

MANAGING THE GLOBAL MOBILITY FUNCTION

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INTRODUCTION



Claire Tennant-Scull
Global Head of Content & Events Director
Forum for Expatriate Management

Welcome to the Forum for Expatriate Management's ninth annual *Managing the Global Mobility Function* report. Last year, mindful that our members' workloads do not get any lighter, we revised and shortened the survey and we have done the same this time. However, though the survey is briefer than its early versions, we have kept the focus on the same key issues, and retained many of the questions in the same format as the previous year so that we could make a reasonable comparison with 2017 and 2016.

This report is compiled from the results of the survey, which was completed by 168 individual senior global mobility professionals worldwide. The aim here is to offer a snapshot of the industry – and to offer some useful insights into current practice.

In 2016, the expectation was that global mobility teams would continue to grow in size and influence, and that the number of assignments would also increase to keep pace with what then seemed to be the unstoppable force of globalisation. However, 2017's results revealed a rather different emerging pattern – and again, this year's report throws up a number of surprises and much of what looked like an industry trend 12-months ago, now seems to have altered its course again.

We do hope that you find this a useful and interesting read. FEM would like to thank all those who took part in the survey – and, of course, the report's sponsors, Aon, Alliot Group and Oakwood.

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EXECUTIVE SUMMARY

For two years running now, we have streamlined the number and length of the questions we ask in the MGMF survey, but in order to be able to make useful comparisons, we have essentially asked about the same key issues. Of course, we have many respondents who take part every year, but we also have new ones too and so while we cannot claim these results to be like for like, they do give a snapshot of the industry.

Our thanks to our sponsors: Alliot Group, Aon and Oakwood and all those who took part in the survey.

The key findings of our survey:

Defining roles:

- The profile of this year's MGMF survey respondents appears to reflect a continuing trend from 2016 and 2017 for there to be a slight decline in the number of Global Heads of Global Mobility and slight increase in those who are a Regional Head.
- Of those who indicated that their title was 'other' than those listed, the majority identified themselves as consultants, specialists or advisers, mirroring wider employment trends.
- Other roles listed by those who selected 'other' have slightly differing titles but report to the following functions (in relative order): Compensation and Benefits, Tax, Reward, Immigration, Payroll, Finance.

Company headquarters:

- Most striking here were the fluctuations in the figures for North

America which showed that in 2016, 46% of the companies that responded were headquartered there, while in 2017 that figure had dropped to 29.5%. Now, in 2018, the percentage is back up to 41%.

- The number of companies based in Continental Europe has increased from 2017 and has dropped slightly in the UK (perhaps as a result of the uncertainty over Brexit).
- The share of participants based in Australia and New Zealand and Asia has decreased (9% combined compared with 25% in 2017).

Industry sectors:

- This needs to be qualified, but there is a striking difference between the leading industry in 2017 (banking and financial services – 22.3%) and this year: Technology, IT and telecommunications (21.7%) followed by 'Other' (15.1%) which includes sectors such as engineering, automotive, consumer goods and defence.
- Professional services show a slight increase from 13.3% in 2017 to 14.5% in 2018.
- Respondents from the energy, oil and gas sector have declined slightly this year, from 12.1% in 2017 to 11.2% in 2018 while those in manufacturing have slightly increased from 10.8% in 2017 to 11.2% in 2018.

Global mobility structure and reporting:

- This set of results revealed a really startling turnaround from 2016 and 2017. Just 27.8% reported to HR in

2016 and 23.3% in 2017, in 2018 the percentage is 46.9%.

- In 2016, most global mobility professionals who responded to the MGMF survey reported to Compensation & Benefits/Reward (43.1% in 2016 and 45.3% in 2017).
- There has also been a slight increase in those reporting to Talent Management (11% in 2018 compared with 8.8% in 2017 and 8.3% in 2016).

Centralisation versus regionalisation:

- In 2017, most thought Global Mobility should report to Compensation and Benefits/Reward (38.5%) with just 26.2% selecting HR as Global Mobility's most suitable home.
- In 2018, however, although Compensation and Benefits/Reward is still chosen by 37.2% of the respondents, HR is now the clear favourite at 46.2%.
- This year's answers indicate a clear pattern of decentralisation. In 2016, respondents reported that 42% of them were centrally located in one location, whereas in 2017, that figure had dropped to 38.5% and has decreased slightly again to 36.8% in 2018.
- There's a slightly fluctuating but steady increase in those who are centrally managed but in many locations (14% in 2016, 22.4% in 2017 and now 20.8%).
- Central centres of excellence with regional hubs seem to have increased from 16.7% in 2017 to 21.5% in 2018.

Team size and resourcing:

- In 2016 just over 20% of respondents

had between just one and five people in the team. By 2017 that figure was as high as 54.7%, but this has now lowered to 45.5%.

- In our 2016 results, the number of people who felt that Global Mobility was properly resourced was 59.2%, but by 2017 that had dropped to 51.3%. This time, in 2018, the percentage has risen again to 55.7%.
- Those who think it is under-resourced has barely changed since 2017 when it was 43.5%.
- Most who thought the function was properly resourced, included a proviso that it is presently adequate because they operate a small programme and that should the assignee population increase, they would need more resources.
- There were also some anxieties that outsourcing would not be a sustainable model if the mobile population increased and that there was not enough in-house expertise.
- Managing business travel and increasingly complex immigration regulations also appeared to demand more attention which impact adversely on other GM duties.

Number and types of assignments:

- While organisations with small programmes of 50 assignees or fewer now appear to account for a smaller percentage here, those with populations over 2,000 have increased to 15% in this set of responses compared with 10.7% in 2017. Before concluding that mobility programs are expanding, however, it is important to note that a significant number of the organisations taking part have been through an M&A process.
- The percentage of long-term assignees among our respondents in 2016 and 2017 was 44.01%, but this time, the figure has dropped to 38%.
- Short term assignments have gone up from 23% in 2017 to 29.7% in 2018.
- Extended business travel has grown from 16.6% in 2017 to 21.5% in 2018.
- Commuter assignments decreased from 18% in 2017 to 16.9% in 2018.
- Perhaps most strikingly, foreign local

hire policy has increased from 16.47% in 2017 to 23.6% this time and local transfers have similarly risen from 29.57% last year to 33.4%.

- In a new question for the survey, we asked whether organisations had carried out a policy review in the last 12 months or were planning to. More than half of respondents (54.7%) have done so, and another 24.5% intend to do so in the next year.

Outsourced services and specialisms:

- The percentage of respondents' organisations outsourcing key services such as tax and immigration has barely altered, but payroll has changed dramatically: only 3.6% outsourced payroll in 2017, but this year, respondents report that 23% now do it.
- Conversely, the percentage outsourcing business travel management has almost halved since 2017 when it accounted for 51.1%, but is now just 25.9%.
- While there is some appetite for changing providers for tax (19.1%) and immigration (19.1%) and relocation/destination services (20.9%), this has barely changed from 2017. Overall, most seem reluctant to move (48.2%) which continues the trend from last year (52%).

Managing vendor performance:

- On the question of evaluating vendor performance, between 2016 and 2017 the trend appeared to be towards an informal approach. In 2017, 43% said that they didn't conduct a formal survey. In 2018 only 28.6% choose

that route. Formal surveys are being conducted by 34.9% now, compared with 26.6% in 2017.

Formal RFPs:

- The most common time to change vendors remains at three years.
- Although the Global Mobility Director is still most often involved in such decisions at 75.6%, the involvement of procurement has increased from 58.4% in 2017 to 65.9%.
- HR's say seems to have decreased from 44% last year to 34.1%, and legal counsel have increased their influence from 20.8% in 2017 to 30.9% – perhaps because of GDPR.
- For those looking to go to RFP in the next 12 months, tax at 25.9% is top of the list of services, with immigration at 18.8% and relocation/destination services at 18.8%, but these figures have barely changed in last two years.
- There is an increase in the percentage reviewing technology services: in 2017, 8.6% planned to go out to RFP in the following 12 months. This year it's 12.5%.

Responding to global change:

- This year, 10.3% reported that geo-political changes have affected them to a great extent, 42.9% to some extent, 22.2% to a minor extent, and 24.6% not at all.
- At first glance it would appear that there has been less impact, but this year, we also asked for more detail. You can find a sample of the responses in the main body of the report, but overall, Brexit and changes in US immigration were the reasons cited most often.



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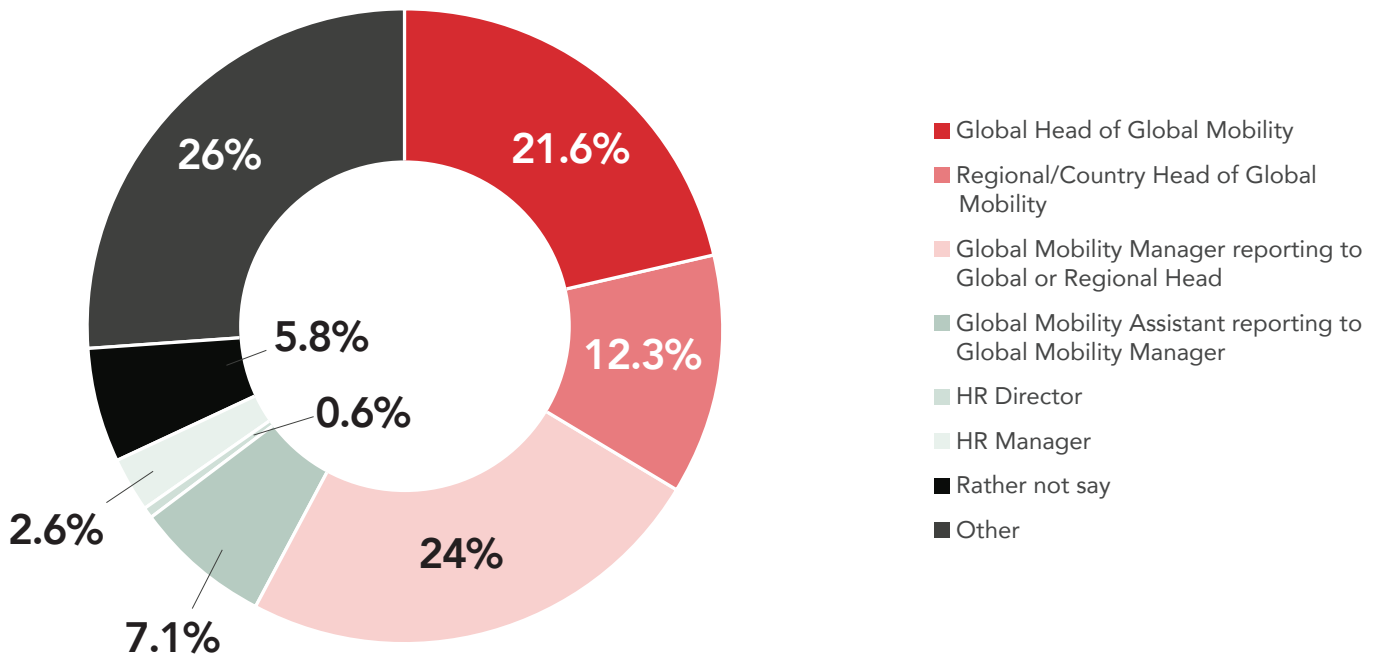


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PARTICIPANT DEMOGRAPHICS

This section sets out the demographics of the survey population, including the participants' job title, headquarters location and industry sector.

Which of the following most accurately corresponds to your role?



The profile of this year's MGMF survey respondents appears to reflect a continuing trend from 2016 and 2017 for there to be a slight decline in the number of Global Heads of Global Mobility and slight increase in those who are a Regional Head – which reinforces some of the findings further on in the report where we ask about decentralisation.

Of those who indicated that their title was 'other' than those listed,

the majority identified themselves as consultants, specialists or advisers, which mirrors wider employment trends towards more self-employed or contract workers. This may be a reflection of the continuing emphasis on departments keeping down costs and growth and so as full-time roles become less available, consultancy can be a way to maintain professional development and increase expertise.

Other roles listed by those who selected

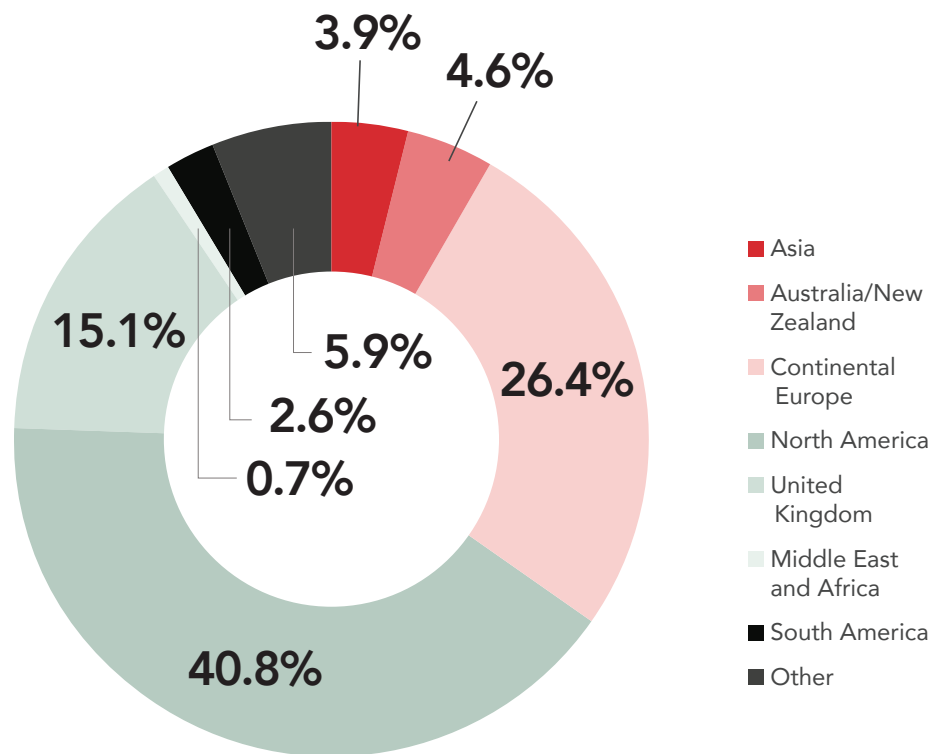
'other' have slightly differing titles but report to the following functions (in relative order): Compensation and Benefits, Tax, Reward, Immigration, Payroll, Finance.

Perhaps the most striking point is that both the dominant full-time roles and the consultants include the label Global Mobility and that those who report to HR Directors and Managers are very much in the minority.

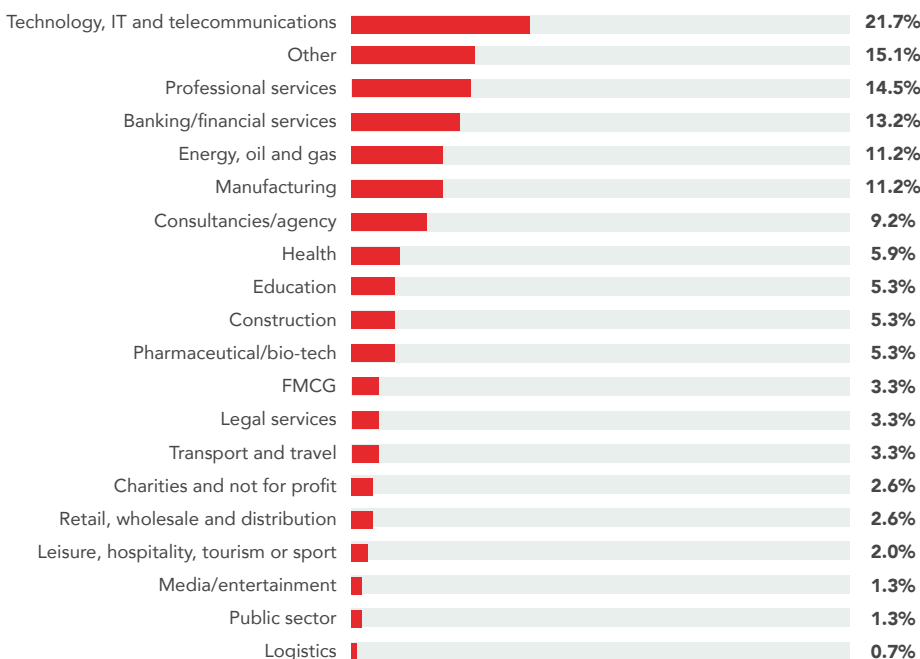
Where is your company headquartered?

This year, with 168 completed questionnaires, we had more respondents to the survey than in 2016, and marginally more than in 2017, and whilst we know that many FEM members complete the survey year after year, there will obviously be some career moves between companies and changes in the individual participants. So, although we should keep that qualification in mind, it is notable that there are significant differences between the percentages.

Most striking are the fluctuations in the figures for North America which showed that in 2016 46% of the companies that responded were headquartered there, while in 2017 that figure had dropped to 29.5%. Now, in 2018, the percentage is back up to 41%. The number of companies based in Continental Europe has increased from 2017 while the share of participants based in Australia and New Zealand and Asia has decreased (9% combined compared with 25% in 2017).



In which sector(s) does your organisation operate?



Again, this needs to be qualified, but there is a striking difference between the leading industry in 2017 (banking and financial services – 22.3%) and this year: Technology, IT and telecommunications (21.7%) followed by Other (15.1%) which includes sectors such as engineering, automotive, consumer goods and military.

Professional services show a slight increase from 13.3% in 2017 to 14.5% in 2018. Respondents from the energy, oil and gas sector have declined slightly this year, from 12.1% in 2017 to 11.2% in 2018 while those in manufacturing have slightly increased from 10.8% in 2017 to 11.2% in 2018.

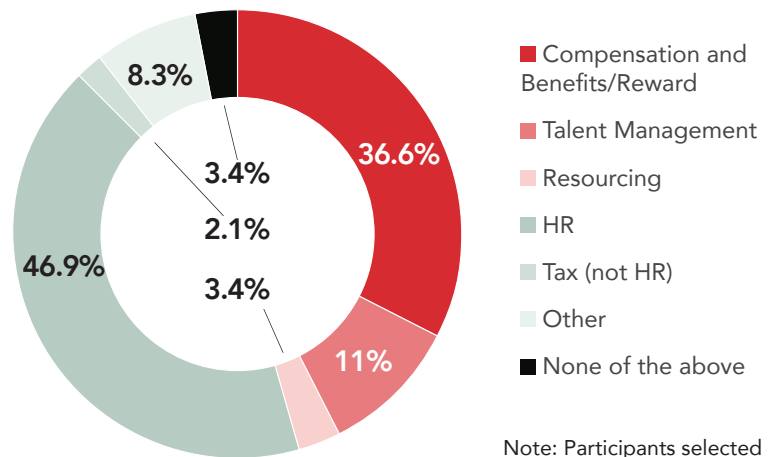
GLOBAL MOBILITY STRUCTURE AND REPORTING

This section looks at where the GM team reports to within each organisation, where respondents think it should report and how the department is staffed and resourced. We also looked at the number and types of assignments and, where possible, how the pattern has changed from 2016 and 2017.

Where does your global mobility team report to within your overall organisation?

This set of results shows a really startling turnaround from 2016 and 2017. In 2016, most global mobility professionals who responded to the MGMF survey reported to Compensation and Benefits/Reward (43.1% in 2016 and 45.3% in 2017) with 27.8% reporting to HR in 2016 and 23.3% in 2017, whereas, in this set of responses, 46.9% report to HR.

There has also been a slight increase in those reporting to Talent Management (11% in 2018 compared with 8.8% in 2017 and 8.3% in 2016). Those who reported to other departments appear to be reporting to HR by another name. The list includes: HR Operations, HR Shared Services, Human Capital Department and Workforce Management, as well as Employee Experience, Employee Services/Operations.



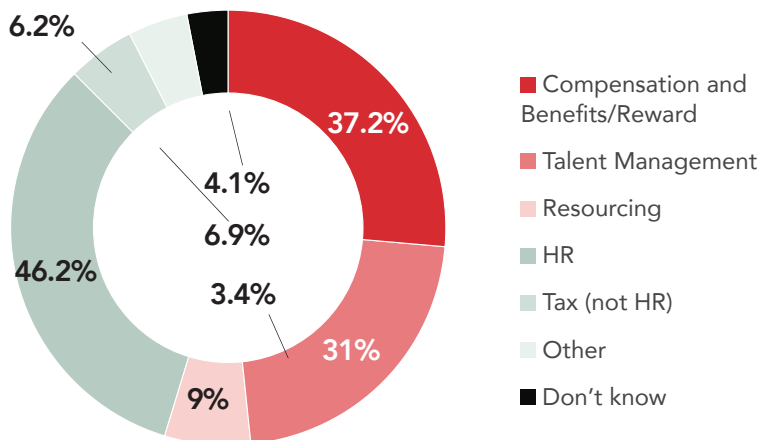
Note: Participants selected all that applied

Irrespective of where global mobility actually reports within your overall organisation, where do you think it should report?

The answers in 2017 showed Compensation and Benefits/Reward as the clear preference (38.5%) with 26.2% selecting HR as Global Mobility's most suitable home. In 2018, however, although Compensation and Benefits/Reward is still chosen by 37.2% of the respondents, HR is the clear favourite at 46.2%.

However, Talent Management has increased its share from 21.8% in 2017 to 31% in 2018. Resourcing has also increased its share (9% in 2018 compared with 2.2% in 2017) and Tax (4.7% in 2017 compared with 6.9% in 2018).

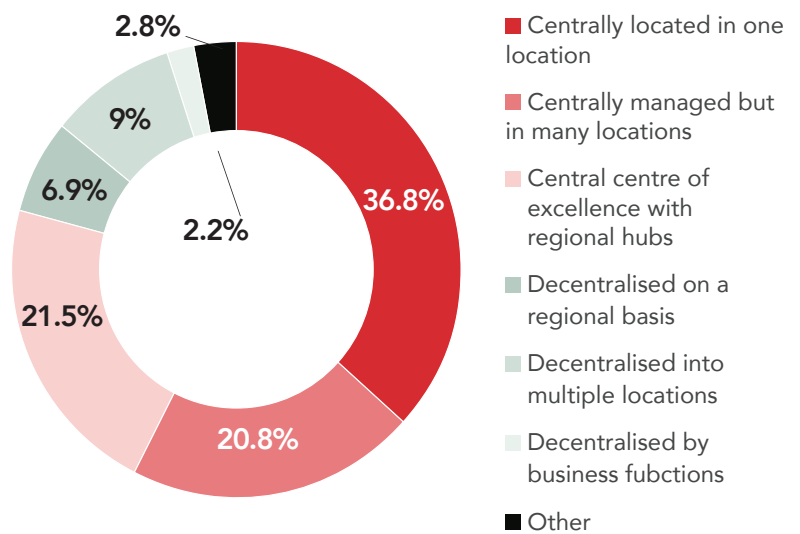
Of those who gave other answers, a number also thought that global mobility should report directly to the C-Level.



Which of the following statements best describes the structure of your in-house global mobility team?

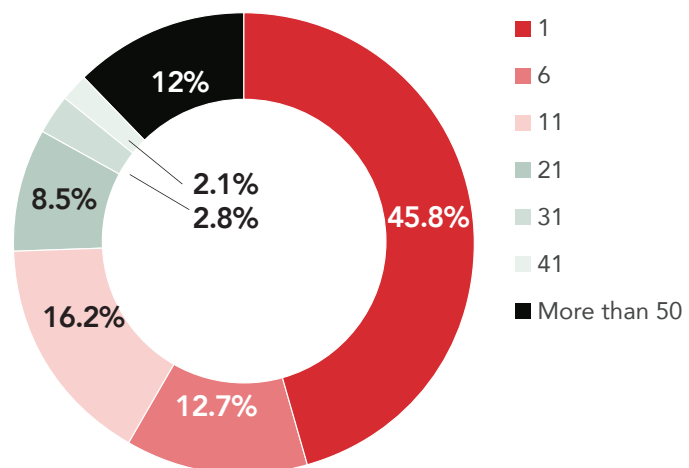
These answers indicate a clear pattern of decentralisation. In 2016, respondents reported that 42% of them were centrally located in one location, whereas in 2017, that figure dropped to 38.5% and has decreased slightly again to 36.8% in 2018.

There's a steady increase in those who are centrally managed but in many locations (14% in 2016, 22.4% in 2017 and now 20.8%). Central centres of excellence with regional hubs seem to have increased again from 16.7% in 2017 to 21.5% in 2018, while the figures for decentralised functions with regional hubs have only slightly increased (6.4% in 2017 to 6.9% in 2018) and decentralised into multiple locations has grown from 7.1% in 2017 to 9% in 2018.



How many people work full time in your global mobility team worldwide?

In 2016 just over 20% of respondents had between just one and five people in the team. By 2017 that figure was as high as 54.7%, but this has now lowered to 45.8%. The percentage of those that have between six and 10 people has barely altered at 12% in 2017 and now 12.7% in 2018, but of those with between 11 and 20 people, there has been a slight increase, with 12.7% in 2017 but 16.2% of those who responded in 2018.



Do you think that your global mobility resource is properly resourced?

These results present a slightly confusing picture. In our 2016 results, the number of people who felt that global mobility was properly resourced was 59.2%, but by 2017 that had dropped to 51.3%. This time, in 2018, the percentage has risen again to 55.7%, but those who think it is under-resourced has barely changed since 2017 when it was 43.5%. Perhaps most tellingly though, those who think that it is over-resourced has dropped from 5.2% in 2017 to just 2.9% in 2018.



Why do you say this?

When checking all the individual responses to this question, it is interesting that among the majority of those who thought that their global mobility function was properly resourced, almost all said they currently operated a small programme. Many of them also included a proviso that although it is adequate at present, should the assignee population happen to increase, it would need more resources.

Another common response was that much more of Global Mobility has been decentralised – either through a system of regional hubs, or it has been outsourced.

Responses about the outsourcing of functions were generally neutral, but there were also some anxieties that it would not

be a sustainable model if the mobile population increased, and there were also concerns that so much outsourcing meant that there was not enough in-house expertise to deal with, or prevent, more complex problems.

Managing business travel and increasingly complex immigration regulations also appeared to demand more time and attention and the common theme seemed to be that there are too few resources to cover that and all the other GM duties properly.

Below is a sample of some of the responses that voice the most common concerns or observations.

Of those who stated that they thought function was properly resourced:

“The number of assignees is proportionate.”

“Whilst we have high volumes and a small team (three GM consultants globally, with three in admin support), our model is relatively 'light' and certain aspects are outsourced.”

“Not a huge population of international cases, thus can be handled well.”

“Our expat programme is currently very small and manageable.”

“We have an adequate amount of staff to manage the daily workload while still developing programme, process and strategic initiatives.”

“Our relocating population has decreased.”



However, some also sounded a note of caution:

"Each country has its own global mobility function, so they are adequately resourced."

"Due to the current volume of mobility actions it is properly staffed – in the future as more mobility topics will come up it needs to be increased."

"In case the employee head count increases, we would ask for an additional resource for our team. Currently we are not overloaded with work."

"We have the right amount of resources but we're not yet allocating those resources in the best way."

"Currently fit for purpose as the expatriate population is relatively small, but would be under-resourced if this population grew."

"Our relocating population has decreased."

On the use of technology:

"Increasing workload and scope, and lack of technology support."

"We are currently also deploying additional technologies to support the function but are also likely to assume responsibility for new service areas."

"The provision of our end-to-end service is fully outsourced to a third party. Strategy, governance and contract management remain in-house."

"Processes are not well-defined and a lot of the processes can be streamlined by use of more advanced technologies available."



Of those who are concerned that their departments are under-resourced:

"Assignment figures are growing, team size remains same, quality and reaction time suffers."

"Volume dictates we should have at least one additional resource."

"With approximately 100-500 worldwide employees needing immigration support in our locations [APAC, Europe and the Americas] it is too little to have one part-time global mobility manager with EMEA focus and responsibility for worldwide policy and process development (and implementation). Even with the support of a third-party immigration service provider and local HR support, the time and financial resources are not there to handle global mobility strategically."

"I don't think we have too little persons working on GM per se. I believe, however, we outsource too many activities related to GM and have too little inhouse expertise to tackle/prevent issues effectively."

"Legal conditions change every year so that lots of additional work has to be done."

"Assignee numbers are growing fast and the demand on mobility is higher, but the team supporting the function isn't growing. There are much more demands on mobility professionals without the required support."

"Too few people for the size of our in-house programme."

"We have recently lost some resources, which has resulted in some task movement which I don't believe is taking advantage of the skills in the team appropriately, leaving us less able to support the business as a whole."

"To do everything needed properly we need more people locally on the ground."



"Not enough people with proper experience and knowledge and HQ not strong in terms of implementation and power."

"Not enough head count to meet internal demand for our services."

"Not enough full-time employees assigned to the function relative to the number and complexity of the case load globally."

"One person to handle all global mobility for a company leaves the company and the function without a succession plan or knowledge resource."

"We have one person fully dedicated to the programme who works with HR partners and vendors and one assistant level that part time provides support. I am new to the function – the mobility manager will now report to me so hoping that helps but the programme is so active the one person doing it all is drowning."

The issue of immigration and business travel:

"Currently permanent transfers and extended business trips are out of scope, though business expects us to lead these processes. Unfortunately we don't have the bandwidth to do this right now."

"We also manage global immigration for all employees and that volume of work is much larger."

"Our global mobility managers also look after the immigration function and don't do the full end-to-end process for mobility. In order for that to happen, they would need to be freed up from other duties."

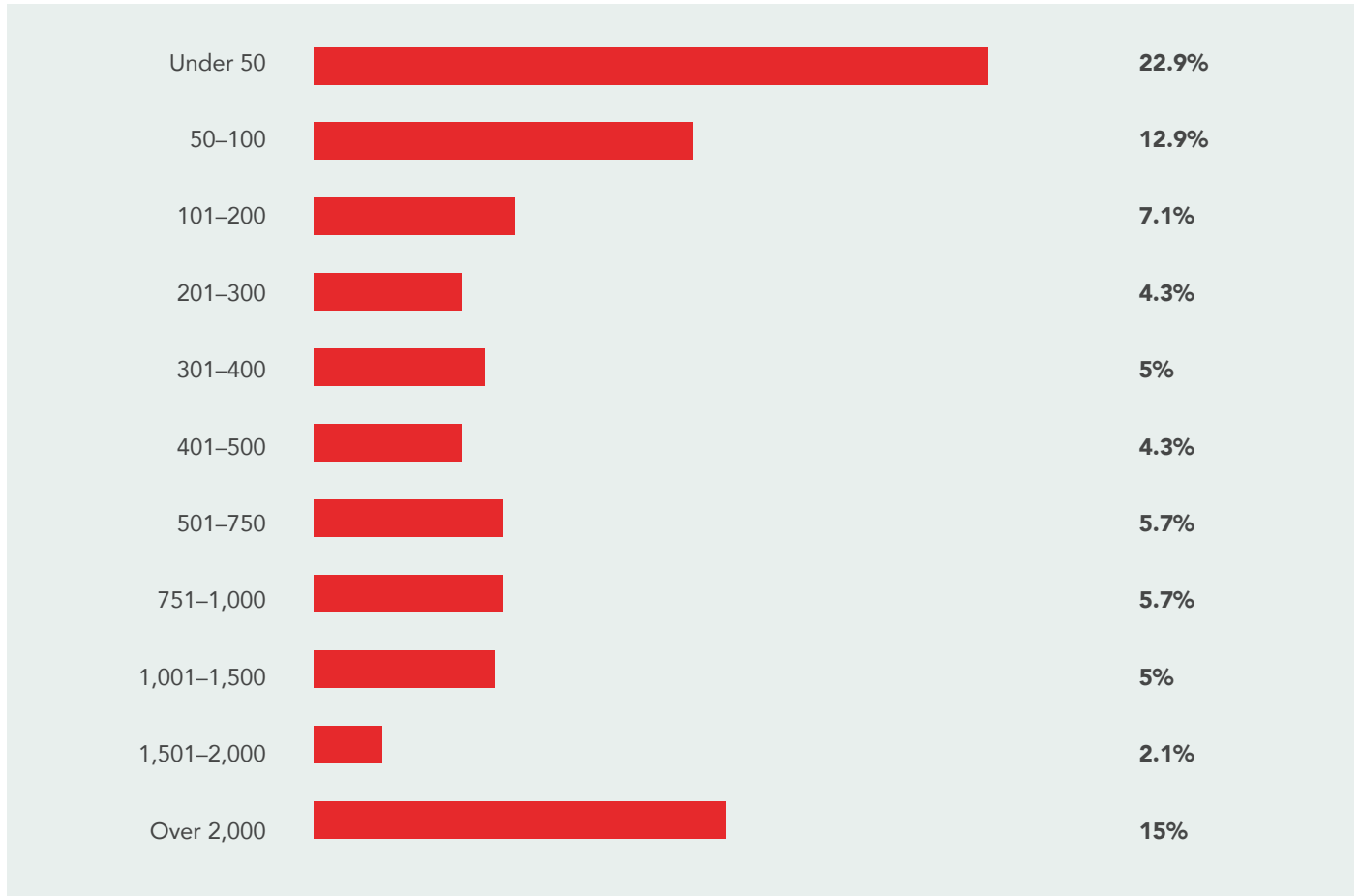
"Staff [numbers are] added [to] by contractors and the team is approached for cross-border moves, immigration challenges..."

"Increasing need to manage business travellers but don't have the resources."

How many assignees does your organisation have worldwide?

While organisations with small programmes of 50 assignees or fewer now appear to account for a smaller percentage here, those with populations over 2,000 have increased to 15% in this set of responses compared with 10.7% in 2017 and 9.3%

in 2016. Before concluding that mobility programmes are expanding however, it is important to note that a significant number of the organisations taking part have been through an M&A process.



Note: 10% did not say

What percentages of your assignees fit the following types of assignment?

Our 2016 and 2017 MGMF surveys yielded exactly the same percentage of long-term assignees among our respondents at 44.01%, but this time, however, the figure has dropped down to 38%. Perhaps unsurprisingly, though, the percentage

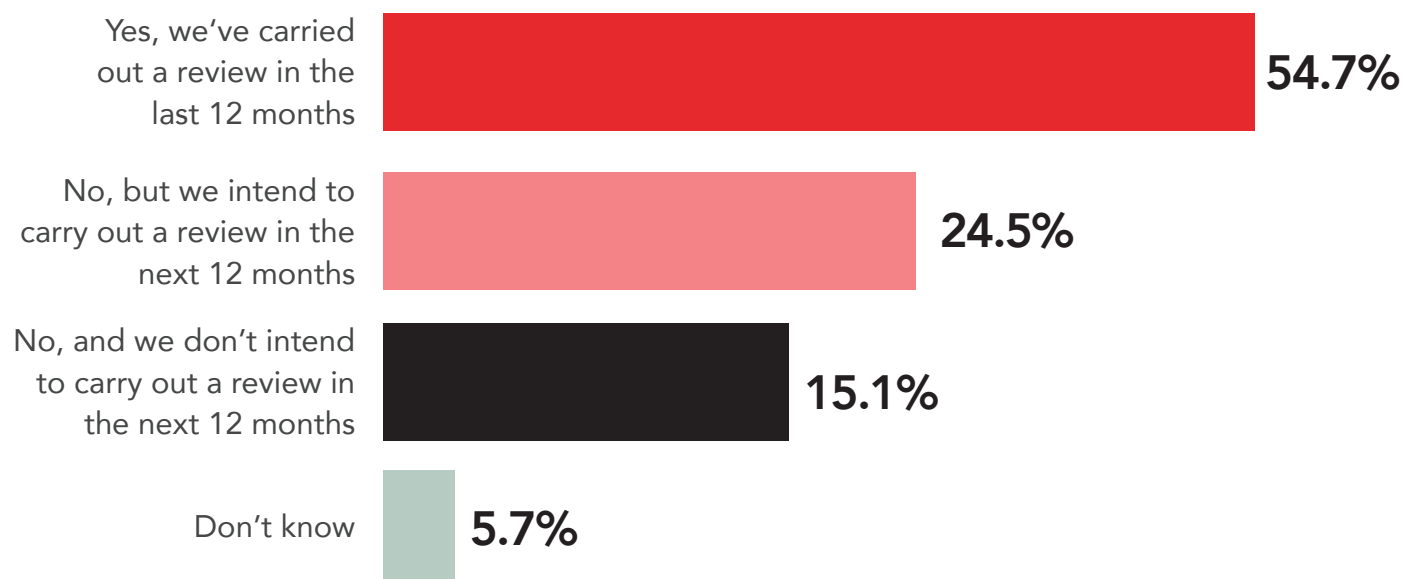
of short-term assignments has gone up from 23% in 2017 to 29.7% in 2018 and extended business travel from 16.6% in 2017 to 21.5% in 2018.



Note: Participants selected all that applied

Has your organisation carried out a mobility policy review in the last 12 months?

This is a new question for the survey, and it is noticeable that more than half of respondents' organisations (54.7%) have carried out a review of their policies in the last 12 months and that another 24.5% intend to do so in the next year.



OUTSOURCED SERVICES AND SPECIALISMS

Organisations are increasingly looking to outsource services – particularly with the aim of achieving cost savings. This may also enable in-house professionals to focus on more strategic matters and management of the function.

Which of the following services are predominantly outsourced to a specialist third party?

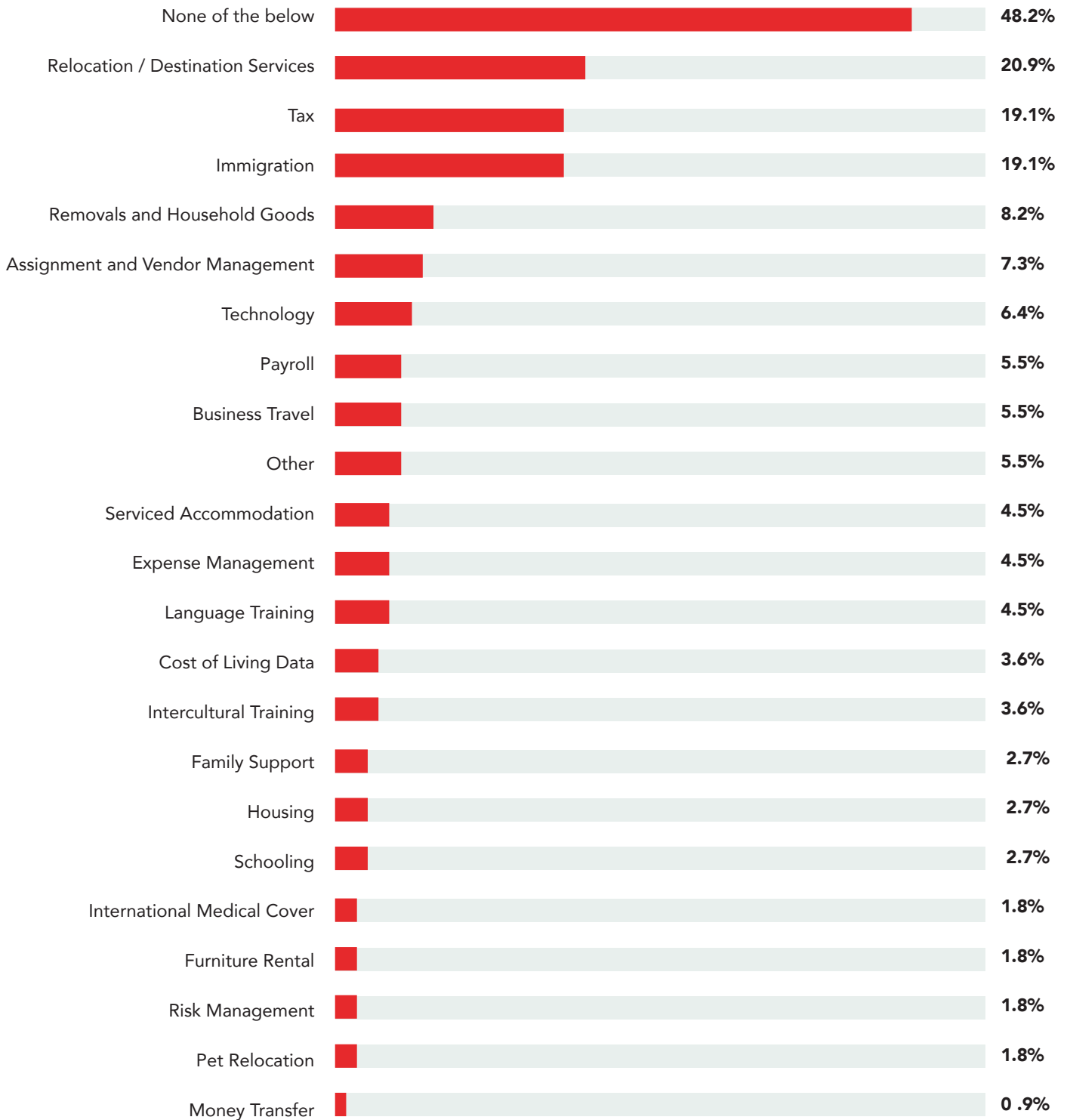


While there is very little difference in the percentage of respondents' organisations outsourcing key services such as tax and immigration over the last 12 months, the approach to other services has changed

dramatically. For example, only 3.6% outsourced payroll in 2017, but this year, respondents report that 23.0% now do it. Conversely, the percentage outsourcing business travel management has almost

halved since 2017 when it was 51.1% – it is now just 25.9% – something likely to impact on the global mobility team's workload, as the responses to our question about global mobility resourcing show.

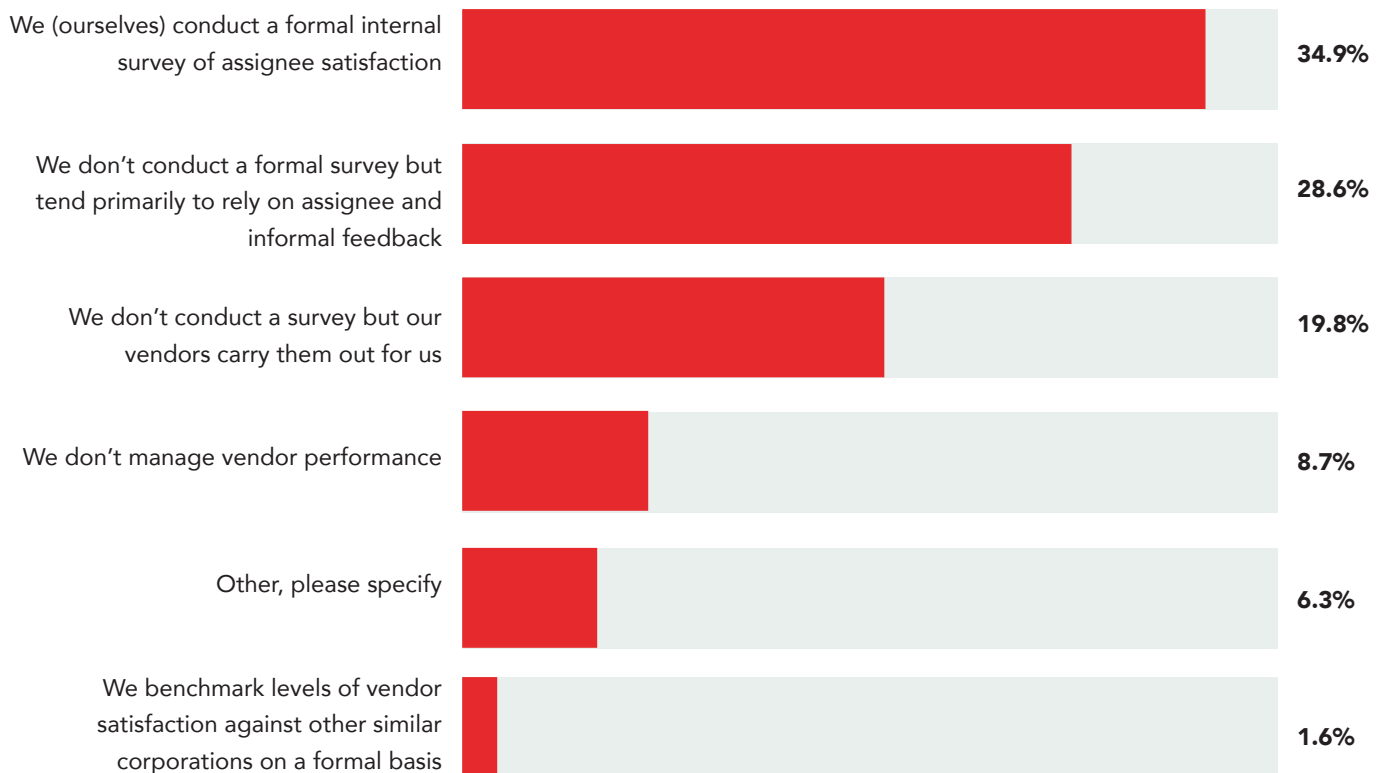
Are you planning to change any of the following providers over the next 12 months?



While there is some appetite for changing providers for tax (19.1%) and immigration (19.1%) and relocation / destination services (20.9%), this has barely changed from 2017.

Overall, most seem reluctant to move (48.2%) which continues the trend from last year (52.0%).

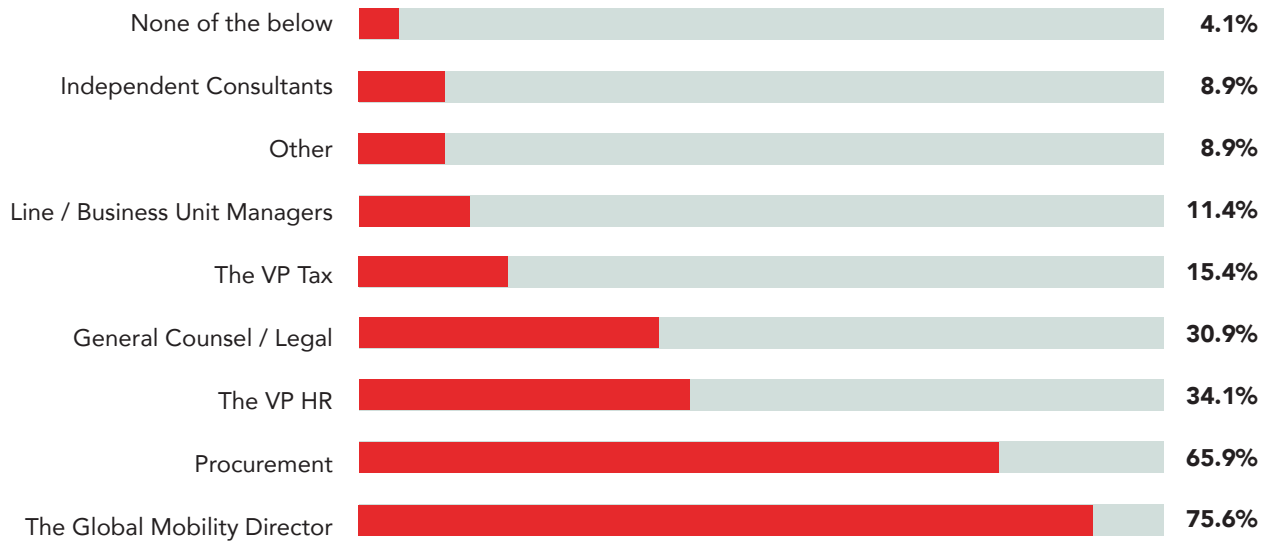
How do you manage vendor performance?



Interestingly, between 2016 and 2017 the trend appeared to be towards an informal approach; in 2017, 43% said that they didn't conduct a formal survey and tended to rely on assignee and informal feedback – a figure that increased from 34.1% in 2016.

Here, though, that appears to have been reversed: in 2018 only 28.6% don't conduct a formal survey and rely on assignee and informal feedback. Formal surveys are being conducted by 34.9% now, compared with 26.6% in 2017. Also remarkable is the fact that so few organisations seem to benchmark performance at just 1.6%.

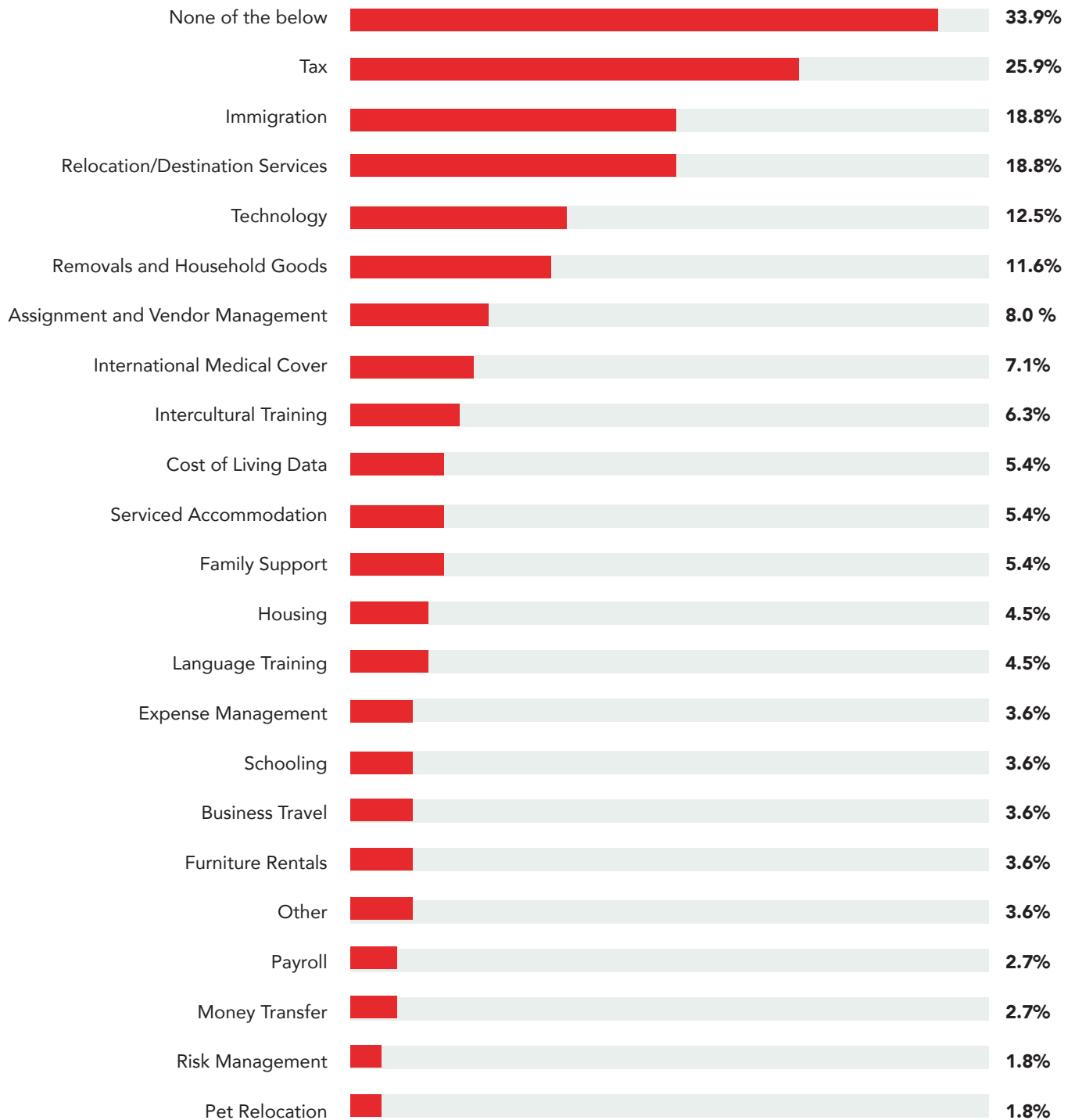
When you go out to RFP, which of the following are involved in the process?



Clearly, there is little appetite (or time) for changing vendors more often than every three years, with almost every function being reviewed then. Although the Global Mobility Director is still most often involved in such decisions at 75.6%, the involvement of Procurement has increased from

58.4% in 2017 to 65.9% today, while HR's say seems to have decreased from 44% last year to 34.1%, and legal counsel have increased their influence from 20.8% in 2017 to 30.9% – one reason for this may be the new GDPR legislation.

What RFPs (if any) are you planning in the next 12 months?



Tax, at 25.9% is top of the list here, with immigration at 18.8% and relocation/destination services at 18.8%, but this and the approach to almost all the other services show little change from the results of our 2017 report. One notable difference is in

Technology services: in 2017, 8.6% planned to go out to RFP in the following 12 months; this year, 12.5% say they plan to do so – perhaps a reflection of the tremendous pace of technological change and the increasingly complex tasks and need for data.

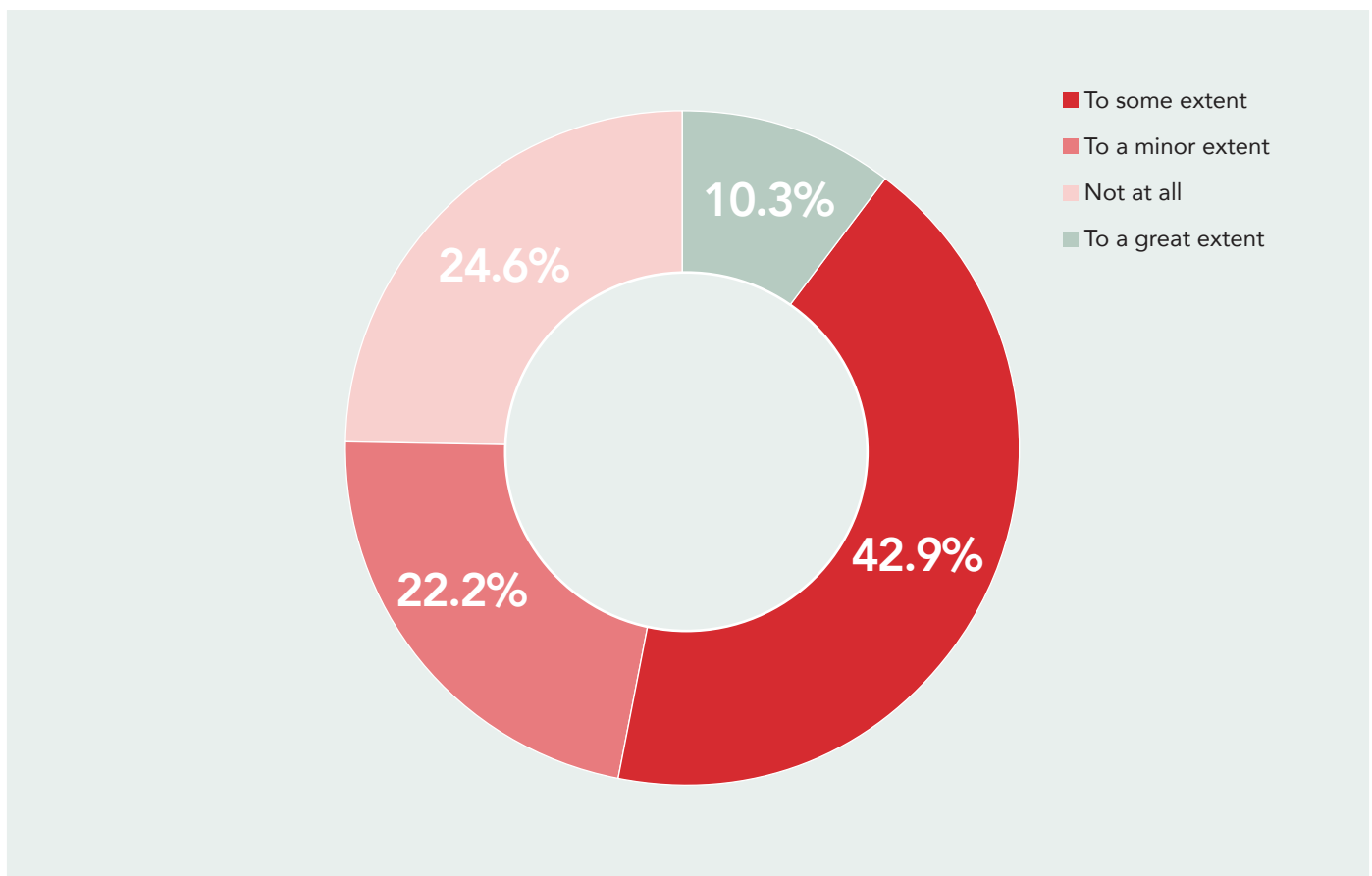
In 2016 we asked whether our respondents thought that Brexit would change the willingness of multinationals to do business in Britain (35% said YES, 30% said NO and 35% replied DON'T KNOW).

In 2017 we broadened the question beyond Britain and the result was that 41.2% of our respondents said they were affected by international changes to some extent and 15.3% to a great extent, 27.5% to a minor extent and 16% thought that they were unaffected.

This year, 10.3% report that geo-political changes have affected them to a great extent, 42.9% to some extent, 22.2% to a minor extent and 24.6% not at all.

At first glance it would appear that there has been less impact, but this year, we also asked for some more detail and so we have included a sample of the answers we received below.

To what extent have changes in the geo-political landscape affected your organisation's international moves over the last 12 months?



Why do you say this?

"Brexit has caused a significant review of our business as a whole and whilst it might not have greatly affected our ability to recruit right now, it will significantly do so at a later stage."

"Immigration laws have changed, creating new challenges in bringing and securing talent from abroad."

"I don't feel that there has been a significant change in moves over the last 12 months but over the last two to three years we have seen a drop in expat long-term moves and focus on commuting/extended business travellers. Brexit may be affecting the business by them waiting for final regulations to be released before making decisions on their mobile population."

"Changing US policies and the implementation of EU GDPR have influenced our work."

"Changes in immigration laws."

"Greater growth outside US, higher growth outside UK in the EU."

"In the Asia region we have more challenges from the business internally. Externally, we [have to] have more flexible arrangements compared to other regions, mainly due to the requirements of our clients, which are also affected by the geo-political conditions in many countries in Asia."

"Immigration requirements in many countries are changing (tighter) and it takes longer to obtain visas/work permits. We've also had visas denied for cases that normally would have not been denied."

"Significant focus on moves into continental Europe due to Brexit. New relocation policies introduced based on Brexit-related moves."

"Brexit impacts the amount of families relocating to the Netherlands where we are based, so quite a few incoming private clients."

"Brexit."

"Increase of local to local transfers due to the political and economic situation in Brazil."

"Changes in immigration and tax have impacted our ability to sponsor people in certain jurisdictions and have made relocations more expensive."

"Immigration to the US caused few issues lately because of the stronger controls put in place by the Trump administration and fewer people wanting to move to the UK."

"US immigration practices have significantly impacted the types of assignments we can support into the US. Our US inbound numbers are down noticeably. Brexit, however, has not had a significant impact on UK mobility activity yet."

"Changes in immigration law or changes in practices associated with immigration are creating delays in processing and additional bureaucracy and confusion."

"Currency fluctuations."

"Challenging/protectionist global immigration environment."

"Ability to get work visas, particularly into the US."

"US immigration changes have made visa extensions less predictable and administration more onerous."

"Immigration into the US has become more challenging."

"Immigration issues to the US and Germany."



CONCLUSION

It is impossible to conduct surveys such as these under strict laboratory conditions, so all results must be qualified and looked at in context, but at FEM we are always pleased to see so many members who take part year after year – as well, of course, thrilled to have contributions from individuals and organisations who are completely new to the forum. So, while we cannot claim an exact like-for-like snapshot of the industry from year to year, we can make some useful comparisons – and draw some conclusions from what we see.

As we noted in 2017, among those whose job title didn't readily fit the traditional types, there was a marked increase in the number of respondents who, though working on the corporate side of global mobility, defined themselves as either 'consultants' or 'specialists' and this has continued into 2018. Again, while it appears to reflect an overall shift in the global working population towards self-employment, it is important to remember these changes may be as much about cost-cutting as about entrepreneurship or choosing to be self-employed.

Among the more traditional roles, for a second year, there is a continuing slight decline in the number of 'global' heads of global mobility alongside an increase in the number who identified themselves as 'regional' heads. There have also been a few reversals of what looked like significant trends in 2016 and 2017. In 2016, 46% of the companies that responded were headquartered in North America, and 2017 saw that figure drop to 29.5%. Now, in 2018 the percentage is back up to 41%. The UK has long been the headquarters for major multinationals, but this time the percentage based in

Continental Europe has increased and has dropped slightly in the UK – we can only speculate, but the uncertainty over Brexit surely cannot be a coincidence. Another surprising change is that the share of participants' organisations based in Australia, New Zealand and Asia have all dramatically decreased – now at 9% when combined compared with 25% in 2017.

There also seems to have been a return to HR as a 'home' for global mobility, both in terms of where departments currently report and where GM professionals think they should report. In 2017, most thought global mobility should report to 'compensation and benefits/reward' with just under a quarter of our sample selecting HR as global mobility's most suitable base. In this year's survey, however, although 'compensation and benefits/reward' is still chosen by 37.2% of the respondents, HR is now the clear favourite at 46.2%.

Last year when we asked about resourcing, the percentage who thought GM was adequately resourced had dropped from the previous year, but this time that figure has risen slightly to just over half our respondents. However, when we dug a little deeper we found that many who thought the function was properly resourced included a proviso that it is the case because they currently operate a small programme and so should their assignee population increase, more resources would be required.

The section on outsourcing and vendor management revealed that there continues to be little appetite for major change. However, there are one or two notable exceptions: in 2017

the percentage of our respondents outsourcing payroll was under 5% whereas this year the figure has grown to almost a quarter (23%). It looks too as if there is more interest in reviewing technology services and perhaps this reflects the incredible speed of change in this area and the need to keep pace. There is still movement in tax, immigration and relocation management but those percentages have remained at a steady level for three years. Business travel management was outsourced by just over half of our respondents in 2017, but now only a quarter of this year's cohort says it is outsourced. It is interesting then to note that the issue of dealing with increasingly complex and restrictive immigration regulations is adversely impacting on the workload of GM professionals and that in the more detailed answers given this was a common concern.

Dealing with shifts in immigration, tax and trading regulations were all problems that were cited in our final question about the impact of geo-political changes. With the consequences of Brexit on the horizon and what seems an increasing move towards protectionism in all regions of the world, these issues are unlikely to go away anytime soon, but at such times it makes sense to pool knowledge, and so at FEM we can at least bring global mobility professionals together both face-to-face at our events, online via our website and social media and through reports such as this.

Once again, FEM is grateful to all those who took part and to our sponsors for generously supporting the research.

The Forum for Expatriate Management 2018

APPENDIX A

SURVEY PARTICIPANTS

Accedo Broadband AB	F. Hoffmann-La Roche Ltd.	
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Contact:

E: globalmobility@alliottgroup.net

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