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Magazine of Worldwide ERC®

November 2010



The Rise of Alternative Assignments

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The Rise of Alternative Assignments

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**An Interview with
Ebby Halliday**

**Lessons in
Talent Management**

**Understanding
Data Security**

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A Miner Issue

It was the stuff that movies are made of: 33 brave and resolute miners trapped more than 2,000 feet underground for two months, a determined president intent on a positive outcome, and a sleek rescue that made use of a range of skills and technology to keep the men alive and connected to the outside... until they could be raised over a two-day period, phoenix-like, to the surface. The whole world watched the Chilean miner rescue.

And each time another miner surfaced, the celebration was intense (My favorite was Mario Sepulveda, who brought rocks up from the mine as gifts for his rescuers, and danced and chanted for the crowd with the sheer joy of being alive!).

We're more used to seeing drastic, and sometimes tragic, situations unfold on the news. But this one was a success story of epic proportions. Scores of people worked together toward a common goal, and at the end, the victims lived through their ordeal. There were a lot of lessons inherent in this remarkable event that apply to our business strategy—and here are a few that were most evident to me:

Teams work... and diverse teams work even better. One of the elements that is more prevalent in today's environment is the need for a range of personalities, knowledge, skills, and leadership. A recent blog post by Tony Schwartz, "The Four Capacities Every Great Leader Needs," notes that, "the best of all leaders—a tiny fraction—have the capacity to embrace their own opposites." Leaders who see the benefit in pulling in different skill sets and perspectives are building great teams to address challenges that are unlike those that we have encountered before. The success of the Chilean rescue depended on the miners' ability to perform like a team. They believed in their rescue, and worked together to take stock of and ration all food immediately after their mine shaft imploded—which probably



saved their lives until they were located. About a mile above them, rescuers mobilized and began pulling together the resources to find and save the men. And when Chilean President Sebastian Pinera stepped in, he summed it up this way: "We committed ourselves to do whatever was necessary to save their lives." The final team included drilling specialists, paramedics, special forces experts, disaster professionals, communication consultants, technology gurus, psychologists, nutritionists, and even a personal trainer—and each one had a role in comforting, connecting with, maintaining, and saving the miners.

Create products for the need. The Chilean rescue formula has been referred to as "75 percent science, 25 percent miracle." Drilling rigs probed the rock until they found the chamber where the men were imprisoned. Then an arsenal of technology tools were employed as rescuers modified mining instruments with gear more common to astronauts

and divers. They were able to send provisions, grooming supplies, and even cots, clothes, and medicine to the miners in tubes sent through a five-inch-diameter shaft. But the crowning glory was the 14-foot, 900-pound capsule designed by Chilean naval engineers that finally hoisted the men out of the mine... and then was sent to China a week later for another rescue. When a need is identified, sometimes the standard products and fixes need to be revised and

enhanced—and sometimes abandoned in favor of a new design.

Keep your eyes on the end result. No one—not the miners, not their families and friends, not the rescuers, and not even the president of their country—gave up on a successful conclusion. The same is true in our own workplaces: when everyone knows what success looks like and what is expected of them to achieve it, a positive outcome is more possible. If we're the project leader, we need to define clearly what our expectations are and spell out the tangible deliverables. If we're a team member, it's our responsibility to understand our contribution to the end result. And while there may not be media there to capture it, or bystanders to clap for us, we need to remember to bring a few rocks up from the mine—and celebrate the success.

—Al Blumenberg, SCRP
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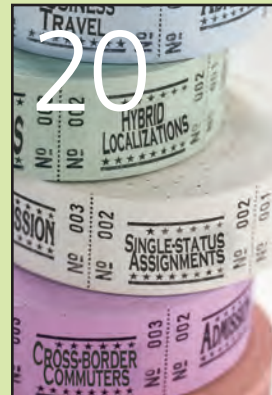
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Registration and source material ordering begins next month—look for our ad in the December 2010 issue of *MOBILITY!*

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Not sure if you’re logged-in? Look for the website to welcome you by name just to the left of the “My Account” link—located in the dark gray toolbar at the top of your screen just below the Worldwide ERC® logo on www.WorldwideERC.org. If it’s not there, you need to log-in.

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Bank of America Home Loans, Relocation & Corporate Services has named **Derek Latka, CRP, GMS**, vice president client relations manager.

Global Mobility Solutions, Scottsdale, AZ, has promoted **Samantha Hoey, CRP, GMS**, to vice president, business development. **Katie Stevenson, CRP, GMS**, has been promoted to director of business development.

SIRVA, Inc., Chicago, IL, has named **Paul LaTerra, CRP**, vice president of Advantage sales.

Weichert Relocation Resources Inc. (WRRRI), Morris Plains, NJ, has named **Kelly Reiss, CRP**, regional vice president, east region.

Cornerstone Relocation Group, Basking Ridge, NJ, has named

Michael Migliaccio senior director, client services.

Paragon Relocation, Irving, TX, has named **Thomas True, CRP**, vice president of global client relations.

Tim Trout has been named international operations manager for Arpin International Group's customer service center in Boston, MA.

Coldwell Banker Residential Brokerage in Arizona has named **Marc Krebs, CRP**, relocation director, who will manage offices located throughout Phoenix, Tucson, Prescott, and the River Cities.

Marriott ExecuStay, Bethesda, MD, has named **Shelley Salehzadeh** as an account executive in the San Francisco, CA, market. **Mark Cicio, GMS**, has been named sales manager for the midwest territory. **Scott Blind**

has been named regional sales manager for the insurance housing solutions division, southwest territory. **Patti Grobe** has been named account executive for the Chicago, IL, market.

AIRs, Pittsburgh, PA, has announced that **Laura May Carmack**, quality manager, has been elected secretary of the Pan American International Movers Association (PAIMA), Tampa, FL, board of directors.

Oceanair International, Middlesex, United Kingdom, has named **James Hooper** as director, dealing mainly in sales and marketing.

ABC Atlas Van Lines, St. Louis, MO, has named **Gregory J. Livingston** vice president business development. **Robert Teak** has been added to the sales staff in its Chesterfield, MO, office.


Fry-Wagner Moving and Storage, Earth City, MO, has named **Lona McCarty** national account move manager for its St. Louis, MO, branch facility.

PODS Enterprises, Inc., Clearwater, FL, has named **Tina Azzarella, CRP, GMS**, manager of corporate relocation.

Stevens Worldwide Van Lines, Saginaw, MI, has named **Michele Longley, GMS**, director of business development.

Lorie McBrien, GMS, has been named director of business development for Crown Relocations, and will be based out of its Hunting Beach, CA, office.

Coldwell Banker United, Realtors®, Columbia, SC, has named **Anita McLaurin-Hollis** sales associate in its Lexington office. **Shelley Queen** has been named sales associate in the Aiken office. **Tina Horne** was named a sales associate in the Northeast office. **Peggy Anderson** was named a sales associate in the Mt. Pleasant office.

Michael Saunders & Company, Sarasota, FL, has named **Danny Williams** managing broker for its two St. Armands Circle offices. 

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Improper Income Reporting Tops List of Compliance Concerns

Risk management, whether fiscal or physical, remains a topic of concern for international employers.

Now, a recent survey has sought to analyze compliance issues concerning the management of global employee mobility programs. The findings are part of the “Global Mobility Compliance Issues Survey,” conducted by Mercer, New York, NY, in August 2010. The survey includes responses from 240 companies throughout the United States and Canada.

According to Mercer, 61 percent of respondents said tax return revisions caused by improper reporting of worldwide income by expatriates was the most serious compliance

issue noted by the survey. In addition, 25 percent of survey respondents cited fines and penalties imposed on expatriates because of inaccurate reporting of income as another area of concern. A similar percentage also pointed to the challenge posed by tax audits as a result of under-reporting of income by expatriates. Other issues addressed by employers include penalties because of late tax payments and uncertainty concerning correct withholding amounts, according to the release.

“The growth in recent years of extended international business travel has only exacerbated the difficulties faced by employers in tracking income, as well as meeting both

home- and host-country tax and immigration laws,” said Geoffrey W. Latta, partner with Mercer.

Mercer said the majority of respondents lacked procedures or systems in place to handle international business travelers who often “fly under the radar.” According to the survey, 45 percent of respondents do not track the movement of business travelers at all, and 59 percent do not have a policy or procedural requirements to ensure that such employees track their own travel.

According to Mercer, the outlook is not necessarily negative. “Some employers do try to enforce a level of monitoring in order to minimize their own risk of not being compliant with government requirements,” said Latta.

For example, according to the release, for 67 percent of companies that have an existing policy or procedure, efforts to ensure compliance are apparent in business travel policies, which not only state the employees’ responsibilities for reporting, but also list potential immigration and tax penalties should they fail to do so. Thirty-eight percent of companies will not allow employees to book travel unless they agree to follow the rules concerning travel reporting. Further, 14 percent said they withhold reimbursement of expenses or payment of per diems until the employee submits a timely travel report.

“Noncompliance by expatriates with respect to accurate and timely income reporting puts an employer at risk,” said Latta. “In serious cases, the company faces potential fines, a tarnished image in the public arena, and difficulties with the host-country government—unwelcome headaches for a company striving to balance the needs of management and expatriate families.”



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Packimpex Ltd., Bern, Switzerland, has announced a new corporate identity following the integration into its brand of three companies that previously formed the **Relocation Solutions Group**.

Crown Relocations, Hong Kong, China, has announced the opening of a new office in Luxembourg City, Luxembourg, the company's fourth office in the Benelux region.

IMPACT Group, St. Louis, MO, has announced the release of Talent Alliance™, a new approach to managing talent in an organization.

Gables Corporate Accommodations, Atlanta, GA, has announced the launch of an online resident qualification and document management platform.

mLINQS, LLC, Fairfax, VA, has announced a partnership agreement with **Relocation Management Worldwide (RMW)**, Memphis, TN, where moveLINQ will be provided to RMW's federal customers.

Suddath International, Jacksonville, FL, has announced the launch of a new website, www.suddathinternational.com.

Leading Real Estate Companies of the World®, Chicago, IL, has named **Laffey Fine Homes**, Greenvale, NY, an affiliate.

Prudential California/Nevada Realty, Pleasanton, CA, has announced an affiliation with **Better Homes and Gardens Real Estate**, Parsippany, NJ. The company will now be known as **Better Homes & Gardens Real Estate Mason McDuffie**.

Communities

Right now Worldwide ERC® members are exchanging questions, answers, and ideas in our online discussion forums and blogs, such as:

U.S. Domestic Relocation Members Forum: “With the very recent news regarding the larger banks halting foreclosures for a period of time, do you see this impacting your departure side moves or only your destination program (employee is purchasing a foreclosure)?”

Global Workforce Mobility Members Forum: “I have a number of corporate clients that are looking for help developing a more cost effective global policy. Are there any corporations out there that have developed such a policy and have actual data on the resultant cost savings and expat satisfaction with the approach?”

“Recently we began implementing short-term international assignments to the U.S. for various levels of employees. The biggest issue we've hit with this is transportation costs. It's close to impossible for someone who is only going to be here for one year and who has no credit history to lease a car. Buying a car is not practical and renting a car can get very expensive. Any suggestions?”

Mobility LawBlog™ In his October 11 post, Worldwide ERC® General Counsel Dick Mansfield talks about the issues surrounding the decision by several large banks to stop foreclosures in the 23 judicial foreclosure states. “The bottom line for the employee relocation industry,” he says, “is that it is likely that foreclosures will slow down for the next year, as lenders sort out their paperwork issues. While of interest to the general economy, and certainly not a help to the recovery, this is one issue that looks for the moment to be tangential to our industry.”

China Blog™: In an October post, Mark Giorgini, GMS, global HR expert, shares first-hand experience living and working in Guangdong, China, where this summer at several car manufacturer and auto supplier plants, workers went on strike against their foreign employers. “There's certainly an increased awareness of workplace issues among the Chinese rank-and-file with whom I've come in contact,” Giorgini says.

To read the blogs and join the discussions, go to www.WorldwideERC.org/pages/web2.0.aspx. Please note that while the Worldwide ERC® blogs are public, access to discussion forums is available only to Worldwide ERC® members.



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THE RISE OF ALTERNATIVE ASSIGNMENTS

BY MICHAEL S. CADDEN, MBA, GMS

DURING THE PAST FIVE YEARS, NEW FORMS OF SHORT-TERM ASSIGNMENTS, INCLUDING LOCALIZATION, EXTENDED BUSINESS TRAVEL, AND CROSS-BORDER COMMUTING, HAVE MADE THEIR WAY TO THE FOREFRONT OF THE EMPLOYEE MOBILITY SCENE. CADDEN EXPLORES THE GENESIS OF THESE SHORT-TERM ASSIGNMENT VARIATIONS, AS WELL AS HOW THEY CAN BEST BE EMPLOYED.

At a recent conference in New York City, NY, the chatter in the room was about how the global mobility profession was redefining itself away from handling the logistics of a transfer. Today they claim to be responsible for getting the “right people, to the right place at the right time, and at the right cost,” or “global talent management.”

It was not that long ago when companies had just one or two policy types to handle relocations—long-term and/or short-term assignments. In fact, about 80 percent of all assignments in 1995 were long term; that

number has fallen annually to less than 35 percent when last measured in 2009 by Brookfield Global Relocation Services, Toronto, Ontario, Canada (Note: today a long-term assignment is one or more years, whereas in 1995 it was three or more years.). While global HR is re-examining itself, international transfers have become much more varied and complex.

Short-term assignments have been with us for some time but, during the past five years, they have splintered into other forms with recognizable names such as: localizations, hybrids, extended business travel, one-way transfers, commuters, rotators, and single-status (no families) assignments.

THE RECESSION OF 2008-2009 HAS ADDED MORE PRESSURE TO THE BOTTOM LINE. ALTHOUGH THE ECONOMY IS STILL UNCERTAIN, THE NEED TO PLACE PEOPLE AROUND THE GLOBE CONTINUES WITH LITTLE DISRUPTION AS MOST GLOBAL FIRMS NEED TO GROW AND KEEP COSTS IN LINE OUTSIDE THEIR HOME COUNTRIES.

One of the unintended consequences of alternative assignments has been the rise of “stealth expatriates.” As global HR lost control, business units were sending out their own assignees, usually in violation of tax and immigration laws. This was especially true through mid-2008 when the growing economy was putting pressure on companies to ignore the rules. All the while countries were tightening their tax and immigration systems.

Once HR understood this vast sea of non-compliance, they found themselves with a mishmash of assignment types requiring new policies. Mary Kay Woods, partner in the international executive services practice at KPMG, LLP, New York, said most of the companies her team works with have no “hard and fast” rules regarding alternative assignments, because one must look at a number of factors—home/host,

nationality, length of time, treaties, corporate issues, and the like.

How Did We Get Here?

As discussed above, part of the answer lies in HR losing control of assignments and the rise of stealth expatriates (expatriates out of compliance), but that is not the sole cause. It comes back to money. International assignees are expensive and all the easy things have been attempted to rein in the costs, including cutting premiums, class of air travel, and support services. But most of the costs of assignments are tied up in tax equalizations, housing, schooling, and cost-of-living allowances (COLA). Note that stealth expatriates probably have only housing (hotel) costs and appear to be great money savers—until they are caught. Most of these alternative assignment types are driven by the need to cut assignment costs, unless

it is a true short-term assignment for a defined project, say six months.

Contrary to other companies, according to Peggy Lee, manager, international mobility, Bunge Limited, White Plains, NY, “short-term assignments are on the rise, not necessarily for cost containment, but for talent development. The need and length of the short-term assignment is determined by the home and host country and [they] have been increasing over the last five years. Over time, we may see other types of alternative assignments due to the changing business needs and assignee demographics. In addition, Bunge will probably see an increase in localizations as long-term assignments will be nearing the five-year mark where the host country management may initiate a long-term planning discussion with the home country management whether to transfer the employee into the local plans or not.”

Localization at Bunge is considered, but is not limited to:

- when home and host country management as well as the assignee believe the position or the assignee career’s focus will shift to the host country;
- when an assignment extension will not be adequate to fill local business needs;
- when the business requirement

ON THE WEB

TO LEARN MORE about short-term assignments, please visit www.WorldwideERC.org:

“Worldwide ERC® TrendSpotting: Average Duration of International Short-term Assignments”
www.WorldwideERC.org/Resources/MOBILITYarticles/Pages/0410-TrendSpotting.aspx

“Voices from Home: the Personal and Family Side of Unaccompanied Short-term International Assignments”
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“Split-screen Life: an Intimate Look at International Short-term Assignments and Extended Business Travel”
www.WorldwideERC.org/Resources/MOBILITYarticles/Pages/0308copeland.aspx

is for the local position to be filled on a long-term basis;

- when no local candidates are available to fill the position; and/or
- when international assignee would like to stay in the host country, even though there may be local talent available to fill the position.

The recession of 2008-2009 has added more pressure to the bottom line. Although the economy is still uncertain, the need to place people around the globe continues with little disruption as most global firms need to grow and keep costs in line outside their home countries.

Localizations

Localization, in the starkest terms, means putting an assignee on local terms regarding salary and benefits, but this does not always work, especially when going to a very low-cost location.

In the Brookfield Global Relocation Services' 2010 "Global Relocation Trends Survey Report," factors considered in localization policies included expatriate wishes to remain in the host country (38 percent), a predetermined assignment length (20 percent), cost (19 percent), and no position at the home location (10 percent). Among companies that relied on localization, 21 percent localized immediately, 35 percent localized in one to four years; and 44 percent localized in a period of five years or more.

Having a localization policy helps to eliminate those rare but very expensive people who have been on expatriate packages for 10 years or longer.

Hybrid Localizations

Hybrid localizations have terms and conditions that are a combination

of a traditional assignment, home country elements plus some from the host country. Taking an assignee off an expatriate package can be financially jarring and lead to resentment; that is why many firms have adopted local-plus or hybrids, which gradually reduce the assignee benefits, or keep some such housing, home leave, and/or tuition.

Extended Business Travel

The first decade of the 21st century will be looked at as the last period where business travelers could "work" using tourist visas. The tightening of borders around the world means all people are scrutinized—especially businesspeople. With most countries running

deficits, they are looking for monies in taxes and penalties from any and all sources. Woods agrees that countries, in an effort to secure all appropriate tax receipts, are focusing on short-term assignees and extended business travelers. It not only becomes a tax problem for the assignee, but for the assignee's company. KPMG offers its client a methodology and approach that acts as a filter to see if assignees may be creating a tax issue for the assignee and/or for the company.

One-way Transfers

Some companies simply treat an international move like a domestic transfer. Like localizations, they do not even imply that a job is waiting



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EUROPEAN COMMUTER ASSIGNMENTS

Christine Wilson, vice president, marketing & web strategy at Worldwide ERC®, recently started a discussion in the “Business Across Borders” group on LinkedIn that said, “A survey of global workforce mobility professionals conducted at the Worldwide ERC® Global Workforce Summit®: Focus on Europe, Middle East, & Africa in June, predicted an increase in 2010 commuter assignments within Europe over last year. Worldwide ERC® defines commuter assignments as those where an employee lives in one country but works in another country for a specified period of time, a situation that is not uncommon for European employers. Seventy-four percent of respondents felt that this type of assignment would either ‘somewhat’ or ‘significantly’ increase.”

for them back home on their repatriation, which is rarely if ever true.

Cross-border Commuters

Cross-border commuting originally is a European concept that works well for the type of person whose weekday job is in London, UK, but who lives in Frankfurt, Germany. Folks do it in other locales, too, but it can make for very short weekends and lots of time spent in airports. New family stresses are introduced that are described in the next section.

The Middle East is another area where this type of assignment works well. For example, an assignee in Saudi Arabia might keep a small apartment near the job site while the family lives in nearby Bahrain. In Bahrain, expatriate spouses can drive and work, and enjoy a vibrant night life.

The Brookfield “Global Relocation Trends Survey Report” also cited these types of assignments as being administration-intensive and very high touch. “North America, Europe, and Asia have had cross-border commuters for years. But in the last 10 or so years, commuter assignments as an alternative to short-term (and even long-term) assignments have begun to take a larger role, primarily in Europe. Looking forward, more companies are seeing cross-border commuter assignments as a viable component of their mobility program. Over half of the companies we interviewed acknowledge that they have cross-border commuters, that responsibility for these ‘assignments’ is transitioning into international employee mobility, and that there will be a significant focus on

this assignment type in their companies over the next decade.”

Rotators

Rotator assignments are unique to the energy and extraction industries, as “assignees” living in camps are on floating oil rigs. Their schedules typically consist of 28 days on and 28 days off. It seems difficult to imagine this translating into other fields easily, but it is a model that works for these industries. Rotators are nearly 100 percent male and single-status.

Single-status Assignments

Keep the family at home and that surely will save money. It may save money on schools, but not on housing, and those trips home can get expensive. Spouses may not have their careers disrupted, but new stresses are introduced to the family, which are not always conducive to family harmony.

Recruiting unmarried people for assignment naturally reduces your labor pool and could eliminate the most experienced people who are

more likely to have children and could put you in violation of labor laws in some countries, including the United States.

The Interchange Institute, a research and consulting organization based in Brookline, MA, released two studies that looked at the effect short-term and extended business travel assignments had on employees and their families. The studies found that while these assignments were intended to be cost effective for companies, there was unexpected stress on family income: only about one-third of families surveyed believed they were adequately compensated for additional expenses for communication, household help, transportation, and child care. Short-term assignments (60 days to 12 months in this study), while considered less unsettling than long-term postings, pose “clear challenges to families,” said Anne P. Copeland, PhD, the institute’s executive director. Between 30 to 40 percent of the participants in this study said that their view of what it means to be married had changed.

Alternative Assignments

Alternative assignments likely are here to stay. How they evolve is linked closely to the evolution of working visas, which are under pressure to change from anti-immigrant populaces, demographic shifts, lobbying by multinationals, in-country companies, and the like. But they exist because one size does not fit all.

A definite benefit from alternative assignments is that several corporate departments are being forced to work together for the benefit of the assignee and the company—tax, finance, HR, and business travel.

My final word is one of caution: these assignments do not always save money, for that matter, being caught out of tax and visa compliance can incur some hefty fines and outcomes, such as deportation, that might not be anticipated. ■■

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KNOWING WHO AND HOW TO ASK FOR HELP

BY ROBERT QUIGLEY, M.D., D. PHIL

Threats to personal health take many forms, from the mundane to the massive, and workforce mobility professionals must be prepared to address a spectrum of challenges facing their assignees. Dr. Quigley offers several scenarios affecting an organization's human capital and provides guidance for seeking assistance, as well as how to develop emergency planning and support systems.

Figuring out where to turn and what to do in an emergency can be difficult in even the best of circumstances, but for employees who have transferred recently for work and who are unfamiliar with their new location, the complexities often grow exponentially. Navigating language barriers, local health care or emergency response systems, and cultural nuances can be overwhelming for expatriates who find themselves in crisis mode.

When worst-case scenarios strike, transferees and their families need a support system they can turn to. Often, having a plan in place is the difference between a positive outcome and a full-scale disaster.



Essentials of Pre-trip Planning

Employees should be advised to do their homework before travel, and if pre-trip education is not part of your company's protocol, there should be serious consideration around updating policies to include this essential step in emergency and incident preparedness. The following 10 items should be on every soon-to-be-transferred employee's required reading (and packing) list:

1. Overview of seasonal patterns and typical weather conditions for the destination.
2. List of endemic diseases (and how they typically are spread) and vaccination requirements (absence of proof of vaccination can preclude entry into some countries).
3. Contact information for a local emergency medical service provider (911 is a uniquely American phenomenon and the destination country may have no such system in place).
4. Location and contact information for the nearest hospital with Joint Commission International accreditation.
5. Overview of capabilities at the nearest reputable hospital or medical center (Does the facility have radio imaging technology, an intensive care unit, operating rooms, specialists?).
6. Overview of the current political climate in the destination as well as a history of any recent large-scale protests or military coups.
7. Location and contact information for the nearest U.S. embassy (a reliable resource at times of trouble).
8. Cell phone instructions, numbers, and codes to allow for international calling and the ability to roam.
9. Written medical emergency response plan detailing procedure for attaining assistance in health and insurance matters while abroad.
10. List of all prescriptions each traveler in the group currently takes, the generic name, and the frequency and dosage details.

When planning for the unexpected, it is important to remember that emergency situations come in all

shapes and sizes. The following scenarios are real anecdotes from Americans abroad.

Scenario One

"My baggage was lost by the airline and contains a prescription I have to take daily. Can I get a refill in Shanghai? Where? Can I trust that the pills I get will be safe?"

Whether an emergency is medical or security-related—and no matter how commonplace (a cut on the leg) or catastrophic (a terrorist attack)—determining how and where to find help can vary greatly depending on where you are. This is why it is essential to arm your employees with a support network of experts who not only understand crisis response, but understand the intricacies of foreign medical systems, have a grasp of local legal protocol, and knowledge of a wide range of geographies and cultures.

Take, for example, the fairly common crisis of losing one's prescription drugs, an emergency that ranges in severity from low to extremely high depending on the condition for which the medicine is needed and the potential effects of a stoppage of treatment.

When a prescription drug is dispensed through a reputable pharmacy in the United States, the patient generally can be assured that the drug has been reviewed and approved by the U.S. Food and Drug Administration and that it meets a set of fairly stringent safety standards set out by organizations including the Drug Enforcement Agency, Agency for Healthcare Research and Quality, and the Centers for Disease Control.

Such a high level of oversight is not a universal phenomenon. Therefore, the refilling or purchase of prescription and over-the-counter drugs while abroad should be done with caution, as medicines might be mislabeled or contaminated. Having a medical expert on call for consulta-

tion is an important safety measure to help employees determine reputable sources for medications and avoid counterfeit, expired, or tainted prescription drugs.

Scenario Two

“I was driving in Mexico when I was rear-ended. I had trouble communicating with the other driver and the officer who came to the scene, and now have been put in jail.”

Motor vehicle incidents are the leading cause of injury and death for American business travelers abroad. There are a few reasons for this prevalence, and often several factors compound to create a sort of perfect storm.

Recently relocated employees, or those just passing through an area

while stationed abroad, typically are unfamiliar with local roads, the rules that govern them, and the weather and terrain conditions that can affect driving. This unfamiliarity often results in a lower level of confidence behind the wheel and a higher level of distraction, leading to greater numbers of accidents that are more severe. Add alcohol use, speeding, or jet lag to the mix and the risk is heightened exponentially.

When an accident occurs, the employee may find him- or herself in a remote location and without legal counsel. In these cases, depending on location, the situation can become greatly exacerbated. In some areas, foreigners often are blamed for causing an accident even when they are not the guilty party. Even worse,

those who seem to be reputable police officers can turn out to be unhelpful or even corrupt.

All employees should have a number they can call for assistance in case they are in an accident. Ideally, they have these emergency contacts listed on a small card they carry with them at all times with designated contacts for legal and well as medical assistance.

Scenario Three

“I cut myself badly and am in the emergency room of the nearest hospital I could find in Quito, Ecuador. Now the doctor says he won’t see me unless I pay in cash up front. I don’t have enough money on me.”

In 1986, Congress passed EMTALA (Emergency Medical Treatment

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and Labor Act) as part of the 1985 Consolidated Omnibus Reconciliation Act (COBRA): no patient who presents to an emergency room will be turned away or unnecessarily transferred. This fundamental American civil right ensures that indigent and/or uninsured individuals always will receive treatment in emergency situations. Such is not the case elsewhere. In fact, in many countries, regardless of the clinical emergency (i.e., multiple trauma with active bleeding and/or open fractures, chest pain, respiratory difficulties, and the like) only cash (typically American dollars) will guarantee admission through the door and only with more cash will the doctor (or facsimile) even appear.

Never take your organization’s medical insurance policy for granted because the worse time to find out if something is not covered is when an incident occurs. Insurance companies pay bills and manage claims but will not actually manage and coordinate medical care outside the United States; this task often is sub-contracted to an assistance company. For example, if an employee is based in Romania and needs a surgeon, an assistance company is called to find a qualified provider and send the doc-

tor’s office a guarantee of payment so the patient gets medical care.

Savvy multinational companies have learned to work directly with assistance companies to ensure that an employee’s medical care is consistent with their organization’s standard of care, costs are managed effectively, and necessary communication takes place within an organization if an emergency occurs for business continuity reasons. Around-the-clock availability of doctors with local knowledge on the ground in many geographical locations is a critical factor when considering the choice of any assistance company.

Emergency Planning and Support Systems

Any traveler or expatriate who has experienced an incident like those described above likely needs no convincing that contingency planning and having a support system to call on is essential before beginning any international trip. Surprisingly though, according to the Control Risks’ 2007 “Business Travel Report,” more than 10 percent of U.S. business travelers said they never do any research on the countries they visit. Perhaps even more shocking, the same study found that as many as

70 percent reported they never carry an emergency phone number.

As mentioned in the sidebar on page 28, a support system should be in place for every employee traveling abroad. Whether this system is internal or made available through a partner assistance provider, it is essential that measures be in place to provide guidance and aid in both medical and security scenarios. A crisis does not differentiate between these two categories and neither should the assistance provider, as often these incidents occur simultaneously or even as a result of each other (for instance, an employee may be injured by shrapnel caused by a terrorist bomb explosion).

In an ideal world, the best laid emergency plans and support systems are never used and phone lines stay silent, indicating a safe and uneventful transfer or travel experience. But when things do go wrong—as they all too often do—employees need to have a name, a number, and a protocol in place and at their fingertips. Knowing who to call for help can make all the difference. ▀

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PROTECTING CRITICAL DATA IN THE AGE OF GLOBAL MOBILITY

BY MATTHEW DICKERSON, CRP, AND WAQAS AKKAWI, CISM

Ensuring the protection of data in today's global business milieu is an issue of paramount importance for employee mobility professionals. Dickerson and Akkawi review several common ways data can be protected during the course of an employee transfer and offer methods to ensure mobility service providers and their secondary suppliers secure that data to protect both the employer and employee.

For any company, data is one of the most valuable assets—an asset that must be kept secure. This is true of business data, of course. But it is equally true for employees' personal data, including Social Security numbers, national identification numbers, financial data, and account access entrusted to employers. Managing risk with regard to employees' personal data is both a business necessity and an ethical responsibility. And that data must be protected when an employee transfers to a new city or country.

There is a risk-management axiom that states, "risk = hazard + outrage," where "hazard" is defined as the direct cost or harm to a business, and "outrage" is the cost in terms of public opinion or lost opportunity. For managers of this data, the hazard of identity theft or fraud can be substantial, but the outrage—in terms of the market's confidence, productivity, and influence—can be even greater.

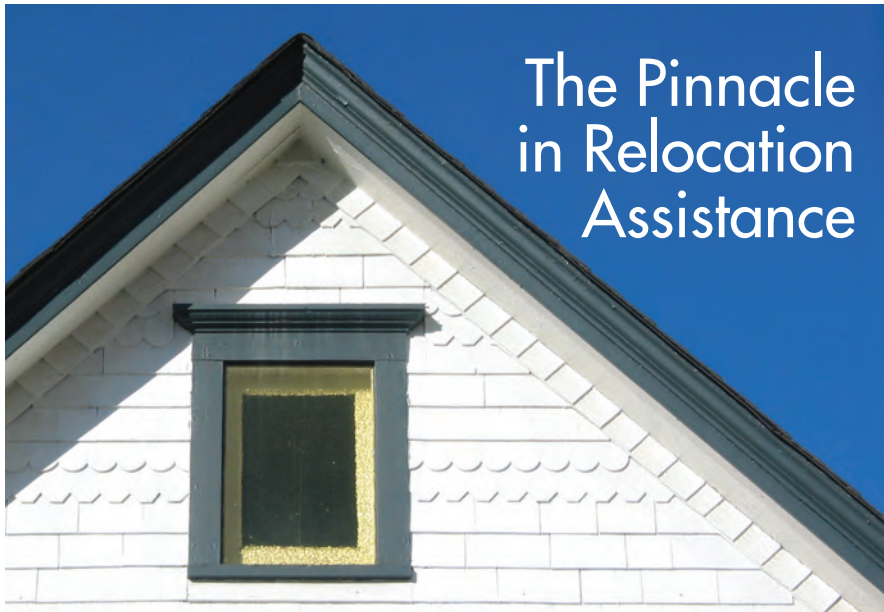
As a result, employers and their HR departments must pay special attention to securing employees' personal data during transfers. The employer must not only secure this



COMPLIANCE WITH DATA SECURITY STANDARDS

A wide range of governmental, regulatory, and industry entities publish and enforce data security standards. Some of the most common regulations and standards are noted below.

- **Sarbanes-Oxley Act of 2002.** This federal law, often referred to as “SOX,” sets wide-ranging business standards for U.S. public companies, including data security standards;
- **The American Institute of Certified Public Accountants Statement on Auditing Standards No. 70 (SAS 70),** which includes auditing procedures that enable a provider to demonstrate its commitment to data security through third-party controls;
- **The U.S.-EU Safe Harbor Privacy Principles,** a streamlined process that enables U.S. companies to comply with the European Union’s directive on the protection of personal data;
- **The Privacy Act of Canada,** which sets standards for how that country’s federal government must treat its citizens’ personal data;
- **The Payment Card Industry Data Security Standard (PCI DSS).** Because many transactions and account transfers associated with a transfer can involve credit or debit card account numbers, compliance with PCI DSS is essential for mobility service providers; and
- **The Massachusetts Data Protection Regulation (MA201 CMR 17).** Enacted in 2010, this law sets strict, detailed standards for protecting the personal data of Massachusetts citizens, in and out of the state. Demonstrable compliance can be a good indication of a provider’s commitment to data security—at rest, in motion, and in use.



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data in its own systems, but also must ensure the data is secure when it is used by a mobility services provider. The services provider, in turn, must demand the same security measures of secondary suppliers throughout the mobility supply chain.

Data Security: Definitions, Classifications, and States

Generally speaking, data includes all information stored, shared, and manipulated for business purposes. In the case of employee transfers, this means information about mobile employees and their moves, including HR data, financial information, and identifiers such as Social Security numbers, credit card numbers, and bank account numbers. It can include both electronic and hard copy information.

Data security includes the steps a company can take to protect its data from loss, theft, or misuse—in this case, steps to protect mobile

employees' personal data against identity theft or other forms of fraud.

Data typically is classified as critical, confidential, or public. Critical data directly affects an employer's ability to do business. In addition to personal employee data, critical data also can include financial information, trade secrets, investment strategies, information on mergers or acquisitions, and regulatory compliance issues. A breach of any critical data can affect negatively an employer's profitability, sales, stock value, or reputation. In the case of employee data, a breach can expose the employer to civil liability as well.

Subject to less stringent security measures is confidential (or sensitive) data, which can include operational

work routines, procedures, and project plans, designs, and specifications. Finally, public data includes readily accessible information that can be found in annual reports, press statements, or web pages.

A 'Security Mindset'

Where should a mobility manager start in evaluating the inherent and residual risks of outsourcing this information? The first test is to determine that both the primary mobility services provider and its secondary suppliers have a "security mindset." This security mindset should include the following elements:

- a dedicated security team of trained professionals whose primary job is to provide security for the data of clients' employees;

- comprehensive information-security policies that include classifying personal employee data as critical. Written recognition of the critical nature of personal data is an essential indicator that the provider has a security mindset;

- information security technologies, such as data leakage prevention (DLP) systems, that back up the provider's words with technology investments; and

- an annual information-security awareness program that reaches beyond the security team to reinforce the importance of security for all the providers' employees.

Security for Critical Data at Rest

As noted above, employees' personal data must be classified as criti-

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cal. An effective way to discuss security for critical data is to segment it further—as security professionals typically do—into three states: data at rest, in motion, and in use.

Data is described as “at rest” when it is being stored—on server hard drives, tapes, or other media, for example.

Clients’ personal employee data must be secured on the primary mobility service provider’s systems, and it is equally essential to ensure that secondary providers protect it, too.

Securing data at rest can be relatively straightforward compared to data in motion or in use, but it is a 24/7/365 challenge because it can be targeted at any time, not just during vulnerable moments.

Because most breaches of data at rest occur within a company, a provider’s primary method for securing data in this state should be to restrict access to employees who require it for demonstrable business purposes.

Security for Critical Data in Motion

Data in motion refers to the transmission of data from one location to

another—e-mail transmissions, file downloads from an FTP (file transfer protocol) site, or business-to-business integrations such as integrated web services. It is a critical component of effectively integrating with any third-party supplier. Data in motion is the source of most data breaches, so it is essential to ensure mobility service

providers and secondary suppliers protect against these breaches.

Providers should be able to demonstrate that critical data is encrypted whenever it is transmitted from one place to another—between the employer and primary provider, between primary and secondary providers, and between providers and

KEY DATA SECURITY QUESTIONS AN EMPLOYER SHOULD ASK POTENTIAL MOBILITY SERVICE PROVIDERS

Do you have a “security mindset?”

Evidence of a security mindset includes:

- a dedicated security team;
- comprehensive information security policies;
- information security technologies such as DLP systems;
- a data classification policy;
- role-based, least privileged access management policies;
- specific security policies to secure data at rest, in motion, and in use.

Can you demonstrate compliance with all applicable laws, regulations, and security standards?

Applicable standards may include:

- Sarbanes-Oxley Act of 2002;
- AICPA Statement on Auditing Standards 70;
- U.S.-EU Safe Harbor Privacy Principles;
- Privacy Act of Canada;
- Payment Card Industry Data Security Standard; and
- Massachusetts Data Protection Regulation.



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third-parties such as banks, real estate companies, and mortgage lenders.

Encryption standards may include the following:

- encryption technology for secure e-mail communication and hard drive laptop encryption for mobile devices;

- 128 bit SSL (Secure Sockets Layer) encryption for Internet-facing business applications; and

- encryption technology such as S-MIME (Secure-Multipurpose Internet Extension), TLS (Transport Layer Security) for domain to domain e-mail encryption.

Security for Critical Data in Use

Data in use includes line-of-business applications that access data in order to deliver services or process information. HR information systems (HRIS) and other financial platforms

are examples.

Mobility service providers should be able to demonstrate that they enforce a policy of “least privileged access” for the use of any data. This means that providers’ employees get access only to the least amount of data necessary to do their specific jobs.

Least privileged access typically requires specific authorization for initial access, reuse, or modification of data. A mobility counselor, for example, should have access to data for only the specific mobile employees he or she is serving. The implementation of a role-based security model helps to facilitate the segmentation of access to records as well as pieces of functionality in the line-of-business application.

And because people and roles in organizations change, providers also should demonstrate that security clearances are updated frequently and

separation of duties is enforced continually and audited for accuracy.

Protecting Information

Protecting the personal information of employees throughout the mobility process is paramount in today’s data-driven world. As companies partner with mobility providers to facilitate transfers—and those mobility providers partner with suppliers down the supply chain—it is more important than ever for employers to research the data security policies and procedures of their potential service providers. ■

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A Texas Treasure—

AN INTERVIEW WITH

Ebby Halliday

BY MARGIE DILLON, CRP, GMS, PHR, AND
DEBORAH DULL, CRP, GMS

One name that is synonymous with real estate is Ebby Halliday. We had the pleasure of meeting Ms. Halliday for the first time at a North Texas Relocation Professionals meeting in 2009. She presented during the meeting and we must admit at the young age of 98, she was the most energetic, humorous, and entertaining speaker that we had the pleasure of viewing. We walked away intrigued and wanting more.

Based on our fascination with Ms. Halliday, our quest began. The task of seeking out this multifaceted woman was not going to be easy, but we were up for the challenge. On a beautiful summer day in June we had the pleasure of spending some time and getting to know a true Texas treasure.

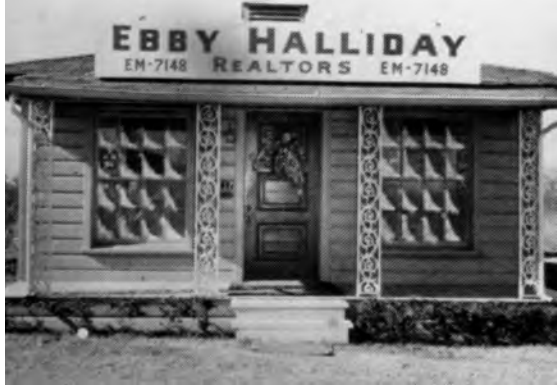
Q: Tell us about your early years.

EH: I was born in Arkansas on March 9, 1911, as Vera Lucille Koch. I was one of three children born to Louis and Lucille Koch. I never knew my father as he passed away in my early years from a railroad accident. My mother remarried and moved the family to a wheat farm in Kansas. I lived with my grandparents for the first seven years. My grandfather, Reverend James Mabrey, was a Baptist preacher. My grandparents provided me with a good foundation during my stay with them.

I worked my way through high school at a department store and graduated in 1929. This was also the year of the Great Depression and banks



All photos courtesy of Ebby Halliday, REALTORS®



across America were closing and bread lines formed in cities. It was a dreadful time with no possibility of a full-time job in a little town. I hopped on a bus to Kansas City and applied at the largest department store in town, The Jones Store. I started in the millinery department, where I learned later I was placed in order for the store to get rid of me. The store wasn't hiring, but leased departments were. I got a job with Consolidated Millinery. After a few years at The Jones Store, I was transferred to Omaha, NE. In 1938, I was transferred to Dallas. The purpose of the transfer was so that I could take charge of the millinery department at the W.A. Green store.

I had saved a \$1,000 and during a visit to my doctor's office, I overheard him instructing his nurse to make an investment on his behalf. When she left, I asked him, 'Dr. McLauren, I understand you're in the stock market. I've saved \$1,000 and would like to invest it. Do you have any stock tips for me?' He said, 'I don't give tips to women' and I

said, 'really, why not?' He replied, 'because if a woman loses, she will cry.' I looked at him and said, 'well, you try me. I won't cry.' Cotton futures was the tip he gave me and I turned my \$1,000 into \$12,000. This allowed me to open my own Dallas hat boutique, Ebby's Hats.

Q: *When did you realize that sales would be your chosen career path?*

EH: I started selling Cloverine Salve at the age of 8. I rode my pony to the neighboring farmers and sold cans, which were good for sores and sunburns. I purchased the Cloverine Salve for 10 cents per can and sold it for 15 cents. I had no overhead as my pony slept in the barn, drank free water, and ate free grass. This is how I learned to sharpen my sales skills and learned the importance of customer service and repeat business.

Q: *Who were/are the strong influences in your life?*

EH: My grandparents for teaching me right from wrong; my mother for her hardships and work ethic; my soul sister, Mary Louise Rowand, the wife of our minister at Central

Christian Church; and our company president Mary Frances Burleson for her loyalty and friendship over the last 50 years. She is one of the smartest women I know.

Q: *You have been dubbed as one of the first successful female entrepreneurs in Dallas. What challenges did you face as a woman-owned business? Do you see that the glass ceiling has broken for females today?*

EH: As the founder of the Dallas Chapter of the Women's Council of the National Association of REALTORS® and then becoming president in 1957 of the National Women's Council, I opened a few doors especially during my presidency as I traveled about 100,000 miles that year. During this time, women were not accepted in such notable positions.

There is one incident that I have never forgotten and that was when I attended a conference in Pennsylvania and was to be the keynote speaker. My plane was late and I was running late for the dinner that evening. I rushed on the elevator and I noticed

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conference badges on several of the people on the elevator. In an effort to calm myself, I kindly said, 'are you having a nice time at the conference?' At which time a man turned to me and said, 'until tonight, some woman is our speaker.' It was so much fun to see that gentleman slide under the table as I approached the platform to speak.

I was also very fortunate to have mentors like Dallas business visionaries John Stemmons and Trammell Crow. The strides that women have made today show that the glass ceiling certainly has been broken!

Q: Today achieving a good work/life balance is very important. How did your career affect your personal life?

EH: I engaged my brother, Paul Hanson, into my business, which allowed me to move away from the day-to-day business and focus on branding and building Ebby Halliday, REALTORS® beyond the state of Texas. I had numerous speaking engagements that took me all over the United States. One

speaking engagement in particular holds a warm place in my heart as it is the one where I met my future husband, Maurice Acers.

So to answer your question, it took me until the age of 46 to realize how important work/life balance was and that realization came in the form of the love of my life and my soul mate.

I met Maurice in 1958 in Beaumont, TX, when I was there to speak to the Chamber of Commerce, and he, an attorney, was there on business. We ended up at the airport together and exchanged business cards. Months passed before we finally had the opportunity to schedule time to meet for dinner, as Maurice lived in Austin and I was in Dallas. Seven years later we were married. Maurice was beginning his role as District Governor of Rotary, and he said before he started his Rotary visits, where would I like to go on a honeymoon? I said, 'you're busy winding up your business and moving to Dallas, why don't we go to Mexico City for the weekend?'

We set a date and he said his Austin CPA and wife will be there, we may run into them. I said take them with us and I'll take my CPA and his wife. He added, 'then I should take my Beaumont CPA.' I said let's take our secretaries and make it an even dozen! At which point he said, 'fine.' We all met in San Antonio on a Braniff airplane as mariachis played us aboard. So we ended up with 12 on a honeymoon. We were married for 27 years. Due to illness, we lost Maurice in 1993.

Q: You are very involved in the community. Can you tell us about the charities that you're involved in and why you selected these particular charities?

EH: Our company was founded on three points of service—to the client; to the industry; and to the community. We have followed this principle of community service for 65 years and to this day giving back to the communities in which we live and work is a key priority of our 1,600 sales associates and staff. We focus mainly on children, education initiatives, and health-

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related programs. My late husband had a sign on his desk that read, ‘do something for someone every day.’ This is my motto, too.

Q: *Did you realize at the time when you were staging your properties that staging would become an entity of its own?*

EH: I started my real estate career after a hat client brought me a message from her husband. This gentleman said to his wife, ‘if Ebby can sell you those crazy hats, maybe she can sell my crazy houses.’ He had built several insulated-cement ‘spec’ homes and was in need of a salesperson. I agreed to try it.

As you can imagine selling ‘in-cem’ homes, as they were called, was going to be a challenge, so I needed to get creative. I sold one home at a time. I would furnish each home with carpet, cottage draperies, a couch, armchair, and coffee table to allow the buyer to see the potential of their new home. This was a successful approach and I sold all of his cement homes. That’s when my product changed from ‘Hats to Houses.’ Did I know at the time I was ‘staging properties?’ No. I was doing what I needed to do to get the home sold.

Q: *How did Ebby Halliday, REALTORS® become involved in the relocation industry?*

EH: Our relocation department

was developed when I brought my brother, Paul, on board. Paul hit the ground running and was successful in securing our first group move with Associates of North America. This group move consisted of relocating 300 families from South Bend, IN, to the Dallas-Fort Worth (D-FW) area. Fifty families were airlifted each week to view the D-FW area and all but two of the 300 families bought homes and the other two families leased. Little did we know that we were in the child and animal care business as these were additional services we provided to the families.

Paul held the position of vice president, relocation, which oversaw the relocation department, and later became our broker of record, serving as executive vice president for Ebby Halliday Real Estate. Paul held this role until his passing in 2007. Today, Martha Marshall, SCRIP, SGMS, manages our corporate real estate services division, which includes our relocation department.

Q: *How has the downturn in the housing market and economy affected your business?*

EH: The economic issues today did not affect the Dallas-Fort Worth area as much as some other parts of the country. Ebby Halliday, REALTORS® continued to be solvent with a steady growth pattern through the diversifi-

cation of our service offerings, like mortgage, personal insurance, leasing, and property management. We are also known for our training, and have had a steady stream of new associates coming through Ebby School every other month.

One of the things that I am very proud of is our marketing department, which is led by Randall Graham. Randall has been instrumental in securing and supporting the company’s support of the 2011 Super Bowl being held in Dallas, and we are proud to be a sponsor of the North Texas Super Bowl XLV Host Committee who will welcome the world to Dallas in February. He also established the publication of our luxury magazine, *Grand Vie*, and he and our entire management team works hard to keep us number one in our market and among the top 10 in the nation.

Q: *How active are you in your business today?*

EH: I am in the office every day. I have mounds of mail and many requests for my time. It takes two assistants to keep all the work straight and calls returned.

Q: *Is it true that you just renewed your driver license at age 99? Can you give us insight of what your future goals are?*

EH: People ask me if I still drive and I say yep, but nobody will ride with me (*author’s note: we all shared in a laugh at this*). My goals are to leave this company in as good of shape as possible to the people that helped grow it.

Q: *Can you tell us what words you live by? And why they are important to you?*

EH: I subscribe and have for 70 years to “The Daily Word” by Unity®. This publication has given

me such inspiration and guidance. I have provided more than 100 subscriptions to friends and family.

Q: *We understand that you have several important milestones coming up. Can you tell us about them?*

EH: Yes, this is the company's 65th anniversary in business and, on a personal note, I will be 100 years of age on March 9, 2011. They are planning 100 days of celebrations in honor of my birthday. Some of the celebratory events include a gala concert benefitting scholarships through the Horatio Alger Association, which will be held at the Myerson Symphony Center with entertainment by Greek tenor Mario Frangoulis; a 'Roast and Toast' celebration, which will be hosted and benefit the Foundation Fighting Blindness; the


White Rock Lake Centennial in which we will both be celebrating 100 years; and many more I am sure!

A Texas Treasure

Our interview with Ms. Halliday was a discovery of a headstrong, business-minded woman who overcame adversity, took on the challenges of the times for women in business, found true love, developed a prosperous company, and never once swayed from the faith that grounded her. When you hear the statement, "Deep in the Heart of Texas," Ebby is one Texan that keeps the heart beating. In closing, we asked Ebby, "as the bumper sticker says, 'I'm not from Texas, but I got here as quickly as I could.' Do you feel the same way and how would

your business be different if located in another state?"

With a sparkle in her eye and a big grin on her face Ebby said, "It's the place to be... it's home to me."

If you would like to learn more about this Texas treasure, you can check out her biography "Ebby Halliday, the First Lady of Real Estate" by Michael Poss. For more information about Ebby Halliday Real Estate, please go to ebby.com. 

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Relocation to the Middle East unveiling mysteries of Arab World

A photograph of a desert landscape featuring sand dunes with a wavy, rippled texture in the foreground. The sky is a clear, pale blue, and the overall scene is brightly lit, suggesting a sunny day. The word "Qatar" is superimposed in a large, white, stylized font across the middle of the image.

Qatar



BY ANNE DEAN, GMS, AND DR. MOSTAFA REDA

Qatar, a desert peninsula jutting northward into the Persian/Arabian Gulf, is an Islamic society rich in mineral wealth. Dean and Dr. Reda provide an overview of the country with a focus on the business environment, economy, and social and political conventions.

Qatar, pronounced “cutter,” like many other Gulf countries is a combination of its ancient past and 21st-century technology and architecture. It is a country in transition that has retained its traditionalism during its modernization. The overriding influence on life, past and present, in Qatar is Islam. The Qataris remain faithful to their roots; Islam and tribal and family ties are very strong. The tenets of Islam are integral in all aspects of daily life, both social and in business.

Economy

Until the discovery of oil in the middle in the 20th century, Qatar had few inhabitants and relied on trading, pearling, and fishing. Indeed, the entire lower gulf was a prolific producer of pearls and the pearl industry was a major source of wealth in Qatar. Many of the prominent Qatari families, including the ruling al-Thani family, are former pearl merchants.

Qatar’s national income is now primarily derived from hydrocarbons that were discovered in the 1940s. It has proven gas reserves of approximately 900 trillion standard cubic feet in its huge North Field, and oil reserves estimated at 15 billion barrels. It is one of the world’s fastest growing economies with one of the highest per capita incomes in the world. In just decades, it has developed as a major global supplier of energy and is set to become the largest exporter of liquefied natural gas in the world.

The economy of Qatar is subject to centralized state control. The government owns or directly controls the country’s mineral wealth, major manufacturing enterprises, banks, and insurance companies.



Government

Politically, Qatar became fully independent from Great Britain in 1971. Today, it is an absolute monarchy with full administrative powers vested in the emir as the head of state. The right to rule Qatar is passed on within the al-Thani ruling family. Sheikh Hamad bin Khalifa Al-Thani became the new emir of the State of Qatar in June 1995, continuing the rule of the Al-Thani family that began nearly two centuries ago.

Executive power is exercised by a 21-member council of ministers, which is appointed by the emir and includes many members of the al-Thani family.

The country has no legislature, no political parties, and no elections. Laws are announced by decree of the emir after consultation with members of his family, business leaders, and the council of ministers. A 30-member advisory council appointed by the emir can comment on proposed legislation, but this council has no power to initiate or amend laws.

Sharia

Islamic holy law, the Sharia, is the fiber of life in Qatar as it is throughout the Arabian peninsula where it was born and continues to flourish. The call to prayer can be heard from the mosques five times a day, starting at daybreak.

In accordance with the tenants of Islam, some public institutions such as schools are segregated by sex or offer special days when only women can attend. There also are “family” sections in restaurants for women only. Social functions, such as weddings and teas, often are segregated with men and women in different rooms.

Qatari women, however, unlike their Saudi counterparts, may drive cars if a male guardian gives permission.

Qatar Today

Assignees will find some aspects of the society exotic and colorful. For example, in public, women wear veils to cover their hair and part of their faces, as well as heavy black robes called *abayas* to cover their bodies. Many of the older, more traditional women wear a face mask called the *battulah*. They also wear large head scarves called *hejabs*. Qatari men wear the long white *thobes* or *dish dash*, which are like floor-length robes. They wear sandals and a three-part head covering called a *ghutra*. Markets, called *souks*, are large and crowded, with small stalls selling all manner of products.

Foreign visitors and residents may find some of the Islamic influences restrictive, particularly for women in a publicly male-dominated society. However, they also will find that Qatari people have the traditional

Arab values of hospitality, family honor, and generosity.

Restrictions on alcohol vary in the Middle East, but in Qatar drinking alcohol in a bar, hotel, or club is quite acceptable. You do not need a permit, only identification. If you want to drink at home, you will need to get a permit to buy the alcohol. This can be obtained from the Qatar Distribution Company. To get a permit you need a letter from your employer, ID (passport), residence permit, a deposit, and a completed application. Gulf Cooperation Council (GCC) citizens are not allowed to receive a permit. Muslims are not restricted.

Being drunk in public and causing a disturbance is not tolerated. You could be sent to prison, receive a fine, or both. Anyone found drinking and driving can be imprisoned for a minimum of one month and face possible deportation.

Geography

Despite the fact that Qatar is small in size and may not be as geographically interesting as some of its Middle-Eastern neighbors, it offers a wide range of leisure and social activities; a well-established telecommunication network; a lower cost of living, and a hospitable, family-oriented native culture.

Qatar is a desert peninsula jutting northward into the Persian/Arabian Gulf. There are a number of islands



found in the coastal waters that belong to Qatar. Halul is the most significant, as it operates as a storage and port for the oil fields that are offshore. The country is bordered on the north and west by Bahrain, on the west across Salwa Bay by Saudi Arabia, and on the south by the United Arab Emirates.

Most of the terrain is flat and arid except for the Dukhan anticline in the west, a gradual rise from the east to a central limestone plateau, and some low cliffs at the northern end of the eastern coast. Summers in Qatar are brutally hot, sometimes reaching mid-day temperatures of between 66°C (120°F) and 72°C (130°F).

History

Archeological expeditions have found rock carvings, spearheads, and pottery that date back to the 4th century B.C.—relics of an Ubaid civilization. Qatar also was mentioned by the 5th century B.C. Greek historian Herodotus and the geographer Ptolemy. Islamic Qatari history probably began in the middle of the A.D. 7th century when Qatar came under the rule of the Al-Munzir Arabs.

Beginning in the 18th century with the migration of tribes from what is now Saudi Arabia and Kuwait, Qatar developed into a modern Islamic civilization. The Turks occupied the country in 1868 and absorbed it into the Ottoman Empire.

At the beginning of World War I, however, Turkish forces were evacuated from Qatar and, in 1916, Great Britain negotiated a treaty recognizing Sheikh Abdullah al-Thani as ruler. The Sheikh agreed not to dispose of any territory or enter into any relationships with other governments without British consent. In return, the British offered protection against aggression. A British protectorate until 1971, Qatar today retains a British flavor.

Oil was discovered in Qatar in 1940 by the Qatar Petroleum Company, owned by Anglo-Dutch, French, and U.S. interests. Exports did not begin until 1949, but the 1950s and 1960s began a period of increasing oil revenues, growth of

oil-related wealth, and a surge of immigration.

Oil revenues have brought extensive changes to Qatar with modernized communication systems, distinctive contemporary architecture, and an influx of assignees seeking new opportunities. Native Qataris enjoy a high standard of living and many social service benefits.

Almost 80 percent of the population lives in and around Doha, the capital. Nearly all Qataris are followers of Islam and speak predominately Arabic dialects; most know at least some English.

Foreign workers with temporary residence status, however, make up nearly half of the population. They are predominately from India,



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Pakistan, Bangladesh, Sri Lanka, Egypt, Palestine, Jordan, and Iran. The population is growing at about 5 percent annually.

Ethnic Makeup

Indigenous Qataris, who are of Arab and Bedouin or Persian origin, make up only about half the population. Descendants of migrating tribes, mainly from Najd, al-Hasa, and Oman, began arriving in Qatar in the 1700s.

Religion

Islam is the religion of Qatar; the observance of Islamic law and custom dictates all aspects of life. Islam literally means “submission to the will of God,” and the laws, political ideology, and economic structure of society are governed by Islam.

Makkah and Madinah in ancient Arabia, now Mecca and Medina in Saudi Arabia, the holy cities of Islam, were the birthplaces of the faith 1,300 years ago. Mohammed, who began his religious mission in Makkah after his birth in A.D. 571, received a revelation from God through the archangel Gabriel that established him as a prophet and messenger of God’s word. The Koran written in rhyming prose is the text of these revelations.

On the death of Mohammed, Islam was split into two groups, Sunni and Shia. As in neighboring Saudi Arabia, the majority of native Qataris are Sunni, who adhere to the puritanical Wahabi sect, which holds that only God is divine, not the Prophet Mohammed or his descendants.

Ninety-five percent of the Qatari population is Muslim. Christians and private Christian worship are tolerated, but Jews and Judaism are not.



The Five Pillars of Islam

The tenets of Islam are built around five main duties, the pillars or *arkan*, of Islam:

Shahada is a simple profession of faith, signifying complete submission to God.

Salah is prayer, requiring all Muslims to face toward the holy city of Makkah/Mecca five times a day and pray. Restaurants and other public places may close briefly on hearing the call for prayer.

Zakat, the pillar requiring almsgiving, began as a simple voluntary charity to help the poor, but now is an imposed property tax.

Sawm is the fast of Ramadan, the holy month. Ramadan is the celebration of the month in which the Koran was revealed and is concluded with the feast of Id-al-Fitr. During this religious holiday period, visitors and residents should respect religious restrictions and expect various interruptions in daily activities.

Haji is the pilgrimage to Mecca that every Muslim is expected to take once in his lifetime, provided he can afford it and is healthy enough to make the journey. This occurs from the seventh to the tenth day of the month of Dhu-l-Hijjah and involves a number of ceremonial duties.

Qatari Attitudes Toward Family and Hierarchy

Family and tribal bonds are very strong, and leading members of tribes renew their loyalty to the emir, other members of the ruling family, and to the government on almost all national occasions.

Most businesses, large and small, are family-owned and operated. Heads of companies are well respected and often have a role in political and economic decision-making.

Power resides with the paternalistic figure in the extended business family.

Islam also teaches that individuals are subordinate to the family, tribe, or collective, and this influences decision-making. Although the male leader of the group or company will make the decisions, he respects the consensus of the group. Tribal or group loyalty influences decisions regarding hiring, even among foreign companies.



Qatari Attitudes Toward Foreigners

The government of Qatar encourages foreign investment, particularly in joint ventures with Qatari partners. Qataris welcome foreigners with business expertise and knowledge.

The number of international firms in Qatar continues to increase. Westerners in particular are treated with respect and politeness.

There is, however, a definite and pronounced bias among Qataris in favor of Qatari firms and ventures with Qatari participation. This bias also prevails within the workplace, where the owner or most senior person in a company will be a Qatari. Managerial positions will be held by Qataris and other Arabs, including many Palestinians, plus British assignees and other Westerners.

Qatar hopes to increase the number of its own citizens in management positions to 20 percent and is emphasizing education, training, and employment in the private sector to do so.

Qatari Attitudes Toward Employment

Much of Qatar's population is made up of foreign workers from India, Pakistan, and the Philippines who have immigrated for employment.

There are numerous Arabs who also have immigrated to Qatar, but

restrictions on some Arab nationalities are still in effect as a result of the Gulf War.

The recruitment of foreign labor is controlled by the Ministry of Interior and the Labor Department.

There is no minimum wage law. Wages are negotiable, but it is customary to provide accommodation, end of service benefits, and airline tickets home every one or two years, in addition to salary.

The right of association is limited, and although Qatar has no tradition of such, trade associations and labor unions are not forbidden by law.

The activities of women are closely restricted by law and tradition, and most Qatari women fulfill the customary roles as wives, mothers, and homemakers.

The business environment in Qatar is almost exclusively male, but there are an increasing number of Qatari women entering the workplace, especially in the fields of education, medicine, and the news media. Foreign businesswomen will find their stay in Qatar more fruitful and pleasant by observing Muslim conventions of modest dress and conservative behavior.

Cities

Al Khawr. Al Khawr, also known as Al Kohr, is located about 60 kilo-

meters (36 miles) from Doha on the northeast coast. An ancient fishing village known for its old harbor and archaeological finds, it is the site of mosque ruins and old watchtowers in the center of town.

Al Khawr, the second largest town in Qatar, is now populated with numerous new buildings, a renovated waterfront, and extensive gardens. Plans are to continue development of the town as a leisure and tourist destination and to enlarge the port to serve the industrial projects in the north.

There are no international schools in Al Khawr. Assignees living in the area usually send their children to school in Doha.

Doha. The capital and seat of government, the city of Doha has expanded at a rapid pace. It now boasts a modern skyline and a metropolitan population that consists of approximately 80 percent of Qatar's population. Prior to the discovery of oil in the 1940s, there were no modern settlements in Qatar, and Doha was just a fishing village. Urban renewal, construction of a new highway system, and a land reclamation project called the West Bay have kept Doha under construction for some time. Important residential and government areas are under development here. These will

include new embassies, ministries, a post office, and housing. Doha is the cultural and commercial center of the country, with a busy airport and seaport. Contemporary buildings stand in contrast to the existing traditional Arab architecture. Built around a bay, the city is laid out like a spider

web of concentric, semicircular “ring” roads crossed by main streets radiating out from the old *souk* on the bay. Other than the *souk*, little of the old town remains. There are modern air-conditioned shops and houses, and the waterfront is lined with impressive palaces and mosques.

Dukhan. On the west coast of the peninsula, Dukhan is the operating site of onshore oil fields. It also boasts one of Qatar’s prime beaches and a year-round tourist trade.

Umm Said/Messaieed. Umm Said, or Messaieed, is a beautiful and remote area with sand dunes that reach right to the water’s edge. Offshore coral reefs make it an attractive spot for divers and snorkelers. Dependent on and developed because of the discovery of oil, Umm Said is located on the southeast coast, approximately 45 kilometers (27 miles) south of Doha. It is an industrial town with steel and petrochemical plants, as well as an important oil and gas port. Refineries, steel factories, and other chemical installations contrast with the beauty of the dunes and beaches. Most of the assignees in the area are Norwegian. Housing is difficult to find, and educational and shopping facilities are limited. Social life for assignees generally revolves around residential compounds.

With its barren lands that are unfit for agriculture, Qatar’s economy was based mainly on fishing and pearl diving. It was very much dependent on the sea until the discovery of oil and natural gas. Now, nearly 90 percent of the national income is generated from two natural resources.

Things to Do in Qatar

There is a lot to do in Qatar, you just have to get out there and find it.

The Corniche is a focal point in Qatar and runs for seven kilometers (4.34 miles) alongside the coast from Ras Abu Abboud to the Sheraton Hotel. It is a pleasant place to walk or run and admire the ever developing skyline of Doha.



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Doha Zoo houses more than 1,500 animals and spans a 42 hectare area (103.8 acres) located on Al Furousiya Street. There are numerous grassed areas for picnics and also a children’s play area. Opening times are 8:00 a.m. to 12:00 p.m., then 2:30 p.m. to 7:30 p.m. every day except Friday mornings. Tuesday afternoons are only for women and children, and Wednesday afternoons are for families.

The *souks* are a must to visit. The most famous are the “old *souks*” more commonly known as *Souq Waqif*, which is a maze of alleyways loaded with shops. They sell everything from spices to shoes and traditional Arabic goods. This is also where the falcon *souk* is located, a fascinating place housing some birds with price tags of QR30,000 (approximately US\$8,300) and more.

The gold *souks* are located behind the Alfardan Centre, just off of Grand Hamad Street. They are a collection of jewelry shops selling an amazing array of gold and jewels at excellent prices.

There are a good variety of malls in Doha and ambling through them is a favorite pastime, especially during the summer. Many supermarkets are located within malls and all have restaurants and/or food courts.

The largest mall is Villaggio, which not only has its own ice rink and bowling alley, but its own canal where you can ride on a gondola. Malls that have cinemas are City Centre, Landmark, Royal Plaza, The Mall, and Villaggio. Most malls also have a soft-play area and/or an amusement arcade for children, which are essential in the hot summer months when you need to get the children out of the house and away from the oppressive heat.

Friday brunches are a favorite with assignees because the majority of shops do not open until the afternoon. Most of the top hotels have a wine or champagne inclusive brunch that also features fresh lobster, giant prawns, and chocolate fondue fountains. They really must be seen to be believed.

If you have children, do not hesitate to take them along as many of the hotels have a supervised children’s play area. Some of the more popular hotels are the Four Seasons, InterContinental, Marriott, Mövenpick, Sharq Village, Sheraton, and The Ritz-Carlton.

There are many other things to do in Qatar including dhow trips, horse and camel racing, and numerous forts and museums to visit; the most famous being the Museum of Islamic

Art which opened in 2008 and is home to priceless artwork from across the Middle East dating from between the 7th and 19th centuries.

Qatar also hosts some major sporting events including the Qatar Open, which attracts some of the biggest names in tennis, and the Qatar Master’s Golf Tournament. In 2009, 18 of the top 50 golfers in the world played. Qatar also plays host to many other sporting events and the charge to watch these events is either free or minimal.

Qatar has a number of beaches, however, many only are accessible with a 4x4 vehicle or are attached to hotels where you have to pay a membership fee for the use of the facilities. Not surprisingly, the more secluded beaches do not have restaurants and toilet facilities, so be prepared. This, however, can be part of the charm, especially finding a gorgeous, unspoiled beach and having it all to yourself for the day. 🦋

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FIVE HARD LESSONS IN GLOBAL TALENT MANAGEMENT

BY ED GAYDOS, PH.D.

The strategic management of an organization's human capital is a key component of a global mobility program, especially during the current economic duress facing much of the world. Gaydos provides five global talent lessons he has learned during his corporate career.

In the course of my 28 years in corporate life, I learned difficult lessons about global talent management, all of them coming out of mistakes. I hold certain beliefs about talent management with an unusual degree of zealotry because they still carry the sting of personal failure. I will not burden the reader with how I came to hold these beliefs, but will outline what I learned in the hopes of sparing others the necessity of making the same mistakes. After all, they have their own failings from which to learn.

Lesson One: Selection Trumps Development

This was such a difficult proposition for me to accept. I grew up in the world of individual and organizational development, and held the conviction that people can overcome almost any shortcoming given the right motivation and assistance.

Time and again I placed myself in the position of having to manage my way through bad hiring decisions. I finally had to accept that it is impossible to train, develop, counsel, or performance appraise a person to acceptable execution of a job for which they were not suited from the beginning.

I also had to look myself in the mirror and admit that in trying to rescue the situation I was focusing on the wrong person: I should have been focusing on myself and my decision-making, not the individual I had put in the job.

This principle is particularly true for global talent management.

Success in an international assignment depends on personal characteristics such as maturity, flexibility, and social intelligence.

In contrast, technical skills and prior international experience are poor predictors of success. In the international talent arena, 90 percent of success depends on selection (not training); 90 percent of selection depends on personal characteristics (not content knowledge); and 90 percent of personal characteristics hinge on maturity and interpersonal skills.

These characteristics largely are immune to easy development and yet are central to success in international work. Thus, selection must take a central and primary role.

Lesson Two: Employees on a First International Assignment Almost Always Are Over Their Heads

The assignment is typically the most complicated and demanding they have ever held. They usually are operating at a higher organizational level, challenge enough in itself, but now must deal with heightened levels of ambiguity, greater need for integration across business units or countries, and the sudden requirement to influence people over whom they have no direct authority. All of this comes into play just at the time they are trying to help their families adjust to living in a new culture.

For years I operated under the rosy illusion that this fine young man or this intelligent young woman would slip smoothly into a new international role. Sadly, I saw that they typically

were too inexperienced for the responsibility and had too much freedom, too much financial discretion, too much arbitrary power, and too little adult supervision.

Imagine now having made an especially poor selection—relying instead on technical background, cultural training, familiarization trips, language training, and a host of other “developmental” resources. The immature, self-centered, authoritarian know-it-all, regardless of the amount and type of development, is doomed even before arriving in country.

On the other hand, the person who has been screened properly and selected for the right personal characteristics typically has the right instincts to navigate the new and bewildering assignment. The well-selected individual asks thoughtful questions and listens carefully; values and builds on cultural differences; can articulate a business case that makes sense to a wide range of people; is skilled at enlisting the willing participation of professionals from different disciplines; and is not afraid to ask for help. Such individuals are a joy to manage because they are so easy to manage.

Lesson Three: Typically There Is No Place To Go After the International Assignment

Many companies struggle mightily with repatriation of employees, but few if any have succeeded in doing an adequate job in a consistent and standardized way. It is not their fault. The very nature of an international



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assignment mitigates against the kind of repatriation programs we all dream about. There are three reasons:

1. Holding a key job open while waiting for an international assignment to end is very difficult and usually impossible from a practical standpoint.

2. The internal competition for desirable positions continues unabated regardless of who is returning from an international assignment.

3. The decision-makers may not know the person on an international assignment well, and probably had reduced opportunity while the person was out of the country.

I was longest in coming to recognize that repatriation always would be, of its very nature, the most difficult aspect of building global talent. It is a problem that can be managed but never solved.

I had such a hard time accepting the reality because I did not want it to be true. The person who sacrifices and risks so much on an international assignment should be guaranteed a reward. It just did not seem fair that those who gave above the call of duty should be handicapped in competing for the next desirable position.

Now imagine again having made a poor selection decision, and how even more difficult it is to repatriate a person who either failed or struggled in the assignment. The best repatriation program is selecting individuals who have the highest chance for success from the beginning. Send people into international assignments who are competitive for promotion today, and there is a better than average chance they will be competitive after an international assignment.



Lesson Four: People on International Assignment Quickly Fall out of the Loop

I always was surprised at how quickly informal networks were lost to the person going to another country. The chance meeting in the hall, the dinner after the conference, the hallway chit chat, the whispered aside during a meeting—all of these small fibers of connective tissue to other people wither virtually within days.

What were solid and trusting relationships begin to age, cool, and go out-of-date. This is human nature

and another problem to be managed but never solved.

Now the person on an international assignment has no reliable source of informal information. The information that comes informally is the most valuable within an organization. It is typically framed in candid and colorful language that would never be permitted in a memo. It is timely and uncensored by layers of bureaucracy. It usually is highly accurate. Finally, and most important, the telling alone builds relationships.

So add the loss of relationship-based information to the pile of difficulties facing the international employee. And now again imagine having made a poor selection for the assignment.

The person unsuited for international work often will fall back on old habits in the absence of good information. The domineering supervisor will become even more domineering and controlling; the indecisive manager will take even longer to make simple decisions.

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In general, undesirable characteristics grow more extreme in a vacuum; while positive characteristics also grow stronger and tend to shine more brightly. The adaptable and flexible individual will find new sources of information often better suited to the job at hand.

The best tactic, therefore, for managing this drying up of informal channels of information is not a program or yet another set of formal communication vehicles. Rather, it is to select a person from the start who has the capacity for building new relationships and the insight to know what kinds of information are most useful to the job.

Yes, it all returns to Lesson One again.

Lesson Five: For the International Employee, the Rule is 'Out of Sight, Out of Affection.'

"Out of sight, out of mind" is easy enough to accept. But how many times has the employee or spouse on an international assignment issued this cry of the heart, "does anybody really care?" How many times has the expatriate employee or spouse complained of not getting personal attention?

The personal touch fades, and in its place appear e-mails, memos, voice-mails, policy manuals and, cruelest of all, utter silence.

Human nature is once again the reason for this condition. Support personnel and managers have a limited number of tools and even more limited time. Dealing with international issues is exceedingly complex and time-consuming beyond imagination. It is inevitable, therefore, that interchanges across continents and time zones will grow somewhat formal and perhaps frosty at times.

Mercifully for the final time, imagine how a person with poor interpersonal skills will respond in such a situation. Blame, faultfinding, and personal attacks inevitably will enter into the conversation.

On the other hand, the person who is well suited to the complexities of international work will have lower expectations about getting personal attention. Such a person, I have learned, also will take the initiative and find a way to personalize the relationships that are important.

Selection is the all-important hub of global talent management. It is not the only important element, but is the necessary and enabling feature that makes the rest of the system operate to maximum efficiency. ▀

Ed Gaydos, Ph.D., is co-founder of Selection Research International, Inc. (SRI), Columbus, OH. He formerly was senior vice president of leadership and succession planning at Limited Brands and former head of selection systems, leadership and development for Anheuser-Busch. He can be reached at +1 614 579 0361 or e-mail edgaydos@sri-2000.com.



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THE CHALLENGES OF MOBILITY IN

AFRICAN MARKETS


BY BRENDA H. FENDER, SCRP, GMS

At the Worldwide ERC® Global Workforce Summit: Focus on Europe, Middle East, and Africa, which was convened June 11 and 12 in Frankfurt, Germany, global thought leaders met to discuss the various trends affecting workforce mobility. Fender writes about how mobility into various African markets was identified as a significant trend currently facing the industry.

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he Worldwide ERC® Global Advisory Council is comprised of senior professionals from around the world in a diversity of industries, and includes corporate HR and senior service partners, tax, accounting, immigration consultants, single source service providers, and HR executives from multinational companies, CEOs, vice presidents, and consultants. The Global Advisory Council provides valuable intelligence in the field of mobility as part of global talent management. And, this group agrees that one of the most significant trends is the growth of mobility into various markets in Africa.

To a large extent, the upswing of mobility is caused by expansion of markets with a corresponding talent/skill shortage. It is ironic that there is a large number of needed skills in the African diaspora. From the established markets in South Africa to emerging ones in countries such as Guinea and Angola, more companies are deploying talent (or trying to return talent) to this continent. In total, mobility into Africa means mobility to a continent that is diverse (2,000 ethnolinguistic groups in more than 50 countries), challenging (some areas have little or no housing or support infrastructure), and complex (cultur-

A close-up photograph of a hand holding a silver pen, poised to write on a map of Africa. The map is overlaid on a green and blue grid background. The lighting is warm, highlighting the hand and the pen. The map shows the outline of the African continent in white lines.

al, health, safety, and corruption challenges). And, mobility to or within the continent requires unique, creative, and often expensive approaches.

At the recent Global Workforce Summit: Focus on Europe, Middle East, and Africa, experienced HR professionals offered an overview of how to address mobility issues in Southern and Central Africa, North and Eastern Africa, and countries in Western Africa. The discussion was led by Farid Ahmed, head of HR, Saudi Levant, Iran and Iraq with Nokia Siemens Networks; Carol Hondonga, recruiting and talent manager, Southern Africa with Rio Tinto; and Geremie Sawadogo, Senior HR Officer—PREM Network with The World Bank Group.

Southern and Central Africa

Some of the countries that are included in the region called Southern and Central Africa include South Africa, Madagascar, Namibia, Zimbabwe, Angola, and the Democratic Republic of Congo. Across the board, this region is rich in mineral resources, so mining industries (gold, diamond, copper, aluminum smelter, uranium) are pervasive. Along with the high-growth oil and gas sector, other important industries include agriculture, textile,



and tourism. And, with these industries come some significant challenges. Some of these issues include HIV/AIDs, which is carried by 40 percent of Botswana's population; the exodus of traditional farm owners in Zimbabwe, high public debt in Zambia, civil war in the Democratic Republic of Congo, and corruption and cultural complexities in some areas. The ability to deploy expatriates into parts of this region is both critical and daunting.

Specific mobility issues in this region include currency fluctuations, remote areas with little infrastructure, difficult travel, high cost of housing and living, immigration regulation complexities and delays, and the corresponding requirement by many governments to achieve racial quota requirements and to nationalize the workforce within specified time periods. Addressing these issues often is expensive. Companies must undergo extensive reporting and compliance requirements or face significant government fines. In fact, one company reported that expatriate costs (premiums, differentials, payroll costs, and the like) often equal an additional 50 percent of salary.

North and East Africa

Some of the countries that are included in the region termed North and East Africa include Algeria, Libya, Egypt, Sudan, Ethiopia, Guinea, and Chad. These countries

have a diversity of religious, cultural, ethnic, political, and demographic realities. In fact, even weekend days differ from country to country: Thursday/Friday, Friday/Saturday, and Saturday/Sunday weekends range throughout the region. The continued development of infrastructure resources means that one significant industry throughout the region is the telecom industry.

Challenges within North and East Africa include high labor litigation risk, firm government requirements to localize the workforce over time, corruption, historic tribal influences, cost pressures, and sometimes difficult and lengthy processes to obtain work and housing permits.

Corruption issues can be especially tricky for companies that have—as they should—clearly stated, well defined global policies. Areas where “who you know/how much will you pay” run counter to these global policies. Companies must operate in a transparent manner and create effective and well-defined relationships with their suppliers.

Companies have said that they have seen a notable increase in acceptance of opportunities in this region by expatriates, many of whom come from the European Union.

West Africa

Some of the countries that are included in the region of West Africa include Cameroon, Angola, Nigeria, Senegal, Liberia, and Morocco.

Mining is a large industry here as the region is rich in minerals.

Some of the countries in West Africa also have strict quota systems (position incumbents must reflect local demographics). This means that spouse employment can be difficult; solutions include tele-work, teaching, or volunteer activities.

In some of these countries, because of the necessity of paying housing, conflict, hardship, and other allowances, the cost of deploying expatriates can equal up to 65 percent of salary. Obviously, then, the risk of assignment failure is costly. World Bank survey data indicates that pre-departure briefings and preparation are critical.

Consistency of Mobility Policies

How do we tie all of these regions together and arrive at conclusions, as well as mobility policies that be consistent throughout the continent of Africa? To a great extent, that may not be possible. However, there are some conclusions and practices that can be true throughout Africa:

- Generally, there is a large and talented diaspora, so recruiting Africans back to is an effective way to “import” talent.

- In many countries, there is a keen awareness and legal requirement to ensure the workforce is localized. Companies cannot continually depend on expatriate talent and must develop plans for transferring skills to local workers. Talent man-



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agement strategies not only are sound HR practices, they are required by law.

- Mobility can be exorbitantly expensive in some areas because of the need to pay hardship, conflict, housing, COLA, and other expatriate allowances.

- Sometimes, particularly when families accompany the expatriate, a “tripod” of locations can be effective. In other words, the family may move to South Africa. Then, the expatriate

could commute during the week to a more harsh work location, returning back to the family on weekends.

- Companies must have clear policies relative to business ethics and legal compliance, and strong relationships with their service providers. It often is wise to partner with locals to ensure that corrupt practices are minimized.

- Pre-departure preparation is even more essential when the risk of assignment failure because of cultural or family issues is so expensive. The

complexity of countries’ historic, tribal, and political realities cannot be overlooked.

It is predicted that Africa will grow in every industry; it is teeming with infrastructure growth, opportunities are being recognized by potential expatriates, and more talent is needed. ▀

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Flourish

Personal and professional development are key benefits of working across borders. Kendall offers an overview of positive psychology, as well as suggests three areas where a change in approach can promote flourishing among an organization's expatriate population.

BY WENDY KENDALL

International mobility has become a top business priority for many of the world's largest international companies yet, crucially, there has been a sea change in aspirations surrounding this topic. These days, companies and their employees seek mobility for reasons of personal and professional growth.

In the October 2005 report, "Understanding and Avoiding the Barriers to International Mobility," by PriceWaterhouseCoopers, London, United Kingdom, and Cranfield School of Management, Cranfield, the opportunity to accelerate their own development was the most important factor influencing individuals' decision to accept an international assignment. At the same time, the 2008 report "Smart Moves: a New Approach to International Assignment and Global Mobility," by Deloitte, London, highlights the need for more streamlined integration of global mobility and talent management strategy and policy to meet companies' demand for international managers and leaders.

However, there seems to be a mismatch between what people and companies want and need from international mobility and the usual methods of supporting mobility, which are focused on a "deficit model." Traditional models of expatriate support often seek to replace what was lost in the move (e.g., practical aspects, social networks, or cultural know-how). These approaches are based on

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THE FEATURES OF FLOURISHING

Flourishing goes beyond happiness and satisfaction and comprises aspects of social, psychological, and emotional well-being and positive functioning. Recent research carried out at The Well-being Institute at Cambridge University, Cambridge, United Kingdom, in 2009 by Felicia Huppert and Timothy So identified the following features of flourishing:

Core Features:

- Positive emotions
- Engagement, interest
- Meaning, purpose

Additional Features:

- Self-esteem
- Optimism
- Resilience
- Vitality
- Self-determination
- Positive relationships

People who experience high levels of all three core features and any three of the additional features are said to be flourishing. Flourishing is relevant to international mobility policy and practice because it is associated with a wide range of success criteria for the individual and for companies. Huppert and So summarized these benefits as follows: "...individuals who are flourishing [...] learn effectively, work productively, have better social relationships, are more likely to contribute to their community, and have better health and life expectancy"

the premises "find the gap and then fill it" and, "find the barrier and remove it."

The problem with the deficit model is captured by Lygaard's U-shaped cultural adaptation curve. No matter how small, short, and shallow the U, the end point we are looking to achieve is a return to previous levels of effectiveness. This is fundamentally at odds with the idea of using mobility for development and growth, both for individuals and organizations. A person's further growth, once he or she has been through the U curve, is left as an open question to solve in conjunction with local management. As Deloitte points out, mobility and talent management remain separate or are only partially integrated.

New research in positive psychology and, in particular, research into human flourishing can be used to support expatriates' growth. Positive psychology focuses on understanding and growing people's strengths, capacities, and resources. Prior to this, there was the unwritten and previously unchallenged assumption that to create success we needed to solve problems, remove obstacles, and avoid difficulties—the deficit model again. In the past five years especially, scientists have been unpacking the other side of the "life equation" and gathering evidence for what we all suspected—a flourishing life is made up of identifiable "good stuff" rather than just the absence of "bad stuff."

What Is 'Flourishing' and How Does It Relate to Expatriate Management?

An analysis of the impact of the core features of flourishing on the workplace by researchers Corey Keyes, Frank Schmidt, and James Harter in the book "Flourishing: Positive Psychology and the Life Well Lived" showed that there was a positive effect on key business performance measures such as sales revenue and profitability. In addition, each of the additional features of flourishing is positively related to organizational outcomes.

Helping expatriates to flourish—“every nail has its hammer.” Deficit models, and their associated meth-

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ods and tools, are somehow self-limiting in the context of flourishing. The trigger for action often is the identification of a problem and the focus of action is then bridging the gap between the desired and actual state. When it comes to moving people toward flourishing, positive methods focus on finding what

already exists and then growing it, which is a far more efficient and engaging process.

How do people develop using positive psychology methods? My own experience of using positive psychology methods to develop expatriates, such as appreciative coaching and strengths profiling, is that they

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PERSONAL AND PROFESSIONAL GROWTH TOPICS

Following are some examples of the personal and professional growth topics addressed by some of my coaching clients:

- How to use my strengths in new environment and function.
- Reconnecting with my positive best self.
- Saying “yes” to that which brings out my authentic best self.
- Having time to be true to myself.
- Optimizing my own potential via personal mastery.
- Trusting myself and making my own choices.
- Discovering new ideas, perspectives, possibilities, people, and places.
 - Getting recognition for my achievements, strengths, actions, or unique self.
 - Making positive, authentic connections with others.

help people gravitate toward topics that promote flourishing.

One defining characteristic of peoples’ developmental paths using positive psychology methods is that it helps them integrate the story of who they were in their previous country with who they are now. People explore their authentic and successful self and then expand it to align with their new context. They do not “re-invent themselves” as a new person in a new place; a process that can lead them gradually toward feeling as though they have lost part of their real identity.

This is a key difference with deficit models that encourage people to learn new knowledge and skills as “additional components” in a “mobility toolkit” and positive

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methods that focus on growing what is already strong. The knowledge, skills, and experiences that people develop are intimately connected with who they are at their best and they learn how to move these into alignment with the host environment.

Three Approaches to Promote Flourishing

Based on my experiences of using positive psychology methods to develop expatriates, I suggest focusing on three areas where a change in approach can promote flourishing:


1. Help people to explore their current resources and then grow them, in contrast with mostly looking for resource gaps to fill. For example, basic competency in a local language could be developed into mastery, leading to a beneficial effect on self-esteem, positive relationships, and engagement.

2. Help people on assignment to work on positive growth themes that embrace wider aspects of

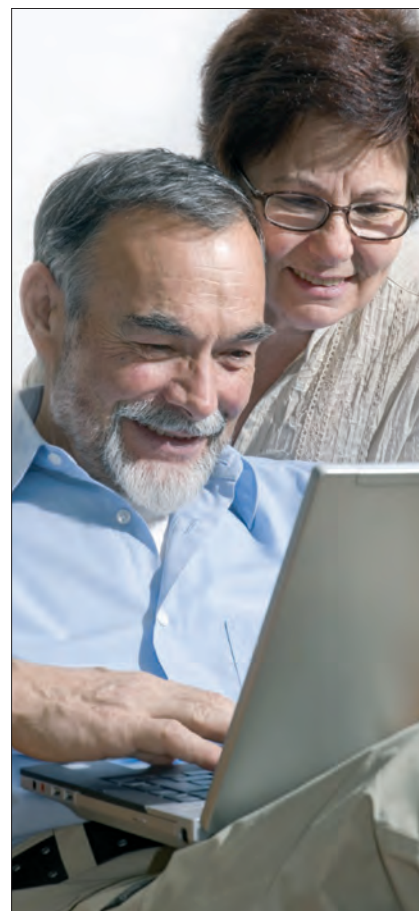
flourishing, in contrast with competency development goals focused on work performance. For example, reinterpreting their strengths within the host social and cultural context, as well as their new work context. This helps to create engagement, meaning, and positive emotions, the three core features of flourishing.

3. Promote recognition in all its forms—individual and organizational. For example, help people tell their stories about who they are and what positive resources they bring to their host environment using networking events or company publications. This helps people get recognized by others, make better sense of their life in the host country, and promotes resilience.

Unpacking the Core Elements

When we unpack the core elements of flourishing we can see that there are strong links with factors that promote company success. However, if we are to meet people's aspirations for growth following a move abroad, we need to examine current mobility policies and practices to see how they can be made to support and promote employees' ability to flourish. Deficit approaches have a useful function and purpose, but we need to be mindful of the gap between the desire to develop and grow and what these approaches can deliver. Overall, if we can take a more positive approach that focuses on personal growth rather than personal change, people can become skilled at flourishing with every move. 

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Pets in Relocation

THE EMOTIONAL GLUE HOLDING A FAMILY TOGETHER

BY WALTER M. WOOLF, V.M.D.

Emotions and finances often meet during the moving process, and Woolf evaluates reasonable practices when pets—often viewed as family members—enter the picture.

One of the most potentially stressful life events a person can encounter is relocation, and moving with family pets adds emotional and financial anxiety to the process the family will experience.

With the pet more firmly established than ever as an integral part of the family, the emotional focus of a relocation and the prospect of moving with pets has been an issue for companies to consider in their corporate relocation policies.

Recent global economic developments have brought challenges to relocating families not experienced previously. What used to be viewed as “wide-open” policies regarding mobility costs have come under more intense corporate scrutiny; costs that in the past were fully funded for the corporate transferee.

Increasing Cost

One mobility cost and benefit being affected is whether the family pet will be supported by corporate

moving policies. With ever increasing costs across the entire spectrum of relocation, employers examine ways to either reduce the cost or completely eliminate what will be paid or reimbursed.

Scheduled passenger airlines, affected by reduced passenger loads and volumes as well as reductions in air cargo volumes, have addressed their operating costs by increasing live animal “accompanied baggage” fees, in addition to increasing live animal air cargo rates and charges.

Rather than increase costs across the board for either ticketed passenger charges or air cargo fees, increases in surcharges have been applied for fuel, as well as security screening costs as mandated by Congress effective August 1, 2010.

As costs rise on all economic fronts, decisions are made reducing funding allocations to all levels of relocation, with shorter assignments as well as reduced assignments and, coincidentally, with reduced numbers of family pets allowed relocation costs.



The relocation marketplace also saw new corporate programs being introduced, such as lump-sum relocation allowances, where the transferee makes selections based on approved service suppliers in the marketplace. Service providers have responded to current economic conditions with the creation of new relocation products.

New Practices

What used to be normality in providing door-to-door pet moving services has seen the development of modified programs; for example, an origin residence to destination service level absent residential delivery at destination; as well as airport-to-airport service levels to accommodate reduced financial resources available to transferees.

Over the years of moving thousands of pets, the policies outlining which pets are covered have remained essentially the same; dogs and cats are routinely covered, along with the occasional bird. What traditionally is not covered are tropical fish, the pocket pets—mice, hamsters, gerbils, guinea pigs, rats, and rabbits—as well as pleasure horses.

The family pet provides the emotional “glue” to the family structure. Relocation brings stresses to the family with the pets providing emotional stability to the moving process.

The inclusion of family pets into the corporate relocation policies of those companies who transfer their career employees on a regular basis has brought benefits to all parties

participating in the mobility process. Peace of mind, along with the reduction in stress in the relocation of many families, are direct benefits difficult to measure and quantify, yet remain valuable to the relocating family with pets.

Deciding what family pets are covered, the number of pets authorized to move, and what pet moving services are to be authorized through direct invoicing or reimbursement procedures, are challenges easily overcome through understanding the benefits that employing professional pet shippers bring to the relocation service industry. ■

Walter M. Woolf, V.M.D., is founder, principal owner, and managing director of Air Animal Pet Movers, Tampa, FL. He can be reached at +1 813 879 3210 or e-mail petsfly@aol.com.

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Business Calls for Review of Curbs on Migrants

Financial Times (10/01/10) Boxell, James
New rules restricting companies from hiring foreign workers must be “reviewed immediately,” according to the CBI employers’ body, setting the business lobby in opposition to the government. The Home Office imposed a temporary limit on skilled workers coming to Britain from outside the European Union due to fears of a flood of applications before the permanent cap next year. Confederation of British Industry (CBI)’s deputy director-general John Cridland says he understands why the action was necessary to avoid a spike, but that the new system is “poorly managed and proving a real headache for firms.” Cridland says the government should prioritize skilled workers with existing job offers. “This relatively small pool of workers doesn’t just earn money and pay taxes here but also keeps employers and projects here,” says Cridland. Immigration minister Damian Green rejected the criticism, and argued that the border agency was already working closely with business on the interim cap. In an official response to plans for the permanent cap, the CBI called on the Home Office to permit “intra-company transfers,” which would allow employers to bring in staff from overseas offices, and be exempt from the cap for the next three years. The transfers are controversial because they are used by Indian IT companies to bring in thousands of workers every year, while British contractors say that they could do the work. The Home Office is considering limiting transfers in some areas, like IT, while permitting them in others. (<http://www.ft.com/cms/s/0/3a955a82-cccd-11df-a1eb-00144feab49a.html>)

Expatriates: Taxman Peers Into Expat Life

Financial Times (09/28/10) Houlder, Vanessa
Expatriates living in Monaco have a sensitive tax situation to worry about, as many higher-tax countries are concerned about their wealthiest citizens fleeing to avoid taxes. Foreigners living there must make sure they obey tax rules, particularly with regard to second homes—many live in small homes in Monaco with lower taxes and keep a larger home in France for the weekends. British expats especially need to be careful as the Anglo-French tax treaty was recently renegotiated. The recent high-profile case of

Robert Gaines-Cooper, who left Britain for the Seychelles due to the tax burden, has many expats concerned, as the Court of Appeal ruled that his social and domestic ties to Britain indicate he never actually stopped being a resident. Recent changes to residency rules require that British citizens make a clear break if they leave the country, and many realize they can no longer be “free and easy with popping in and out of the U.K. as they used to be,” says Stella Mitchell-Voisin, director of the Close Summit Trust Company and resident of Monaco. (<http://www.ft.com/cms/s/0/eab70ba0-c9d4-11df-b3d6-00144feab49a.html>)

Tale of Two Competing Cities

South China Morning Post (09/18/10) P. 03; Chan, May

While the common assumption is that Singapore, having been ranked the most competitive Asian city for two years, is a better place for expatriates than Hong Kong, in fact the situation is less clear-cut, experts say. The World Economic Forum’s Global Competitiveness Report places Singapore at third and Hong Kong 11th, based on factors such as infrastructure, macroeconomic environment, education and training, market size, business sophistication, and innovation. But Professor Steve Dekrey of the Hong Kong University of Science and Technology says that in terms of business size, available talent pool, and proximity to the mainland, in addition to being the financial hub of Asia, Hong Kong has the edge. Singapore has been more progressive in offering perks for young talent, though, such as a six-month work-holiday visa for new grads so they have time to look for work. To be more competitive Hong Kong would need to revise its immigration and relocation policies, Dekrey says. Singapore also has a more relaxed way of life, and communication is easier as Singaporeans speak English even among themselves at work. But salaries tend to be higher in Hong Kong, though Singapore has caught up recently, and it may depend on the expat’s preferred lifestyle—Singapore’s pace and education options are preferred by families, while Hong Kong is considered more fast-paced and vibrant. (<http://www.scmp.com>)

October 6, 2010

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Regional Market Summary: Greater Nashville, TN-Area

The Nashville, TN-area has a diverse economy and does not depend on any one industry for its economic base; however, Nashville has not been immune from the recent national economic recession.

A decline in the Nashville residential real estate market began in 2007, and since that time the market has experienced a decline in sales volume, increases in inventory and marketing time, and a decline in value for many market segments. The decline in demand is evidenced by a decrease in historical building permits and sales volume. In 2009, there were 4,933 single-family building permits issued, which represents a 63.6 percent decline from the 2007 issuance figure of 13,567. In addition, in 2009, there were 6,113 single-family homesale transactions, which represents a 33.5 percent decrease from the 2007 sales volume figure of 9,196.

The Nashville metropolitan statistical area (MSA) is comprised of nine counties, which are Davidson, Cheatham, Dickson, Maury, Robertson, Rutherford, Sumner, Williamson, and Wilson. The Nashville MSA experienced substantial increases in unemployment in 2008 and 2009, reaching a peak unemployment rate of 10.9 percent in August of 2009. As of August 2010, unemployment for Nashville

STATISTICAL SNAPSHOT			
TIME PERIOD	AUGUST 2009	AUGUST 2010	CHANGE
Unemployment	10.9%	9.6%	-11.9%
Months of Supply (Inventory)	11.8	15.1	+27.9
Annualized Sales Volume	13,518	14,362	+6.2%
Annualized Median Sales Price	\$165,775	\$168,452	+1.6%
Average Days on Market	88	86	-2.3%

was 9.6 percent, which represents a decline of 11.9 percent from the August 2009, unemployment figure.

Recent trends indicate that mortgages past due and foreclosures have increased, and inventory has increased significantly—27.9 percent during the past year. On the positive side, sales volume increased 6.2 percent during the past 12-month period and the annualized median home price increased 1.6 percent during the same period. However, a large portion of the sales volume increase can be attributed to the First-Time Homebuyer Tax Credit that ended June 30, 2010. This tax credit was an incentive for buyers in the lower home price range but was of little help to the higher price point range, which has taken the full brunt of the market downturn. It should be noted that days on market shown above reported by the Greater Nashville Association of Realtors® (GNAR) is not a cumulative figure and does not

MARKET AT A GLANCE	
Economic Climate	Fair
New Construction	Low
REO Activity	High
Supply	High
Demand	Low
Market Direction	Down
Market Mood	Fair

reflect consecutive withdrawn and/or expired listings.

High inventory levels are of significant concern, causing increased competition among a limited number of buyers for existing homes and there is little incentive for new construction because of a lack of demand. In addition, because of low consumer confidence, interest rates (which are at a 40-year low) have done little to entice buyers.

For the remainder of 2010 through 2011, inventory levels and mortgage defaults will be troublesome. Competition for buyers and increased foreclosure activity will continue to exert downward pressure on both new and existing home values. In the current economic climate, meaningful job growth at both a local and regional basis will be vital to recovery of Nashville's residential real estate market. ■■

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Real Estate Risk Review—Shadow Inventory and Loan Buybacks

The forlorn real estate market continues to send mixed signals. After some good news, due in part to the federal tax credit, the market seems to be back on its bumpy track. Two factors in particular are worth noting—shadow inventory and the increase in loan buyback demands.

According to several sources, the overhang of shadow inventory is at the threshold of making a big impact on homesale markets. Lender Processing Services (LPS), Jacksonville, FL, reports that there are about 2.5 million homes in foreclosure, and 540,000 bank-owned homes (REO). In addition, there are 2.4 million homes where the borrower is more than 90 days past due that are not yet in foreclosure. Add these to the 3 million homes already on the market and at least one estimate indicates that we may be facing a 22-month supply of inventory.

In a normal market, a home enters the foreclosure process after the borrower has missed three monthly payments. Because of the various moratoria, the Fannie Mae and Freddie Mac (government-sponsored enterprises, “GSEs”) workouts, and the federal Home Affordable Modification Program (HAMP), these homes have not become REOs. That may be about to change. As a result, Moody’s projects that the bottom of the market overall will not be reached until the third quarter of 2011. Further, already stressed markets such as Southern California, Florida, Arizona, and Nevada likely will see another 10 percent decline in home values as the shadow inventory hits the market.

We all have been anticipating this shadow inventory impact for some time. But the mortgage market (home purchases have to be financed, after all) has its own challenges. Despite low rates and improved bank balance sheets, a new factor may constrain lenders. The GSEs have begun to vigorously demand that lenders buy back loans that have not performed or lack proper documentation.

Both Freddie and Fannie purchased mortgages from loan originators on the condition that the loan originator buy back loans that do not perform as promised, or that have underwriting exceptions. As of September 30, *The*

Wall Street Journal reported that \$11 billion of buybacks were past their due dates for repurchase. Fitch reports that there may be \$180 billion in GSE loans that qualify for buybacks under contractual reps and warranties.

To add emphasis to the issue, Congress has passed a resolution directing the GSEs to use all legal means to effect loan buybacks from lenders. The \$180 billion is, after all, greater than the amount of taxpayer support provided to Fannie and Freddie. In an election year, recovery of a major portion of these funds is an appealing target. Of course, some balance must be struck between enforcing the buybacks and diminishing banks’ financial strength. If anything close to the Fitch estimate is demanded, lenders will perhaps fairly assert that their ability to make loans will be greatly constrained, and mortgage financing could contract.

Of course, the recent loan documentation mess may slow down foreclosure activity and further complicate the matter. It seems that several large lenders have not carefully handled foreclosure documents. The main complaint is bank officials signed affidavits en masse without verifying the information.

Many documents also were notarized ahead of time to “streamline” the filing process. While one can sympathize with the challenge of handling thousands of documents, real estate laws require careful documentation. One of the oldest of English common law statutes, the Statute of Frauds, stipulates the real estate transfers must be meticulously documented.

The effect of these factors presents challenges to all players in homesale management. Real estate agents and appraisers, in particular, must deal with the uncertainty presented by these unprecedented market forces. Suffice it to say, risk management and expert help in assessing how all of this affects mobility may be more crucial than ever. Those who manage their business well during this time will make an indelible impression on clients, prospects, and the employee mobility industry. ■

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