



## Trends in Corporate Relocation

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## Today's Agenda

- A bit about Brookfield...
- Sources – where to go to be informed!
- Trends:
  - Socio-economic influences
  - Metrics-based Measurement
  - Evolving Program and Policies
  - “Greening”









## Company Overview



## Brookfield Asset Management

- A global asset management company focused on property, power and infrastructure assets
- Long-term, value-oriented investor with 100 years of experience investing, operating and managing
- Over \$90 billion in assets under management
- Approximately 14,000 employees worldwide

| Platform   |  |
|--|--|
|  | <b>Property</b> <ul style="list-style-type: none"><li>•Commercial – office and retail</li><li>•Development and other</li></ul> |
|  | <b>Renewable Power</b>   |
|  | <b>Infrastructure</b> <ul style="list-style-type: none"><li>•Transmission</li><li>•Timberlands</li></ul>                       |
|  | <b>Specialty Funds</b>   |
|  | <b>Advisory Services and Other</b>   |



## Brookfield Residential Property Services

- One of the largest property investors worldwide
- Approximately \$40 billion in property assets

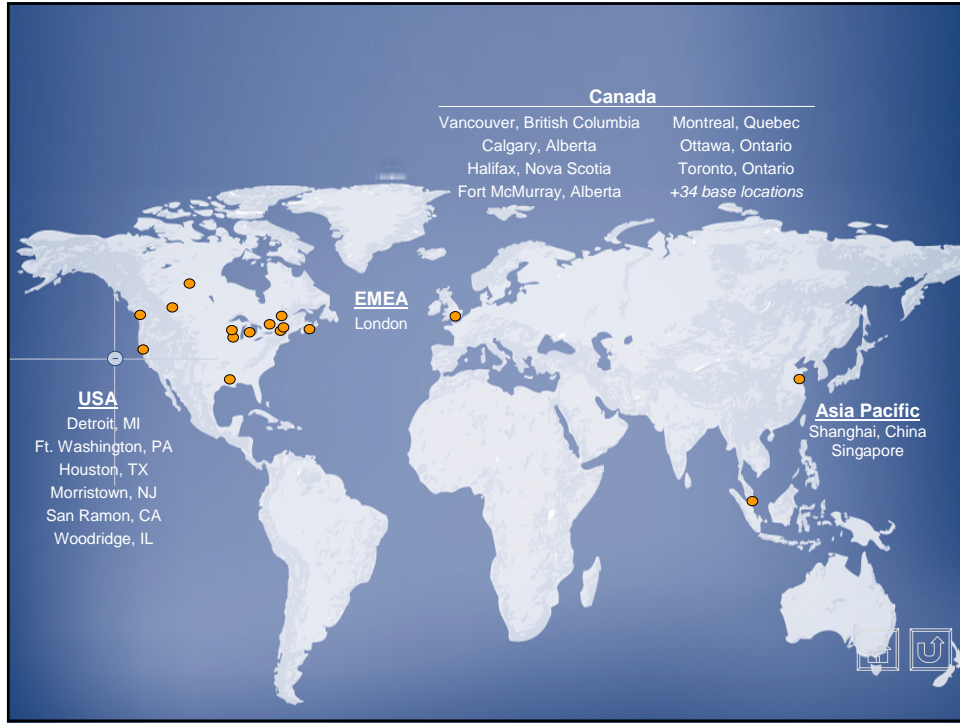
| Commercial Properties   |   | Development and Other Operations  |  |   |
|---|---|---|--|---|
| Office  | Retail  | Development   | Services   | Residential   |
|  |  |  |  |  |



## Brookfield Global Relocation Services

- One of the top 3 relocation services companies in the world
- Approximately 50,000 annual initiations from more than 500 clients
- Over 900 employees
- Profitable operations
- Broad scope of relocation and assignment management services
- Leadership position in US, Canada, Europe and Asia
- Excellent service and client retention results and reputation
- Financially strong, stable parent organization





**Sources**

Navigation icons: Home, Up

Footer images: A row of six small, square images showing various scenes of people working or interacting in a professional setting.

## Information abounds...if you know where to look!

**Brookfield Global Relocation Services.** [www.brookfieldgrs.com](http://www.brookfieldgrs.com)

- Consulting Services Benchmark Reports.
- Global Relocation Trends Survey 2009.

**Canadian Employee Relocation Council.** [www.cerc.ca](http://www.cerc.ca)

- 2009 Employee Relocation Policy Survey.

**Atlas.** [www.atlasworldgroup.com](http://www.atlasworldgroup.com)

- Results 42. Corporate Relocation Survey 2009.

**Primacy Relocation.** [www.primacy.com](http://www.primacy.com)

- Trends Evolution Analysis 2009.

**Accenture.** [www.accenture.com](http://www.accenture.com)

- Global Mobility Trends 2008-2009.



## Trends



## Economic Influences

- Real estate/ mortgage industry downturn
- A reduced sense of entitlement
- Talent management still critical
- ROI



## Demographic Influences

- Female assignees
- Assignments being turned down
- Shorter is better – short term/ unaccompanied/ commuter

Where are they heading?

- China
- US
- UK



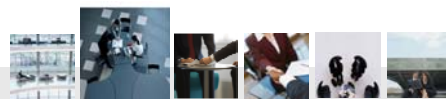
## Assignee Profile

### Assignees are...

- Generation X and Y
- Experienced, Demanding
- Independent
- Tech – savvy
- Younger, single, culturally diverse
- Less loyal = more mobile!

### Assignees want...

- Information faster
- Electronic communication but with a personal touch
- Flexibility
- Security
- Work/ family balance



## Program Trends

- Increase in temporary assignments
- Renegotiated service provider agreements
- Fewer assignments
- Localization



## Policy Trends

What's driving the change? Cost Containment!

- Tiered policies – lump sum
- Payouts on insurance claims – higher deductible/ lower premium
- DIY – self move HHG programs/ container shipping
- Policy cap on special handling/ third party services
- Fewer benefits
- Compliance



## Metrics-based Management

- Reporting
- Bid frequency
- Sophistication of expectations
- Benchmarking and policy reviews

***Strategic solutions wanted!***





## “Green” remains in vogue...

- Paperless relocations – technology as the enabler
- Carbon footprint
- Recycled...everything!



## Ethical Standards...

“Supplier acknowledges that Brookfield GRS is committed to dealing with only those suppliers who share its high ethical standards. Accordingly, Supplier agrees to comply with the **highest standards of ethical and legal behavior** prevailing in Supplier’s respective locations as a condition of Supplier’s continuing business relationship with Brookfield GRS.

Without limiting the generality of the foregoing, Supplier agrees that it will provide **safe and healthy working conditions** for its employees and others working at its work sites; share Brookfield GRS’s commitment to **protection of the environment**; and otherwise conduct all aspects of its business in accordance with the highest standards of **corporate ethics**.”





# Brookfield

