



SANTA FE  
RELOCATION

# REVISION

Mobility through the looking glass



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# VISION

**Now, more than ever, organisations are faced with a rapidly changing world which is disrupting traditional ways of working. Globalisation continues to be important for business growth, and to be successful, organisations must be agile to ensure they have the right skills in the right places. Challenges to achieving this are not only tighter regulatory controls and increased protectionism, but also a new type of war for talent—new digital skills are needed, some which exist and some which don't, creating an interesting global competition for talent. Added to this, or perhaps as a result of this, the expectations of the workforce from their employment terms have shifted the balance of the employer/employee relationship. Employees expect flexibility, diversity, and the ability to work where they want.**

Faced with these changes, HR and Global Mobility teams need to consider what they need to do now, and in the future, to continue to enable businesses to achieve their growth objectives. Ability to buy, build and grow global talent pools; motivate and retain the right talent; and to mobilise skills compliantly and speedily will all be essential. Working closer together between functions and providing greater global oversight, as well as insight through data and analytics are critical. This may mean a change in the roles and skill sets required within HR and Global Mobility teams, to provide a different service to their businesses and controlled flexibility to employees. Now is the right time for Global Mobility to reflect and revise not only on policies and processes, but on the Global Mobility organisation itself.

**Julia Palmer**  
Group Head of Relocation  
and Assignment Management  
**Santa Fe Relocation**

**Survey at a glance**



## International work arrangements

**5.2m**

total number of staff employed by organisations that took part in this survey.

**675,000**

internationally mobile employees managed by organisations that took part in this survey.

**1m+**

business travellers managed by organisations that took part in this survey.

**70%**

of businesses initiated short-term assignments in 2018 and 63% of businesses initiated long-term assignments.

**32%**

of all international assignees were female.

## Global Mobility (GM) organisation

**57%**

of North American GM teams predict strategic functions will be absorbed by HR business partners or divided between talent and reward.

**44%**

improvement in managing compliance and risk through connected systems and processes.

**56%**

of GM teams do not produce cost estimates for long-term assignments.

**55%**

of GM teams do not provide data analytics on total programme costs.

**61%**

of GM teams are planning to invest in new technology over the next 24 months.

## Risk and compliance

**40%**

of GM teams relocated staff to new destinations in the past 12 months.

**33%**

of GM teams view immigration compliance as the main challenge to achieving GM objectives over the next 24 months.

**40%**

of GM teams identify cultural differences as the key factor in challenging locations.

**65%**

of GM teams have an immigration programme in place to ensure their business travellers are compliant.

**68%**

of GM teams use Excel spreadsheets to manage business travellers.

# OVERVIEW



## ... thinking

**Those of us working in the Global Mobility industry will tell you that it can be frustrating, challenging, complex—sometimes even scary. However, when executed well it can also be exciting, fulfilling and often a series of puzzles that could have a series of different endings.**

Global Mobility professionals engage in a multitude of activities: compliance (organisation and employee), supply chain (from international medical plans to household good removals), compensation, and expense management globally. We are a community of professionals who support, network globally and seek out new ways of delivering value to our organisations.

Increasingly, Global Mobility is connecting more formally with broader HR and Centres of Excellence such as talent and reward on a range of subjects: workforce planning, innovative policies and advisory services to both executive management and employees to facilitate compliant and informed ventures into new locations.

Stable and agile, competitive, capable and employable—these are all words that we hear, read about and adopt regularly in our professional world. They will in fact become increasingly critical over the coming months and years as new roles and new ways of thriving in an automated world are not tomorrow's fiction but today's reality.

We continue to incorporate consistent themes from prior years in 2019, in this eighth edition of the survey, adding some new questions. As a further development to the inclusion of Business Leaders, we also include insights from Executive HR leaders in financial services, professional services and manufacturing. Furthermore, we have invited new industry experts in addition to some regular specialists who have kindly contributed over recent years.

### **John Rason**

Group Head of Consulting

**Santa Fe Relocation**

## Foreword ...

One challenge for HR leaders is when to act as an HR person, and when to be a business person whose specialisation happens to be HR. Aligning talent and mobility with business strategy requires that business focused mindset.

**Peter Ferrigno**  
Global People Director  
**Santa Fe Relocation**

# Why REVISION?

Our 2018 survey, **REACT**, focused on why and how organisations and their Global Mobility teams need to take action to affect change. It is very pleasing to see that progress in implementing change and shifting roles is being made in the findings of the 2019 survey.

This shift is still a work in progress, and it is recognised that organisations will be at different stages in their maturity cycle in managing Global Mobility programmes. Industry sector and appetite for investing in alternative solutions will also impact make or buy decisions on Global Mobility specific technology solutions.

**Revision therefore offers a duality of purpose and desired outcomes.**



## REVISION

What due diligence and transformation work still needs to be done to ensure that Global Mobility remains a relevant and sustainable contributor to the deployment of internationally mobile employees?



## Doing your revision?

- 01 How is the purpose and mission of the Global Mobility team defined in your organisation?
- 02 If no Global Mobility team exists (or even if it does), if you were using a blank canvas, what would you change and why?
- 03 What Global Mobility team outcomes enable executive value drivers?
- 04 How do you plan for:
  - a. Increasingly complex compliance scenarios.
  - b. Greater talent diversity/international work arrangements?
  - c. Impact on governance?
  - d. Expansion into new locations?
  - e. Artificial Intelligence (AI) and technological impact on team structures and workflows?
  - f. Social media and broader communication with leadership and internationally mobile employees?
  - g. Business travellers being within this remit?
- 05 What level of sponsorship is appropriate for the transformation journey?
- 06 Who needs to be engaged in your change readiness assessment?
- 07 What decisions are necessary to deliver your desired resourcing decisions, future state structures and data analytics?
- 08 Is there a roadmap and timeline to ensure sufficient time to select external partners, if this is part of the future state?
- 09 What internal communications will be necessary to ensure commitment to the future model?
- 10 What development and training will be necessary where roles are changing?

## REIMAGING

The 2019 survey findings highlight again that there is an opportunity to clearly educate internal and external stakeholders such as Business Leaders to better understand not only the current roles of Global Mobility professionals but also the potential future contribution that Global Mobility can make to organisational development.

### Out of sight, out of mind?

## Leader's view

**We are pleased to welcome you to Santa Fe Relocation's eighth annual Global Mobility Survey. As we deliver on our mission to help you and your internationally mobile employees to work, live and thrive in new places around the world, we believe that it is important to keep abreast of trends that our clients are experiencing as they mobilise their people.**

The survey and the related series of white papers and webinars that our consulting team produce throughout the year are a key part of that. By understanding the themes and trends as they emerge, we can develop and enhance our products and services—and we can ensure that we and our customers can stay on the leading edge of Global Mobility. As ever, I'd like to thank our customers and the distinguished and diverse panel of external specialists for their thoughts and insights.

The world is one of conflicting priorities, and continuously accelerating change that requires constant adapting. That very much describes the everyday of managing mobility, whether inside a company or in a specialised mobility company. In my view, mobility has never been more important. Mobility is critical for organisations who want diversity and the ability to operate across borders, enter new markets, find talent anywhere, continuously improve their employee experience—attracting, developing, retaining and getting the most value from their talents, wherever in the world that may be.

Mobility is also crucial for our society at large. The world as we know it, is built on mobility and migration. Otherwise, we would all still be in the 'Great Rift Valley' and we would not have explored, learned, developed and shared knowledge across the world. As Hans Rosling convincingly writes in his book 'Factfulness', the world has become a substantially better place to live, in large part due to Global Mobility, enabling billions of people to no longer live in poverty, and for billions of people to improve their quality of life.

Working in mobility is so much more than merely moving people to new jobs around the world. At Santa Fe, we are proud to be working with some of the world's leading organisations and thinkers within mobility. We explore, learn and develop every day, in close collaboration with our customers—so we can deliver our part—and enable people and organisations to work, live and thrive in new places around the world.

### **Martin Thaysen**

Group Chief Executive Officer

**Santa Fe Relocation**



**VIEW**



# Contributors

In addition to sharing the results from the Global Mobility Survey 2019, this report also provides critical analysis and insights from 17 industry leaders.

## Santa Fe Relocation

### Peter Ferrigno

Global Practice Leader  
Immigration and People Director

As a highly experienced Global Mobility consulting practitioner, Peter has more than 25 years' experience working for the big four, establishing and building Global Mobility practices across Europe. He has worked as a senior advisor to many FTSE 100 and Fortune 500 companies and, in his current role, aligns people and business strategies that support customer satisfaction and overall process improvement initiatives. His advisory expertise spans across Global Mobility, tax, immigration and HR. He is a chartered tax advisor and is a chartered accountant.

### Robert Fletcher

Senior Vice President  
of Mobility Solutions

As someone at the forefront of Global Mobility operations, Robert has shaped many of the industry's quality standards and processes. With over 30 years in HR and Global Mobility, he has developed a wealth of knowledge stemming from vast experience of helping organisations develop world-class mobility programmes and leading-edge service delivery solutions. Robert has both distinguished and meritorious service awards from the Employee Relocation Council (ERC) and served as chairman of the Global Workforce Symposium.

### Peter Graham

Group Director of Visa  
and Immigration

Peter is a recognised thought leader and speaker on immigration, border management and security with almost 30 years in these fields of expertise. He has worked at every stage of the immigration lifecycle, including both national and international policy-making and strategy. After spending 17 years at the UK Home Office and 10 years leading IBM's global border and immigration business, Peter joined Santa Fe Relocation in 2017.

### Julia Palmer

Group Head of Relocation  
and Assignment Management

A respected mobility advisor globally, Julia has 20 years' big four experience working with clients across all regions and industries to develop their Global Mobility 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.

### John Rason

Group Head of Consulting

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. He 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 is a fellow of the Chartered Institute of Personnel and Development (FCIPD)

## External contributors

### David Carmichael

Director, Global Mobility COE  
CGI

David is an experienced Global Mobility professional of many years, having worked in the profession for over 25 years. He is the director of Global Mobility at CGI, the Canadian headquartered information technology and consulting corporation. Prior to joining CGI, David worked as a service provider with two leading consulting firms and, before that, was based in the Sinai Desert for five years as the expatriate manager for a multinational peace-keeping organisation.

### Brian Horn

Group General Manager,  
International Assignee Services  
International SOS

Brian's 30 years of human resources and mobility experience were gained managing departments and projects across three continents for some of the world's most foremost organisations. He joined the industry as a graduate trainee and has primarily focused his expertise on implementing, developing and transforming assignee policies to create dynamic and efficient programmes that match constantly evolving Global Mobility environments. His achievements, including the personal oversight of HR functions in over 90 countries, have been recognised with several inter-company and industry awards.

### Dinesh Jangra

Partner, Head of Global Mobility  
Crowe UK

Dinesh has more than 19 years of experience in providing cross-border technical advice and assistance in the deployment of talent by all sizes of global organisations. He has led and developed Global Mobility compliance and advisory programmes for some of the world's leading organisations and specialises in the delivery of multi-country and multidisciplinary programmes and cross-border technical, policy and process advice aimed at reducing costs and enabling global visibility. His expertise lies in identifying and advising organisations on issues and opportunities pertinent to operations that cross international jurisdictions and the cross-border roles of their employees. He enables clients to plan and proactively manage their overall people-related costs and risks whilst avoiding the pitfalls of non-compliance.

**Selina Jones-May**

Group Director of Global Mobility and Global People Projects  
**Worley**

Selina is currently leading the mobility and international benefits COE at Worley, an Australian headquartered engineering and construction company. Her role is responsible for the delivery of all operational, commercial and strategic aspects of mobility globally, international benefits and expatriate tax. She has 18 years of corporate experience across multiple industry sectors, including a big four consulting background. Selina holds several professional qualifications (FCIPD, FCPHR, CTA, ATT (Fellow), SCRP, SGMS-T, PRINCE2) and has won several individual and team mobility awards during her career to date.

**Gerald Moor**

CEO  
**The Inkerman Group**

Gerald is an industry recognised leader in the world of specialist security, both in the UK and abroad where he is the owner and CEO of The Inkerman Group and Deutsche GmbH. His career includes 20 commissioned years in the British Army where he was involved in international intelligence arena. Upon leaving the services, he founded and ran a manufacturing business, where he also invented and developed the world's only back mounted propulsion system with a variable speed control. His previous experience includes being a director of the British Sports Manufacturing Association, chairman of the Diving Trade Association, Chairman of a hospital offering innovative services, governor of a state community college and Master of the Worshipful Company of Security Professionals.

**Phil Renshaw**

Doctoral Researcher  
**Cranfield University**  
Founder and Director  
**Circulus**

With a background in international banking, treasury and as a Finance Director, Phil is regarded as an expert in the value of international assignments. His work as an executive coach exposed him to Global Mobility and hence the passion to understand why so much is invested in mobility with so little knowledge about its value. He is a doctoral researcher at Cranfield University and a Henry Grunfeld Research Fellow at the London Institute of Banking and Finance. Phil is author of 'Coaching on-the-Go'.

**Prof. B. Sebastian Reiche**

Professor and Department Chair of Managing People in Organisations  
**IESE Business School, Spain**

Sebastian's expertise focuses on Global Mobility, the varied forms of global work, knowledge transfer, talent retention and global leadership. His achievements have been acknowledged and awarded by the prestigious Academy of Management and the IESE Alumni Organisation and he regularly features in the Financial Times, the Economist and Forbes, among others. At IESE, he acts as the Academic Director of the Management Development programme.

**Peggy Smith SCRP SGMS-T**

President and CEO  
**Worldwide ERC®**

Peggy is President and CEO for Worldwide ERC®, the organisation that empowers mobile people. She is a strategic leader with a keen eye for industry trends, fresh concepts and innovative solutions. Peggy has guest-lectured on talent mobility at Georgetown University and Seattle University, in addition to being a frequent keynoter and contributor at mobility and HR-related conferences. She is often quoted as a thought leader on forbes.com.

**Ernst Steltenpöhl**

Co-founder of the Expatriate Academy  
**Expatriate**

Ernst is co-founder of the Expatriate Academy and a member of its faculty since 2011. He has many years of experience in compensation and benefits (C&B) and is chairman of several platforms (C&B, job evaluation, international mobility) with top international companies as members. He was responsible for C&B at Heineken, Friesland Foods and Sara Lee International for many years, where he initiated and managed international C&B platforms and surveys (Netherlands, Europe, Africa and Middle East, Far East, Canada). Ernst studied in the Netherlands (Universities of Amsterdam and Tilburg), France (INSEAD) and the USA (Cornell University) in mechanical engineering and has a master's degree in sociology, management and organisation development.

**Janine Vos**

Member of the Managing Board and CHRO  
**Rabobank**

Janine started her professional career in 1997 as a legal counsel with KPN, a telecommunications and IT provider in the Netherlands. After fulfilling several business roles, she switched to HR in 2005 and became general manager HR in 2014. In 2016, she joined Rabobank and became CHRO in 2017. Owing to her explicit view on the future of work and clear conviction regarding the future of leadership—and her skills to convey these in a captivating and appealing way—she was named 'CHRO of the year 2017' in the Netherlands.

**Nicolai Wassman**

Head of Global Mobility  
**Ramboll**

Nicolai is senior Global Mobility leader, with more than 20 years' experience in international tax and workforce mobility gained from a variety of positions at Arthur Andersen, Deloitte and Ramboll. In 2018, he won the Forum for Expatriate Management's Global Mobility Professional of the Year EMMA award and the Global Mobility team of the year EMMA award. He often appears as a guest on panel discussions at mobility conferences around the world.

**Dr Yvonne McNulty**

Senior Lecturer, SR Nathan School of Human Development  
**Singapore University of Social Sciences**

Yvonne is a globally recognised expert on expatriates and international work, publishing over 100 academic articles, book chapters and conference papers. Her research has been featured in the New York Times, Wall Street Journal, Financial Times, and the Economist. She is currently senior lecturer, SR Nathan School of Human Development at the Singapore University of Social Sciences. In addition to serving as associate editor at the Journal of Global Mobility and the International Journal of Human Resource Management, Yvonne is co-author (with Chris Brewster) of 'Working internationally: expatriation, migration and other global work' (Edward Elgar, 2019) and co-editor (with Jan Selmer) of the 'Research handbook of expatriates' (Edward Elgar, 2017).

# TALENT 01



## Emerging international work arrangements

Global Mobility continues to be a vital tool for businesses to execute on their strategy. However, in 2019 we see a shift in the profile of the mobile population. With more employee initiated moves than ever, organisations must be flexible to meet not only the talent needs of the business, but also the motivations and expectations of that talent.

With four generations in the workforce, demographic diversity has challenged Global Mobility professionals to think differently, to redefine programmes into more nimble solutions, able to flex as needed.

Authored by

**Julia Palmer**

Group Head of Relocation  
and Assignment Management

**Santa Fe Relocation**



**Korn Ferry's 2018 study, 'Future of work: The global talent crunch'<sup>2</sup>, explores talent challenges in detail by geography and industry. They predict some staggering challenges—and opportunities. Here are some key headlines from their study to consider the impact on Global Mobility and HR teams.**

**As we reflect on the Global Mobility Survey 2019 analysis, consider this from Korn Ferry**

By 2030, demand for skilled workers will outstrip supply, resulting in a global talent shortage of more than 85.2 million people. Left unchecked, the financial impact of this talent shortage could reach \$8.452 trillion in unrealised annual revenue by 2030, equivalent to the combined GDP of Germany and Japan. The United States alone could miss out on \$1.748 trillion in revenue due to labour shortages, or roughly 6% of its entire economy. The problem, however, is the mismatch between technological advances, including automation, Artificial Intelligence (AI), and machine learning, and the skills and experience workers need to leverage these advanced tools. Technology cannot deliver the promised productivity gains if there are not enough human workers with the right skills. This has set the scene for a global talent crunch.

Korn Ferry Institute

Indeed, mobility demographics function as a pulse of change running through organisations as they redefine their purpose, their operational models and the new 'organisation deal'. The reality is that the expectations of the diverse global workforce will require new approaches to Global Mobility, where the home country becomes less relevant. International work arrangements will continue to see more fluidity in the drivers for mobility, with more employees taking control of their careers and lifestyle, electing to work, live and thrive in locations to suit their circumstances. Now more than ever, organisations are needing to flex their approach to mobility to attract, enable and retain talent.

Firstly, we need to embrace that the future of work is already here—data, due diligence, cyber security—they're already kicking in now. We have substantial talent requirements for both university and experienced hires and part of the challenge and opportunity is to reskill our people to equip them with the capability to be effective in operating and thriving in a new digital world.

The challenge with transformation is that while employees are busy dealing with 'now' work, they don't feel the urgency to focus on the development of new skills. Continuous change and learning require an energy and willingness to change. While Generations Y and Z have been brought up surrounded by technology as part of their lives, for the over 50s, without generalising too much, it is even more important to provide them with a sense of security and confidence that this transformation is achievable.

Over the next decade we need to provide an environment of happiness, and really 'love' and engage with our employees. Inclusion is key to ensuring that we recognise that, embrace different cultural perspectives and the perspectives of an increasingly diverse workforce with their own unique aspirations and expectations.

**Janine Vos**

Member of the Managing  
Board and CHRO  
Rabobank

For the first time, use of short-term assignments (70%) has overtaken strategic long-term assignments (63%) and business travellers (65%). Despite this, expected growth of strategic long-term assignments is higher than last year, when it was in fact negative. This may suggest that organisations have implemented increased use of segmented policies, allowing them to make better choices about assignment type, rather than moving away completely from strategic assignments.

There is no suggestion, or indeed evidence, that traditional expatriation will disappear for a variety of business and talent reasons. Increasingly however, organisations are focusing on tiered approaches to assignment/transfer support, with full strategic models, and on more creative ways to support fewer complex packages. Organisations and employees will increasingly recognise that given business ambiguity and rapid changes in technological advancement, it is difficult to plan or 'guarantee' a return to home country or headquarters. It is therefore likely there will be greater adoption of one-way relocations, which may result in a series of such moves being based on the employee's career trajectory and organisational requirements.

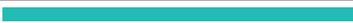
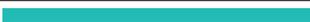
In one of our HR Director interviews on the results of an internal survey of 7,000 employees, it was highlighted that Generation Z employees (born from 1995 onwards) see their employer as an extension of their education, acting more like consumers seeking new skills and experiences. They decide when and if they want to undertake international work/life experiences. Generation Y employees (1980s to 1995) may be different again and see international exposure as key to their personal development and, more so than for Generation Z the ability to impact change in their organisations. Is this something you observe in your organisation? How do you support mobility opportunities for these different employees?

It is likely however, that organisations will want to provide their 'employable' talent with international opportunities earlier in their careers than previous generations to encourage engagement, development of thought leadership and to manage costs. As globalised activity becomes less exotic, it ceases to be the preserve of the most senior people. As organisations develop a consistent total reward strategy across their global footprint, it will become increasingly attractive for one-way company or employee-initiated relocations and more developmental transfers.

The World Bank<sup>3</sup> estimates that over 42% of the workforce is female (in most countries). There is still a way to go, but there are some positive indications that the mobile population is heading towards equality, with an increase of female assignees from 25% last year to 32% this year. This is important when we consider the targets in many organisations for female senior leadership, alongside global experience requirements.



**Fig. 1: Businesses undertaking assignment types over last 12 months (GM)**

Short-term assignments (less than one year)		70%
International business travellers (less than three months)		65%
Strategic long-term assignments (over one year)		63%
Developmental long-term assignments (over one year)		55%
One-way international relocations—Company initiated		48%
International commuting (maximum three years)		47%
One-way international relocations—Employee initiated		42%
Graduate programmes		34%

In **Fig. 1** we can see the changing profile of the mobile population has been evidenced over the past few years with the addition of new types of mobility policies, and the slow but steady increase in the use of short-term assignments, closing the gap with strategic long-term assignments. This year's survey shows that, for the first time, there has been a significant leap—short-term assignments are now by far more popular than strategic long-term assignments (70% versus 63%). We can draw a few possible assumptions from this, including insights from **Fig. 2**:

- + Over half of Business Leaders cite the most important driver for international assignments is to deliver international projects (53%). Shorter-term project-based assignees create a mobile talent pool allowing organisations to put the right skills where needed—and then move them when no longer necessary.
- + Using Global Mobility to develop high potential employees can be an expensive risk. Short-term assignments are an effective alternative to build global experience, thus motivating and retaining key talent, whilst managing costs.
- + The balance of power may be moving in favour of the employee—with more dual career couples than ever, organisations have struggled to attract employees to accept long-term assignments. Offering short-term assignments may facilitate deployment of specific skills, without needing to move the whole family and disrupt partner careers.

Further research into this area has been undertaken in the EY/NetExpat 2018 survey report.

In terms of Global Mobility, we have more use of short-term assignments (Missions: six weeks to two years—with an average of six months), where we deploy professionals to support the growth of local practices on projects or identified local needs. This provides us with agile solutions. It's also important to recognise that there are often cultural differences and part of the international experience is to enable our developing professionals to have exposure to different cultural perspectives at an early stage in their careers.

#### Senior HR Leader

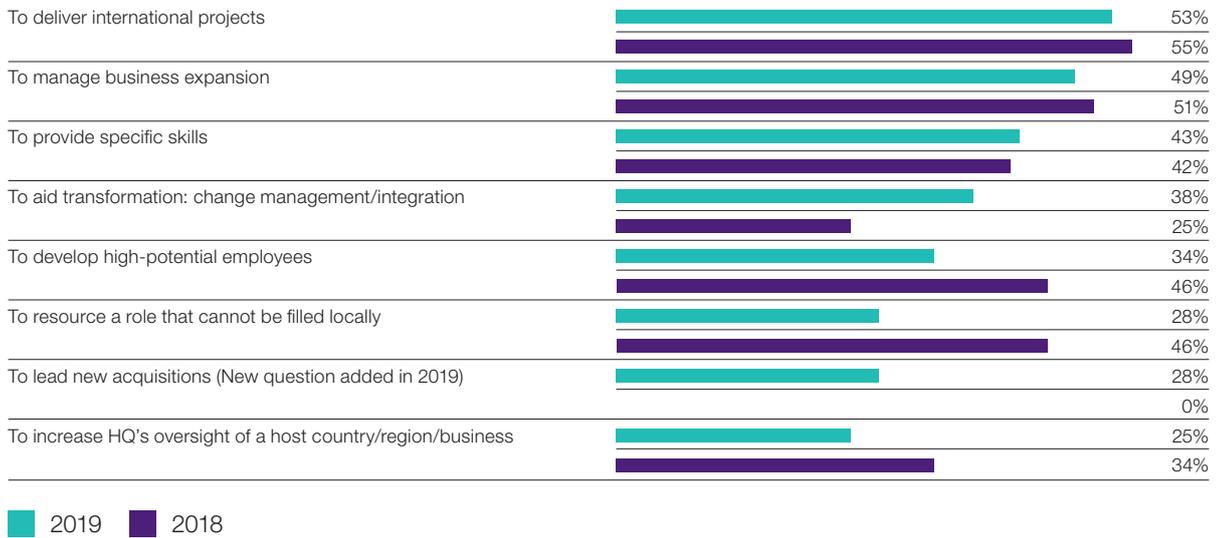
Business travel has also overtaken strategic long-term assignments. Encouragingly, this may be attributed to better reporting and responsibility of this population. Whilst the focus on business travellers and the associated compliance risks has improved, the longer-term impact on the health and well-being of employees should not be overlooked. Far from being glamorous, business travel can put significant stress on employees and their families. We may see more attention to duty of care for this mobile population in future mobility policies.

Unsurprisingly, Business Leaders' main drivers for mobilising talent are primarily to achieve business objectives. These key drivers are also consistent with Business Leaders' views last year, while aiding transformation—such as change management and integration—has become an increasingly important factor in 2019.

**Percentages:** For several questions, respondents were able to select multiple answers, therefore some totals exceed 100%.

**Figures:** GM = Global Mobility and BL = Business Leaders.

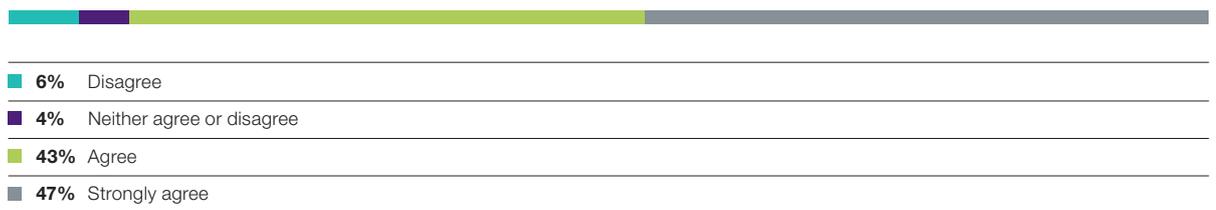
**Fig. 2: Key drivers for sending employees on international assignments—2018 versus 2019 (BL)**



However, in 2019 only a third of Business Leaders view international assignments for developing high-potential employees (34%) as one of the three most important drivers, down from nearly half (46%) in 2018.

**Fig. 3** highlights that Business Leaders do recognise the developmental value of mobility, with 90% of Business Leaders stating that Global Mobility leads to greater career progression.

**Fig. 3: Do employees who have undertaken international assignments achieve greater career progression? (BL)**



We evolve how we use international assignments. It's our ambition that it's no longer a case of deploying executives from headquarters for three to five years to direct and control local operations. We all want to work and collaborate through technology, in a socially connected world. For example, we can certainly leverage the capabilities and skills in the applied use of technology in Asia, and it's therefore a two-way sharing of knowledge.

We see an increase in executives and specialists undertaking periods of work internationally with their colleagues in host locations where they collaborate, share knowledge and build solutions which are the combination of collective ideas and perspectives. When you relocate to another country, you really must feel it's a local-to-local integration to ensure there is mutual value and respect.

It's not necessary to be a career expatriate for your whole career—but one certainly needs to have exposure to a period of international work arrangements as this will increasingly become essential to being considered for the most senior roles requiring inclusive global leadership.

**Janine Vos**

Member of the Managing Board and CHRO  
Rabobank

## International mobility exposure to develop future leaders

This falls into two categories in our business—medical/clinical professionals and our commercial/support functions. We do have strong talent management processes and the very nature of our business is international—perhaps in general, one could say that the medical professionals tend to be more focused on quality, vocational work more than executive leadership roles but we do have those who also wish to grow into more senior leadership roles.

We ensure therefore that they can undertake a variety of roles in different regions and cultures to equip them for senior leadership positions.

We constantly assess our talent pool to ensure it reflects the required people diversity to deliver appropriate solutions and technical and professional capabilities to reinforce our market position as a leading global brand.

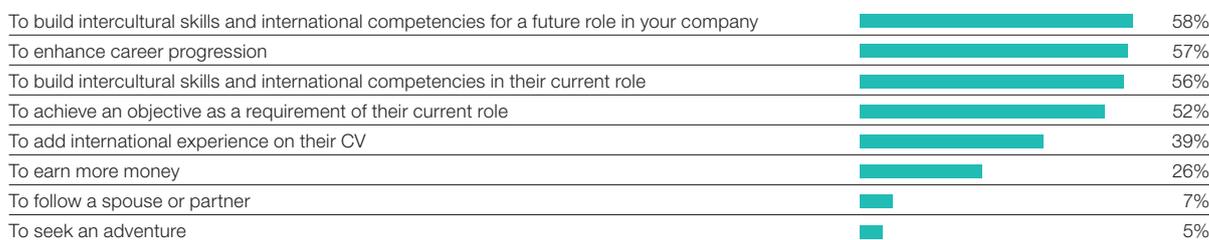
### Brian Horn

Group General Manager,  
International Assignee Services  
International SOS

Career progression may not be a top three primary business driver, but there is an opportunity for Global Mobility to work more closely with businesses to identify available talent from across the organisation who are seeking the career advancement that mobility can provide. Having visibility over a global talent pool of employees motivated to move can lead to more rapid deployment and, if it's a focus, lower cost assignments as the dialogue is more equalised between the business and the employee. In fact, according to Global Mobility respondents, employees are driven less by money, and more by the total career experience.

Fig. 4 shows that the top three key drivers for employees to go on international assignments have a personal and professional development theme in common, as staff look to global experience to help them succeed at work. Employees recognise development of intercultural skills, in the ever more integrated world, as being important in their current (56%) and potential future role (58%). Mobility is also a vehicle to enhance career progression in general (57%).

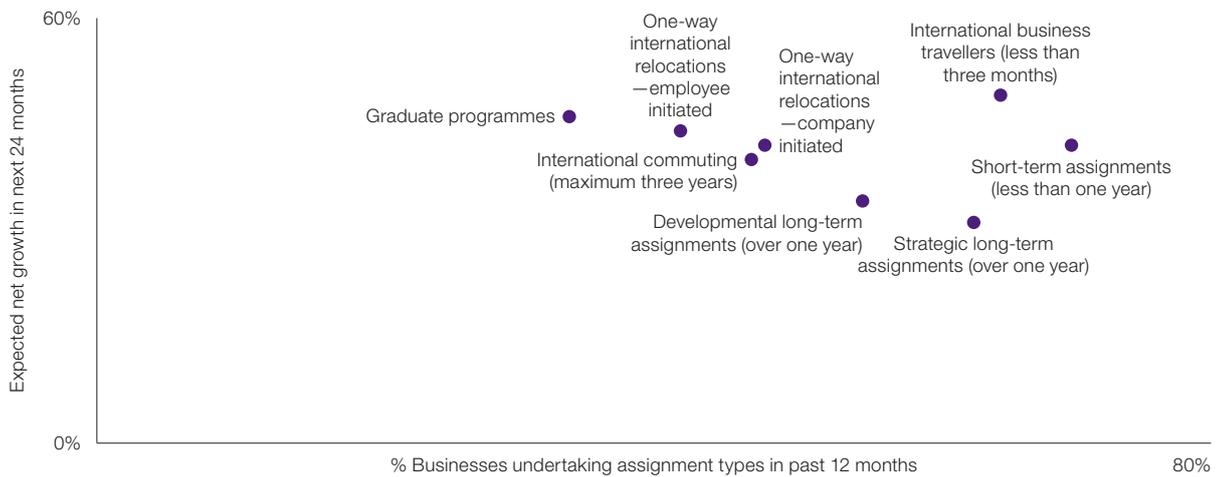
Fig. 4: Key drivers for employees undertaking international assignments (GM)



This suggests highly motivated employees are demanding global experiences as part of their overall employee value proposition. Increasingly employees expect education and personal growth to be at the heart of their employment arrangement, which Global Mobility can offer. Employees are becoming less willing to take on work abroad if it does not meet their needs—in the 'Risk' section, we will see how staff's reluctance to accept assignments is one of the biggest expected challenges to achieving Global Mobility objectives in the next two years.

With the combination of the strategic importance of mobility for business growth, and the increasing employee demand for global experience, substantial growth in mobility over the next two years is expected. Global Mobility professionals expect a net growth of between 31% and 49% across all assignment types.

**Fig. 5: Businesses undertaking assignment types over last 12 months and expected growth in each type of assignment for next 24 months (GM)**



**Fig. 5** reflects that the highest level of growth is predicted in international business traveller assignments lasting less than three months (49% net growth). Moreover, while one-way international relocations and graduate programmes are undertaken less frequently, relative to this they are expected to see a substantial increase (42-46% net growth) in the next 24 months.

This trend towards one-way permanent transfers, both company and employee initiated, could be more aligned with the preferences of Millennial and Generation Z employees than traditional assignments. These generations are known to be more likely to seek new experiences abroad and less likely to want to stay tied to one country. Organisations that are agile and flexible enough to facilitate this will have a competitive advantage in attracting this future talent.

The role of traditional long-term assignments is transforming; with the change of pace in technology and innovation, the skills required are a constant balancing act between engaging existing employees and sourcing new talent with the latest skills. The concepts of stable and agile are especially applicable.

Reflecting our organisational requirements, we have phased out the use of long-term assignments to almost zero. The challenges based on the rapid change in technology mean that the roles and expectations of returning long-term assignment employees no longer reflect the business investment required.

International experience should occur earlier in employees' development and for a shorter period, of say up to a year, supporting the relocation process but placing employees on a local contract and compensation package. There is a cadre of younger talent for whom it is easier to identify roles for on return from these shorter international experiences. This provides a new balance: cost and development that reflect the organisation's talent capability requirements and ensures that international assignments drive organisational competitiveness in a more manageable way.

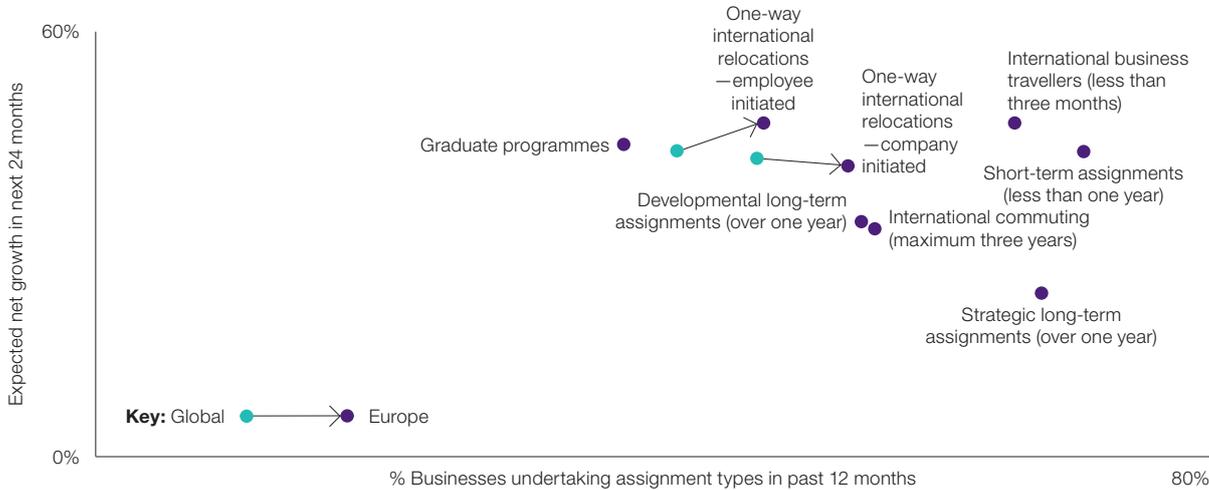
Ecosystems of knowledge, workers and organisations need to be leveraged, especially through social media, to attract and 'suck in' talent. Traditional hiring channels are being impacted by new digital platforms that attract the talent that the organisation is seeking to attract.

Senior HR Leader

One-way permanent transfers also indicate that organisations are becoming more truly global, rather than multi-national. Employers are looking at where talent is needed, and applying the mobility approach based on the nature and purpose of the role—is the role permanent or temporary? Who are the potential internal candidates ready and willing to apply for the role? Will that person go back to their point of origin at the end, or go elsewhere? Roles now don't need to necessarily be filled with expensive temporary assignees, selected by the business—rather a longer-term, less paternalistic recruitment approach is being applied.

Europe in particular is showing clear signs of embracing more one-way permanent transfers.

**Fig. 6: Businesses undertaking assignment types over last 12 months and expected growth in each type of assignment for next 24 months (GM Europe)**



In **Fig. 6** nearly half (48%) of businesses in Europe had employee-initiated one-way relocations in the past year and expect strong growth of these in the next 24 months. Also, over half (54%) of European businesses utilised company initiated one-way relocations last year compared to 48% globally.

Some of the European trend for one-way relocations could be accounted for by the impact of Brexit but increasingly it is a recognition, as we described in the introduction to this section, that for both organisational cost and employee talent reasons, one-way transfers enable more flexibility than work arrangements that could involve a chain of succession planning moves. As markets change and technology unlocks both new potential and opportunities to re-design workflows, this approach, can provide optimal resourcing solutions.

Furthermore, increased free movement within Europe since EU expansion in 2004 means that many more employees have taken employment in countries other than their country of origin. When they go on an assignment, their link to the sending country is much weaker, hence a preference for a one-way move rather than being tied to being repatriated to somewhere which is not 'home'.

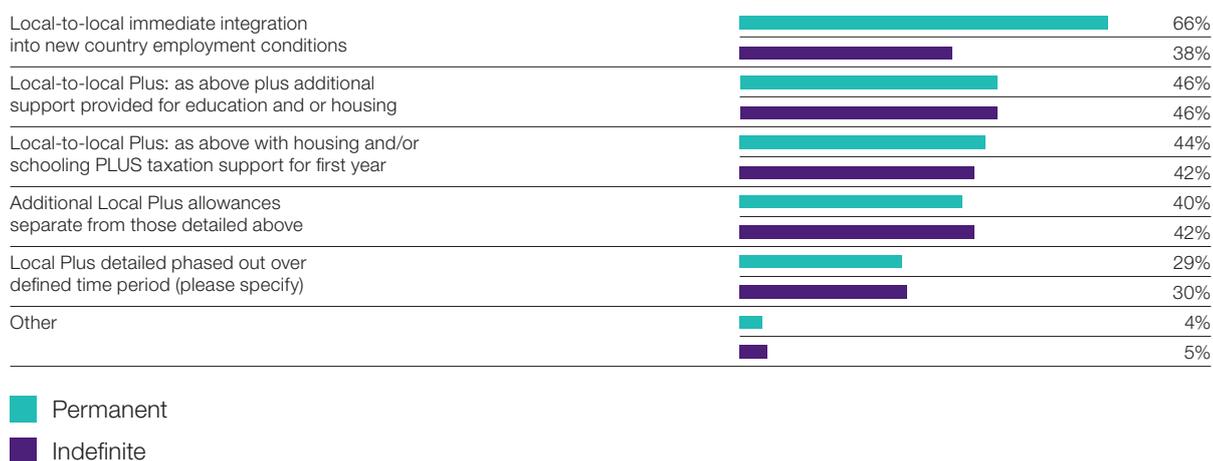
In **Fig. 7** indicatively, organisations with one-way relocations still have the final decision on whether employees will relocate again or return (67%). This scenario is also more likely than a one-way 'permanent' move being the final relocation for that employee (58%). This seems to align with the assumption that organisations are moving towards a more global approach to sourcing and deploying talent from and to where the roles are.

**Fig. 7: How assignments are categorised when assigning an internationally mobile employee on a one-way relocation (GM)**

It may be followed by another one-way international relocation or return to original home location, as directed by the company	67%
It is intended to be permanent with no expectation of further relocation(s)	58%
It may be followed by another one-way international relocation or return to original home location, as directed by the employee	42%

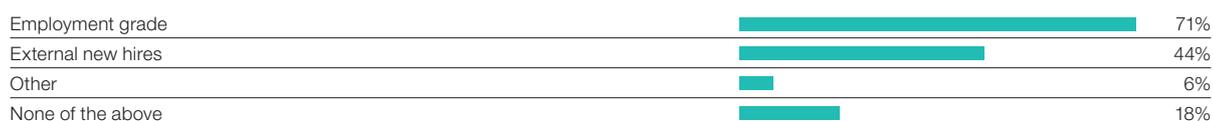
In **Fig. 8** we see that for truly 'permanent' relocations, the standard approach is for businesses to provide 'local-to-local' conditions for immediate integration (66%), without added benefits such as support in housing, education or taxation. This suggests that one-way relocations may also be being utilised to reduce costs in comparison to other assignments where more needs to be provided for the assignee.

**Fig. 8: Employment conditions provided to employees relocating one-way (GM)**



In **Fig. 9** work seniority (71%) has the biggest impact on determining the employment conditions provided to employees relocating one-way, rather than whether the assignees are external new hires (44%). External new hires are being brought in from a competitive marketplace, putting more negotiating power into the hands of the potential employee. Where salary bands may not be able to be tested, demands may be made on the Global Mobility programme to provide some enticements to accept the role. This group may also be coming from a current international assignment in the same location with housing and the like being provided. This creates a need for talent, reward and mobility to be aligned and working together to support strategic talent sourcing.

**Fig. 9: How employment conditions provided to employees relocating one-way vary (GM)**



Similarly, to what we saw earlier, in **Fig. 10** the increased use of short-term assignments (41%) and international business travellers (39%) remains the most widely expected change for Global Mobility in the next two years overall.

**Fig. 10: Changes expected amongst internationally mobile workforces over the next 24 months (GM)**



While it is encouraging to see that Global Mobility professionals also expect more cultural (36%) and gender diversity (31%)—each up from 24% in last year's survey—there is still some tension between the diversity profile of the current mobile population and future business needs.

One diversity metric many countries require organisations to report on and be accountable to is gender diversity. Female representation at executive and board levels is increasingly in the regulatory spotlight, with shareholders expecting organisations to address the imbalance. We have looked at Business Leaders' key drivers for mobility, which were focused on achieving specific business outcomes.

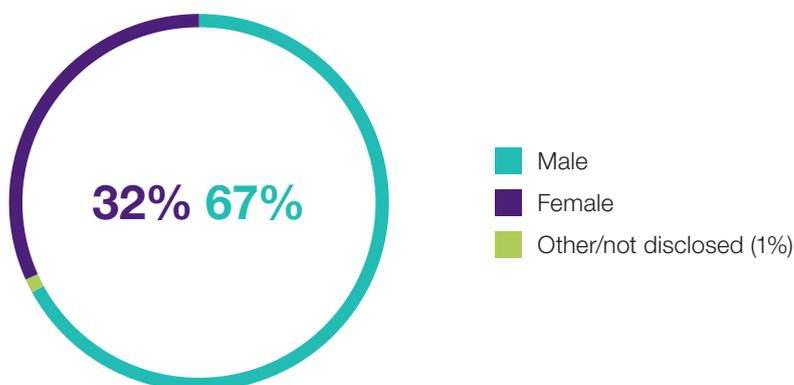
We also saw that Global Mobility is seen as beneficial to career enhancement. In **Fig. 11** when asked about the importance of global experience for board and executive leadership, 67% of Global Mobility professionals report that it is mandatory or desirable for success. With targets of 50% representation at senior levels, and the need for global experience, these figures need to be reflected in the mobile population.

**Fig. 11: Talent strategy for using international assignments (GM)**

Mandatory for executive board		11%
Mandatory for executive board and senior leaders (business and function heads)		26%
Desirable for executive board		9%
Desirable for executive board and senior leaders (business and function heads)		21%
Desirable for all talent who achieve a defined performance level		28%
Not that important		5%
Not important at all		1%

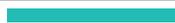
This highlights a further need for talent and mobility to be working closely together, to ensure the right gender mix is being given global opportunities, able to build the leadership pipeline. There is evidence of improvement, with increased female mobile employees reported this year (32%, compared to 25% in 2018). Establishing processes to address potential unconscious bias in the selection of mobile talent will go some way to addressing this challenge.

**Fig. 12: Percentage of international assignees who are male and female (GM)**



In **Fig. 13** we focus on the most common assignment destinations and sending locations. The USA remains the most frequent expected assignment destination for businesses over the next 12 months and is the most common destination for one in five (19%) businesses. Although slightly less common than last year, China remains the second most popular destination. The UK has slipped from the third most common destination last year, to the fifth in 2019—perhaps an indication of the uncertainty around Brexit. The rise of protectionism is making mobility into the USA and other countries more challenging for some nationalities. In order to continue to meet business needs and to have the right talent in the right roles, organisations need to have a mobile talent pool that includes people who are not only willing, but also able to move to certain countries.

**Fig. 13: Most common assignment destinations and sending locations (GM)**

US		19%
		15%
China		9%
		9%
Germany		7%
		6%
UK		6%
		8%
France		6%
		9%

 Destinations  
 Sending locations

This year's top five sending locations are the same as the top five destinations—suggesting that businesses are primarily sending and receiving employees across the same countries, rather than branching out to new locations. The USA has become the primary expected sending location this year, replacing the UK, which is now the fourth most likely sending location.

<b>Destinations (% most common)</b>	<b>2018</b>	<b>2019</b>
USA	14%	19%
China	13%	9%
Germany	6%	7%
France	5%	6%
UK	8%	6%

<b>Sending from (% most sent from)</b>	<b>2018</b>	<b>2019</b>
USA	10%	15%
China	8%	9%
France	10%	9%
UK	11%	8%
Germany	7%	6%



# REFLECTIONS<sup>01</sup>

## **Selina Jones-May**

Whilst I agree that there is an overall industry trend towards more short-term assignments, business travel and one-way transfers, I think the longer-term outlook will differ according to the industry a company operates within and the key drivers within that organisation for running the mobility programme. For example, in FMCG there would be predominantly non-chargeable assignments utilised to support personal development and the growth of senior leadership, so the individual will have more flexibility to submit personal requests to mobilise and the terms upon which they are willing to move.

Within the engineering and construction industry that Worley operates, over 90% of assignments are project driven (skills deployment) and fully chargeable to our clients. Individuals will typically be on rotational long-term assignments to remote locations and be required to accept a specific set of project terms and conditions. Against the norms of the broader mobility industry, we are expecting our next policy review to culminate in a predominant return to a home based (tax equalised) approach for all of our projects, which in recent years has only been selected for our major projects. The anticipated shift away from Host Plus packages would be driven by external industry factors, namely the recovery of the oil price causing a war for talent and a consequent demand for more competitive packages.

## **Phil Renshaw**

My research shows that organisations have consistently failed to realise that there are effectively two employers involved in a mobility decision—the home and the host. The traditional focus on the home, especially where it is also the headquarters, has led to a misunderstanding of both what value is generated through an international assignment as well as which part of the organisation has greatest influence over it. As the increase in employees taking control over their own careers and initiating the mobility decision grows, so this magnifies the potentially weakening role of the home/headquarters. Hence organisations, especially central talent and Global Mobility functions, need to place an ever-increasing focus on assessing the value they expect from a move as well as how they are going to capture that value.

## **Prof. B. Sebastian Reiche**

This year's report shows an ongoing trend of an increasing fragmentation and diversification of the pool of global professionals. However, it also points to the urgent need for more integration across talent and Global Mobility functions. We are rapidly moving towards a talent landscape in which Global Mobility is but one singular career event in a sequence of repeated global career moves. As any marketer already knows, this requires a more explicit consideration of the entire employee experience and employee journey from a Global Mobility perspective. Indeed, to be able to provide adequate career paths for global professionals and actively prepare successors for global assignments (of whatever sort) it is important to strategically and integratively plan the entire workforce rather than viewing Global Mobility as detached.

## **Peggy Smith**

### **Agile perspectives, creative partnerships and smart strategies**

The convergence of advanced technology facilitating global assignments, remote work and virtual teams; increased geopolitical uncertainty; evolving employee preferences; widespread talent shortages and a progressively increasing contingent workforce are changing the game for companies and workers alike. In this steady march toward the future of work, those building and managing their global teams must maintain a fluid, agile perspective, partnering inside and outside the organisation with other mobility-related leaders to develop the most intelligent and effective workforce strategies.

## **Nicolai Wassmann**

It is positive to see that previous expectations of increasing numbers of female assignees has happened with an increase from 25% to 32% (of the total population). It indicates that Diversity and Inclusion (D&I) initiatives are working better than ever. A combination of expectation of increased use of short-term assignments and international business travellers—which may be more flexible to align to career wishes and drivers to undertake an international role—with the expectation of an increase in employee initiated programmes, these factors may support further development in gender diversity.

### **Ernst Steltenpöhl**

I found the most challenging destinations of interest, as it suggests a traditional expatriate process i.e. assignments between headquarters and host/local organisations. I think the big change lies in the fact that multinationals are increasingly sending employees between local organisations (e.g. local-to-local movements such as Mexico to Nigeria, rather than on a headquarters axis.). In the Netherlands, for example, we see that the ‘traditional’ expatriate policies (based on headquarters) are being replaced by more segmented Global Mobility policies—policies balancing between global consistency, local situations and requirements. No longer: ‘one size (headquarters) fits’ all but smart tailor made.

In terms of the benefits of international assignments for career progression, while there is a positive expectation of this and it is often the main driver for undertaking an assignment, is the real benefit really stacked in favour of the employee rather than the employer? With increasingly rapid developments across all industries on a technical and technological level, we often see the realized benefits for greater career progression taking shape at another organisation, as capable talent becomes more focused on their own portfolio career and increasingly less on loyalty to the organisation.

### **Dr. Yvonne McNulty**

#### **Reference to growth of short-term assignments overtaking long-term assignments**

We have seen this trend in academic research for at least the past decade. There will always be reasons why companies need strategic long-term assignments, the purpose of such assignments (corporate governance being a very important one) being a key driver. As we see here, the numbers of such assignments are decreasing, a trend that should continue for at least the next decade. These are expensive assignments, usually staffed with senior people who are highly paid. I predict in the next 20 years that this number will decrease to below 50% of total assignments, if not lower again. The strong shift to short-term assignments and international business travel is a reflection of the times: middle managers with families are an increasing segment of the international talent pool necessitating more ‘flexible’ mobility options to enable them (men and women) to juggle family and home responsibilities. The key question is—are they cheaper assignments? Additionally, can these shorter international work experiences one day replace the need for strategic long-term assignments, at least in some parts of the world, particularly with the advent of AI (Artificial Intelligence) and technology that can monitor corporate governance from afar?

Early mobility experiences are key to delivering on the employee value proposition. While it is not said, ‘Retention’ is a key driver for early mobility experiences.

#### **Reference to businesses undertaking assignment types over last 12 months**

Focusing on: one-way international relocations—company initiated and employee initiated. I predict this will be one of the most common moves in ten years’ time. This should be tracked by region as the immigration situations of Asia and Europe make one-way moves extremely do-able versus other regions (e.g. Americas, Middle East, Africa). Latent immigration motives on the part of the employees will also play a significant role in driving up the number of employee initiated one-way moves, a key consideration will be to ensure that the move also benefits the company as much as it benefits the employee.

#### **Reference to dual careers**

All the research that I and colleagues are doing shows that this is accurate—more couples are opting into split family arrangements where one spouse stays behind. This is either for a short-term or commuter assignment and sometimes even for a long-term assignment.

#### **Reference to duty of care**

Duty of care for employees’ well-being will replace duty of care for compliance in the coming years. We are starting to see a clear focus in academia about duty of care related to terrorism, dangerous locations, LGBT expatriate situations, and expatriates in crisis, especially crises that are man-made. The latter has been suggested to arise from severe levels of expatriate maladjustment, some of which can be related to excessive international business travel during expatriation.

# TRANSFORM <sup>02</sup>



## Reimagining the Global Mobility profession

We have seen in section one, 'Talent', that traditional mobility patterns continue to fragment towards a more fluid, less predictable deployment of mobile employees. Furthermore, it is no longer the organisation that remains fully in control of domestic and international mobility, as increasingly, more employees take control of their own careers, which is likely to include self-initiated international work/life experiences.

The 'organisational deal' is also evolving, and the mantra now is employability, capability and competitiveness, against a continuing landscape of uncertainty, rapid technological advancement and new markets and opportunities. To attract and engage scarce talent, organisations must now adopt a more holistic approach to engaging with existing and potential talent to offer attractive total employee experiences that reflect what employees want, when they want it, and adapt policies, processes and rules to reflect a different period of economic stability and generational expectations.

Authored by

**John Rason**

Group Head of Consulting

**Santa Fe Relocation**



**So, where does this leave Global Mobility professionals functioning in an industry that is transforming so rapidly? It is often difficult to determine, and importantly to deliver on, multiple priorities. “If everything is urgent, then nothing is urgent”, so the saying goes.**

**Global Mobility professionals have a complex role set to navigate:**

- + Talent
- + Reward and benefits
- + Compliance
- + Advisory—executive management and employees
- + Employee experience (domestic HR teams are unlikely to have the same contact with their employees’ family)
- + Supply-chain management
- + Data analytics
- + Policy compliance/development
- + Liaison with external government authorities

Reporting lines for Global Mobility professionals/teams have traditionally been into reward and while this is still the case for many organisations, the makeup of Global Mobility functions is coming under scrutiny.

As an example, should Global Mobility teams be re-engineered, with talent and reward activities shifting into Centres of Expertise/Excellence (CoEs), and administrative elements moving to HR shared services, or indeed being outsourced?

They are no right and wrong answers and each option needs careful due diligence and objective evaluation. There is no doubt, based on the Business Leaders’ findings, that Global Mobility’s contribution is valued but could be even greater.

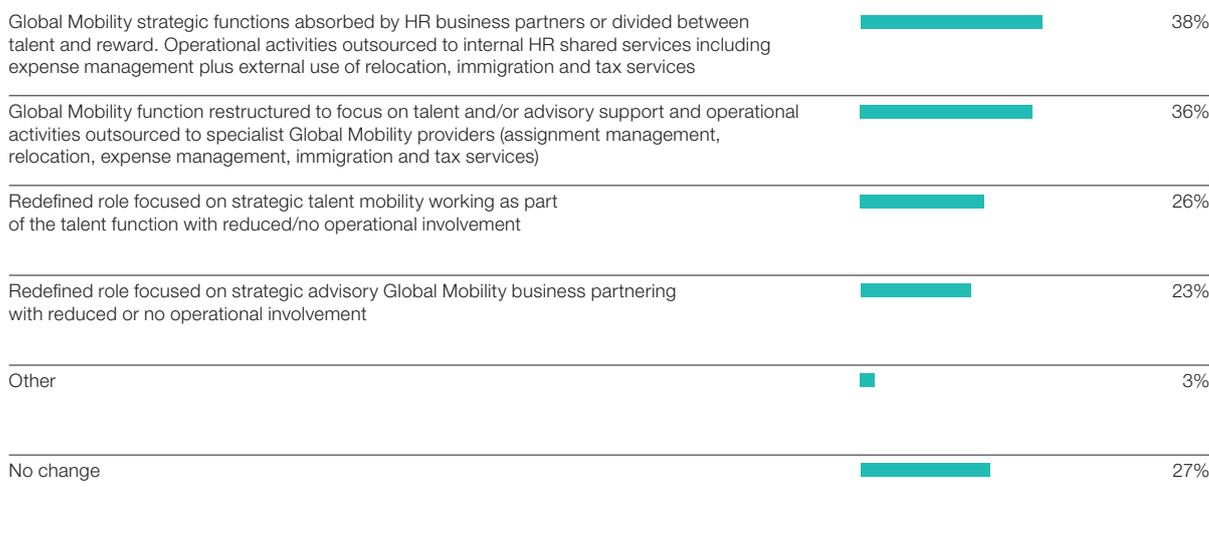
It is not a question of ‘having a seat at the top table’ as is often described in articles. The real value of Global Mobility input is in being included by executive management early in planning processes, and Global Mobility views being valued and supported by data, analysis and qualitative assessment. Making an investment decision in a new location, acquisition or international project can be enormously costly if key talent, compliance or geopolitical factors lack rigorous due diligence.

In line with the 2018 survey findings, there are consistent trends and themes for Global Mobility professionals to explore with their Business Leaders to determine how best to create value over the coming years of exciting change.

**In the interviews it was clear that the role of HR leaders has changed. Ten years ago, it used to be more focused on process management, capabilities and M&A. Fast forward to 2019, it’s closer to 40% talent, 40% consulting with leadership and 20% traditional HR work. They now collaborate as teams who bring together their specialisms and expertise and it’s no longer about operating in functional silos.**

**Senior HR Leader**

**Fig. 14: How Global Mobility team structure will evolve over the next 24 months (GM)**





The day-to-day role of Global Mobility professionals is likely to evolve in the coming years, to allow for a closer focus on talent by shifting the responsibility for operational 'hygiene' activities. Nearly three quarters (73%) expect their Global Mobility team structure to transform in some capacity.

This has significant implications for Global Mobility—which could see some organisations deconstruct current structures to better align with their business and talent priorities. Many Global Mobility teams are likely to remain one group but should perhaps take a deep-dive look at their priorities and value-based activities.

Similarly, no one would challenge the value of operational excellence (in assignment support) as a prime goal of Global Mobility teams, but the real question is whether this is best delivered internally, externally or through some other flexible arrangements.

Whether this is re-imagining or re-imaging Global Mobility's contribution, each organisation will decide on their focus and priorities. Defining purpose and alignment with the emerging international workforce arrangements that were explored in section one of the report is mission critical.

Attracting, engaging and retaining employable talent is one of the most important priorities for organisations, and Global Mobility teams need to establish their place in their organisation's process.

**Fig. 15** provides a regional perspective from North America, where the trends shown in **Fig. 14** are even more accentuated. North American Global Mobility professionals appear to be even more radical in their views on the extent of the Global Mobility transformation. There is a significant intention to separate hygiene (operational interventions) and strategic remits, by focusing on working in broader teams where there is an opportunity to be more engaged in strategic, forward-looking decisions on talent deployment, reward and policies that will address a diverse workforce's expectations in a consistent way.

**Fig. 15: How Global Mobility team structure will evolve over the next 24 months (GM North America)**





**Fig. 16** does highlight some interesting changes from the same findings in the 2018 survey and there has been positive progress made by Global Mobility teams in re-shaping roles to focus less on compliance related activities and more on what Business Leaders value.

Currently, as well as providing advisory services to employees, HR business peers and line management (38%), it is compliance demands—tax (35%) and immigration (34%)—that are taking up the most time for Global Mobility professionals.

#### **As a global HR organisation, we are focusing on three key things**

**Global mindset**—ensuring that we engage our colleagues in a way that means they feel included from their perspective and not from a one country, headquartered perspective. This is critical for the design and delivery of people products and services.

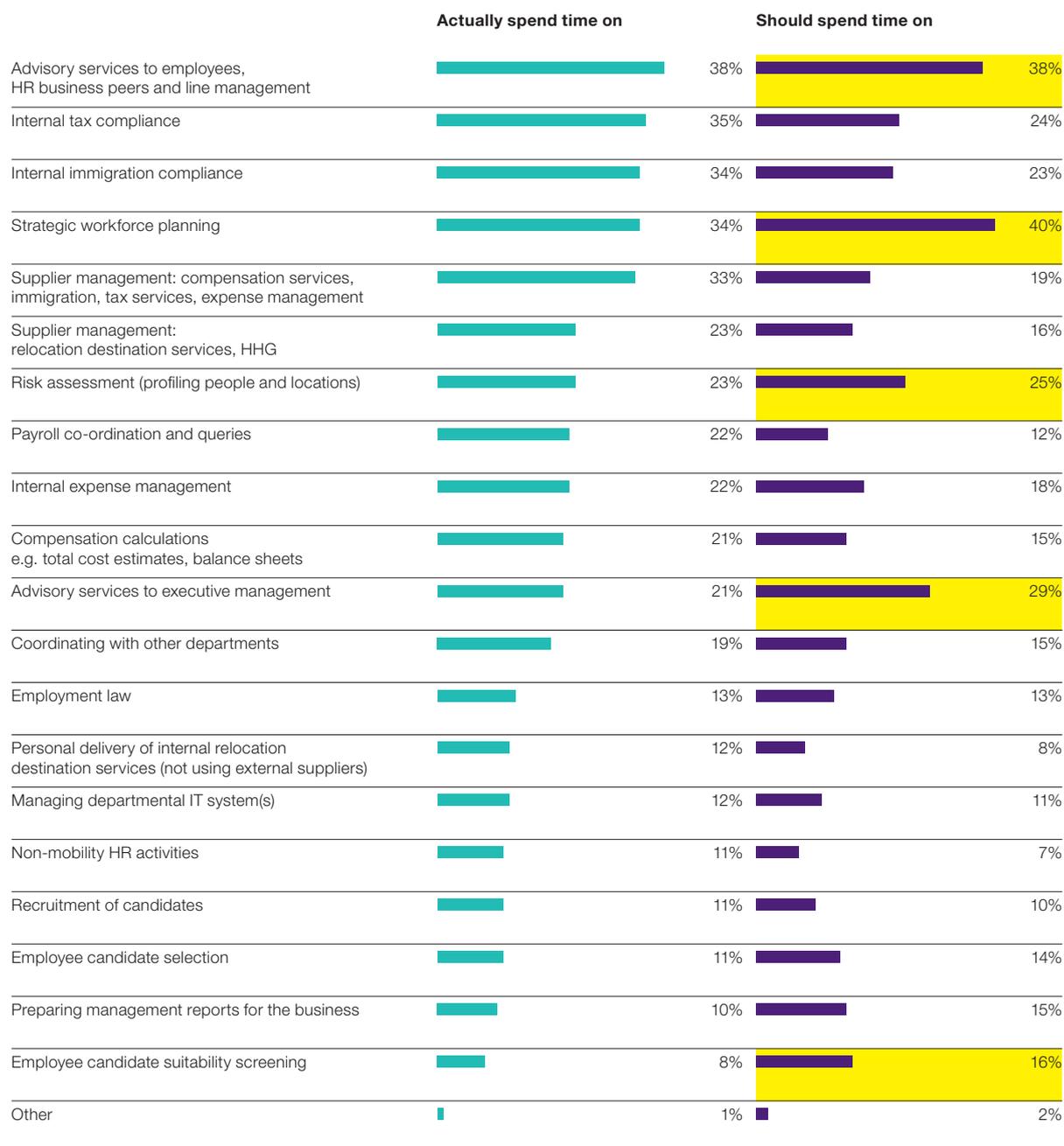
**How we work**—we have redesigned the way we work. We have broken out of silos to focus on our end to end processes, to ensure we have a more total engagement approach with our employees. From last September we started the redesign of how we work and launched it in January 2019. We have been developing working in ‘squads and tribes’, bringing together people who have different skills and experience to the team, rather than focusing on their function or business line role.

**Transformation**—as we transform our skill base, we are focusing on data; what does it show, how are we working with data and analytics to assess and provide insights on our future workforce capability requirements?

#### **Janine Vos**

Member of the Managing  
Board and CHRO  
Rabobank

**Fig. 16: Where Global Mobility spend most time versus should be spending their time (GM)**



**How will data analytics, technology and self-service solutions play into the mix?**

As Global Mobility programmes move away from traditional international work arrangements and talent sources become truly global, expectations of a more personalised, technologically enabled relocation experience will be an important factor in the competition arena for scarce people resources.

Reflecting on the findings of the Korn Ferry 2018 study, ‘Future of work: The global talent crunch’, it is predictable that both Global Mobility and Business Leaders in **Figs. 16, 17** and **18** identify the following:

1. Strategic workforce planning, advisory services to all internal stakeholders; business leadership and to employees/HR and other teams and last but not least, candidate selection.
2. It would be a logical assumption that, with such a broad remit in Global Mobility, most professionals would no doubt welcome the chance to spend less time on tactical or transactional tasks, to free up time for more future-focused strategic and advisory activities.

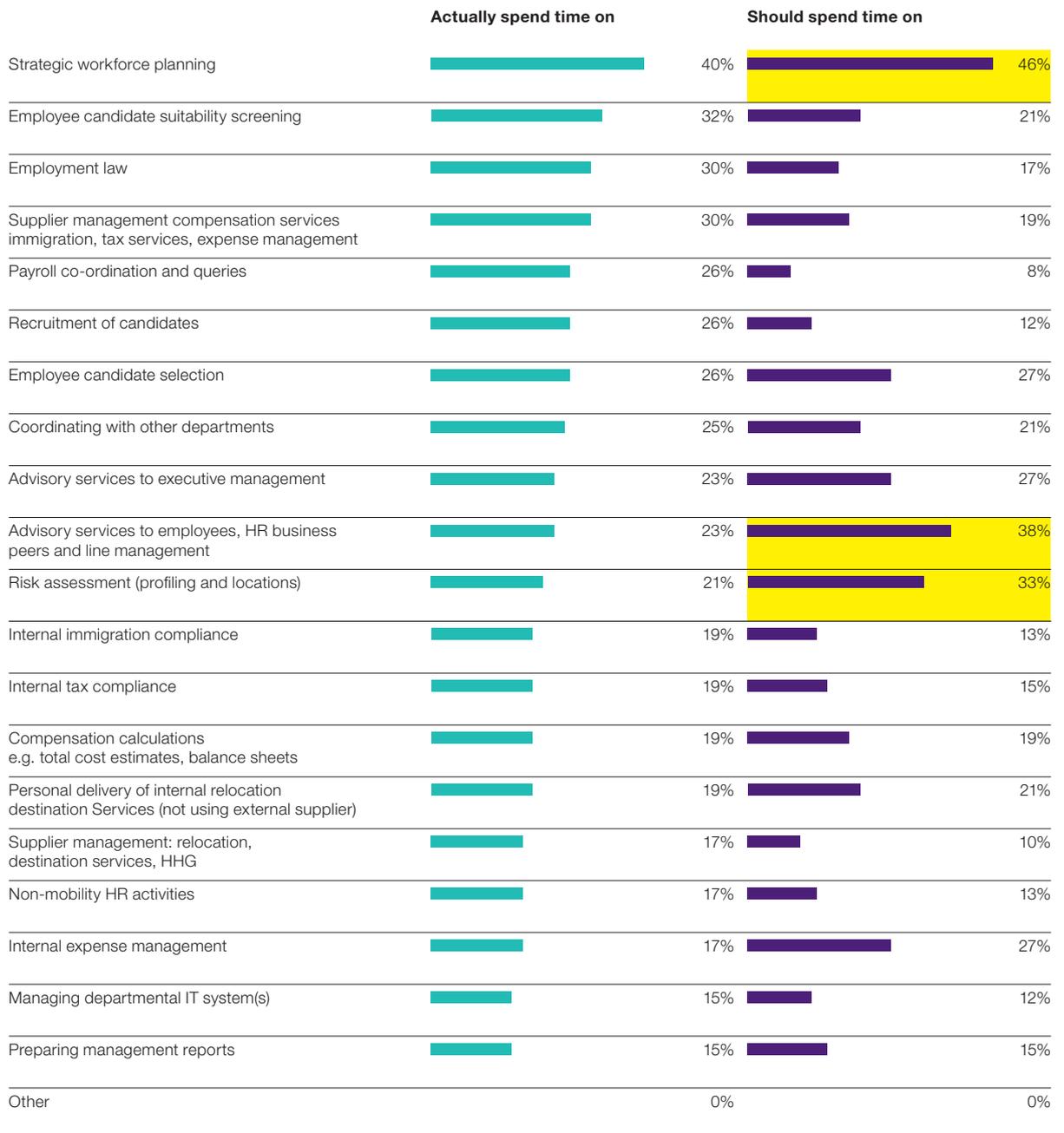
**Fig. 17: Where Global Mobility spend most time versus should spend their time—professional services (GM)**



**Fig. 17** Professional services provides an industry specific perspective of Global Mobility roles to see if this correlates with the global generic view. Strategic workforce planning (48%), advisory services to executive management (31%) and employee candidate suitability screening (21%) are stand-out activities. Perhaps with higher focus, more of the time spent on internal expense management (24%) needs to be invoiced to clients as part of timely billing. It is clear that there is an intention across the Global Mobility function to be engaged in less compliance related work. Professional services such as technology are often more focused on client-based projects and while traditional strategic assignments still form part of their programmes, the real focus is ensuring there is strong governance over risk management, enabling the right people to be deployed and working with Business Leaders and partnership leaders on establishing a balance between focusing on today and planning for tomorrow. Strategic workforce planning alongside more advisory services continues to be the key areas where Global Mobility teams feel they should be spending a significant portion of their time—nevertheless, it is encouraging to see that these activities are already a high priority.

Here is the challenge: Global Mobility teams would need to be involved with all talent decisions in order to be able to see how the internationally mobile employee population complements the non-internationally mobile population. As the internationally mobile employee population is a relatively small sub-set of the broader population, it is very difficult to make mobile workforce planning effective and meaningful, as Global Mobility teams are currently operating with only a sub-set of understanding of the entire workforce map. Some organisations have made progress by having a member of the Global Mobility teams (regional) embedded into the talent function. This does, however, require time investment and building trust and engagement to make it work.

**Fig. 18: Business Leaders' view of where Global Mobility spend most time and should spend most time (BL)**



Business Leaders say that the key area their Global Mobility team should be spending time is on strategic workforce planning (46%). However, they are starting from the impression that this is the primary use of their Global Mobility management team's time (40%).

Global Mobility teams have a clear mandate to make the case for time investment in contributing to the strategic workforce planning agenda—which can only be defined at organisation level and not as generic positioning. Of course, this is unlikely to be fully realised if the expectation is to exclusively focus on compliance and deferring change by continuous reactive behaviour in partnering with the business.

Advisory services are also highlighted as an important focus area. Interestingly, 38% of Business Leaders think this should be a priority for the management team—and as we saw earlier, 38% of Global Mobility professionals say it already is. This implies therefore, that Global Mobility teams may need to improve the visibility of their advisory role, and champion their input, to help demonstrate the value they are already providing. Other areas of opportunity include advisory services to executive management (27%)—another view common to Global Mobility professionals—and risk assessment (33%).

This drive to provide a more strategic offering links in with the increasing need for Global Mobility teams to demonstrate overall value of their function to the wider business. **Figs. 19** and **20** reinforce the different perspectives of Global Mobility professionals and the leadership that they support.

There is common alignment on the increasing complexities of compliance and increasing cultural and gender diversity of the global workforce, requiring differential but consistent treatment in the form of policies and engagement to make them feel engaged and motivated to work for an organisation.

The real difference, however, is Global Mobility professionals' focus on transformation and yet even here, Business Leaders identify that AI (Artificial Intelligence) will have a significant impact on the way that Global Mobility teams effect this (42% Business Leaders vs 20% Global Mobility professionals). This suggests that Global Mobility teams must consider all options around effective and successful transformation, including the impact of AI—even if it threatens their personal roles—because if they don't, their Business Leaders will do so for them.

**Fig. 19: Global Mobility view of interventions and trends having a significant impact on Global Mobility function over the next 24 months (GM)**

Increasing compliance complexities: tax, employment or immigration	34%
Transformation of Global Mobility team roles and responsibilities	31%
More cultural diversity e.g. greater multi-cultural resourcing	26%
Increasing geopolitical risks e.g. war, terrorism, nationalism	23%
Retention risk of internationally mobile employees	23%
Global Mobility teams/function fragmented into talent, shared services etc.	22%
Increased employer responsibility to prepare internationally mobile staff	20%
Increased use of AI (Artificial Intelligence) to enhance the employee experience	20%
Consolidation (reduced numbers) of Global Mobility suppliers	19%
More gender diversity e.g. more women	19%
Internal centralisation of the Global Mobility function	17%
Internal de-centralisation of the Global Mobility function	17%
Increased reliance on external supply-chain for services including compensation	16%
Increased reliance on external supply-chain for services (non-compensation)	16%
Increasing use of freelancers	16%
Supply-chain disruptors with non-traditional, digital solutions	15%
Decreased reliance on supply-chain for services including compensation	10%
Decreased reliance on supply-chain for non-compensation services	10%
None of the above	8%



**Fig. 20: Interventions and trends impacting Global Mobility function over the next 24 months (BL)**



**Fig. 21** reflects the focus on enabling organisations to better understand and optimise their people resource investment but with only a third (35%) of Global Mobility teams currently providing this reporting to the business, the findings suggest significant opportunity to deliver more input into the strategic workforce planning process, as highlighted in **Figs. 18, 21** and **22**.

Additionally, another metric which is vital for showing the value of assignments—Return On Investment (ROI) achieved on completed assignments (22%)—is also being relatively overlooked. This fits a wider pattern in terms of the data that Global Mobility teams are currently providing to the wider business.

Tracking the long-term career success of repatriated/serial assignees (31%) is a step in the right direction towards better collaboration with HR, talent and Business Leaders. While not providing a seat at the ‘top table’ it does support inclusion in ‘slots’ at executive meetings, as Global Mobility professionals utilise more facts, analysis and opinion about the measures that matter in their internationally mobile workforce.

**Fig. 21: Methods used to demonstrate Global Mobility’s value to wider business (GM)**

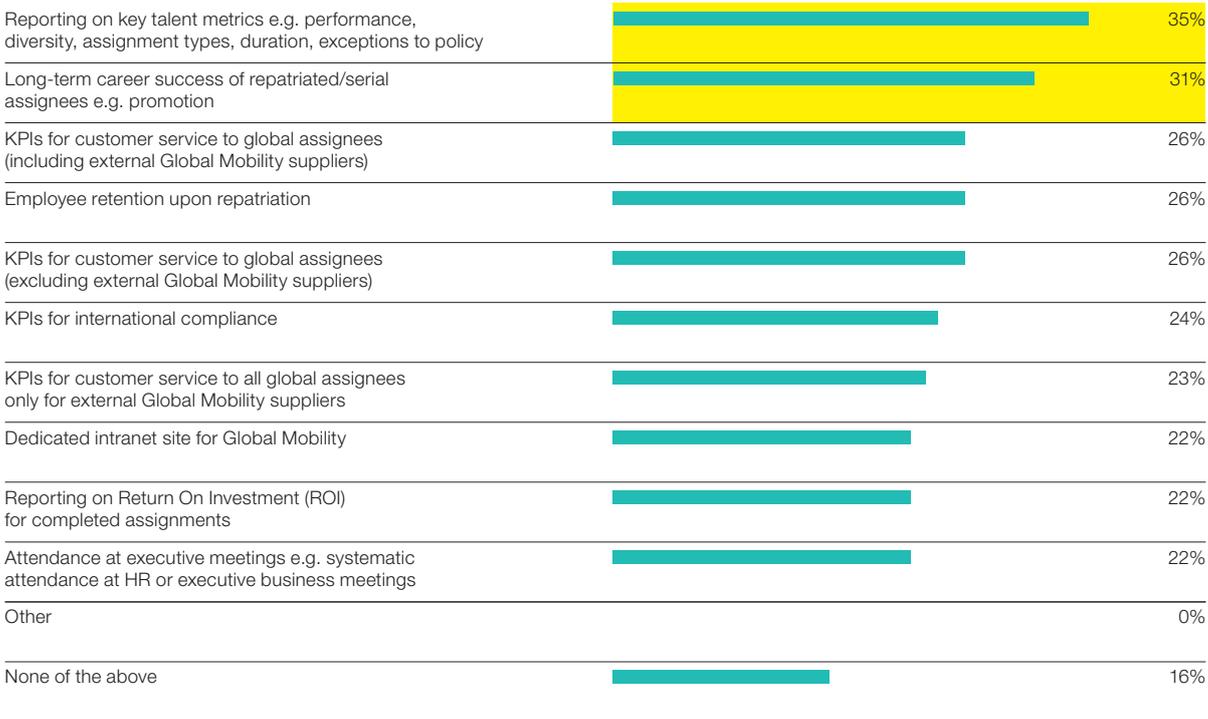
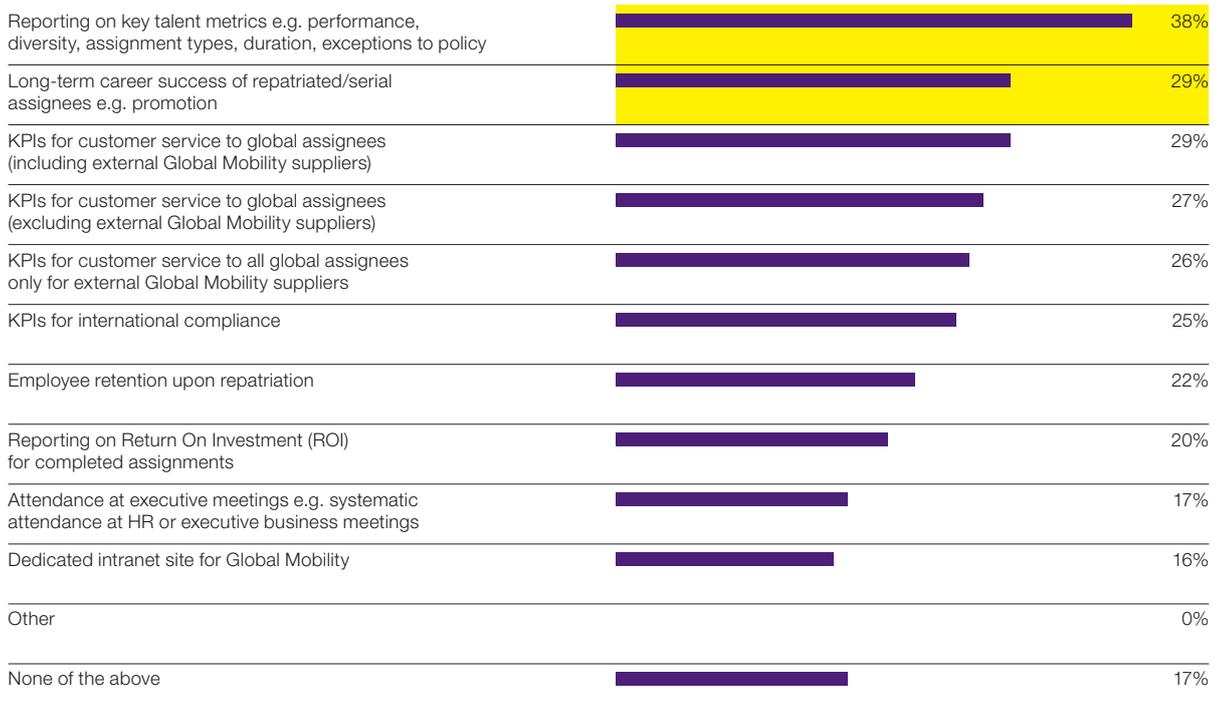




Fig. 22 provides additional evidence to suggest a similar approach in Asia.

**Fig. 22: Methods used to demonstrate Global Mobility's value to wider business (GM Asia)**



**Fig. 23** Data Global Mobility teams are currently providing to the wider business vs. data they should be providing overall demonstrates an increase in data provided. And yet surprisingly, Global Mobility professionals report that they in fact wish to reduce the amount of data provided on important elements, most notably assignment duration/extensions, total programme costs and compliance data such as tax filing. It may be that they see these datasets as information that could be provided by external supply chain partners.

Overall, use of data analytics remains an area of opportunity for Global Mobility professionals. For example, only a third are comparing forecast estimates with actual total assignment costs. There is recognition that more work needs to be done in providing cost comparison data (41%) and in focusing on risk management information (37%).

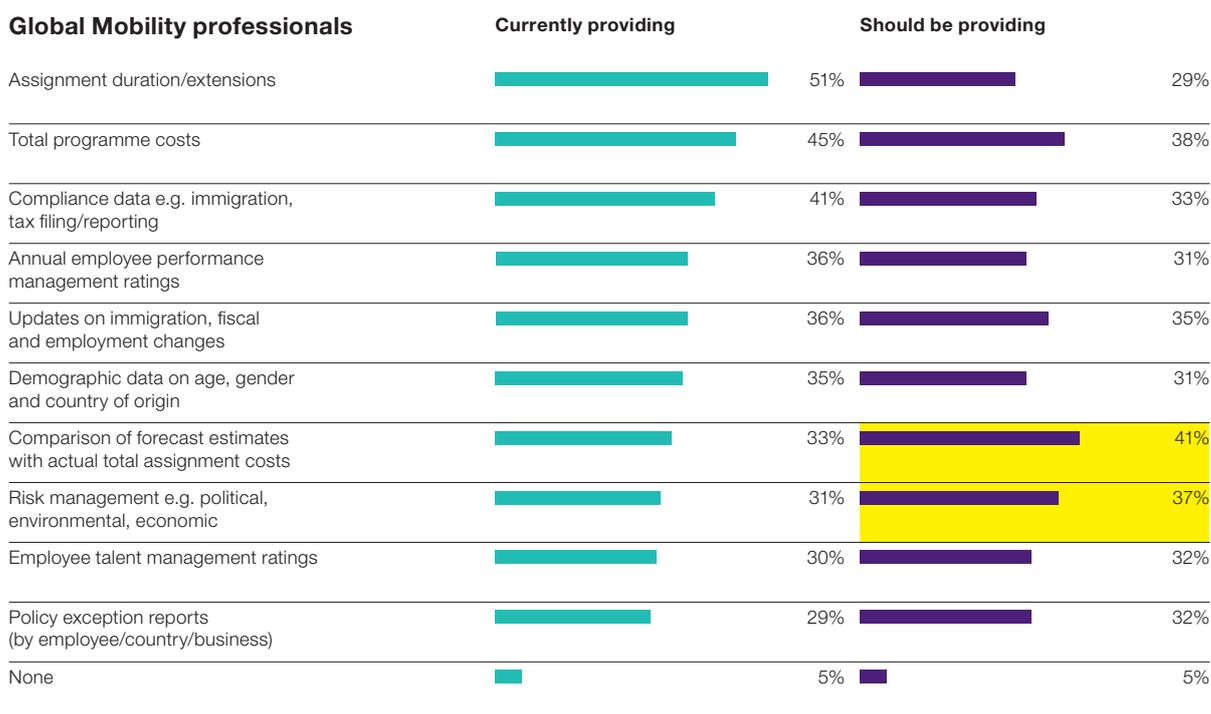
Moreover, without cost comparisons, the financial dimension of ROI cannot be accurately measured—making it harder for Global Mobility teams to demonstrate to the wider business the value of their contribution.

Given the substantial investment cost, especially in strategic long-term assignments, often six-figure sums at the end of a three to five-year period, why is there minimal investment in well-formed business case documentation? Where else would businesses spend hundreds of thousands on capital expenditure without a governance process? While executive management will have provisioned for the costs in operating budgets, is there a centrally held business case defining business, talent and longer-term forecast planning for any given role? With organisations often deploying for reactive, tactical reasons, combined with the rate of technological change, why is the business case only a nice-to-have and not a priority? Is this a case of deferring a talent problem for a rainy day?

Sectors such as technology, consulting/professional services and project-based organisations are most likely to have a strong handle on their total investment costs, as these relate to commercial activities requiring accurate costings.

Currently only 33% of whom are comparing forecast estimates with total assignment costs. Isn't this an ideal opportunity for Global Mobility professionals to demonstrate a sense of commercialism that could potentially open up access to executive management for these teams?

**Fig. 23: Data Global Mobility teams are currently providing to the wider business versus data they should be providing (GM)**



**Fig. 24** provides comparison with Asia, reflecting a similar profile as the global set in **Fig. 23**. But Asian data is more commercial by tracking forecast costs with actual and enhanced risk management information, along with data that will further support the need for strategic planning activities.



**Fig. 24: Data Global Mobility teams are currently providing to the wider business versus data they should be providing (GM Asia)**

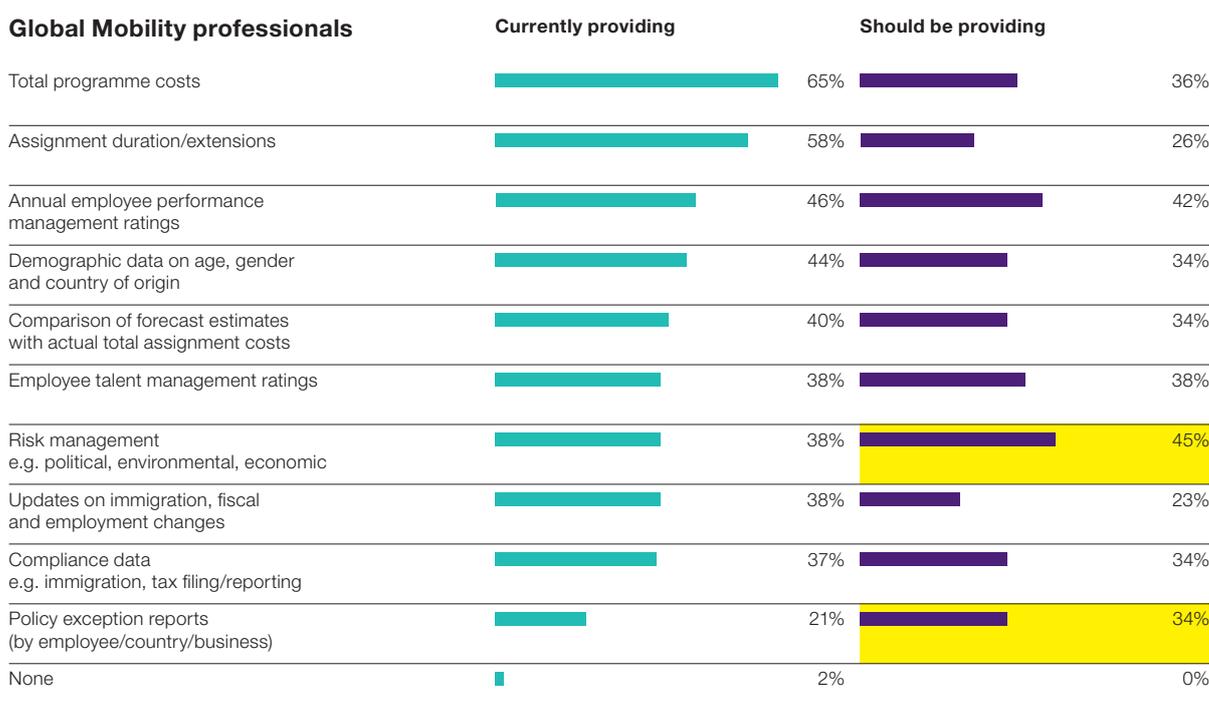
Global Mobility professionals	Actually spend time on	Should spend time on
Total programme costs	48%	40%
Assignment duration/extensions	45%	29%
Annual employee performance management ratings	44%	35%
Compliance data e.g. immigration, tax filing/reporting	40%	33%
Demographic data on age, gender and country of origin	37%	30%
Comparison of forecast estimates with actual total assignment costs	36%	44%
Risk management e.g. political, environmental, economic	35%	42%
Updates on immigration, fiscal and employment changes	35%	40%
Employee talent management ratings	30%	36%
Policy exception reports (by employee/country/business)	29%	34%
None	4%	4%

Compare this with the data expectations of Business Leaders in **Fig. 25** and it is surprising that Business Leaders (albeit a smaller sample) report that they do receive total programme cost data but are not as focused on it as one would expect! Surely, financial data is key for all organisations?

Given different priorities and focus around geopolitical disruption to business planning strategy and operational execution, a desire for more risk analysis is Business Leaders' highest priority. It may be that Business Leaders receive data by alternative channels, hence why they may not require the same levels of information from Global Mobility teams.

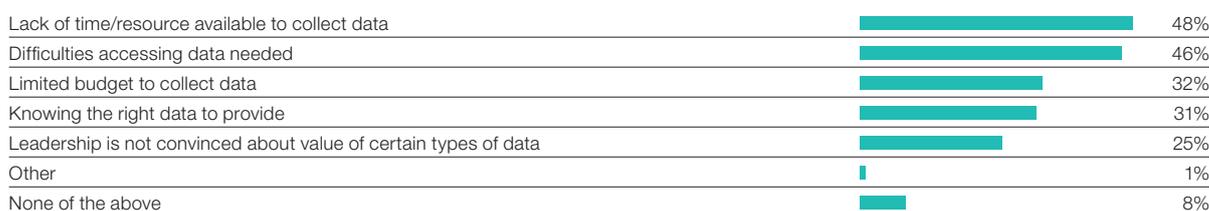
The key message from both data sets is the need for Global Mobility to ensure they engage in broader dialogue with their business and HR stakeholders to ensure that there is a shared purpose and direction, to avoid Global Mobility teams becoming isolated from internal decision-makers.

**Fig. 25: Data Business Leaders are receiving from Global Mobility teams versus data they would like to receive (BL)**



So, what is holding Global Mobility professionals back from providing data to organisations?

**Fig. 26: Barriers to the provision of data to the wider business (GM)**

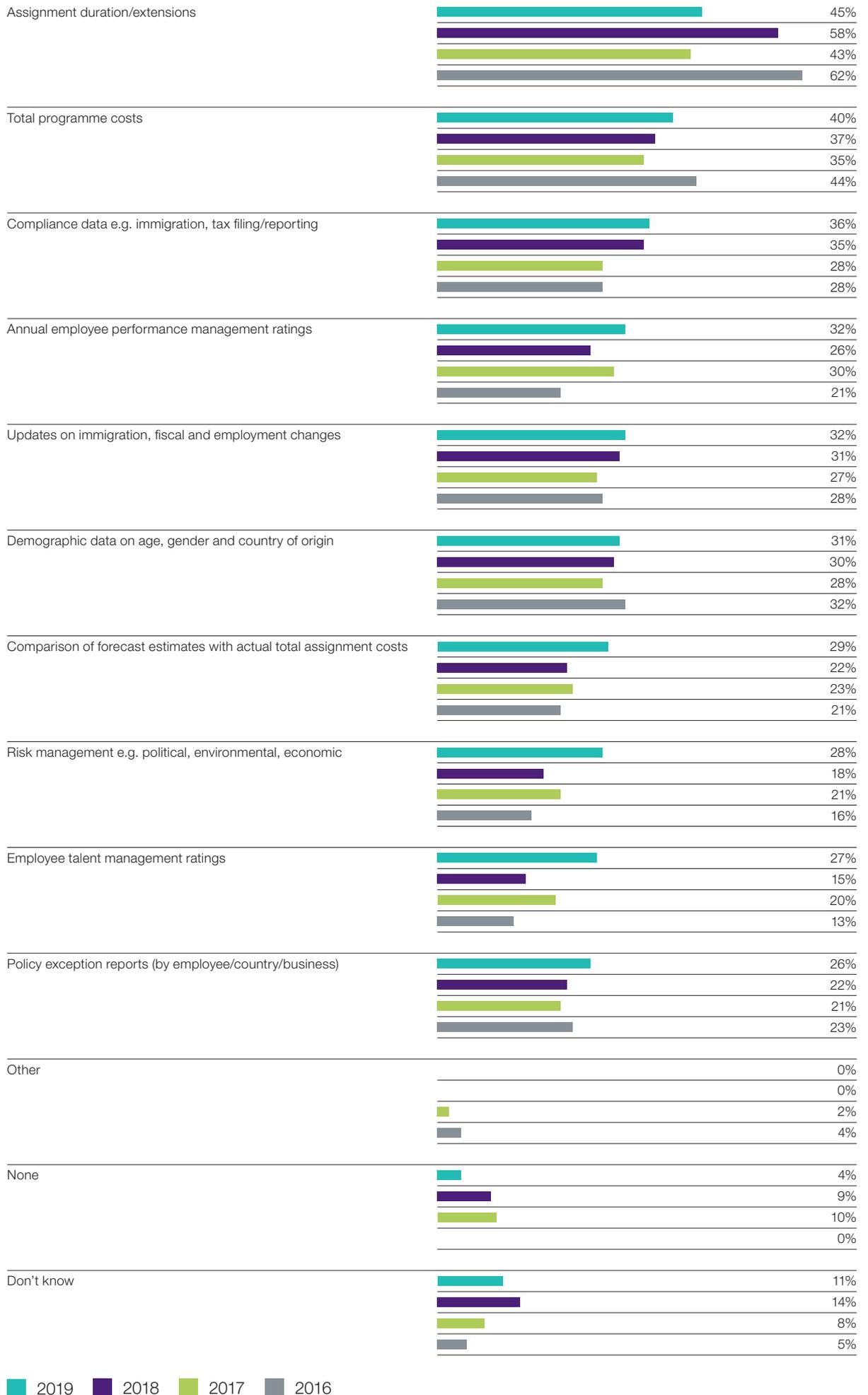


We saw in **Fig. 16** that Global Mobility professionals want to transform their roles to create more value for their organisation. **Fig. 26** above demonstrates this point, as 48% report that they do not have enough time or resources to collect the data they would need to share across the business, or that it is currently too difficult to access this data (46%).

I coach my HR teams to undertake three things when they deliver presentations and reports to me or the executive team. One: facts and data, two: analysis, three: opinions. Without this approach the business won't listen, and we would miss the opportunity to deliver incremental value into our organisation.

Senior HR Leader

**Fig. 27: What data do Global Mobility teams provide to the wider business? (GM four year analysis)**

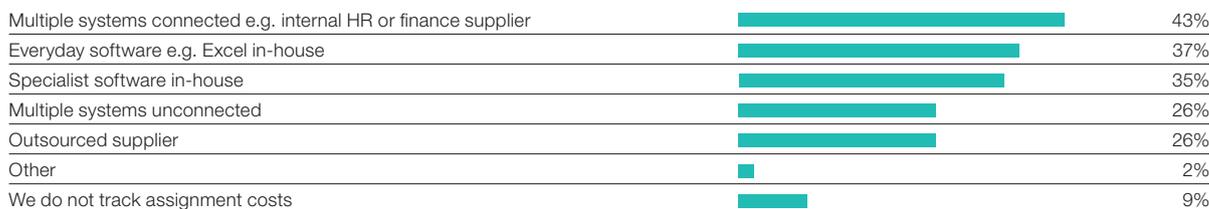


2019 2018 2017 2016

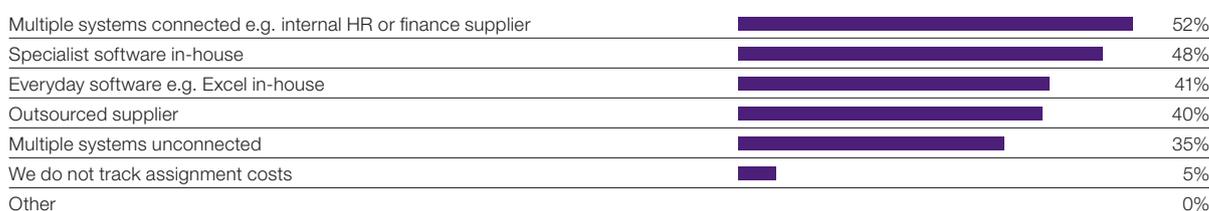
Transformation is about more than just releasing time by increasing the amount of operational work shifted elsewhere internally or to external supply-chain partners. It may be that data is held in multiple areas and lacks consolidation. This may be enhanced too by looking at access to more automated processes. Currently, over a third (37%) use everyday software such as Excel to track assignment costs, which, combined with complex networks of data repositories, makes it very clear why such data tracking is challenging for organisations.

Perhaps it's surprising that one in ten respondents (9%) do not track assignment costs at all. This may be related to the nature of their programme, which might follow less traditional models and be a series of permanent or indefinite transfers or international hires, or because their priorities for using assignments are not financially driven. Even so, the ability to deliver reporting and easy-to-track management data must be the goal of all Global Mobility professionals.

**Fig. 28: How costs are tracked during an assignment (GM)**



**Fig. 29: How costs are tracked during an assignment (GM North America)**



The key is to ensure that we work closely with our operating businesses to ensure we are both aligned regarding the full cost of supporting and deploying our professionals—given that our global brand is based on the quality of everything we do for our clients.

It's healthy to have a well-informed explicit business relationship between our Global Mobility teams and our business leaders and this helps us to focus our purpose and efforts on delivering both value and quality to our clients.

**Brian Horn**

Group General Manager,  
International Assignee Services  
International SOS

Many businesses appear to have identified the need to reduce tactical workload for Global Mobility professionals, and have invested accordingly in technology, to free up their time for more strategic work.

**Fig. 30: Global Mobility teams who have invested in new technology over the past 12 months (GM)**



Nearly half (48%) have invested in new technology in the last year, compared to last year's survey when only 29% said they had invested in the last 18 months—and this proportion rises to nearly two thirds (63%) in North America. It is clear that technology is seen as an opportunity to deliver greater visibility of the commercial aspects of managing Global Mobility programmes.

**The questions are:**

- + What technology solution provides optimal payback for our organisation?
- + How will it integrate with established workflows and people interactions?

If there is an expectation that the whole Global Mobility programme can be managed by technology alone, this may turn out to be a disappointment. The reality is that there is a balance to be achieved between human and digital, and finding this balance will depend on the industry, culture and assignment profile of an organisation.

Amongst those who have invested, the biggest benefits they have experienced tend to be relatively tactical—such as better cost estimations (42%) and improving assignment workflow processes (40%).

**Fig. 31: Advantages of investing in technology for mobility professionals (GM)**

Better cost estimations	42%
Enhanced assignment workflow processes	40%
Improves information provided to business management	39%
Better forecast versus actual cost tracking	34%
Improves employee's experience working internationally	32%
Improved data to inform future strategy with business management	32%
Improved management of risk and compliance	32%
Allows proactive management of relocation/supply-chain	32%
Reduces overall mobility programme costs for the business	31%
Indirectly improves the Return On Investment (ROI) of our assignments	30%
Improves employee's family experience working internationally	29%
Improves ability to illustrate Return On Investment (ROI)	29%
Other	1%
None of the above	4%

Nevertheless, many report that the information provided to management (39%) has improved as a result of technology, and nearly a third see more strategic benefits as a result of using new technology, such as having improved data to inform future strategy (32%).

For Business Leaders, the key benefit arising from investment in technology is much more strategic, such as the improved management of risk and compliance (55%) and an improved ability to demonstrate ROI (38%). Business Leaders clearly understand the benefits that technology can bring, so the mandate is there for Global Mobility teams to make the case for this investment. As Global Mobility teams continue to evolve and look for opportunities to focus more on talent and strategy while overseeing vital operational tasks more efficiently, technology is set to have a key role to play.

**Fig. 32: Benefits of investing in new technology (BL)**

Improved management of risk and compliance		55%
Better forecast versus actual cost tracking		41%
Better cost estimations		41%
Improves ability to illustrate Return On Investment (ROI)		38%
Improved data to inform future strategy with business management		34%
Improves employee's experience working internationally		28%
Improves information provided to business management		28%
Improves employee's family experience working internationally		24%
Indirectly improves the Return On Investment (ROI) of our assignments		24%
Allows proactive management of relocation/supply-chain		21%
Reduces overall mobility programme costs for the business		17%
Enhanced assignment workflow processes		17%
Other/none of the above		0%





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# REFLECTIONS<sup>02</sup>

## **David Carmichael**

Within our organisation we have endeavoured over recent years to develop more rigour and structure to our mobility programme aligned to business unit requirements. Thereafter we have placed significant focus on how the policies can be operationalised with our supply-chain based on defined requirements versus ad hoc/bespoke service needs and linkages with our effective internal administration. We have placed emphasis on balancing commercial reality with compliance and a business need for flexibility to deliver an effective and cost optimised programme. In our industry sector, we see an increased demand to change the way we provide services. Our employees ('members') want flexibility and they do not necessarily expect or need what we might refer to as 'traditional' services or approach to Global Mobility. At the same time, our managers continue to demand clarity—they need our members to move quickly and effectively and do not have time to understand the 'complexity' that is often inherent to Global Mobility. They rightly expect this complexity to be managed by our Global Mobility team.

We also see a need to move away from 'traditional' compensation models and we expect one-way transfers (though not necessarily 'permanent' transfers) to increase and temporary assignments to reduce. Staying tied to the original home is becoming less important or relevant than it perhaps was in the past—in part this is due to internal demands but is also in part, based on external requirements such as changes in immigration.

All of this means 'change' for anyone in the Global Mobility industry (in-house or supplier). It is telling that Business Leaders expect Global Mobility professionals to focus on workforce planning, Global Mobility strategy, etc... when in reality Global Mobility professionals largely, through necessity, continue to focus a significant amount of attention on compliance, the relocating employee's requirements and aspects of administration—albeit very complex administration. In addition, the reality also remains that Global Mobility generally tends to be low down the list of priorities for most organisations who are focused on other impact areas of HR i.e. talent acquisition, talent management, reward planning etc. Paradoxically, Global Mobility's profile is often highlighted when something has gone wrong, rather than for the reverse.

### **Key actions for Global Mobility professionals**

Compliance will remain a challenge—but the assumption should remain that compliance will be a challenge to navigate and will not remove the necessity for people to move. So the challenge should be embraced and as Global Mobility professionals we should continue to work collectively to find value based solutions to these challenges rather than highlighting all the reasons why a business requirement is not possible.

Global Mobility's role will continue to be affected (not challenged) with the introduction of robotics and automation—but this change should also be embraced—we should be open to the possibility that their introduction will change how we do business—but there is opportunity here, despite being complex, for a lot of our administration to transfer over to robotic/AI solutions freeing us to focus more on the strategic aspects of Global Mobility which is in line with what our CEOs are expecting of us.

## **Selina Jones-May**

Each of us has the ability to influence the destiny of the mobility programmes in our respective organisations. It is critical that we view ourselves as a strategic business function rather than an operational delivery team. By providing clear business cases and data to leadership we can demonstrate the value of our department and be regarded as a true commercial partner to the business. Irrespective of where mobility reports into, the key priority is that the function has direct access to leadership and decision-making. Mobility's role is definitely broadening out into other areas and we should actively seek and embrace such opportunities to broaden our responsibilities and skillsets. At Worley our function is a 'Centre of Expertise' which reports directly into the Global CHRO. Following our recent acquisition of Jacobs' Energy, Chemicals and Resources (ECR) business our COE has expanded to include international benefits (a new COE following projects we delivered) and expat tax (transitioning from corporate tax).

## **Dr. Yvonne McNulty**

### **Reference to Data Business Leaders are receiving from Global Mobility teams versus data they would like to receive**

Business see increased data provision on risk management (e.g political, environmental, economic) as the highest priority. Interesting and I agree. There are also geographical risks (dangerous locations), riskier employees (women, LGBT), managing firm-wide risks arising from man-made (employee) risks. HRM has a duty of care to foresee and plan ahead for a range of risks, not only the usual suspects of civil war and tax/work permit compliance. Like the world itself at the moment, people are unpredictable.

### **Prof. B. Sebastian Reiche**

Over the past few years, the Global Mobility Survey has pointed to a mismatch between desired and actual role responsibilities of the Global Mobility function—both as viewed by the function itself and by line management. This can be viewed as a continuous problem—and may in fact partly explain reputational problems of the Global Mobility (and HR) function more broadly. However, it can also be viewed as a strategic opportunity—of actively slicing Global Mobility responsibilities in a different way. Technology provides huge leeway to reconsider which aspects of the Global Mobility function need to be done manually and which could be automated. And the entire HR tech domain is growing rapidly (and seems to be attracting more venture funding than Fintech these days as it hasn't been properly disrupted). This calls for a strategic rethink of which aspects of the Global Mobility function should be kept in-house versus which could be accessed via external services. With sufficient visionary thinking, now is the time to prepare the Global Mobility function for the future—and Business Leaders are clearly giving the impetus to do so.

### **Phil Renshaw**

The core challenge for the Global Mobility function is that it only has primary accountability for the cost side of the mobility equation—the host business holds primary accountability for the value delivered. One bridge between these is controlled by the talent management HR function taking the long-term evaluation perspective. Another bridge is to complete business case documentation before every move—in which Global Mobility is primarily responsible for the cost data and the business is primarily responsible for the value data. Hence this is a joint exercise bringing expertise together.

My research identifies that the organisational value of international assignments is driven by their impacts on strategic capabilities. In other words, the skills learned, and knowledge shared reinforces an organisation's ability to remain strategically flexible, to reinvent itself and to maintain long-term success. Hence assignment decisions should be strongly connected with the business's long-term strategic aims, for example fitting with the vision, values and mission that have enabled success to date. This supports the growing demand by Business Leaders for Global Mobility professionals to be providing a strategic offering. Global Mobility needs to be pushing at this door—even though it is not always open—to demonstrate these relationships to Business Leaders. Localised task-based project decisions for an IA run the risk of investing limited funds in the wrong place.

Responses in the survey that international experience is desirable and often mandatory for senior leader and executive positions provides an insight into the assumed value that organisations gain from this experience. Unfortunately, however, the limited research we have suggests that this is most effective if the international experience gained was in a different organisation! So assuming employee retention is a good outcome, may be wrong. And this is in addition to the problem that, whilst the numbers appear to be moving in the right direction, ensuring the appropriate diversity in senior leadership may require extra steps, for example to encourage more female mobility.

### **Peggy Smith**

#### **Global, mobile workforce potential; evolving talent management processes; and an advanced mobility profession**

The workforce is transitioning to a blend of traditional and nontraditional workers, and we must build a space for all mobile people, in all the ways they are connected to work and business. The way we attract, engage, motivate, retain and reward our workers is evolving. Like most industries, as executive coach Marshall Goldsmith says, "What got us here won't get us there". Our expertise and insight are needed more than ever, but we must also accept that these are uncommon times, and we must build uncommon skills to meet the needs of employers. That means adding new competencies and knowledge, and a commitment to lifelong learning. This is an exciting and complex time for mobility—and one that is rich with opportunity.

# REFLECTIONS<sup>02</sup>

## **Ernst Steltenpöhl**

Global Mobility professionals have a complex role-set to navigate and their own tasks often reflect those of their HR generalist peers. However Global Mobility professionals have a deeper level of complexity to manage, for example the numerous and rapid changes in the field of visas and permits—especially where new countries have to be integrated—tax and social security systems, pension systems, health insurance and other insurance policies. The complexity of these may not be immediately visible to many, but their outcomes heavily influence whether an organization (and its employees) remain compliant.

It's evident that while Business Leaders desire their Global Mobility teams to focus on more value-added activity such as workforce, the reality for many is the need to focus on hygiene factors such as compliance and payroll. These are more transactional but equally as important to the successful functioning of the Global Mobility team.

Without the right data, we do not have the right facts. And without the right facts, we do not have the right information and communication! The challenge for Global Mobility teams is access to full and 'clean' data across the whole spectrum provided by internal and external partners. It is this that then makes it possible to shape the reporting and processes that ensures compliance, and provides management with insightful analytics.

To achieve this, Global Mobility teams need both full training and the right integrated systems to harness the full capacity of these data sets. In some cases, the large amount of data and information already at our fingertips can create a great temptation not to spend money on training and reliable systems. The consequences for an organisation can in some cases be disastrous.

## **Nicolai Wassmann**

Interestingly the survey shows that mobility professionals and Business Leaders commonly rate increasing compliance complexities as the most significant impact on Global Mobility function over the next 24 months. Simultaneously, both Global Mobility professionals and Business Leaders believe that Global Mobility should be spending less time on internal tax and immigration compliance than they are today. Whether this is a 'Gordian knot' or not, time will tell (Gordian knot: an extremely difficult or involved problem).

I see a mismatch on what Global Mobility professionals are spending time on and what Business Leaders view as where Global Mobility are spending time; 'Employee candidate suitability' rates 32% at Business Leaders and 8% at Global Mobility (bottom score), or when Global Mobility spend 34-35% on compliance whereas Business Leaders view this at 19%. It seems clear that Global Mobility has an important communication role to take in aligning understanding of what time is spent on and what time should be spent on; as this is essential for deciding how the Global Mobility function should transform (increasing trend) or investment in technology (also increasing trend).





# RISK 03



## Balancing risk and compliance

**Global Mobility teams are faced with a wide range of challenges as they seek to mitigate against risk while pursuing their objectives and growth opportunities.**

These include some recurring themes from the last section— ineffective strategic workforce planning (24%), along with not having the data needed to support that planning (24%), but also some perennials, such as immigration (33%) and tax.

It would be easy to think that organisations should have that sorted by now. Although regulations and requirements do change from time to time, it is rare for complete systems to be revised. However, new assignment types and new destinations mean that complexity remains even as organisational experience grows.

Authored by

**Peter Ferrigno**

Global Practice Leader Immigration  
and People Director

**Santa Fe Relocation**



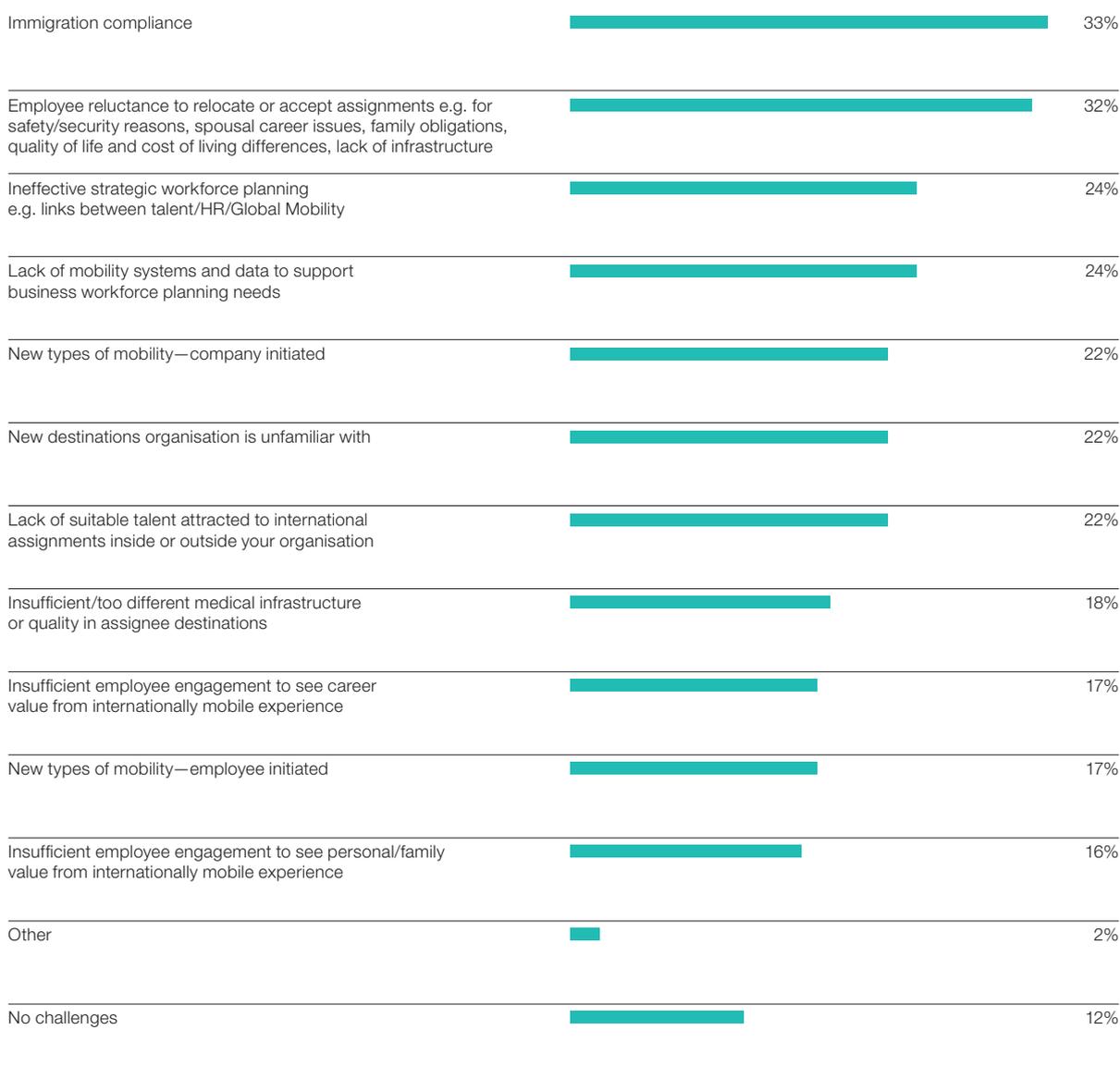
Looking at **Fig. 33** it is clear that the sustained high ranking of immigration as a challenge traces back to the changing nature of how organisations move people around the world. Organisations that may have been familiar with the rules for long-term assignments are struggling with the different types of permits required for short-term assignments or extended business travel. In addition, the old rules around tax treaty relief are more difficult to apply when people work in multiple countries at once, rather than in one at a time.

Authorities continue to see international business travellers and their employers as a good source of revenue, and that is not going to change anytime soon, so as new ways of working evolve, such as ‘gig’ workers undertaking assignments rather than employees, new risks will ensure that these stay at the top of the list.

Separate to the compliance risks, which we will return to below, are the resourcing aspects that make the role of mobility more complex. Employee reluctance to relocate can remain high when destinations are challenging. In growing labour markets where jobs are more readily accessible, taking an assignment may not feel like a risk. In a tougher labour market, assignees may weigh the risk of business uncertainty and the re-integration challenges at the end of the assignment and decide that the upheaval is just not worth it.

Many of the challenges shown heavily interrelate with each other—the family issues, dual career issues and quality of life can overlap to reinforce that ‘just not worth it’ feeling. Likewise, from the company’s side, shortages of available skills and workforce planning are two sides of the same coin. New jobs and roles come into existence and a decade of tight headcount restrictions means that the investment into new skills to grow the pipeline of talent hasn’t kept pace.

**Fig. 33: Main challenges expected to achieving Global Mobility objectives over the next 24 months (GM)**





On a macro basis, we always aim to be fully compliant but it's recognised as an ever increasingly complex area that requires financial and people investment. Of course, the cost of data breaches and non-compliance are significant, but this is just another factor in being able to operate globally.

We expect all our supply-chain partners to ensure they are also fully compliant too and place great emphasis on this, and to achieve this we employ resources to focus on this area and put in place systems to audit this compliance.

**Brian Horn**

Group General Manager,  
International Assignee Services  
International SOS

## Challenging locations

Some locations are more challenging than others, and interestingly the USA has moved up the list to become the most challenging destination, overtaking China and India. As three of the largest countries, it is perhaps unsurprising that these are the same top three as last year. What is more surprising, is that the USA has overtaken both India and China, when the gap last year to China especially was quite large.

Shifts in the political environment, and the perceived openness to international business and workers have been significant in the past two to three years, perhaps more than would have been believed when globalisation seemed to be a one-way journey. The backlash and populism that have followed have meant that foreign investment is viewed a lot less positively, which has a knock-on effect on the mobility of those individuals who would be supporting it.

## Most challenging assignment destinations

### Destinations

#1	USA	11%	(+4%)
#2	China	10%	(-5%)
#3	India	6%	(-2%)

Fig. 34: Why are these destinations most challenging? (GM)

Cultural differences	40%
Immigration complications	38%
Concerns about personal security/safety	34%
Language difficulties	34%
Political climate	33%
High cost of living	31%
Differences in legislation	27%
Lowered quality of life	25%
Diversity climate e.g. race, sexuality religion, gender	25%
Complicated tax system	23%
Insufficient infrastructure	23%
Unsuitable for accompanying family members	21%
Corruption	21%
Availability of suitable housing	20%
Country with high levels of tax	18%
Other	2%

Intercompany transfers (ICTs) should be easier, and they certainly remain so in most places for more senior staff. However, in practice this does not always apply to people at every level in the organisation. This is particularly the case where the host country has an abundance of suitably qualified/skilled individuals in that profession. Not every country has rules for ICTs—some still don't differentiate and some have more differentiation than ever before. Understandably, host countries need to keep their indigenous workforce in employment and governments, with the support of technology, are getting better at matching visa policies to those areas of their economy with the greatest need. This has made visa regimes more responsive to a country's need, more agile and flexible, which in turn leads to more changes in visa related rules and regulations.

### Peter Graham

Group Director of Visa  
and Immigration Services

**Santa Fe Relocation**

Cultural differences (40%) and immigration complications (38%) are the two main factors which give those challenging destinations the title. Despite the ever-increasing ability to know more about the world from wherever you start, cultural differences remain high on the list. In some ways, vague familiarity with a place from online research or seeing a culture when it is exported, may give assignees the illusion that they know or understand a place. When they get there, it can then potentially be even more of a shock.

Many countries have simplified immigration routes for intercompany transfers, although those often have requirements such as a minimum employment period prior to the move or minimum salary requirement. New types of assignments may make a process that was starting to become straightforward suddenly become more complex. Where a contractor is used for a project rather than an employee, they are much less likely to meet the minimum period requirement, for example.

In some ways mobility is becoming more fluid. More commuters and business travellers, for example with Brexit being a definite trigger. Organisations should be mindful and alert that wherever there is a mismatch between payroll location and jurisdiction in which employees are working there is a requirement to check compliance (payroll, social security and income taxes). These fluid and more informal mobility set-ups are not always visible to in-house experts who can analyse the compliance alone. Organisations should therefore ensure systems are in place to track those employees who are working out of their payroll location. Without this, compliance isn't possible.

The world of formal mobility, short-term and long-term assignments, remains challenging for employers. Alongside some moves to protectionism of labour workforce in some countries, we are seeing trends in how certain countries (a number in Africa) are actively targeting the expat or assignee from a compliance perspective. These fiscal authorities recognise that the global compensation information flow may not be timely or visible to the local organisation so they may not be able to meet payroll obligations. In other countries, we see that fiscal authorities continue to see expats and the assignees as the Achilles heel of multi-national organisations.

More and more we see a structured approach to payroll audits where organisations are being routinely asked for lists of assignees, business travellers and assignment policies. If fiscal authorities know who is in a country and get an understanding from policy of their compensation entitlement, they can then check the payroll reporting and compliance. The complexity here is the number of sources and providers that can be involved in delivering global compensation. Process, data management, technology alongside mobility tax expertise remain key. Alongside this, there remains ample opportunity to reduce employer costs through active tax planning. Expatriate tax concessions, away from home costs, dual household and temporary workplace type of tax deductions can considerably reduce overall cost to the employer.

**Dinesh Jangra**

Partner, Head of Global Mobility Services  
Crowe UK LLP

Tax systems on their own haven't necessarily become more complex, but gradually technology allows the integration of the immigration and tax systems, meaning that compliance needs to be looked at holistically for both. Withholding of tax for employees on foreign payrolls is also increasingly becoming an obligation of the local economic employer. It's not as simple as ensuring presence in the country is less than 183 days. This is more difficult when the individual is self-employed or hired through an employment company, where their salary is different from their day rate. So, again, new assignment structures, and the development of the gig economy around the world have only made more complex an issue that had been becoming routine.

Challenging destinations also cause issues for employees around personal security and suitability for families. Whilst there has been a period of comparative relative stability in the world, surprise disasters can happen anywhere at any time, and employers have a duty of care to ensure that their employees are not put in any unnecessary danger. Risks and challenges of an administrative level are an inconvenience. But exposing assignees to physical risks creates another level of complexity for HR and Global Mobility to deal with and can create significant costs for the company. For this reason, we have sought the views of Inkerman Group this year to discuss these aspects further.

Duty of care and personal security are incumbent on both the company and individuals' own self vigilance—in the event that a company provides the information and infrastructure, the individual has a duty to accept and respond to what is provided. Personal security is important to keep on the front gas ring and not on the back boiler and to be current especially as to where you are travelling to and where you live. Complacency kills and this applies to the business community who are seasoned travellers (or who think they are) and never read the security briefs prepared for them—unexpected situations, incidents and risks change in every country, with no warning. In the same way, they do not watch the safety demonstrations on planes. I always listen and watch the demonstrations to make sure I know where the exits are, because they are not always in the same place especially with different aircraft and look at my fellow travellers. If there is an emergency, can I reach the exit points so I can help others—other passengers who are infirmed, unable to physically move quickly or have infants. Easy to say but hard to implement!

Duty of care products are the responsibility of the HR function—robust, informed briefings, training if necessary, security of accommodation in-country before expats travel, local custom awareness and so on; depending on which destinations business travellers are going to and the level of risk associated with these locations, individuals may need to have tracking apps available to them. Female travellers and expats have different challenges—despite what Western cultures demands, this is not necessarily what can be delivered in single cultured countries. So, for example, there are cultural nuances which need to be made clear—there are countries where women cannot drive cars, in other countries there is a requirement for heads to be covered. In some countries when travelling by taxi and you have a spare seat and there is someone by the side of the road thumbing a lift, cab drivers will stop and let them in; in no circumstances should you let them in, even if it is accepted practice as it is a quick way to be robbed despite the custom, so tell the driver before you start, no random pickups.

Personal safety is linked with social media as well. How many of you have announced to the world that you are in Terminal Five in Heathrow and travelling with BA to Johannesburg and posted it on Facebook? The potential bad boys now know your name, when you will arrive and what you look like plus that your home is empty for the time of the trip. Read the security briefs that warn of all the hurdles you are likely to encounter; do you know the IT entry restrictions imposed by the country you are going to; do you have a prescription signed by a doctor saying the tablets you have are for you and that your medical condition requires them (Aspirin is not allowed in certain counties, even if transiting)? Not all police have the same standard of training as those you are used to and also the laws will be different.



There are multilingual Apps available now that can tell you the unrest closest to you or incidents that affect both security, medical, embassy, currency, banks and travel information which are recommended especially when moving to a new country and place of residence, and that information is instantaneous. Let technology support you. How long does it take you to upload the new operating systems when they are made available to you? The answer should be no time at all as there is a reason for the update and normally there is a heavy security implication. Update straight away to the detriment of what you are conducting at that time; if not, you are vulnerable to a hack or cyber intrusion. The risk of using WiFi Hotspots and being hacked is well-known so, if you need WiFi, create your own hotspot.

There are strong messages for organisations with people working globally know where your people are and what happens if something goes wrong. This approach should be applied to all types of incidents and risks—terrorism, natural disasters, disruptive incidents and crisis. The risk map is changing and attacks come from all sorts of groups worldwide—active shooter events have been seen across the globe including in Europe and recently in New Zealand, as well as country locations which would be considered of a higher risk. Are your people informed about what they should do if they are caught up in such circumstances? It's worth them having training for that—protecting your people and their families are critical responsibilities.

### Reflections

- + Duty of care policies, procedures and processes—if these are not in place in your organisations, they should be; if they are, they should be reviewed and on a regular basis to make sure they are fit for purpose; the world is a constantly changing place and so are the risks within it. Speak to experts in the field who can provide the skills and knowledge required to get this right.
- + Make sure that information is provided—comprehensive, detailed security briefs for every country travellers/expats are going to—the towns and cities they will go to live and work in or will be travelling to, on an ongoing basis.

**Gerald Moor**  
CEO  
The Inkerman Group

## Industry-specific challenges

Interestingly, some industries have a different ranking of the reasons why destinations are challenging. We will provide industry-specific reports throughout the year, but taking a look at the technology and communications industry in **Fig. 35** for example, there are many differences compared to the overall survey responses.

The biggest differences are for political climate (42% rather than 33%) and diversity climate (37% rather than 25%). Interestingly, the challenge of immigration is marginally lower for technology organisations (32% rather than 38%), despite the tightening of immigration rules in the USA which has impacted the Silicon Valley in recent years, or the protectionist limits on Indian IT workers coming into more mature markets on short-term projects.

**Fig. 35: Reasons why destinations are challenging—technology and communications (GM)**

Cultural differences	46%
Political climate	42%
High cost of living	41%
Concerns about personal security/safety	40%
Diversity climate e.g. race, sexuality religion, gender	37%
Lowered quality of life	36%
Insufficient infrastructure (roads, transportation etc.)	33%
Immigration complications	32%
Differences in legislation	31%
Unsuitable for accompanying family members	28%
Language difficulties	26%
Complicated tax system	24%
Country with high levels of tax	21%
Corruption/Insufficient corporate governance	19%
Availability of suitable housing	18%
Other	0%

## Employee willingness to move

In addition to those challenges and risks making life difficult for HR and Global Mobility, their biggest impact is on calling into question from the employee's side whether they should move abroad at all. These reasons appear to link back to the second main challenge to achieving Global Mobility objectives in the next two years—employee reluctance to travel in the first place (see **Fig. 33**).

Global Mobility teams can address staff concerns around safety as discussed above, but an understanding of cultural differences in particular is increasingly important.

On top of preparing for such a wide range of compliance and socio-political immigration challenges, it is imperative that Global Mobility professionals prepare their employees to understand local laws, etiquette and public behaviour expectations—particularly for countries where breaches could lead to criminal prosecution.

However, this is not currently always standard procedure for Global Mobility teams, and in many cases the responsibility is pushed back onto the employee to find the information for themselves.

**Fig. 36: How Global Mobility prepares employees to understand host location norms, where breach could lead to criminal prosecution (GM)**



- Self-conducted
- Conducted externally
- Conducted internally

The most common approach is to let employees manage their own cultural preparation (34%), while one in ten Global Mobility professionals do not know what their company's policy is on this subject. Failing to suitably prepare assignees for host location 'norms' could have significant ramifications for travelling employees.

The availability of online courses supposedly makes it easier for organisations to provide a basic level of training. If that is a replacement for nothing, this is clearly an improvement. If, however, this is at the expense of a detailed face to face session, the money saved may end up being cost elsewhere as the assignment is less successful than it could have been.



## Business travel risks

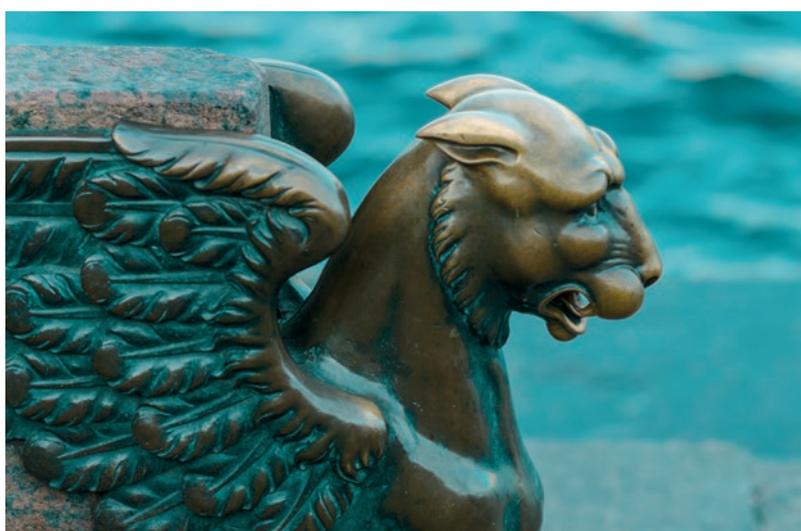
The immigration and tax risks referred to above are particularly relevant and topical with regard to business travellers. **Fig. 37** cites the changes in technology, cheap air travel, and the comparative low number of countries ‘opening up’ to foreign investment as reasons for a shift in the nature of mobility.

Many more organisations use extended business travel or commuter assignments as a replacement for more traditional assignments. Relatively open borders can mean that this is not usually as well tracked as assignment models are, and this can create compliance risks at an organisational level.

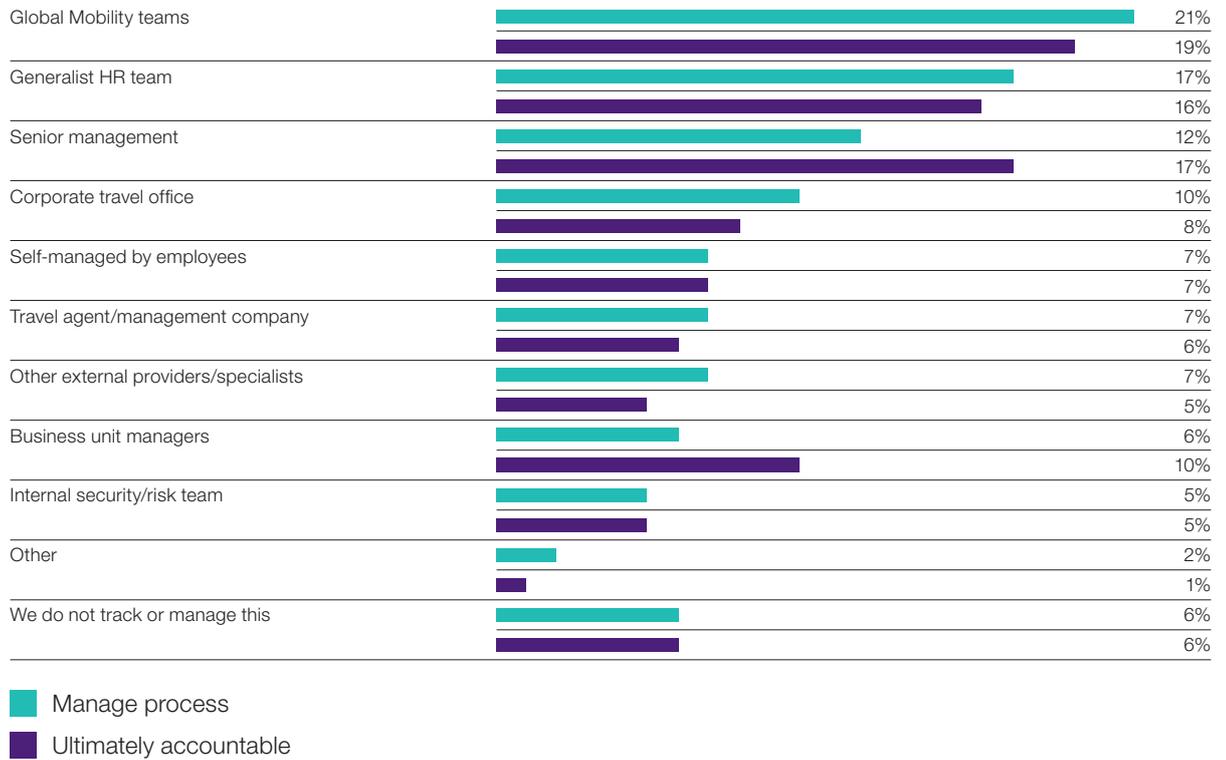
Where business travellers are not assignees, there remain a significant number of organisations where unclear processes run the risk of evading compliance; examples include where a business believes Global Mobility is tracking business travellers, but hasn’t informed Global Mobility that it should be doing this, nor provided an appropriate budget.

**Fig. 37: One box to the left<sup>4</sup>**

Type of travel	Business trip	Commuter assignment	Short-term assignment	Long-term assignment	Permanent transfer or hire
<b>Old scenario</b>	Trips for preparatory or relationship purposes.	Project-based, with no physical move.	Traditional up to one year model for projects or roles, with physical move.	Traditional two to three year model with assignment benefits for ‘strategic’ reasons.	Usually for external hires or localisation.
<b>New world</b>	What used to take a business trip can now often be a Skype call with screen sharing of presentations.	What used to take a commuter assignment can now be accomplished with remote working combined with a few business trips.	Short-term assignments could become commuter assignments, with less disruption to careers and families, as the lower cost of airfares relative to other expatriate costs redresses the balance.	The disruption to a dual-career couple with children can be mitigated by trading a long-term assignment for a short-term assignment followed by a period of commuting. A small apartment and lots of flights will cost less than a family house and expatriate school fees.	Where no home to return to, move is ‘permanent’ to make clear that there is no intention to return back to the source country.
<b>Typical scenario</b>	Was a commuter assignment, now a series of business trips.	Was a short-term assignment, now a commuter assignment.	Was a long-term assignment, now a short-term assignment followed by commutes or business trips.	Fewer strategic assignments, relatively more developmental assignments.	Assignees from source countries other than headquarter deployed on a move to move basis.



**Fig. 38: Who manages the process and is ultimately accountable for compliance? (GM)**



In **Fig. 38** only 38% of organisations have Global Mobility or HR teams managing the business travel compliance process—suggesting that the other two thirds have someone other than Global Mobility or HR fulfilling this role. With senior management and business unit managers more likely to be accountable rather than actively managing the process, there appears to be an opportunity for stronger ties between the rest of the business and its Global Mobility or HR team.

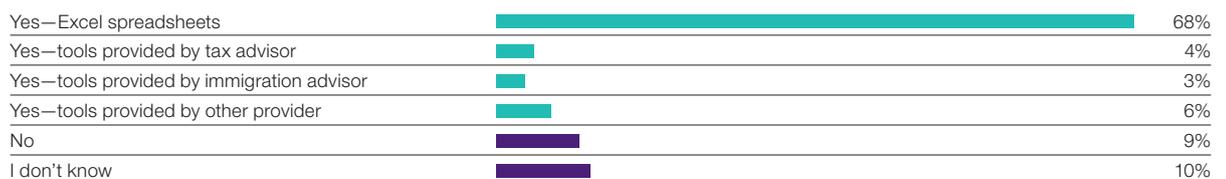
The majority of organisations (78%) have a programme in place to ensure that international business travel is compliant—either for immigration requirements (65%) or income taxes (55%). Yet one in five (22%) have not yet set up a programme to execute this.

**Fig. 39: Do Global Mobility professionals have a programme in place to ensure international business travel is compliant? (GM)**



While in most cases this programme is managed through technology, as with data management in the previous section, it tends to be via basic methods such as Excel spreadsheets (68%). Many immigration and tax providers have tools for their clients to use to track the risk, and it remains surprising how few have implemented these.

**Fig. 40: Is this programme managed through technology? (GM)**





We still see many organisations using very basic solutions to support their business travellers and to manage their immigration and tax compliance. Increasingly, we are learning of cases of non-compliance that could very easily have been avoided, together with the large penalties involved, from a solution that allows travellers to easily determine whether or not they need a business visa for a particular trip, to tracking them on their travels and providing targeted real time alerts and advice notes on key immigration, tax and social security regulations they need to be aware of. A single solution to gather all this information and provide reassurance to the traveller can also ensure appropriate data is provided routinely to all those in the organisation who need to know.

**Peter Graham**

Group Director of Visa  
and Immigration Services  
**Santa Fe Relocation**

As with the need for investment in technology to improve Global Mobility teams' use of data, there is also a case to be made for more advanced tools to be adopted, in order to improve the efficiency and overall processes of compliance for international travel, and thereby reduce the risk. Finally, a perspective on General Data Protection Regulations (GDPR) post implementation in May 2018 that we first reported on in the Global Mobility survey 2018.

When GDPR was first introduced in 2018 it was viewed to some extent, as a 'tick in the box' process but one of our trends is that privacy and transparency are the same side of the coin, in the same way that transparency is so important, but privacy is on the flipside of the coin too. Whilst when it started, it felt as a compliance exercise. If you look at the future, and if you look at where we are heading to, in terms of digitisation, this is going to be an even bigger theme.

If you look at the pressure on global social media companies and even the bigger companies or fintech organisations, they all will be scrutinised—if they don't have their data or privacy in order. I can also imagine that in the next 10 years you might have personal insurance against data breaches, with insurance companies keeping your data clean and safe.

Then the thing is, are you addressing this area simply enough for people to understand the impact and implications of what happens and what could happen with their data? People cannot fully comprehend what you can do with data on both the 'good' side and also on the 'dark side'. I believe we should pay our highest attention to that as we under estimate what's coming ahead.

**Janine Vos**

Member of the Managing  
Board and CHRO  
Rabobank

# REFLECTIONS<sup>03</sup>

## **Selina Jones-May**

Risk and compliance complexities are certainly a daily challenge for our function due to the diverse range of locations that we mobilise people into. The additional pressure is identifying compliance solutions under tight commercial bidding deadlines for project locations where we don't have an entity. Troubleshooting is definitely mobility's middle name and we rely upon our external providers to partner with us on these cases! Post-acquisition our assignee volumes are set to increase by almost 300% so we are in the process of investing in a full international payroll and additional configuration of our assignment management tool to enhance our team's delivery instead of significantly increasing headcount. Proactive management/contingency planning around complex and often unpredictable compliance requirements will continue to impact our respective programmes. It's critical that we educate the business and raise the profile of such matters so that they truly appreciate the important role that our functions play in enabling global expansion and protecting the interests of both the corporate and its employees.

## **Nicolai Wassmann**

The current trend of shorter and shorter assignment periods happens in a world becoming faster with Internet of Things (IOT), RPA, Artificial Intelligence (AI), and technologies that we cannot predict or imagine now. Alongside tax and social security rules, international agreements are getting more and more out of sync with changes in future work arrangements. In this complexity, the pressure on Global Mobility to manage risk and compliance, balancing business strategy and employee demand for flexibility/career opportunities, will be an increasing challenge.

## **Ernst Steltenpöhl**

As one would expect, increasing compliance complexities over the next 24 months remains the highest priority for Global Mobility professionals. Is this due to the fact that many governments' IT systems are better at tracking the travel movements and work activities of internationally mobile employees than most organisations? This in combination with stricter regulations and stricter controls makes compliance one of the top priorities within Global Mobility.

Business travellers, short-term assignments and commuters are increasingly performing the tasks that were previously performed by 'traditional' expatriates. These assignments are often initiated and arranged by the line manager of these employees. For these managers, this is often their first experience with Global Mobility and they are not aware of the complexities in comparison with a traditional assignment. These managers are driven by two priorities as set by the top management: make it happen and reduce cost where possible. These assignments are often unknown to Global Mobility departments and they are not informed by management or the broader organisation, creating major risks in terms of compliance for the company and its employees! Sadly, some managers believe that as long they are not informed about compliance risks, such risks do not exist.

Business Leaders, who might be globally mobile themselves may assume the simplicity of international business travel activities and yet expect Global Mobility and HR teams to take accountability for mistakes in the process and compliance. The two key things that would improve this situation are enhanced awareness of the compliance risks for Business Leaders and acceptance of more accountable and proactive engagement with those responsible for enabling the internationally mobile workforce. An important solution in addressing this situation is engaging Global Mobility professionals in specialised compliance and mobility training and education, which is one of our goals at the Expatise Academy. This foundation is the only in the field of Global Mobility which provides courses up to academic level (Erasmus University).





**FUTURE**



# Beyond the looking glass

**There is no doubt that the Global Mobility industry is in the middle of a massive period of transformation and the 2019 survey highlights many of the decision points associated with this transformation.**

As a moment of reflection, it is interesting to review where we are now, compared to where we have come from. Many of the ‘new innovations’ can be seen as trends that we have witnessed before; lump sum and flex/employee choice programmes have existed since the 1990s (at least) and yet today, they are somehow seen as innovative.

As organisations shift their business and talent compass, the teams supporting them, shift theirs too. The challenge and opportunity, therefore, are the ability to ensure continuity of legacy ideas, continuing education and leading practices. Governance is essential as organisations adapt, for example, alternative policies or their team structures, or their operational models.

It is evident that Global Mobility needs to evolve to align with the changing needs not only of their organisations who relocate employees but also an increasing diversity and differential set of employee expectations—all against a background of increasing geopolitical uncertainty. There is also a growing understanding that Global Mobility has a need for change.

## **What is not so clear however is the ‘how’?**

Developing a roadmap for change must involve an analysis of multiple stakeholders (both internal and external), together with clarity on the value contribution Global Mobility teams should deliver over the coming months and years. Could they be better achieved through alternate channels that factor in technology, insourced or partial outsource models? It is also clear that there is not ‘a one size fits all’ solution and that any evolution must address the specific cultural and structural needs of the organisation.

The mantra of ‘stable and agile’ is well documented but it seems increasingly appropriate. We have seen a growing number of smaller organisations undertaking periods of accelerated growth, who are relocating employees for the first time. Some of these are rewriting the ‘rule book’ in terms of how to deliver their Global Mobility programmes and seem to have closer links to talent and employee engagement and thus more alignment to their organisational objectives. Global Mobility should look to this ‘disruption’ as the testing ground for innovation and best practice.

Finally, Global Mobility service providers are also evolving along a continuum of technology from automation through to high touch human contact. Industries and business needs determine the profile of the relocating employee—while some are better able to take advantage of self-service technology, it would be prudent to consider the duty of care to employees, who after all are also human beings. Whichever way we look at it, Global Mobility is taking a unique human being (and their family unit) and exposing them to a massive and disruptive change cycle that can only truly be supported by strong human integration and support.

We should never be frightened of making the investment in service provision to support this requirement and the drive to cheapest is not always going to deliver the result. The costs of failed assignments whether monetary or personal are high. The organisations that continue to support their internationally mobile employees will be the ones that thrive.

## **Robert Fletcher**

Senior Vice President  
of Mobility Solutions

**Santa Fe Relocation**

# METHOD

Today 15:22

**Dear Name,**

We acknowledge the receipt of the initiation for **Mrs Name Surname**, relocating from **South Africa** to **France**. Our Global Mobility Consultant, **Name Surname**, will contact **Name** within one working business day. We will keep you updated at every stage.

**Name Surname**  
Global Mobility Manager

## The process

Santa Fe Relocation commissioned Savanta to conduct the Global Mobility Survey 2019. 703 professionals responsible for Global Mobility programmes across 35 countries were surveyed along with 53 Business Leaders from six countries and territories: the UK, US, France, Denmark, Singapore and Hong Kong.

### Survey respondents represent organisations that in total employ:

- + At least **5.2** million staff globally.
- + At least **20,316** full-time and part-time Global Mobility professionals.

### Respondents are globally managing:

- + At least **674,759** internationally mobile assignees.
- + At least **1,073,364** business travellers.

### Global Mobility professionals responses by ...

Industry sector	
Technology and communications	13%
Manufacturing	11%
Financial	10%
Engineering	8%
Professional services	7%
Retail	7%
Construction	5%
Automotive	4%
Pharmaceuticals and health	4%
Aerospace and defence	3%
Consumer products (FMCG)	3%
Education and training	3%
Transport and logistics	3%
Utilities and energy	3%
Hospitality	2%
Travel and tourism	2%
Diplomatic and governmental	1%
Legal	1%
Others	9%

Headquarter location	
Europe	50%
North America	24%
Asia	21%
Africa	2%
Middle East	1%
Australia/New Zealand	1%
South America	0%

Respondent location	
Europe	43%
Asia	36%
North America	16%
Africa	3%
Middle East	2%
Australia/New Zealand	1%
South America	0%

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**Savanta:**

# Participation

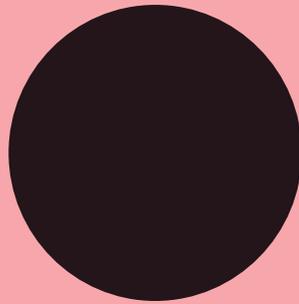
## Some of the organisations that took part this year

AECOM	Linxens
Amadeus	LIXIL Corporation
Apollo Tyres Limited	LVMH Moët Hennessy Louis Vuitton Inc.
Aspen Insurance	Mammoet
Assystem	Mavenir Systems Pvt Ltd
Atradius	Melexis
AVA Advisory Limited	Meliá Hotels International
Avaloq Evolution AG	Mercedes Benz Distribution Indonesia
BAE Systems Plc	Micron Technology Inc.
Bayer	Nedbank
Bridgestone EMEA	NH Hotel Group
Bühler AG	Oceaneering
CGI	OHL
Chassis Brakes International	Philips
Chopard Limited Hong Kong	PPG Industries
Chr. Hansen	Pro Function CA
Citco	PT Epson Indonesia
Combined Market Vendor, S.L.	PT Hexindo Adiperkasa
Dale Carnegie Thailand	PT Intecs
Danone	PT RHB Sekuritas Indonesia
Deloitte	PT Nokia Solutions and Networks Indonesia
Destination Art	PTC GROUP
Edelman	PVH Corp.
Edrington	R. N. Marwah & Co. LLP Chartered Accountants
Edwards Limited	Ramboll
Electronic Arts	Repsol
Eramet	SBV Services
ERM	Siemens AG
EY	Sime Darby Auto Kia Co., Ltd.
F.C. Barcelona	Sonae
FCA Group LLC	Standard Bank
Gestamp	Swarovski
Grifols	Takeda Pharmaceuticals
Haibo He	Tessenderlo Group
Halcon Group	Teva Pharmaceuticals
Hatch Africa	The Estée Lauder Companies
Heineken South Africa	The Foshan EtonHouse International School
Howden Group Limited	UCB SA
IKEA Purchasing Services Italy	Unlimited Systems
Indra	Vifor Pharma Group
International Paper	Webhelp
Jardine Schindler Lifts Co.	WECTEC Staffing Services
Johnson & Johnson	William Grant & Sons
Kelly Services Inc.	Worley
Lego System A/S	

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Special thanks to Cercle Magellan for promoting participation and International SOS, Mazars and Rabobank for additional material.





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SANTA FE  
RELOCATION

# REVISION

Mobility through the looking glass



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