VIALTO PARTNERS

The New Work Journey Survey

Mobility (R)evolution:

Redefining the mobility playbook

2023

Mobility evolution or revolution?

The COVID-19 pandemic undeniably brought about significant changes in the world of work—and the world of global mobility.

We wanted to understand whether companies are looking to **evolve their current mobility practices,** or if they are aiming to **revolutionize their approach** to mobility to meet the changing demands of their business and their workforce.

We're pleased to present insights from leaders at **199 global companies** who participated in our Mobility (R)evolution survey*. Each shared their perspectives on the direction that mobility is taking across key areas, including the fundamental **purpose of offering international work opportunities** at their company, through to the **scope** of the mobility team and policies, the **operating model**, and their focus on the **user experience**.

The survey results and the insights we gained are shared in this report. We hope you enjoy the read and look forward to discussing them with you!

Survey was open from March to May 2023 and shared globally

Contents

Global results

Re-build to meet new demands—strategic value on its way

The impacts of Covid-19, advancement of technologies, broadening scope of workforce mobility, increased focus by governments to track and share tax and immigration data—together with the benefits of offering more internationally flexible work patterns in the fight to attract, retain, and motivate talent—have combined to light a fuse on the evolution of global mobility. The goalposts of what is considered a 'foundational' Global Mobility program have shifted. Teams are grappling with new, stricter compliance rules, new 'non-traditional' employee 'move' types and an ask from business leaders to increase focus on the employee experience. The result? It all means that the foundations for mobility that were laid pre-2020 need to be rebuilt.

Today

39%

of companies state their top priorities for mobility are to **manage compliance** and **enhance mobility policies** (also 39%). **Aligning mobility with talent** is the 3rd top priority (26%)

OVER THE NEXT TWO YEARS

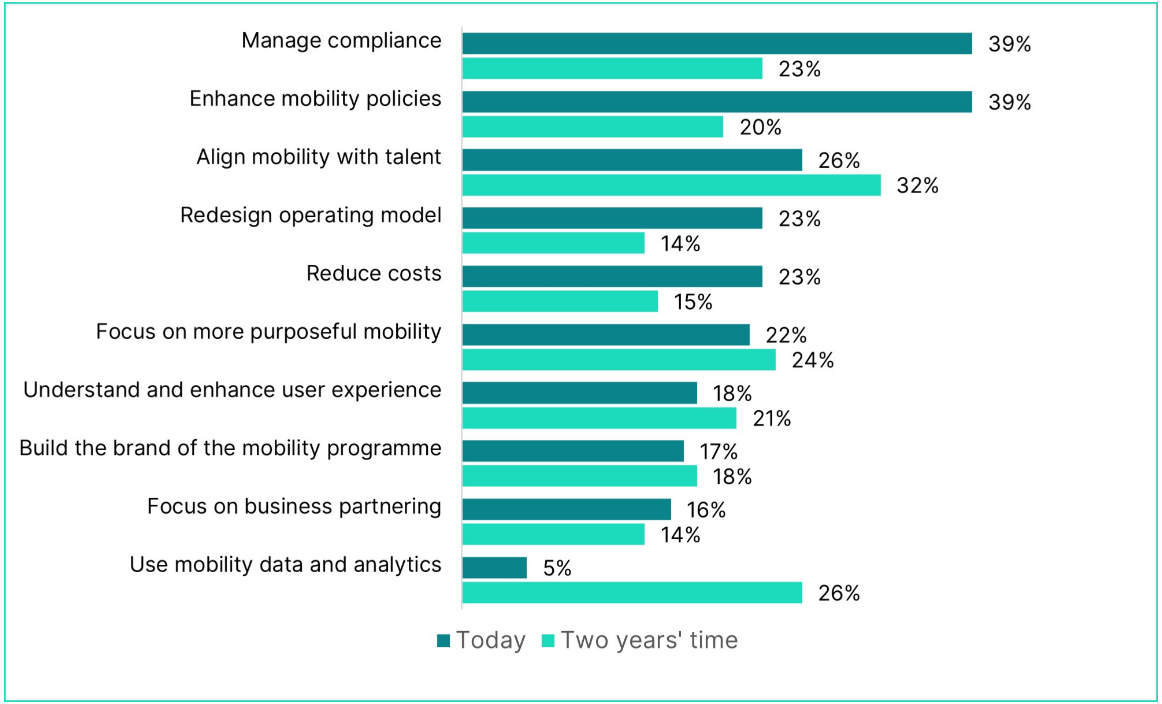
Companies' priorities are shifting, with plans to prioritize:

#1
aligning talent with mobility (32%)

#2
leveraging mobility data and analytics (26%)

#3
being more purposeful about mobility (24%)

Top ten priorities companies are focusing on now and in two years' time



Re-build to meet new demands—strategic value on its way (cont'd)

Pulse check—what's going on and what's planned?

We were not surprised that **keeping compliant** with workforce mobility remains top of mind for most companies; it's essential to maintaining the company's license to operate worldwide. Particularly as getting tax, immigration, and social security wrong can result in significant reputational and financial damage.

Enhancing mobility policies is also a top focus for companies right now. We're seeing these enhancements range from re-thinking the balance between high-tech and high-touch support for mobile employees, to enhancing flexibility in the package and benefits provided by giving more flexibility and discretion to the business, through to designing new policies for the newer types of international working (e.g. international remote working, virtual assignments, etc.).

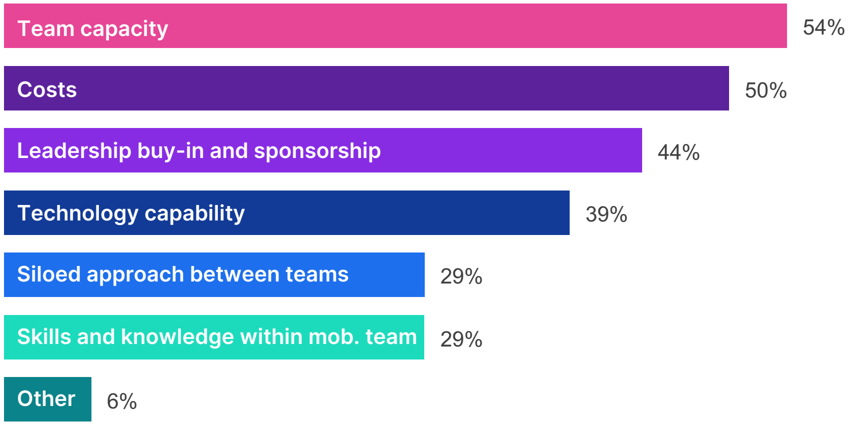
Looking ahead two years from now, **aligning talent with mobility** jumps to become the top priority. Many companies that we work with believe that their mobility programs can become **more purposeful**—but that input is needed from their Talent and Talent Acquisition teams. Why? Reasons include helping embed and promote the benefits of international experience on career development and professional networks, enabling international resourcing/recruiting so that roles can be filled by skilled people from within the global company, and helping prevent talented people from leaving the company as they feel it's often 'easier to leave, than to find a new role/work overseas with my current company'.

Interestingly, **using mobility data and analytics** to provide insights to business leaders is the second top planned priority for two years' time—jumping from 5% today to 26% in 2025. Having an integrated 'one source of truth' data platform is what we're seeing many companies set to be one of their key strategic goals, informing their short-term and tactical decisions made meantime, to achieve this ambition.

In order to deliver on these priorities, mobility teams need to push for and drive change. However, there is acknowledgment that the **capacity of the mobility team, investment costs and a lack of leadership buy-in** can all hinder delivery. So perhaps these are the right places to start focusing on.

Mobility teams could reconsider in-house tasks and explore the use of technology, process simplification, and vendors **to release capacity**. There's also a need to share a compelling **business case with leadership**—setting out the vision for how workforce mobility, done well, can enable the company to deliver better business performance and attract, engage, and retain top talent.

Main barriers for mobility teams to delivering their priorities



More international work opportunities, but fewer ‘expats’?

Many companies are moving away from primarily using traditional ‘expat’ assignments to move employees internationally, except for in very targeted situations (e.g. shorter-term moves, moves to challenging locations, and executive leadership roles). Companies now have more options within their mobility toolkit, often choosing to focus on international transfers (where pay is generally aligned with the host country). Also interesting is the rise of international remote working, virtual assignments, and international direct hires—perhaps opening up the opportunity for global exposure and building international experience and networks for many more of a company’s total workforce. These work arrangements can also be a key tool in attracting in-demand skills and talent to a company, as well as engaging and retaining the current workforce by providing opportunities to work more flexibly, and more internationally.

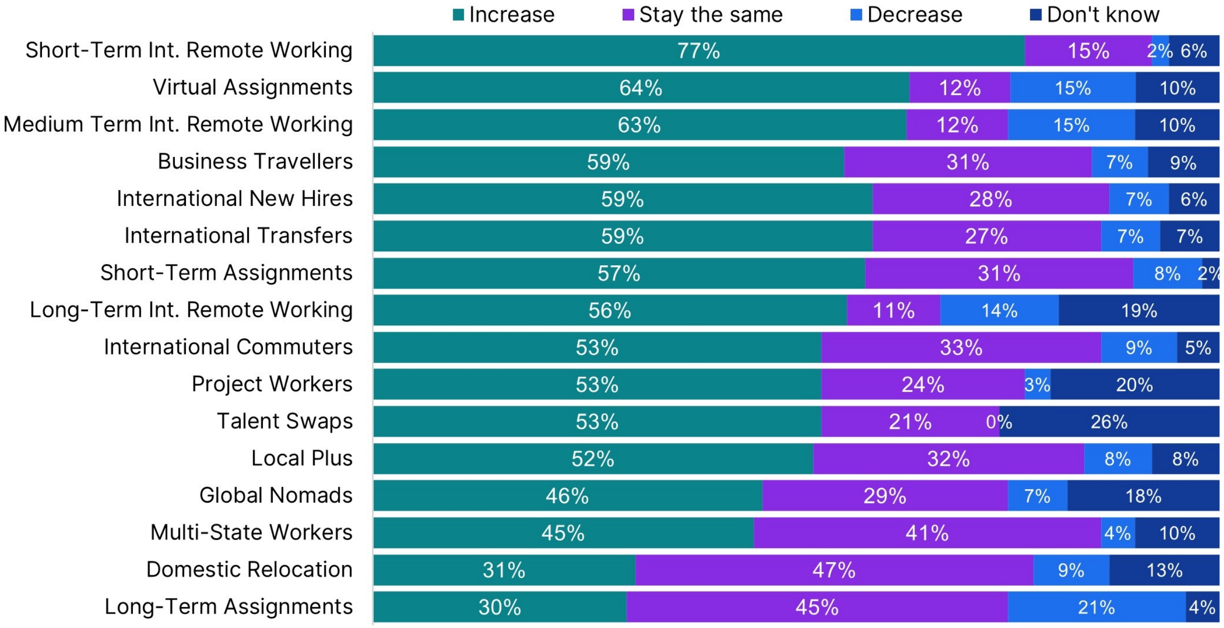
More ‘mobility’

89% of companies expect international work arrangements for their employees to increase. But the largest increases are expected to be in **short term** (77%) and **medium-term** (63%) **international remote working** and **virtual assignments** (64%), which don’t involve ‘moving’ at all.

These work arrangements bring a lot of **complexity** for companies to manage them compliantly—but equally, they can be a very effective tool in attracting, engaging, developing and retaining **talent**.

Conversely, more traditional **long-term expatriate assignments** are the top move type that most companies expect to decrease (21%), albeit 75% expect them to stay the same or increase. Given their cost, we’re seeing companies be much more targeted in their use of ‘expat’ deals.

Employee ‘move’ types expected to increase most over the next two years:



A spotlight on virtual assignments

Pulse check—what's changed?

Two years on from COVID-19, companies are **continuing to see employee demand for international remote working**, fuelled by a workforce eager to catch up on global travel and recognizing that traditional ways of working may no longer fit their new work and lifestyles. Employees are no longer just asking for flexibility—they are demanding it, and in the war for talent, offering international working can be a real differentiator.

Many companies have implemented **short-term international remote working policies** as a direct response—enabling individuals to prolong their holidays and/or spend more time with family in their home country.

Equally, many companies are grappling with how to deal with **medium-to-longer term international work arrangements**, with some employees questioning why they need to be based in a specific country where people go into the office infrequently or on certain days only. It's complicated...as tax legislation hasn't yet caught up with these more agile, global working patterns. In addition, in the case where individuals with rarely found skills or with senior positions ask to be based in a 'different' country to where the company expects, Mobility and Business leaders are grappling to find the 'right' response that retains top talent but also is workable for the company, the teams the individual works with, and is achievable from a compliance perspective.

And why the sudden **increased interest in virtual assignments**...?

Virtual assignments (an assignment, typically (but not always) for less than one year, where an individual works and lives in one country but works for and on behalf of another country full-time), are on the rise and expected to continue to increase (64% of companies expect their use to go up). Virtual assignments, often considered a cheaper solution to short term assignments, **enable the business to fill short-term resource or skills gaps** without the burden of moving someone internationally. They can also mean employees who are less mobile **have an opportunity to gain experience working with different teams or on different types of projects**, with their international colleagues. Perhaps they can be a 'win-win' for the business and the workforce—but, they can be less than straightforward to get right from a compliance perspective! Therefore, many companies are working to determine the right guardrails to put in place, to keep the company and the workforce compliant while offering new opportunities for talent and for internal recruitment and deployment.

While virtual assignments can be the right solution for the business and employees, **the purpose and the objectives of the virtual assignment need to be carefully considered**. The benefit from being 'on the ground', experiencing and working within different cultures and understanding ways of working is crucial to developing the global acumen businesses expect their leaders to have.

While the world of mobility is **embracing and taking ownership for virtual assignments** (47% of mobility teams now own virtual assignments), many of those likely to grow in frequency over the next two years are currently typically unsupported by policies.

TODAY

15%

of companies provide the business with options to utilize virtual assignments (of these companies only 21% have a policy in place to support this).

IN THE NEXT TWO YEARS...

55%

of companies plan to have a policy in place to support virtual assignments.

Finding the balance—operational vs. strategic?

For mobility teams to influence business and talent strategies, they need to have a robust operational set-up, strong partnership with Talent, and continuously evolve their program through obtaining feedback and leveraging data to ensure the needs of the customers (both the business and employees) are met. Unfortunately, our survey showed that over half of companies are still seen as being mainly compliance focused—meaning these companies are not unlocking the true strategic potential of having global workforce with a global talent pool.

Current perception of mobility teams by leadership

Pulse check—why is this important?

An effective global mobility program focuses on deploying the right people, in the right role, in the right location—often crossing international borders. But with this movement comes complexity and compliance risks. As regulatory and laws continue to evolve, and often increase in complexity, businesses and mobility teams need to ensure they manage risks and keep the company and mobile employees compliant.

Known as '**blockers**', mobility teams often have a **negative reputation within the company** and are known to present challenges rather than solutions. This, on some occasions, means that businesses seek solutions independently and mobility teams find out about cross border movement after the fact. Changing the perception of your mobility teams is necessary. Obtaining a pro-active role in the movement of people and becoming a trusted advisor will ensure a higher degree of oversight that mobility teams will need.

Mobility teams need to take initiative and drive the change by becoming strategic business partners and delivering on what the business wants and needs to achieve their ambitions. To do this, mobility teams need to:

- Work more closely with the business to understand their goals, ambitions, and strategies
- Focus on solution building to complex cross border arrangements
- Understand and deliver cost effective options
- Drive data-insights to help implement continuous improvement

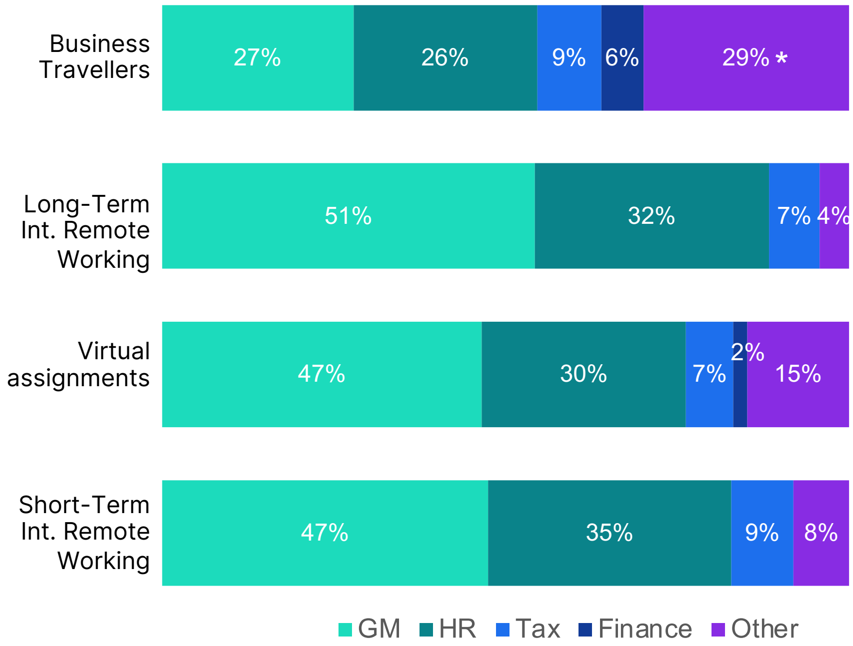
However in order to do so, **companies need to free up capacity for mobility teams**. While mobility is expected to only increase, operational efficiency by leveraging technology and vendors will be key to the success of the mobility teams.

A change in mobility scope—a change in service delivery

As mobility evolves, teams must handle a broader range of move types. Over **74% of companies today have a mobility team in place that owns traditional mobility move types** (e.g. long-term assignments and short-term assignments), often delivered through a global or regional global mobility model.

Our findings indicate that, in addition to the traditional move types, **nearly half of companies now also own virtual assignments (47%), short-term (47%), and long-term international remote working (51%),** all of which are expecting increases in number of moves.

Function owner of the top non-traditional move types



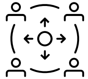
Pulse check—why is this important?

While there is a wide recognition that the number of moves and complexity of mobility are increasing, there is often no mention of changing the number of full-time employees (FTE) in the mobility team to support a larger population or the added skills, capabilities, and knowledge needed.

Knowing team capacity is a key concern for mobility teams. Increases in scope and numbers can only be perceived as daunting for many teams, that is unless their roles and how they deliver mobility can be reconsidered. Companies must reconsider how they deliver mobility and explore technology, vendors, and process improvements to increase efficiency.

With this increased change, many companies look to their vendors, leveraging their knowledge and capabilities and (often) technology. This brings the benefit that the investment requirement in upskilling and technology falls within the responsibility of the vendor.

23%



of companies expect more mobility activities to be **outsourced to a vendor**

46%

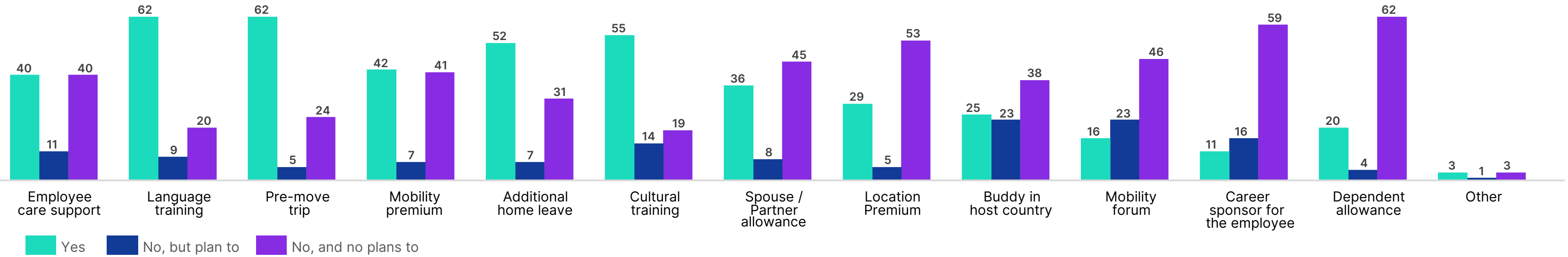
of companies look to increase the **use of technology**

**Other includes Business / Business centre / Business Travel team*

The shift towards a more human-centric mobility approach

In the shift towards a human-centric mobility approach, certain aspects have proven to make a crucial difference to the overall employee experience. Factors such as family integration, cultural awareness, networks, and a sense of welcome in the host country greatly influence the mobility experience. Unfortunately, these areas are often overlooked at present.

Key initiatives to provide a better employee experience



With an increased focus on costs, many companies look to reduce packages—often to the detriment of the ability of employees to settle in and the overall experience (e.g. reduced temporary accommodation, limited destination services support, etc.). However, many initiatives that support a stronger employee experience are at limited or no cost at all—just time. Previous research* showed us that more than half of companies who **allocated a buddy in host country** and **mandated cultural training** saw significant improvements to their employee experience. Implementing these initiatives are easy wins for any company, and since 2018, we are seeing more companies implement these initiatives (buddy in host country grew from 16% to 25%, and cultural training from 27% to 55%).

Family plays a deciding factor

62%

Of companies indicate **potential negative impact on family** life as a key barrier

Certainly, the role of the accompanying (or stay at home) family throughout the mobility lifecycle, must not be underestimated. The top 3 key barriers for employees to not take up an international opportunity are family related. However, less than 7% of companies focus and measure the experience of the wider family.

With dual-career families being an increasing demographic within companies, and therefore mobile population, the need to understand and cater for families will be key to ensuring moving internationally will be an attractive and positive experience for the employee.

Modern Mobility Survey, 255 participants

Feedback—often received but rarely actioned

Pulse check—why is this important?

Often many companies don't know where to start or what to prioritize when looking to improve the employee experience.

For companies looking to reimagine their mobility program, policies, or processes, taking a 'pulse check' could be an **easy and practical starting point**—a way to understand the overall experience (and challenges and concerns) their mobile employee and family might be facing.

However, this is often easier said than done. While the majority of companies currently obtain feedback from their employees—only **23% of companies** state they currently actually use the feedback from mobile employees to make changes.

Understanding the current state of your mobility program—including your main pain points, barriers, and elements that work well—will enable companies to **prioritize the changes** that have the biggest impact on their mobile employees and the business.

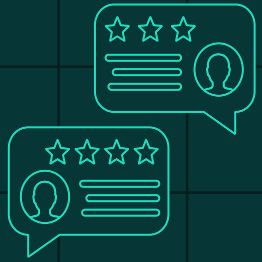
Frequency and type of feedback obtained across key stakeholder groups

81%

of companies obtain **feedback from their employees—**either at specific stages (48%), monthly (45%), quarterly (12%), or yearly (17%)

23%

of companies use feedback from mobile employees **to make enhancements** to their mobility program



ONLY 10%

of companies obtain **feedback from the employee after 6 months** post-assignment

~50%

of companies state they **never obtain feedback from key stakeholders** such as, line managers (56%), strategic business leaders (48%), and talent (69%)

Repatriation—the 'nut to crack'

Imagine the scenario: an employee has spent, let's say, five years working abroad, picked up new skills, had an amazing experience and developed a whole new daily routine. Then comes the time for them to return to their home country and perhaps back to the same role as before.

However, are businesses recognizing that this return can be quite emotive and disruptive to the individual and their family? How can the business ensure there is successful reintegration and that the investment they made is capitalized on?

Key initiatives companies are undertaking to improve the repatriation process

REPATRIATION SUPPORT IS KEY

ONLY

38%

of companies have a plan in place for role upon repatriation at least six to 12 months in advance. This, however, is an increase from recent surveys. But not enough...

56% of companies state that the **uncertainty of the return role** is a key barrier companies need to overcome to ensure international mobility remains attractive to their people.

Often simple changes in process, pro-active planning, and guidance go a long way in driving a better repatriation experience.

Repatriation—the ‘nut to crack’ (cont’d)

Pulse check—why is this important?

Previous assignees can become a company’s **biggest advocates** for global mobility experiences, however equally, they can easily become **detractors**.

Repatriation is the final piece of the mobility experience, and unfortunately is quite often the neglected part. we have seen this be the case due to:

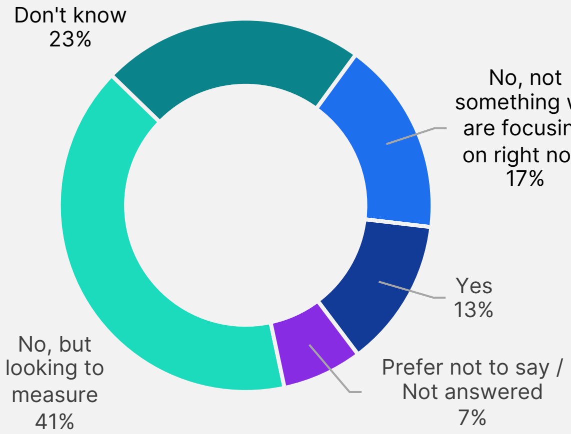
- **Unclear ownership** as to who supports the assignee during repatriation
- **No defined role** upon their return
- Lack of awareness of **reverse cultural shock**
- Minimal forward planning in relation to their **overall career path**

The longer someone is working aboard, the more embedded they become in that way of life. Upon their return home, they would have changed as a person. They may have developed more cultural awareness and/or picked up new skills for example, but upon their return everything and everyone may be the same—or to the contrary—be unrecognizable. To aid employees with this shift, we recommend additional support via reintegration guidance for the business, the employee, and their family. Currently only ~20% of companies provide reintegration guidance.

we have also heard instances of people returning to their home offices and **‘walking the corridors’** because they were waiting for a role to become available. At this point in time, they are no longer under the care of Global Mobility (as their assignment has ended), however, this experience of being forgotten has a negative impact on the brand of Global Mobility.

Often these individuals without a sense of purpose or role leave the firm after a short period following their assignments. while it seems to be a common known fact, only limited number of companies seem to understand and measure the impact. That, however, it expected to change with more companies focusing on measuring the success of their mobility program, including return on investment in the long run.

Companies who measure the percentage of mobile employees who leave the company within two years post assignment



What stood out to us

What stood out to us in the Energy, Utilities, and Mining ('EUM') industry

21 EUM companies (incl. Oil and Gas, Renewable energy, Power and Utilities, Mining and Metals) took part in the survey. We have set out below key statistics that stood out to us and where your industry differs against the global results across the different focus areas.

Operational focus at the potential expense of employees

57%

Compared to 44% Global results

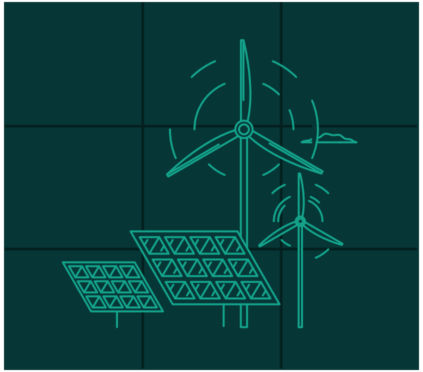
of EUM companies state they are predominantly operational and compliance focused—with only 14% of EUMs focusing on employee needs (compared to 28% global).

Changing the focus to support employee and their families

33%

Compared to 17% Global results

of EUM companies are looking to change policies to offer more family support. This could be a response to recognizing the importance of family impact on mobility decisions.



Hybrid operating model

38%

Compared to 15% Global results

of EUM companies currently have a hybrid global mobility support model, with only 14% stating they have a global support model (compared to 46% globally).

Moving the right people into the right roles, purposefully

10%

Compared to 17% Global results

of EUM companies state they always move the right people into the right role suggesting a less strong alignment with talent than other industries (only industrial industries had a lower %).

International experience in C-suite is key

24%

Compared to 6% Global results

of EUM companies state more than 90% of their executive and/or c-suite have had international experience, and 57% (compared to 55% global) say leadership champions the benefits of international experience.

Additional support to incentivize employees

90%

Compared to 62% Global results

of EUM companies offer **pre-move trips** to the host location to incentivize employees—additional support such as mobility premiums (67%), additional home leave (76%) are offered more frequently than other industries.

What stood out to us in the Professional Services ('PS') industry

18 PS companies (incl. Professional Services, Recruitment, and Legal) took part in the survey. We have set out below key statistics that stood out to us and where your industry differs against the global results across the different focus areas.

Greater focus on operating model redesign

35%

Compared to 14% Global results

of PS companies state that the operating model is one of their top priorities for today, with lower focus on managing compliance compared to other industries.

Cost is not considered a main barrier

38%

Compared to 50% Global results

of PS companies state that cost is a barrier to achieving their priorities—only the 4th highest barrier (compared to the 2nd highest barrier globally).

Mobility initiatives to support DE&I

0%

Compared to 13% Global results

of PS companies state they have diversity initiatives in place in their mobility program. This is surprising given the impact of DE&I across the industry.

Moving the right people into the right roles, purposefully

28%

Compared to 17% Global results

of PS companies state they always move the right people into the right role—this is the highest percentage against all other industries.

Level of support offered not considered sufficient

39%

Compared to 26% Global results

of PS companies state the perceived support companies offer for assignments is a main barrier to the uptake of international assignments—higher than most industries.

Moving towards the outsourced model

28%

Compared to 12% Global results

of PS companies expect to move more of their activities offshore. Equally, the use of an outsourced provider is expected to increase more in PS than other industries.

What stood out to us in the Healthcare ('HS') industry

9 HS companies (i.e. Healthcare, Pharmaceuticals & Life Sciences) took part in the survey. We have set out below key statistics that stood out to us and where your industry differs against the global results across the different focus areas.

Building the brand of mobility is a key priority

67%

Compared to 17% Global results

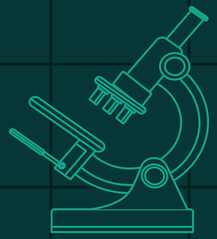
of HS companies stated one of their key priorities is to build the brand of mobility, but that the siloed approach between teams is a main barrier (56% compared to 29% globally).

Regional approach to operating models

44%

Compared to 14% Global results

of HS companies structure their global mobility model with regional hubs, compared with 33% who have a global model with a central hub in place.

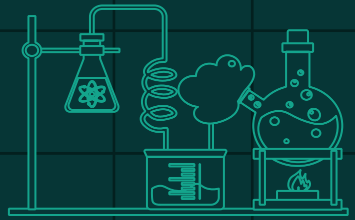


Moving the right people in the right roles—purposefully

71%

Compared to 39% Global results

of HS companies state clear objectives for employees are set at the start of an international assignment.



Offering cultural training to support employees

78%

Compared to 19% Global results

of HS companies provide cultural training as a benefit to their mobile employees to support the assignment, employees, and their accompanying family members.

Reporting on key metrics

88%

Compared to 70% Global results

of HS companies state they report on key metrics of the global mobility program, with 71% stating they have the right data to manage their mobility program (compared to 54 globally).

Sustainability in the future

67%

Compared to 37% Global results

of HS companies plan to assess the sustainability impact of their mobility program within the next two years.

What stood out to us in the Consumer Goods and Services ('CGS') industry

32 CGS companies (i.e. Retail, Consumer and Wholesale goods, Hospitality and Leisure, Travel, Transport and Logistics, Forest, Paper and Packaging) took part in the survey. We have set out below key statistics that stood out to us and where your industry differs against the global results across the different focus areas.

Aligning mobility with talent

31%

Compared to 26% Global results

of CGS companies state aligning mobility with talent is a key priority today—currently only 19% of CGS state they are perceived to be integrated with talent.

Virtual assignments—not for everyone

0%

Compared to 55% Global results

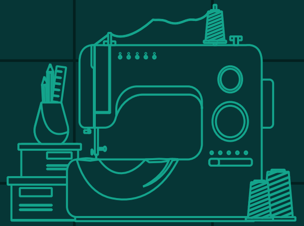
of CGS companies state they have in place a virtual assignment policy—with almost 67% of companies stating they do not plan to implement one either (compared to 55% globally).

Use of technology to support employee experience

56%

Compared to 44% Global results

of CGS companies state they don't use technology to drive employee experience. This is predicted to change in two years time with only 13% of companies expected to be in this position.



Simplify and communicate the policies

63%

Compared to 48% Global results

of CGS companies state the key change they intend to make to their policies is to simplify and change how they are communicated.

Moving the right person into the right role, purposefully

22%

Compared to 17% Global results

of CGS companies state they move people into the right roles at the right time to support talent strategies.

Repatriation guidance for employees

34%

Compared to 21% Global results

of CGS companies provide guidance to employees to drive a more successful repatriation with 23% tracking and reviewing the success of an assignment (20% globally).

What stood out to us in the Industrial Products and Services ('IPS') industry

32 IPS companies (i.e. Automotive, Industrial Manufacturing, Business Services, Chemicals, Engineering and Construction) took part in the survey. We have set out below key statistics that stood out to us and where your industry differs against the global results across the different focus areas.

Focus on creating a stronger alignment with talent

50%

Compared to 32% Global results

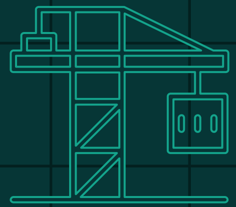
of IPS companies have building a stronger alignment with talent as their top priority for the next two years—today only 13% of IPS companies are perceived integrated with talent (compared to 18% globally).

A continued focus on physical moves

ONLY **20%**

Compared to 64% Global results

of IPS companies expect to increase the number of virtual assignments. Today 0% of IPS companies have a virtual assignment policy in place (compared to 21% globally).



Measuring success of assignments

22%

Compared to 13% Global results

of companies can measure the percentage of mobile employees who leave the company within two years of the end of their assignment.

Moving the right person into the right role, purposefully

3%

Compared to 17% Global results

of IPS companies state they always move the right people into the right role suggesting the least strong alignment with talent currently than other industries.

Focus on building policies for non-traditional moves

63%

Compared to 40% Global results

of IPS companies are looking to create policies for non-traditional mobility types, especially for the new mobility types needed: Short-term international remote work (31%), commuters (29%) and talent swaps (25%).

Smaller in-house mobility teams

≤4 FTE

Compared to up to 25 FTE globally

The majority of IPS mobility teams have <1 full time employee supporting their mobility program. 28% of companies have between 50%–71% of their activities delivered by an outsourced provider (23% globally).

What stood out to us in the Financial Services ('FS') industry

29 FS companies (i.e. Financial services, Asset and Wealth management, Banking and Capital markets, Insurance, Real Estate) took part in the survey. We have set out below key statistics that stood out to us and where your industry differs against the global results across the different focus areas.

Increased focus on cost within the FS industry

31%

Compared to 23% Global results

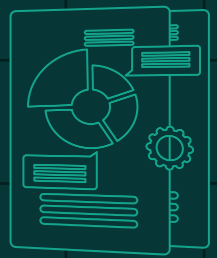
of FS companies indicate that the reduction of cost of their mobility program is the third highest priority. 72% of FS companies also suggest cost is the main barrier to achieving priorities.

The rise of virtual assignments policies

75%

Compared to 55% Global results

of FS companies are looking to create a policy for virtual assignments. All companies expect this move type to increase but no FS company has a policy in place (compared to 21% of global results).



Mobility as a tool in the war for talent

61%

Compared to 47% Global results

of FS companies (strongly) agree that international experiences are offered to attract and develop talent. 40% of FS companies suggest this is a prerequisite for promotion into senior roles.

Driving the DE&I agenda

24%

Compared to 13% Global results

of FS companies put interventions in place to support the diversity of their mobile population. Within FS, on average, 20% of mobile population are female, compared to 15% globally.

Leveraging offshore resources

83%

Compared to 44% Global results

of FS companies use offshore resource to deliver mobility activities, typically supporting up to 25% of the overall process.

Quantifying the cost of mobility programs

61%

Compared to 37% Global results

of FS companies state they are able to quantify the cost of their mobility program. Given the focus on cost as a priority, the need for mobility teams to track costs is unsurprising.

What stood out to us in the Tech, Media, and Telecoms ('TMT') industry

37 TMT companies (i.e. Communications, Entertainment and Media, Technology) took part in the survey. We have set out below key statistics that stood out to us and where your industry differs against the global results across the different focus areas.

Aligning mobility with talent: a key focus

38%

Compared to 26% Global results

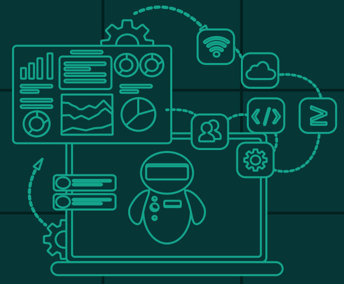
of TMT companies state alignment with mobility is a key priority today (second to managing compliance). This is higher than average, with the majority of companies only looking at this in the next two years.

Need for data analytics to increase in the next 2 years

43%

Compared to 26% Global results

14% of TMT companies focus on using mobility data today (compared to just 5% of the global results). Tracking such data will become vital to measure ROI and to help make key strategic decisions.



Leadership buy-in a challenge

54%

Compared to 44% Global results

of TMT companies state that the 2nd highest barrier (apart from cost) is obtaining leadership buy-in. For the majority of industries, the barriers are more focused on team capacity.

Reduced in-house support across the lifecycle

34%

Compared to 25% Global results

Of TMT companies expect a decrease in in-house mobility activities. Currently 63% of companies state in-house teams deliver over 50% of all mobility activities (compared to 38% globally).

Advance repatriation planning to support a better experience

47%

Compared to 18% Global results

of TMT companies state they plan for repatriation at least 6–12 months in advance. Yet, 75% of TMT companies still state the uncertainty of return roles is holding employees back from taking up assignments (compared to 56% globally).

Provide more flexible mobility policies

ONLY 3%

Compared to 17% Global results

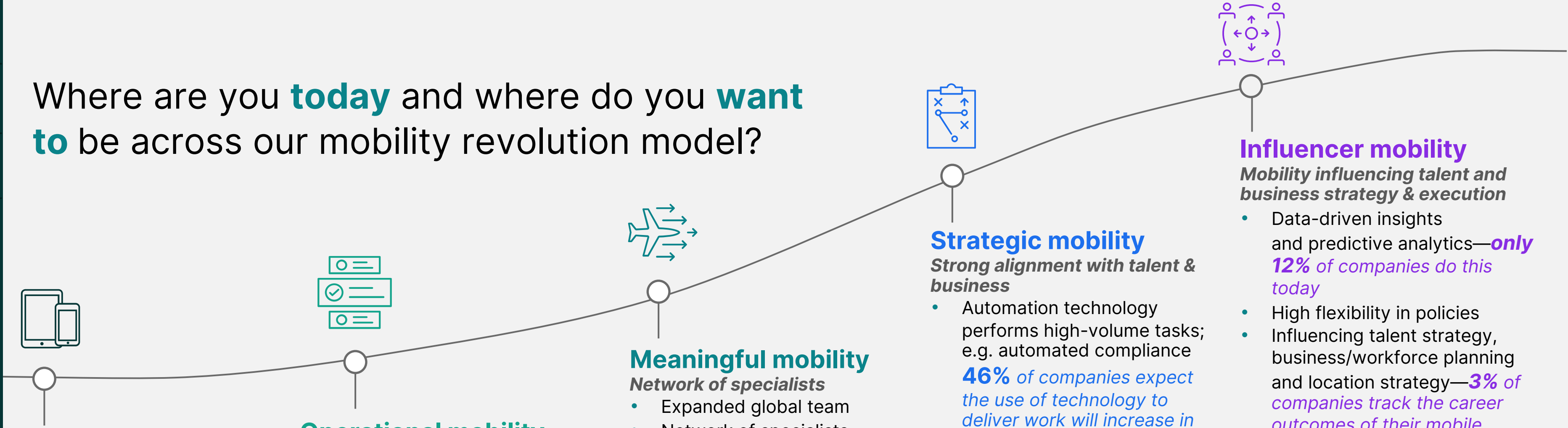
of TMT companies state they always move the right people in the right roles, significantly lower than any other industry, with the majority (59%) saying they do so sometimes, but only by chance.

What’s next

Looking ahead—take a moment to reflect on your mobility program

From our research, it is clear that the **role of mobility is changing**, whether leaders are looking to build on the foundations (evolve) of their mobility program or revolutionize the program and model more broadly. Companies have an opportunity to reflect on what they want and need from mobility, and transform accordingly to maximize the value the business and the workforce get from the mobility program.

Where are you **today** and where do you **want to** be across our mobility revolution model?



Reactive mobility

Siloed, reactive, ad hoc team

- No true mobility function—*9% of companies have local mobility teams*
- Ad hoc and isolated
- Reactive
- High cost with very little consistency

Operational mobility

Limited collaborations

- Centralized team—*46% of companies have a global operating model*
- Limited collaboration between internal functions and/or partnering with external vendors
- Select efficiencies
- High level of exceptions

Meaningful mobility

Network of specialists

- Expanded global team
- Network of specialists—relocation, tax, immigration, social security, etc.
- Separate roles between business advisory and administrative services
- A holistic human-centric approach *21% of companies state understanding and enhancing the user experience is a top priority in the next two years*

Strategic mobility

Strong alignment with talent & business

- Automation technology performs high-volume tasks; e.g. automated compliance *46% of companies expect the use of technology to deliver work will increase in the next two years*
- Amalgamation of multiple data points to evaluate performance and risk; e.g. travel & remote work planning
- Strong alignment with talent—companies want to move the right people into the right roles to enable the business and support the EVP—*only 17% of companies do this today*

Influencer mobility

Mobility influencing talent and business strategy & execution

- Data-driven insights and predictive analytics—*only 12% of companies do this today*
- High flexibility in policies
- Influencing talent strategy, business/workforce planning and location strategy—*3% of companies track the career outcomes of their mobile employees for a period of years*
- Continuous evolution with advancements in data and computer science; e.g. time to deploy predictions, ESG impact, diversity, Co2 impact, predicting assignment success—*only 14% of companies put in place interventions to increase diversity of mobile employees*

Company respondents

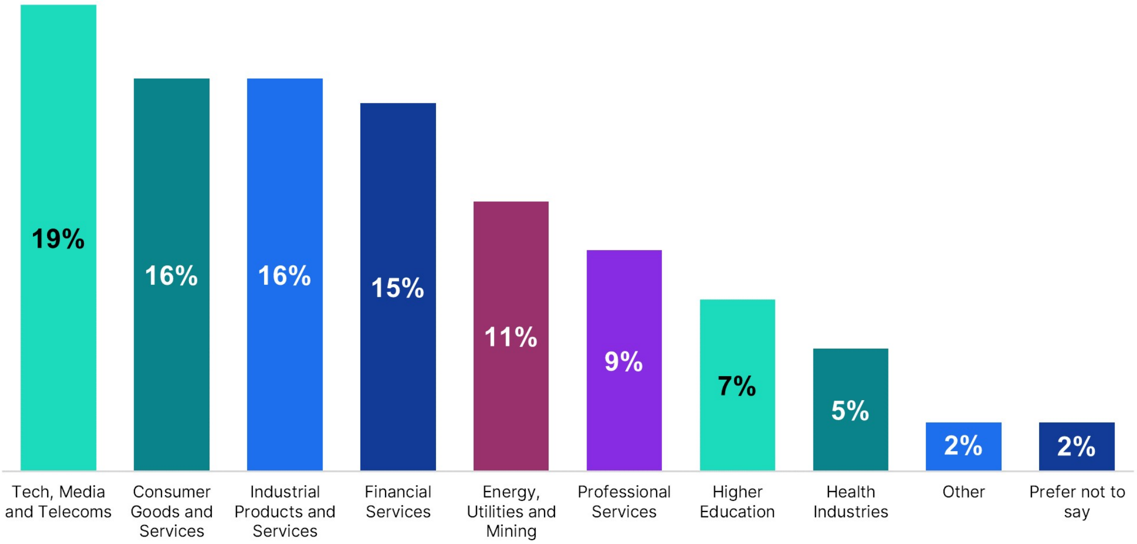
Overview of the company respondents

199 Company respondents

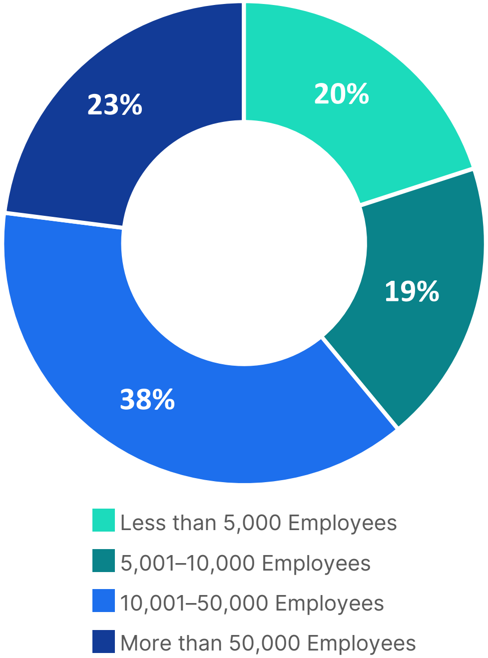
14 Industry sectors

28 Respondent countries

Breakdown of respondents by industry



Breakdown of respondents by company size



Respondent locations

Top HQ locations among respondents:

#1	United States
#2	United Kingdom
#3	Australia
#4	The Netherlands
#5	China
#6	Germany
#7	Switzerland
#8	Japan

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