majority 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.

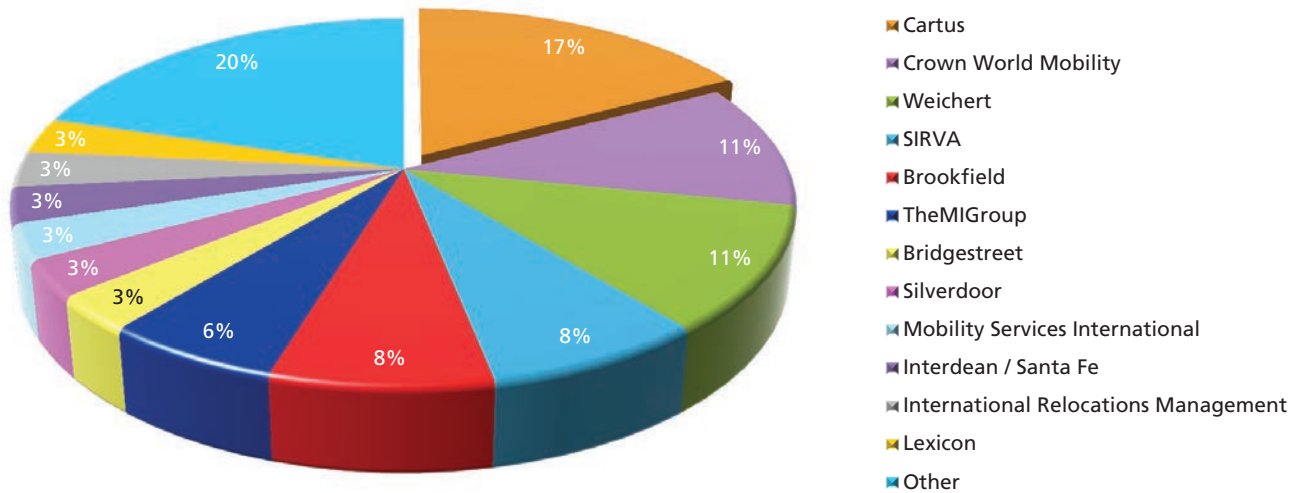
Top 5 Service Providers by Market Share

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

Other companies that our respondents use are:

Aires, Alfa, Altair, Armstrong International Movers, Arpin, Asian Tiger, Atlantic, Chamption International, Daryl Flood, GB Liners, Gropiron, International Relocations Management, John Mason International Movers, K2, Kent and Wridgeways, Kings Transfer, Lexicon, Mobiltransport, Mobility Services International, Move one, Nelson Westerberg, New World Van Lines, North American Van Lines, NOVA, Odyssey Relocation, Packimpex, Paramount, Pickfords, Prudential, Secor Group, Settelen, Sterling, Suddath, TRC Global Solutions, TWW, Unigroup, Unimove, United Relocation Group, United Van Lines, Voerman, Zurich Relocation

**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.

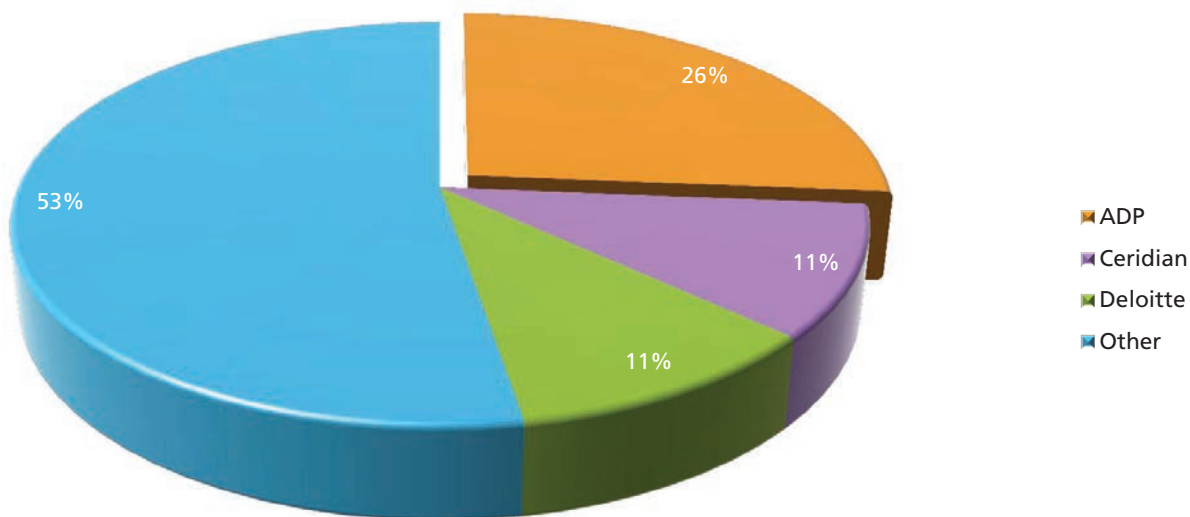
The largest market share was Cartus with 17%, Crown Mobility and Weichert had 11% market share each, and SIRVA and Brookfield had 8% market share each. TheMIGroup had 6% market share. Bridgestreet,

Silverdoor, Mobility Services International, Interdean/ Santa Fe, International Relocations Management, Lexicon all have 3% market share.

Other companies that our respondents use are:

AIReS, Altair, Fraser and Somerset, Go Native, K2, Movenpick Hotel, Nino's Executive Quarters, NOVA, Oakwood, Sterling, Suite America, TransferEase, TRC Global Solutions

**Payroll
Market Share**

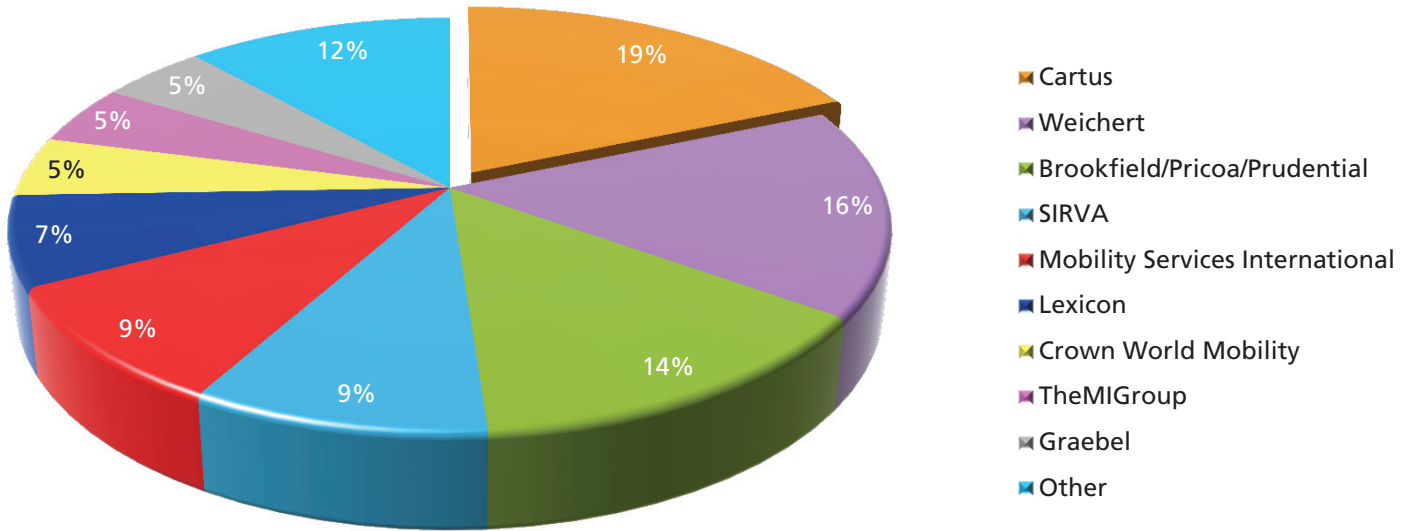


There were some clear market leaders when it came to payroll service providers. ADP had over a quarter of the market share followed by Ceridian and Deloitte with 11% each.

Other companies that our respondents use are:

BDO, Ernst and Young, Mazars, MFR, Paychex, PricewaterhouseCoopers, SIRVA, Swain Payroll Services, Talent2 and Xchanging

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.

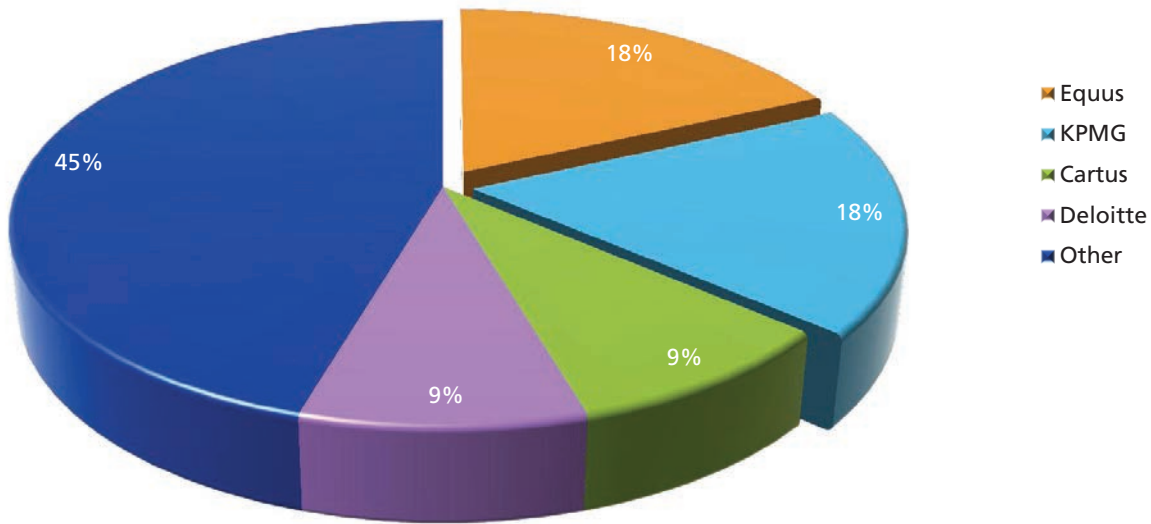
Cartus have the largest market share with 19%, Weichert have 16% market share, and Brookfield have 14%. SIRVA and Mobility Services International have 9% market share each. Lexicon have 7% market share while Crown World Mobility, TheMIGroup and Graebel all have 5% market share each.

Top 5 Service Providers by Market Share

1	Cartus
2	Weichert
3	Brookfield
4	SIRVA Mobility Services International
5	Lexicon

Other companies that our respondents use are:
AECC, AIReS, Altair, Polaris, and Team Relocation

**Technology
Market Share**



With a total of 18% of the market share each, Equus and KPMG are market leaders for Technology. Cartus and Deloitte both have 9% of the markets share.

Brookfield, Ernst and Young, Expat Tracker, Graebel, Lexicon, Mercer, Mobility Services International, Polaris, PwC have a combined market share of 45%.

7. Vendor Management

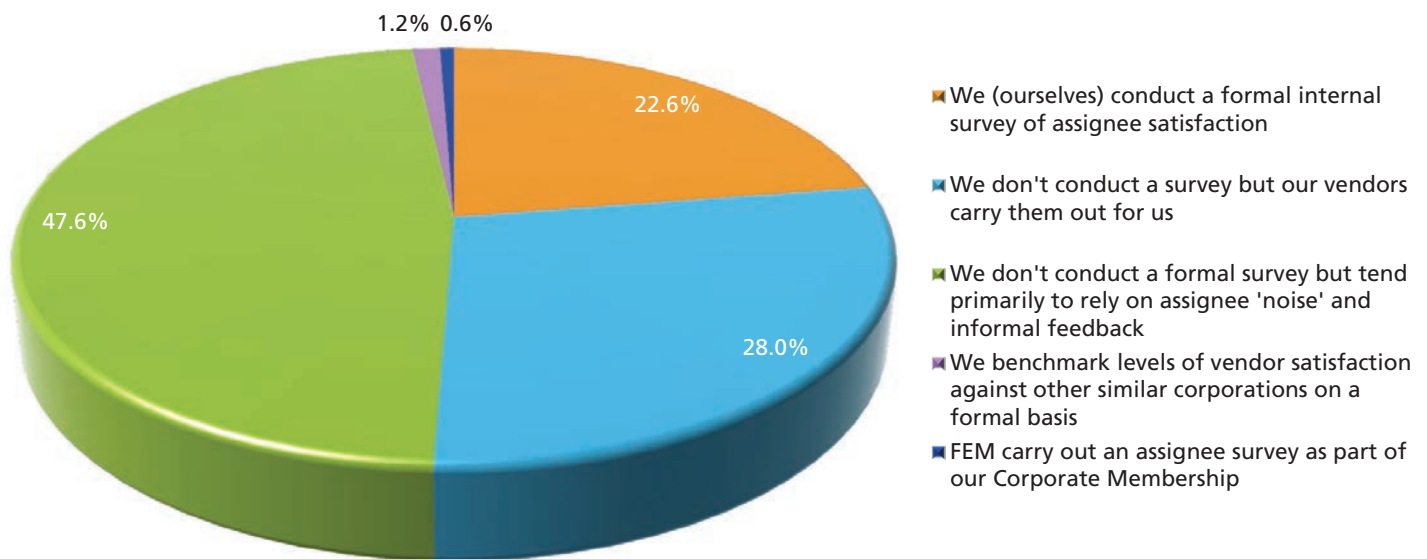
Vendor Management is one of the key challenges facing any global mobility professional (both corporate and service provider). This section analyzes the way in which companies manage their service providers. We also report our findings on how vendors are perceived against industry standards.

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 130 service providers. A full list of service providers mentioned by respondents is included in Appendix B.

General Overview

How do companies monitor vendor performance?



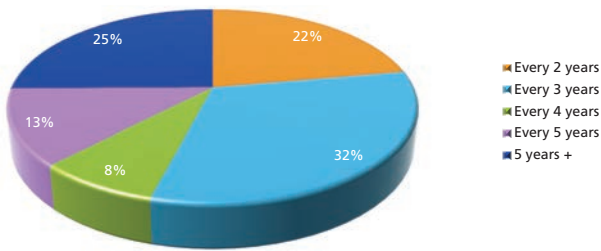
When asked how the firms managed their vendor performance, the highest share (47.6%) of respondents said they did not conduct a formal survey but tended to rely on assignee 'noise' and informal feedback. This is up from 41.8% from last year. 28.0% reported that their vendors conducted a survey for them. This is down 3.1% from last year.

22.6% said they conduct a formal internal survey of assignee satisfaction. This is down 2.8% from last year. Only 1.2% said they formally benchmarked levels of vendor satisfaction against other similar corporations. This is down 0.5%. 0.6% of the survey respondents have FEM carry out an assignee survey as part of their Corporate Membership



Interesting fact:

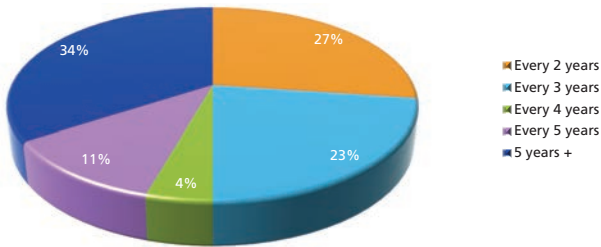
Nearly half of organizations rely solely on informal feedback from their assignees and have no formal procedure in place to keep a tab on the service standards of their vendors



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.

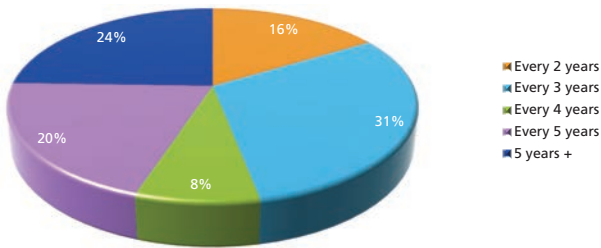
How often do you go out for RFP to the Tax service providers?

The most common response among the respondents (43.9%) was to go out to formal RFP for major vendors every 3 years.



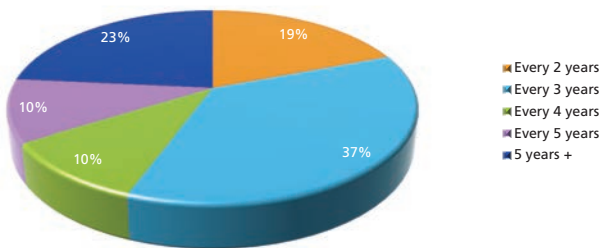
How often do you go out for RFP to the Immigration service providers?

For immigration service providers, over a third of our respondents go out to RFP every 5 or more years although over a quarter go out to RFP every 2 years.



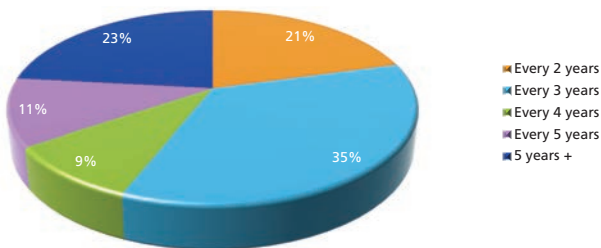
How often do you go out for RFP to the Assignment and Vendor Management service providers?

Almost a third of our respondents go out for RFP to the Assignment and Vendor Management Service Providers every 3 years.



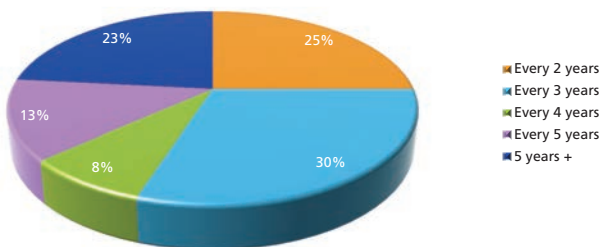
How often do you go out for RFP to the Relocation/Destination services providers?

37% of the survey respondents go out for RFP to the Relocation/Destination service providers every 3 years.



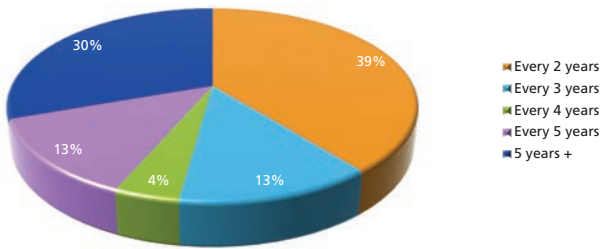
How often do you go out for RFP to the Removals and Household Goods service providers?

35% of the survey respondents go out for RFP to the Removals and Household Goods service providers every 3 years. 23% leave it over 5 years and 21% go out for RFP every 2 years.



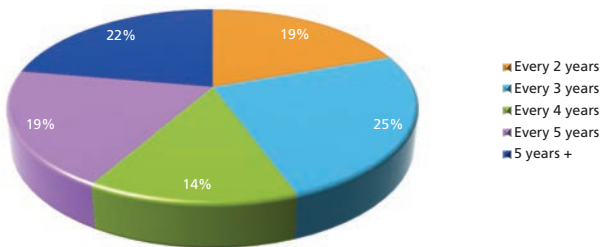
How often do you go out for RFP to the Serviced Accommodation service providers?

30% of the survey respondents go out for RFP to the Service Accommodation service providers every 3 years. 23% leave it over 5 years and a quarter go out for RFP every 2 years.



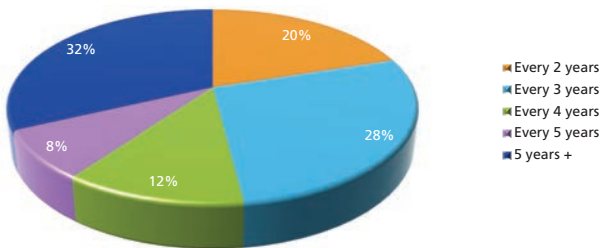
How often do you go out for RFP to the Payroll service providers?

39% of the survey respondents go out for RFP to the Payroll service providers every 3 years. 23% leave it over 5 years and a quarter go out for RFP every 2 years.



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

A quarter of the survey respondents go out for RFP to the Expense Management service providers every 3 years. 22% leave it over 5 years, 19% go out for RFP every 2 years and another 19% go out for RFP every 5 years.



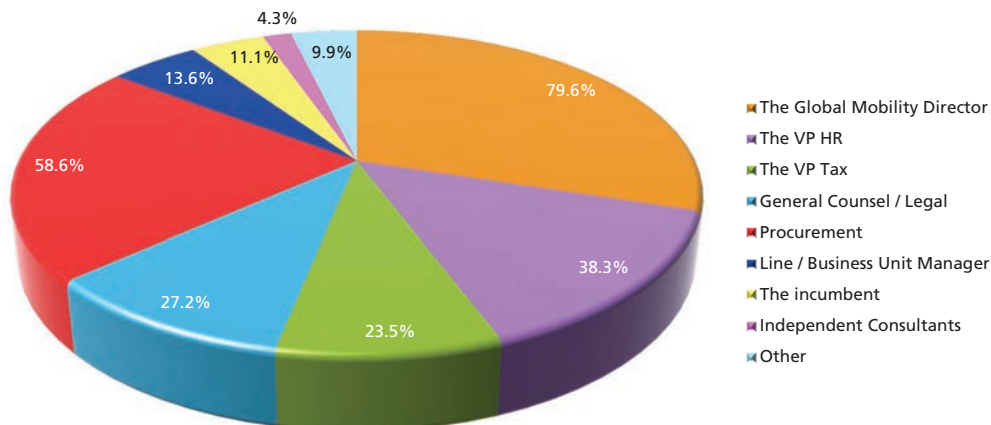
How often do you go out for RFP to the technology providers?

32% of the survey respondents go out for RFP to the Technology service providers every 3 years. This is unsurprising given the effort involved in changing from one system to another and retraining the team. 28% go out for RFP every 3 years.

Interesting fact: Surprisingly almost at least 22% of respondents have not been for RFP for 5 years or more. The majority of respondents (65%) go out for RFP between every 2 to 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.

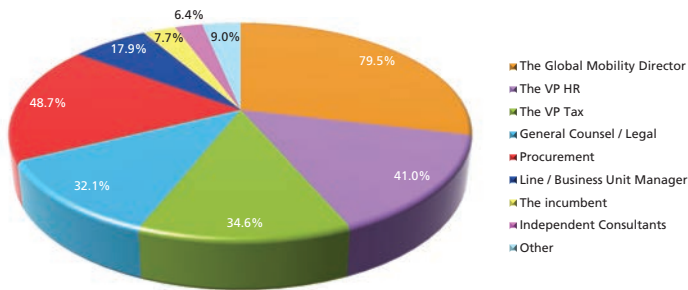
People significantly involved in the RFP process



Detailed Analysis

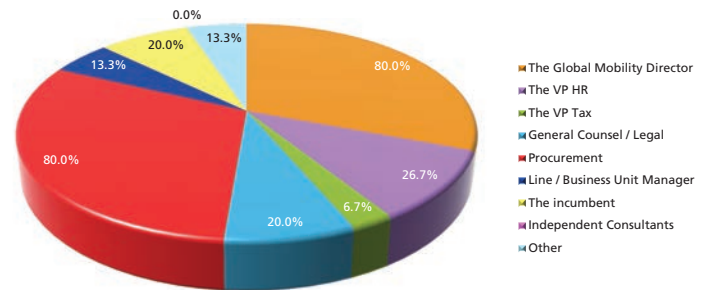
Program size does influence the involvement of particular people in the process as can be seen from the data below.

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 79.5%), Procurement (48.7%) and VP HR (41%). The least involved people in the process were independent Consultants. The level of involvement is very similar to last year. Just under 18% of the participants reported Line and Business Unit Managers to be significantly involved in the process of going out to RFP for major vendors.

Large Programs



For large programs the most significantly involved people in the process, were the Global Mobility Directors and Procurement (80.0% respectively).

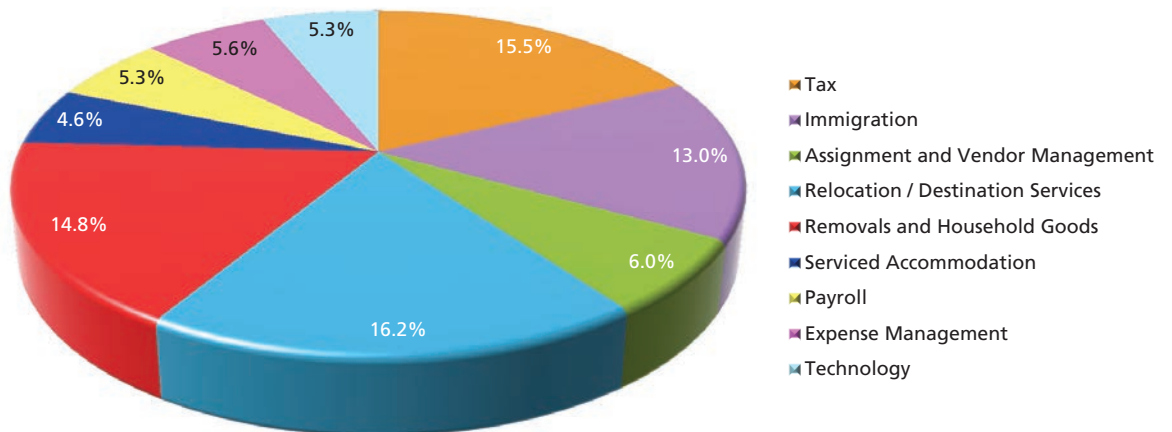
However, the VP HR seemed to play a far less important role in the process with only 26.7% being involved (in comparison to 41% in small programs).

Also, 20% of the respondents indicated that General Counsel/Legal department was significantly involved in the process – more VP Tax.

Once again 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



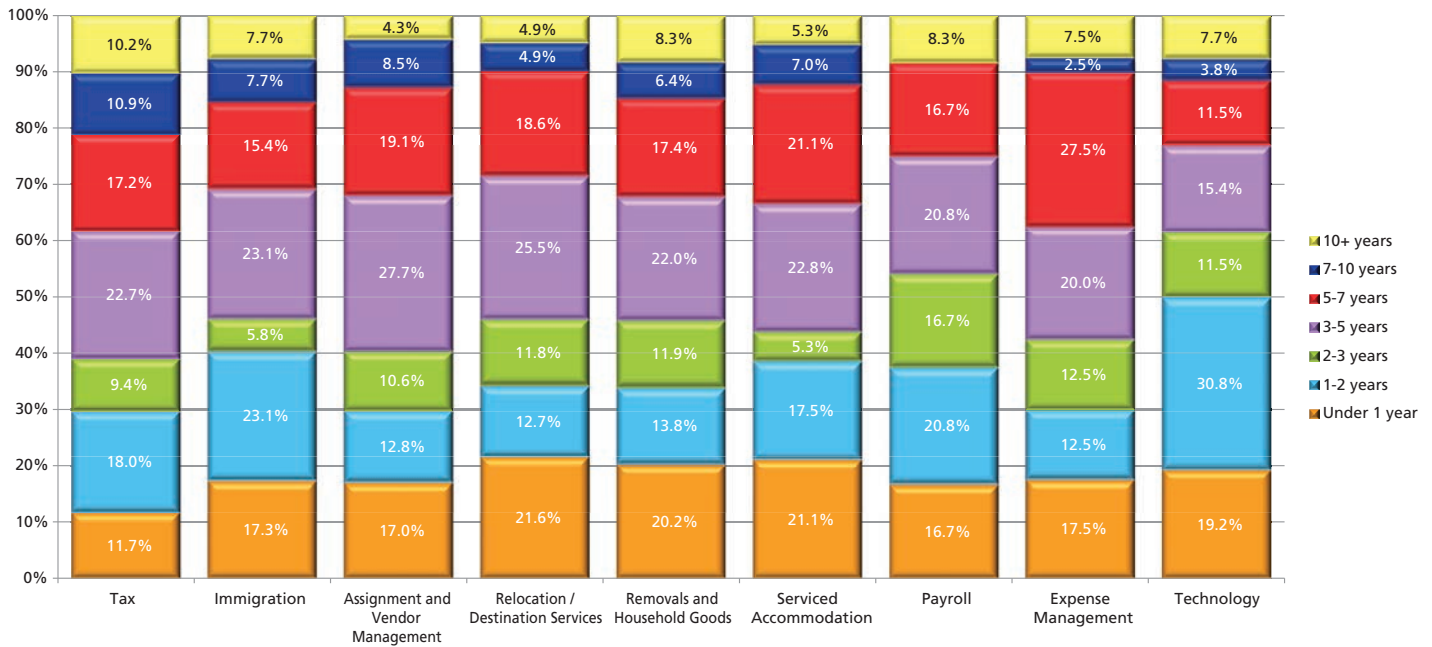
16.2% of the respondents said that they would be going out for RFP to the Relocation/Destination Services, 15.5% to the tax service providers, 14.8% to the Removals and Household Goods service providers and 13% to the Immigration service providers.

6% or less of the respondents are going out for RFP to the Assignment and Vendor Management, Serviced Accommodation, Payroll, Expense Management and Technology service providers.

The study also investigated how long ago the respondents last changed their major service provider in nine different categories: Tax, Immigration, Assignment and Vendor Management, Relocation/

Destination Services, Removals and Household Goods, Serviced Accommodation, Payroll, 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 more than 10 years.

The median period of contract longevity is as follows:

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 Tax service providers are less often changed by organizations when compared to the other service providers.

Tax	3-5 years
Immigration	3-5 years
Assignment and Vendor Management	3-5 years
Relocation/Destination Services	3-5 years
Removals and Household Goods	3-5 years
Serviced Accommodation	3-5 years
Payroll	2-3 years
Expense Management	3-5 years
Technology	2-3 years

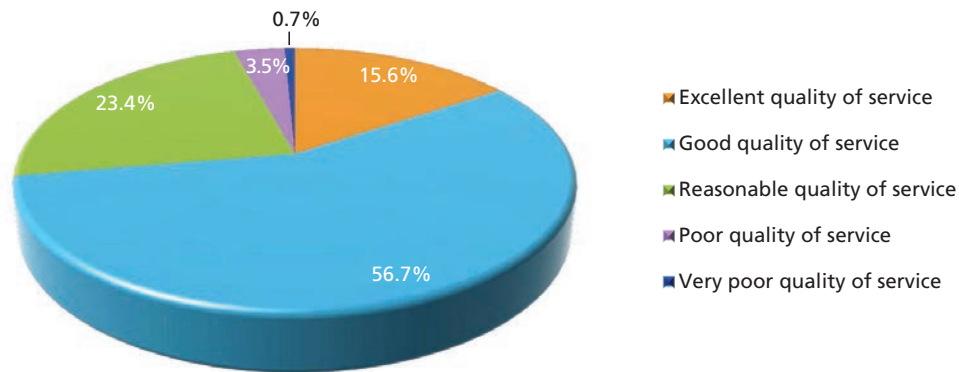
The highest percentage of companies who tend to stick to a major service provider (defined as over every 10 years) was found in the Tax category (10.2%), followed by Removals/Household Goods and Payroll. (both 8.3%).

Interesting fact:
 Companies tend to switch their major service provider more often for Relocation/Destination Services and Serviced Accommodation 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 56.7% of the respondents. 23.4% thought service was reasonable and 15.6% thought they received an excellent quality of service. Just over 4% thought service was either poor or very poor.

For large programs, 9% of respondents thought that their tax vendors have provided excellent service quality. 72% thought that their tax providers delivered

a good quality of service and the remainder felt the service level was reasonable.

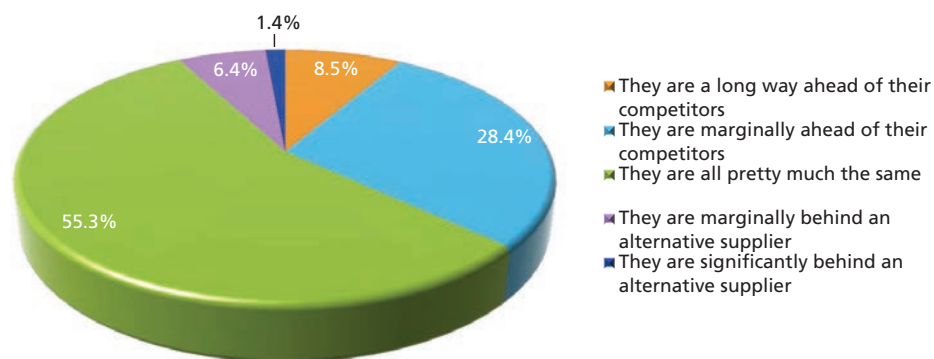
For small programs a total of 17.8% of the respondents rated the service from their Tax providers as excellent, 50.6% of respondents felt they received a good quality of service. Over a quarter of the survey participants thought that the quality of service from their tax providers was reasonable. Only 5.5% thought it was poor.



Interesting fact:

Respondents with large programs were more satisfied with their tax vendors in terms of their service quality than those 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 (55.3%). A total of 28.4% felt their service provider was slightly ahead of its competitors and 8.5% thought their service provider was a long way ahead. 6.4% thought their vendor was lagging slightly behind an alternative supplier and 1.4% thought their tax vendor was significantly behind an alternative supplier.

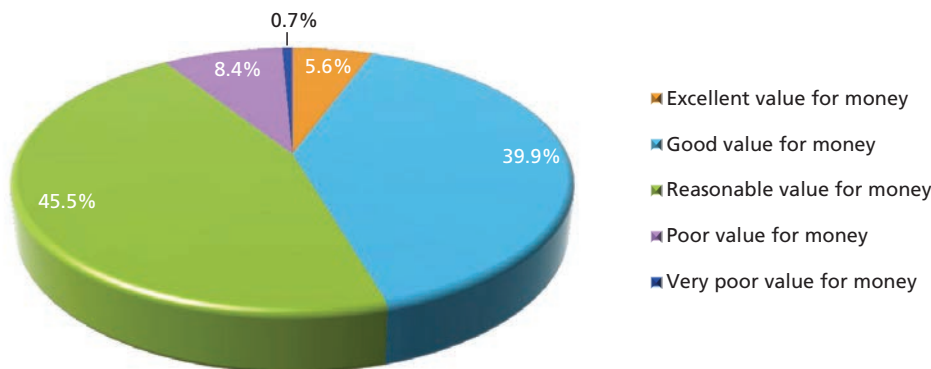
An in-depth analysis shows that for large programs a clear majority (55%) of the respondents felt that all the tax service providers were pretty much the same. The remainder felt their service provider was marginally ahead of their competitors.

For small programs, most of survey participants (57%) thought their tax service providers were all pretty much the same and 12% thought their vendors were along way ahead of their competitors.

22% of the respondents thought their tax providers were marginally ahead of their competitors and 10% believed their vendors were marginally behind their competitors.

Interesting fact:
Survey participants with large programs have a stronger belief in the competence and professionalism of their tax vendors than respondents with small programs. This was the same as last year

Value for Money



A significant proportion of respondents (39.9%) believed their tax providers gave them good value for money. 5.6% believed they received excellent value for money. 45.5% believed they received reasonable value for money whilst 9.1% believed they received poor or very poor value for money.

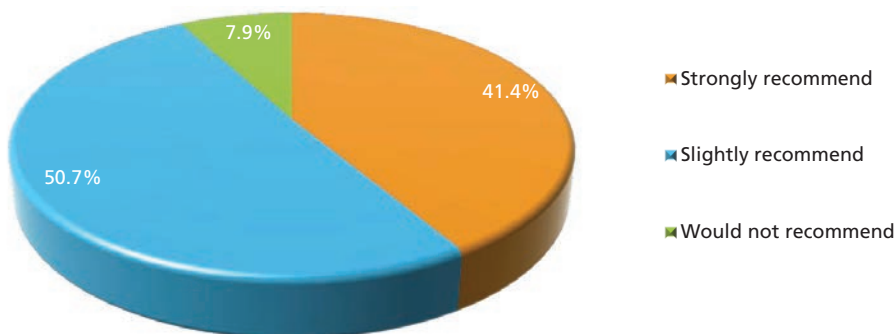
the service they received from their Tax providers was either good or excellent value for money, whilst the remainder believed that they received reasonable value for money.

A detailed analysis showed that for large programs, a total of 54.5% of the respondents believed that

For small programs, a lower proportion of the respondents believed that they received good or excellent value for money from their Tax providers (47.2%).

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.

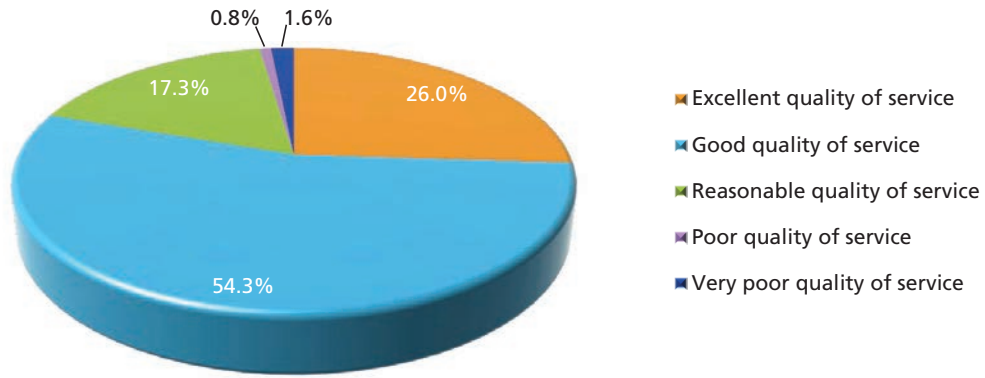
Recommendation



50.7% of the organizations said that they would only slightly recommend their service providers in the field of tax, while 41.4% of them said they would strongly recommend them and only 7.9% said they would not recommend them to others.

IMMIGRATION

Quality of Service



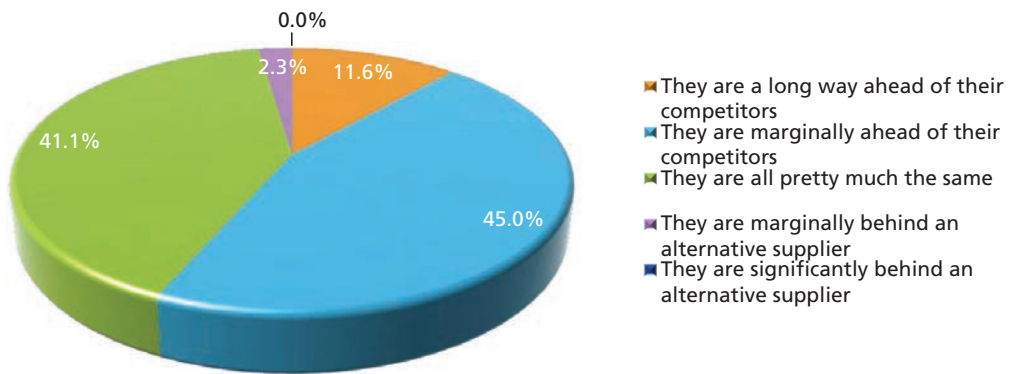
In regards to service quality, over 80% of respondents thought their immigration service providers delivered good or excellent service quality. 17.3% felt they received a reasonable quality of service. Only 2.4% of the survey participants thought they received poor or very poor service quality.

For large programs, slightly more than half of the respondents believed that the service received from their vendors in the area of Immigration was good (55.5%), and the remainder thought that the quality of service was reasonable.

For small programs, a minority of respondents (4.6%) rated the service quality as poor or very poor, 15.4% thought the service was reasonable and the remainder thought the client service quality was either good or excellent.

It is clear that the respondents most satisfied with their Immigration vendors belonged to small programs as they report the highest level of satisfaction.

Technical Competence and Professionalism

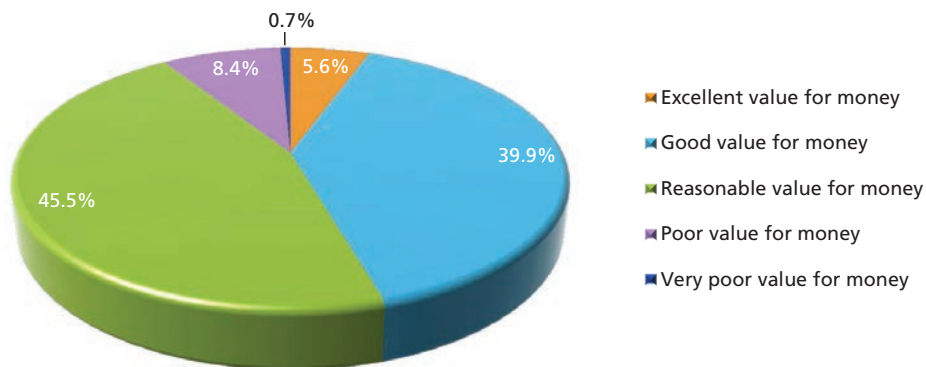


Respondents were also asked to rate their immigration vendors in areas of technical competence and professionalism. Overall results show that 41.1% said that all the immigration service providers were pretty much the same, 11.6% said that their service providers were a long way ahead of their competitors, 45% said that they believed their vendors to be marginally ahead of their competitors and 2.3% said they felt their service providers were marginally behind an alternative supplier.

A detailed analysis showed that for large programs, the proportion of respondents saying that their service providers were just the same as others in the business was 44% whereas the remainder felt that their service providers were marginally ahead of their competitors.

As for small programs a majority (47.6%) of the respondents thought that their service providers were marginally ahead of their competitors. 9.2% felt that their vendor was a long way ahead of their competitors. 40% believed they were just the same as their competitors. Only 3% felt their service provider was marginally behind an alternative supplier.

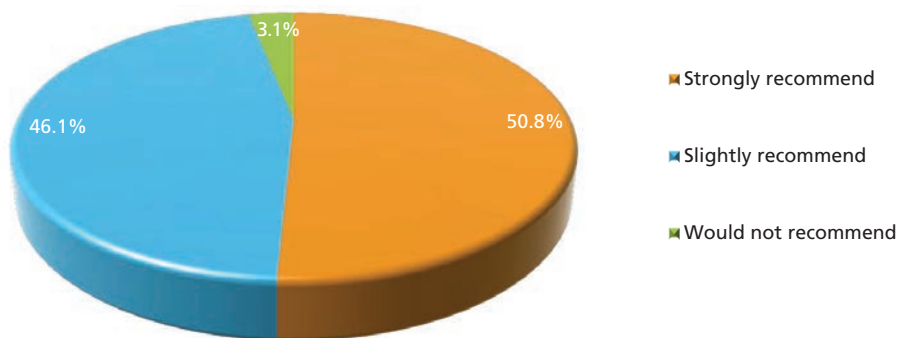
Value for Money



The majority of respondents (52%) believed that they received good value for money from their Immigration service providers. 34.6% thought the value for money was reasonable. 10.2% thought it was excellent value for money and only 3.1% thought they received poor value for money.

After an in-depth analysis between large and small programs it was noted that respondents with large programs thought they received good value for money (55.5%) whereas 59.4% of respondents with small programs believed they received good or excellent value for money.

Recommendation

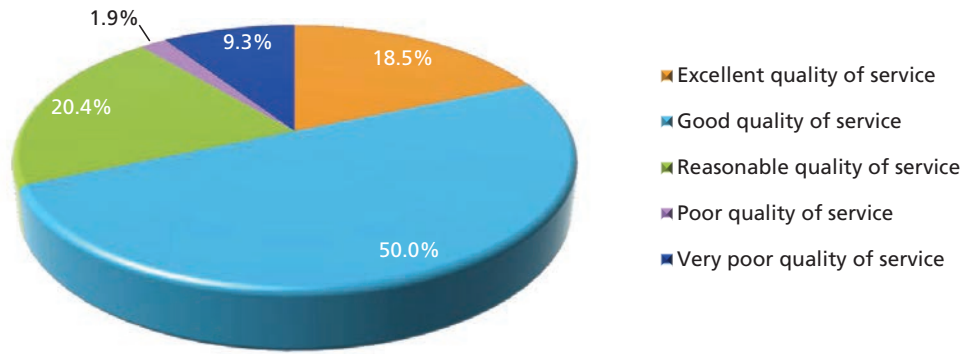


A total of 50.8% of the service providers in the field of immigration were likely to be strongly recommended by the respondents, 46.1% of them are likely to be slightly recommended and only 3.1% of them would not be recommended to others.

Interesting fact:
 Immigration is the area where respondents are most likely to recommend their service provider

ASSIGNMENT AND VENDOR MANAGEMENT

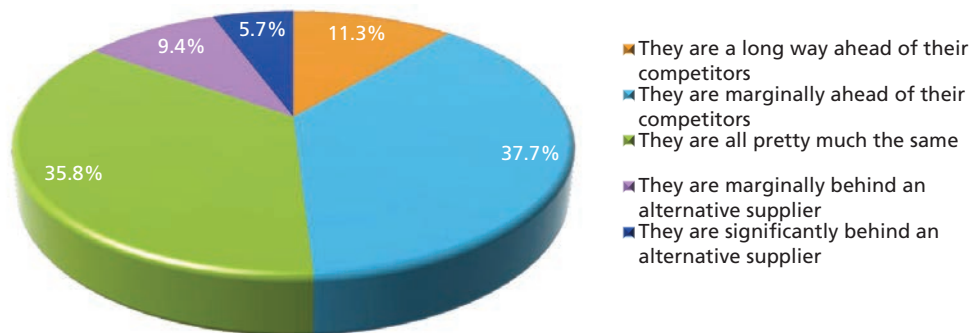
Quality of Service



Half of the respondents believed that they received good value for money from their Assignment and Vendor Management service provider. 20.4% thought the value for money was reasonable. 18.5% thought it was excellent value for money. 11.2% felt they received either a poor or very poor quality of service.

On the whole large organizations felt they received a better quality of service than smaller organizations. Almost 10% of small organizations felt the quality of service was very poor.

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 37.7% of the respondents felt that their service providers were marginally ahead of their competitors. 35.8% said that all the assignment and vendor management service providers were pretty much the same. 11.3% said that their service providers were a long way ahead of their competitors. 9.4% said their service provider was marginally behind an alternative supplier and 5.7% felt their service provider was significantly behind an alternative supplier.

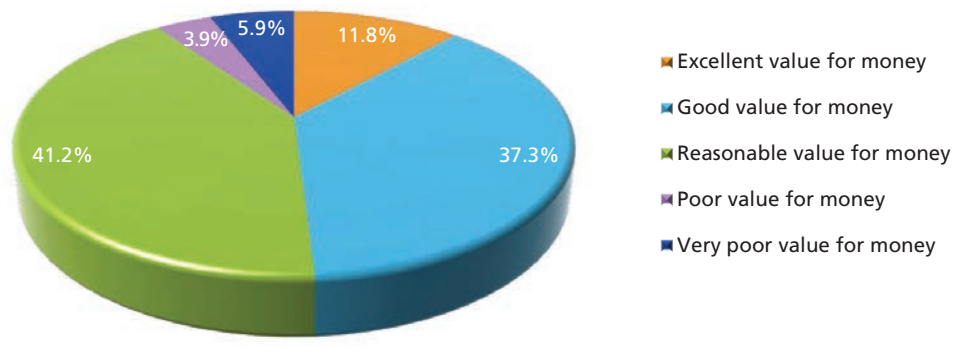
A detailed analysis showed that for small programs over a third of the respondents thought that their

service providers were marginally ahead of their competitors. 9.3% felt that their vendor was a long way ahead of their competitors. 37.5% believed they were just the same as their competitors. 12.5% felt their service provider was marginally behind an alternative supplier and 6.3% felt their service provider was significantly behind an alternative supplier.

As for large programs, a third of respondents stated that they felt their service providers were all pretty much the same, whereas the remainder felt that their service providers were marginally ahead of their competitors. Once again showing that larger programs feel they are getting a better level of service.



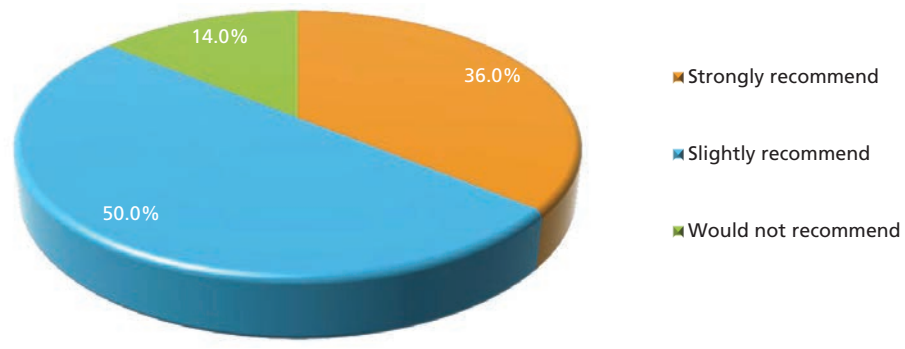
Value for Money



41.2% of respondents believed that they received reasonable value for money from their assignment and vendor management service providers. 37.3% thought the value for money was good. 11.8% thought they received excellent value for money and only 9.8% thought they received poor or very poor value for money.

After an in-depth analysis between large and small programs it was noted that respondents with large programs thought they received good value for money whereas only 48.4% of respondents with small programs believed they received good or excellent value for money.

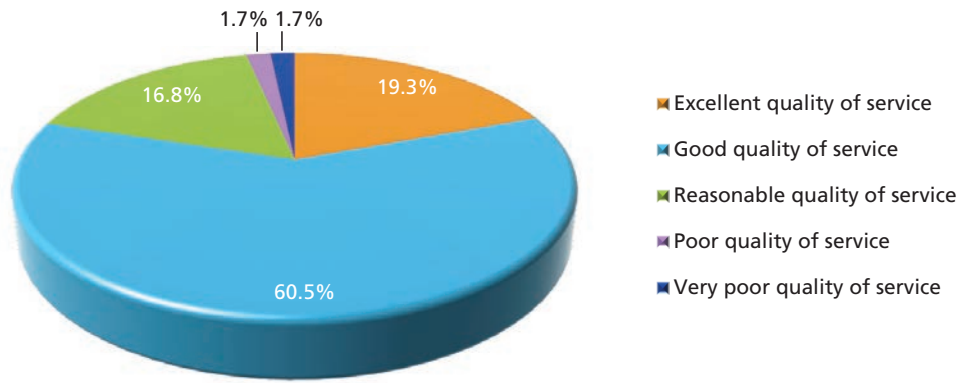
Recommendation



Half of the assignment and vendor management service providers were likely to be slightly recommended by the respondents, 36% of them would be strongly recommended and 14% of them would not be recommended to others.

RELOCATION/DESTINATION SERVICES

Quality of Service



In terms of service quality, 60.5% of respondents believed their service providers in the area of relocation/destination services provided a good quality of client service, 19.3% thought service quality was excellent and 16.8% thought the service quality was reasonable. Only 3.4% thought the quality of service they received was poor or very poor.

For large programs, it was revealed that 77.7% thought the quality of service was good. The remainder felt the quality of the service was reasonable.

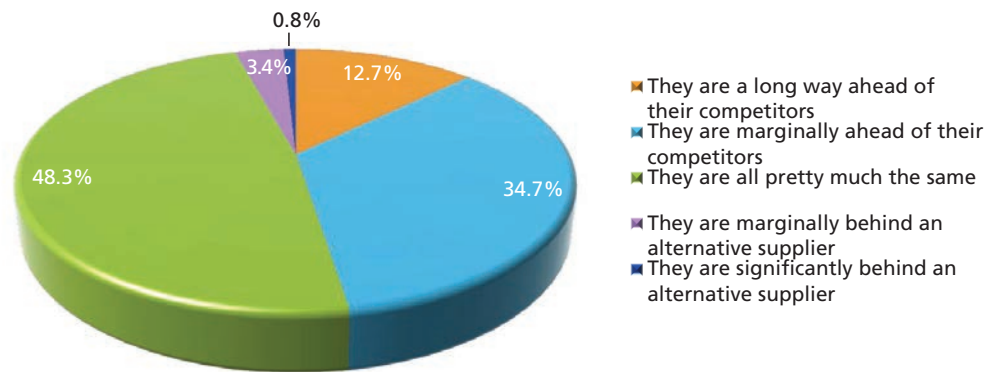
For small programs, a total of 23.7% of the survey respondents rated their relocation/destination services provider as excellent and 52.5% thought they provided a good quality of service. 18.6% thought the service quality was reasonable. Only 5.1% felt their relocation/destination service provider provided a poor or very poor quality service.



Interesting fact:

Clients with large programs are more likely to be satisfied with levels of client service than small programs.

Technical Competence and Professionalism



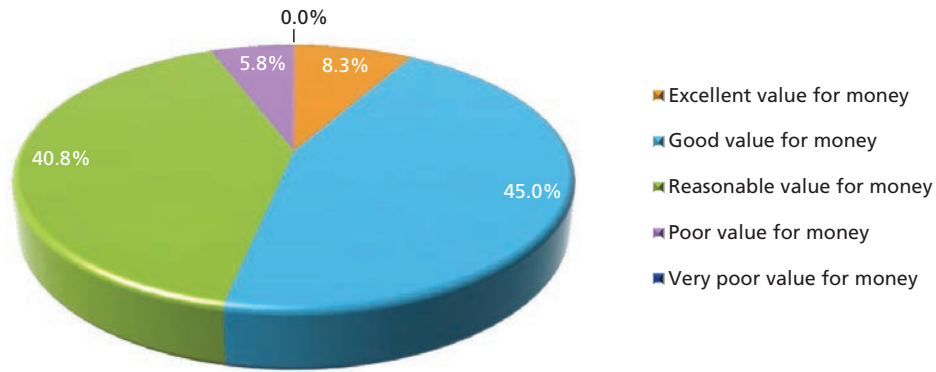
When questioned about the level of competence and professionalism of their service providers, in the area of relocation/destination services, 48.3% of respondents said all the service providers are pretty much the same, 34.7% said their service provider is marginally ahead of its competitors and 12.7% thought they were a long way ahead. 3.4% of the respondents believed their service provider is marginally behind its competitors. A small proportion of respondents (0.8%) 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 60%. 40% thought their vendors were pretty much the same.

For small programs, a majority of respondents thought their service providers are pretty much the same (55.4%), 26.8% thought that their service provider was marginally ahead of its competitors and 12.5% reported their vendors were a long way ahead of their competitors. 5.4% believed their service provider was marginally behind its competitors.



Value for Money

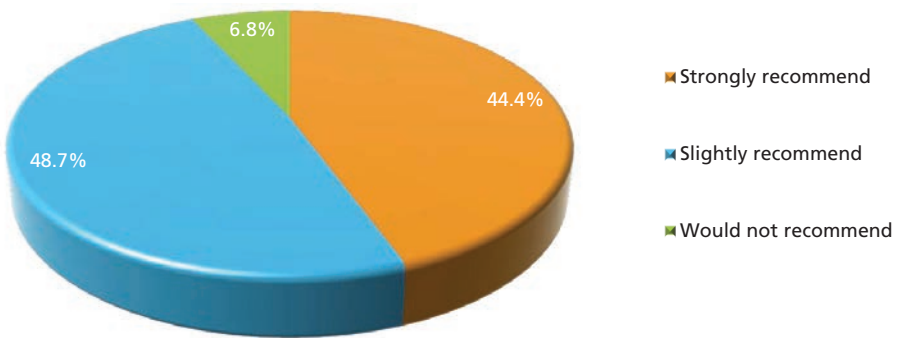


An overall evaluation of the results show that 45% of the respondents believed they received good value for money.

A detailed analysis shows that for large programs respondents rated their service providers for relocation/destination services quite favorably. Around 63.6% of the respondents believed that they received good value for money from their relocation/destination service

providers whilst the rest of the respondents thought they received reasonable value for money. Findings from respondents with small programs showed 50.9% believed they were getting good or excellent value for money while 42.1% felt the service was reasonable. Only 7% felt they received poor value for money.

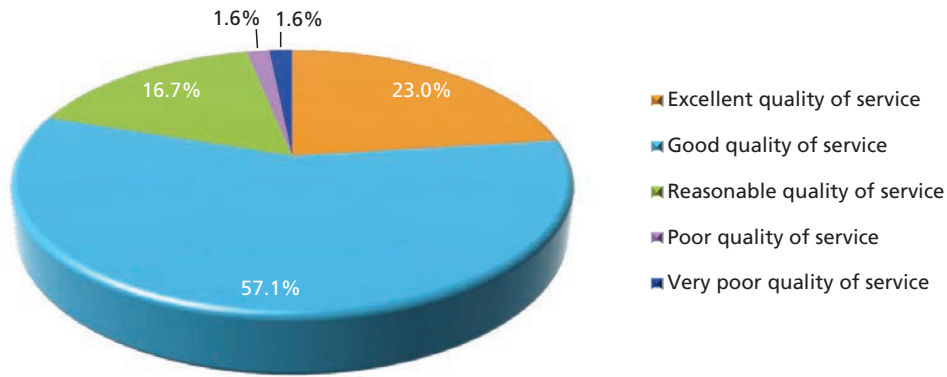
Recommendation



48.7% of the respondents said they would slightly recommend their relocation/destination services provider, 44.4% said they would strongly recommend them and only 6.8% said they would not recommend them to others.

REMOVALS AND HOUSEHOLD GOODS

Quality of Service



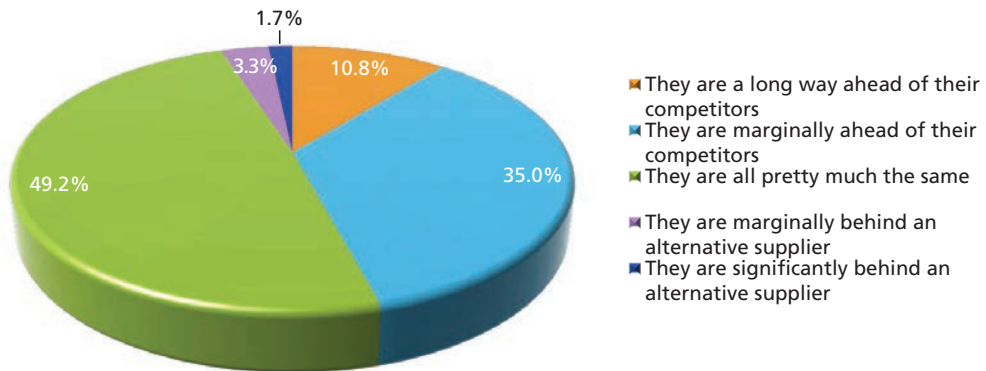
In terms of overall service quality in this field – 57.1% of respondents felt they received a good quality of service, while 23% believed that their removals and household goods service provider provided an excellent quality of client service. Only 3.2% believed they received a poor or very poor quality of client service.

For small programs the proportion of respondents who believed they received an excellent quality of

service was 26.7%, over half felt they received a good quality of service. 16.7% felt the quality of service was reasonable. Only 5% expressed dissatisfaction at the quality of service.

For large programs, results were quite different with 90.9% believing they received a good quality of client service and the remainder felt the quality of client service was reasonable.

Technical Competence and Professionalism

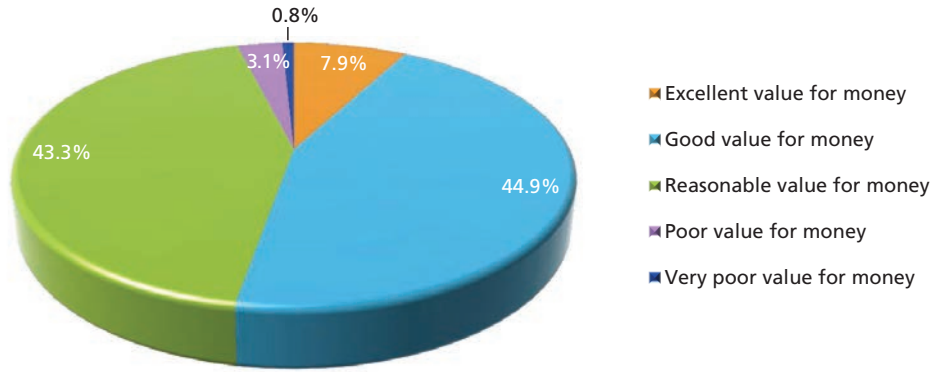


When questioned about the level of competence and professionalism from their service providers, 49.2% of all respondents said all the service providers in that industry are pretty much the same. Only 10.8% expressed the view that their principal service provider is a long way ahead of their competitors. 35% felt that their service providers were marginally ahead of their competitors. Only 5% claimed that their service provider was marginally or significantly 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. Around 44% of the respondents believed their service providers were either marginally or streets ahead of their competitors.

As for large programs a majority of respondents (54.5%) said that all the service providers in the industry were pretty much the same. The remainder thought their service providers was marginally ahead of an alternative supplier.

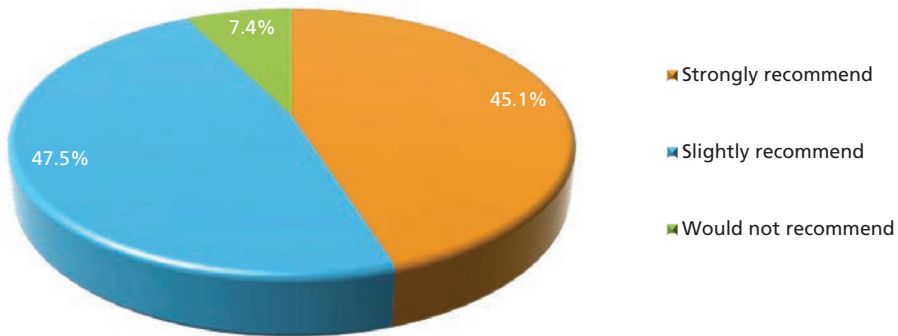
Value for Money



Investigation of the data showed that 44.9% of respondents believed they received good value for money and 43.3% felt it was reasonable. Only 7.9% believed they received excellent value for money. Less than 4% thought they received poor or very poor value for money.

Similar proportions regarding value for money for the services provided were found for both small and large programs apart from 4.9% of respondents with small programs who felt they received poor or very poor value for money.

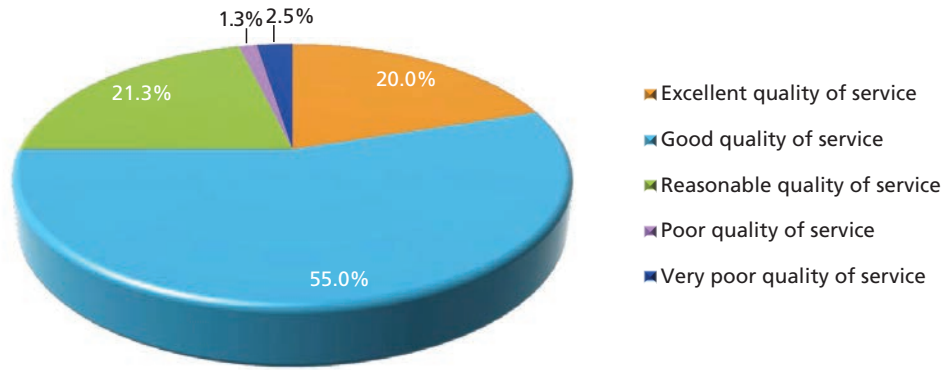
Recommendation



For removals and household goods, 45.1% of the respondents said they would strongly recommend their service providers, 47.5% said they would slightly recommend them to others and only 7.4% said they would not recommend them at all.

SERVICED ACCOMMODATION

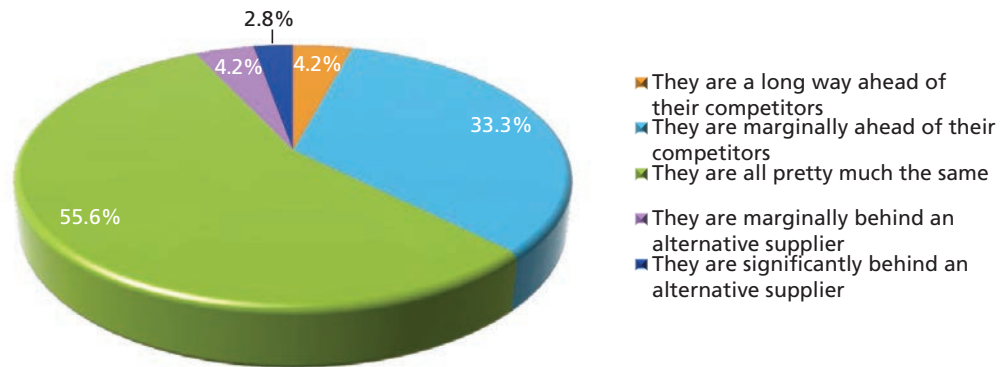
Quality of Service



Results show that Serviced Accommodation providers are generally perceived as providing excellent or good quality of client service. 21.3% felt they received a reasonable quality of service and less than 4% felt the service quality was poor or very poor.

Similar proportions regarding value for money for the services provided were found for both small and large programs although none of the large programs expressed dissatisfaction with the quality of service.

Technical Competence and Professionalism



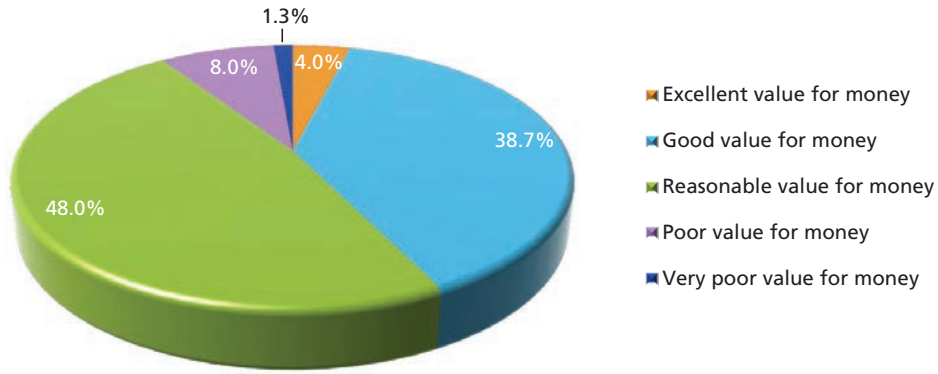
In terms of competence and professionalism, 55.6% thought that their serviced accommodation provider was pretty much the same as its competitors. A third thought their service provider was marginally ahead of its competitors. 4.2% thought their service provider provided an excellent level of technical competence and professionalism but 7% thought their service provider was marginally or significantly behind an alternative supplier.

thought that their vendors were marginally behind an alternative supplier and 2.9% of respondents believed that their suppliers were significantly behind an alternative supplier.

For small program only 2.9% claimed that their service providers were a long way ahead of their competitors. 35.3% felt their service provider was marginally ahead of their competitors. 52.9% thought that they are all pretty much the same. 5.9% of respondents

Interestingly, some striking results were found for organizations with over 1000 assignees (large programs). None of the respondents thought that their suppliers were streets ahead of their competitors. Also, no one believed their vendors were significantly behind an alternative supplier. All the responses were divided between those who claimed that suppliers are all pretty much the same (60%) and those who were marginally ahead of their competitors (40%).

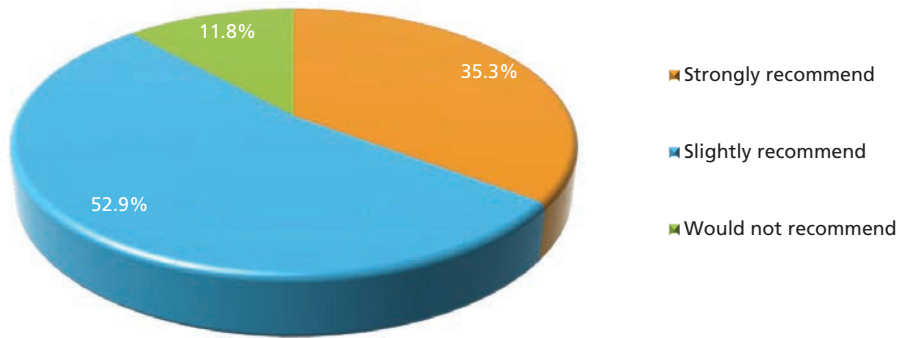
Value for Money



For Serviced Accommodation, almost half of the respondents believed that they received reasonable value for money. 38.7% thought they received good value for money and 4.0% thought they received excellent value for money. Less than 10% of respondents were dissatisfied with their service providers for Serviced Accommodation.

For large programs, a third of the respondents thought they received good value for money and the rest felt it was reasonable whilst for small programs, over 44% of the survey participants thought they received good or excellent value for money another 44% felt it was reasonable.

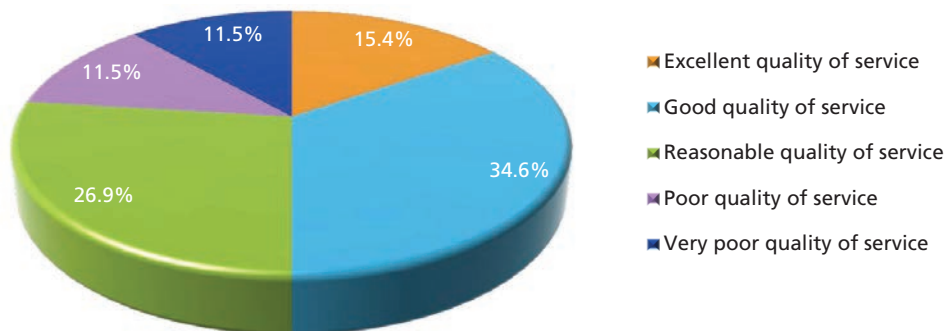
Recommendation



For serviced accommodation, 52.9% of the respondents stated they would only slightly recommend their service providers, 35.3% of them said they would strongly recommend them and only 11.8% said they would not recommend their serviced accommodation provider to others.

PAYROLL

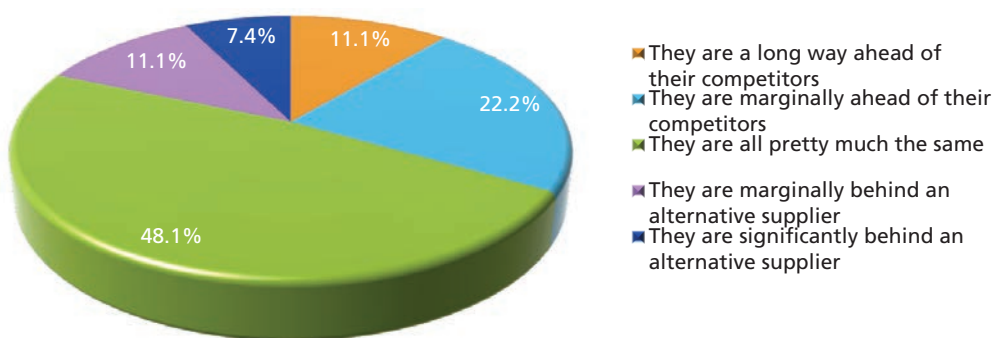
Quality of Service



Results show that payroll service providers are perceived by half the respondents as providing excellent or good quality of client service. 26.9% felt they received a reasonable quality of service but 23% felt they received a poor or very poor quality of service.

36.3% of small programs found the quality of service to be good or excellent, and the same number found it to be reasonable. 27.3% found the service quality to be poor or very poor. Whereas organizations with large programs felt they received a good quality of service.

Technical Competence and Professionalism



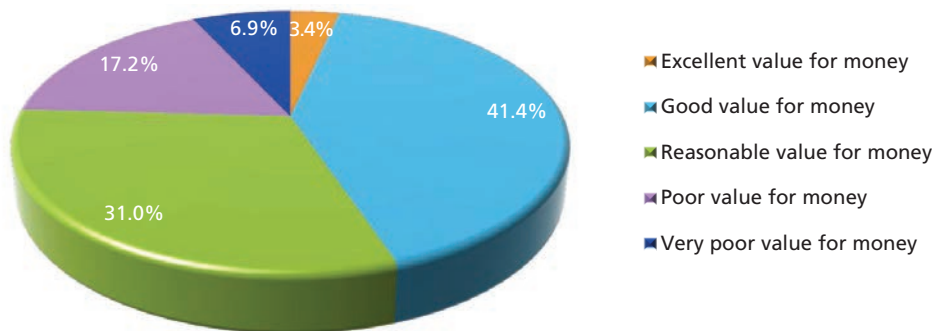
In terms of competence and professionalism, 48.1% thought that their payroll service provider was pretty much the same as its competitors. 22.2% thought their service provider was marginally ahead of its competitors. 11.1% thought their service provider provided an excellent level of technical competence and professionalism but 18.5% thought their service provider was marginally or significantly behind an alternative supplier.

For small programs 15.4% claimed that their service providers were a long way ahead of their competitors. 7.8% felt their service provider was marginally ahead of its competitors. Over half thought that they are all pretty much the same. 7.8% of respondents

thought that their vendors were marginally behind an alternative supplier and 15.4% 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.

Interestingly, for organizations with large programs, none of the respondents thought that their suppliers were streets ahead of their competitors. Also, no one believed their vendors were significantly behind an alternative supplier. All the respondents felt their provider was marginally ahead of their competitors. Once again we can see the larger programs feel that they receive a better level of service.

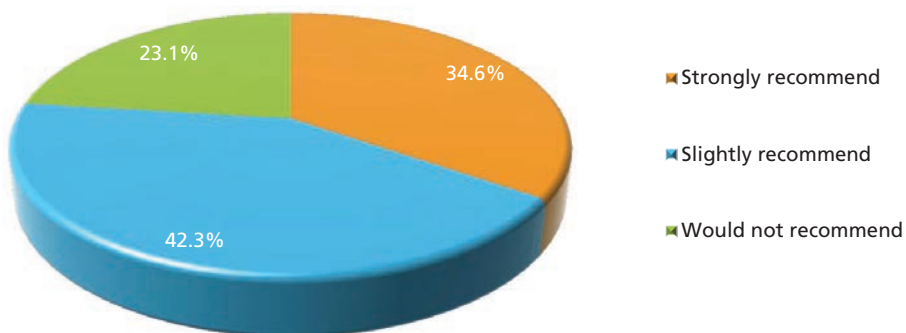
Value for Money



For payroll service providers, 41.4% of the respondents believed that they received good value for money. 31% thought they received reasonable value for money and 3.4% thought they received excellent value for money. Nearly a quarter felt they received poor or very poor value for money.

For large programs, the respondents thought they received good value for money whilst for small programs, 40% of the survey participants thought they received good value for money another 26.7% felt it was reasonable and the remainder felt it was poor or very poor.

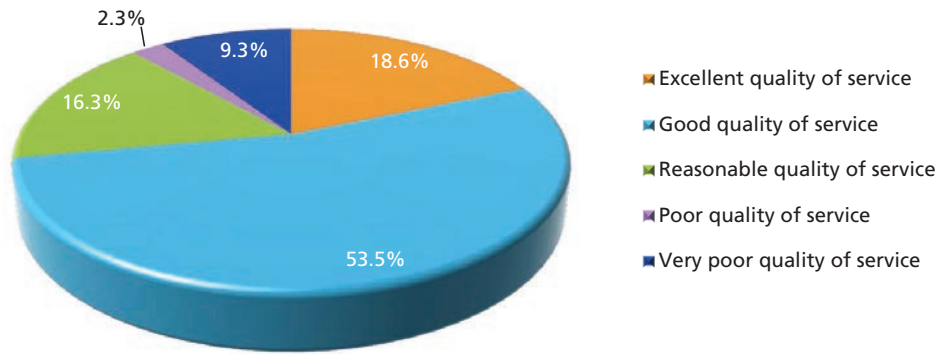
Recommendation



42.3% of the respondents stated they would only slightly recommend their payroll service providers, 34.6% of them said they would strongly recommend them and 23.1% said they would not recommend their payroll service provider to others.

EXPENSE MANAGEMENT

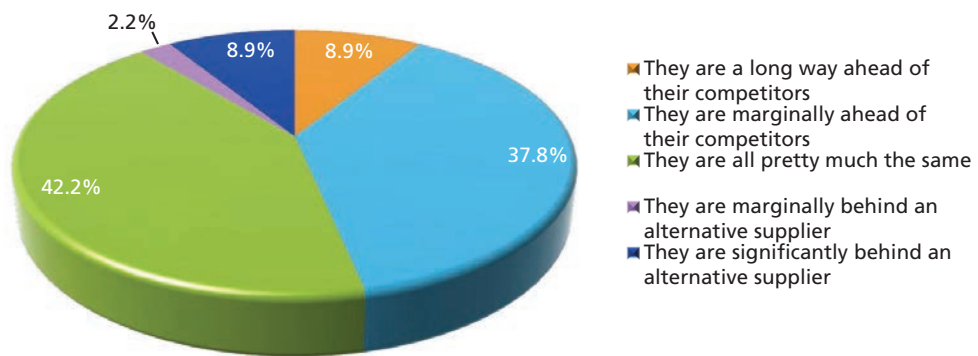
Quality of Service



Results show that expense management service providers are perceived by over half the respondents as providing a good quality of client service. 18.6% of respondents felt their provider gave an excellent quality of service. 16.3% felt they received a reasonable quality of service and only 11.6% felt they received a poor or very poor quality of client service.

61.9% of small programs found the quality of service to be good or excellent, and 19% found it to be reasonable. Another 19% found the service quality to be poor or very poor. Whereas organizations with large programs felt they received a good quality of service.

Technical Competence and Professionalism



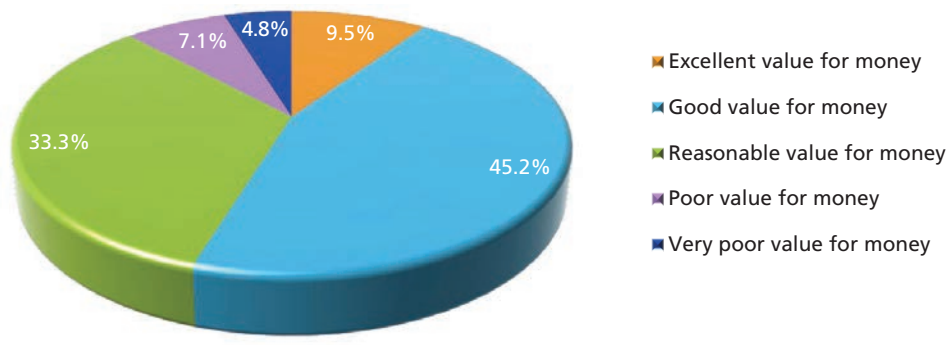
In terms of competence and professionalism, 42.2% thought that their expense management provider was pretty much the same as its competitors. 37.8% thought their service provider was marginally ahead of its competitors. 8.9% thought their service provider was a long way ahead of its competitors but 11.1% thought their service provider was marginally or significantly behind an alternative supplier.

supplier and 13% of respondents believed that their suppliers were significantly behind an alternative supplier. This shows that smaller programs again see a wider range in the level of service they receive.

For small programs only 4.3% claimed that their service providers were a long way ahead of their competitors. 34.8% felt their service provider was marginally ahead of its competitors. 43.5% thought that they were all pretty much the same. 4.3% of respondents thought that their vendors were marginally behind an alternative

supplier and 13% of respondents believed that their suppliers were significantly behind an alternative supplier. This shows that smaller programs again see a wider range in the level of service they receive. Interestingly, for organizations with large programs, none of the respondents thought that their suppliers were streets ahead of their competitors. Also, no one believed their service provider was significantly behind an alternative supplier. 50% felt their provider was marginally ahead of the competitors and the remainder felt they were pretty much the same as their competitors. Once again we can see overall that the larger programs feel that they receive a better level of service.

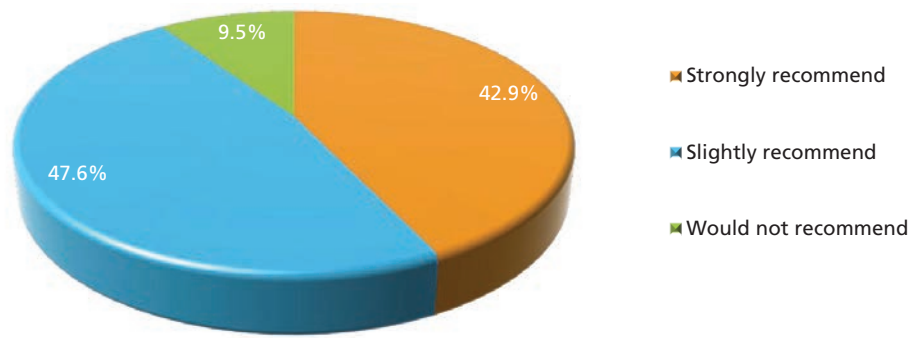
Value for Money



For expense management service providers, 45.2% of the respondents believed that they received good value for money. A third thought they received reasonable value for money and 9.5% thought they received excellent value for money. 11.9% felt they received poor or very poor value for money.

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

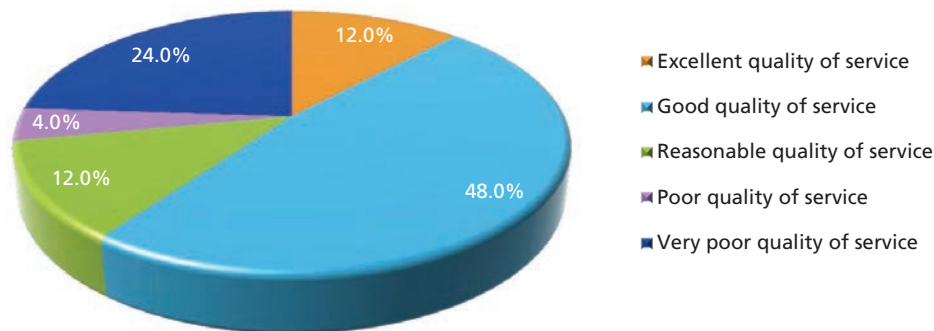
Recommendation



47.6% of the respondents stated they would only slightly recommend their expense management service provider, 42.9% of them said they would strongly recommend them and only 9.5% said they would not recommend their expense management service provider to others.

TECHNOLOGY

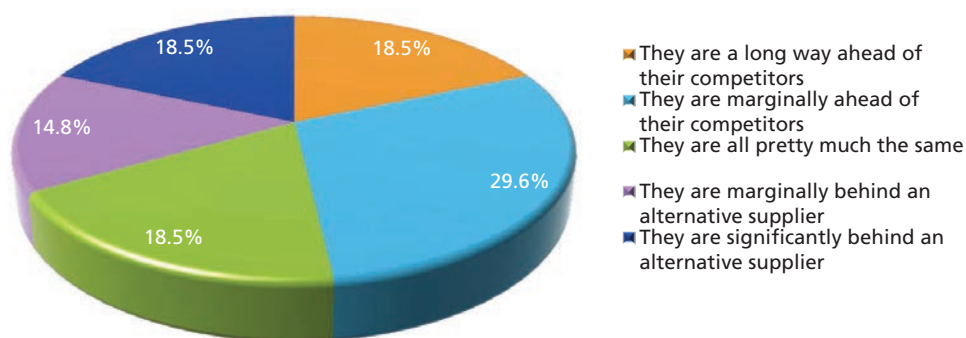
Quality of Service



Results show that technology service providers are perceived by almost half the respondents as providing a good quality of client service. 12% feel it is excellent and another 12% feel they receive a reasonable quality of service but over a quarter feel they receive a poor or very poor quality of service. This is the highest level of dissatisfaction across the service providers looked at in this survey.

A third of small programs found the quality of service to be good or excellent, and 16.7% found it to be reasonable. However half of the respondents with small programs found the service quality to be very poor. Whereas organizations with large programs felt they received a good or excellent quality of service.

Technical Competence and Professionalism



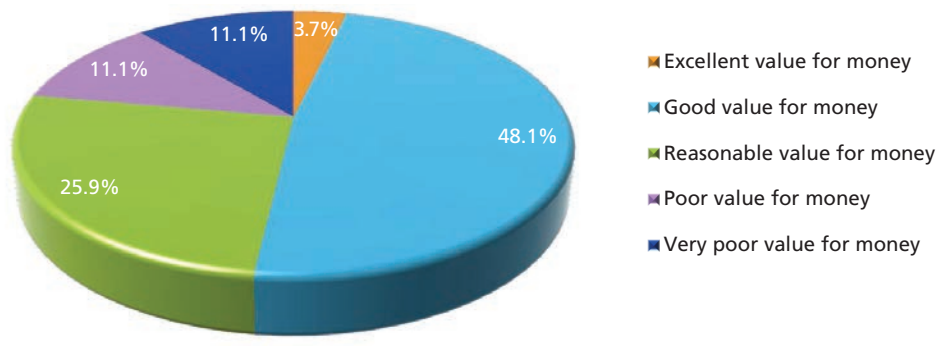
In terms of competence and professionalism, 29.6% thought their service provider was marginally ahead of its competitors. 18.5% thought that their technology service provider was pretty much the same as its competitors and another 18.5% thought their service provider was a long way ahead of their competitors. However a third thought their service provider was marginally or significantly behind an alternative supplier.

service provider was marginally or significantly behind an alternative supplier. This shows that smaller programs see a wider range in the level of service they receive.

For small programs a quarter claimed that their service provider was marginally ahead of its competitors. Another quarter thought that they are all pretty much the same. Half of the respondents thought that their

Interestingly, for organizations with large programs, none of the respondents thought that their suppliers were streets ahead of their competitors. Also, no one believed their vendors were significantly behind an alternative supplier. All the respondents felt their provider was marginally ahead of their competitors. Once again we can see the larger programs feel that they receive a better level of service.

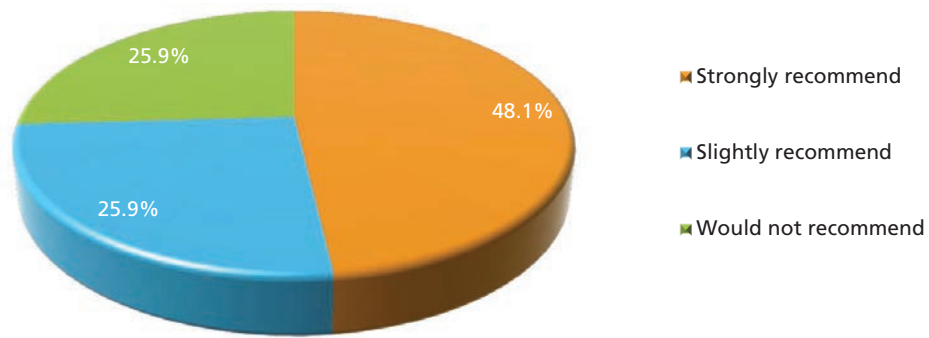
Value for Money



For technology providers, 48.1% of the respondents believed that they received good value for money. 25.9% thought they received reasonable value for money and 3.7% thought they received excellent value for money. 22.2% felt they received poor or very poor value for money.

For large programs, two thirds of the respondents thought they received good value for money and the remainder thought they received reasonable value for money. Whilst for small programs, 37.5% of the survey participants thought they received good value for money, another a quarter felt it was reasonable and the remainder felt it was poor or very poor value for money.

Recommendation



48.1% of the respondents stated they would strongly recommend their technology service providers, just over a quarter of them said they would only slightly recommend them and another quarter said they would not recommend their technology service provider to others. This is the lowest level of recommendation across all the service providers.

8. Banking

For those organizations based in the UK, the respondents answered questions with regards to banking services.

When choosing an expatriate banking provider, the respondents ranked the following service attributes in order of importance:

Service Attributes	Ranked in order of importance
Ease of account set-up	1
Dedicated point of contact before arrival	2
Cost of service	3
Product Benefits	4
Speed of Response	5
Relationship Management	6
Restriction around money held on deposit/salary	7

The respondents were also asked to rank in order of priority an assignees key considerations when they relocate:

Key Considerations	Ranked in order of importance
Accommodation	1
Schooling	2
Visa/work permit	3
Healthcare	4
Banking	5
Learning the language	6
Car purchase/transport	7
Other (please specify)	8

71% of the respondents stated that assignees prefer onshore accounts. The remaining 29% stated that assignees preferred offshore accounts.

The financial products and services considered of importance to international assignees were also ranked:

Products and Services	Ranked in order of importance
Current accounts	1
Savings accounts	2
Tax advice	3
Mortgages	4
Financial advice	5
Investment products	6
Life assurance	7
Other (please specify)	8

The other service attributes listed were credit card, ease of transferring currency, seamless international banking.

Respondents were also asked on what basis does an international assignee choose either an onshore or offshore account?

	Ranked in order of importance
Personal choice of the international assignee	1
Tax advice	2
Guidance from the corporate employer	3
Benefits of account options	4
Associate charges	5

If as a result of guidance from the corporate employer the reasons for the guidance included:

- All bank accounts for assignees within that organization were offshore
- Potential tax planning opportunities
- An organizational need to facilitate a split payroll due to local joint venture agreements.
- Existing business relationship with vendor allowing quick and easy bank account set up.
- More secure



9. Conclusion

The report presents important information that is crucial to both organizations that employ Global Mobility professionals and to the service providers in the Global Mobility Market.

The report brings together key information in critical areas of outsourcing, vendor management, structure of Global Mobility teams, market shares and vendor costs. It aims at presenting the essence of the information shared by the FEM members and 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 2012



Appendix A

List of Survey Participants

Abbott Laboratories	Celerant Consulting	Givaudan Singapore Pte Ltd
AECOM	Ceragon Networks	Graebel
AgustaWestland Limited	Chevron Corporation	Grant Thornton
Ahold USA, Inc.	Chubb Insurance Co.	Hallmark Cards
Air Liquide Australia Ltd	CIPD	Heineken
Airbus	Citibank Berhad	Holcim Group Support Ltd.
Alcatel-Lucent	Citibank, N. A.	Home Retail Group
AlixPartners, LLP	Clough Engineering	Hospira, Inc
AllianceBernstein LP	Coats plc	HR Services Manila
Allianz SE	Coca-Cola Refreshments	HSBC
Alstom Transport	Coffey International Limited	Hunt Consolidated, Inc.
Altegrity	Corporate Housing Associates	Huntsman International
Ansaldo STS	Counties Manukau District Health Board	IBM
Arcadia Professional Services Ltd	Covance	IHS Inc
Archer	Credit Suisse	ING Bank
ARINC Incorporated	Critical Mass Inc.	International School of Amsterdam
Armajaro Trading Ltd	CSC	Itron, Inc.
Arup	CTS Corporation	Johnson Controls Ltd
Ashurst Australia	Cummins, Inc.	KBR
Atkins	CWC Plc	Kellogg Company
Aurecon Group	D&B	Kelly Services, Inc.
Aviva Europe	Dankacny Global Investment Limited	Key Media Pte Ltd
Axiom	De Beers UK	Kinross Africa. S.L
BAE Systems Plc	Dechesne Relocation Management	Kohler Co.
Baker Hughes	Dell	KPMG
Ball Corporation	Deloitte	Kraft Foods Inc
Bank Leumi	Delta Recovery Systems	Kulicke & Soffa Industries
Barry Callebaut AG	Direct Energy	LEGO Group
Barry-Wehmiller Company	Discovery Communications	Linde AG
Battelle	EADS Deutschland GmbH	LINKLATERS LLP
Baxter International Inc	Eaton	Lockheed Martin Corporation
Bayer AG	Ecolab Inc.	Lonza AG
Beckman Coulter, Inc.	ECR Service GmbH	LSG Sky Chefs
Becton, Dickinson and Company	Electronic Arts	Luxottica Retail
Bell Helicopter	Elsevier, Inc.	Luxurion Real Estate Group
BlackRock	Encore Capital Group	Maersk Line North Asia
Bloomberg	ENDESA	Managed Pressure Operations
BNP Paribas	Ernst & Young	Markit NA
Bombardier Transportation GmbH	Experian	Marsh & McLennan Companies
Booz Allen Hamilton	Fidelity Information Services Ltd	Mayer Brown International LLP
Brigham Young University	Fletcher Earthquake Recovery	MeadWestvaco
British Airways	Fluor SA	Meritor
Britvic	Foot Locker, Inc.	Metro AG
Bunge Limited	General Motors Company	MFS Investment Management
Bupa	GENIVAR Inc.	Michelin Tyre plc
Cargill	Genpact	Morgan Stanley
CB&I	GHD	Mustang Engineering
CEA		MWH Global



MWV	ScottishPower	Watson Pharmaceutical
Nationwide Insurance Co	Seaboard Corporation	Wayne & Co.
Natixis	Sercos	Western Digital
Navistar, Inc.	Shell	Westpac Banking Corporation
NDS Group Ltd.	Shire Pharmaceuticals	Whitbread
Nestle	Siemens	White & Case LLP
NetApp, Inc.	SKF	Wood Group PSN
New York University Abu Dhabi	SKM	Woodward, Inc
Newedge	Smith & Nephew plc	Workday Inc.
Newmont Mining Corporation	Solución Relocation Services	Xerox Relocation & Assignment Services
Nomura	Standard Chartered Bank	Zurich Insurance Company Ltd.
Nordic Relocation Group	State Street	
Northrop Grumman Corporation	Statoil	
Norton Rose LLP	SThree Plc	
Novo Nordisk	Syngenta Crop Protection AG	
NXP Semiconductors	Takeda	
Nyrstar	Tesco	
Oslo Chamber of Commerce	Tessengerlo Chemie NV	
Palam Industries	The Boeing Company	
Panalpina	The Brookings Institution	
Parex Resources Inc.	The Hanover Insurance Group	
PAREXEL International	The Manitowoc Company	
Peabody Energy	The Sage Group plc	
Pentair International Sarl	The Scotts Company	
Pentland Brands plc	The Travelers Companies, Inc.	
PGS	The World Bank Group	
Philip Morris	THG	
Philips Electronics North America	TJX	
Pioneer Hi-Bred	T-Mobile USA	
Praxair	TNT Express	
PricewaterhouseCoopers	Towers Watson	
Prudential Plc	TownscapeHousing	
Quintiles	Toyota	
Ralph Lauren Corporation	Tupperware Brands Corporation	
Red Bull Latin America	Twitter	
Reebok International/Adidas Group	UBS	
Resources Global Professionals	UniCredit Group	
Ricoh Europe	Unilever	
RMIT International University	Unitarian Universalist Association	
Vietnam	United Overseas Bank Limited	
Roche Brazil	University of Konstanz	
Ropes & Gray LLP	University of New South Wales	
Russell Investments	Vallourec & Mannesmann	
SABMiller	Varian Medical Systems	
Sabre Holdings	Veolia Environnement North America	
SCB	Visa Inc.	
Scope International	Visteon Corporation	
Scotiabank Group	Votorantim Siderurgia	



Appendix B

List of Service Providers

Adelaide Financial Inc	Grospiron	Seyfarth Shaw
ADP	GTN	Silverdoor
AECC	Interdean/Santa Fe	SIRVA
AIReS	International Relocations	Smith Stone Walters
Alfa	Management	Sterling
Altair	IPM	Stibbs & Co
Armstrong International Movers	John Allis & Co	Suddath
Arpin	John Mason International Movers	SuiteAmerica
Asian Tiger	K2	Swain
Atlantic	Kent and Wridgeways	Talent2
Baker and Mckenzie	Kings Transfer	Team
Baker Tilly	Kingsley Napley	Team Allied
Berry Appleman and Leiden	KPMG	Team Relocation
BCF Law Firm	Lewis Silkin	TheMIGroup
BD&P	Lexicon	TM Relocation
BDO	Magrath LLP	Tozzini
BEDEL	Mazars	TransferEase
Blake, Cassels & Graydon	Mercer	TRC Global Solutions
Bridgestreet	MFR	TWW
Brookfield	Mintz & Levin, AM	Unigroup
CAI	Mobeltransport	Unimove
Cartus	Mobility Services International	United Relocation Group
CCW/CH	Moore Stephens	United Van Lines
Ceridian	Morgan Lewis	Voerman
Champion International	Move one	Weichert
Clark Hill	Movenpick Hotel	WTS
CMS	Nelson Westerberg	Xchanging
Crown World Mobility	New World Van Lines	Zulkie Partners
Daryl Flood	Nino's Executive Quarters	Zurich Relocation
Deloitte	North American Van Lines	
DWI	NOS Relocations	
EMDOC	Nova Relocation	
Emigra Ogletree	Oakwood	
Equus	Odyssey Relocation	
Ernst and Young	Packimpex	
Expat Tracker	Paramount	
Ezer Law Group	Paychex	
Faegre Baker Daniels	Pickfords	
FosterQuan	Polaris	
Fragomen	PricewaterhouseCoopers	
Fraser and Somerset	Pro-Link Global	
GB Liners	Proskauer	
Global LT	Quarles & Brady	
Go Native	Sarah Buttler Associates	
Goldblum & Hess	Satterlee Stephens Burke & Burke LLP	
Graebel Relocation	Secor Group	
Grant Thornton	Settelen	
Greenberg Turner	Setwell	



Appendix C

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 staff on a daily basis plus selected service providers who bring expert advice, support and services to facilitate effective cross border employment and living. The range of sectors covered is extensive, including pharmaceutical, finance, petrochemical, defense and retail; their issues and requirements for information are universal.

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.



Appendix D

Sponsor Profiles



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www.natwestglobal.com

NatWest Global Employee Banking (NWGEB) is a specialised department within NatWest who work with Company HR functions and Relocation Agencies to offer a streamlined account opening service for relocating employees.

NWGEB was established 17 years ago and has long standing relationships with many multinational organizations. The organization does not have to bank with NatWest to be able to use the NWGEB service. NWGEB have helped approximately 30,000 relocating employees open bank accounts in the UK over the last 4 years. One of the main benefits of the service is that employees can apply for their bank account before they arrive in the UK so their account is ready when they arrive.





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www.CrownWorldMobility.com

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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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