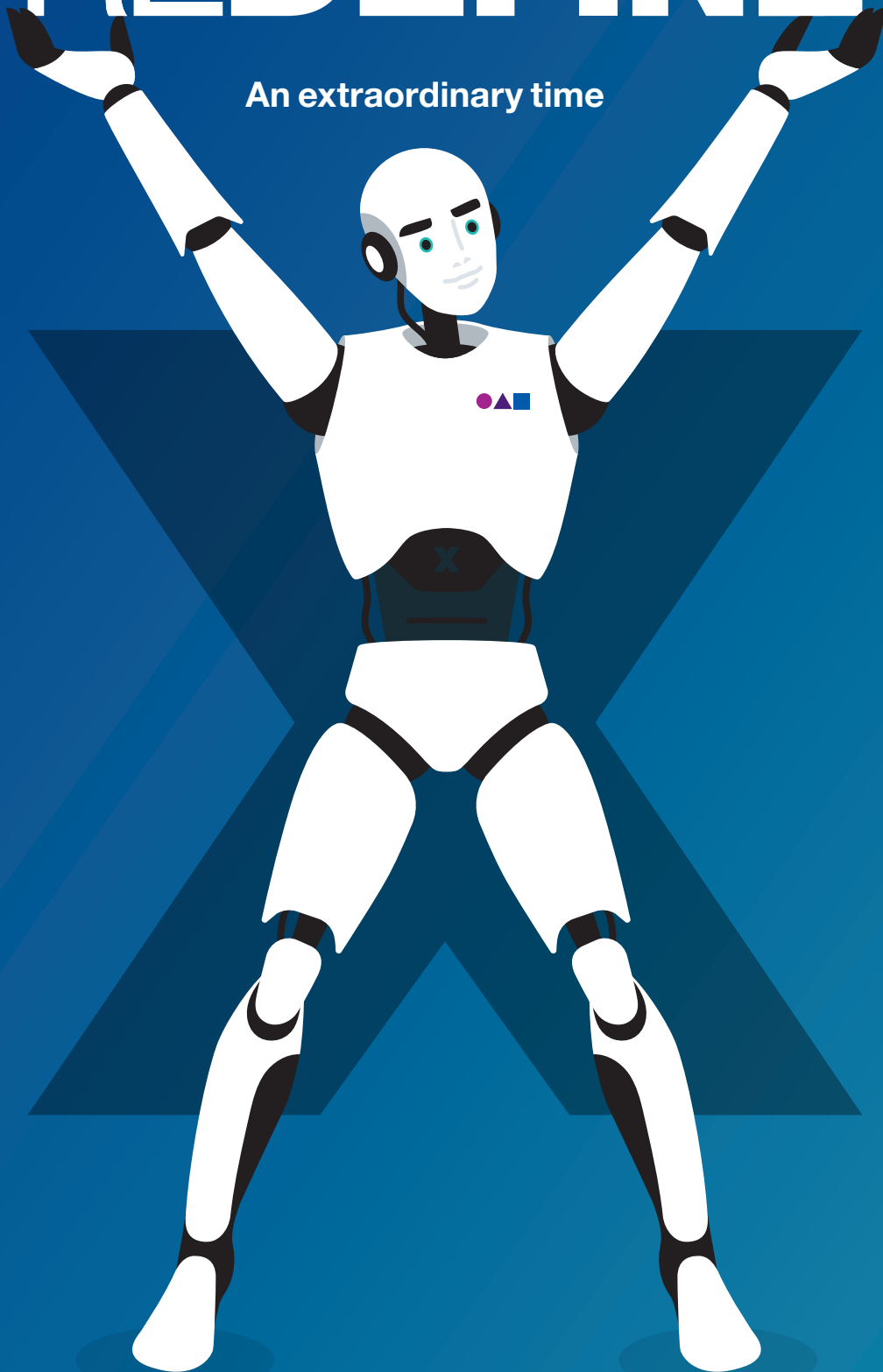


GMS 2021/22

REDEFINE

An extraordinary time



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Change brings possibility.
The question is, are you up for the challenge?

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A complete set of 2021/22 charts
can be found at the back of this report



Attention

Please note some percentage totals exceed 100% because respondents were able to select multiple answers. GM and BL are short for Global Mobility and Business Leaders, respectively.

Complete charts are shown within the main report unless otherwise stated.

Some of the organisations that took part

Agence-France Presse
Akzo Nobel
AXA
Bank of Singapore
Bitzer
BNP Paribas
Bosch
Carrier
Chopard Hong Kong Ltd
Cikautxo
Compak
Distell
DSM Nutritional Products
Engineering Ingegneria Informatica
Equinix
Everis
EvolveBPM
Fagor Ederlan Scoop
Ferrero
Financial Times
Grupo Gestamp
Hatch Africa
IDEMIA
IKEA
International SOS
IUCN
KBR
LEGO
Linxens
Loreal
Mavenir Systems Pvt Ltd
MOL Plc
Mota-Engil
Novo Nordisk
Nutreco
Omron
Philips
Prudential
Prysmian Group
PTC Group
Quantexa
Rand Merchant Bank
RELX
Repsol
Santander
Sasol Ltd
Simoldes plásticos
Societe Generale
TD Williamson
Tapestry
Task Applied Science
Tessenderlo Group
Unilin
Vallourec
Wings Travel Management
World Vision International

REDEFINE

Leader's view

We are delighted to present this 10th edition of our annual multi-award-winning Global Mobility Survey (GMS) report. Between 2011 and 2021, a total of 10,957 Global Mobility (GM) professionals and 348 Business Leaders (BL) participated in the survey.

In this report, we address the critical Global Mobility topics facing organisations operating on a cross-border basis. This year's report is shorter, with a more focused analysis of the key findings. We provide the complete set of charts in the appendix for those who prefer a deeper delve into the statistics.

This report provides insights into Global Mobility transformation with an increase in visibility and consultative expectations. We continue to see an evolving talent scene where remote working and virtual or hybrid assignments have increased along with a resurgence of all types of international work arrangements. It is important to note that cross-border business travel is still under close control and scrutiny at executive levels. Lastly, we examine the increased complexity of risk, compliance and duty of care. And in many instances, the increased uncertainty, especially at the employee level. We see duty of care transitioning into an organisational priority.

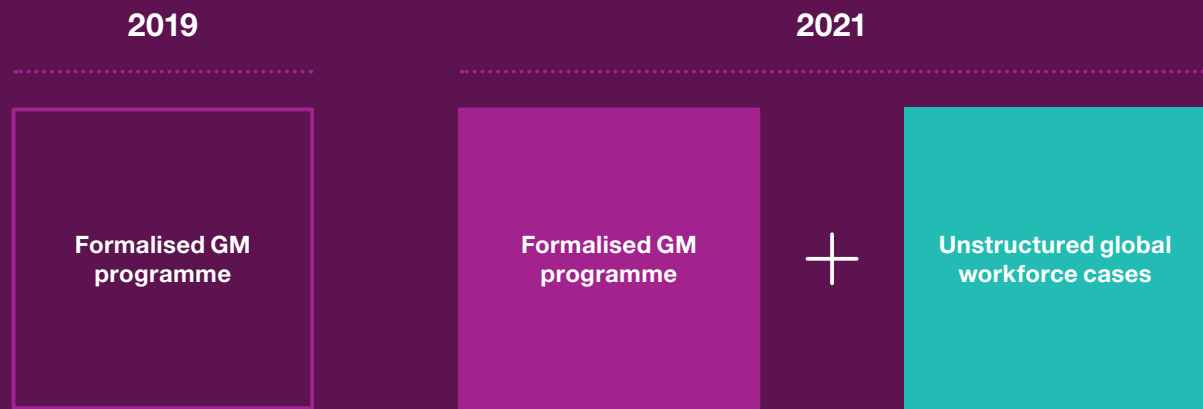
The pandemic has not yet elapsed and may indeed permanently alter how we operate commercially and socially. We hear the words sustainability, flexibility and agility daily. The challenge is turning them into reality. There is no such a thing as post-COVID-19, this is the new normal and we need to think about long-term contingencies.

We hope that you find the report valuable and that it will support the creation of your new realities in these extraordinary times. We would be delighted to explore these themes and benchmark these data points against your organisation.

Yann Blandy
Chief Executive Officer
Santa Fe Relocation

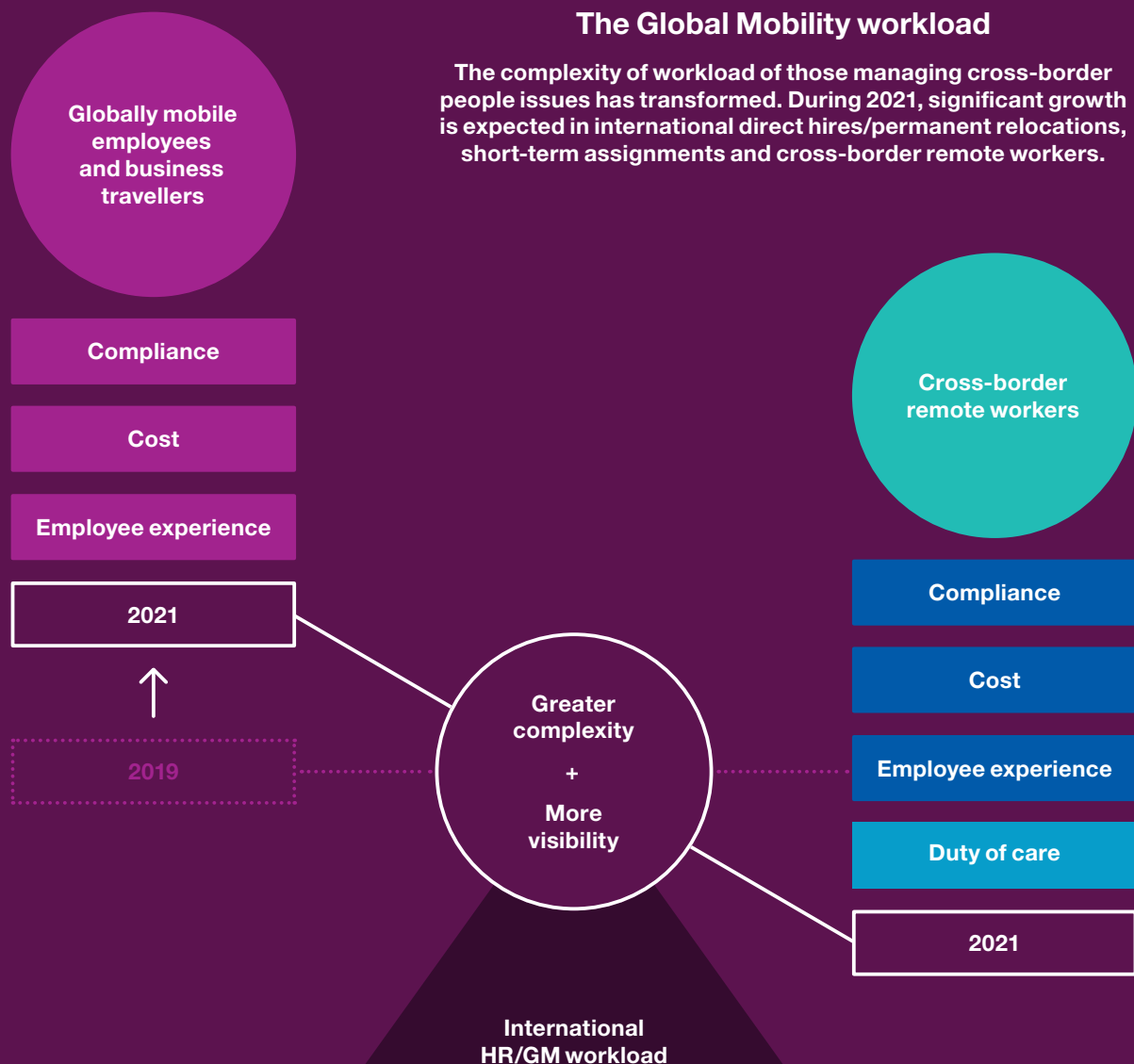


Transformation



The Global Mobility workload

The complexity of workload of those managing cross-border people issues has transformed. During 2021, significant growth is expected in international direct hires/permanent relocations, short-term assignments and cross-border remote workers.

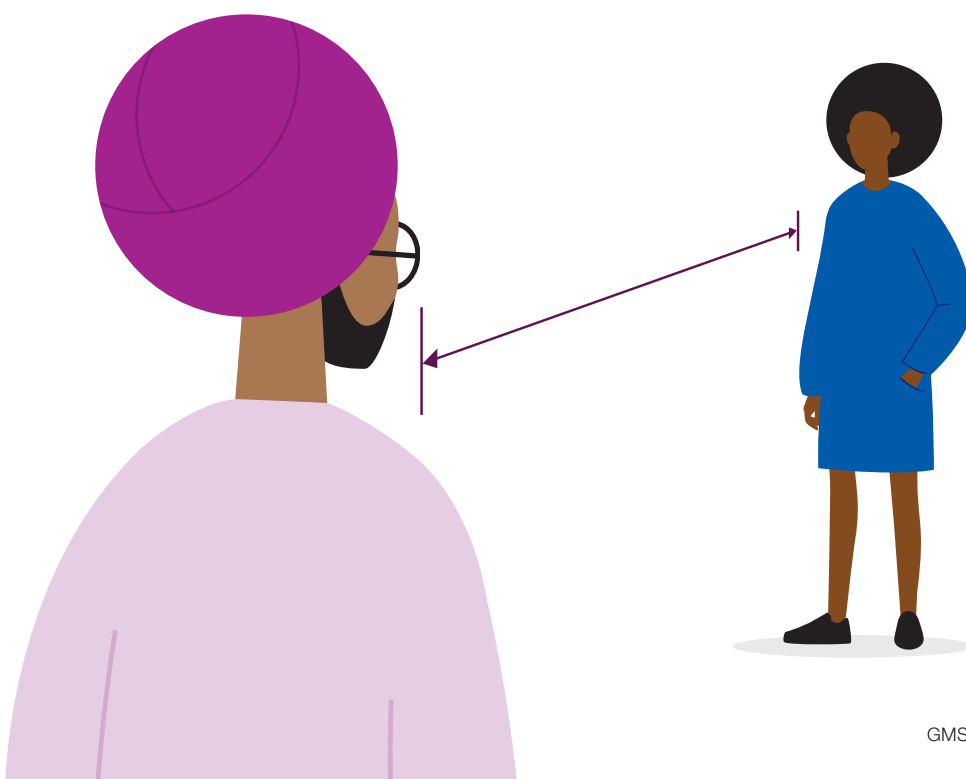


Introduction

The pandemic has generated significant change and challenges within global organisations, particularly for the human resources (HR) and GM professionals. Their increased visibility with internal leadership and stakeholders has required wider engagement, focusing on the formal GM programme and the wider global workforce, because cross-border remote working and virtual assignments have become a complex additional responsibility.

Summer 2021 witnessed a backlog of international assignments and new, more hybrid work arrangements. Remote or virtual has not replaced traditional physical mobility—it is operating in parallel. GM teams face challenges and opportunities with increased pandemic related complexity and potentially more comprehensive compliance and financial organisational risks associated with remote/virtual arrangements impacting policy, process and technology.

It is expected for GM to assume a more strategic role. Business Leaders are clear in their expectation of a GM partner to guide them in making the right people decisions, better control costs and deliver analytics that map spend (investment), track performance and manage long-term people progression/retention (growth payback). This is an overwhelming workload for even the most experienced of GM professionals. In addition, their scope is expanding to include cross-border remote workers not previously considered as part of a GM programme.



1. How COVID-19 redefines Global Mobility and makes it visible

Reflecting on the impact of the COVID-19 pandemic, 84% of GM professionals expect to see transformation over the next 12 months. **Fig. A3, p41 Appx.** One third say that GM strategic/advisory functions will be absorbed by HR business partners or divided between talent and reward; of this third, almost half will outsource to an external relocation management company.

Given the broader workforce portfolio with domestic workers working cross-border on a remote/virtual basis, GM teams are under significant pressure to redefine their roles and operational service model. Immigration, employment tax, corporate taxation and labour laws are becoming increasingly complex, whether it's the C-suite planning acquisitions, sector leaders assessing new geographies or government mandates to respond to compliance requirements from remote working arrangements.

This leads to a redistribution of operational activities, either to an internal shared services team or outsourced to an external mobility/relocation provider. It may be full outsourcing or a co-sourced model including compensation and relocation elements.

As a direct result of the pandemic, GM teams have become visible to leadership who understand their importance in internationally mobilising employees.

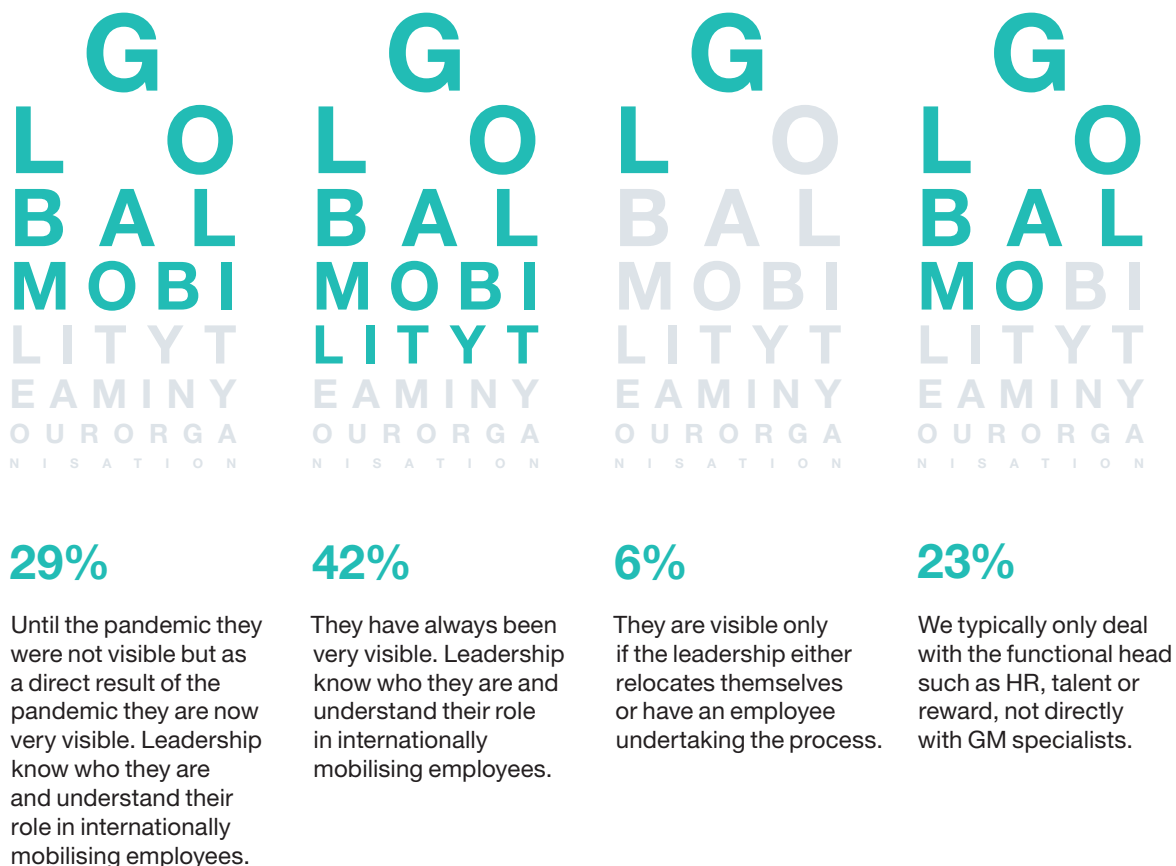
Regardless of whether the broader HR organisation is in the midst of change, the initiative to focus on GM, given its escalated importance, is critical to achieving a competitive advantage for international work arrangements.

We are expanding the corporation internationally, so we can have more executive managers at the host location in the role to deliver on goals.

Global Mobility can deliver processes that work more efficiently and effectively than what's given out today.

Business Leaders response to the question below.

Fig. 1: How visible are the Global Mobility (GM) team in your organisation? (BL)



2. Strategic workforce planning

In 2020, strategic workforce planning ranked ninth and in 2021, it elevated to the fourth most time-consuming activity. In parallel, advisory services is the activity that takes up most of GM professionals' time.

Fig. A4, p42-43 Appx. This suggests that GM professionals have a significant strategic and advisory role.

Overall, these findings highlight a shared focus by GM professionals and Business Leaders to drive organisational growth by supporting and enabling the acquisition and development of the best talent. Noting that 58% of Business Leaders had little or no visibility of GM teams until the pandemic, the focus on talent screening and selection suggests an assumption that GM professionals already fulfilled an HR Business Partner function. From the mid-1990s, HR structures evolved and more segmentation was introduced, seeing the role of GM become technically and operationally oriented. This now seems to be going full circle as GM professionals are expected to become GM HR Business Partners.

Equally, Business Leaders are expecting their GM teams to ensure that cost-effective programme management is delivered, factoring in the new hybrid and remote/virtual dimensions. The necessity for compliance controls will become stronger and GM teams need clarity on what they require help with, to ensure precise scope and predictable fees.

Global Mobility need to concentrate on helping us finding the best possible candidates to work in the best possible conditions.

By doing profiling and building dashboards to highlight key business drivers.

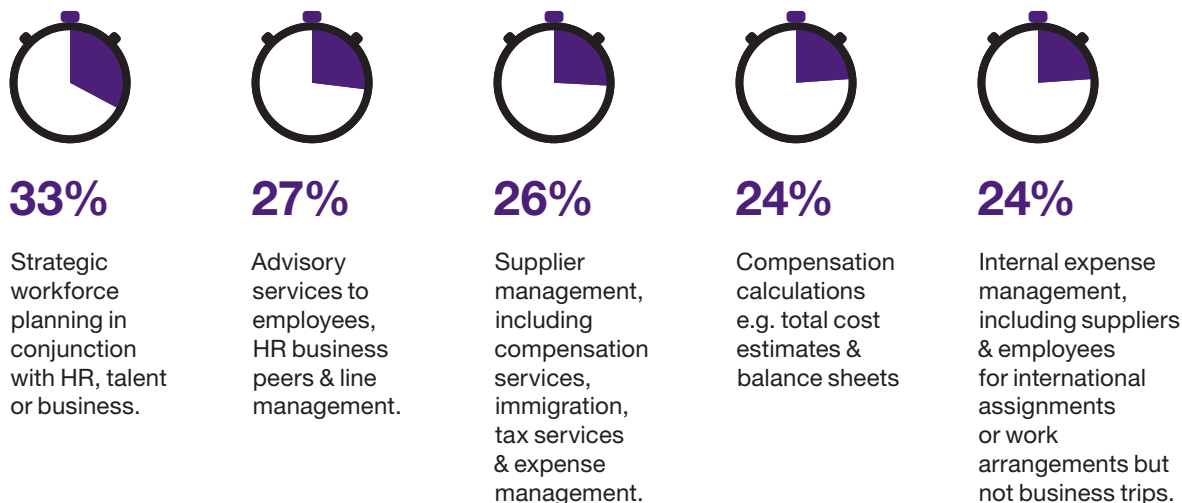
Business Leaders response to question: What financial, people or analytics activities or outputs could GM deliver to create more value to the business? **Fig. A5, p43 Appx.**

Fig. 2: Which five of these activities you should be spending most of your time on? (BL vs GM)
Fig. A4, p42-43 Appx.

Business Leaders



Global Mobility professionals



3. Building a business case for international assignments

Almost three-quarters of Business Leaders say that their company does not have a formalised business investment plan process to authorise international assignments. There is a small increase in those who do, from 22% in 2020 to 27% in 2021. **Fig. A5, p43 Appx.** Of those who have a formalised business case, the most popular way of evaluating the immediate post-assignment return on investment (ROI) is through the achievement of employee talent objectives.

This highlights an opportunity for GM teams to educate and influence Business Leaders to adopt a more thoughtful approach to talent planning processes. GM has traditionally implemented international workforce arrangements once a corporate decision has been made. Embedding and challenging HR and Business Leaders to formalise their investment using a structured business case or people investment plan will drive clarity over the purpose, desired outcomes and the right international work arrangements, whilst allowing full cost visibility and providing increased objectivity over the choice of preferred candidate.

Strategic workforce planning should be the continuous assessment of the achievement of objectives and financial cost tracking. Having the ability to deliver analytics such as retention, cost of leavers post assignments, alignment of performance and talent assessments will enable GM teams to achieve the desired expectation of a more strategic talent advisory role. For example, if GM could illustrate that 25% of their international assignees leave within two years of returning and the combined cost of this attrition was US\$19 million, this is likely to gain leadership attention.

Fig. 3: How do you evaluate the immediate post assignment return on investment from internationally mobile employees on formalised assignments or secondments? (BL) Fig. A5, p43 Appx.



We have digitalised and outsourced transactional pieces and are focusing more and more on being mobility expert consultants.

Soenke Schiricke, Head of Corporate International Mobility, Continental.

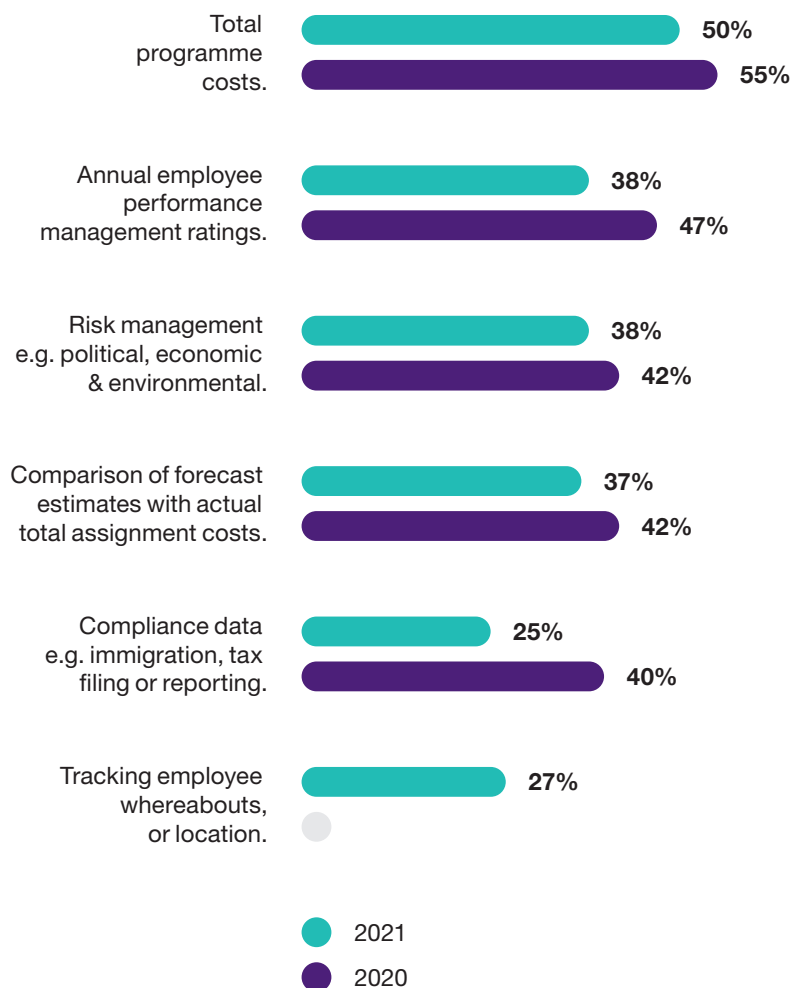
4. Opportunity for better data

Overall, Business Leaders report a reduction in data analytics since 2020 which may be attributable to the additional pressures created by the pandemic. Policy exception reporting conversely increased, possibly associated with out-of-scope policy requests arising from displacement due to national lockdowns or employee choice to work in a third country. Tracking employees is a top priority. On a simple average, only a third of key data sets (cost, performance and talent) appears to be provided to the Business Leaders.

There is an opportunity to improve the alignment of how these data analytics drive value to real business outcomes with stronger engagement of key stakeholders in HR/Talent and Business Leaders. The information should be made readily available, albeit from different sources, which is why digital innovation and enhanced connectivity between the internal Human Resource Information System (HRIS) and the external supply chain is critical as part of the new GM strategic and advisory role. Undoubtedly, some of these data sets will be collated in different parts of the organisation; however, it would be highly beneficial to develop one centralised dashboard as a dynamic component of operational and talent decision-making.

Leveraging meaningful analytics will become crucially important as organisations seek new talent to fulfil people imperatives (such as diversity and inclusion), enter new locations and manage remote cross-border working combined with physical relocation options.

Fig. 4: What data is currently provided to you by your Global Mobility or HR team? (BL) Fig. A6, p44 Appx.



The three key priorities are efficiency, compliance and cost.

Olga Kravchenko,
Group HR COO, AXA.

Overall organisational pressure focus on three areas; reduce cost (efficiencies); quality and compliance and continue digitalisation.

Soenke Schiricke, Head of Corporate
International Mobility, Continental.

5. A growing trend to invest in technology

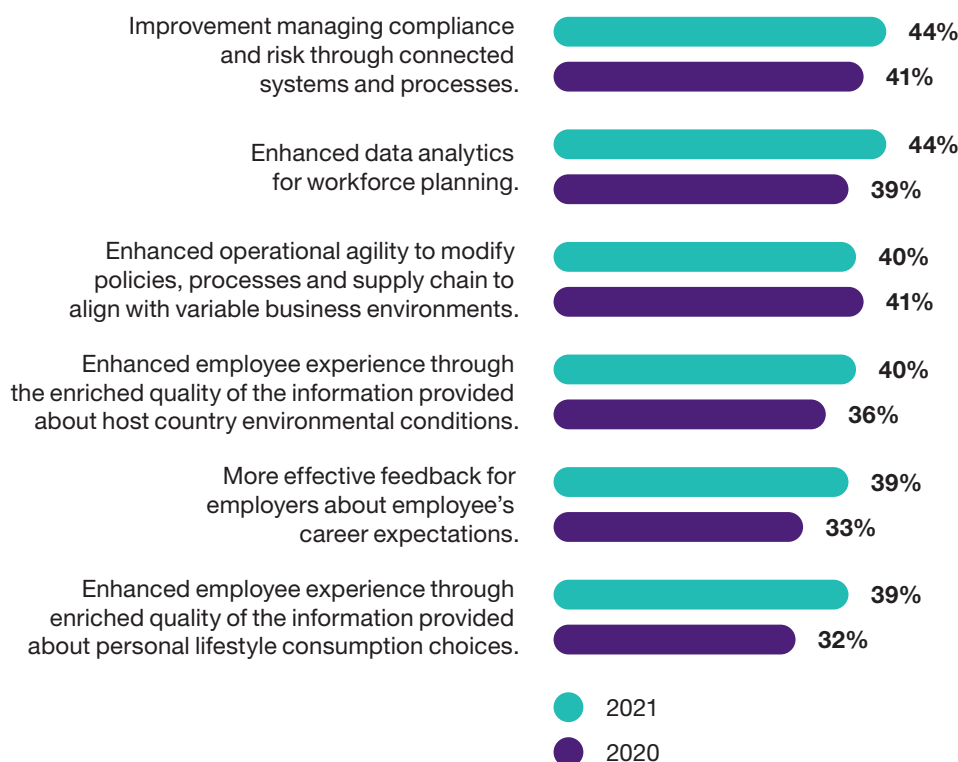
Three-quarters of GM teams are planning to invest in new technology in the next 24 months.

Fig. A7, p45 Appx. In parallel, awareness of digital innovation has improved in most areas since 2020.

On the organisational side, the ability to mitigate and improve compliance and risk management through connected systems and processes is a consistent priority for many GM leaders; enhanced data analytics for workforce planning is imperative. A key aspiration for GM teams is to deliver more cost-effective value for their programmes which acknowledges the need for an integrated approach to developing policies, workflows, better communication and data flows with the external supply chain. While GDPR has been in force since 2018, it remains a significant consideration when requiring technology that supports compliance.

On the employee side, there are significant gains to be made in managing employee experience and engagement. Differentiation in attracting international hires, who may be considering their options on several roles in different locations, becomes critical. On an ongoing basis, it is also seen as a positive enabler for employees' career expectations to become more transparent with their employer. Purchasing technology through capital expenditure with ongoing licence and operational costs versus outsourcing, including in operational fees, is a fundamental consideration. A full cost-benefit analysis must be undertaken to identify the best solution.

Fig. 5: Specifically looking at digital innovation, where do you see it making the biggest impact on your business, in relation to the Global Mobility function? (GM) Fig. A8, p45 Appx.



Three-quarters of GM teams are planning to invest in new technology in the next 24 months



Conclusion

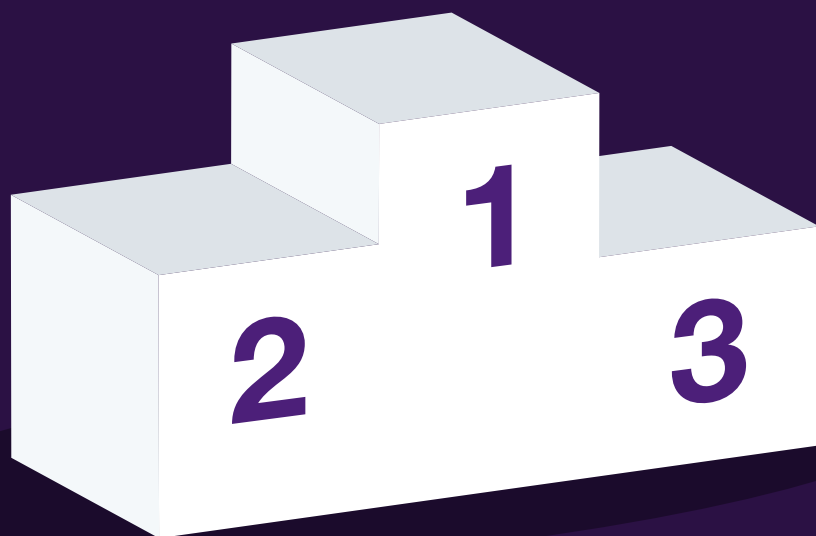
GM teams have raised their profile with leadership and the broader workforce, mainly due to the pandemic, which forced a significant rethink on international working arrangements—virtual in balance with physical cross-border presence.

The uncertainty and complexity associated with monitoring daily changes to country lockdown status have placed an almost untenable drain on resources. So too has cross-border remote working and virtual assignments. Leadership have engaged GM as their source of expertise on policies, frameworks, risk, cost and crisis management. In parallel, GM professionals have their day job of operational programme management. All these additional pressures and often remote working themselves, have created significant challenges to managing work-life balance.

The time is now for GM professionals to have a more advisory focus on workforce planning, location advice, policy and financial controls, which is more in keeping with an HR business partner or business support partner's role. This means that GM professionals will need to rethink what they personally deliver and what could be administered through an internal shared service team or external supply chain.

Digital innovation and connected systems will be a major consideration as organisations increasingly demand data, reporting and analytics from GM on new projects, locations, talent acquisitions and a variety of information. This is no longer a pandemic situation; this is the new normal, with a more hybrid GM function at the centre of business and talent planning.

Talent



Introduction

The evolving nature of global talent mobility has not just occurred since the pandemic commenced. We had referenced in GMS 2019 that CHROs reported a requirement to focus on sourcing new talent and repurposing existing employees in the face of rapidly evolving roles, digitalisation, changing business models and new geographic and product advancements.

2021 has observed the emergence of new working patterns (remote, virtual, domestic and cross-border working) while some sectors have continued with physical working arrangements wherever feasible and legal. As borders have reopened, we have noted increased activity in the deployment of all international work arrangements and to a lesser extent in some countries, international business travel.

The data we present in this report reflects what we believe to be a re-leveling as the backlog of previously approved international assignments unfolds. How this evolves into 2022 hinges on a host of mitigating factors.

Attracting and retaining talent remains a top business priority, with many organisations recognising Equality, Diversity & Inclusion (ED&I) as a board-level imperative. GM teams have been invited to engage on strategic talent and workforce planning and with it, bring innovative ideas to ensure mobility remains attractive and safe for all.

Leading edge GM programmes will balance systems and leverage hard data with a human interface to mobilise the right talent. Connected GM in 2022 and beyond will require joined-up thinking and authenticity.



6. Strategic and business driver insights

Organisations have experienced a period of significant business disruption forcing them to re-envision their strategic direction to remain sustainable and achieve future global growth targets. On a macro level, Business Leaders identify Environmental, Social & Governance (ESG) factors, cost competitiveness, diversification, digitalisation, innovation, as well as talent attraction and retention as the most critical considerations for their future. **Fig. A9, p46 Appx.**

From a micro perspective, almost half of international moving requests were strategically designed to develop future and strategic leaders and just over one quarter were arranged to retain a current employee's employment with the organisation (due to a mobilising partner). The high proportion of accommodative moves is possibly a consequence of organisations seeking to quickly repatriate or remobilise family units during the pandemic, as well as a greater appreciation of dual career families. Only 8% of mobilisation authorisation were motivated by a driver to enhance the diversity or cultural profile of the organisation, likely due to the practical restrictions presented by COVID-19.

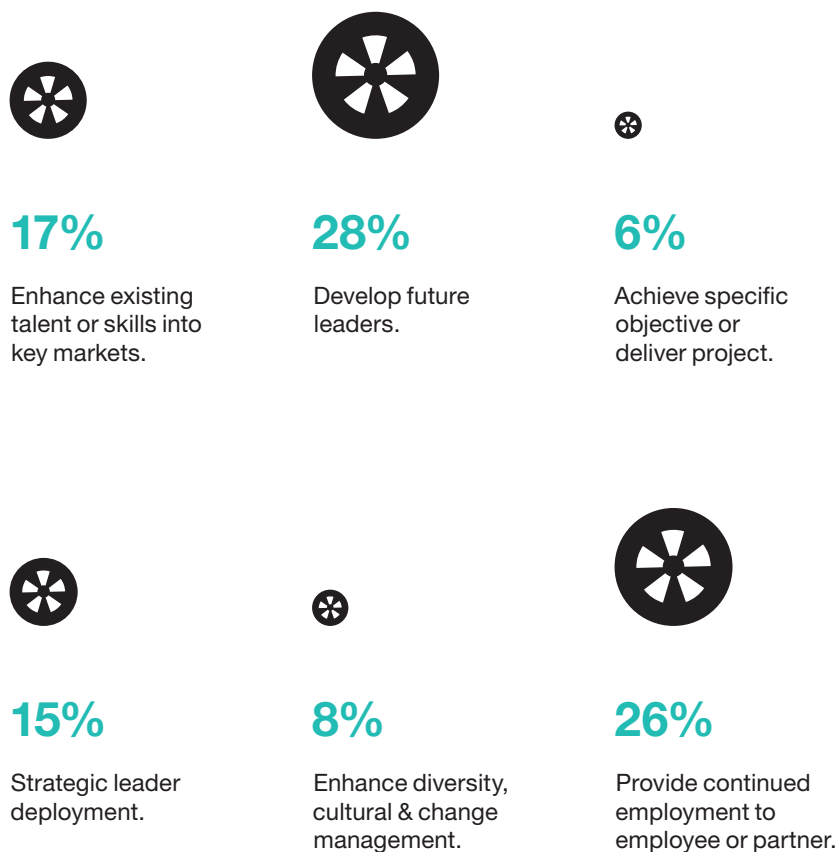
We are moving operations overseas as markets mature and skill levels increase and provide a chance to cut costs.

To have a greater leverage in expanding and creating global services.

Business Leaders response to question: How and why do you anticipate these business/people drivers changing in the next 12-24 months?

By focusing on their role as value-add trusted advisors, GM professionals will maximise the company's talent ROI and strengthen leadership's sponsorship of the GM function.

Fig. 6: What are the primary business drivers for authorising international assignment or international work arrangements? (BL) Fig. A9, p46 Appx.



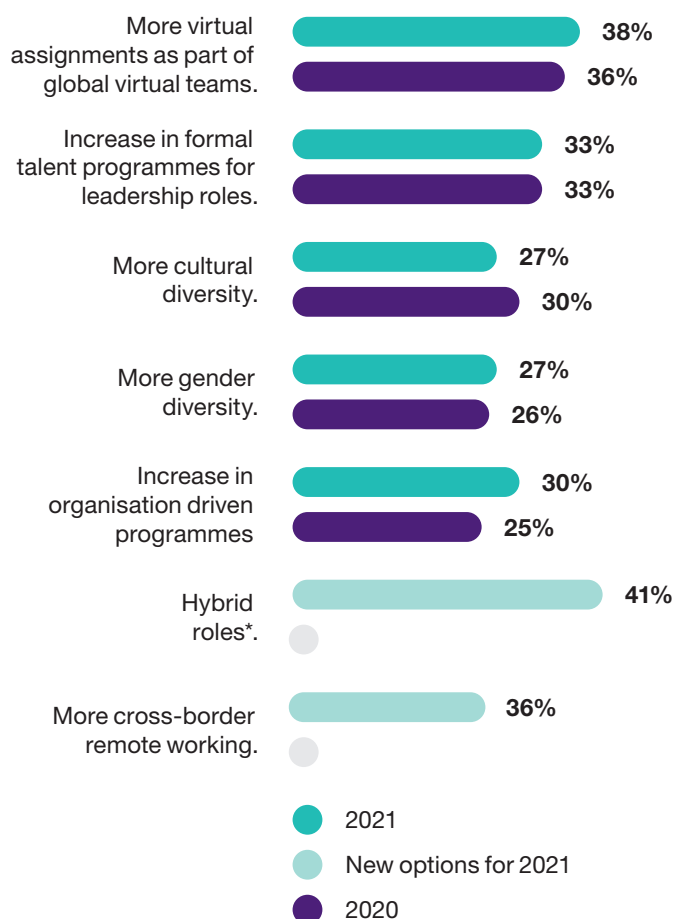
7. Taking the lead on hybrid working

Remote working, virtual assignments and hybrid arrangements are regarded as the biggest changes expected amongst internationally mobile workforces over the next 24 months (GM).

Projecting forward 12 months, GM professionals expect that virtual assignments will significantly alter the structure of the internationally mobile workforce. However, this has changed little since the start of 2020, reminding us that the shift towards virtual assignments caused by the pandemic has been a trend for a reasonably long time now. We are also glimpsing signs of the pendulum shifting towards in-person assignments. The most anticipated change for GM professionals is a move towards hybrid working, with 41% suggesting this will be a significant change over the next 12 months. This suggests that whilst GM teams foresee virtual working remaining prominent going forward, they anticipate these arrangements will blend with more traditional physical relocations. GM teams' expectations of playing a bigger talent role in selection and screening is reflected by an expected increase (30%) of organisation-driven programmes.

Gender diversity is also recognised as a key driver for organisations, albeit at a slower rate of take up than one might expect. Earlier, we noted that 73% of Business Leaders do not see a formal business case for international work arrangements, which is a potential barrier for ED&I and also a reduction in the need for cultural diversity, which are counter-intuitive to the goals often stated in corporate websites.

Fig. 7: What changes do you expect amongst your internationally mobile workforce over the next 12 months? (GM) Fig. A10, p47 Appx.



*Mixture of international business travellers and commuters, short or long-term assignment and virtual working.

8. Understanding the COVID-19 impact on Global Mobility

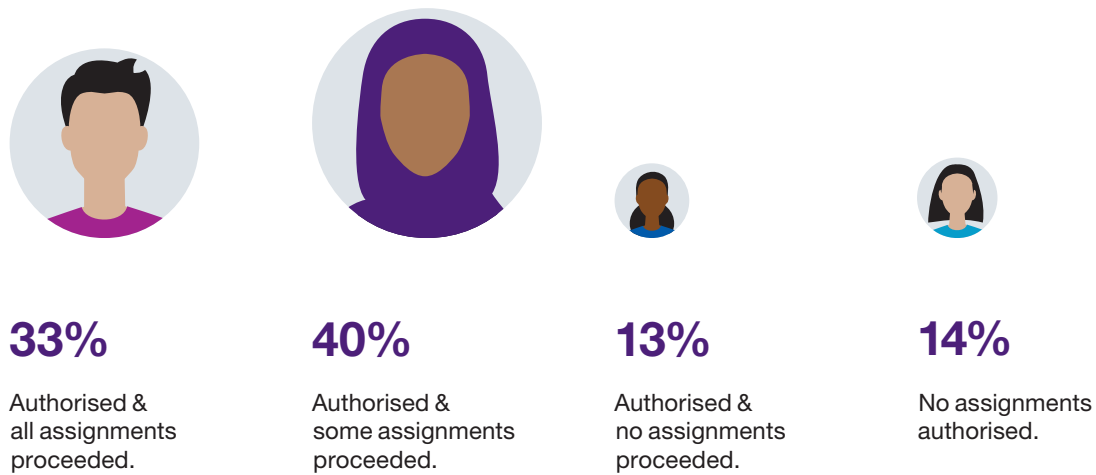
The pandemic did not halt mobility, mobility is thriving in the new normal.

Surprisingly, only between 20% and 30% of assignments did not proceed or get authorised. 70% were proceeding albeit with disruption. Graduate programmes suffered the most reduction in approvals and mobilisations, likely due to the reliance on face-to-face interactions not being possible during the peak of the pandemic. Redesigned programmes are expected to emerge in 2022.

Given that physical relocations were either deferred or stalled due to home/host pandemic status, it is clear there is a pent-up demand driving the return of long-term assignments. The employee experience, with postponements and uncertainty, has become more important to manage. The stress levels are heightened and decisions more challenging, as employees embark on an international move.

While the world has become relatively acclimatised to this new environment of continual changes and preventative restrictions to border access, it is not a unique situation. Pandemics are not a new phenomenon. The new is how organisations and society in general, thrive and function in the new normal. It will be interesting to review the next wave of mobility movement in next year's report.

Fig. 8: Percentage of assignments which are authorised and the extent to which they proceed (GM)



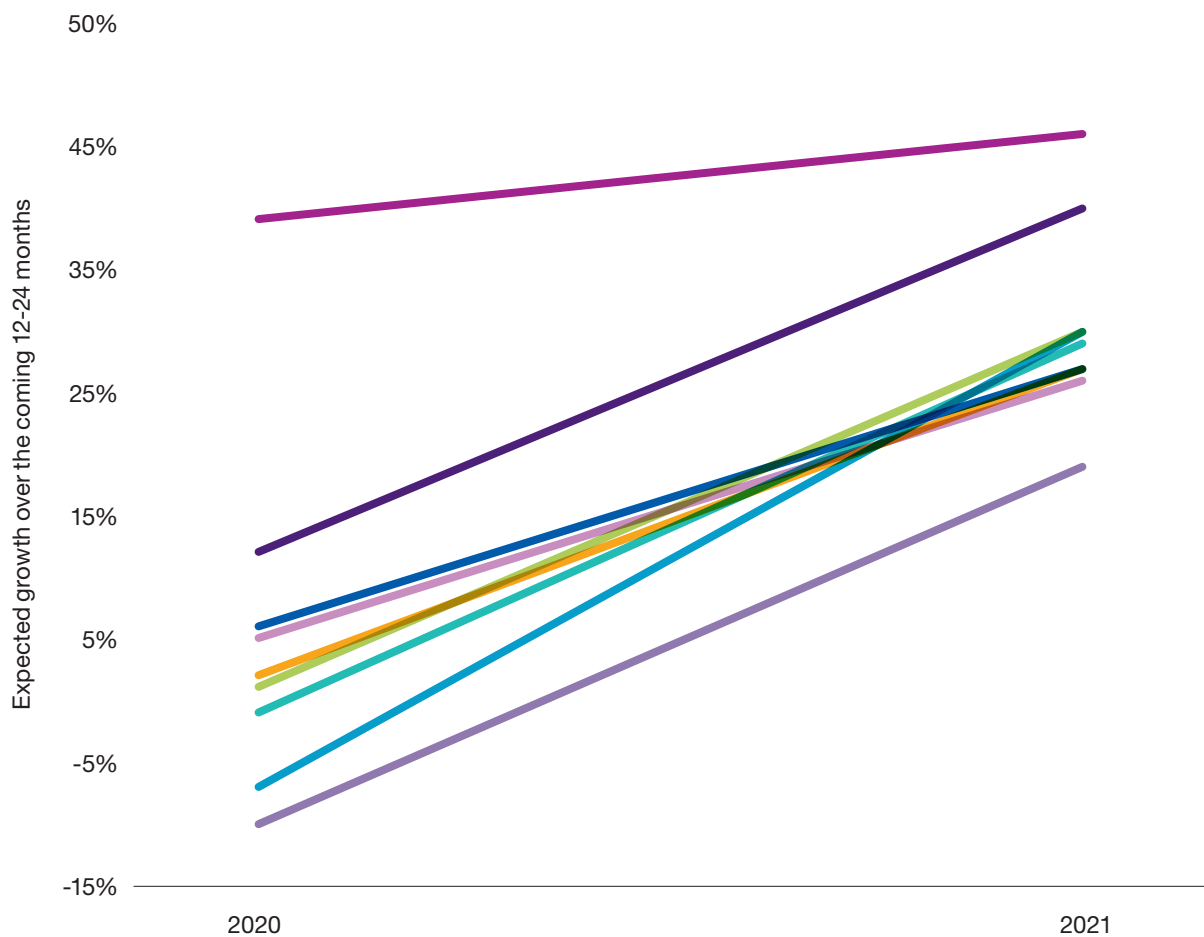
9. Predicted resurgence of international assignments

Mobility remains a fundamental component within most organisations across different sectors, especially for those regulated industries requiring physical presence of the workforce. Remote and virtual arrangements are in parallel, not a substitute for traditional models. Hybrid models are set to become an expedient solution to the uncontrollable external pandemic factors.

Equally, there is no let up on demand for the global talent pool, evidenced by the increase in one-way relocations in 2021 where GM teams are key stakeholders in enabling and selling the moves to prospective employees. Business travel has been subject to greater scrutiny considering that organisations have maintained business as usual on a virtual basis and with the increased risk and duty of care, volumes of business travel in some countries are on a slower trajectory.

As international work arrangements become more fluid with the continued evolution of hybrid arrangements, it will be essential for GM teams to determine their policy framework for governance, compliance and rigidity of policies. Another compelling driver to establishing more rigour in the initial business/people investment case and proactive engagement by GM in the planning process.

Fig. 9: Expected growth of assignment types between 2020 and 2021 (GM) Fig. A12, p49 Appx.



- Remote or virtual arrangement. **+7%**
- Graduate programmes. **+28%**
- One-way international relocations—employee initiated. **+29%**
- Strategic long-term. **+37%**
- Short-term. **+30%**
- One-way international relocations—company initiated. **+21%**
- Developmental long-term. **+25%**
- International commuting. **+21%**
- International business travellers. **+29%**

10. Equality, diversity and inclusion considerations

ED&I is a hotly debated priority across global organisations as they seek to carve out the most competitive future workforce. Interestingly, a marginal improvement in the ratio of female to male assignees going on physical assignments was reported since the previous survey from 32% to 34% female.

Business Leaders, however, paint a concerning picture regarding organisations' outlooks on the level of cultural and gender diversity change they expect to observe in their globally mobile workforce within the next 12 months. In the period between 2019 and 2021, organisations' expectations around diversity metrics dropped across culture (by 9%) and gender (by 4%), indicating a viewpoint that ED&I targets and strategies have not accomplished the desired results relative to their strategic importance.

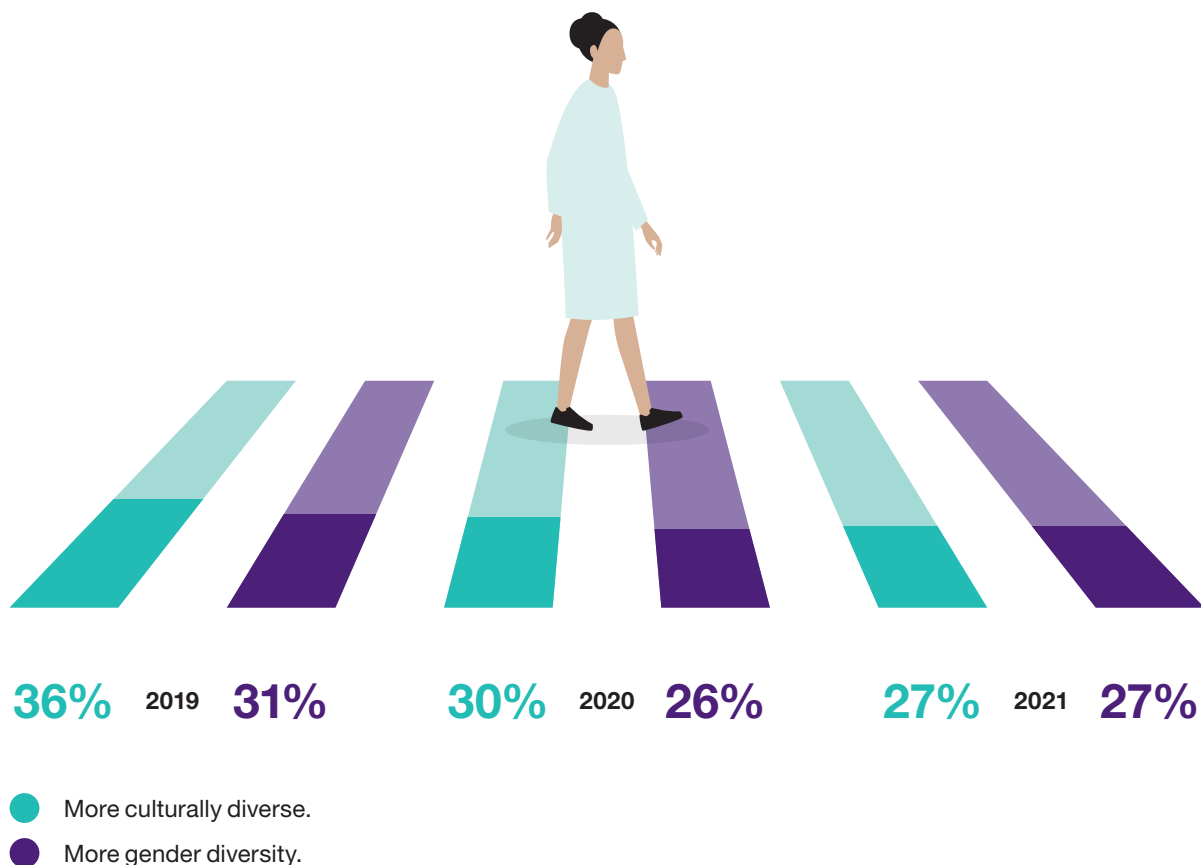
Trends in the business and economic environment occur in many areas. As noted earlier, today's workforce is more diverse than ever, with increasing numbers of minorities and older workers.

Competition has intensified.

Business Leaders response to question: How and why do you anticipate these business/people drivers changing in the next 12-24 months?

Since the pandemic continues to present significant barriers to mobility, it is paramount that ED&I becomes centre stage of future talent management decisions. Failure to act isn't an option in a hugely disrupted and competitive market, especially with the ESG reporting obligations and the potential reputational risk at stake. Mobility should play an instrumental role in driving this change.

Fig. 10: What changes do you expect amongst your international mobile workforce over the next 12 months (GM)



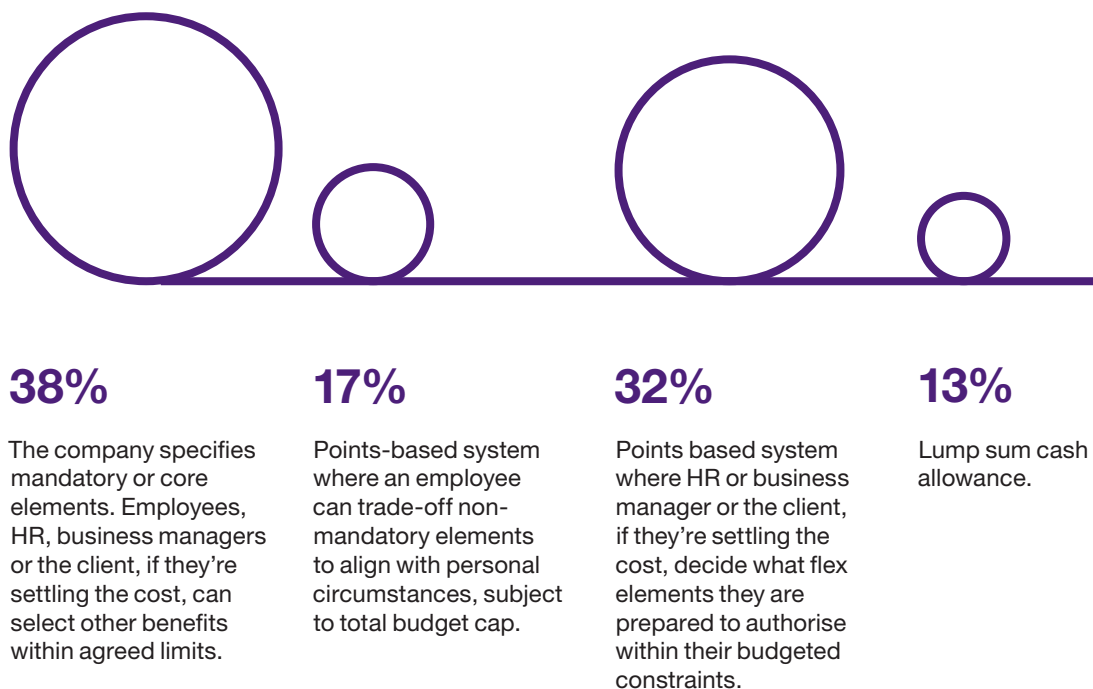
11. Adoption of Core/Flex policies

Core/Flex remains topical with almost half of organisations having already implemented a policy and a further third considering pursuit of that approach within the next six months. Technology is playing a pivotal role with 80% of respondents noting utilisation is important to support rollout and administration. Cost remains the biggest driver for Core/Flex adoption with the organisation seeking to cap budgets whilst also offering employees more flexibility and choice in selecting a package which aligns with their personal circumstances.

44% of organisations state that their Core/Flex policy has improved acceptance of any form of international assignment/work arrangement.

The predominant trend remains for organisations to mandate core package elements whilst extending additional optional benefits to the assignee. The second most common approach involves the implementation of a points-based system, with lump sum cash allowances being less typical. A key challenge remains how to manage exceptions in a way that doesn't dilute employee experience, duty of care and cost benefits. This must be weighed up by organisations in the knowledge that exchanging cash for benefits can often increase tax costs for the employer.

Fig. 11: Core/Flex policy frameworks that have already been implemented (GM) Fig. A14, p50 Appx.



Conclusion

COVID-19 has altered the path of talent management forever.

As organisations navigate every high and low in the pandemic journey, talent management has temporarily morphed into a more reactive activity. Regulatory, legal and financial constraints have inevitably stunted mainstream globalisation and strategic plans, requiring more creative approaches to stabilise business operations in a disrupted world.

Mobility functions have worked tenaciously with the business to support the deployment of talent in unprecedented conditions and tight budgets. Proactive planning, pragmatic advice, comprehensive stakeholder engagement and education and swift execution will remain the winning formula.

Positive reports of organisations successfully mobilising their employees globally despite the significant obstacles they face should be celebrated. Evidence of a predicted resurgence of assignments will be interesting to monitor over the coming year, especially the more traditional assignment package types. Will these be a backlog of historically authorised assignments or an indication of a return to pre-pandemic volumes?



Remote working, virtual assignments and hybrid arrangements have become mainstream features of today's mobility policy suite as an additional talent attraction and retention tool and a necessity to manage talent in the new COVID-19 normal.

Looking ahead, Business Leaders, HR and GM professionals must truly collaborate to elevate the strategic talent mobility priorities of their organisation at board level, agnostic to the constantly unpredictable external factors impacting their operations (COVID-19, cost constraints, future workforce changes and digital disruption). Significant progress in ED&I will also be critical to winning the new war for talent.



Risk



Introduction

The pandemic has propelled risk up the league table of challenging issues impacting business stability and sustainability. Organisations are seeking to rapidly adjust to a new norm of virtual, remote and hybrid working arrangements whilst simultaneously resolving the retrospective compliance complexities created by a displaced workforce. The pressure on GM professionals to proactively manage this increasingly complex workload alongside the strategic priorities of the business is immense.

The role, potential value-add and expectations of external third-party suppliers has never been so critical as GM functions (many of which are currently under-resourced) strive to competently deliver an increasingly diverse range of activities in unprecedented circumstances.

Duty of care considerations for the mobile workforce have also expanded exponentially beyond their traditional routes as the pandemic continues to generate heightened concerns over the health, wellbeing and safety of employees and dependents. Unparalleled crisis management situations, addressed by a reactive approach to the pandemic, have presented corporations with valuable learnings regarding their relative lack of readiness and how imperative it is to proactively plan for future incidents.

Organisations must fully embrace the new norm to effectively navigate pandemic obstacles and their aftermath. High levels of stakeholder engagement and education should remain central to this strategy.

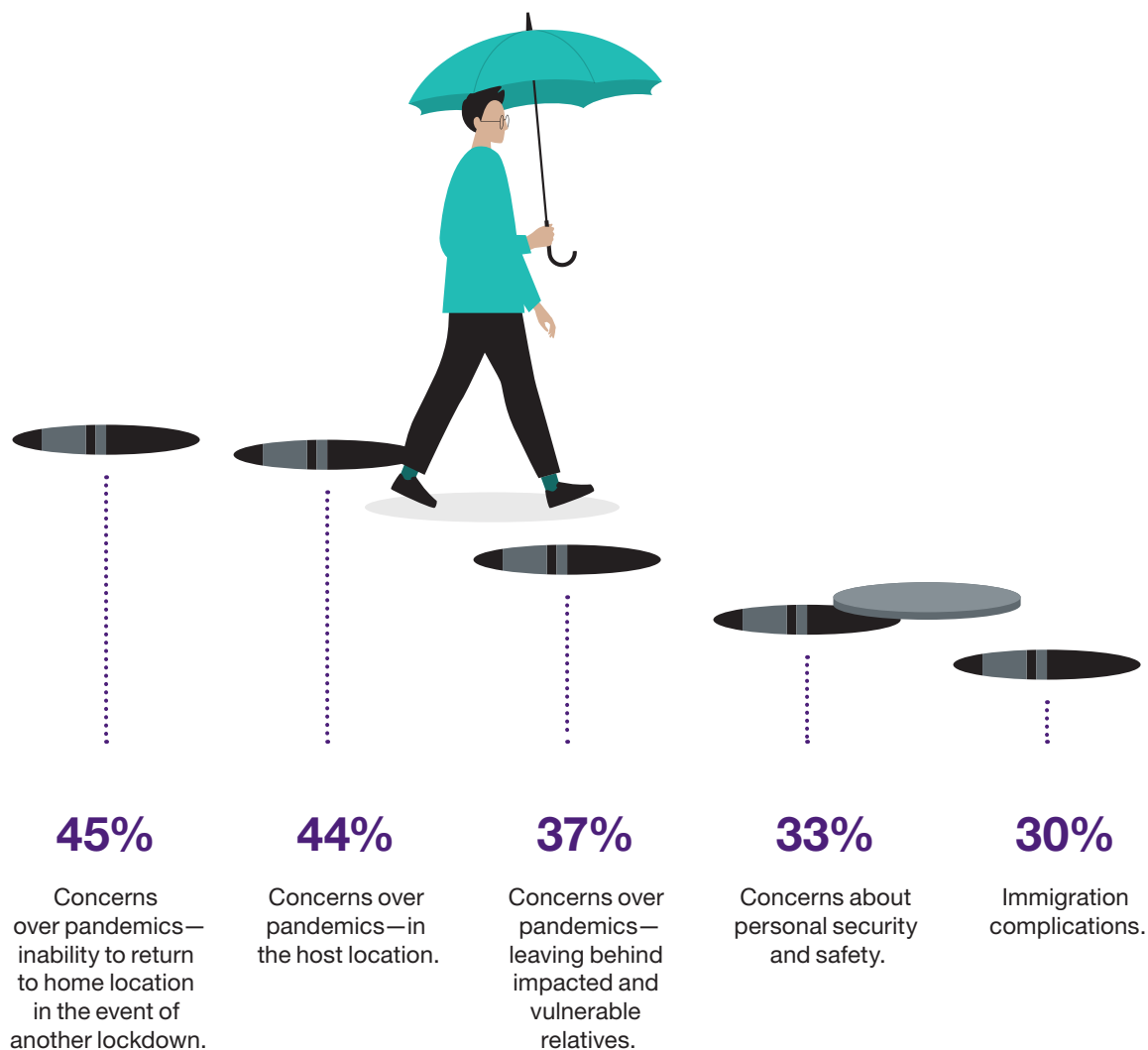
12. A climate of uncertainty

Concerns over the pandemic are regarded as the main challenge to mobilising talent over the next 12 months. Uncertainty around compliance and duty of care implications is cited as the main barrier to organisations mobilising their talent over the next year. This presents a significant risk to the sustainability and globalisation of corporations and an unenviable task for the GM function within the context of cost-cutting and tighter budgets. This uncertainty provides GM leaders with a unique opportunity to review their programmes and implement impactful strategic and operational changes to positively influence business performance.

Popular initiatives could include

1. Benchmark how competitor organisations manage risk. Evaluate the activities which should stay in-house or be outsourced to a third-party supplier for efficiency and capability.
2. Undertake a market review of core risk contracts to ascertain best fit supplier, scope and pricing model.
3. Collaborate with internal stakeholders across different duty of care areas e.g. health & safety, benefits, insurances etc. to complete a robust risk assessment. Road test mock crisis management scenarios to assess level of readiness, implement process and policy improvements to plug gaps.
4. Roll out comprehensive education and communications to stakeholder groups. Promote how mobility and HR are protecting their interests and enhancing the assignment experience.
5. Notify leadership of how costs and risks are being mitigated. Produce compelling business cases for investments required. Promote cost savings generated to demonstrate commerciality of the function.

Fig. 12: What will be the most challenging factors to mobilise talent over the next 12 months? (GM)
Fig. A15, p50-51 Appx.



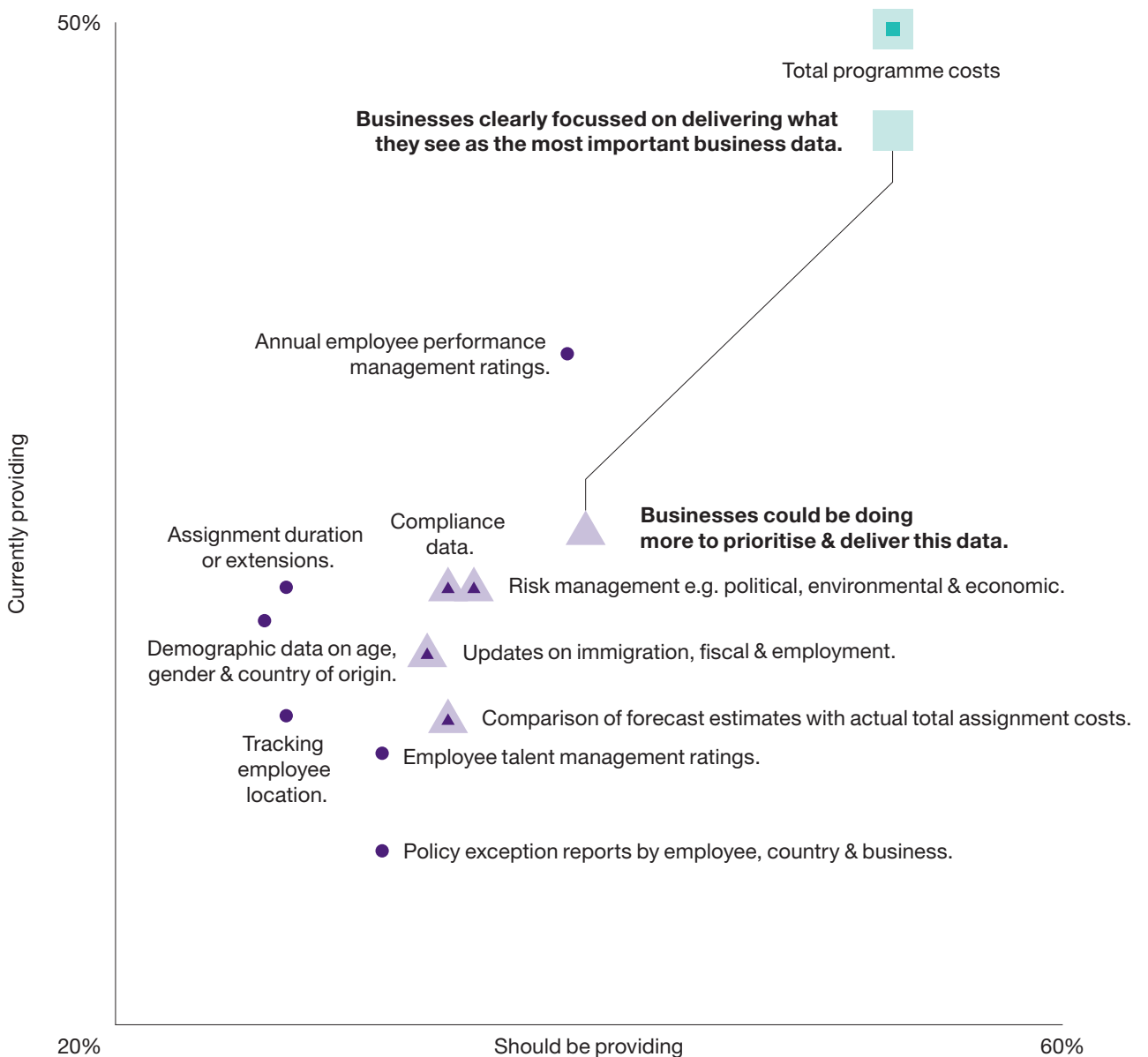
13. Bridging the data gap

Data analytics are predicted as a primary accountability of the future GM professional and an expectation of business leaders to support decision-making. This year's data illustrates several areas where there was a data gap (between what functions are currently versus should be providing to the business). These lie in the areas of compliance, financial forecasts (estimates versus actuals) and costs. Conversely, substantial data reporting was dedicated to assignee and assignment demographics as companies sought to recalibrate after pandemic-related workforce displacement.

It is arguable that the data gap trends are surprising considering the financial constraints some organisations have been operating within. This is most likely explained by the reactive stance mobility teams and their employers found themselves in at the peak of the pandemic.

This continuously evolving pandemic world will burden organisations with compliance and duty of care challenges. Mobility must identify and implement tangible solutions to bridge this data gap. There is no better time for GM functions to reignite their business case to implement assignment management technology or additional modules to better manage their risk and financial reporting. Equally, to mitigate corporate risks and considering the additional focus on ESG reporting, the imperative will be the selection of the best fit external suppliers to provide specialist activities.

Fig. 13: GM teams have an opportunity to enhance data analytics for their leadership stakeholders (GM)



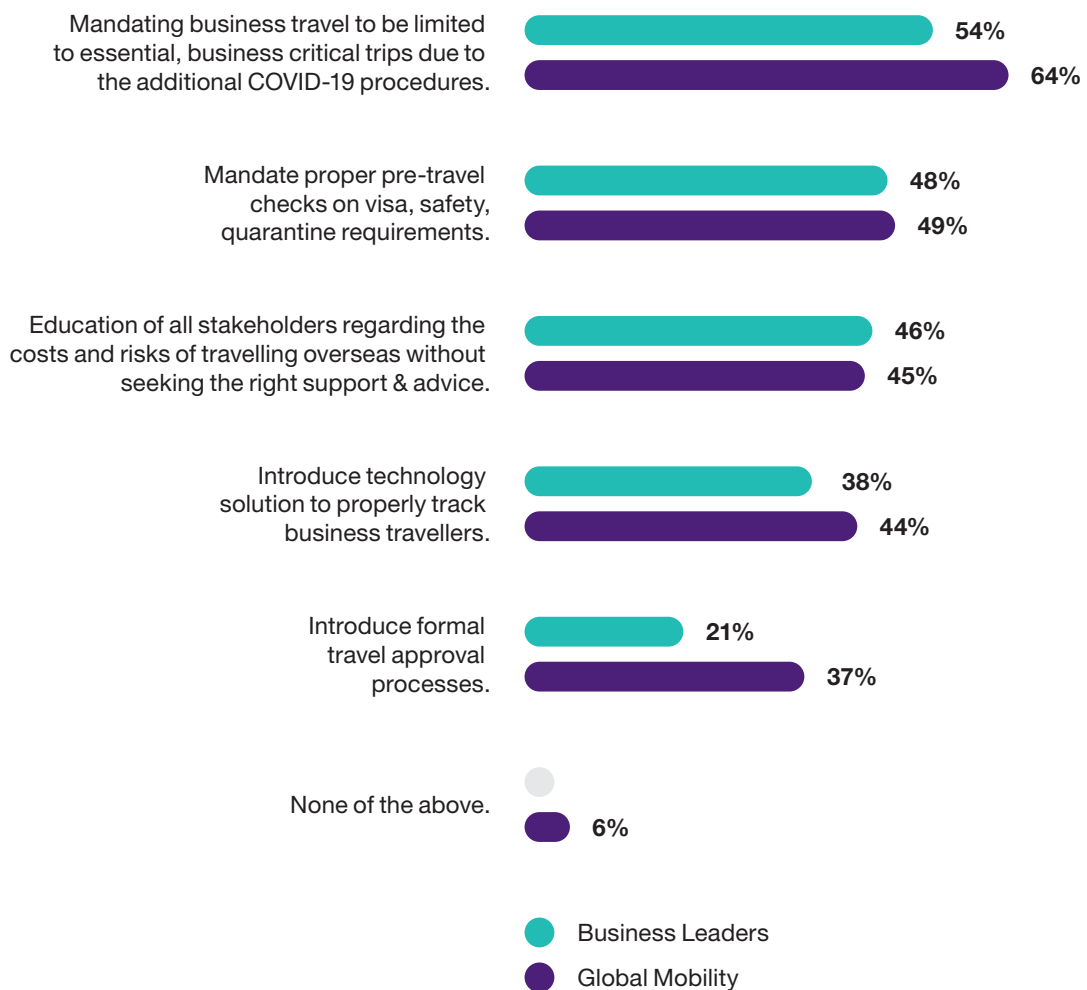
14. Business travel outlook

Business Leaders and GM professionals have a different perspective on the level of anticipated changes and protocols required to the business travel programme because of the pandemic. COVID-19 has suppressed the volume of business travel due to continual variants and changes in government restrictions and rules. Organisations have adopted remote and virtual working, with an expectation that business travel will not return to prior levels for the foreseeable future.

The survey data indicates that GM professionals and Business Leaders have a differing outlook in terms of the extent of changes required to the business travel programme in the post-pandemic era. 54% of Business Leaders surveyed propose mandating business travel to only essential trips, compared with 64% of GM professionals. This 10% gap highlights a more bullish attitude of Business Leaders to recover from the pandemic, or possibly a less detailed awareness of the added complexities business travel presents from a practical compliance and administrative perspective. This latter theory may be substantiated through the business' more pessimistic approach than that of GM to implementing a technology solution or formal approval process for managing business travel in the future.

GM professionals should identify which stakeholders are jointly responsible for business travel. Creating a taskforce, objectives and clear accountabilities for a best fit business travel programme will be a crucial first step in the journey. Reviewing the processes, policies, digital options, suppliers and approval protocols will enable an efficient, compliant and safe process for all involved. This is essential for the safety and security of the workforce and would avoid jeopardising the organisation's external market reputation and ability to resume their global growth.

Fig. 14: Business Leaders and GM have a different perspective on the level of anticipated changes and protocols required to the business travel programme as a result of the pandemic (BL vs GM)



15. Crisis management learnings

COVID-19 produced crisis management scenarios on a scale which most GM professionals had never previously experienced. With only 9% of GM respondents reporting that they have well-defined processes and tracking in place, the remainder identified that multiple process improvements were necessary. Considering that COVID-19 is a feature of current times, it is essential that stakeholders unite to safeguard the safety and wellbeing of their workforce. Proactive planning will both avert further disruption to business operations and future-proof achievement of the strategic financial commitments made to the market and investors.

GM functions should instigate a crisis management strategy project with internal stakeholders if they identify that gaps in current protocols still exist. Stress testing current procedures, third-party vendor services and communication channels should be incorporated into this review. Strong engagement, communication and education will guarantee that documented plans translate into a swiftly executed response in the event of a live case.

Additionally, key will be keeping abreast of changing regulations via supply chain partners and networks with pivotal external parties to remain current on laws, socio, political and economic conditions to successfully pre-empt and plan around such difficulties.

Only 9% of organisations reported that they have well-defined processes and tracking in place

Fig. 15: What do you see as crisis management learnings in relation to the Global Mobility programmer based on your experience in 2020? (GM)



16. Duty of care in the pandemic era

Two thirds of the top scoring responses attribute duty of care considerations (healthcare, safety, security and quality of life) as the main barrier to achieving their GM objectives over the next 24 months.

The crisis management floodgates of the past 18 months have ushered in a broader duty of care obligation on GM functions as organisations endeavour to mobilise both new and postponed assignments. It is noteworthy that one of the World Economic Forum's published six 'Stakeholder Principles for the COVID era' is to keep employees safe. Organisations must rigorously interrogate their global workforce's potential exposure across a diverse spectrum of risk areas and territories to ensure that their people's wellbeing and safety is at the forefront of their talent strategy. The globally mobile employee's experience must include enhanced quality of engagement, communications and tools to support them throughout the journey, including a renewed focus on mental and financial health aspects.

Implementing a GM risk register with periodic review points is an advisable starting point for those functions reviewing their duty of care protocols. Already renowned for their capability in identifying innovative solutions to complex, technical issues, GM is ideally placed to take the lead in advising the business on duty of care matters. This value-add role will be fundamental to both the business' talent management and global growth strategies.

Fig. 16: Uncertainty, duty of care and compliance concerns are reported as the main challenges to achieving Global Mobility objectives over the next 24 months (GM)



42%

Uncertainties due to impact of COVID-19.



37%

Barriers to mobility for some employees as a result of COVID-19.



26%

Safety/security issues in host locations.



26%

New types of mobility—employee initiated e.g. virtual assignments.



26%

Quality of life including environmental health and medical risks.



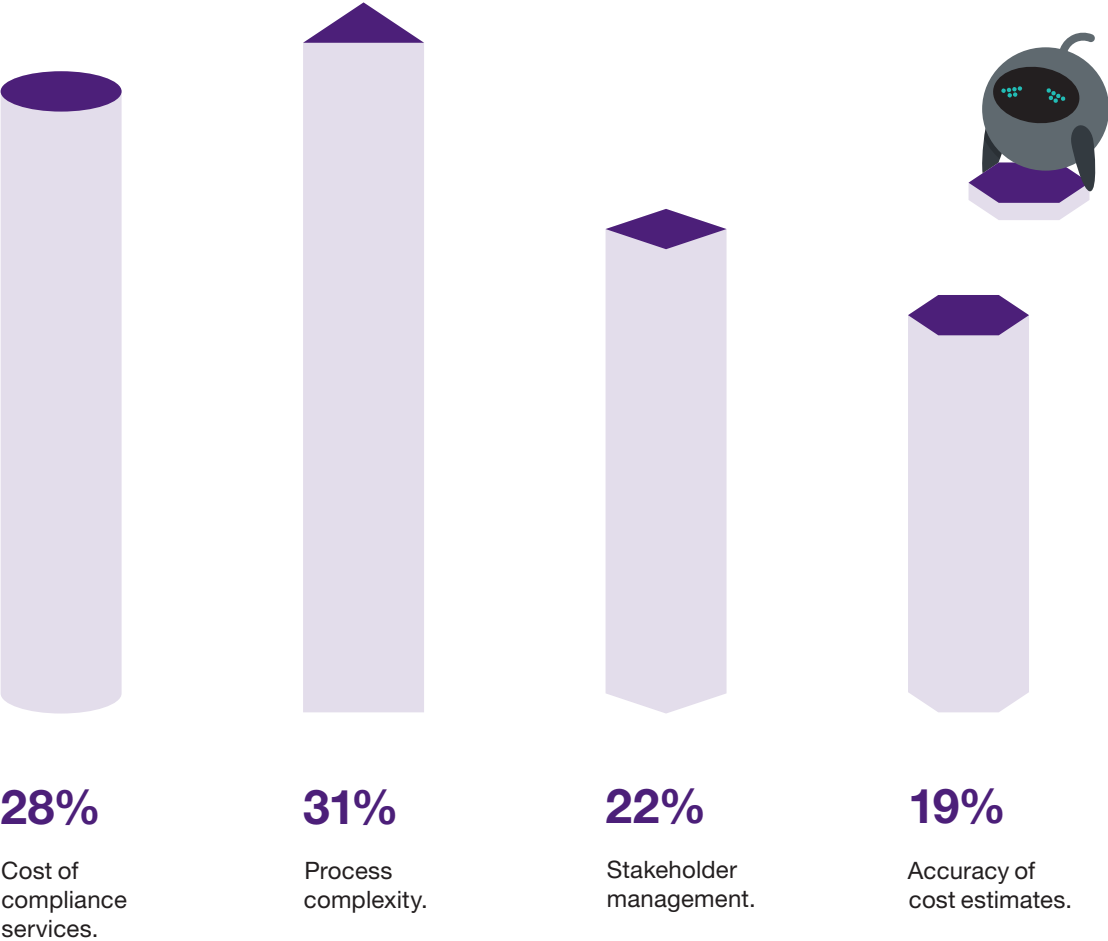
25%

Immigration compliance.

17. Rising to the compliance challenge

GM professionals' top-ranking challenges are complexity and cost, followed by stakeholder management and cost estimate accuracy. Rather alarmingly, Business Leaders predict that increasing compliance and duty of care complexities will have the most significant impact on their mobility organisations within the next two years (over and above changes in skillsets, transformation or outsourcing). This data point is supported by GM professionals who report that compliance is becoming a heavier burden for their functions, with process complexity ranked as the top challenge. The cost of compliance services is highlighted as the second biggest concern, suggesting that ad hoc advisory spend with external advisors has escalated during the height of the pandemic. Stakeholder management remains a difficulty, which needs to be addressed as new types of hybrid cross-border arrangements give rise to new compliance challenges.

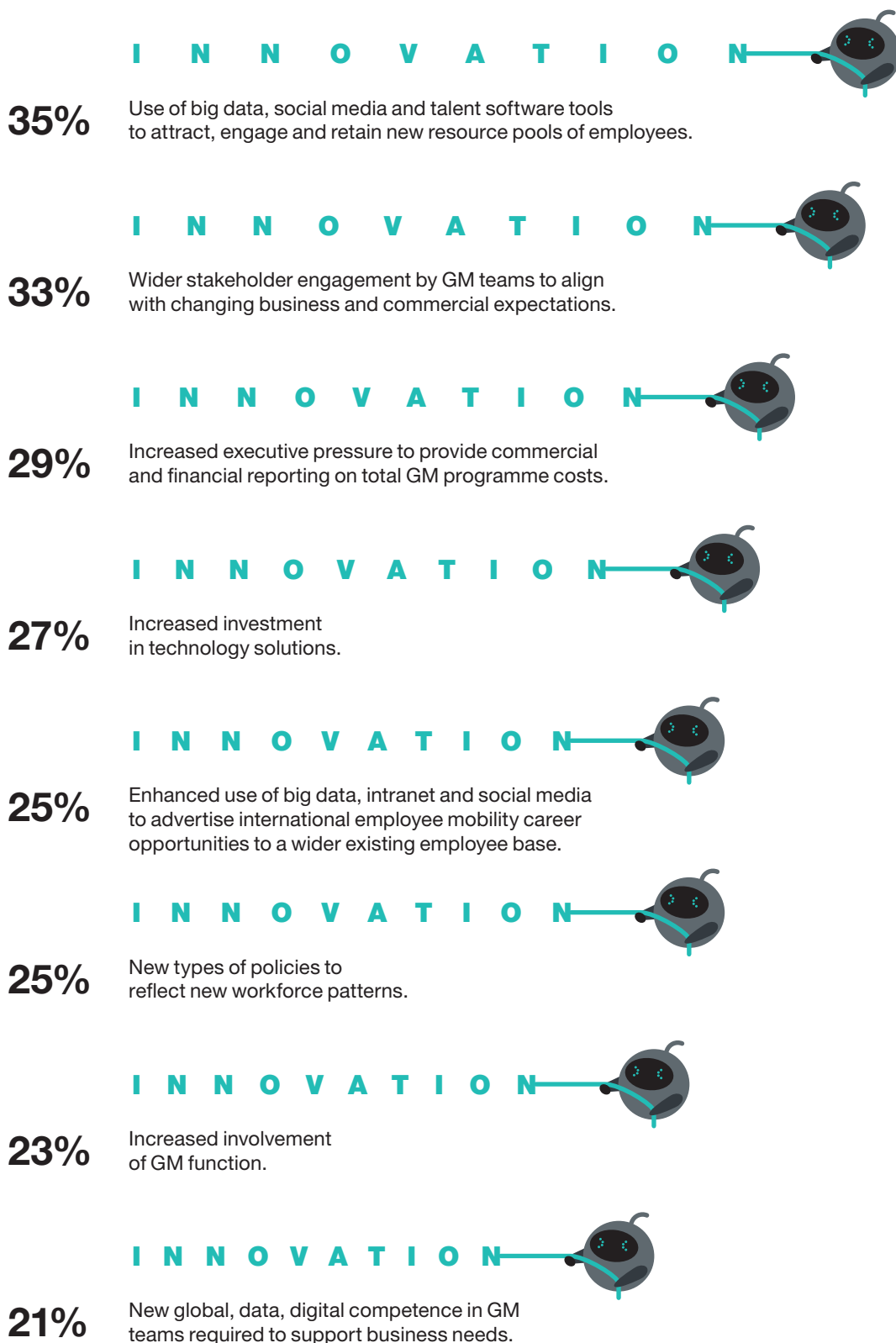
Fig. 17: Biggest compliance related challenges (GM) Fig. A21, Appx, p55.



18. Increased innovation and stakeholder engagement

One third of Business Leaders expect to witness more innovation, engagement, commercial cost management and automation from GM as a direct result of the adverse pandemic trends. The current climate of complexity and uncertainty could be perceived as a perfect storm for the GM profession. GM leaders should capitalise on this opportunity to forge closer relationships with the business and deliver compliance and duty of care solutions which future-proof the people strategy for tomorrow's post-pandemic workforce.

Fig. 18: What impact do you expect these interventions and trends to have on your GM function? (BL)



Conclusion

GM professionals and their organisations are faced with multiple, potentially risk-laden challenges over the coming 12 months and beyond. Their leadership, too, recognise these challenges and will expect their GM colleagues to guide them through the pitfalls of global workforce deployment and their overall governance. Some of the risks are outside of GM's control—the pandemic, changes to employment and fiscal legislation as prime examples.

Inside their organisations, there may be factors beyond GM's control if business management enforce an agenda to mobilise talent without the necessary checks and balances from their GM teams. Stakeholder management will remain both a difficulty and an opportunity: to provide more education and engagement to demonstrate (with financial and other analytics) the implications of not following a protocol of due diligence, process management and policy alignment.

It is also evident that GM must digest learnings from the pandemic and ensure that the key learnings are actioned with revised systems and processes to shield their organisation from crisis management into planned responses.

GM's enhanced visibility is an opportunity to tangibly and practically demonstrate that they too are business management who specialise in GM and global workforce management. Ensuring that they are equipped to deliver the right levels of technical support and demonstrable influencing skills is part of functioning in the new hybrid talent world.

Epilogue

🔍 Your



58%

of Business Leaders pre-pandemic were unaware of GM teams unless they had a reason to know them as users.

🔍 aspirations



73%

of Business Leaders do not have a formalised business investment case for using international work arrangements.

🔍 are



84%

of GM teams are expecting transformation over the coming 12 months.

🔍 your



74%

of GM teams report they plan to invest in new technology over the coming 12 months.

🔍

9%

of organisations reported well-defined processes and tracking in place when the pandemic impacted them.

🔍 possibilities



63%

of Business Leaders do not receive reports on comparing forecast versus actual costs for their international assignees.

The decade of transformation

The results reveal some very thought-provoking statistics. This selection of data points alone demonstrates the absolute priority for GM teams to substantially evolve their actual and perceived business contribution.

GM's role has transformed over the past decade. The pandemic has catalysed the rate at which GM's role has changed and will continue to evolve. It is unlikely that there will be a return to the old ways of working.

As organisations focus on new markets, products and services within a more cost-effective business model and driving out redundant processes.

Enhancing the personal with the digital will become a balancing act and this is never more so a reality for GM.

Maintaining control in a flexible and agile framework will rely upon a digitalised connectivity between all actors in international workforce arrangements. Many organisations are still assessing at leadership level how to get to grips with the increased governance required to comply with national legislation changes, bureaucracy and a zealous appetite to identify and prosecute compliance breaches, particularly those associated with cross-border remote working and virtual assignments.

On the talent front, it is evident that GM expect there to be a resurgence in all talent types plus new hybrid ones and that they are still looking to regularise into a consistent pattern of mobility. This is the conundrum. As the pandemic has blurred working patterns and assumptions on how people and work interact, individuals are simultaneously feeling more liberated from traditional work models, manifesting in more personal choice mobility requests occurring. Organisations and GM teams must redefine their boundaries and criteria for approving new hybrid and cross-border work arrangements. Whether it is a framework, compliance protocols and new policies—these will need to be embedded and quickly.

GM's coming of age during the pandemic era is daunting yet exhilarating in equal measure. There is no turning back—talent mobility is on the rebound!

Spotlight

Insights from HR and Global Mobility leaders

CHROs

Louise Cail

Chief Human Resources Officer
Etex

Transformation

GM at Etex has changed, moving from being a very local Belgian company sending warriors out to pioneer new territories, to transforming into a very globally focused organisation. We want to be more inclusive in terms of how we work, putting more focus on local talent development. Instead of the old way of sending people overseas because we didn't believe in local talent, now we look at how we can give people experience using two way and third country moves.

Our vision is to develop global talent. We need to consider how we can do this in a world with harder borders due to the pandemic. Our mission is to go through that journey and create opportunities. We will achieve this with more project roles rather than fixed roles, which is more dynamic. This allows us to share best practice and learning on projects.

Gone is the history of serial expats—now we are a more fluid type of organisation with more equity in people development.

Within the culture of Etex we have learned how to operate in virtual and hybrid ways. We were behind in this before the pandemic hit, for example, we weren't doing video conferences before. We would travel for a two hour meeting, no matter the distance. We have had to learn the new normal, in a culture that is very much built on face-to-face relationships.

We have continued to have moves during the pandemic as we see the advantages of being physically present where possible. I wouldn't say we are waiting to restart, we had to slow down, not stop. In terms of talent development it will need to be in person. We are looking at graduate programmes that will include mobility as well.

We have seen the negative impact of not being able to get people in the same room. For example, in acquisitions where you can't physically have that exchange in real time and integration managers on the ground. This leads to difficulties to integrate and engage without a strong connection. We have managed, but it's not as smooth.

We are looking at talent acquisition, including acquiring new digital types of talent. You don't have to have people sitting next to your office—you can look more globally. People are looking for flexibility in where and how they work. You will lose talent if you don't give flexibility. Some organisations mandate a number of days in the office, but they will find they are non-competitive for talent.

With work from anywhere, compliance becomes more difficult, both for external hires and existing employees. Managing this needs to be within mobility's scope. The real challenge is what is accepted—will we accept requests for employees to work from their summer house? For some organisations, working from home is from home, not from an island. We tend to be flexible in Etex, but it needs good governance and controls.

This visibility is not surprising, but I don't think perception is the same in Etex. It was like this in former organisations I have worked in—business didn't know much about the GM function. In Etex, because of the history of sending people out and the number of files, combined with a strong internal team, mobility is well known in the business. For us, the function is both advisory and transactional. Strategic because of having more of a global vision, therefore keeping mobility at the forefront. Mobility doesn't look at talent on a local level.

Talent

This hasn't been discussed within the executive team, but I think it will be important as we become more and more global. Excom has become more international and has some international experience, which brings a more holistic view.

For us the connection between ED&I and mobility is pretty good. It's not something that's been flagged on the agenda as an issue. We don't have a male dominated mobility programme. We are looking to drive more gender diversity, but overall we have a pretty good balance in terms of mobility. In the factory it is more dominated male.

The move to a more centralised functional organisation has built a good new cadre of female talent.

This is not data that we have looked at, as it hasn't been seen as an issue. It would be interesting to look into the numbers.

One challenge is that the business doesn't always recognise the true cost with an international mobility (IM) file.

There needs to be value in the cost; we need to think about local talent before sending people—be clear on what is the added value, the end objective, the purpose of sending someone. Is it a lack of local talent, is it development—we try to get the business to think through all of this before deciding.

We are trying to implement a business case before any decision and commitment to individuals is made. The IM should be the first line of contact as a business is considering an IM.

We recently had a senior leadership discussion about building a graduate programme and what investment we would put in. Business is thinking "great, as we can get x number of grads", but they weren't thinking of the cost of a grad mobility programme. We need to know what success looks like. The next generation is not looking to stay in the organisation long-term—we may not retain talent for more than three to five years. A grad programme could build a promising pipeline of new talent if they have had a good experience and recommend it to friends.

Risk

As we have been long-term in most of the countries we operate in, we are quite aware of the risks. Challenges will come as we expand globally into new territories, such as developing further into Africa. We have been in Nigeria a long time, but not all of Africa is the same.

Louise Cail *continued*

LATAM has some challenges for mobility, but we know it and are present for a long time.

Challenges are currently more related to pandemic versus anything else. We need to manage stakeholders and be armed with the right information, advise of delays and on what we can and can't do, what are the restrictions etc. It's really difficult to navigate, so the business really rely on the immigration team for guidance and to find out through their partners.

Olga Kravchenko

Group HR COO

AXA

Transformation

The insurance sector globally wasn't as impacted as some other industries. We were cautious and pessimistic in the early months, but with people staying at home, risks were reduced as people were not driving and there were fewer home related claims. Revenue jumped 10% due to the rise of new risks which became more apparent—pandemia and climate change.

Our half year results are good, but we are still looking at costs and the impact on the business of digital and health insurance. We are becoming selective in terms of geographies, leaving markets where we can't be in the top three or top five. For example, we are selling Singapore. There are opportunities for mergers and acquisitions which are key for our commercial and health business strategy.

HR has been committed to maintain all employment through COVID-19, which has been achieved with most people being able to work from home. This has been a successful strategy for HR.

GM volume has dropped as a result of the pandemic, especially short-term assignments which almost stopped. Graduate development completely stopped as it was not possible to do it. Long-term assignments continued even with the new complications, as these are required roles to fill for business growth. We tried to keep people where they are as much as possible. This year we started out cautious, but now we expect our usual September and October peak to remain steady similar to 2020.

All types of mobility will sit with IMS teams in order to manage all cross-border risk.

Frameworks are in place and discussed at MC level—the CEO and CFO are aware of our approach for mobility. We have good data and figures which we can compare and analyse with talent data.

Critical to engagement from leadership is the ability to deliver good services. At first we tried to approach senior engagement with mobility from a compliance perspective, but that didn't work. I was known as an HRD who runs HR transformation projects, so when I was given mobility I didn't approach it as a compliance topic, but as a business topic. Then you are sitting on table with different stakeholders starting with HR leadership. Our crisis committee has a GM representative. To have this senior business engagement you need to have people with the right knowledge and presence.

Talent

We see emerging assignment types, such as international cross-border workers. Initially this was supposed to grow, but we are very cautious from a compliance perspective. As a culture we don't believe in 100% working from home, so feel hybrid working arrangements are the future. Collaboration in the office is important to embed the DNA and maximise collective intelligence.

We are a federated organisation, but very relationship driven, so having employees sitting in one country working for another will only be by exception. Last year there was some excitement about virtual assignments, but this has reduced this year, due to the importance of being face-to-face.

We do cost projections, but we don't track actual costs. We keep compliance costs tracked centrally. The three key priorities are efficiency, compliance and cost.

There is a reason we send people across the globe, so we don't think virtual/hybrid can work unless by exception. The business prefers people to be where the business is. There are time zone considerations as well as the ability to build good working relationships. We will use virtual assignments only when there is no choice, but it is not part of our future strategy. For example, we need talent that doesn't already exist, or only in short supply—we need space risk underwriters which is niche and new, but exceptional.

If long-term mobility is not an option for some roles, we might do more shorter-term assignments. We have validated with management the strategic commitment that mobility numbers will remain at about 1% of our population. We consider this a healthy target for DNA and culture. Not sure we will enhance this significantly.

We were already introducing more flex policies, being less strict with benefits provided. We are monitoring the success of this approach closely with the business.

Risk

Greatest challenges will be compliance, governments might need money and mobility is a visible target. Restrictions and legislations on movement of people will be more visible than before.

Ensure health coverage and safety—assignees will need much more support and reassurance of health support and health systems where they are going. More hesitance to move to certain locations, with lack of medical support.

New policy and flexibility, cost pressure as cost will increase

Be sure providers are good, e.g. HHG. Capacity to deliver services on global and local levels. Need to be sustainable. Vendor management is a priority for next 18 months. Market might be changed as a result of the impact on vendors of the pandemic.

Assignee experience—in complex situations and all the above issues, we will need a different way to manage and serve them.

GM leaders

Romina Andrea Barbero Etchevarne

International Assignment Manager
Repsol

Transformation

Transformation has as many scopes as one can imagine. In all companies, everyone seems to be talking about transformation—making it leaner, cheaper, more productive. The pandemic kicked the board and we had to start to rethink all of our processes. Global Mobility is undoubtedly one of them. From one day to another, we were all working online and expats were at home too. So, do we need that many expats? What's the balance between the required workforce on paper and the optimal workforce on-site? What's the most coherent and acceptable company cost for international talent?

This is a time to brainstorm, rethink, revisit and redesign a whole new international assignment strategy.

Let's take this moment in time as an opportunity to search for the best value and growth for our companies.

Talent

We always look for the best talent, wherever it may come from, even if we need to search far and wide. Attracting talent is challenging, as the competition in certain sectors can be fierce. Who offers the best conditions? And if we are lucky enough to secure this desired talent, are we ready to send them off anywhere in the world and generate value for the employee and the company?

This is a time to align our talent needs to our assignment policies. Whether experts in a specific discipline or junior employees we need to develop, let's seize the opportunity to analyse our policies in-depth, compare with competitors and check if we are covering what this talent is demanding. We can make a difference, balancing costs.

Risk

Remote workers—such as a theme. Tax residence? Permanent establishment? Social security coverage? Which company is receiving the service? So many issues to check, but one is obvious. As a company, we can never expose an employee and transfer risk to them, nor cause a reputational problem or liability. So currently, this is a trending topic.

Then there are business travellers. Work permit yes or no? Things are changing. Compliance above all, please! Review each case one by one—immigration and tax, always as a team. The magical question is who takes care of this?

Business partners, Global Mobility, who? The pandemic has made companies look at these issues more in-depth, as projects involving many areas and it's not as simple as just saying, "Come and work in the Bahamas". There is much more to it.

Soenke Schiricke

Head of Corporate
International Mobility
Continental

Transformation

At Continental there is more knowledge of GM than these survey statistics due to high levels of assignments in the past. But higher management have no knowledge of the complexity. The pandemic made them only slightly more aware. They have seen how we had to deal with the returnees, but not the big impact of everything else with mobility. Line managers are more aware, in the overall HR organisation.

GM will continue to be important, even more important, because mobility will go back to levels it had, but we will be adding more diversity and complexity in types of mobility or cross-border working. The most important external factor is COVID-19 creating the decrease in traditional assignments.

Internal discussion to split CoE and mobility services. This came at the same time as COVID-19, so we used the opportunity to make broader organisational change and integrate travel management and assignment management in one mobility service organisation.

Building the corona bridge to sustain GM team headcount.

Doing that, we built a strategy towards increasing further service scope, providing expert mobility services for other mobility types which are currently decentralised, such as foreign local hires, localisations, domestic moves, cross-border remote workers and virtual assignments (although we don't yet know what virtual assignments will look like).

Overall organisational pressure focus on three areas

1. Reduce cost (efficiencies).
2. Quality and compliance.
3. Continue digitalisation.

Therefore, centralising mobility knowledge is more efficient and more able to achieve these three objectives than holding it with multiple local HR teams.

We will reduce cost with more efficient processes, less time spent on a decentral basis, making use of purchase optimisation and combining digital options.

Another benefit of a centrally managed programme is overall governance. In the pandemic, it was a challenge knowing where people were, especially with cross-border mobile work. COVID-19 brought all these topics, but cross-border mobile work was a new factor that is now a result of COVID-19. With everyone now having mobile offices, we have to figure out solutions for this.

We have digitalised and outsourced transactional pieces and are focusing more and more on being mobility expert consultants.

Talent

I think all mobility types will grow again. We will see more traditional assignments and business travellers again, but not to the 2018/19 levels until well after 2025. Some of the gap will be filled by foreign local hires.

We will definitely see more cross-border mobile work as we have seen that mobile work itself is possible. The organisation will offer it for national/domestic working and people will tend to optimise their geographic private footprint, especially in next 48 months where travel becomes more easy. People will think they can do this internationally and we need to manage this. We need to set up process, tracking etc. It's super complex and has compliance risks we need to address.

Soenke Schiricke *continued*

On the other hand, although we have all learned that virtual meetings are possible—they do work—but after nearly two years we have also seen that they are not the best fit for all meeting needs. Especially where trust building and interpersonal connections build-up is necessary. Physical encounters will always be necessary and they also allow small talk which builds rapport and relationships.

Many ad hoc discussions are not possible remotely. In an intercultural environment where we need to understand and find common ground, it's important.

ED&I development will depend partly on the ability to be in a country with a team, experiencing more than just the work day through Teams. Intercultural knowledge is much higher when in a country and living the overall environment.

Peter Graham

Group Director
Relocation, Immigration
Santa Fe Relocation

Transformation

Transformation must be more than simply the digitalisation of existing processes. The world had changed dramatically in the last two years and at the very least this has accelerated many changes in how we now live and work. With the worst of the COVID-19 pandemic hopefully behind us, this is a perfect time for HR and Global Mobility leaders to explore the art of the possible, take learnings from recent experiences and build a vision for their future operating model that is truly transformational.

Talent

We have spoken to a large number of our clients in the last 18 months about remote working policy and practice. For some industries, the competition for the best talent globally is a major driver behind their moves to offer employees the best working conditions, including remote working.

Remote working overseas, however, raises a range of compliance issues that also need to be factored into any decision to permit remote working as the compliance costs can be significant. As governments get to grips with this phenomenon, the compliance landscape will likely continue to evolve.

Risk

Business travel compliance is something organisations simply cannot afford to ignore. For many years, organisations have effectively managed tax compliance in the business travel environment by having their tax experts examine travel data after the trip has been completed. More recently, immigration, social security and COVID-19 related compliance are all matters that need to be completed before travel, thus avoiding unfortunate consequences for travellers. Other parts of the company often hold responsibility for these different elements, each of whom often uses different data sources. A more unified approach using a single source of all stakeholders' data is critical to a successful travel compliance programme.

Dinesh Jangra

Global Practice Leader,
Global Mobility Services
Crowe

Transformation

The International HR/GM workload and context has changed forever. It used to be about doing more with less, digitising and being more strategic. It's now all of that plus the increased complexity and workload of a new global post-pandemic risk situation as well as an exploding workload due to international remote workers and the return of relocating employees.

Probably like never before, HR and Mobility have been elevated, at the top table with the business looking for their experience and guidance to negotiate key priorities. HR and Mobility are expected to play a real leadership role and critical to their success will be building the right internal and external support, delivery supply chain and systems. Transformation is essential to staying elevated.

Talent

Perhaps the most precious commodity of all is talent. Talent powers business and enables strategies. The pandemic has brought a new phase to the global talent pool era. As necessary relocations return, addressing talent demand, supply and development needs new virtual and remote assignments present now in parallel new proven options.

These options open mobility as a development opportunity to more of the employee base and support greater EDI participation. Mobility and HR leaders that embrace and enable this new parallel form of mobility alongside relocations will add real value to organisations and their people.

Risk

The pandemic resulted in border, immigration and tax rules and easements changing at an unprecedented pace. In the middle of it was Brexit, bringing new social security and immigration rules to consider too. Keeping up and finding reliable sources has never been so important for internal credibility as well as compliance. Alongside duty of care, compliance risks over the last year have exploded. Intra-European mobility touching the UK is different and the rise of the cross-border remote worker has increased the volume of mobility issues to manage markedly. The risk landscape is different, Being agile, consultative and developing new approaches and policies at speed to apply to manage cost and risk has never been so important.

Ernst Steltenpohl

Co-founder
Expatriate Academy

Transformation

From an HR and GM perspective, I see two critical issues for HR: redesigning and redefining the contribution and creation of an HR structure that should facilitate achievement of organisational strategy.

Ernst Steltenpohl *continued*

The two design directions

1. Organisations that will redefine and reorganise their business unconnectedly from existing conventions and structures.
2. Those that will use existing structures and outputs as starting points and optimise them for the new environment.

I hope organisations will opt for the first direction.

Ernst Steltenpohl *continued*

The pandemic was a wake-up call. How can we become more robust without sacrificing flexibility and responsiveness? The most important lessons were that organisations that had ensured GM expertise appeared to respond much better and faster to the new circumstances than companies that had outsourced essential parts of the GM processes without retaining sufficient internal expertise.

In an age of rapid digitalisation, it seems that you have to say yes to digital innovation. Such an approach is often more about building on the existing than answering several crucial questions. Investing in IT tools for GM does not solve the problems of the current HR databases. It is an implicit risk that another new system is added to existing IT structures. This is why I hope organisations take the opportunity to redefine the purpose of their HR functions, the contributions and the enabling systems needed to drive competitive advantage, rather than bolting on another HR system to their IT platform.

I recently worked with the CEO of a large FMCG company, who told me how much they invested in understanding their customers' needs and responding to them with personally designed products. This provided unique results and detailed insights.

Paradoxically, I then asked whether the organisation had mapped out their employees' wishes and needs in the same way and what results had been achieved? Clearly, their response was a work-in-progress. A holistic approach to connected thinking—especially with IT systems, is essential to achieve the same success as with their consumer clients.

Talent

The mobility restrictions during the pandemic have created a whole new vision of how organisations can resource and successfully thrive. The wide range of possibilities to work cross-border requires suitable organisational (international) structures to enable and manage this. An equally important organisational platform is the knowledge component: knowledge of the first-line HR employees, their managers and business leaders, and the GM specialists.

Combined, all of these insights deserve a rethink on the role and position of GM: An executive role, reporting to the Board of Management or just below it.

Risk

Taking managed risks is one of the aspects of doing business, now more than ever before. This also applies to our GM specialists, who also have to take risks in their field so that their organisation can function successfully with the talent that makes it possible. Deliberation with the compliance challenges is a whole new phenomenon due to outdated laws and regulations.

Compliance is a challenging subject that requires the necessary investment but can also protect an organisation from high financial penalties and worse. The business and talent need to balance compliance are less visible: the organisation's drive to compete internationally and employees' expectations have often changed significantly due to the COVID-19 pandemic.

Today's reality is that the various cross-border and national rules and regulations no longer match the current context in which organisations have to work and even less with how their employees work.

It is particularly challenging to work in a situation where business-wise, there are practically no national borders and the employees work cross-border in large numbers, whether or not from a location, from home, or elsewhere. At the same time, laws and regulations are based on virtually non-existent situations.

Authors

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Group Head of Consulting
Santa Fe Relocation

Recognised as a thought leader and speaker on strategic international HR, talent management and GM, 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 GM programmes; focusing on aligning strategic objectives with operational delivery.

Julia Palmer

Chief Operating Officer (COO), Relocation
Santa Fe Relocation

A respected mobility advisor globally, Julia has 20 years' Big 4 experience working with clients across all regions and industries to develop their GM strategy and supporting framework. She has forged her expertise by transforming the mobility programmes of a wide range of organisations, from multinational conglomerates to brand new start-ups seeking to globalise; consistently enabling these clients to form closer links between the talent and mobility agenda, with the use of data and insights.

Selina Jones-May

Global Specialist HR Leader,
External Advisor, Freelance Consultant
Jones-May Consulting

Embarking on her journey as a Big 4 expat tax consultant, Selina undertook several client secondments which ignited her passion for GM and her desire to move in-house. During the tenure of her most recent in-house position as Group Director she progressed through a variety of hybrid senior HR leadership roles, including global ownership for Mobility, Benefits, Expatriate Compliance and Strategic HR projects. Selina is currently self-employed as a Freelance Consultant and has also been appointed as an External Advisor to a leading management consulting firm.

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Process

Savanta surveyed 731 professionals responsible for GM programmes across 35 countries. In addition, 52 Business Leaders were surveyed, spanning the UK, the US, France, Singapore and Hong Kong.

Survey respondents represent organisations that in total employ

At least 4,675,730 staff globally. At least 16,591 full-time and part-time GM professionals Respondents globally manage at least 626,525 internationally mobile assignees.

Respondent location

Europe = 49%

Asia = 42%

North America = 2.5%

Africa = 2.5%

South America = 0.6%

Middle East = 3%

Australia/New Zealand = 0.4%

Industry sector

Agriculture, forestry, fishing & mining = 2%

Arts, entertainment & recreation = 1%

Automotive = 4%

Construction & engineering = 9%

Consumer products (FMCG) = 3%

Education & training = 4%

Finance, insurance & legal = 24%

Governmental & diplomatic = 2%

Health & pharmaceuticals = 5%

Hospitality = 2%

Manufacturing = 11%

Media = 1%

Nonprofit/charity = 1%

Professional & consulting services = 6%

Real estate = 1%

Retail & wholesale = 4%

Technology incl. comms. = 8%

Transport & logistics = 5%

Travel & tourism = 1%

Utilities, energy & waste mngt. = 3%

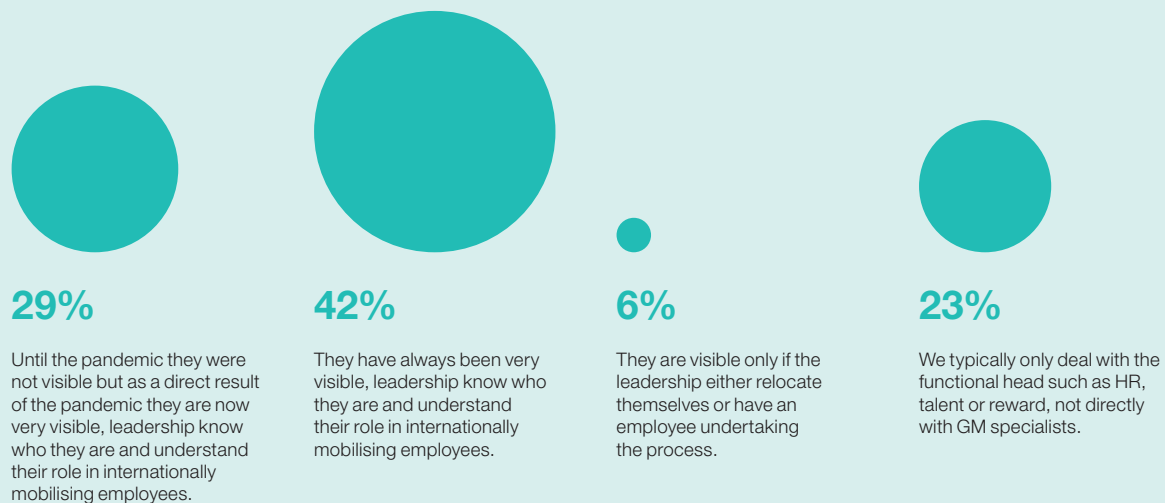
Other = 5%

Appendix

Transform

A1. Global Mobility teams have become more visible (BL)

58% of Business Leaders were unaware of GM before COVID-19 or only aware if involved with an assignment.



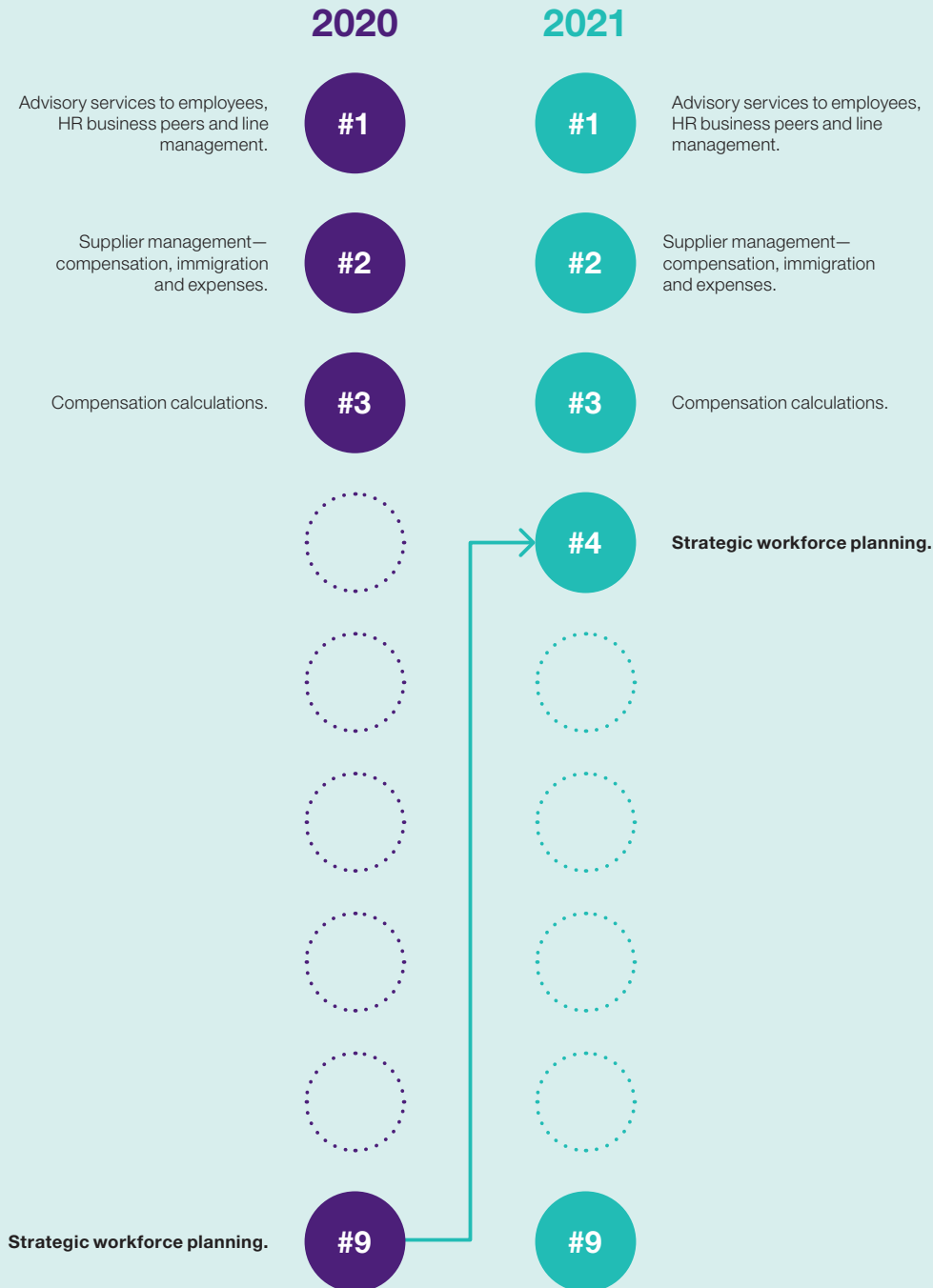
A2. Global Mobility teams have become more visible (GM)

Majority of Global Mobility roles expected to change in a post-COVID-19 world.



A3. Evolving GM skills and competence—talent and advisory focus (GM)

Activities that currently take up most time for GM Professionals.

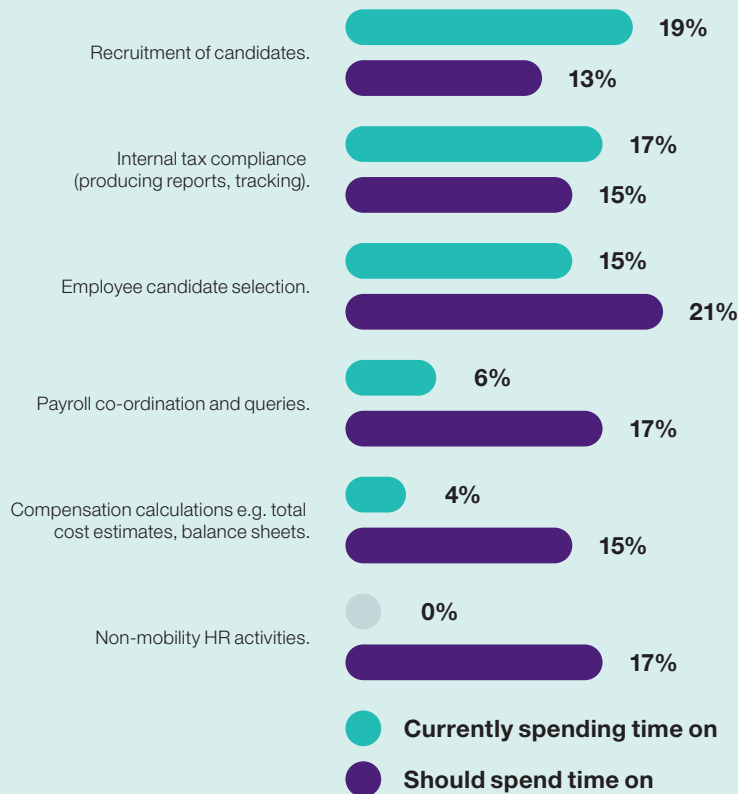


A4. Evolving GM skills and competence—talent and advisory focus (BL)

From the perspective of Business Leaders, GM Professionals are not spending enough time on compensation calculations and payroll co-ordination.



A4. Evolving GM skills and competence—talent and advisory focus (BL) continued



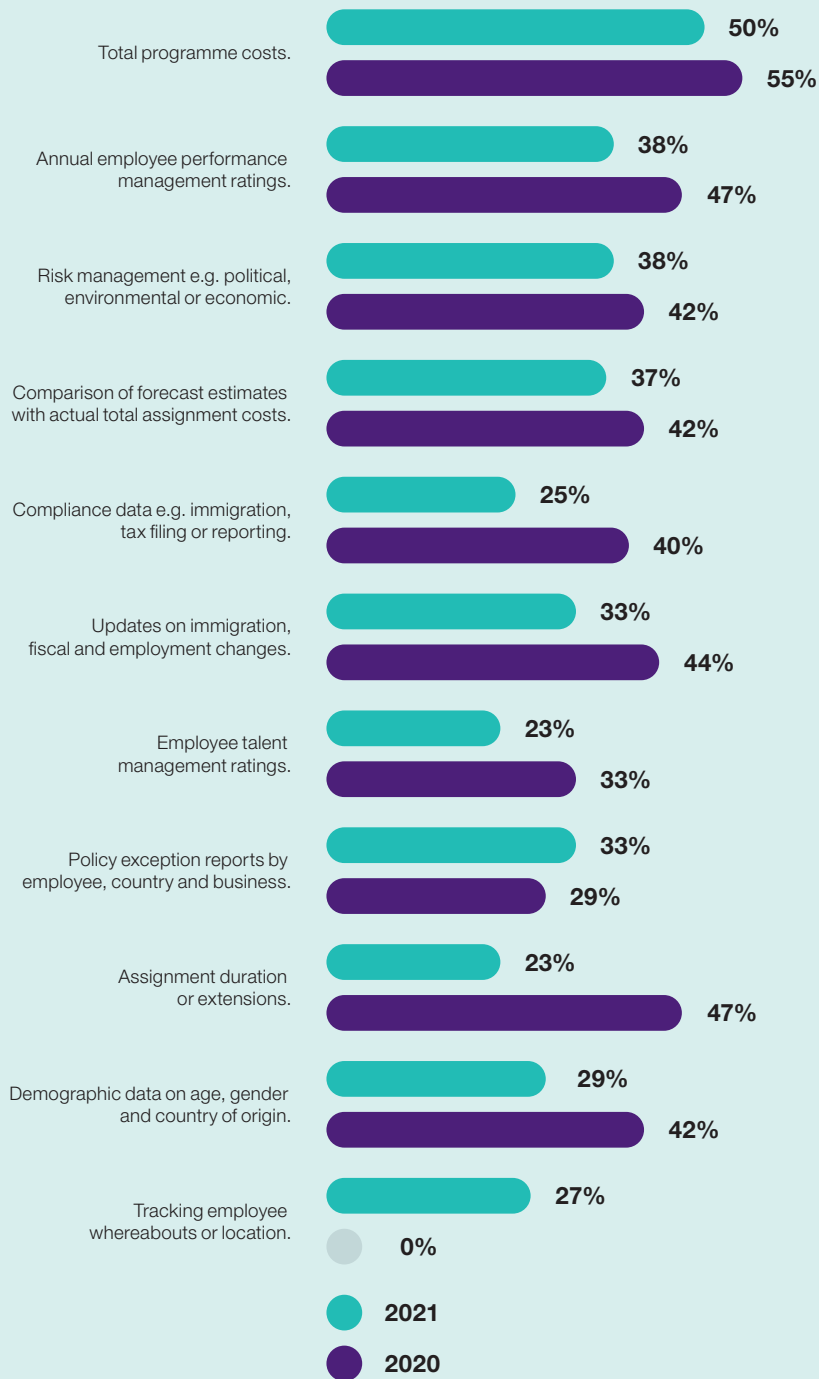
A5. New GM hybrid role: demonstrating commercial and analytical focus (BL)

Of those who have a formalised business case, the most popular way of evaluating the immediate post-assignment return on investment is to achieve employee personal talent objectives.



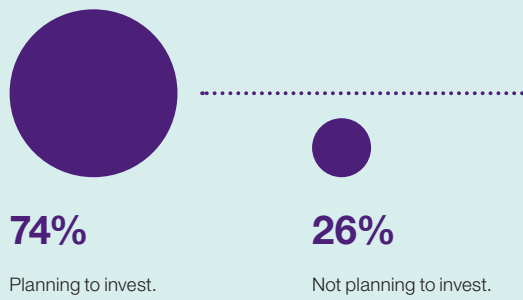
A6. Analytics (BL)

Business Leaders are receiving less data from their GM team in 2021 than last year, besides in policy exception reports.



A7. Technology – growing trend to invest over the next 24 months (GM)

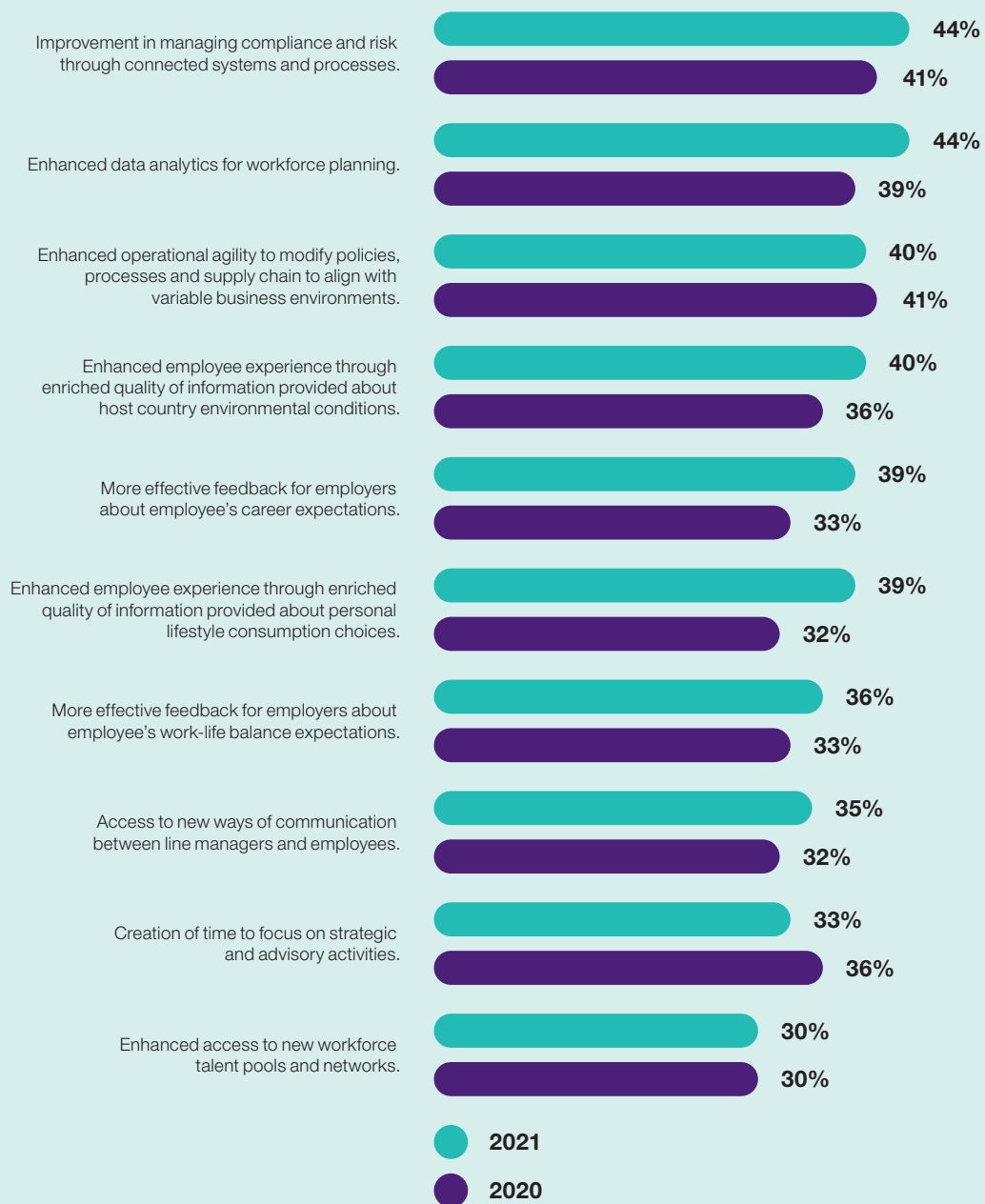
Three-quarters (74%) of Global Mobility teams are planning to invest in new technology in the next 24 months.



Business size	Percentage planning to invest in new technology
<250 employees	81%
250-999 employees	88%

A8. Technology – growing trend to invest over the next 24 months (GM)

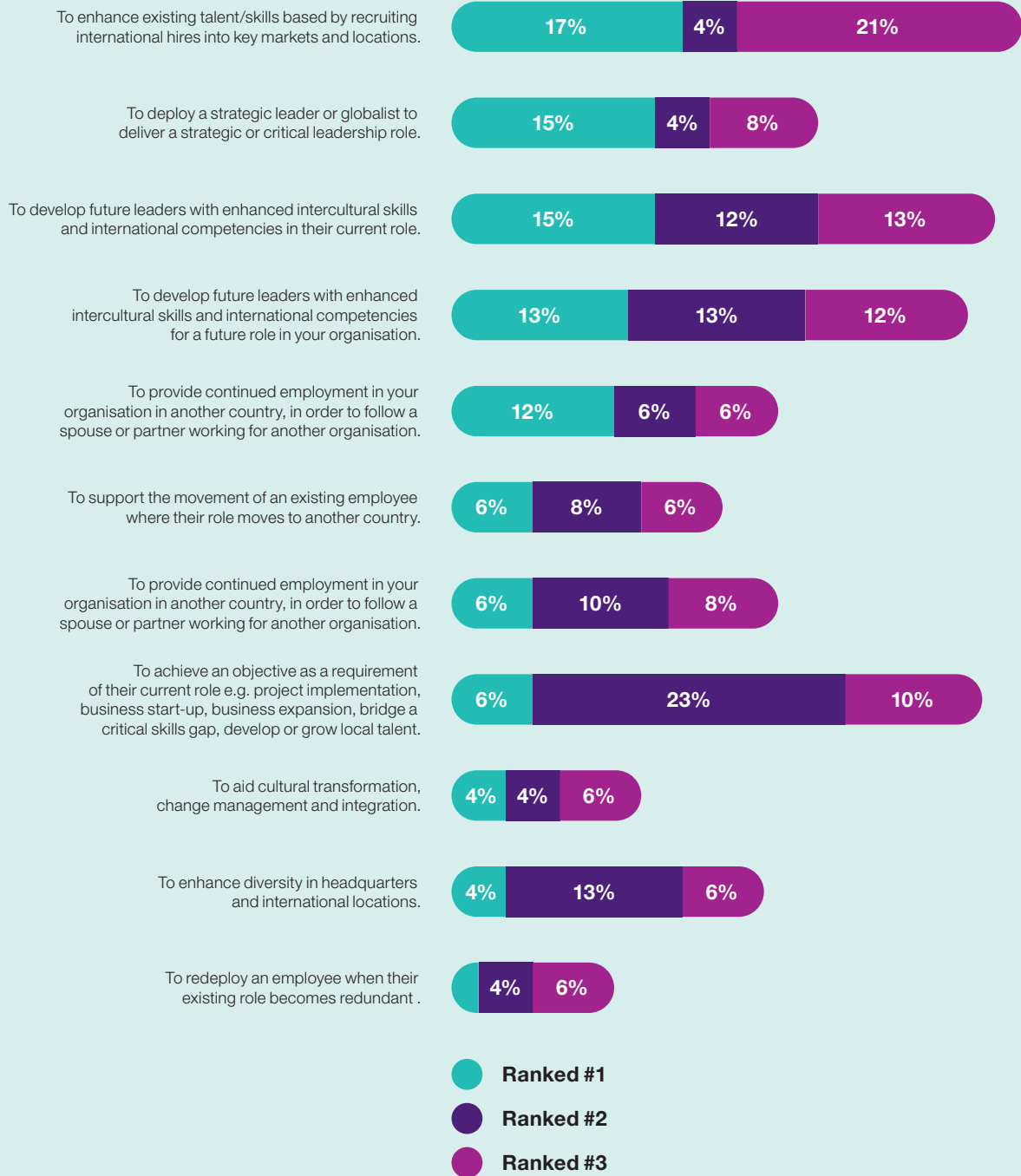
Awareness of digital innovation has improved in most areas measured since 2020.



Talent

A9. Strategic and business driver insights (BL)

Awareness of digital innovation has improved in most areas measured since 2020.



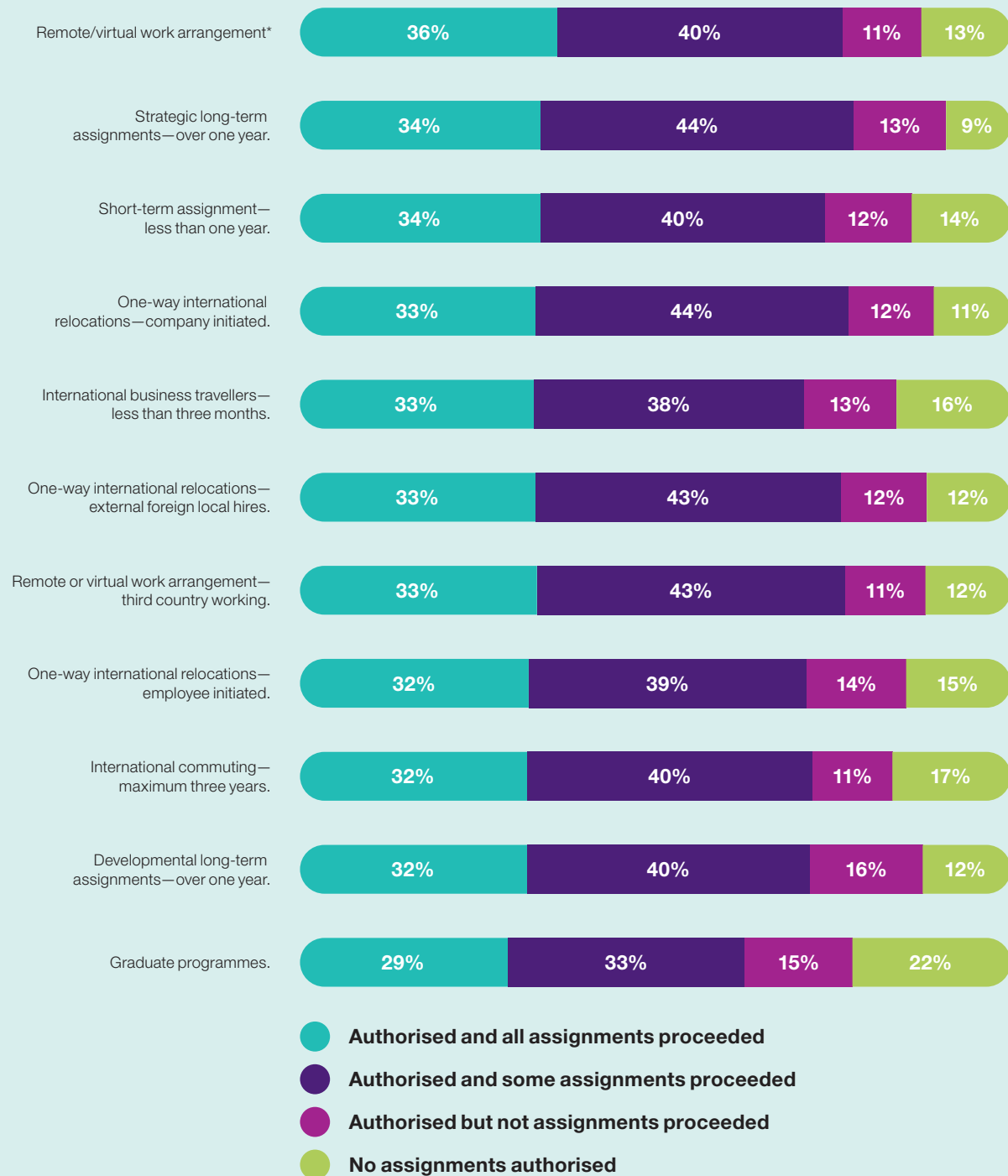
A10. Remote working and virtual assignments (GM)

Remote/virtual ways of working, such as hybrid working roles and more virtual assignments as part of global virtual teams seen as biggest changes expected amongst internationally mobile workforces over the next 24 month.



A11. What actually happened to mobility in 2020? (GM)

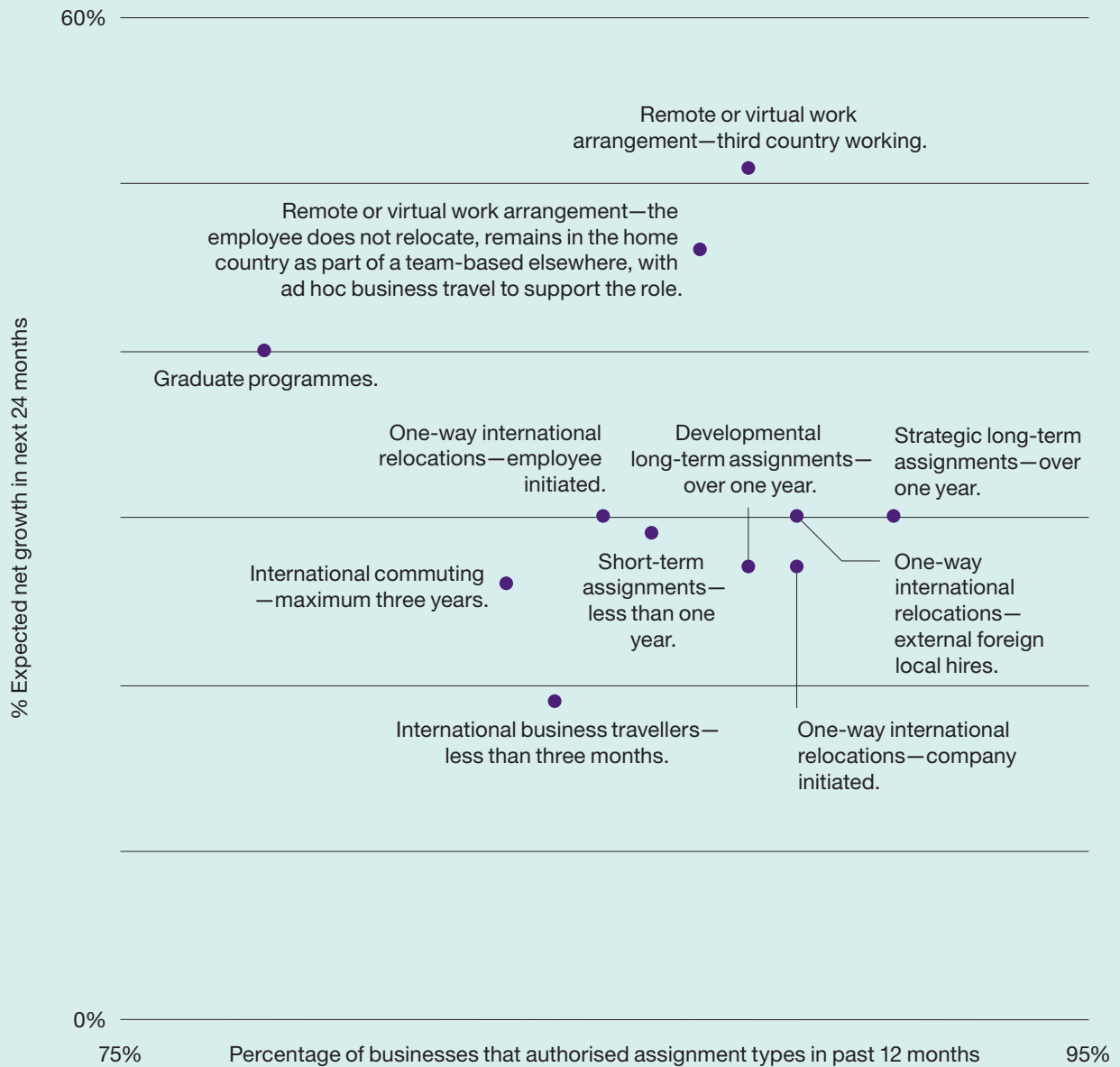
Types of assignments authorised in the last 12 months and the extent they have proceeded.



*Employee does not relocate, remains in home country as part of a team based elsewhere, with ad hoc.

A12. Resurgence or unravelling? Pandemic assignment selection trends (GM)

Businesses undertaking assignment types over last 12 months and expected growth in each type of assignment for next 24 months.



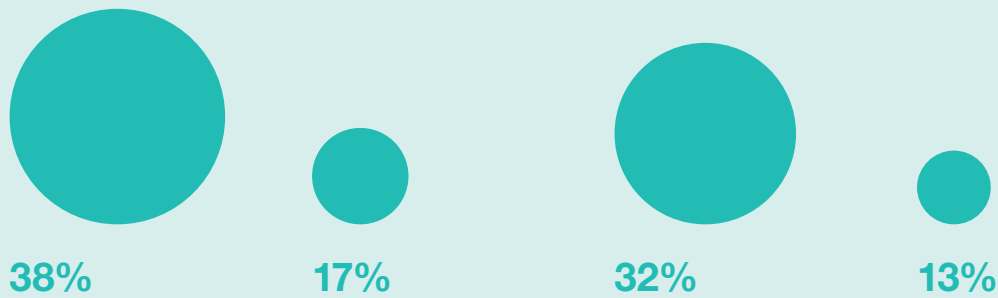
A13. Mobility spotlight 1—Equality, diversity and inclusion (ED&I)



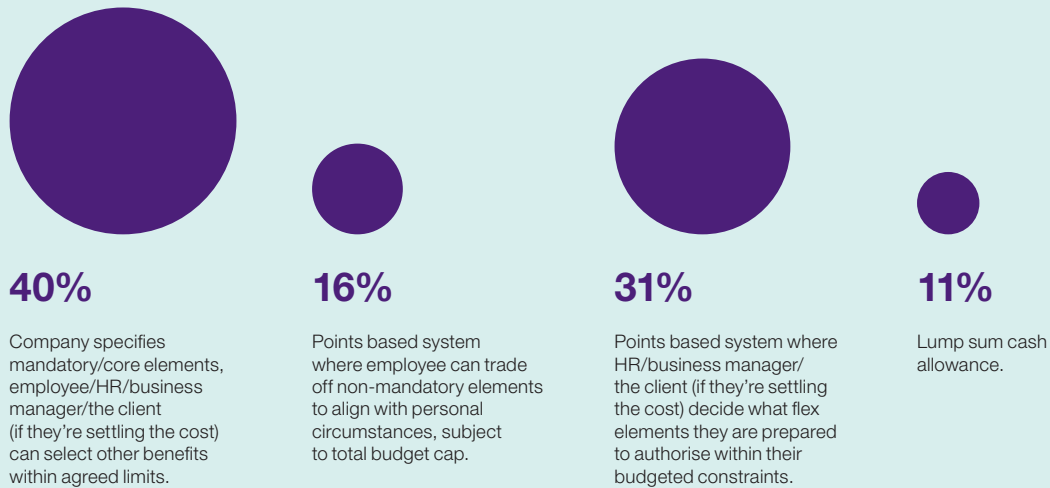
A14. Mobility spotlight 2—Core/Flex policies (GM)

Core/flex policy frameworks that have already been implemented vs. considering being implemented.

Already implemented



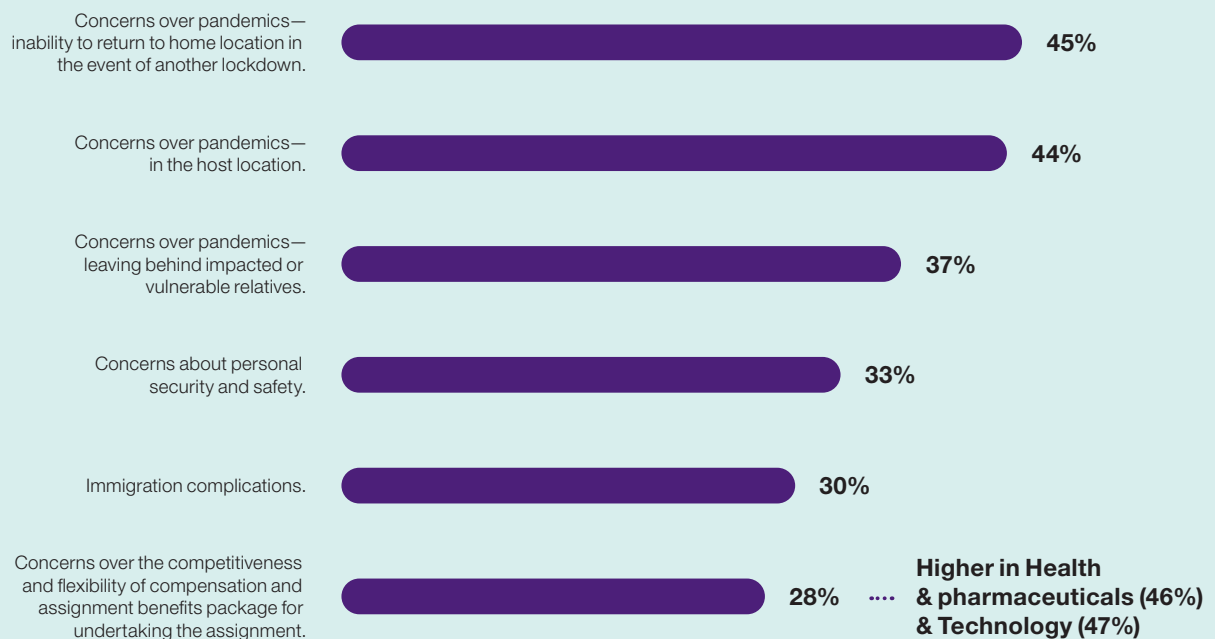
Considering implementing



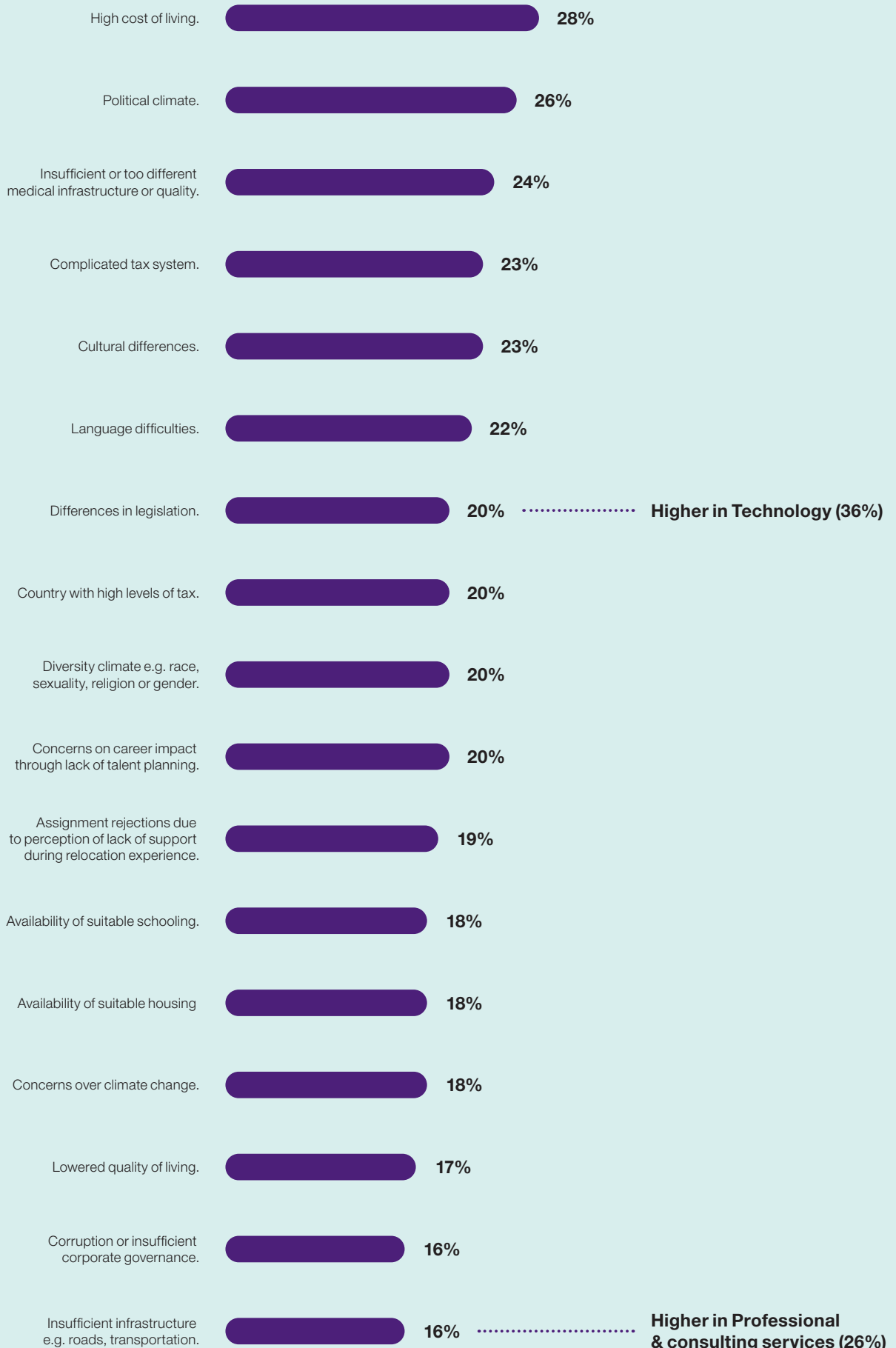
Risk

A15. A climate of uncertainty (GM)

Concerns over pandemics seen as main challenge expected to achieving Global Mobility objectives over the next 24 months.



A15. A climate of uncertainty (GM) continued



A16. Bridging the data gap (GM)

Improvements in data provided by Global Mobility teams to the wider business since last year can be seen in areas such as total programme costs and annual employee performance ratings. However, assignment duration/extensions has lessened.



A17. Bridging the data gap (GM)

Over half (53%) still think that total programme costs is data that GM teams should be providing to the wider business.



A18. Business travel outlook (BL)

Just over half of Business Leaders expect to limit business travel to essential trips only over the next 12 months due to COVID-19.



A19. Crisis management learnings (GM)

Stronger guidelines are needed for future crisis management situations and ideally these would include the opinions of GM leadership as well as local and international locations.



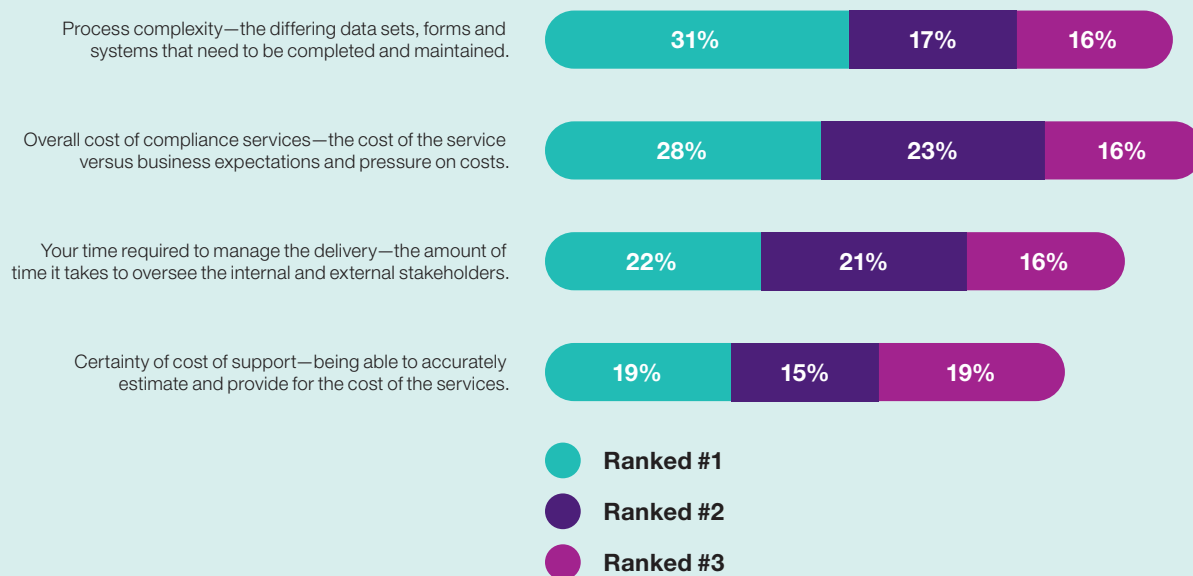
A20. Duty of care in the pandemic era (GM)

Main challenges expected to achieving Global Mobility objectives over the next 24 months.



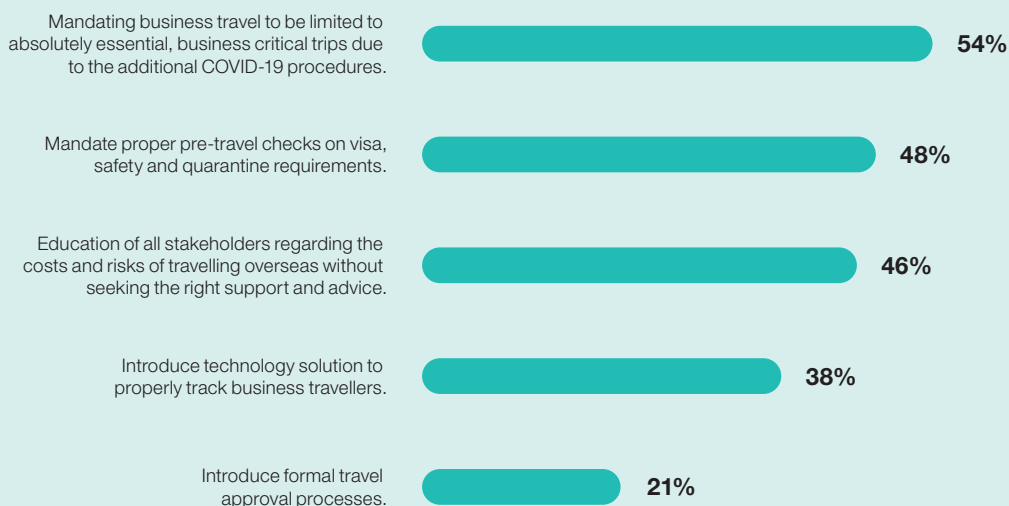
A21. Rising to the challenge (GM)

Businesses face a range of compliance-related challenges, with process complexity only marginally being selected more frequently than the other three challenges measured.



A22. Rising to the challenge (BL)

One third of Business Leaders think that these trends will result in more innovation, as well as wider stakeholder engagement by GM teams.





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