

The Forum For
Expatriate Management



Managing the Global Mobility Function 2011 – A Benchmark Study



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Foreword

Managing the Global Mobility Function is a vital strategic and practical challenge for every Global Mobility Director and we at Equus Software are delighted to be associated with this important and ground-breaking research study.

Every Global Mobility Director needs to make important decision about how to structure his/her Global Mobility Team, what services to outsource and how to manage the vendor panel. This survey helps answer many of these mission critical questions by providing in-depth analysis of all areas of Global Mobility management including extensive peer group benchmarking.

As a leading technology company focused on the Global Mobility profession, we are delighted to see that The FEM has engaged web technology to unite the Global Mobility profession both through research studies like this one and through social media platforms such as Facebook and LinkedIn.

From our own perspective, we naturally encourage all players to embrace technology to the fullest extent. For example, we are seeing a growing number of companies move away from spreadsheets and using bespoke software packages to manage their global mobility programs. This trend was highlighted in a previous Research Report (also sponsored by Equus Software) copies of which are available on request either from the FEM or from Equus Software.

We believe that Managing the Global Mobility Function is a must-read document for all Global Mobility professionals. We hope you find its findings as illuminating and thought-provoking as we have.

Mark Thomas
CEO
Equus Software

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1. Introduction

In the current global economic climate, organizations are increasingly recognizing that one of the most effective ways of expanding their talent network and coping with the challenges of globalization is through the Global Mobility function.

Establishing and maintaining a successful Global Mobility program is a challenge in itself but has magnified returns for the organization. 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. The present report is one of many such initiatives that the FEM has taken in this direction. In the pages that follow, 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 is unique in more ways than one. It marches ahead of other surveys which purely benchmark policies and programs and probes into the details of how Global Mobility programs are organized, managed and delivered to the global assignee population.

The FEM, utilizing its membership base, has developed this major survey that 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
- Professional qualifications of team members

The additional areas explored this year include vendor management and an analysis of the market share of the service providers in various industry segments.

In the pages that follow the responses and information collected through the survey is presented and analyzed in a way that would be of crucial use to Global Mobility Professionals worldwide.

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 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 2011

2. Executive Summary

More than 315 companies completed the survey and we have produced data based on program size, sector and other relevant criteria. The respondent list reads like ‘Who’s Who of Global Mobility’.

Our survey respondents were all in-house Global Mobility professionals with nearly 90% being Global Mobility Directors, Managers, or Regional Heads.

The Key findings of our survey are as follows:

Who are Global Mobility professionals?

- 67.2% of Global Mobility professionals have a recognized HR qualification.
- Over 20% of our respondents have worked in the field of Global Mobility for over 15 years and another 20% for a period of 10 to 15 years.
- Only 21.6% have a recognized Global Mobility qualification, e.g. GMS.
- 53.2% of Global Mobility professionals have a post-graduate degree, e.g. masters or MBA

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 25.5% of teams report directly to VP Human Resources.
- A significant number of respondents believed that the Global Mobility function should report to Compensation and Benefits (37.5%), followed by VP HR (32%).
- 53.2% of Global Mobility teams are centralized at one location. Large programs (1000+ assignees) tend to be de-centralized into multiple locations or on a regional hub basis.

What services are outsourced?

- A total of 90.9% of respondents reported that they outsource Tax and 84.3% outsource Removals and Household Goods. Other highly outsourced services are Immigration (76.1%) and Relocation services (75.6%).

- 66.1% of respondents stated that they do not outsource Assignment Management and have no intention of doing so. However 11.1% who currently do not outsource at present are actively considering it.
- 4.8% of respondents have brought their Assignment Management back in-house after having outsourced it.

What is an appropriate Assignee Caseload Ratio?

The Assignee Caseload Ratio gives us an insight into the appropriate ratio of assignees per GM professional. The findings from this survey demonstrate the following;

- For small programs (under 100 assignees): the median Caseload ratio was 48 assignees per head
- For large programs (over 1000 assignees): the Median Caseload Ratio was approximately 60 assignees per head.
- We would expect that a valid and reasonable benchmark for a typical program to be 48-1 for a small program and 60-1 for a large program. These median numbers disguise a broad range that is much influenced by the structure of the GMT itself. We can provide further detailed information to interested organizations.

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; \$4,200 for Tax, \$3,600 for Removal/Household Goods and \$910 for Relocation and Destination Services.
- For medium sized programs, the cost per assignee for tax was \$3,381, Removal/Household Goods cost per assignee was found to be \$3,433 and the cost for Relocation Destination Services was \$ 1,708 per assignee.
- For large programs, the cost per assignee for Tax was \$2,010, \$3,357 for Removal/Household Goods and \$1,165 for Relocation and Destination Services.
- Organizations with medium programs spend the highest amount on Relocation/Destination Services for their assignees.

- Organizations with large programs spend on average half as much money on Tax services than small programs.
- It was clear from our survey results that large programs were benefiting from economies of scale in almost all the business areas.
- The average cost of running a Global Mobility Team (base salary plus bonus) is equivalent to \$3,322 per assignee.
- The average salary (including bonus) of Global Mobility professionals is \$ 103,412.

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 (41.8%) of respondents said they relied on assignee 'noise' and informal feedback, 31.1% reported that it was their vendors who conducted a survey for them and only 25.4% said they conduct a formal internal survey on assignee satisfaction.

How often do firms go out to RFP?

- In the main service areas including Tax, Immigration and Relocation Management etc, the frequency with which a typical firm switches its main service providers is circa 3 years.
- Surprisingly almost 14% of respondents have not been for RFP for 5 years or more. The majority of respondents (80%) go out for RFP between every 2 to 5 years. And the best practice seems to be every 3 years (nearly 45%).
- Companies tend to switch their major service provider more often for Corporate Housing and Shipping/Housing Goods than for Tax and Immigration.

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, service quality received high levels of client satisfaction. Amongst all the service providers, Corporate Housing seemed to provide the best client service for the best value

according to survey respondents. Overall results suggest that the vendors' approach to their clients and business in general was competent and professional.

- Clients with large programs are more likely to be satisfied with levels of client service than small programs.
- Clients with small programs are more likely to feel they are getting good value for money than large programs.
- Respondents with large programs are more satisfied with their tax vendors in terms of their service quality than those with small programs.
- Survey participants with large programs have a stronger belief in the competence and professionalism of their tax vendors than respondents with small programs.
- Immigration is the area where respondents are most likely to recommend their service provider. Relocation Management is the least likely to be recommended.

Market Share

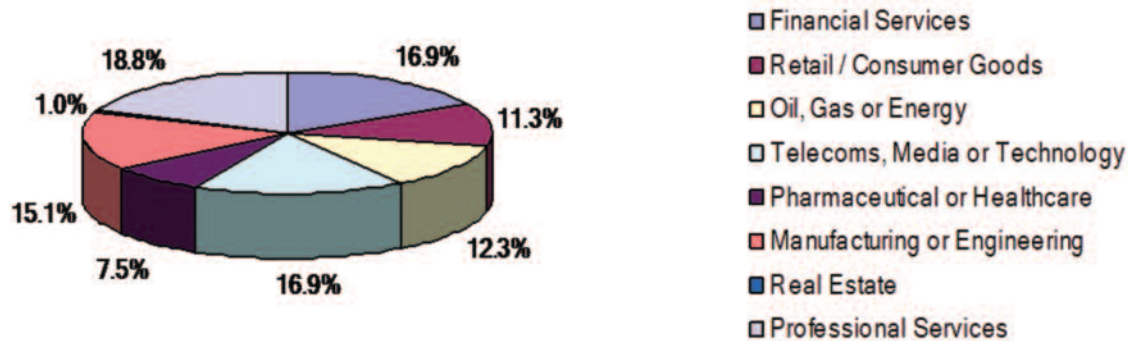
- PwC is the leading Tax firm by market share. Fragomen has by far the largest market share for immigration. Cartus has the largest market share for Assignment Management, Relocation Management and Household Goods. Deloitte is the market leader for Technology.
- For each market segment we have determined the leading service providers by market share. Our analysis is based on number of clients rather than assignee volumes. However on request we can produce market share data based on program size, headquarter location or industry sector.
- Although the tax market is dominated by the Big Four, we are beginning to see some evidence of smaller firms making inroads, especially into the small programs category.
- PwC is the tax market leader with Deloitte in the number two position. However, for large programs (over 1000 assignees), KPMG and Ernst & Young are the market leaders.
- For Relocation Management, the top 5 are Cartus, SIRVA, Prudential/Pricoa, Crown and TheMIGroup.
- For Household Goods, the top 5 firms are Cartus, Team, Crown, Interdean and Sterling.

3. Participant Demographics

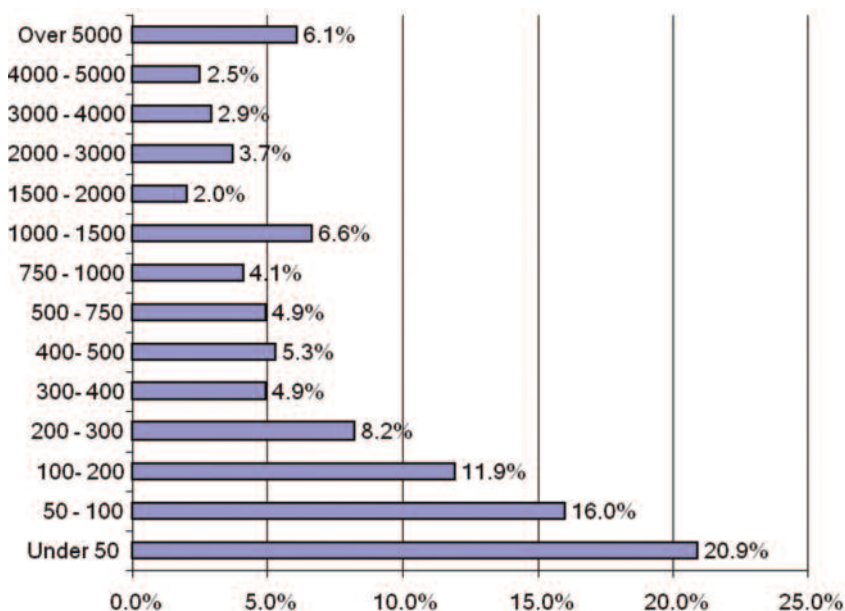
This section sets out some detailed demographics of the survey population. It includes industry sector of the participating organizations, their headquarter location as well as the program size (for ease of definition organizations were divided into small, medium and large programs, based on the number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

For the survey population as a whole, respondents were located in three main industries - Professional Services (18.8%), Financial Services and Telecoms, Media or Technology, both consisting 16.9% of the survey population. Finally, a large proportion of respondents were also located in the Manufacturing or Engineering or Engineering industry (11.5%).

Industry Sector



Number of Assignees

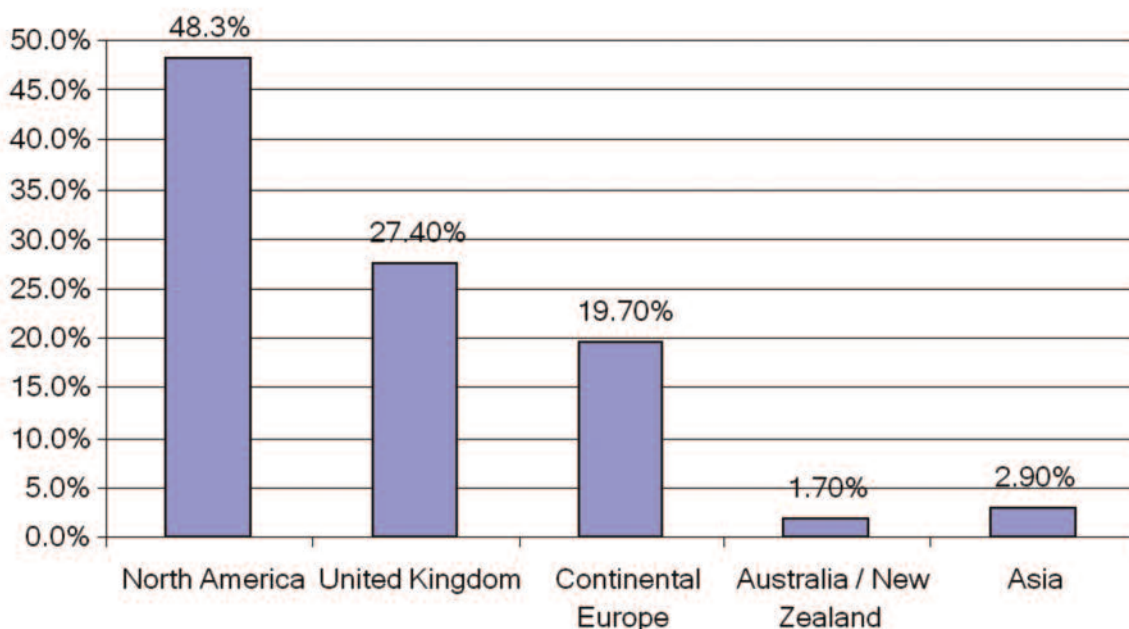


Number of Assignees

Over 37% of respondents have fewer than 100 assignees, around 39% have between 100-1000 assignees, and around 24% 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).

Headquarter Location for all Companies



The median number of assignees is 215. The inter-quartile range for Global Mobility Programs is 63-927. The Upper decile programs start at 3520 assignees. Respondents were asked where their headquarters are located. This is shown in the chart above.

Those companies with headquarters in North America and Europe were nearly equally split: there was a total of 48.3% with a North American headquarters, compared to 27.4% in the UK and 19.7% in Continental Europe – totaling 47.1%.

In addition, the more detailed analysis showed that

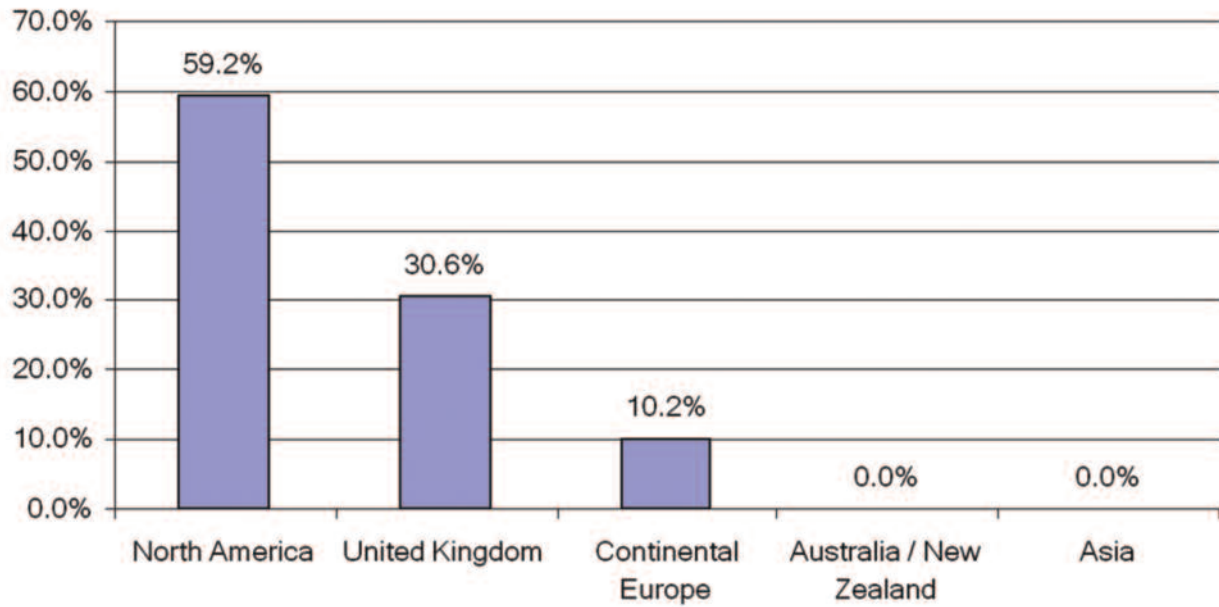
the HQ location of these organizations with large programs shifted more towards North America with a total of 59.2%, compared to around 40% based in Europe – with 30.6% located in Continental Europe and 10.2% in the UK.

Similar proportions were found in the organizations with small programs (with over 52% HQ located in North America and 42% in Europe).

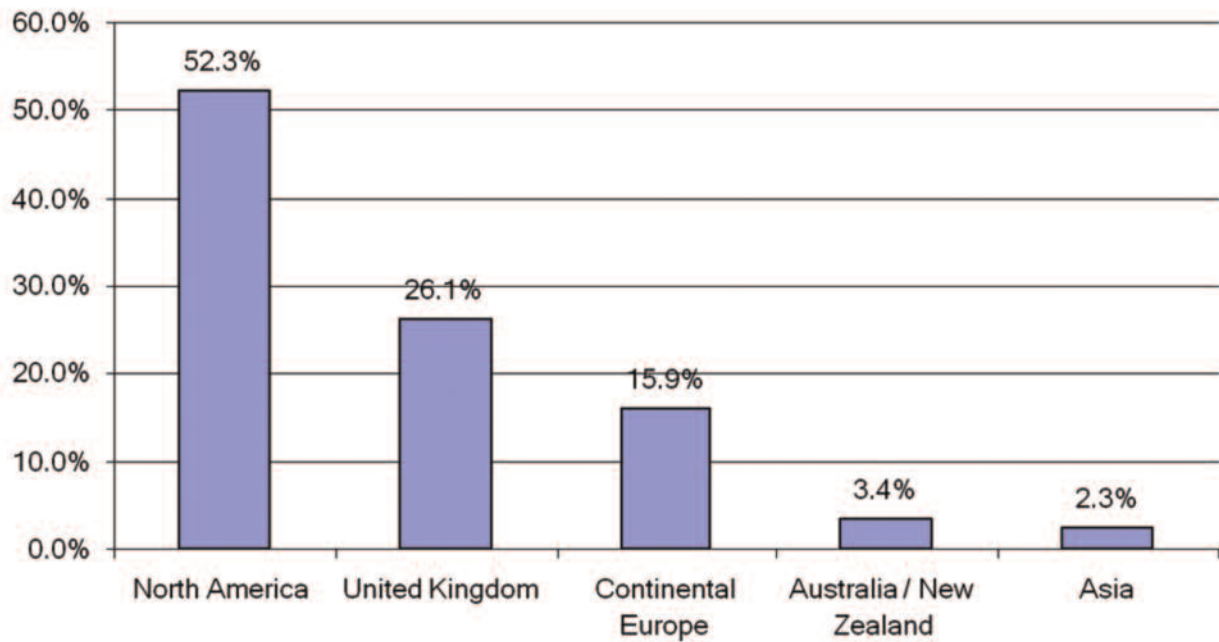
INTERESTING FACT:

There are more Headquarter locations in the UK than in the rest of Europe combined.

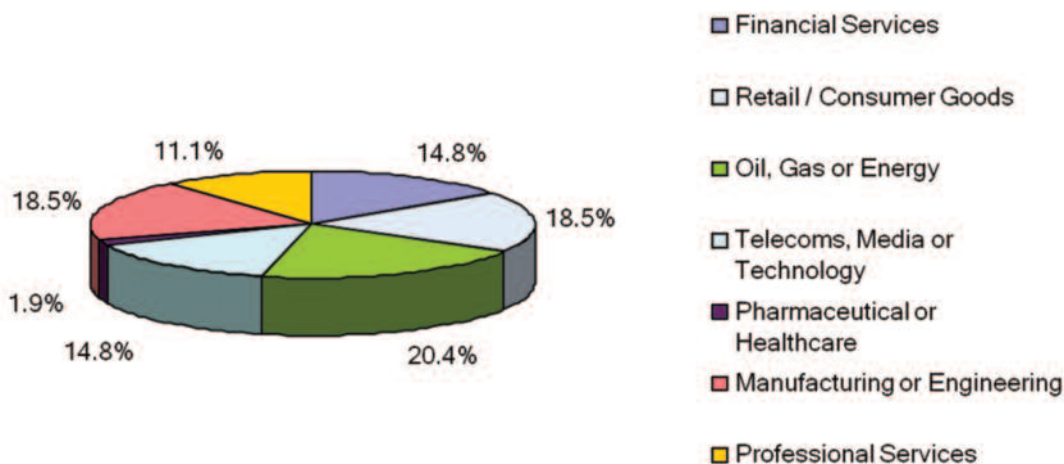
HQ Location for Large Programs



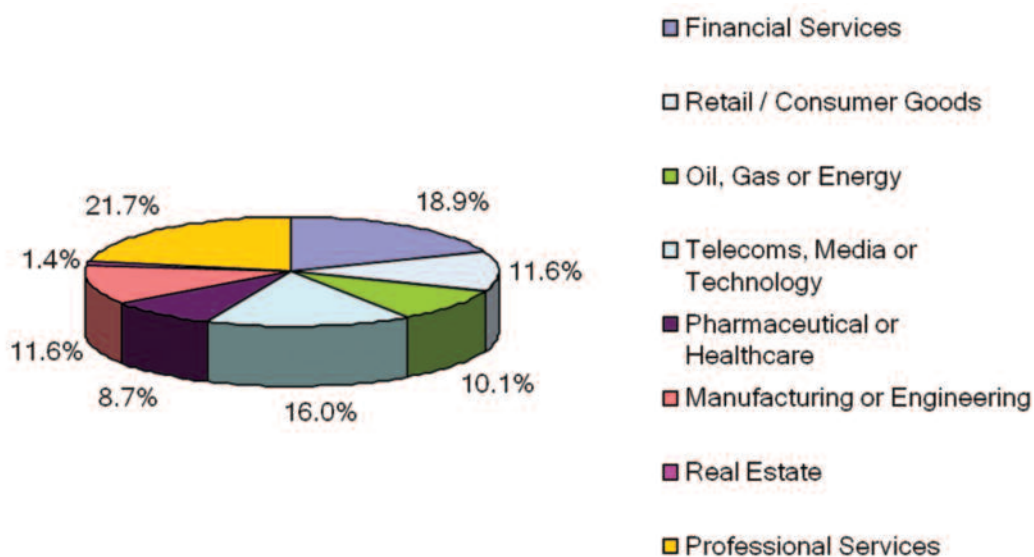
HQ Location for Small Programs



Industry Sector for Large Programs



Industry Sector for Small Programs



Detailed Analysis

Organizations with large programs were located in Oil, Gas or Energy sector (nearly 21%), followed by Manufacturing and Engineering and Retail/Consumer Goods (both 18.5%). Pharmaceutical or Healthcare industry was indicated by only 1.6% of respondents.

On the other hand, organizations with small programs were located mainly in the Professional Services sector – nearly 22%, followed by Financial Services – 18.9% and Telecoms, Media or Technology (16%). Real Estate sector accounted for only 1.4% of responses.

INTERESTING FACT:

There is a strong correlation between industry sector and program. While the location of large programs were mainly in the Oil, Gas or Energy sector - 21%, only 10% were in the Professional Services sector. Interestingly, small programs have exactly opposite proportions – 21% for Professional Services and 10% for Oil, Gas or Energy sector.

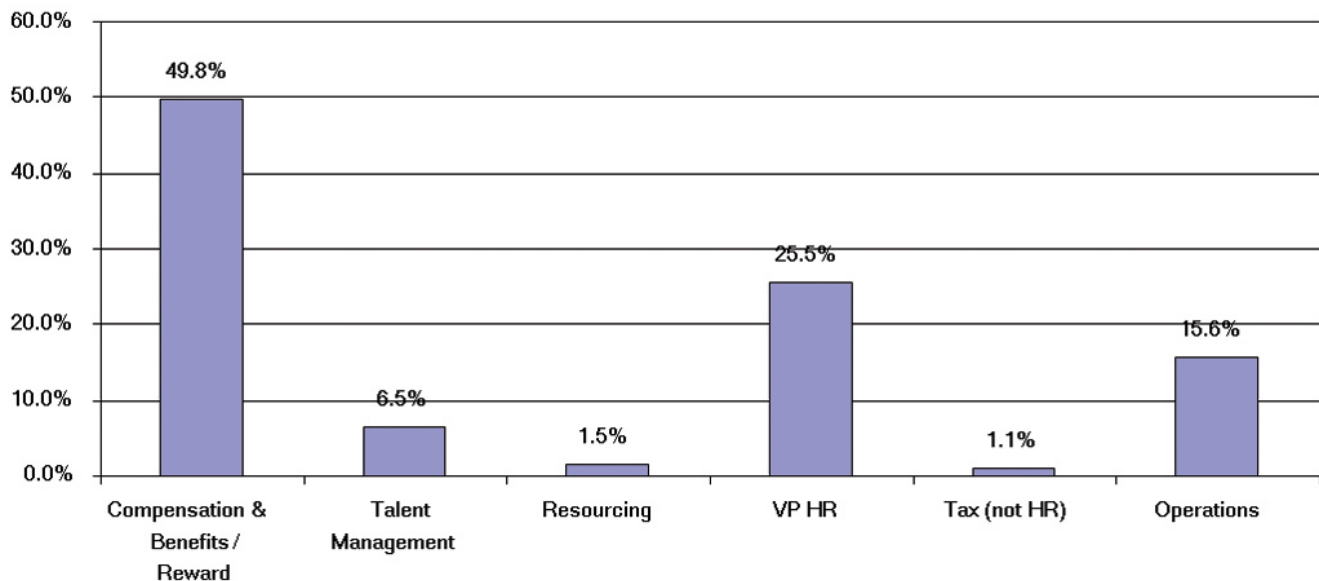
4. The Global Mobility Function

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.

How do Global Mobility Teams (GMT's) work within the respondent's organizations?

Where does your Global Mobility Team report?

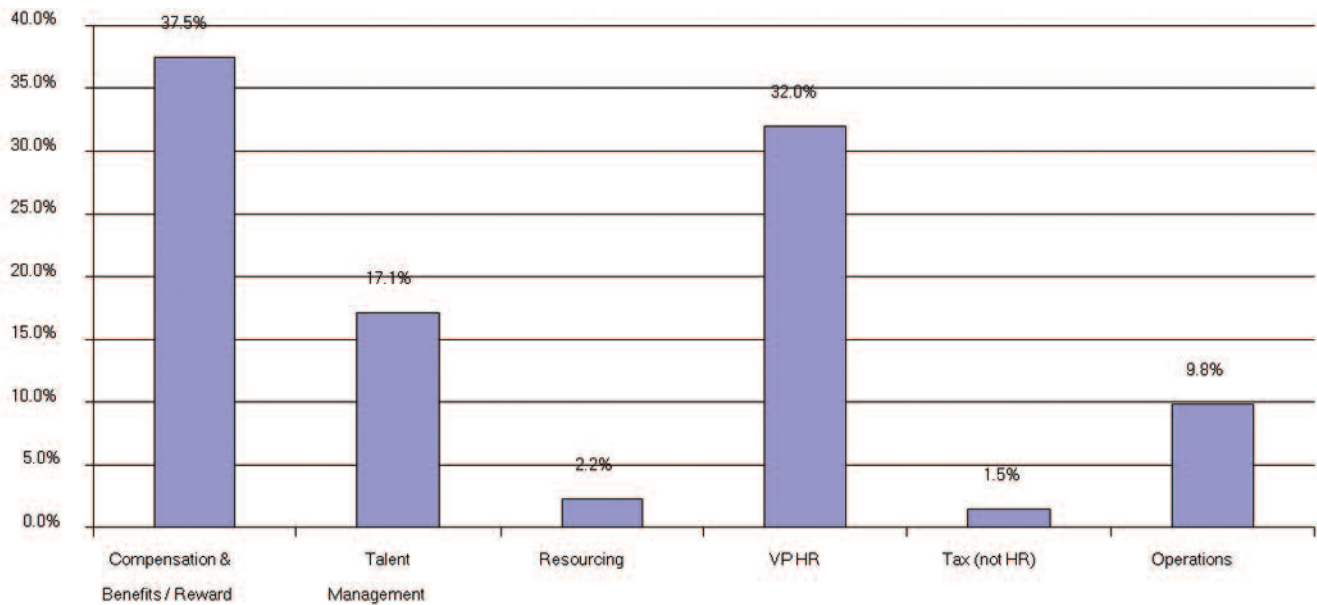


Results for the whole survey population revealed that almost 50% of the respondents report into Compensation and Benefits/Reward. The next area that was majorly reported into was VP HR (25.5%). HR Operations were reported into by GMT's by a total

of 15.6% whilst Talent Management was reported into by 6.5%. Finally, Resourcing was reported into by 1.5% and 1.1% 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. The data shows the results portrayed in the chart below:

Where should GMT report to?



Around 37% of the respondents maintain that the Global Mobility function should report directly into Compensation & Benefits / Reward. From these results, it can be observed that out of the 49.8% of Global Mobility Teams that report directly into Compensations and Benefits, around 12.3 % 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 to talent management as it is probably considered as a more relevant and important area to report into. Respondents also believed that there should be less reporting to Resourcing, Tax and Operations.

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 Global Mobility reporting into Talent Management, with those who actually report into this area at 6.5% and those who believe they should at 17.1%. The figures reflect that teams may be wishing to become more closely associated with the overall people strategies of their respective companies.

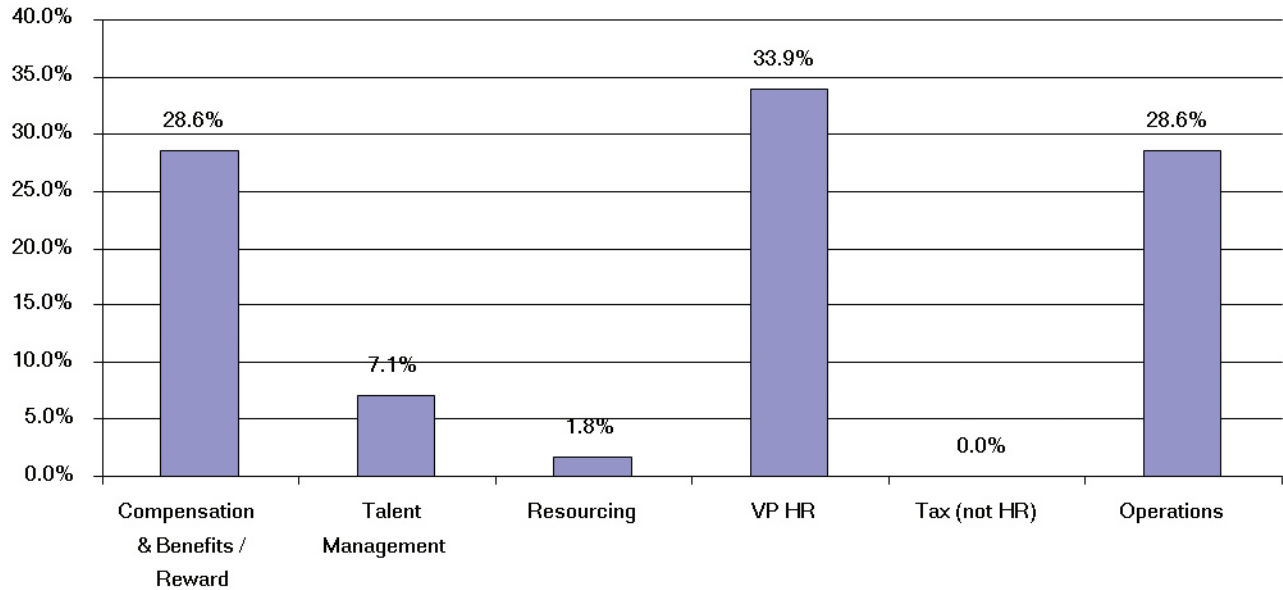
INTERESTING FACT:

Almost 50 % of the Global Mobility Teams report into Compensation and Benefits/Reward. Having said that, a large proportion of the survey respondents wish to switch their reporting line into VP HR and Talent Management.

Detailed Analysis

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

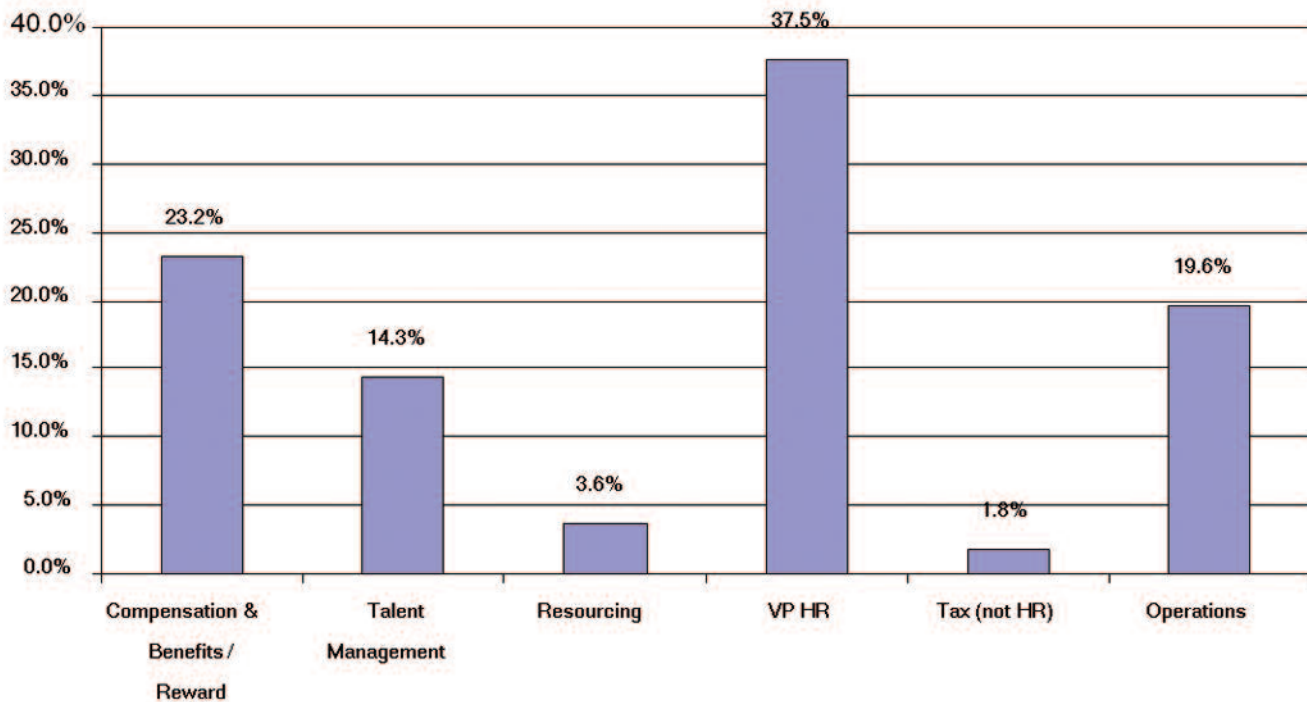
Where the GMT reports? (Large Programs)



Results show that for large programs (over 1000 assignees) the highest reporting is made to VP HR (33.9%), closely followed by 28.6% of respondents reporting into Operations and Compensation &

Benefits/Reward respectively. Only around 2% of the respondents reported into Resourcing, 7.1% reported into Talent Management and none were found to report into Tax.

Where should GMT report to? (Large Programs)



There were perceived differences in the areas where GMT professionals currently report into and where they would want to report into. The table above gives us an insight into this.

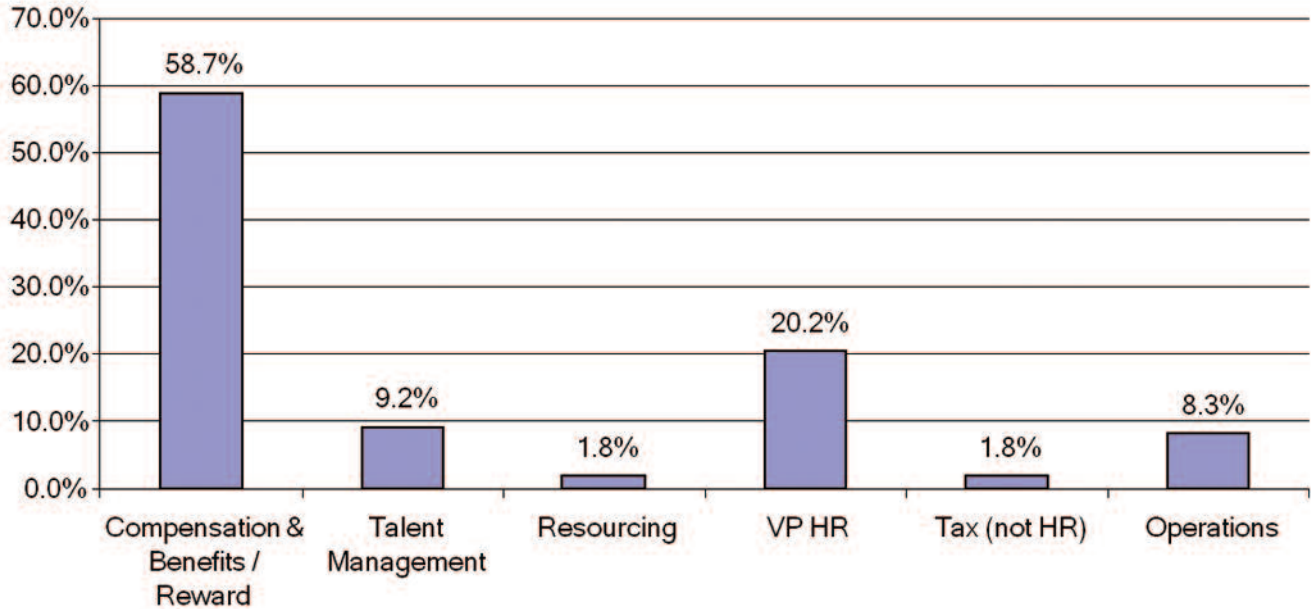
According to the survey results, 37.5% of the GMT professionals would like to report into VP HR compared to the 33.9% who are currently doing so. Hence there is an increase in the number of professionals who would like to report more into VP HR. As for Compensation & Benefits/Reward, amongst the 28.6% of respondents currently

reporting into that area, 5.4% would like to make a switch in their reporting line. The rest claimed they still wish to report into Compensation & Benefits/Reward. A decrease in the number of respondents who would like to report to Operations (19.6%) was noted. On the other hand, there was a small increase amongst those who would like to report to Resourcing (3.6%) and Tax (1.8%). It should be taken into account that Talent management is quite popular with GMT professionals as an additional 7% of them thought they should report into Talent Management.

Detailed Analysis

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

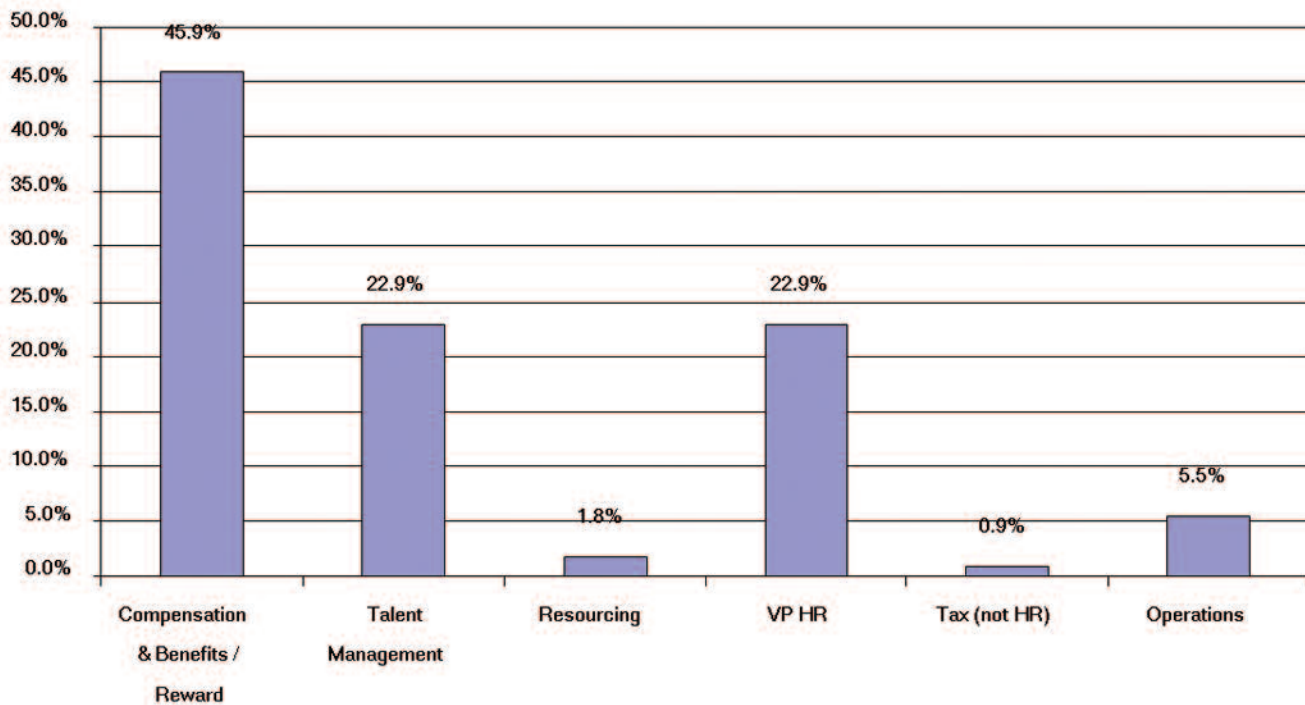
Where does your Global Mobility Team report? (Small Programs)



A clear majority of the respondents for small programs (under 100 assignees) report into Compensation & Benefits/Reward (58.7%). The next area that was significantly reported into was VP HR

(20.2%), followed by GMT reporting into Talent Management (9.2%) and Operations (8.3%). A small number of respondents said they reported into Resourcing and Tax (both at 1.8%).

Where should GMT report? (Small Programs)



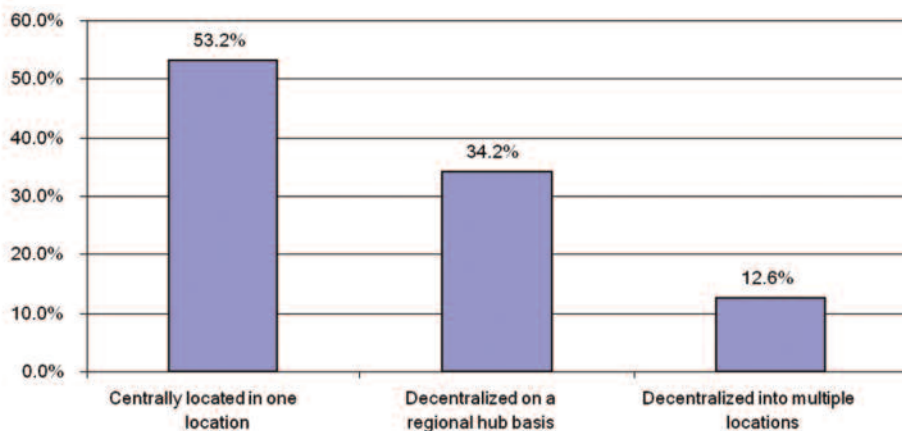
Although a majority of respondents for small programs still maintain that reporting should be made to Compensation & Benefits/Rewards (58.7%), 12.8% amongst those respondents believe they should switch their reporting line.

Interestingly, the two other most popular departments which respondents believe their Global Mobility function should report into was Talent Management and VP HR (both at 22.9%). A small number of respondents (2.7%) thought they should report into VP HR whilst there is a sharp increase in the number of respondents (13.7%) who think they should report into Talent Management. There was also the belief amongst a small number of respondents that there should be less reporting into Tax (0.9%) while those currently reporting into Resourcing do not want to make any switch whatsoever.

Structure of Global Mobility Teams

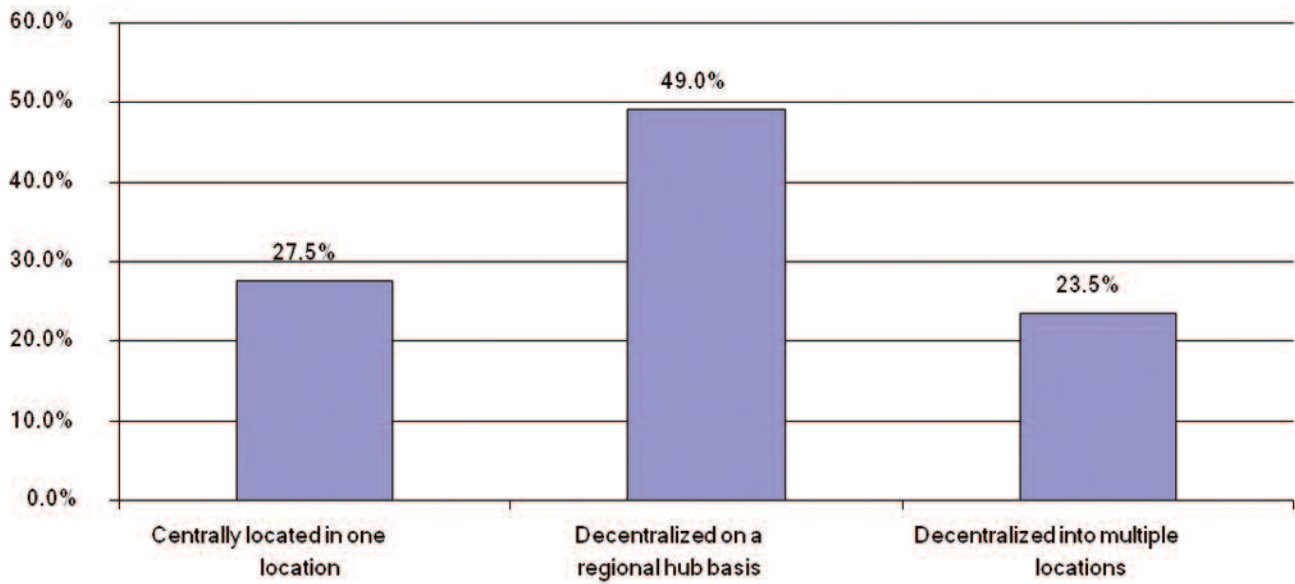
Our study also explored the structure of the Global Mobility Teams (GMT). 53.2% of the survey population reported their GMT was centrally located in one location. 34.2% have decentralized their GMTs on a regional hub basis. And only around 12% have decentralized into multiple locations. However there are some differences between small and large programs in this scope.

Structure of Global Mobility Teams



Detailed Analysis

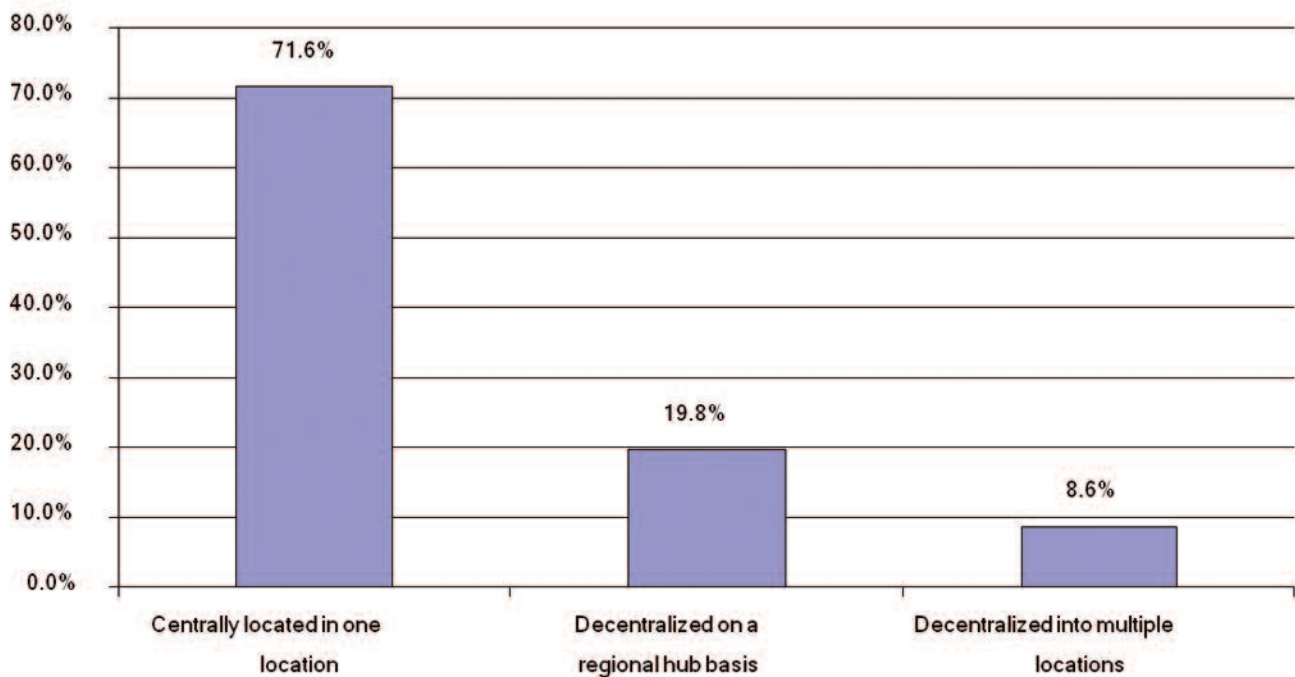
Structure of GMTs (Large Programs)



The data analyzed showed that 49.0% of respondents with large programs reported that their GMTs were decentralized on a regional hub basis, with 23.5% also decentralizing their GMTs into multiple locations. Only

around 28.0% centrally located their GMT in one location, which leads to the conclusion that the bigger the size of the program, the more decentralized it is.

Structure of GMTs (Small Programs)



On the other hand companies with small programs tended to be centrally located in one location – with a total of 71.6% of responses. Only 19.8% of respondents reported their GMTs were decentralized on a regional hub basis and just 8.6% decentralized into multiple locations.

This shows considerable differences between GMT structure and program size, with larger programs adopting a decentralized approach on a regional hub basis, and GMT’s looking after smaller programs opting 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 are decentralized into multiple locations or on a regional hub basis.

Cost of running the Global Mobility Function

Survey participants were asked to indicate their overall pay bill (base salary plus bonus only) for their Global Mobility Team. From this analysis we can estimate that the average cost of running a Global Mobility Team is \$3,322 per assignee. (This is purely the salary/bonus cost only and does not include benefits or establishment overheads).

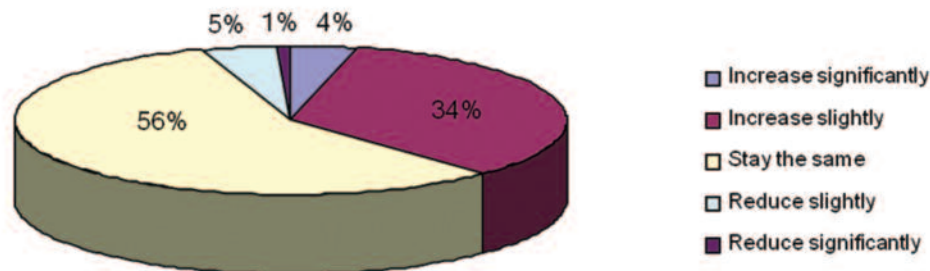
The inter-quartile range for running a Global Mobility Team is \$1,800 - \$4,000 per assignee.

The average salary (including bonus) of Global Mobility Professionals throughout all industry sectors and all geographies is \$ 103,412 with an inter-quartile range of \$60,000 - \$135,000.

Future outlook

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. 34% of the respondents thought that the number of people working in their Global Mobility Team would increase slightly and 4% thought there would be a significant increase. A small proportion of respondents thought that, over the next 12 months, the number of people working for their Mobility Team would reduce slightly and only 1% thought the number of people working in their Global Mobility Team would decrease significantly. Hence it can be seen that a significant proportion of the respondents are expecting an increase in the number of people working their Global Mobility Team in general.

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

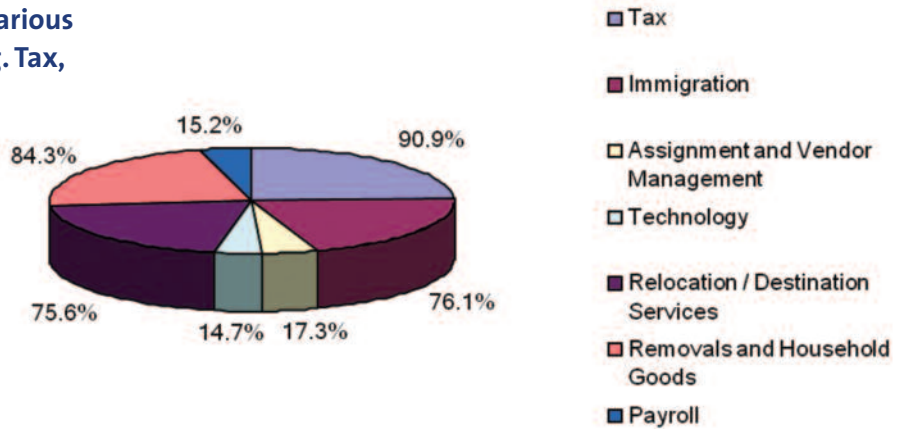


5. Outsourced Services

Many organizations outsource Global Mobility functions to other firms. Some do it more than the others depending upon program size and various other factors. In this section we analyze various services that organizations outsource (e.g. Tax, Immigration, Removals and Household Goods, Payroll) along with the intentions of outsourcing Assignment Management. The data also revealed a rough estimate of the cost of different services per assignee in relation to program size.

Over 90% of respondents outsource Tax, closely followed by nearly 85% of respondents outsourcing Removals and Household Goods. The next two highly outsourced services were Immigration (76.1%) and Relocation Services (75.6%).

Outsourced Services



The three services outsourced least by respondents were Technology (14.7%), Payroll (15.2%), and Assignment and Vendor Management (17.3%).

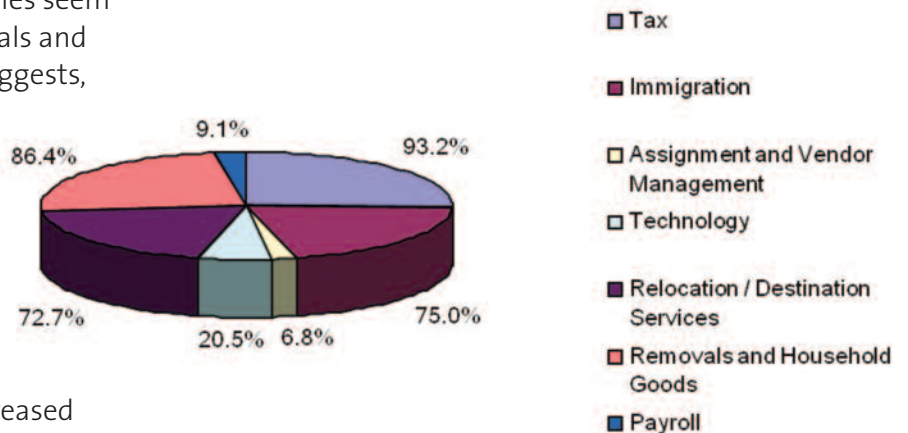
INTERESTING FACT:

Organizations with relatively large programs have a significantly large number of their Assignment and Vendor Management services outsourced when compared to those with smaller programs.

Are outsourced influenced by program size?

It is interesting to see that when compared to the average of all the programs, large companies seem to outsource more of both Tax and Removals and Household goods services. As the table suggests, the number increases by 2% for both and for Technology by 5.8%. On the other hand, for the rest of the services outsourcing decreased in amount. Large programs seem to outsource lesser number of Immigration services (decreased by 1.1%), Assignment and Vendor Management services (decreased by 10.5%), Payroll Services (decreased by 6.1%) and Relocation/ Destination Services (decreased by 2.9%).

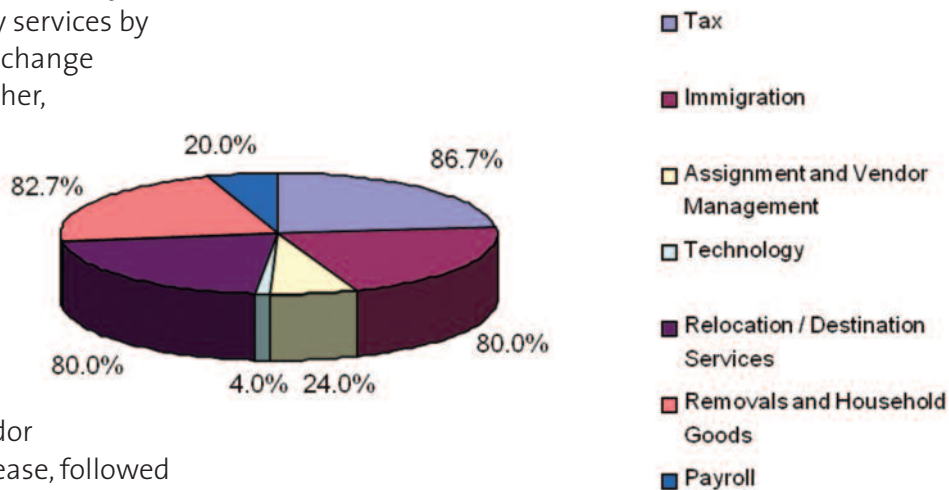
Outsourced Services – Large Programs



The figures change again for small programs.

Compared to the figures reported for the whole survey population, organizations with relatively small programs outsource Technology services by 10.7% less. This was the most striking change when it came to small programs. Further, outsourcing of Tax services fell by 4.2% and that of Removals and Household goods services fell marginally by 1.6%. All the other services were observed to be outsourced more by small firms in relation to the whole survey population. The highest increase was seen in the Assignment and Vendor Management sector with a 6.7% increase, followed by Payroll services (a 2.8% increase). Further, the number of organizations outsourcing Relocation/Destination as well as Immigration services has also increased (by 4.4% and 3.9% respectively).

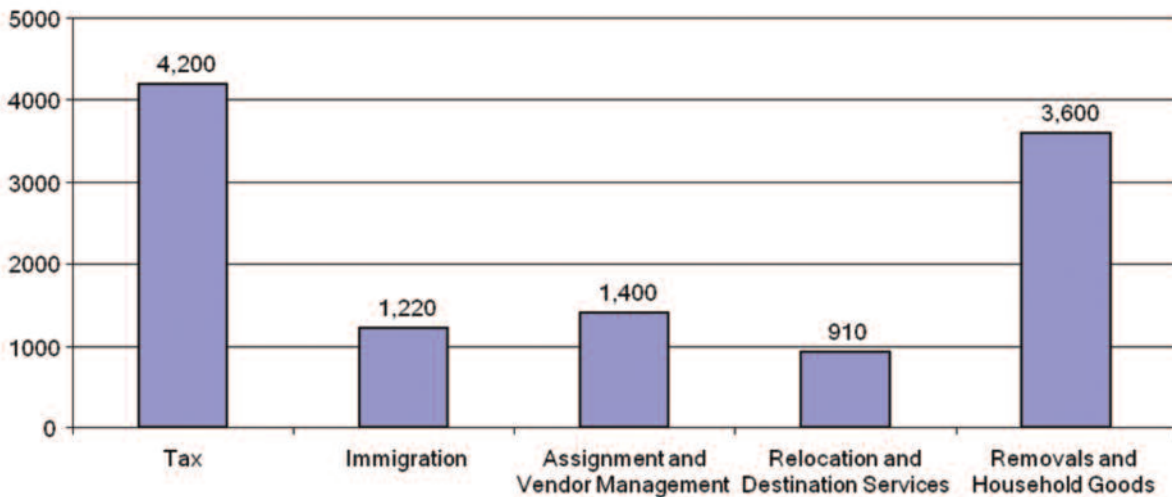
Outsourced Services – Small Programs



INTERESTING FACT:

Organizations with relatively small programs outsource significantly less of their technology services

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



Detailed Analysis

The data obtained from our survey reveals a rough estimate of the costs of different services (e.g. Tax) per assignee. This exploration looks at the estimate per assignee in relation to program size. All figures are in US Dollars.

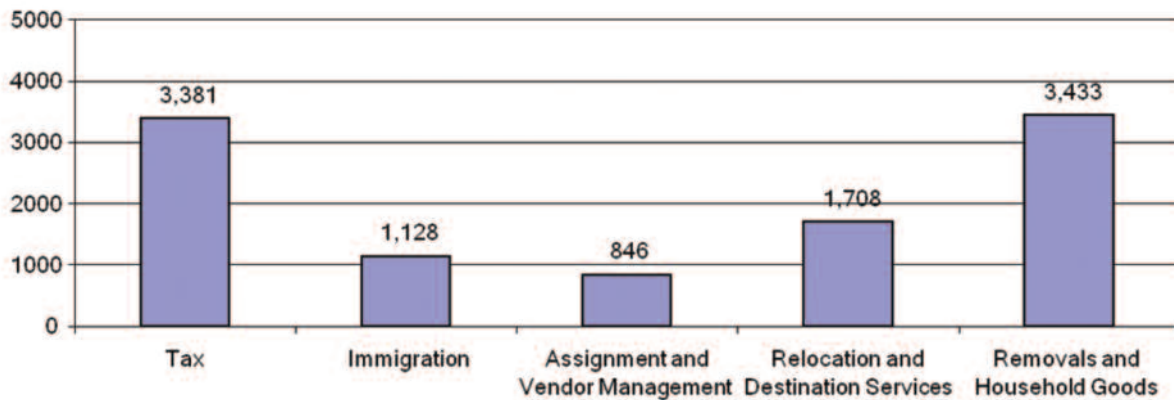
This bar chart shows the difference in costs for small programs in relation to the different areas of assignment management. As shown, Tax is highest cost service (\$4,200 per assignee), followed by Removal/Household Goods with an average of \$3,600 per assignee for assignees on small programs.

Relocation/Destination Services are the least costly for assignees on small programs with an average cost of \$910 per assignee.

The average costs for the other services in relation to small programs include Immigration cost of \$1,220 per assignee and Assignment/ Vendor Management with an average of \$1,400.

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

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).

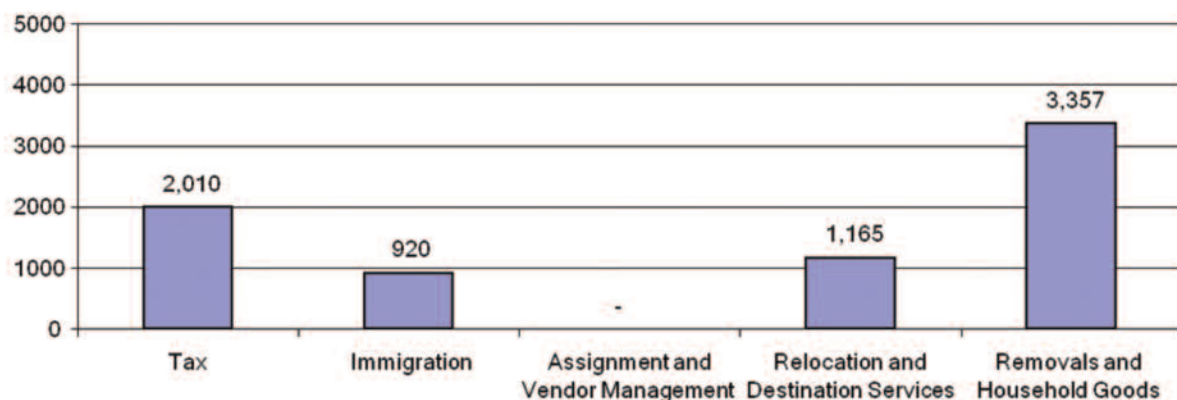
Surprisingly, the cost of Relocation/Destination Services has increased almost twice from \$910 in small programs to \$1,708 in medium programs.

There was insufficient data for calculating cost per assignee for Technology and Payroll services.

INTERESTING FACT:

Organizations with medium programs spend the highest amount on Relocation/Destination Services for their assignees.

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



For large programs, cost per assignee falls significantly. Tax return fees are half of what small programs pay. The only area that does not experience significant economies of scale is Removals/Household Goods.

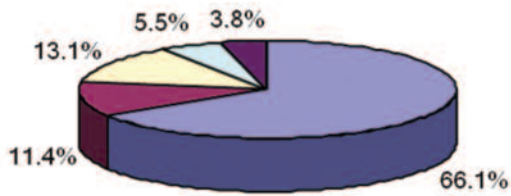
This data was computed using the overall amount spent by the organizations on their assignees and the number of assignees worldwide. The amount spent on tax services does not include just the amount spent on preparation of tax returns but also amount spent on tax consulting projects.

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

INTERESTING FACT:

Organizations with large programs spend half the amount of money on Tax services than small programs.

Outsourcing Intentions



- We do not outsource assignment management and have no intention of doing so.
- We do not outsource assignment management but are actively considering it.
- We currently outsource assignment management and plan to continue doing so.
- We currently outsource assignment management but are actively considering bringing it back in-house
- We used to outsource assignment management but have now brought it back in-house

Detailed Analysis

In the survey respondents were asked for their views on outsourcing assignment management. Results are shown in the pie chart above.

A total of 66.1% of respondents revealed that they do not outsource assignment management (AM) and have no intention of doing so. However, 11.1% of respondents who do not outsource their AM at present, are actively considering it.

13.8% of respondents currently outsource AM and plan to keep doing so. A total of 4.2% currently outsource AM but are considering bringing it back in-house and 4.8% have already brought the function back in-house. This number of companies looking to outsource Assignment Management has increased from 8.2% in 2010 to 11.1% in 2011.

INTERESTING FACT:

The number of companies looking for outsourcing Assignment Management has increased from 8.2% in 2010 to 11.1% in 2011.

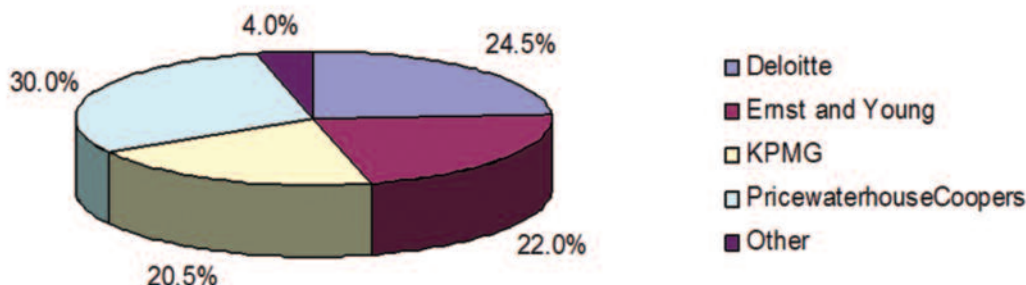
6. Market Share Analysis

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, Removal/Household Goods, Relocation/Destination Services, Technology, and Assignment/Vendor Management).

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

However, for FEM Members who are interested we can provide further data cuts based on size of assignee population, industry sector, headquarter location and much more. Do not hesitate to contact us if you would like more detailed information on how your organization stacks up against your comparator group.

Market Share- Tax



Top six service providers by market share	
1	PricewaterhouseCoopers
2	Deloitte
3	Ernst & Young
4	KPMG
5	BDO
	Grant Thornton

Tax

In terms of the market share of the tax firms, PricewaterhouseCoopers clearly seems to be leading with 30% market share, followed by Deloitte with 24.5%. Ernst & Young occupies 22% market share, closely followed by KPMG with 20.5%. Other firms in the business account for just about 4% market share.

Our analysis suggests that PwC and Deloitte appear to be growing fastest having recorded the highest proportions of new clients over the last 12 months.

INTERESTING FACTS:

- 1) Although the tax market is dominated by the Big Four, we are beginning to see some evidence of smaller firms making inroads, especially into the small programs category
- 2) PwC is the clear market leader with Deloitte in the number two position
- 3) For large programs, KPMG and Ernst & Young are clear market leaders

Interestingly however, when we look at the largest programs (over 1000 assignees) the market share results are dramatically different. KPMG are the market leader for large programs (30%) followed by Ernst & Young (26%), Deloitte (24%) and PwC (20%).

Immigration

The global market for Immigration services is dominated by Fragomen with a staggering 45% market share. Fragomen’s market share is greater than the rest of the top ten firms combined. Outside of Fragomen, the chasing pack of Emigra, BAL, PwC and Ernst & Young are almost the same size with approximately 8% market share each. Outside of the top ten, respondents reported using another 27 different firms, all of which have less than 1% each.

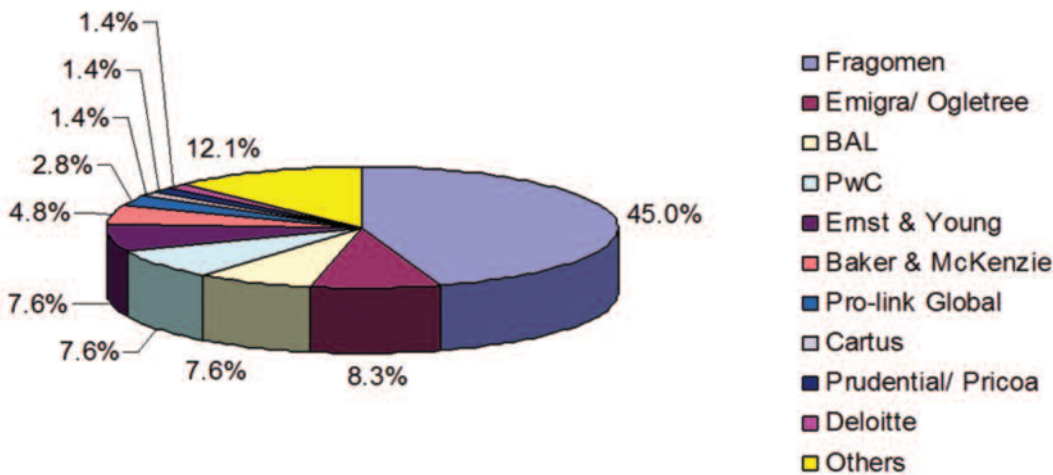
Other firms used by FEM members include:

Baker Tilly	J Allies and Co
BDO	James Cowper
Global Tax Network	Mayotte & Singer
Grant Thornton	Vacovic
Hewitt	

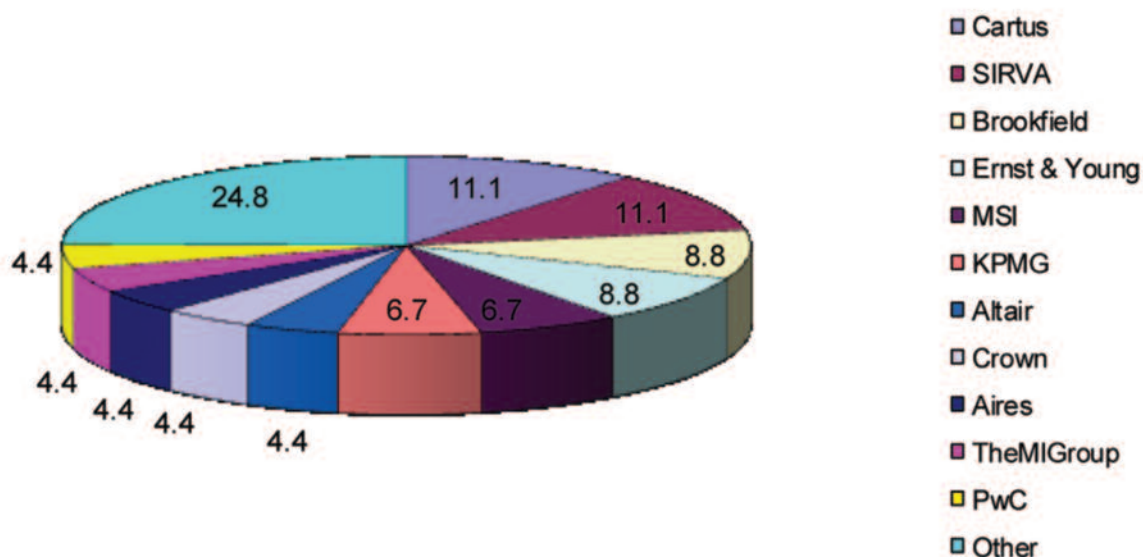
Top ten service providers by market share

1	Fragomen
2	Emigra/ Pgletree
3	BAL Ernst & Young PwC
6	Baker & McKenzie
7	Pro-link Global
8	Cartus
9	Prudential/ Pricoa
10	Deloitte

Market Share- Immigration



Market Share- Assignment/Vendor Management



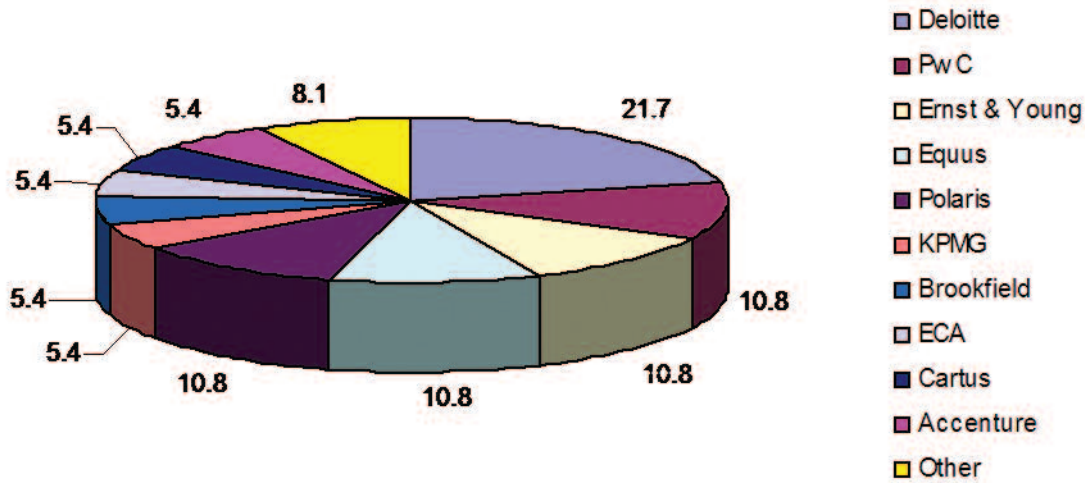
Assignment/Vendor Management

Cartus and SIRVA lead in the area of Assignment/Vendor Management, each has a market share of 11.1%. These two major companies are closely followed by Ernst & Young and Brookfield both with 8.8%. MSI and KPMG have a market share of 6.7%. Other companies who have made it to the top eleven list include Altair, Crown, Aires, TheMIGroup and PwC, all with a 4.4% share.

Top eleven service providers by market share

- 1 **Cartus**
- 2 **SIRVA**
- 3 **Brookfield**
- 4 **Ernst & Young**
- 5 **KPMG**
- 6 **MSI**
- 7 **AIReS**
Altair
Crown
PwC
TheMIGroup

Market Share- Technology



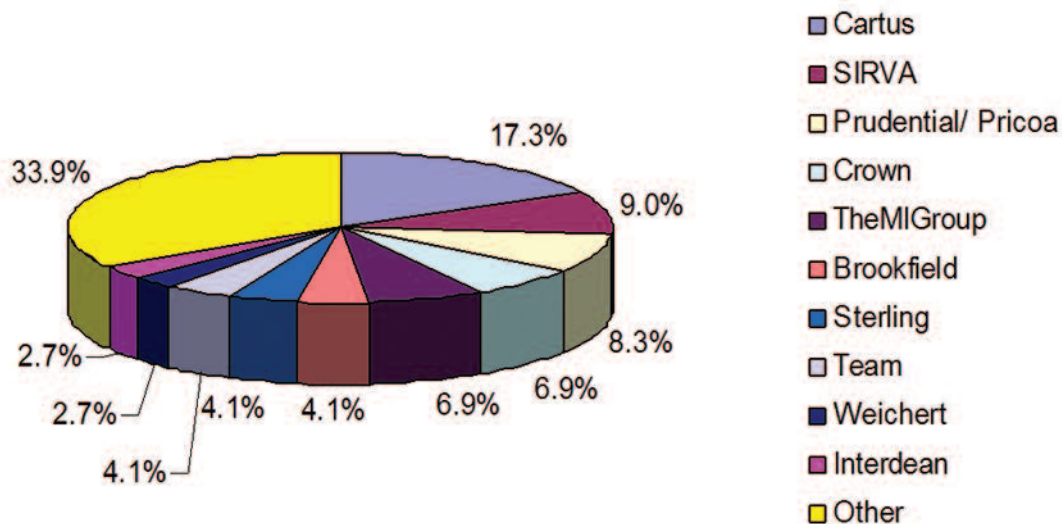
Technology

With a total of 21.7% market share, Deloitte is the clear market leader for Technology. PwC, EY, Equus and Polaris all have a significant share of 10.8%. KPMG, Brookfield, ECA, Cartus and Accenture have a smaller percentage share of 5.4%. All the other main companies in the category 'other', such as Hewitt, Interdean, Plus etc have a combined market share of 8.1%.

Top ten service providers by market share

1	Deloitte
2	PwC
3	Equus
4	Ernst & Young
5	Polaris
6	KPMG
7	Accenture
	Brookfield
	Cartus
	ECA

Market Share- Relocation Management/Destination Services



Relocation Management/Destination Services

Cartus is the clear market leader for Relocation Management/ Destination Services with 17.3% market share followed by SIRVA at 9%. Prudential/ Pricoa follows closely with 8.3%. Both Crown and TheMIGroup have a 6.9% share, followed by Brookfield, Sterling and Team Allied, all three having a 4.1% share. The last two of the top ten service providers in the field of Relocation Management/ Destination services are Weichert and Interdean both having a 2.7% market share. The rest of the service providers make up for the remaining 33.9% of the market.

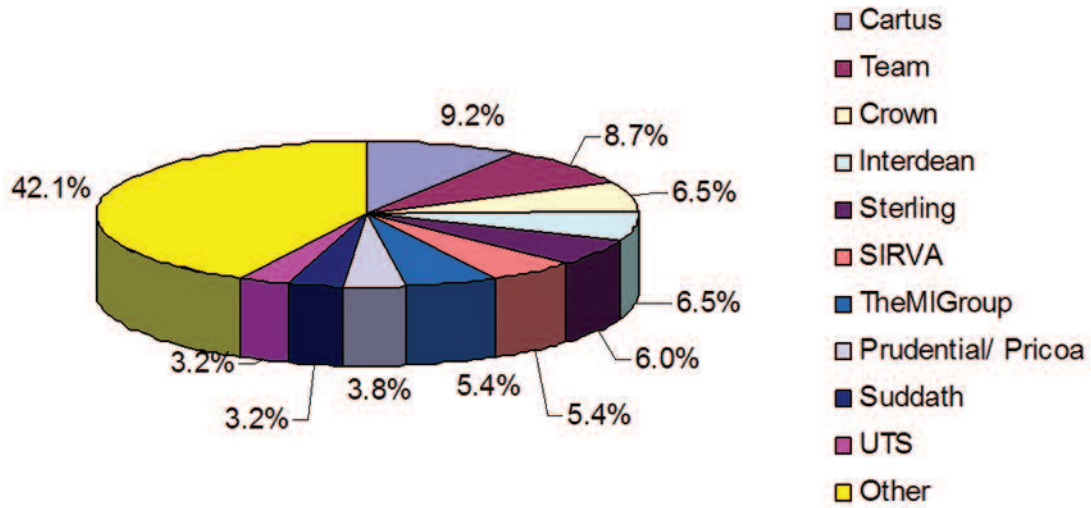
For large programs (over 1000 assignees), the market is much more consolidated with just five firms having 79% market share. The big 5 firms for relocation management for large programs are:

Crown	26%
Cartus	21%
Brookfield	11%
Prudential/Pricoa	11%
SIRVA	10%

Top ten service providers by market share

1	Cartus
2	SIRVA
3	Prudential/Pricoa
4	Crown
5	TheMIGroup
6	Brookfield
7	Sterling
8	Interdean
9	Weichert
10	Team

Market Share- Household Goods



Household Goods

Cartus leads the market for Household Goods Services with 9.2% market share, with Team (8.7%) following closely. Both Crown and Interdean have a 6.5% market share and Sterling follows with 6%. SIRVA and TheMIGroup have 5.4% market share each. Prudential/ Pricoa have a 3.8% share, followed by Suddath and UTS with 3.2% each. The rest of the firms make up the remaining 42.1%.

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

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

Top ten service providers by market share

1	Cartus
2	Team
3	Crown Interdean
5	Sterling
6	SIRVA
7	TheMIGroup
8	Prudential/ Pricoa
9	UTS
10	Suddath

7. Vendor Management

Vendor Management is one of the key challenges facing any global mobility professional (both corporate and service provider). In this section the way in which companies manage their service providers in the various business segments is analyzed. 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 business segment for example Relocation Management, Tax and etc.

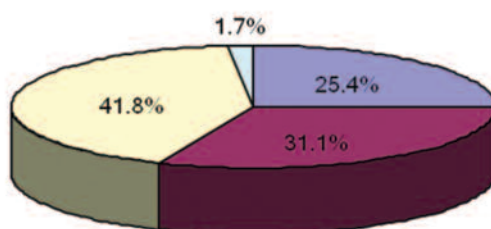
This section is based on the views respondents submitted on over 130 service providers. The responses in this section are aggregated but we can provide bespoke reports on request that will allow service providers the opportunity to benchmark performance against their peers. A full list of service providers mentioned by respondents is included at Appendix B.

When asked how the firms managed their vendor performance, the highest share (41.8%) of respondents said they did not conduct a formal survey but tended to rely on assignee 'noise' and

General Overview

How do companies monitor vendor performance?

Managing Vendor Performance



- We (ourselves) conduct a formal internal survey of assignee satisfaction
- We dont conduct a survey but our vendors carry them out for us
- We dont conduct a formal survey but tend primarily to rely on assignee "noise" and informal feedback
- We benchmark levels of vendor satisfaction against other similar corporations on a formal basis

informal feedback. 31.1% reported that their vendors conducted a survey for them. Only 25.4 % said they conduct a formal internal survey of assignee satisfaction. Perhaps surprisingly, only 1.7% said they formally benchmarked levels of vendor satisfaction against other similar corporations. This is a service that the FEM will be offering to member from 2012.

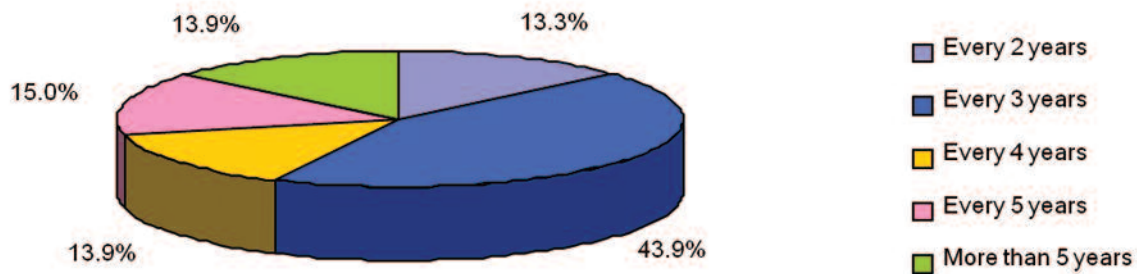
INTERESTING FACT:

A staggering 41.8% 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 this chart below.

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

Tendency to go out to formal RFP for the major vendors



INTERESTING FACT:

Surprisingly almost 14% of respondents have not been for RFP for 5 years or more. The majority of respondents (80%) go out for RFP between every 2 to 5 years. And the best practice seems to be every 3 years (nearly 45%)

Charts below show 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.

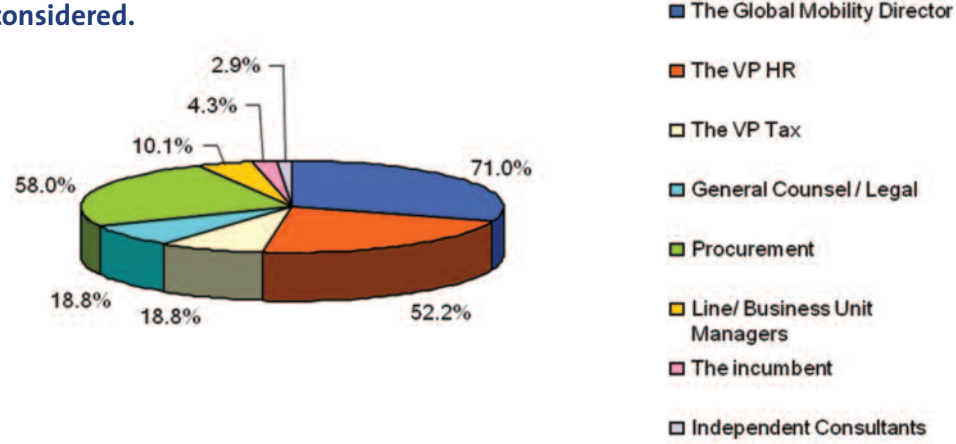
Detailed Analysis

Small Programs

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

For small programs the majority of respondents answered that the people most significantly involved in the process were the Global Mobility Directors (total of 71%), Procurement (58%) and VP HR (50%). The least involved people in the process were independent Consultants. Only around 10% of the participants reported Line and Business Unit Managers to be significantly involved in the process of going out to RFP for major vendors.

People significantly involved in the RFP process (small programs)



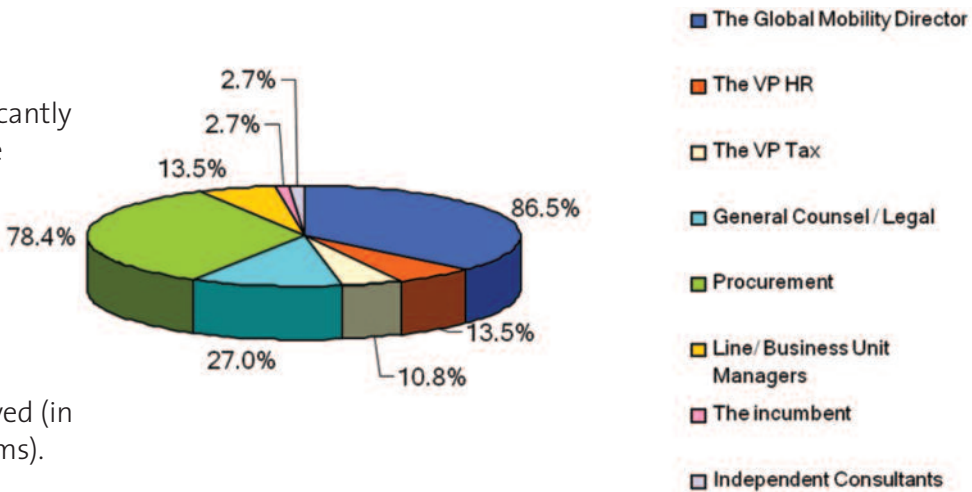
Large Programs

For large programs the most significantly involved people in the process, were the Global Mobility Directors and Procurement (86.5% and 78.4% respectively).

However, the VP HR seemed to play a far less important role in the process with only 13.5% being involved (in comparison to 50% in small programs).

Also, almost 30% of the respondents indicated that General Counsel/Legal department was significantly involved in the process – more than Line/Business Unit Managers, VP Tax or even VP HR.

People significantly involved in the process if going out to RFP (large programs)



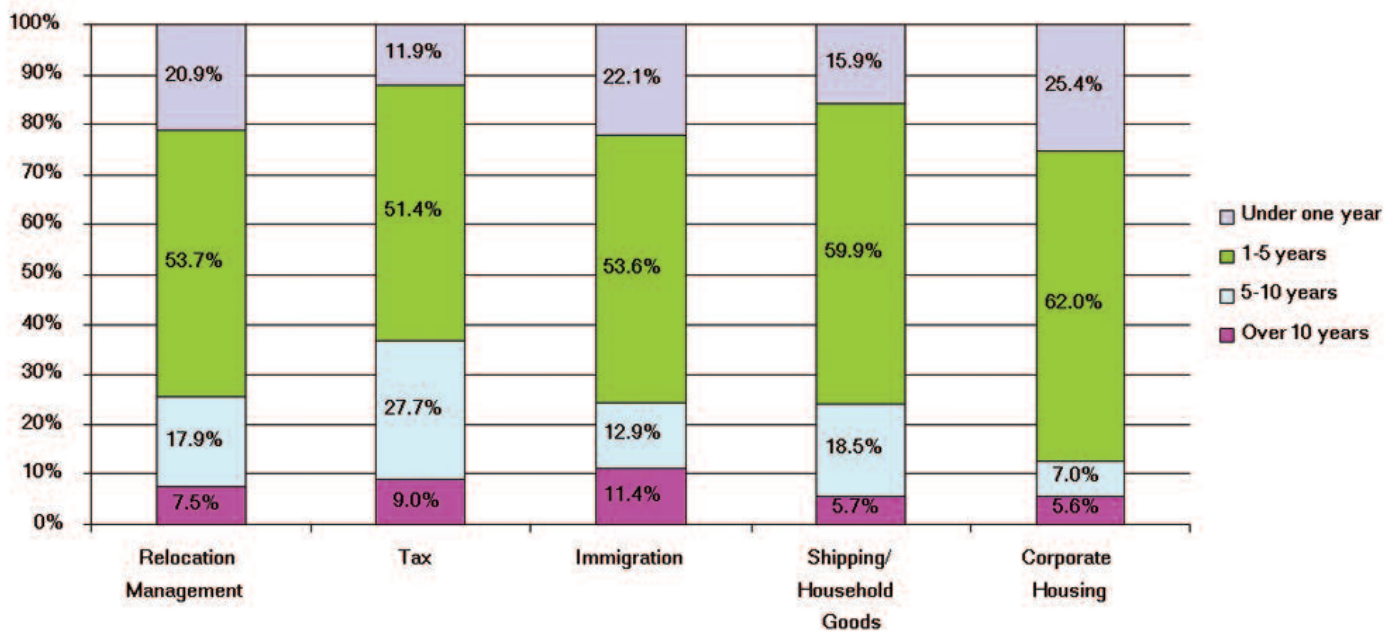
The study also investigated the frequency with which companies tend to switch their major service provider in five different categories: Relocation Management, Tax, Immigration, Shipping/Household Goods and Corporate Housing.

The best practice for each category seems to be between 1 to 5 years (with over 50% of respondents indicating this practice). The smallest percentage of responses was registered for companies who switch a major service provider over every 10 years (between 5%-10% for each category).

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. Corporate Housing providers are more often changed by companies than Tax providers (in the range of up to every 5 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 Immigration category (11.4%), followed by Tax (9%).

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



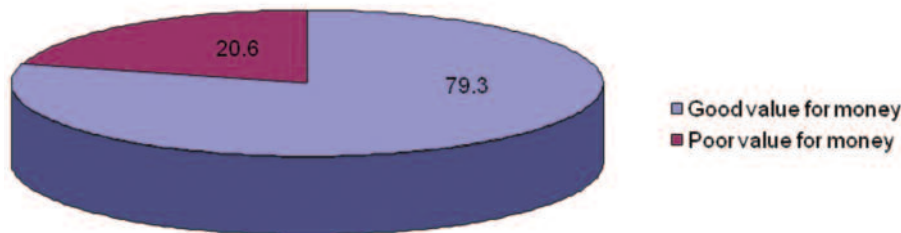
The median period of contract longevity is as follows:

Relocation Management	3 years 2 months	Shipping/Household Goods	3 years 3 months
Tax	3 years 1 month	Corporate Housing	2 years 7 months
Immigration	3 years 1 month		

INTERESTING FACT:

Companies tend to switch their major service provider more often for Corporate Housing and Shipping/Household Goods than for Tax and Immigration.

Value for Money



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.

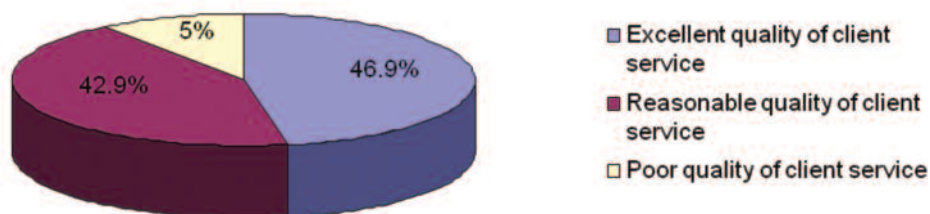
An overall evaluation of the results show that a majority of the respondents believed they received good value for money.

A detailed analysis shows that for large programs respondents rated their vendors for Relocation Management quite favorably. Around 80% of the respondents believed that that they received good value for money from their Relocation Management service providers whilst the rest of the respondents (20%) thought they received poor value for money. Findings from respondents in small programs showed no difference at all from those in large programs. Interestingly, results are identical for large and small programs in this respect.

In terms of service quality, 46.9% of respondents believed their vendors in the area of Relocation Management provided excellent quality of client service, 42.9% thought service quality was reasonable and 5% thought the service quality from their relocation management vendors was poor.

For large programs, it was revealed that only 9.2% of the survey respondents thought that their vendors provided poor quality service, 41.5% thought they were provided excellent quality of client service and the rest were reasonably satisfied (49.3%). For small programs, a total of 47.8% of the survey respondents rated their relocation management vendors as excellent and 39.1% thought they provided an average service quality. A smaller proportion of the respondents (13%) believe that their relocation management vendors provided poor quality service.

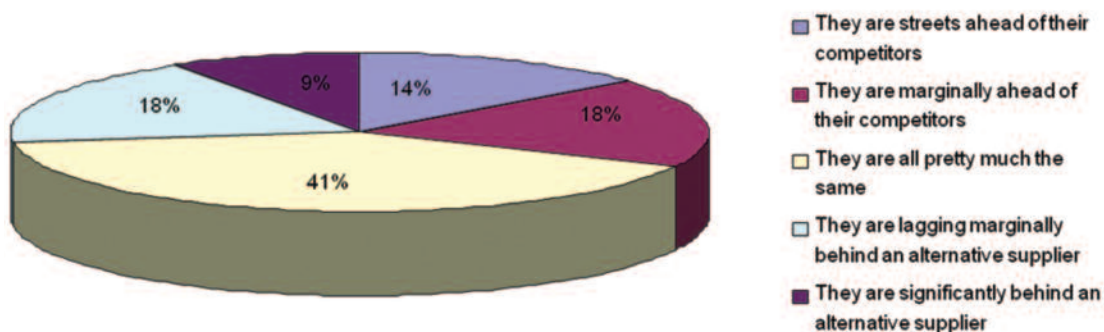
Quality of Service



INTERESTING FACT:

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

Level of Competence and Professionalism



When questioned about the level of competence and professionalism of their service providers, in the area of relocation management, 41% respondents said all the service providers in that industry are pretty much the same, 18% said their service provider is marginally ahead of its competitors and the same number of respondents (18%) said that their service provider is lagging marginally behind its competitors. A small proportion of respondents (14%) thought their service providers are streets ahead of their competitors and 9% said they are significantly behind an alternative supplier.

For large programs, the number of respondents saying that their relocation management vendors are only marginally ahead of its competitors was reported to 45%. 36% reported that their vendors were pretty much the same and 18% of the respondents thought that their vendors were lagging marginally behind.

For small programs, a majority of respondents thought their vendors are pretty much the same (43%), 17% reported their vendors were streets ahead of their competitors and the same number of respondents thought that their vendors were marginally ahead of their competitors.

A total of 17% thought there vendors were lagging behind and 6% believed their vendors were significantly behind an alternative supplier.

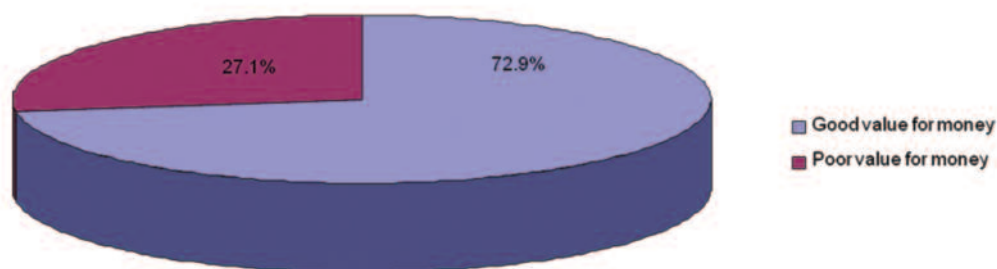
TAX

A significant proportion of respondents (72.9%) believed their tax providers gave them good value for money whilst 27.1% believed they received poor value for their money.

A detailed analysis showed that for large programs, a total of 68.2% of the respondents believed that the service they received from their Tax providers was worth what they were paying for whilst 31.7% believed that they received poor value for money.

For small programs, a higher proportion of the respondents believed that they received good value for money from their Tax providers (86.4%).

Value for Money

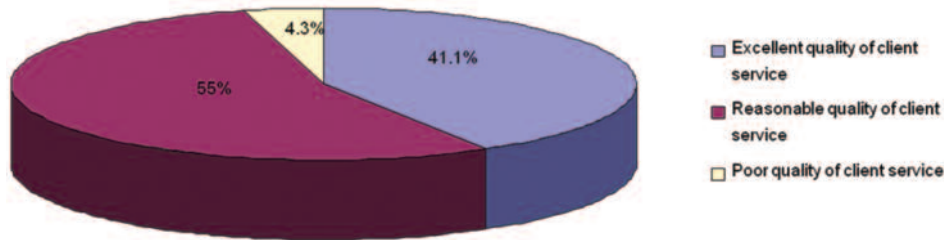


INTERESTING FACT:

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

INTERESTING FACT:

Respondents with large programs were more satisfied with their tax vendors in terms of their service quality than those with small programs.

Quality of Service

The service quality provided by Tax vendors is viewed as either excellent or reasonable by most of the respondents with only 4.3% thinking they received poor quality service.

For large programs, 41.1% of respondents thought that their tax vendors have provided excellent service quality, 53.4% thought that their tax providers delivered reasonable service quality whilst 5.5% believed that the quality of service was poor

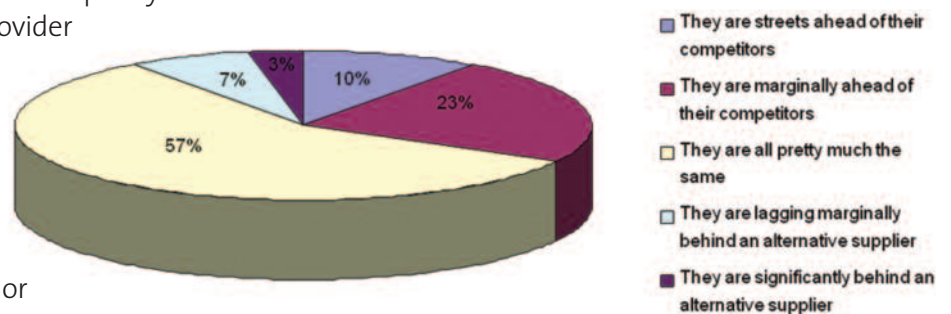
For small programs a total of 38.7% the respondents rated the service from their Tax providers as excellent, 51.8% said they were reasonably good and 9.6% of the survey participants thought that the quality of service from their tax providers was poor.

The respondents thought that in areas of technical competency and professionalism, their tax vendors were providing pretty much the same service quality (57%). A total of 23% felt their service provider was slightly ahead of its competitors and 7% thought their vendor was lagging slightly behind an alternative supplier. While 10% percent thought their service providers were streets ahead of their competitors, only 3% of the respondents thought their tax vendor

was significantly behind an alternative supplier.

An in-depth analysis shows that for large programs a clear majority (50%) of the respondents felt that all the tax service providers were pretty much the same whilst 13% felt their vendors were streets ahead of their competitors. 25% of the survey participants said that their service providers were lagging slightly behind their competitors

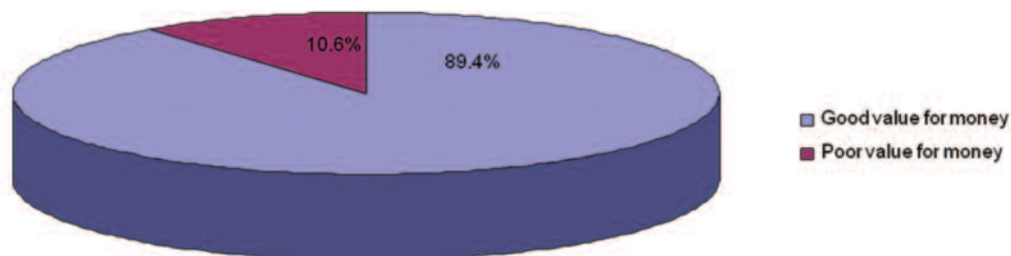
For small programs on the other hand, most of survey participants (61%) thought their tax service providers were all pretty much the same and 9% thought their vendors were streets ahead. 20% of the respondents thought their tax providers were marginally ahead of their competitors and 9% believed their vendors were streets ahead

Level of Competence and Professionalism**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.

IMMIGRATION

Value for Money



The majority of respondents (89.4%) believed that they received good value for money from their Immigration service providers. Only 10.6% thought this was not the case.

After an in-depth analysis between large and small programs it was observed that more respondents for large programs thought they received good value for money (93.3%) in comparison to respondents for small programs (89.6%); although the difference noted was not stark.

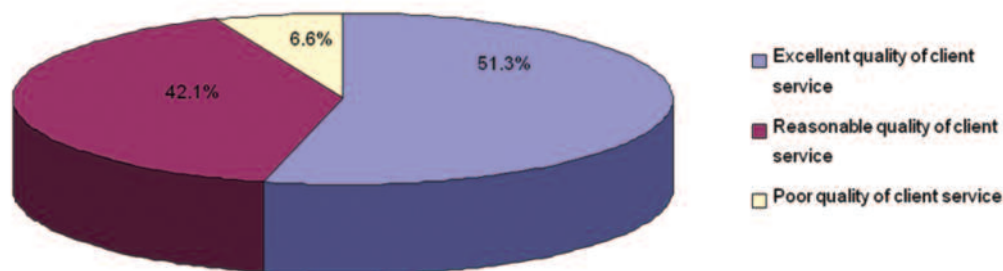
As for service quality, over 90% of respondents thought their immigration service providers delivered excellent to reasonably good service quality. Only 6.6% of the survey participants thought they received poor quality service.

For large programs, slightly more than half of the respondents believed that the service received from their vendors in the area of Immigration was excellent (51.3%), 42.1% believed that the quality of service was reasonably good whilst a small percentage thought that the quality of service was poor (6.6%).

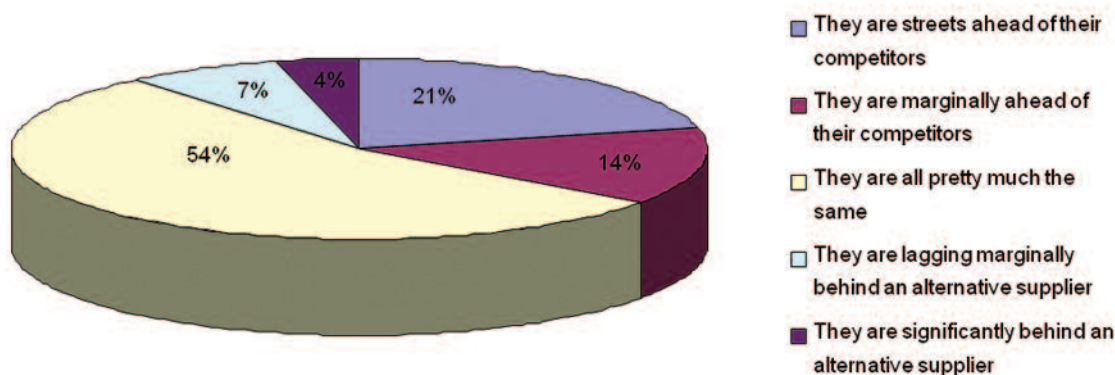
For small programs, a minority of respondents (7.5%) rated the service quality as poor whilst the rest thought the client service quality was either excellent or reasonable.

From these results, it is clear that the respondents most satisfied with their Immigration vendors belonged to large programs as they report the highest level of satisfaction and lowest level of dissatisfaction.

Quality of Service



Level of Competence and Professionalism



Respondents were also asked to rate their immigration vendors in areas of technical competence and professionalism. Overall results show that a clear majority of respondents (54%) said that all the service providers in this area were pretty much the same, 21% said that their service providers were streets ahead of their competitors, 14 % said that they believed their vendors to be marginally ahead of their competitors and 7% said they felt their service providers were lagging marginally behind an alternative supplier. Only 3% of the respondents felt that their service providers were significantly behind an alternative competitor.

A detailed analysis of our data showed that for large programs, the proportion of respondents saying that

their service providers were just the same as others in the business was approximately 33% and the same percentage of respondents felt that their vendors were marginally ahead of their competitors. 20% of the survey participants believed their vendors were streets ahead of their competitors.

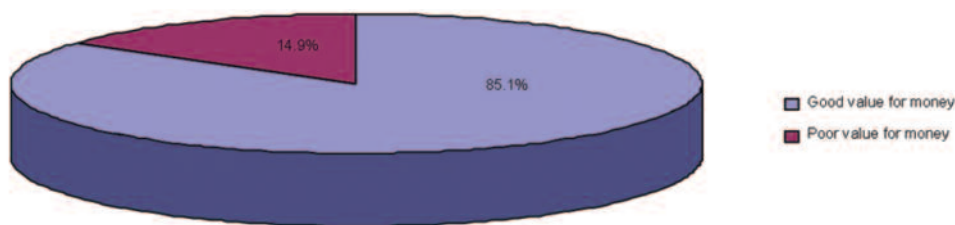
As for small programs a majority of the respondents thought that their service providers were pretty much the same (56%) and only 14% believing that their vendors were marginally ahead of their competitors.

HOUSEHOLD GOODS

Investigation of the data in the area of Shipping/Household Goods showed that a great majority of respondents were satisfied with the service providers and said they received good value for money (85.1%), while only 14.9% thought they received poor value for money.

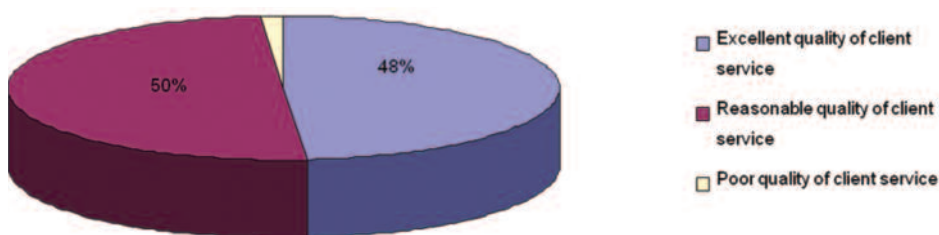
Similar proportions regarding value for money for the services provided were found for both small and large programs. Over 85% of the respondents for both large and small programs thought they received good value for money.

Value for Money



When questioned about the level of competence and professionalism from their service providers, 50% of all respondents said all the service providers in that industry are pretty much the same. Only 14% expressed the view that their principal service provider is streets ahead of their competitors, and 29% felt that their vendors were marginally ahead of their competitors. Only 7% claimed that their service provider was lagging marginally behind an alternative supplier.

Quality of Service



In terms of overall service quality in this field – 48.5% of respondents expressed their satisfaction, while 50% believed that they were provided reasonable quality of client service from their Household Goods providers and only 1.5% received poor quality of client service.

For small programs the proportion of respondents who believed they received excellent and reasonable quality of client service was equal (50% to 50%), with no single response expressing dissatisfaction in this area.

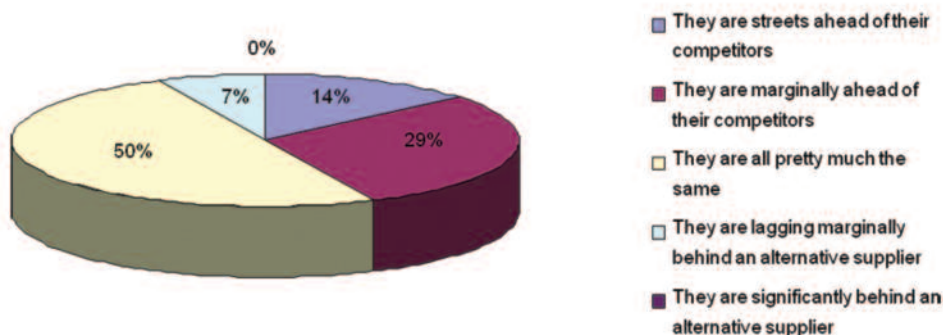
For large programs, results were only slightly different from small programs. 46.3% felt they obtained excellent quality of client service and 52.4% believed quality of client service was reasonable and only 1.3% of respondents claimed they received poor quality service.

For small programs 51% of the respondents thought their Household 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 (60%) said that all the service providers in the industry were pretty much the same. However, only 7% pointed out that their service providers were far better than their competitors. Finally, 7% believed that their principal service provider was significantly behind an alternative supplier.

Level of Competence and Professionalism



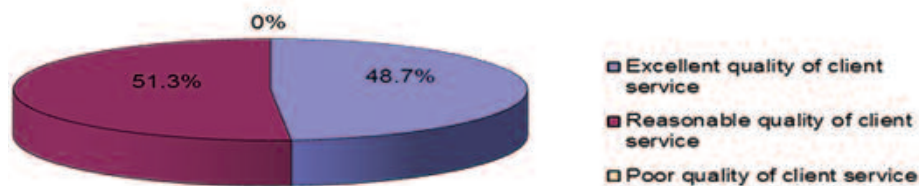
CORPORATE HOUSING

In the area of Corporate Housing, 91.4% of respondents believed that they received good value for money, which shows overall satisfaction with their service providers. Only 8.6% of respondents were dissatisfied with their vendors for Corporate Housing.

For large programs, over 80% of the respondents thought they received good value for money whilst for small programs, over 90% of the survey participants thought they received good value for money.

Results show that vendors in the area of Corporate Housing are generally perceived as providing excellent or at least reasonable quality of client service. None of the respondents expressed dissatisfaction in terms of service quality in that particular business segment which is quite impressive.

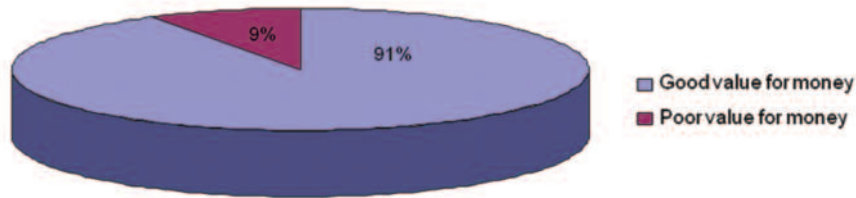
Quality of Service



Similar proportions regarding value for money for the services provided were found for both small and large programs.

In terms of competence and professionalism there was an equal number of respondents who stated that their service providers were streets ahead of their competitors and those who were lagging behind an alternative supplier (17% respectively). A high number of responses (44%) was registered for service providers who were

Value for Money



thought to be all pretty much the same. 22% of the respondents felt that their vendors were marginally ahead of their competitors.

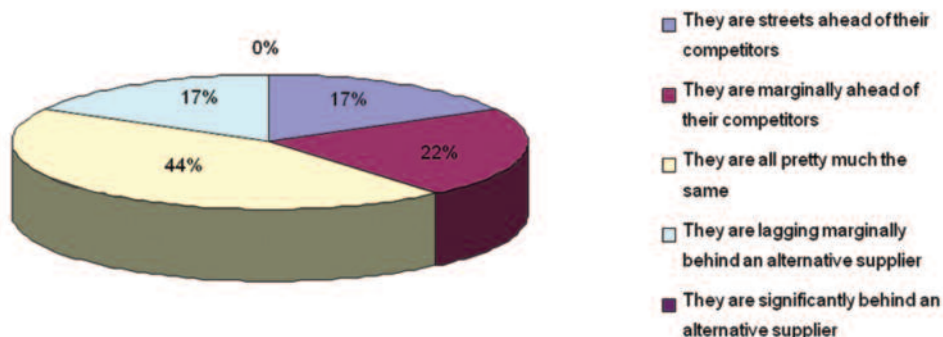
For small program only 14% claimed that their service providers are streets ahead of their competitors. 27% of respondents thought that their vendors were lagging marginally ahead of an alternative supplier. 45% thought that they are all pretty much the same and 14% respondents believed that their suppliers were significantly behind an alternative supplier.

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

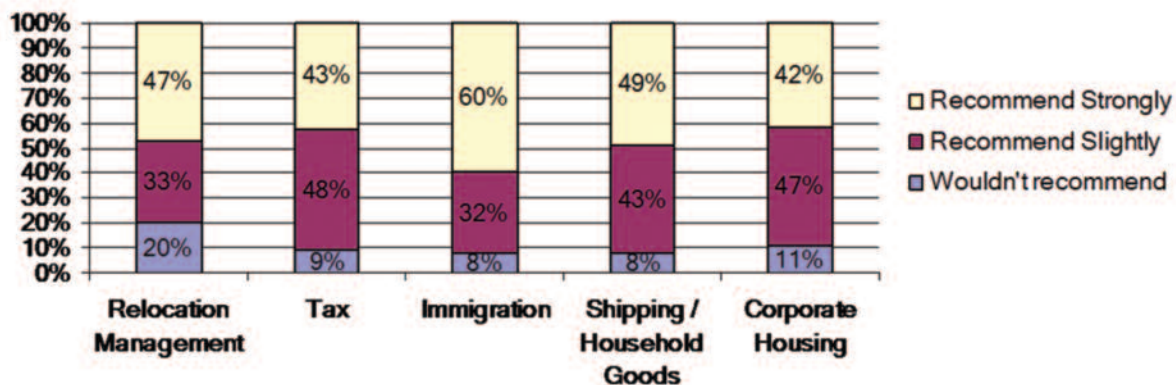
competitors. Also, no one believed their vendors were significantly behind an alternative supplier. All the responses were divided between those who claimed that suppliers are all pretty much the same

(64%) and those who were marginally ahead of their competitors (36%).

Level of Competence and Professionalism



Recommendation of service providers



The respondents were asked about the likelihood of them recommending their current service providers to friends in another organization. 47% of the respondents said they would strongly recommend their Relocation Management service providers, 33% said they would slightly recommend them and 20% said they would not recommend them to others.

In the area of Tax, 48% of the organizations said that they would only slightly recommend their service providers in the field of tax, while 43% of them said they would strongly recommend them and only 9% said they would not recommend them to others.

A total of 60% of the service providers in the field of immigration were likely to be recommended by the

respondents, 32% of them are likely to be slightly recommended and only 8% of them are not likely to be recommended to others.

In the area of Household Goods, 49% of the respondents said they would strongly recommend their service providers, 43% said they would slightly recommend them to others and only 8% said they would not recommend them at all.

In the field of Corporate Housing, 47% of the respondents they would only slightly recommend their service providers, 42% of them said they would strongly recommend them and only 11% said they would not recommend their Corporate Housing Service providers to others.

INTERESTING FACT:

Immigration is the area where respondents are most likely to recommend their service provider. Relocation Management is the least likely to be recommended

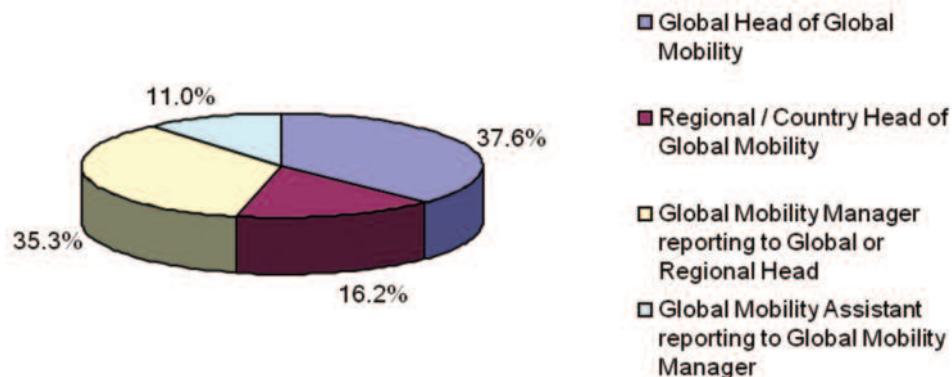
8. The Global Mobility Professional's Profile

The final section of the survey asked respondents questions about their job role. Our respondents are professionals in the Global Mobility sector (with 3/4 of them being Global Heads of Mobility or Global Mobility Managers). The present section intends to investigate their professional profile from the point of view of their experience in the field, tenure, education and qualification held, as well as their next career move. Also, we determine the Caseload

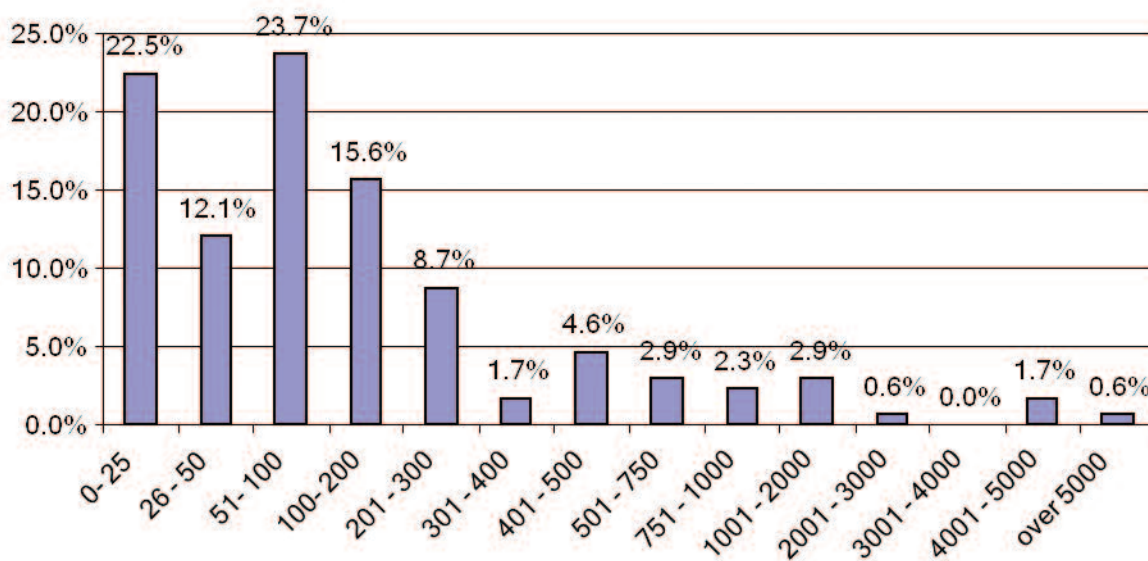
Ratio (ratio of assignees per GM Professional) for various programs (from small to large ones).

A high number of respondents were Global Heads of Global Mobility (37.6%), with a further 35.3% being Global Mobility Managers. 16.2% were Regional/Country Heads of Global Mobility and 11% were Global Mobility Assistants.

Job role of survey respondents



Number of Assignees Managed by Global Mobility Professional



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.

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 moves per annum is possibly a much more important metric than the overall level of assignee numbers.

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

In the case of small programs (under 100 assignees), we have observed that the median Caseload Ratio was 48 per head. This means that around 50% of the small sized programs had 1 professional handling its entire global mobility population which was around 48 people.

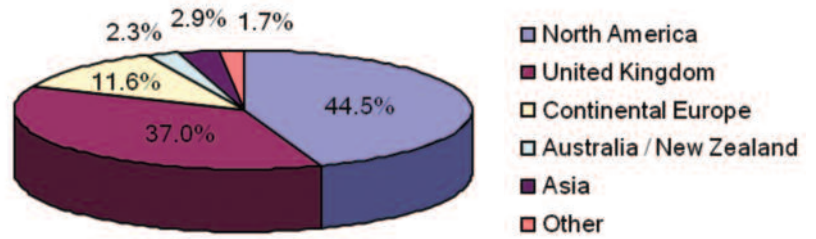
For larger programs (over 1000 assignees), the median Caseload Ratio seems to be 60 per head. This means that 50% of the large sized programs had 1 global mobility professional handling around 60 assignees suggesting that large programs clearly operate on economies of scale.

Respondents were also asked where they were located.

Results from the survey indicate that a majority of the respondents were located in North America (49.3%). The survey results also show that 37% of the respondents were based in the UK and 11.6% in Continental Europe. Only 2.9% of the respondents were located in Australia, 2.3% were based in Asia and a very small number of respondents, with a percentage of 1.7%, represented the 'Other' category.

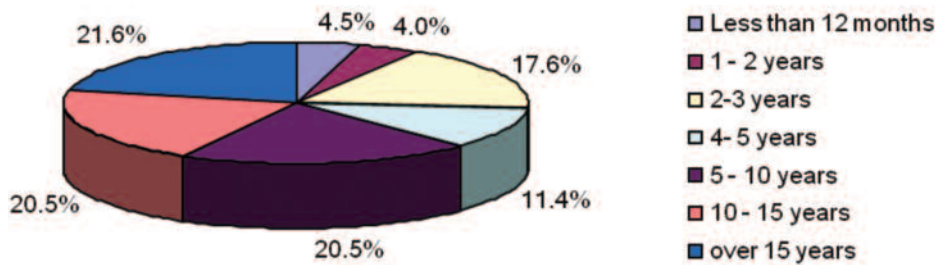
In addition to their location, the respondents were asked questions regarding their experience in the Global Mobility arena and their professional qualifications and educational achievements.

Location of Global Mobility Professionals



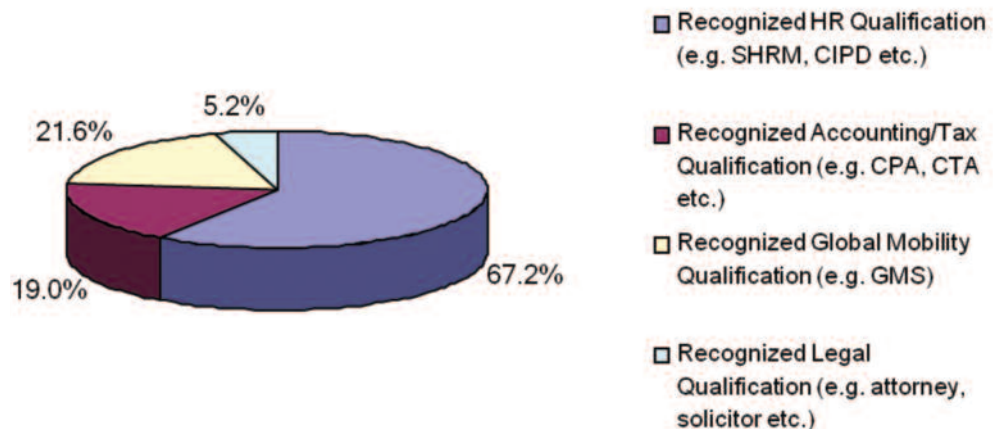
As the results show, 21.6% of the respondents have over 15 years of experience. A total of 41% of the respondents have between 5-15 years of experience in Global Mobility. Nearly one third of the respondents have up to 5 years of experience (33%) and 4.5% have less than 12 months experience.

Amount of Experience in Global Mobility



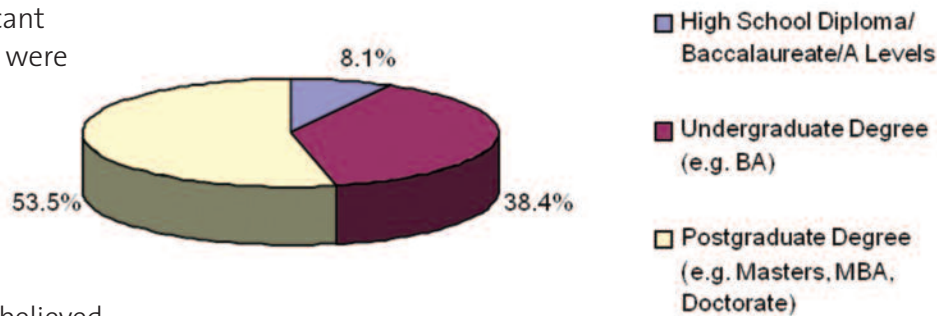
In addition, a significant majority of respondents have a recognized HR qualification (67.2%) whilst 19% have a recognized Accounting or Tax qualification. Around 21% of the overall respondents have a Global Mobility qualification and only 9.5% have a recognized legal qualification.

Professional Qualifications Held by Respondents



Another finding of this study revealed that more than half of the respondents (53.5%) had a postgraduate qualification. A significant proportion of our respondents (38.4%) were undergraduates and only 11% did not possess a degree.

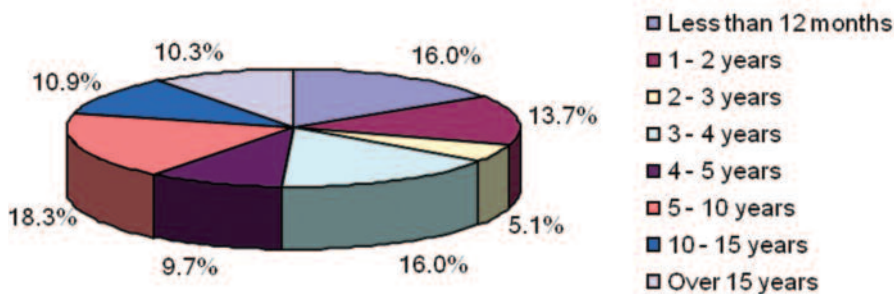
Level of Educational Achievement



The final questions asked respondents to comment on how many years they have worked for their current employer and what they believed to be their next position/promotion. These results are shown in the next charts.

A quarter of respondents reported that their next move would be a Global Mobility role in another company (25%), although a significant number of respondents answered that their next move would be to aim for an upward career movement within their current employer's Global Mobility Team (20%).

Tenure with current employer

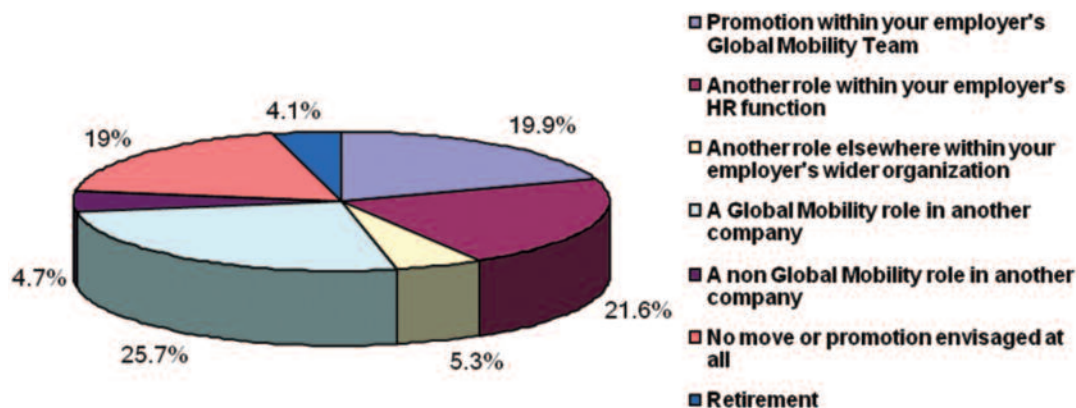


Approximately 10% of the respondents have been with their current employer for over 15 years and a significant number have been in employment with their current employer for 5-15 years (nearly 30%). A large majority representing 44.5% of our survey respondents have been with their current employer for 1-5 years and a total of 16% have been with their organization for less than 12 months.

A further 20% of respondents stated that their next move would be another role in the HR function, with an additional 5% suggesting a move to another role elsewhere in their current employer's organization.

Some respondents reported that they did not envisage a move or promotion (19%), whilst others reported that their next move would be a non-Global Mobility role 5%. A total of 4% believe their next move would be retirement.

Next move for survey respondents



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 and market shares. The report aims at presenting the essence of the information shared by the FEM members. This is key information that they use to contemplate and

compare policies and practices in the area of Global Mobility, improving their own approaches in the process.

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 2011

Appendix A

List of survey participants

AB InBev	BP	Elsevier, Inc.
AB Volvo	Bridge	Ensco
Abbott Laboratories	British American Tobacco	Ericsson
Accenture	Brown-Forman Beverages	Ernst & Young Global
ADM	Bunge Limited	Estee Lauder Companies
AES Corp	Cable&Wireless Worldwide	Expedia
Airbus Americas	Capgemini	Experian
Akamai Technologies	Carl Zeiss	F Hoffmann-La Roche
Akzo Nobel	Carphone Warehouse	FedEx Express
Alcatel Lucent	CB&I	Fidelity Information Services
Alliance Boots	Celerant Consulting	Fidelity National Information Services
AllianceBernstein L. P.	Centrica	FIL Investment Management
Altegrity	CfBT Education Trust	Fiserv
AMEC	CGI Technologies and Solutions	Flash Networks
AREVA	CH2M HILL	Foot Locker, Inc.
ARINC Incorporated	Chevron	Franklin Templeton Investments
ARUP	CIPD	Fujitsu
Atkins	Cisco	Gamesa Technology Corporation
Atos Origin	Clarks	GE Healthcare
Avery Dennison	Clifford Chance	General Motors Company
Aviva Europe	Confidential	Genzyme Corporation
Awty International School	Covance	Grant Thornton
B. Braun Melsungen	Credit Suisse	Heineken International
BAE Systems	CSC	Henderson Group Plc
Bain & Company	Cubiks	Hershey Company
Baker & McKenzie	Danaher-Water Quality Group	Hess Corp
Baker Hughes	Dannon Company	Hilton Worldwide
Balfour Beatty	DASA International Movers	Holcim
Bank of America Merrill Lynch	De Beers	Honda Motor Europe
Barry Callebaut	Deloitte	HSBC
Baxter	Deutsche Bank	Hughes Network Systems
BBC	Diageo	Hunt Consolidated
Best Buy Europe	Dicello	ICAP-Columbia University
Betfair	Discovery Communications	Infineon Technologies
BG Group	Diversey, Inc.	Ingersoll Rand
Bill & Melinda Gates Foundation	DLA Piper	Integra Global
Black & Veatch	Duke CE	International Personal Finance
BlackRock	Dunnhumby	International SOS
BMS	Dyson	Intertrust Group
BNP Paribas	E.ON	ITT Corporation
BNY Mellon	EC Harris	J C Bamford
Boeing Company	Ecolab Inc.	JDA Software
Boston Consulting Group	Electronic Arts	JNTC Resources

John Holland Group	Prudential plc	Westpac Banking Group
Johnson Controls	PTC	Weyerhaeuser
Kantar Group	QinetiQ	Whirlpool
KBR	Rabobank International	Whitbread
Kellogg Company	Raytheon International	White & Case
KPMG	RealFoundations	William J. Clinton Foundation
Kraft Foods	Russell Investments	Xchanging
Lanxess	RWE npower	Yara International
Lenovo	SAIC	Zimmer Inc.
Linklaters	Saint Jude Medical	
Lloyds Banking Group	Saint-Gobain Corporation	
Lockheed Martin	Schneider Electric	
Logica	Scotiabank Group	
Lufthansa	Serco Group	
Maersk Oil	SGS Management Services	
Manitowoc Company	Shaw Group	
Mars, Incorporated	Silicon Valley Bank	
Mayer Brown International	Skype	
MBDA	Smiths	
McGraw-Hill	Sonata Software	
Milbank	Sony Corporation	
Molex Incorporated	Sony Pictures Entertainment	
Momentive	Standard Chartered	
Moog Inc.	Statoil	
Morgan Stanley	Steelcase	
Mubadala Oil and Gas	SThree	
Mustang Engineering	SunGard	
National Grid	Superior Energy Services	
Navistar	Taboola	
Newedge Group	Telefónica Europe	
Nexen Inc	Tessengerlo Group	
Nielsen	Tetra Pak	
Nomura	Travelers Companies, Inc.	
Northern Trust	Tiffany & Co.	
Northrop Grumman	TJX	
Norton Rose	TNT Express	
Novartis	Tower International, Inc.	
NS - Dutch Railways	TUI Travel	
NYSE Euronext	Turner International	
Old Mutual	Tyco International	
Oracle	Unilever	
Oshkosh Corporation	Unisa	
Parex Resources Inc.	UPS	
PAREXEL International	Veolia Environment	
Pearson	Vinson & Elkins	
PepsiCo, Inc.	Waggener Edstrom Worldwide	
Polymer Group, Inc.	Welch Allyn	
Providium	Western Digital	

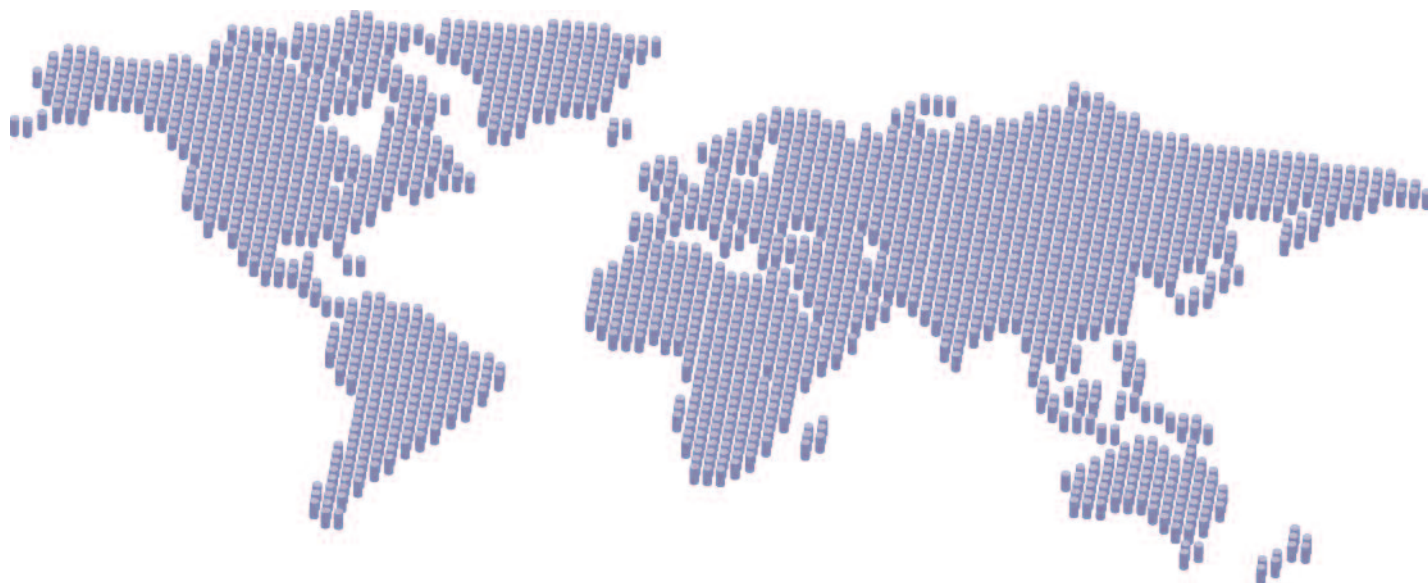
Appendix B

List of Service Providers

ACS	Eversheds	Newland Chase
Accenture	Expaticore	North American Van Lines
ADP	Fragomen	Northgate Arinso
AGS	Gherson	Nova relocations
AIRES	Global Tax Network	NuCompass Mobility
Alfa Quality Moving	Graebel	Ogletree Deakins (Emigra)
Allied Pickfords	Grant Thornton	Orientations
Altair	HCR	PackImpex
Argy, Wiltse & Robinson	Hewitt	Pasha
Arpin Van Lines	Hunton & Williams	Patersons
ASG Immigration	ICM Gerson	Pickfords
Asian Tigers	Icon relocation	PLUS Relocation
Atlas	ICU Net	Polaris
Baker Tilly	InterConex	PricewaterhouseCoopers
Baker & McKenzie	Interdean	Pricoa
BDO	International Personnel Management	Pro-Link Global
Berry Appleman & Leiden	IOR	Proskauer
Birketts	IRM	Providium
Brookfield GRS	Ivener & Fullmer	Prudential Relocation
Buchanan Ingersoll & Rooney PC	J Allis and Co	Relocation Today
Cadogan Tate	Jackson Hertzogs	Robinson & Cole
Cameron McKenna	James Cowper	Santa Fe
Capita	Jones Kelleher & Associates	Seyfarth Shaw
Cartus	K2 Moving Systems	Shepell
Celergo	Kempster, Keller & Lenz-Calvo	SIRVA
Ceridien	Kingsley Napley	Smith Stone Walters
Champion	KPMG	Speechly Bircham
Chin & Curtis	Landwell	Sterling Relocation
Clearview	Lewis Silkin	Stewart Harvey Woodbridge
Colligan	Lexicon Relocation	Suddath
Confern	Littler	TEAM Allied
Continuum International	Lumessi	Team Relocations
Crown Relocation	Mary Ryan	TheMIGroup
Darryl Flood	Mayotte & Singer	Toll Transitions
Davies Turner	Mobeltransport Denmark	Touch
Defintive Immigration Solutions	Mobility Services International	Touchdown Relocation Services
Deloitte	Moore Stephens	TRC Global Services
Dwellworks	Morgan Lewis	UTS
DWI	MoveOne	Vacovic
Egan	Movers International	Voerman
Emigra	MoveTrek	Von Paris
EMS	Nedvan	Weichert (WRRl)
Equus Software	NEI Global Relocation	Zulkie Partners
Ernst & Young	New World Van Lines	

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.

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