

# REVIEW

A decade of Global Mobility

LOADING 10 YEARS

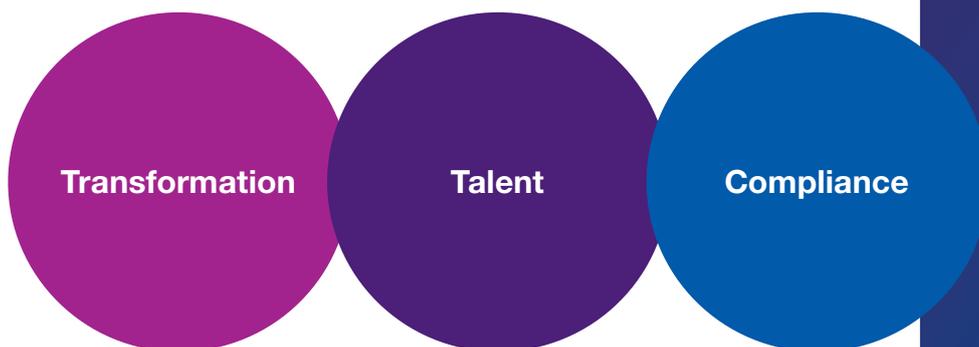


## Executive summary

**We are delighted to present this 10th-anniversary edition, highlighting key research findings from a decade of our annual multi-award winning<sup>1</sup> Global Mobility Survey (GMS) reports.**

Between 2011-2020 a total of 10,226 Global Mobility professionals and 296 business leaders participated in our annual survey.

**This report highlights the top ten Global Mobility trends across the decade, focusing on three themes**



Leadership has high expectations of Global Mobility to deliver a world-class mobility programme, in the capacity of both a strategic business partner and technical advisor, navigating highly complex technical issues. Over the past decade, uncertainty and disruption have strongly influenced the evolution and transformation of workforce and mobility programmes. Thought leadership indicates that they will play a pivotal role in how the events of the next decade will unfold too.

**To succeed, we must continue to evolve our Global Mobility functions at pace, future-proofing them in the context of globalisation, digital innovation and new, more fluid hybrid ways of working.**

# Ten key trends from the last ten years



**01**

A regional approach to Global Mobility service delivery

**02**

Change in skillsets and shift towards a more strategic/advisory contribution

**03**

The growing importance of technology and data analytics as an enabler of Global Mobility functions

**04**

Increased diversity of Global Mobility policies and change in assignment types

**05**

Growth of remote and hybrid working arrangements

**06**

Shift from employer to employee-driven programmes (including core/flex)

**07**

Integration of equality, diversity and inclusion programmes (ED&I) policies, procedures and programmes

**08**

Compliance complexity of new assignment destinations

**09**

Impact of geopolitical and protectionist climates on immigration and safety issues

**10**

Importance of duty of care

# Transformation



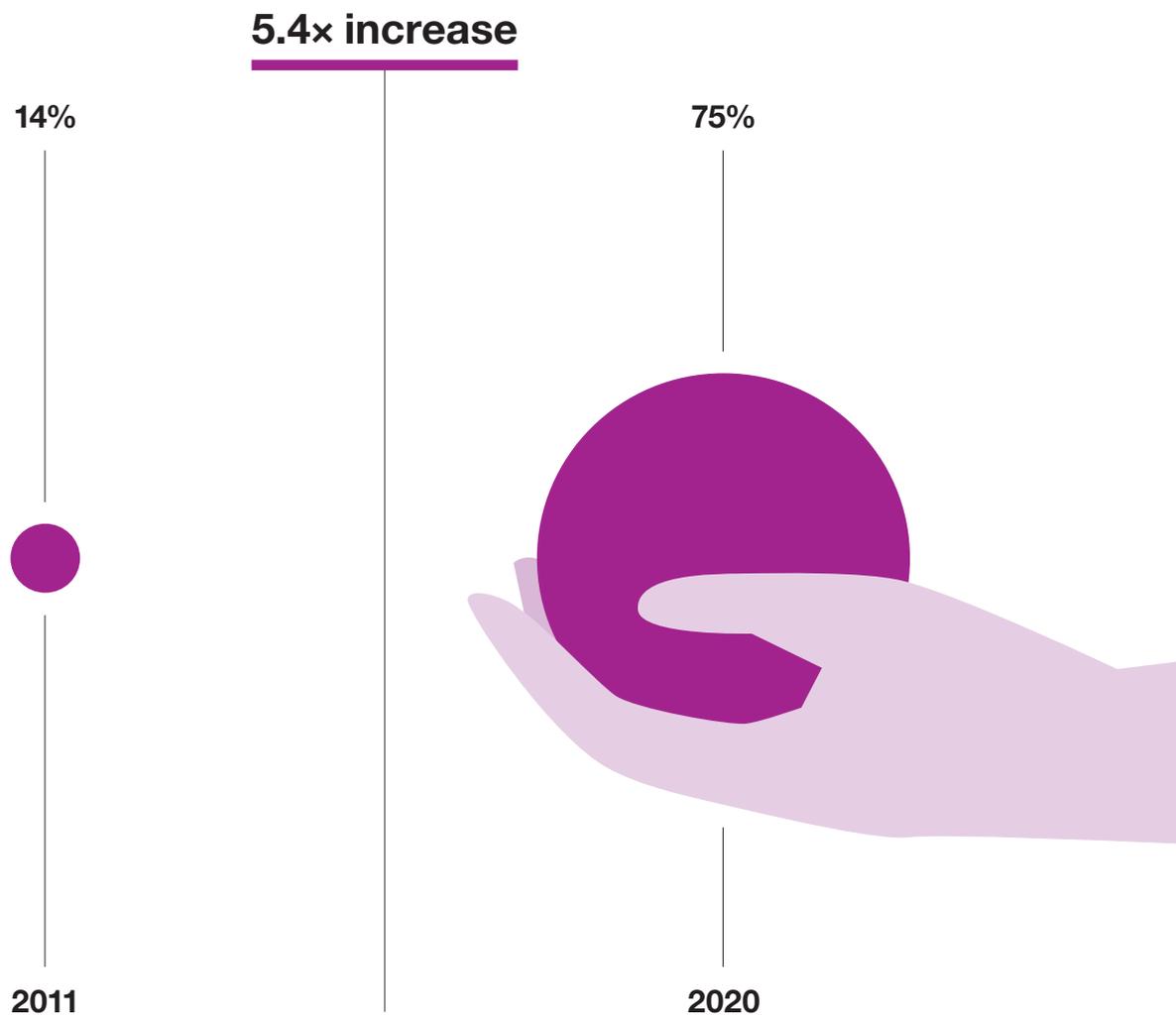
# 01

## A regional approach to Global Mobility service delivery

Global Mobility dovetails to an organisation's business models. Over the past decade, these structures have experienced various evolutions, reflecting shifts in the global and local vision of activities. Intra-regional trade and workforce movement heightened the desire for in-region presence for operational and inter-cultural reasons. However, this new regional model created new challenges to global corporations seeking to maintain harmonised corporate governance.

In 2021, many organisations have transitioned to regional Global Mobility models, yet we have witnessed increased global control from corporate headquarters in both strategic decision-making and operational delivery.

### Global Mobility service delivery model using a regional hubs approach



# 02

## Change in skillsets and shift towards a more strategic/advisory contribution

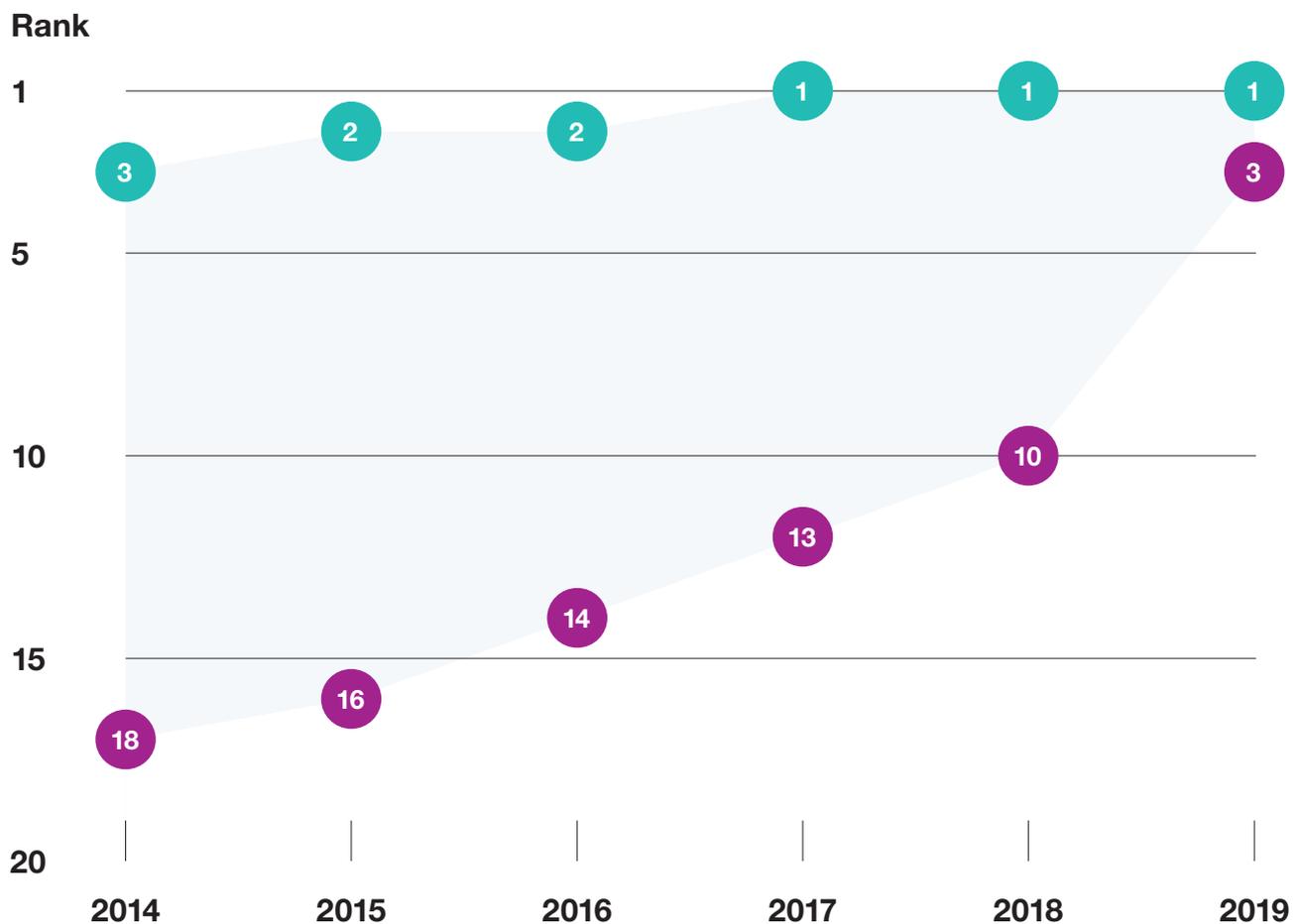
In the past four years, we have tracked the activities Global Mobility teams undertake versus those that they feel they should be doing. Global Mobility reported their increasing desire to be more involved in strategic planning activities which, interestingly, aligns with business leaders looking for a more strategic and advisory contribution.

Mobility's role morphs into uncharted troubleshooting and moves away from the traditional approach of only managing those on long-term assignments, expanding to the entire mobile population. This transition of roles and responsibilities will be critical to the success of the Global Mobility function.

The change in skillsets is best illustrated by the figure of 27% trade-off of existing Global Mobility roles to incorporate newly created roles, e.g. data analytics and systems, reported in our 2020/21 GMS. Restructures will cause some traditional jobs to disappear, and the future roles of the Global Mobility team will likely appear very different.

Rank in order of importance for strategic workforce planning

Currently spend time ● Should spend time



# 03

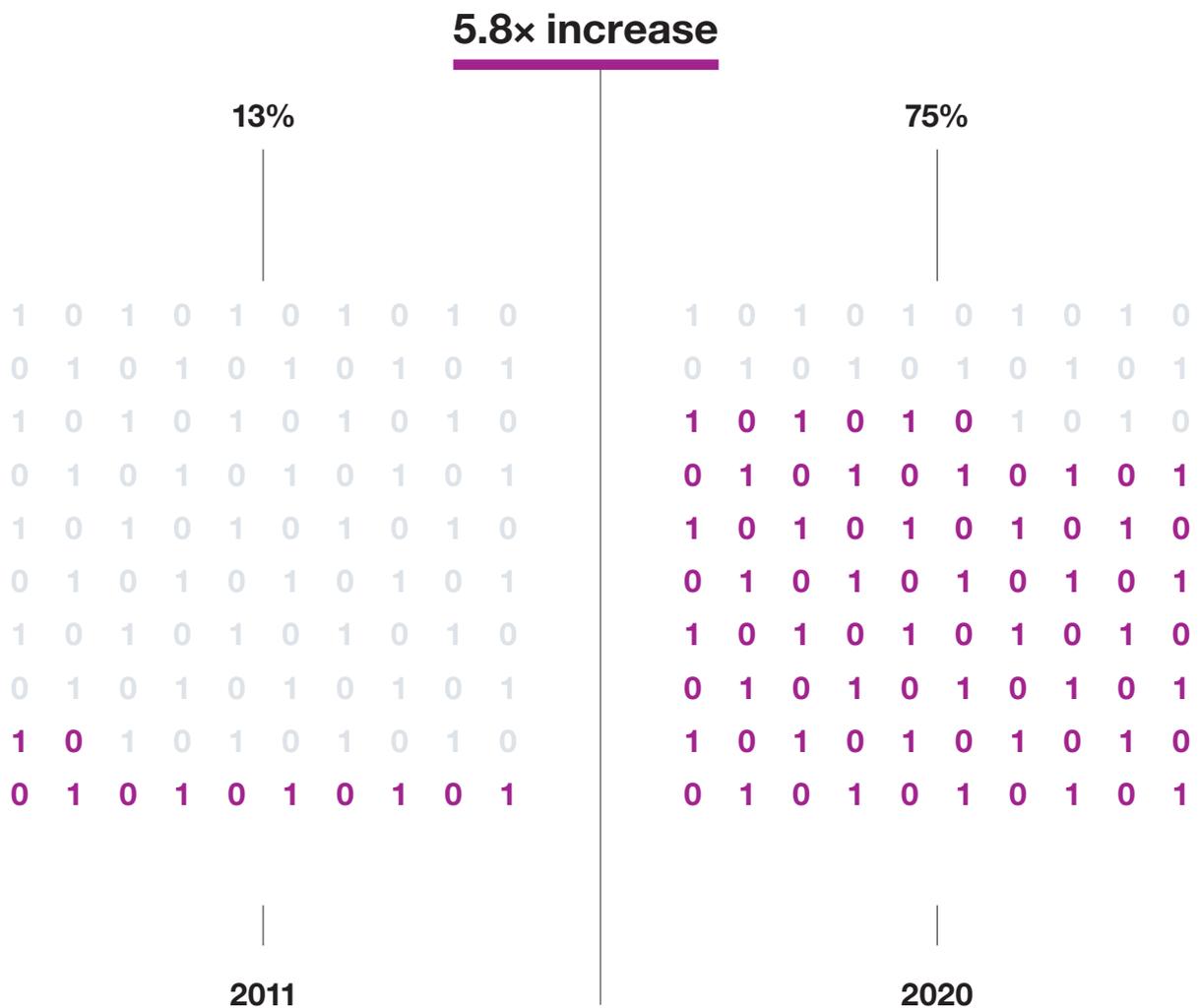
## The growing importance of data analytics and technology as an enabler of Global Mobility functions

A decade ago, it was mainly the Big Four accountancy firms who had developed specialist Global Mobility/tax platforms with HR and Global Mobility modules. In 2020 63% of Global Mobility professionals were planning to invest in Global Mobility software over the next two years. Over time, several disruptors with Global Mobility software and systems have entered the market. For example, in recent years, we have seen a rise in technology software and platforms specifically for business travel.

Securing the buy-in and investment from key stakeholders to embrace the new digital era continues to prove problematic for some Global Mobility functions. This is primarily due to the business not being familiar enough with the compliance requirements and the importance of tracking and reporting on a range of interconnected data. Education and a compelling business case are the solutions to overcoming this obstacle.

Regarding data analytics, Global Mobility professionals continue to suggest, 56% in GMS 2020, that total cost data is the reporting priority for the wider business.

### Specialist Global Mobility software usage



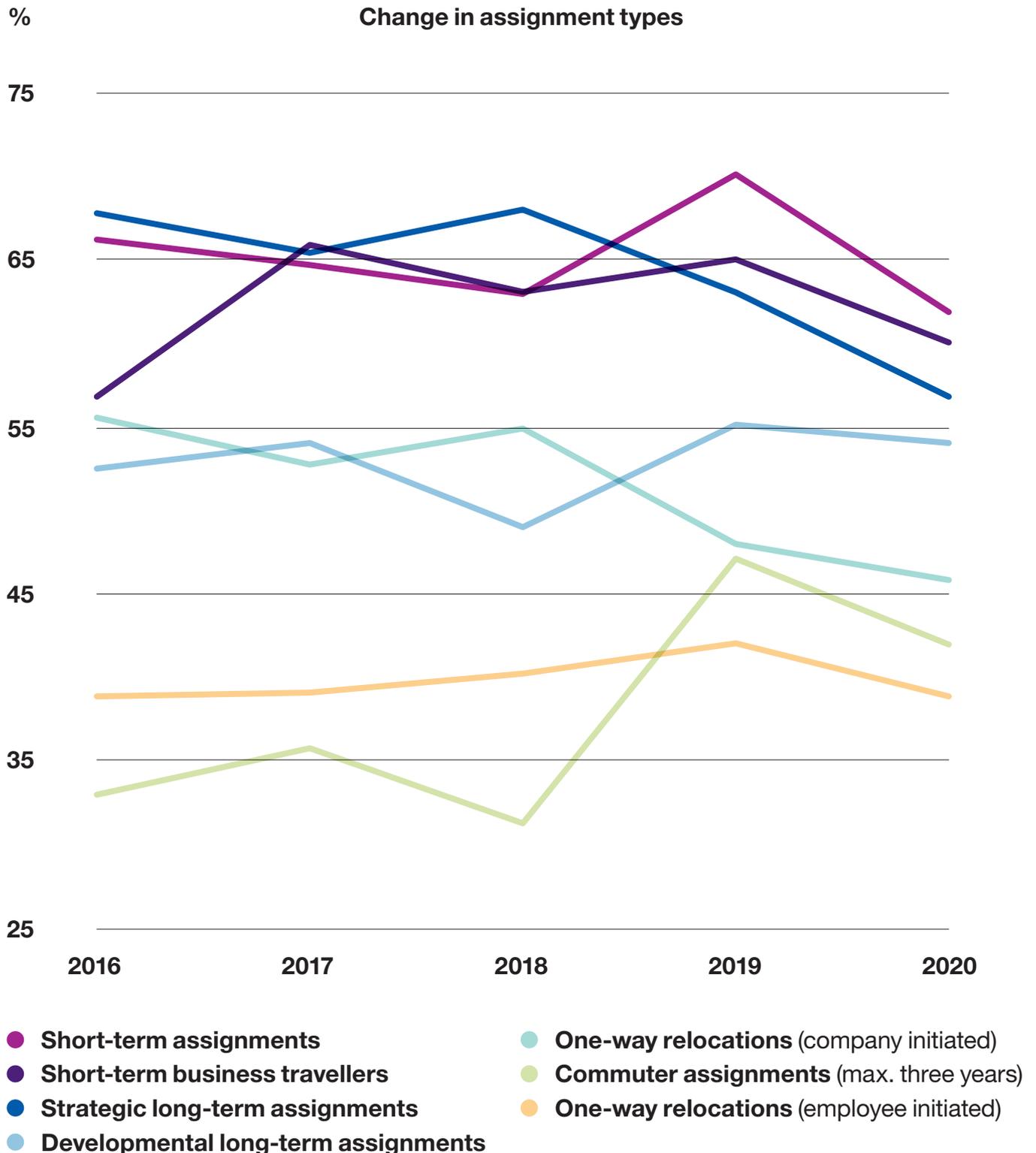
# Talent



# 04

## Increased diversity of Global Mobility policies and change in assignment types

We observe a broad range of Global Mobility policies across multinational organisations, reflecting both the change in working patterns and the increasing diversity of mobility opportunities. For example, the traditional strategic long-term assignment (LTA), the most prevalent assignment type in 2016, was overtaken by short term assignments (STAs) and short-term business travellers (STBTs) by 2020.



Hybrid working arrangements have been accelerated by the COVID-19 pandemic and integrated alongside more traditional working patterns. When asked in 2017, over a quarter of respondents (29%) anticipated a rise in virtual assignment over the next five years. This change in working practices is undoubtedly a fantastic tool for attracting and retaining top talent. However, cross-border remote working presents a considerable challenge for Global Mobility functions to manage, with almost half of mobility programmes citing them as an obstacle to them achieving objectives. There's been a growth of virtual assignments over the last three years. An increasing proportion of Global Mobility teams have seen virtual assignments as a significant change and challenge.

### Mentioning virtual assignments as a main challenge to achieving GM objectives



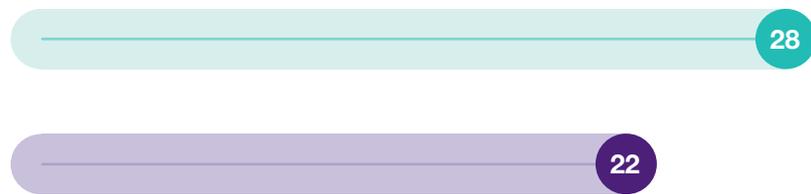
With new generations entering the workplace, employee and employer expectations of international experience and the Global Mobility programme have evolved. As a result, organisations have been compelled to offer more flexible assignment options to secure and deploy the right talent. With the development of policy types between 2019 and 2020, teams looked to give assignees more flexibility and there were fewer companies who weren't planning to change their policies at all.

The introduction of core/flex policies allows organisations to ensure compliance and duty of care, e.g. tax, immigration, safe housing) whilst allowing business to make choices aligned to their objectives and offering assignees some element of choice to adapt to their personal circumstances. In our 2020/21 survey, a third of respondents had core/flex policies already in place in their organisation. In addition, over a third of respondents are considering introducing it in the next six months.

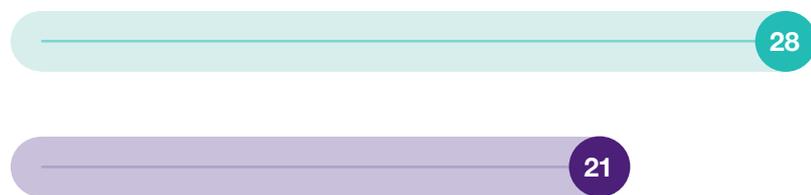
### Development of policy types (%)

2019 ● 2020

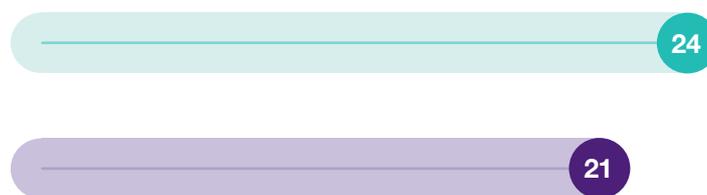
We are moving to a lump sum policy and giving employees complete flexibility over personal choice



We have moved away from international assignments to a framework of local to local plus arrangements



We will move to policy segmentation based on business talent drivers to build policies based on need not time



% 0 10 20 30

# 07

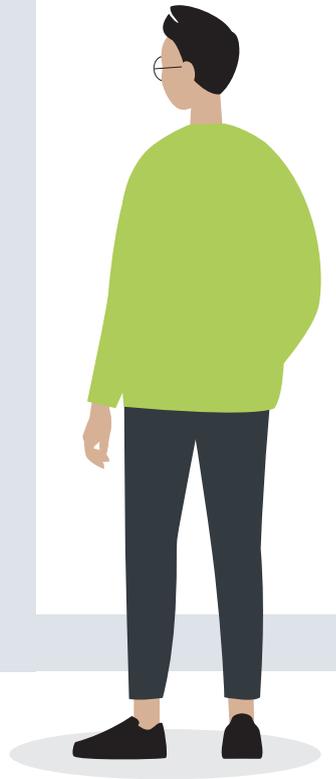
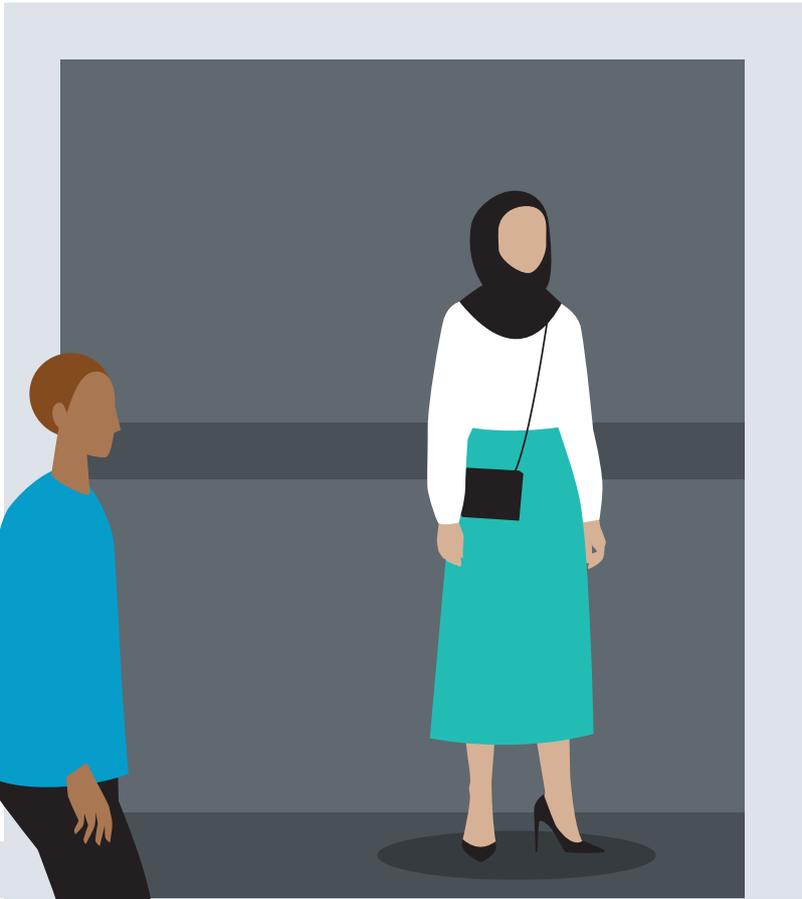
## Integration of equality, diversity and inclusion (ED&I)

ED&I policies drive progressive organisations to ensure that their people, process and policies attract both internal and external talent to undertake international career development initiatives. For example, included in interventions impacting the Global Mobility function over the next 24 months, the need for more cultural diversity was identified. Yet, it had reduced in importance from 30% in 2018 to 24% in 2020. This is an area of opportunity for organisations once the pandemic enables more consistent cross border movement.

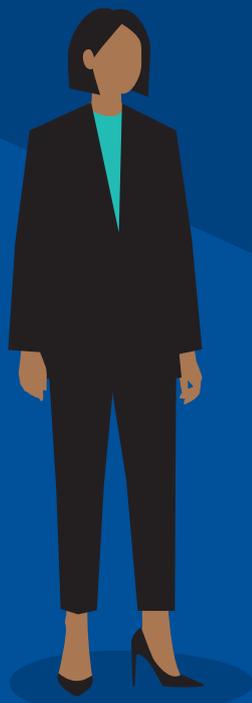


24 2020

24



# Compliance



In the past four years, we have tracked the activities Global Mobility teams undertake versus assignment locations have become increasingly diverse and challenging as organisations pursue growth opportunities in new markets. 40% of participants relocated employees to new destinations. However, many of these jurisdictions have complicated laws and regulations which pose barriers to mobility in an era (pre-pandemic) where talent is being deployed overseas more frequently.



# 09

## Impact of geopolitical and protectionist climates on immigration and security issues

Geopolitical and socioeconomic events over the past decade, whether it be terrorist activities, changes in political administrations/unrest, BREXIT or major health events (SARS, MERS, Ebola, COVID-19), have elevated immigration, safety and security issues to the top challenges that mobility teams face when recruiting talent for overseas roles. The utilisation of experts to navigate these issues will be imperative for organisations to mitigate risk and achieve a successful deployment.

**2014**

Main challenges to recruit talent for overseas roles

**Immigration restrictions**

Rank **4**

**3**

**2**

Rank **1**

**2020**

Main challenges to achieving GM objectives

**Immigration compliance**



2014

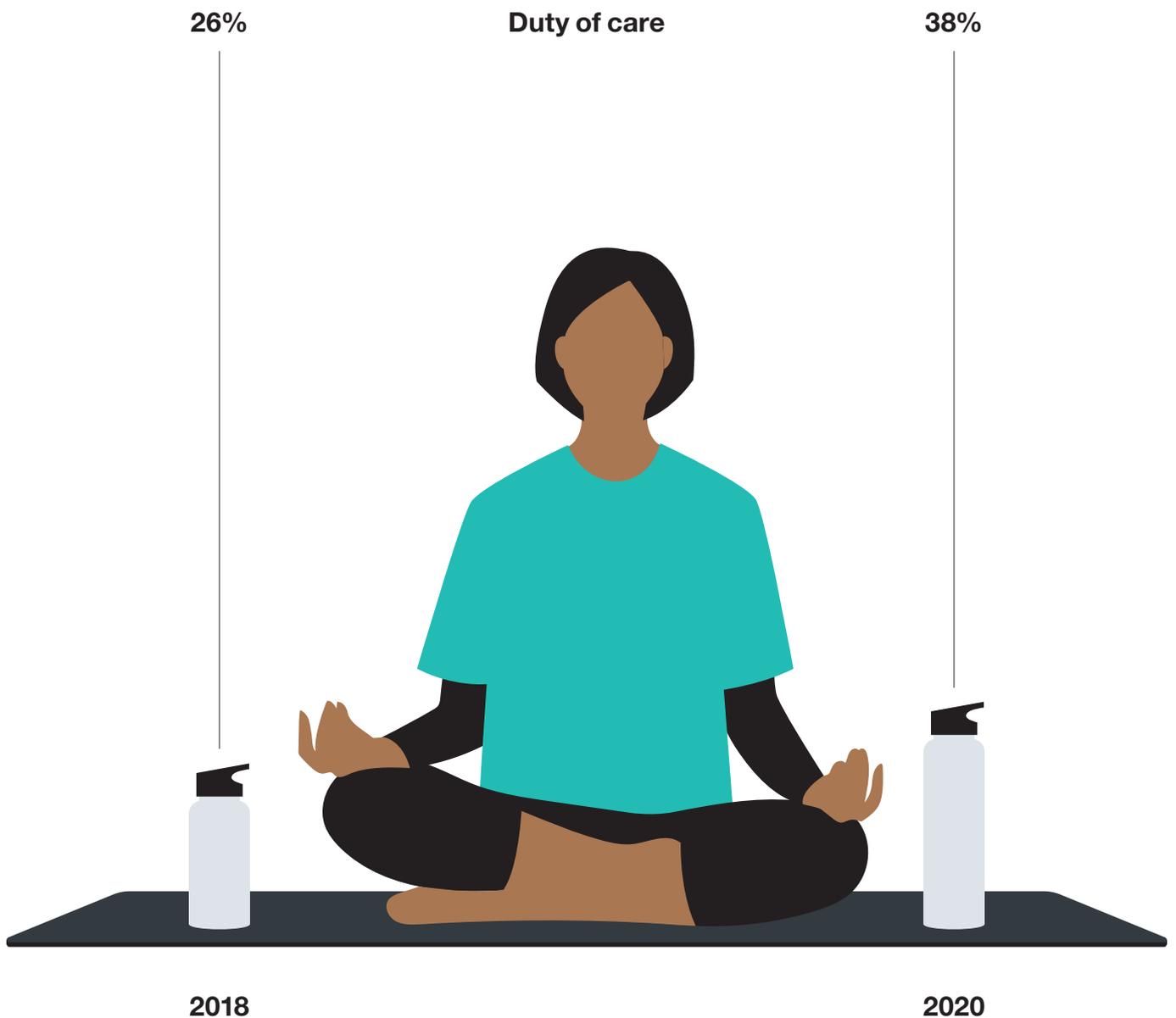
2020

# 10

## The importance of duty of care

Duty of care is a top priority for Business Leaders increasing from 26% in 2019 to 38% in 2020. This is likely to be in recognition of the pandemic and increasingly difficult geopolitical relations between the largest nations in the east and west, affecting economic trading relations, foreign investment and thus international talent mobilisation. Global Mobility must mitigate personal risk to employees as well as reputational or financial risk to the organisation. Pre-emptive action will mitigate potentially expensive and damaging outcomes.

### Top priority for business leaders when preparing internationally mobile employees



## Predictions for the next decade

Projecting forward another ten years, we anticipate continued transformation for Global Mobility to be agile in adapting to changing priorities. At a macro-level, possibly doing more with less, especially as overhead costs and the fixed costs of permanent headcount erode. Overlapping this agenda is the evolving role that artificial intelligence (AI) will play in the future workplace.

### Transformation

- Global Mobility remains a standalone function or is absorbed into another department such as a people focussed business, talent or analytics team.
- Global Mobility is required to provide bespoke personalised solutions to mobility scenarios as the workforce demographics and expectations evolve.
- Skill set in Global Mobility will include AI delivering all core Global Mobility operational tasks.

### Talent

- Evolution from segmented policies to personalised assignment packages to meet the demands of tomorrow's workforce.
- A higher proportion of contingent workers fulfilling contracts for work and international gigs (not contracts of employment or assignment).
- An internal and external marketplace exists, representing a transition from the concept of a workforce to a skills/talent pool.
- Blind selection integrated into the recruitment and selection processes to support achievement of ED&I targets.
- An increase in part-time/flexible assignments and workcations, incorporating supplemental learning and development and/or corporate social responsibility elements.
- A widening of the assignee pool, improved duty of care, health and wellbeing.

### Compliance

- A continuation of globalisation and mobilisation of talent from developing markets to more traditional developed markets in order to support the continued high growth trajectory in the world's fastest growing economies.
- Some global multinationals have expanded so significantly that they have outgrown individual countries' economies:
  - Treated as a single entity by international tax and immigration authorities, e.g. liable to a global corporate tax rate and in possession of global visas/work permits;
  - Easing the compliance surrounding the deployment of talent worldwide and boosting jurisdictions' revenues.
- ESG is at the core of Global Mobility's strategy and programme.
- Sustainable assignments are a fundamental expectation of the mobile talent pool and a mandatory requirement of clients and investors.

## Conclusion

Organisations have undergone a reset due to the pandemic and leaders are more aware of the data and potential contribution of Global Mobility. The growing influence of digitalisation is also likely to enable Global Mobility advisory teams to create more insightful contributions as they flourish to become an extension of business teams rather than a purely transactional support function.

Between 2016 to 2020, 80% of Global Mobility professionals consistently agreed or strongly agreed that employees who have undertaken international assignments achieve greater career progression than employees who have remained in their home organisation or headquarters.

There has been considerable evolution in the talent agenda and how it has translated into Global Mobility policy strategy within the past decade. It is evident that internal company talent priorities, combined with external factors (future workforce/digital innovation), will force mobility functions to rapidly adjust to the new era of mobility. We witness a transformation from managing a ring-fenced group of traditional mobile employees to enabling the rapid, regular mobilisation of an entire global workforce.

Whilst mobility strives to increase focus on strategic activities compliance continues to present a challenge, both in terms of limiting the speedy deployment of talent overseas and the level of time and resources dedicated to managing it.

The definition of compliance has expanded far beyond the scope of a traditional mobility function a decade ago. Mobility professionals now need a robust understanding of tax and immigration compliance, delivering a higher corporate duty of care to mobile employees whilst keeping in line with a stricter level of corporate governance and expectations from investors. There are many factors at play here.

Compliance management remains a primary barrier to mobilising talent and achieving strategic objectives. With a higher duty of care obligation, organisations have struggled to secure investment or buy-in from leadership to meet those standards adequately. Global Mobility professionals should continue to educate stakeholders surrounding the potential costs, reputational risks and wider ramifications of their organisations taking no action.

Keeping talent healthy, safe, and secure in the progressively diverse, challenging assignment locations will be imperative.

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