

REPORT



REPURPOSE

A focus on the Pharmaceutical & Healthcare
sector from the Global Mobility Survey 2020/21

Mobility

has become

more complex

and uncertain,

and the

Global Mobility

team is now

more visible

to leadership.

This report is based on research findings from our Global Mobility Survey (GMS), REPURPOSE: CHALLENGING CHANGE 2020/21, exploring the key trends and impact of the COVID-19 pandemic within the Pharmaceutical and Health (P&H) sector.

This report highlights the progress made within mobility functions in the P&H sector compared with all sectors. Our commentary focuses on two key themes.

Transformation

Working in new ways and embracing change, looking for smarter, faster ways of operating are now part of the new order, and Global Mobility (GM) plays a critical role within this transformation.

There is certainly a higher expectation of structural change within the P&H GM operational model with projected growth in new skillsets to focus on data analytics, tracking of total programme costs and striving to maximise the ROI on people investments.

Technology is playing a pivotal role in the evolution of the mobility function. However, despite being a sector that performs strongly with impressive levels of innovation/investment in virtual/e-health solutions, our data reflects that P&H is behind the curve with investments in mobility technology.

Talent

Our research clearly highlights the necessity and desire of GM professionals to transform their roles to focus on value-based activities such as talent planning, advisory support, enhanced analytics, and risk profiling.

P&H programmes have achieved better diversity ratios compared with all sectors and identify this as a key strategic goal in order to support the P&H industry's broader objective of aligning with the diversity of their customer base. This initiative may require broader repurposing of HR and business thinking and GM can play a role in catalysing change, especially given their increased visibility with leadership during the pandemic.

We believe these will be key for sustainability as organisations seek to grow or bounce back from the pandemic.

Please note: Some percentage totals exceed 100% because respondents were able to select multiple answers.

TRANSFORMATION

Given the societal importance of the P&H sector, contributions by Global Mobility teams to talent decisions are now more significant than ever.

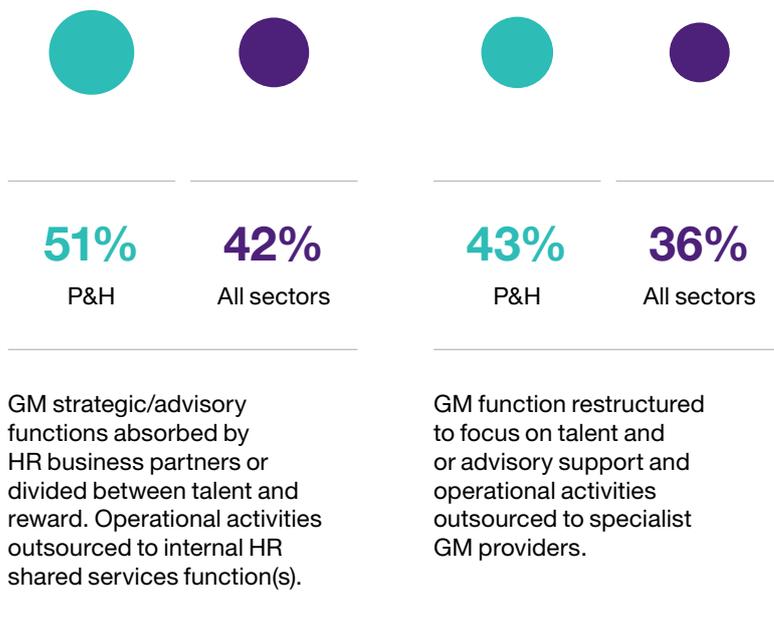
The building blocks for a more strategic role

As a sector in expansion and evolutionary mode, GM teams have the advantage within their business of growth rather than a consolidation mindset, as reflected in **Fig 1**. The two highlighted scenarios would allow for greater attention by mobility professionals on talent, and more outsourcing of operational activities to HR or an external third party.

This team structure evolution is reported as more likely in the P&H sector than the GM profession generally. The real decision is whether to opt for an internal shared service team or external specialist GM provider or a combination of both.

P&H mobility teams are more likely to acquire a redefined role focused on strategic advisory GM business partnering, with reduced operational involvement than average across all sectors. We could also see a trade-off of existing roles in order to incorporate new roles in data analytics and systems. **Fig. 2** (pg. 5) suggests that the greatest part of GM's time is currently being taken up with supplier management instead of strategic workforce planning. These findings reflect that P&H GM teams want to focus on critical areas of strategic workforce planning, costs, and risk management.

Fig. 1: How GM team structure will evolve over the next 24 months—top two



How to best demonstrate talent ROI

Fig. 3 (pg. 5) highlights that nearly half of P&H professionals report on key talent metrics to demonstrate value from GM, compared to just over a third for the average across other sectors. Also evident is a focus on reporting ROI for completed assignments.

Long-term career success of repatriated/serial assignees is one of the top three methods used to demonstrate value, also reflecting the measures used to track the success of international work arrangements at **Fig. 4** (pg. 5).

Post-assignment, the most common method used is to monitor general career progression—such as promotion and annual performance ratings for two years. While this is true of all sectors, it is even more likely for GM in the P&H sector. Similarly, tracking annual performance assessment ratings, a minimum of two years after completing the assignment, is the second most common measure.

Fig. 2: Where GM spend most time versus should be spending their time—biggest differences

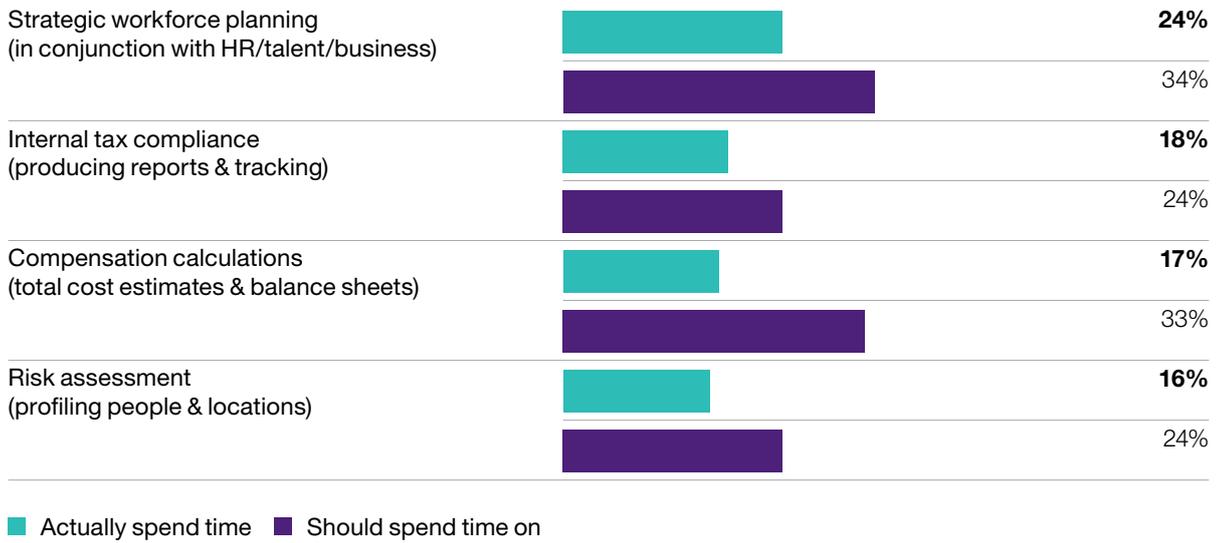


Fig. 3: Methods used to demonstrate GM's value to wider business—top four

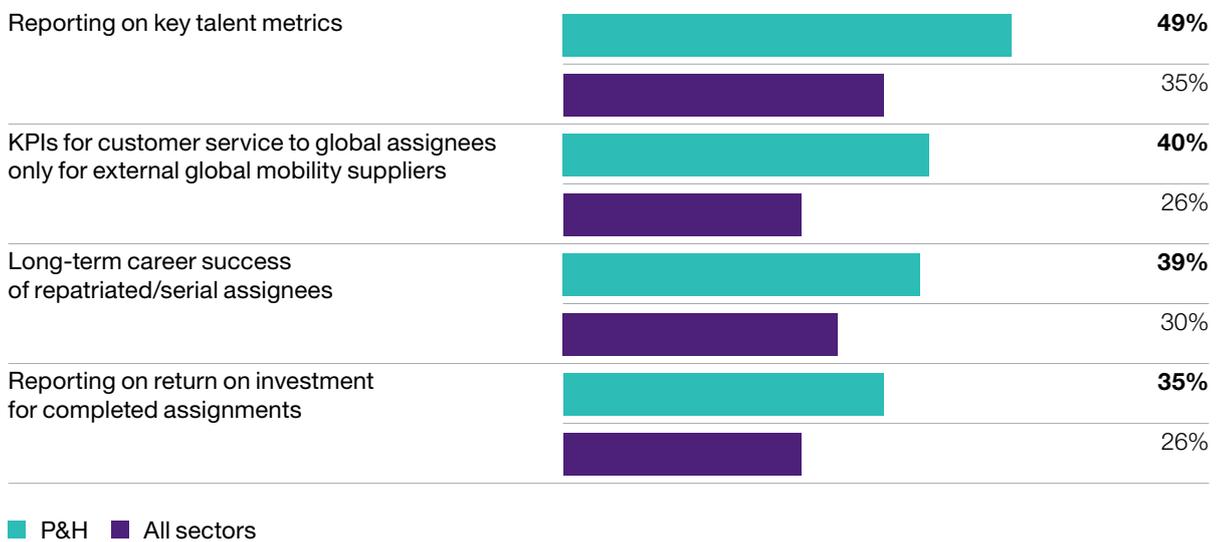
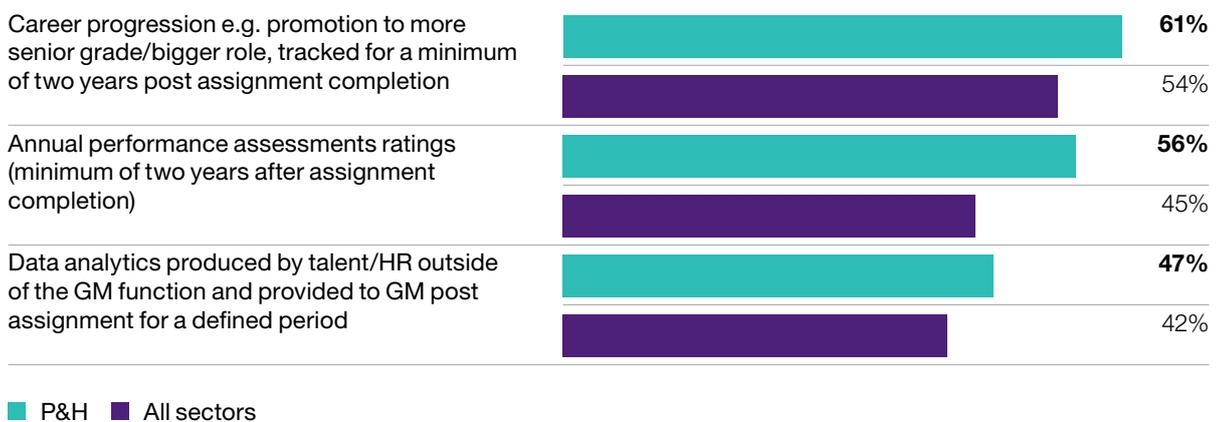


Fig. 4: Measures used to track the success of international work arrangements—top three



Bridging the gap in data analytics

There seem to be several gaps between the amount of data P&H GM teams are currently providing and what they feel they should be providing. As explored in **Fig. 3** (pg. 5), talent metrics are already important reporting areas for GM professionals. **Fig. 5** shows the P&H sector believes they should be focusing more on talent management ratings. In **Fig. 6** GM professionals in the sector outline a range of challenges preventing them from sharing more data around their organisation: Most notably compared to other sectors, there is a perceived lack of budget for the desired data collection resources. This suggests that greater engagement is required with both HR and business leaders to understand what metrics and data enable them to perceive more value. GM professionals in the sector also outline a range of challenges preventing them from sharing more data around their organisation.

Fig. 5: Data GM teams are currently providing to the wider business versus data they should be providing—biggest differences)

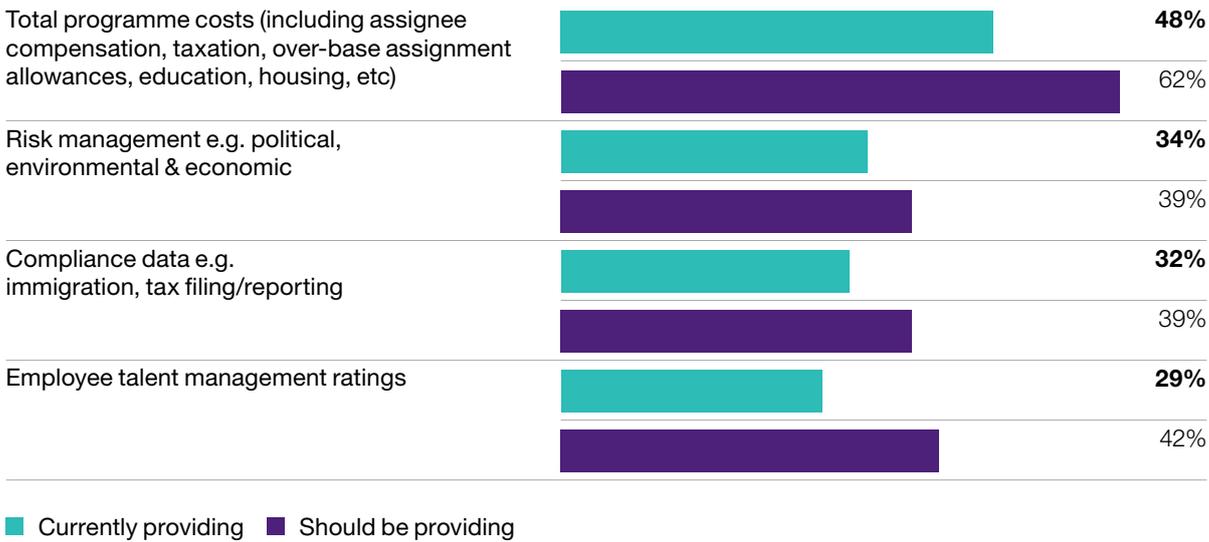


Fig. 6: Barriers to the provision of data to the wider business



TALENT

There is an optimistic picture for growth across all assignment types for P&H, reported below. This contrasts with the overall talent findings where GM teams expect a decline in short-term and strategic long-term assignments, as well as assignments under three months for international business travellers.

Expected growth of virtual work arrangements

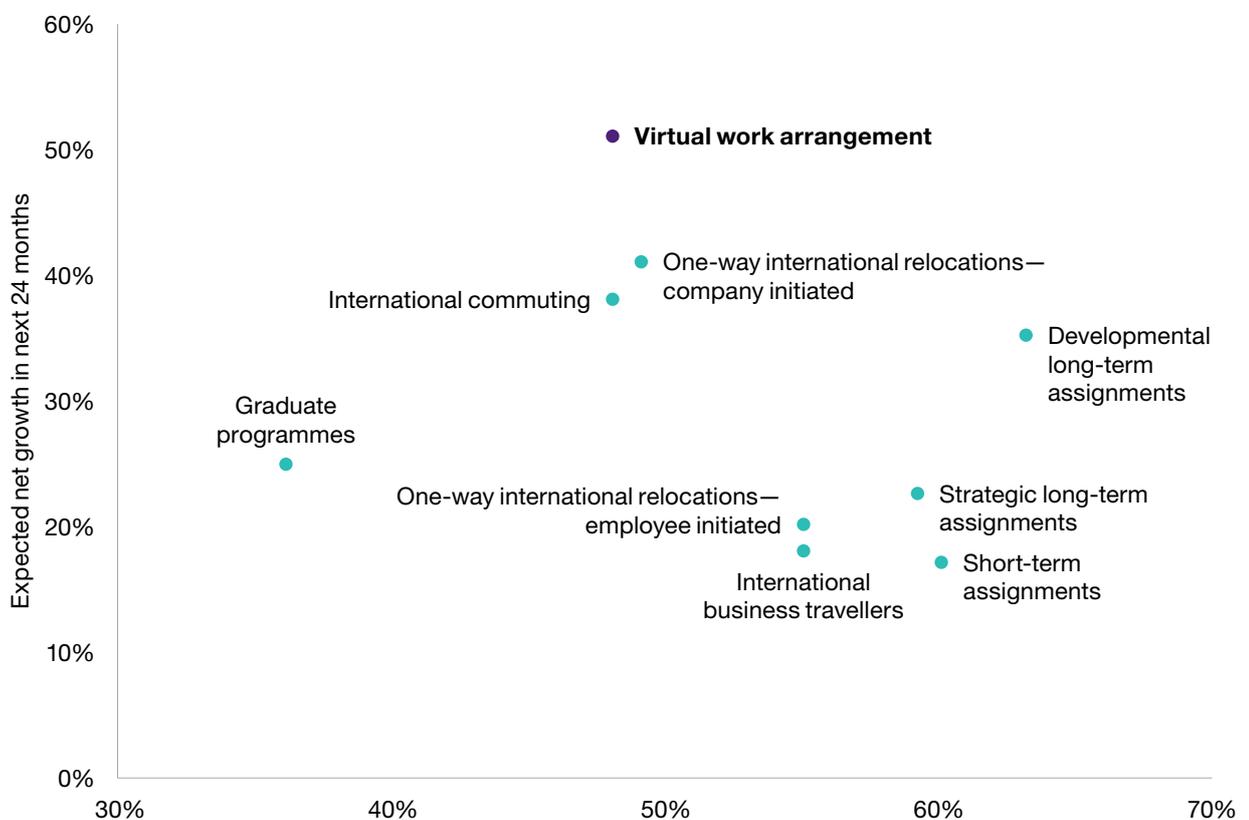
The highest expected net growth is for virtual work arrangements. Nearly half of businesses in the P&H sector have already undertaken this type of assignment in the past year, compared to 40% across all sectors.

This is a sector that is buoyant, evolving, and pivotal not only in response to the current COVID-19 pandemic but also in a wider societal contribution for more evenly distributed access to healthcare across the globe and the provision of healthcare for an increasingly ageing global population.

The expectations on the sector are only going to increase, which will require more talented specialists and professionals with the global experience of working in matrix organisation structures. Pressure will be placed on GM to ensure that the right talent is attracted and mobilised to be in the right place at the right time.

In a sector where the competition for the best scientific talent is key, facilitating the personal needs and requests of employees are a fine balancing act, where the preferred solution may be teams working together in R&D and other key centres. However, technology has proven that virtual working can be one feasible solution in conjunction with physical international deployments.

Fig. 7: Businesses undertaking assignment types over last 12 months and expected growth in each type of assignment for next 24 months (P&H)



Increased diversity

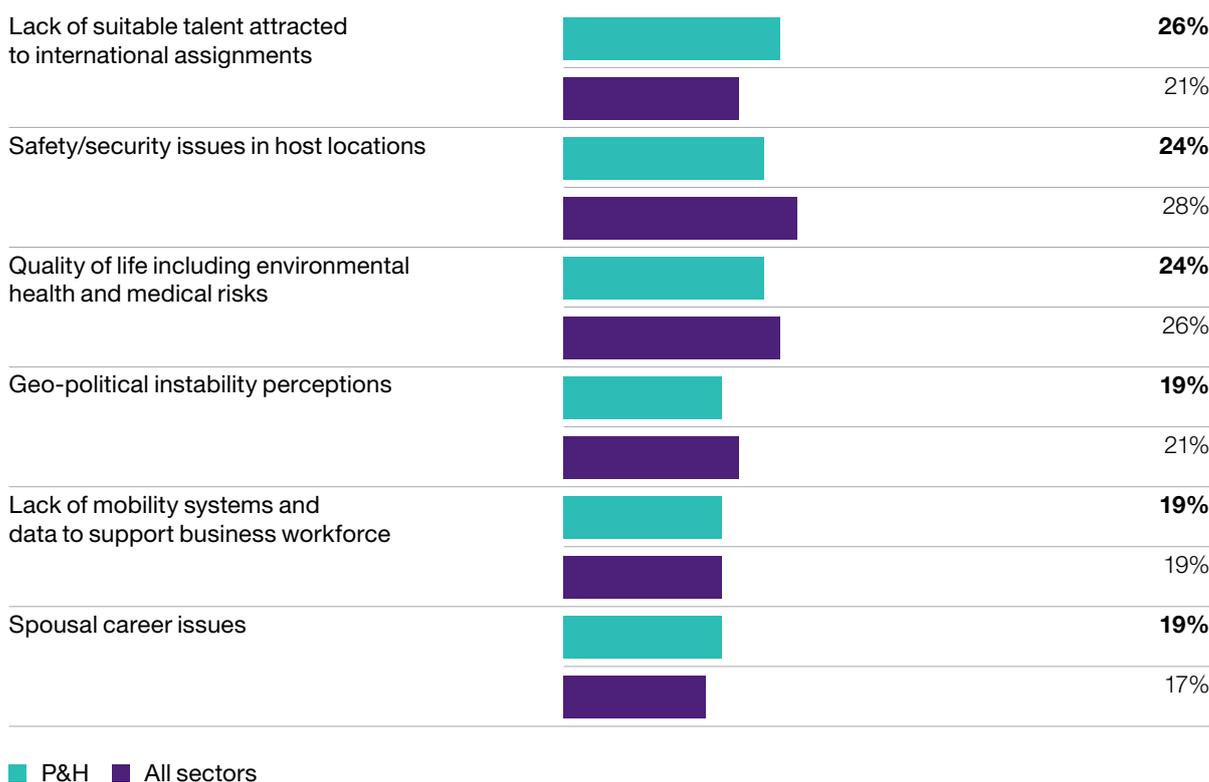
In terms of gender diversity for the employees undertaking these arrangements, the overall gender split between male (60%) and female assignees (39%) for P&H is more balanced, in comparison to the average for all sectors (67% versus 32%)². We highlighted in **Fig. 1** (pg. 4) that organisations in this sector are exploring different structures and roles and exchanging existing roles for new competencies, such as data scientists. It is noteworthy that this has been referenced in the Deloitte Insights—2021 Global Healthcare Outlook¹ together with their recognition of the imperative to promote workplace diversity and inclusion.

Please refer to the endnotes for information.

Three main challenges facing GM professionals

In **Fig. 8** we see the talent challenges facing organisations and GM. It focuses on supporting new types of international work arrangements, a shortage of the right talent and a lack of employee engagement for both career and personal family reasons. It therefore supports P&H GM professionals recalibrating their focus more on strategic workforce planning, combined with managing and advising in the area of risk.

Fig. 8: Main challenges expected to achieve Global Mobility objectives over the next 24 months



Core/flex arrangements

This is an area where the P&H sector appear to be ahead of other industries. **Fig. 9** highlights giving HR/GM and business management more flexibility with capped budgets as the significant drivers, combined with providing employees with more choice within their budget.

Fig. 9: Reasons for implementing/considering a core/flex policy framework

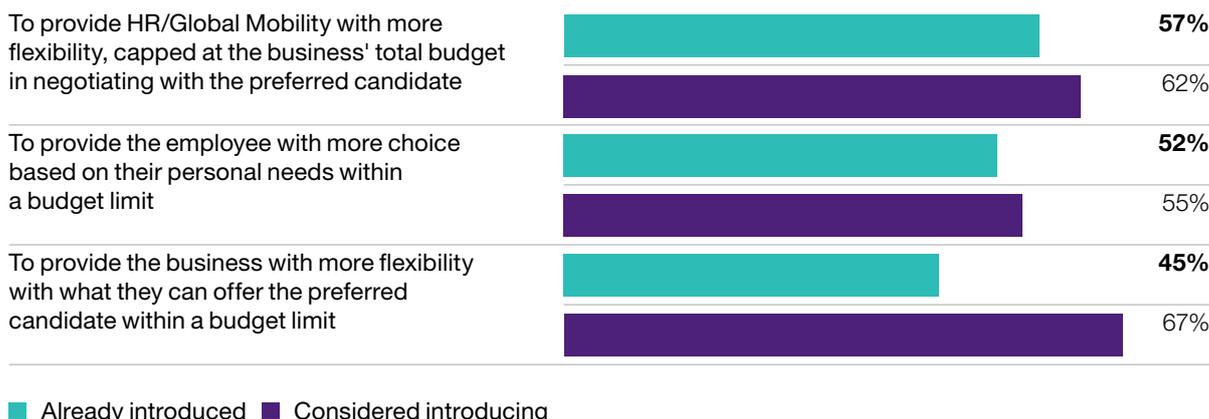
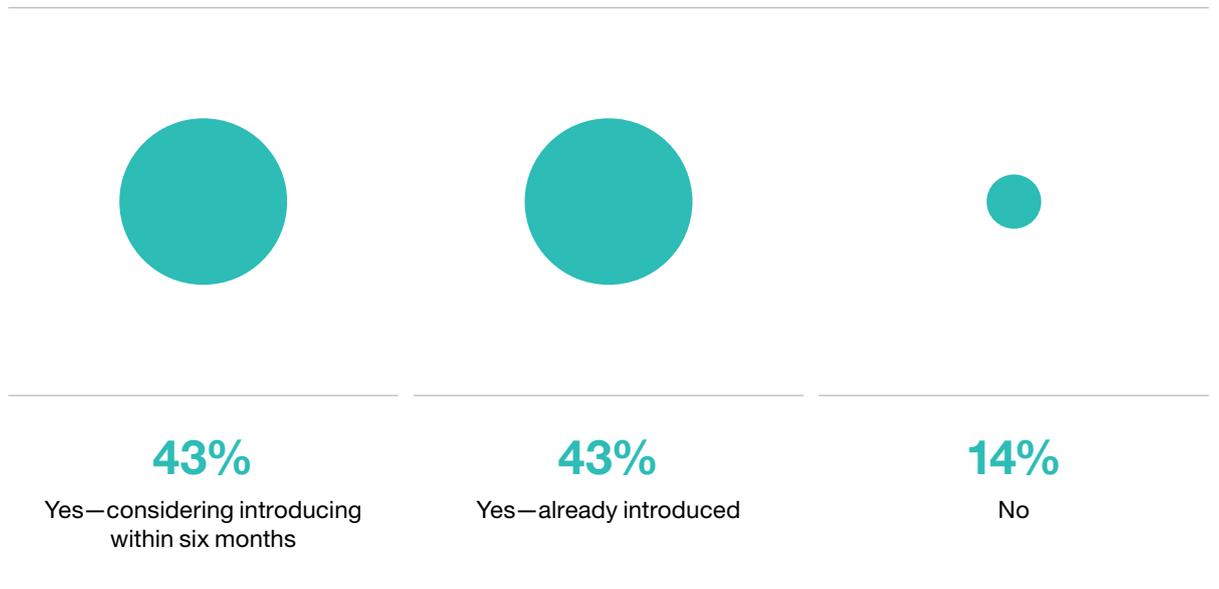
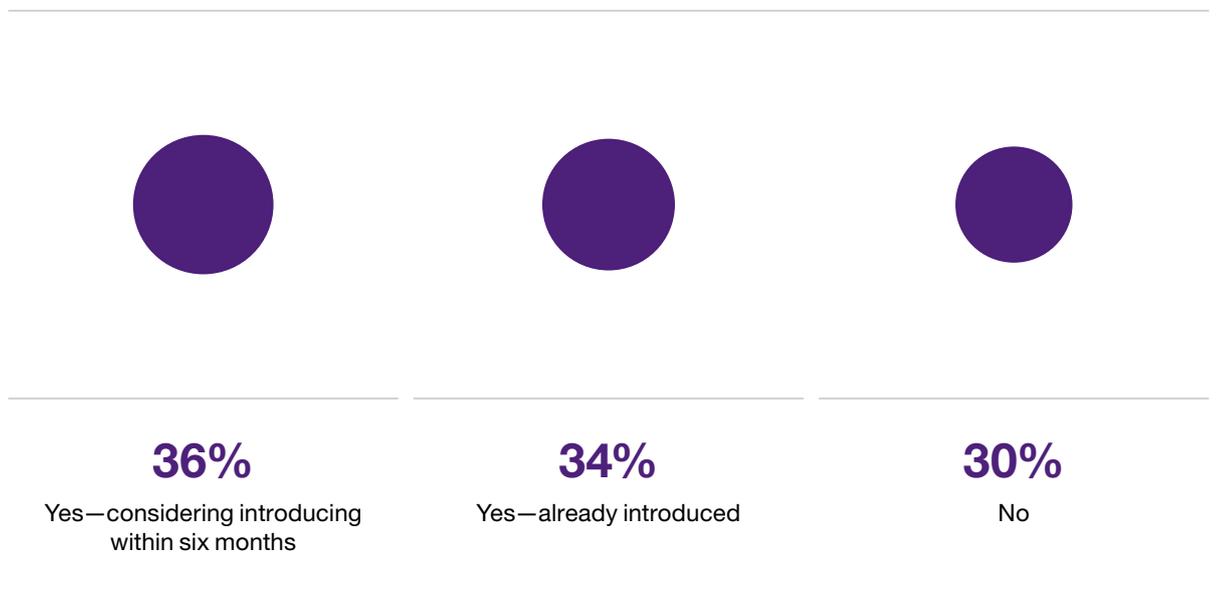


Fig. 10: Introduction of new policies to provide more flexible arrangements within a mandatory/flex (Core/Flex) policy framework

P&H



All sectors



International business travels and compliance

As international borders start to re-open on a more consistent basis and organisations reconsider the deployment of international talent, tracking not only the business visit/work requirements but also the pandemic-related protocols (possibly in multiple destinations) will continue to be complex for GM and HR teams in all sectors.

ISO 31030 is due to be launched in 2021

ISO 31030 will become the new global benchmark for travel risk management to help organisations make the right decisions to support their employees within a framework of good practice guidance. Safety and security are key elements of duty of care. Maintaining up to date information on the ever-changing immigration visa and COVID-19 related regulations will become ever more essential to ensure compliant business travel. The amended European Posted Worker Directive also presents a new compliance challenge for business travellers in Europe.

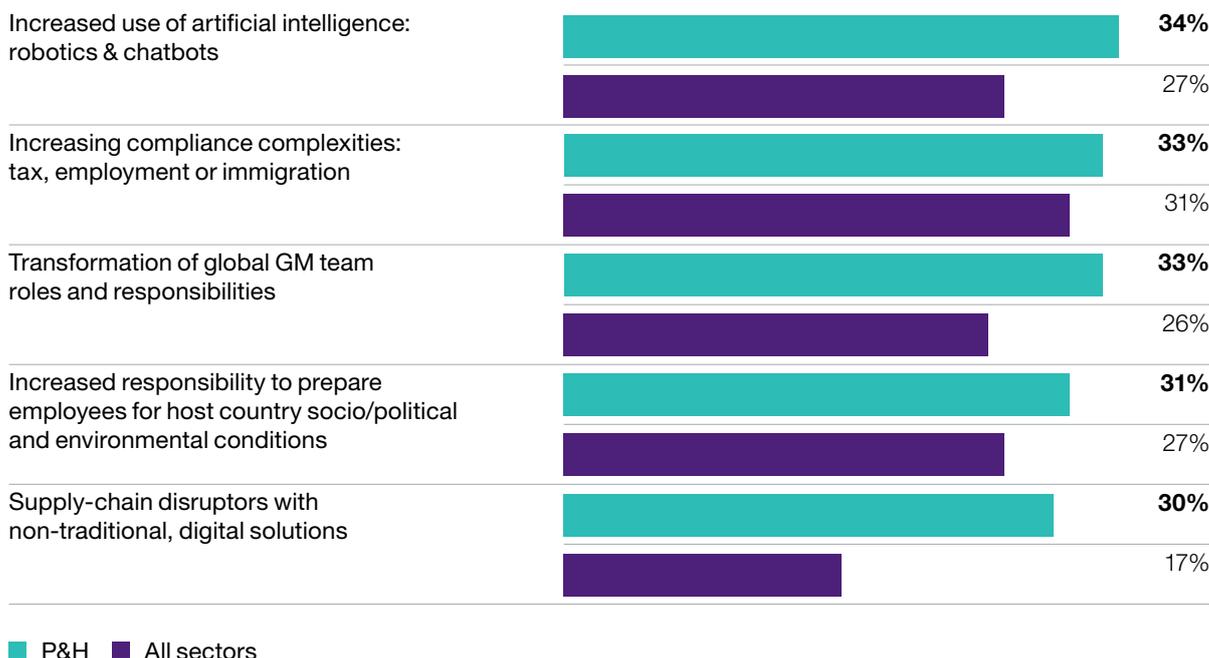
In response to the question:

Do GM professionals have a programme in place to ensure international business travel is compliant?

P&H responses showed that the majority have a programme in place to ensure that international business travel is compliant. However, while in most cases this programme is managed through technology, it tends to be basic methods such as Excel spreadsheets in use. There is a case to be made for more specialised tools to be adopted by GM to improve efficiency and efficacy around compliance for international travel; especially where GM may be increasingly engaged in any form of cross-border movements. This becomes even more compelling when we note that GM professionals, particularly in the P&H sector are expecting increasing compliance complexities to have a considerable impact on their team over the next 24 months.

There is also significant recognition that they will take on increased responsibility to prepare employees for host country socio/political and environmental conditions as well, as seen in **Fig. 11**.

Fig. 11: GM view of interventions and trends having a significant impact on GM function over the next 24 months—top five



We saw in **Fig 1**. (pg. 4) mobility in the P&H sector is an expectation of structures and roles evolving over the next 24 months. This will not happen in isolation and is likely to include an assessment of the increasingly significant impact of specialist technology underpinning GM management. Equally, GM teams in the P&H sector report their expectation that supply chains are likely to be disrupted by non-traditional, digital solutions. As we suggest in our GMS 2020/21—all of these factors need to be considered collectively and not in isolation, to ensure a holistic approach enables alignment between purpose, team roles, systems, policies, processes, and analytics. All have to function explicitly and in an integrated way, whether managed internally by a GM team or co-sourced with an external specialist partner(s).

REFLECTIONS

The P&H industry presents a progressive landscape for the mobility function to truly transform its identity and agenda. Albeit challenging, the COVID-19 pandemic has accelerated the projected global growth for P&H services, thereby increasing demand for a diverse spectrum of mobility scenarios within the context of a complex external socio, political and economic environment.

Our survey data supports the broader industry thought leadership that three top trends will be imperative to this industry's success in navigating the pandemic and achieving longer term sustainability and success. Mobility's integration within the broader business and HR objectives will be a crucial driving force.



Transformation and role of technology

Digital innovation within the P&H industry is receiving high levels of investment as the sector evolves at considerable speed, yet our survey data indicates that this is not the experience of mobility functions operating within this space. There is a lower level of automation occurring in mobility departments within the P&H sector than their peers in other industries. Mobility professionals within P&H must challenge this trend by developing a business case for change, highlighting the ROI and positive impact that technology and AI can play within the mobility and HR programmes. The key strategic argument could be the significant impact digital innovation and data analytics could play with tackling the talent and diversity objectives outlined above.



Talent

Mobility must establish a symbiotic relationship with talent whereby talent can be swiftly and competently mobilised to meet the requirements of the P&H industry. Strategic workforce planning alongside proactive compliance management will be vital to ensuring that talent deficits can be pre-empted and potential obstacles navigated e.g. protectionist immigration systems, tougher tax systems or risky locations.



Diversity

Integrating ED&I (Equality, Diversity & Inclusion) within all facets of the P&H mobility programme is also a *must have* reflecting on the data from the survey and broader industry trends. P&H is delivering better ED&I performance than other industries. Yet, it is cited as an urgent priority within the sector to both future proof the workforce and reflect their diverse client base. Mobility professionals operating in the P&H space are fundamental stakeholders in driving this agenda forward, both from an operational and policy drafting perspective. Mobility must perform a dual role of enabler and promoter striving to meet and exceed their companies' ED&I targets.

If mobility functions directly target these three strategic priorities, they will maximise their chances of securing a central seat at the table within their organisation and be fundamental to the future evolution and ultimate transformation of the P&H sector.

Industry insights

Our global talent mobility team created a laser focused strategic advisory team before the pandemic. We were in place to develop strategies to leverage talent mobility to solve business problems regionally and at a business level.

The insights provided through data analytics have gained worldwide focus with our HR stakeholders. We have a quarterly talent mobility scorecard where we measure speed, quality and value of the talent mobility offerings. The analytics combine the work of our internal team as well as our external partners in our talent mobility ecosystem.

Talent Mobility must continue to transform to accelerate business and talent strategies, while taking into account increasing global complexities.

Mobility advisory leader for a health care company

Transformation and the role of technology

In order for P&H mobility functions to succeed in challenging this trend, functions must seek opportunities to influence and impact the organisational culture/mindset on the critical roles that technology and AI can provide within the mobility space.

Talent mobility

In the context of the global pandemic, the talent team have played a pivotal role within the organisation to maintain business continuity, thus ensuring the right talent is available to service client/business needs. However, compliance challenges have heightened, generating an urgent need to foster more collaborative partnerships between mobility and talent teams in order to mitigate compliance risk. Mobility must provide consistent training and education whilst talent should share their expectations around how mobility can best provide support and expertise.

Diversity integrating ED&I

GM professionals should play a critical role in proactively ensuring that ED&I is transparent and consistent in their Global Mobility programmes. This includes reacting swiftly to changes in the evolving socioeconomic landscape in this ever changing world and working hard to ensure that their organisational brand is well represented.

Tosin Adenrele, Manager, Global Mobility, Compensation and Benefits EMEA

The process

We surveyed **838 professionals** responsible for Global Mobility programmes across **45 countries**. In addition, **55 Business Leaders** were surveyed, spanning the UK, the US, France, Singapore and Hong Kong.

Survey respondents represent organisations that in total employ:

5.1m	At least 5.1 million staff globally.
24,578	At least 24,578 full-time and part-time Global Mobility professionals.
556,287	Respondents are globally managing at least 556,287 internationally mobile assignees.

Global Mobility professionals responses by...

Headquarter location

Europe	56%
Asia	21%
North America	20%
Africa	2%
South America	1%
Middle East	0%
Australia/New Zealand	0%

Respondent location

Europe	52%
Asia	30%
North America	15%
Africa	1%
Middle East	1%
South America	0%
Australia/New Zealand	0%

Industry sector

Financial	13%
Technology and Communications	11%
Pharmaceuticals and Health	10%
Manufacturing	8%
Engineering	7%
Construction	7%
Professional Services	5%
Consumer Products (FMCG)	4%
Retail	4%
Transport and Logistics	3%
Automotive	3%
Utilities and Energy	3%
Others	3%

1. Deloitte Insights—2021 Global Healthcare Outlook, pages. 26-32.
2. GMS 2020/21, REPURPOSE: Challenging change.

Savanta:

Savanta provides the intelligence that underpins better decision making. With five global offices and 280 staff, they bring the benefits of scale. But with Savanta, it's personal. Their specialist practices with their deep expertise and nimble teams built around individual clients make the Savanta experience feel more like working with a smaller, boutique agency. Learn more at www.savanta.com.

Global mobility as an industry is not in its final stages, it is simply transforming.

Transforming lives, careers, the roles within Global Mobility, including the creation of new roles such as data and systems analysts. Data will increasingly play a critical role in the value that Global Mobility teams deliver to their organisations.

The Global Mobility function may also fragment to become absorbed into talent, reward or a Global Mobility business partner role, with transactional work re-allocated to an internal shared service team or outsourced to a Global Mobility specialist provider. We survive, we re-purpose and we thrive—possibly in new ways and with a new normal.



Or search “**REPURPOSE**: Challenging change”



We help people to work, live and thrive in new places around the world.

About the authors

John Rason, Group Head of Consulting, Santa Fe Relocation

Recognised as a thought leader and speaker on strategic international HR, talent management and Global Mobility, John has 15 years of global consultancy experience. Having previously held senior HR leadership roles in numerous global businesses across a range of industry sectors, John now works with global organisations to create value and improve the structure of Global Mobility programmes; focusing on aligning strategic objectives with operational delivery. John can be contacted at john.rason@santaferelo.com.

Selina Jones-May, Global HR Leader (Global Mobility, benefits and people projects)

Applying the technical and advisory skills she acquired whilst working as a big four consultant, Selina subsequently moved in-house to lead functions and programmes across a diverse range of industry sectors. Selina is incredibly passionate about leading teams to create and deliver innovative solutions which enable companies to achieve their talent management and business strategic objectives.

About Santa Fe Relocation

Santa Fe Relocation is a Global Mobility company specialising in managing and delivering high-quality relocation services worldwide. Our core competence is providing services that help corporations, their employees and their families to relocate and settle in new places. These services are delivered to a consistently high standard, locally and globally, through our own operations and approved partners. Visit www.santaferelo.com.

Environmental Responsibility As outlined in our Communication on Progress report, we take our environmental responsibility very seriously. We always aim to use printers that are FSC certified. This means that the printer purchases and uses wood, paper, and other forest products produced from well-managed forests and/or recycled materials. If you have received this document electronically, please consider your environmental responsibility before sending to print.