




Assessing the predicted 2018 global mobility trends and their continued impact in 2019

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Introduction

As the old year closes out and a new one starts it is often a time when we look back and reflect on the challenges, achievements, joys and pains of the previous twelve months. This is true in business as well as our personal lives, and affords us the opportunity to cast our minds back to the predictions and trends of the last year and to assess the level to which they impacted then, and continue to play out in 2019.

In this publication we focus on three key trends that we believe will continue to impact in 2019. Each is a product of the digital disrupters, talent models and socioeconomic forces which continue to shape the future of work.

Before we dive in, let's remind ourselves of what we mean by 'the future of work' and how it relates to global mobility.

Driven by accelerating connectivity, new talent models, and cognitive tools, work continues to change. As robotics, AI, the gig economy and crowds evolve and grow, jobs are being reinvented, creating the 'augmented workforce'. This requires employers to reconsider how jobs are designed and work to adapt and learn for future growth.

We often focus on the impact of technology when considering the future of work, but we need to look beyond technology, drawing in the impact of changing demographics and careers. Only by understanding the connections and interdependencies across all of these dimensions can we understand what we need to do to prepare for it.

This isn't about tweaking talent strategies, or changing a few job roles. This is about fundamentally reimagining work as we know it today. Considerations include how work is delivered, how business is organised, how people experience work and how work is enabled.

Why is the future of work important to global mobility?

Organisations are continually looking towards their global talent pool in order to create a dynamic, futureproofed workforce that will provide them with the competitive advantage and flexibility to address the everchanging external landscape.

Based on the 2018 Deloitte Human Capital Trends Survey which included over 11,000 business and HR leaders across 124 Countries, 68% of organisations agree that a mobile workforce was an enabler of business and talent strategies¹. Yet, only 5% consider themselves as 'world class' in managing such a population, which means that for many organisations there's still a long way to go to bridge this gap.



68%

of organisations agree that a **mobile workforce** is an enabler of **business and talent strategies**



5%

of organisations consider themselves '**world class**' in managing their **mobile population**

Source: 2018 Deloitte Global Human Capital Trends Survey

Organisations today are increasingly judged on the basis of their relationships with their workers, customers and communities, as well as their impact on society². This dynamic results in a need for global mobility to 'up its game' and create a stronger brand that boosts performance of global employees, entices more employees to move globally and generates a higher organisational return on talent investment. Employees expect more, while businesses expect better ROI and retention from global moves.

Over the last 12 months, we have seen a huge shift in mindset across many leading organisations, recognising that a positive global mobility programme expands beyond just the mobility team. Shared ownership and collaboration between all stakeholders and vendors is essential in order to embed a world class mobility service.

Let's take a look back at some of the Global Mobility trends from the last year and how they will continue to make an impact in 2019.

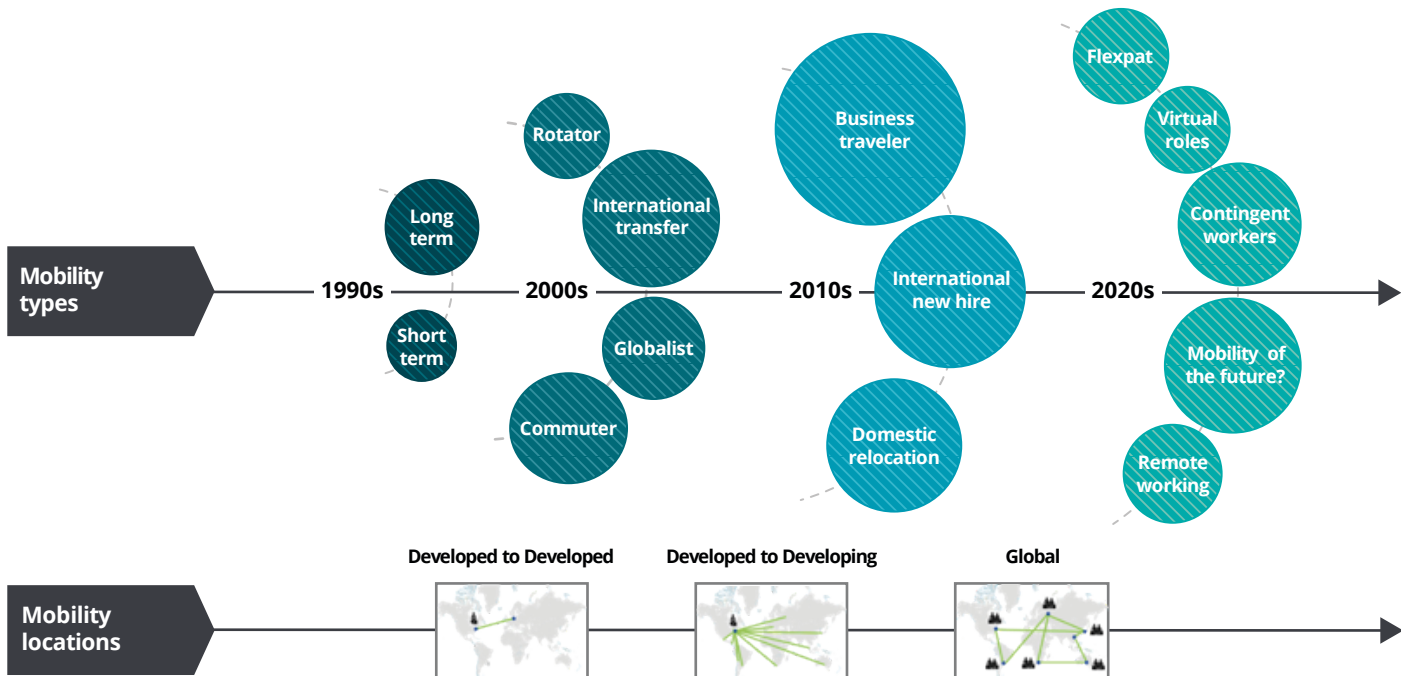
1. 2018 Deloitte Global Human Capital Trends Survey

2. 2018 Deloitte Global Human Capital Trends Survey

Trend 1: Global mobility will continue to diversify

Mobility today includes a broader array of employee types and a multitude of locations, with numerous talent traffic lanes. This has driven the need for closer alignment between move types and support levels, as well as more flexible and agile service delivery models that meet the requirements of a changing, diverse population.

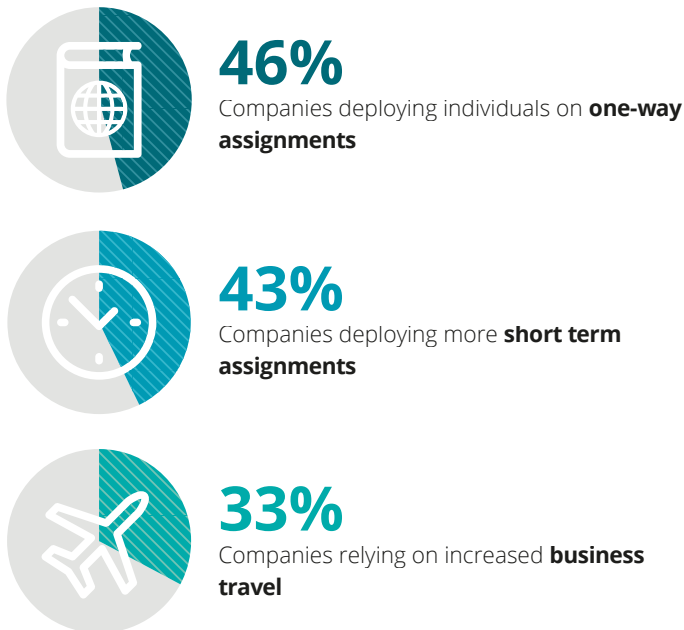
The graphic below shows an example of the evolutionary path of mobility types from the more traditional, formal 'assignment packages' to the range of more flexible options that have become available over time. We have also provided an illustrated example of the variations in move types over time.



Continued Impact

The last year saw continued flexibility in approaches related to global mobility service delivery and policy, adapting to the diversity of moves and employee requirements.

The top three growth policies in 2018 were³:



While traditional policy-based fixed mid and long term assignments remain an important and often used relocation model, the deployment of shorter and more flexible approaches, such as short term policies, business trips, immersive experiences and commuter models, continue to gain traction. Moreover, it is evident that cost conscious organisations with sufficient talent pools 'in-country' are turning to domestic relocations and external local hires to meet skills gaps.

Organisations are also increasingly utilising technology to mitigate the need to physically move people across borders with the availability of improved realtime communication tools, video conferencing and in some cases even AR (Augmented Reality) being harnessed to support 'virtual teaming', a trend that we will see continue to rise in 2019.

In addition to the diversification of talent, global mobility's scope is diversifying. 2018 saw an increase in activities that were supported or led by the global mobility function, including international recruitment, global workforce planning and location strategy. We believe that this trend will continue in 2019. These additional responsibilities will continue to reinforce the role that global mobility plays as a strategic business partner, talent enabler and employee coach.

Trend 2: Global mobility will become more human-centric

Employers are becoming more employee-centric in designing and operating their mobility programmes. Central to this is providing a personal experience whereby the employee feels that their needs are at the centre of the equation, rather than secondary to corporate policy. We believe this trend will continue to be at the forefront in 2019.

Enhancing the employee experience remains critical to success in this area, being voted the top strategic priority by mobility professionals⁴, with over 80% of executives rating employee experience as ‘important’ or ‘very important’⁵.

What does it mean to 'humanise' global mobility?



Putting **people** at the centre of the mobility experience



Mobility is **more personal** than other aspects of the talent lifecycle



Designing the **experience** around the person moving

For employees, this has meant a heightened focus on wellbeing, development and recognition. At the same time there has been a mindset shift in the way employees perceive global mobility. Where compensation was previously seen as the primary incentive for global moves, a human-centric global mobility experience needs to engage the individual and provide validation on both a personal and professional level. A personalised, agile, holistic experience is essential to attracting, motivating, and developing the global workforce, and will typically result in improved engagement between employee and employer.



Mobility as compensation **Incentive**



Mobility as benefit **Enabler**



Mobility as relationship **Engager**

4. 2018 Deloitte Future of Mobility Survey
5. 2018 Deloitte Global Human Capital Trends Survey

Continued Impact

Organisations who have experienced success in designing a humancentric global mobility programme haven't simply considered employee needs, but have also taken into account the endtoend experience for all stakeholders involved, including the business, HR, vendors and the global mobility function itself. By engaging with all stakeholders early in the process, employers can gain a more rounded understanding of what 'good' employee experience means and the role that each stakeholder can play in delivering on that objective. Often this engagement can unearth process and experience improvements for these other stakeholders too.

Although this particular trend has been high on the priority list of many employers, it is often difficult to break out of the daytoday operational aspects of running a busy mobility programme to focus on it.

We believe that a problem solving philosophy using design thinking methodologies which focuses on people will create offerings that are intuitive and deliver value; key in cultivating an irresistible mobility experience.

We predict that employee experience and embedding a humancentred global mobility programme will continue to be a key priority focus area for many leaders in 2019. In our view, organisations who wish to address and improve employee experience successfully should focus on four core aspects within their design, including operational support, personal wellbeing, professional engagement and financial welfare. It is critical that these four aspects should also be continuously measured to validate enhancements.



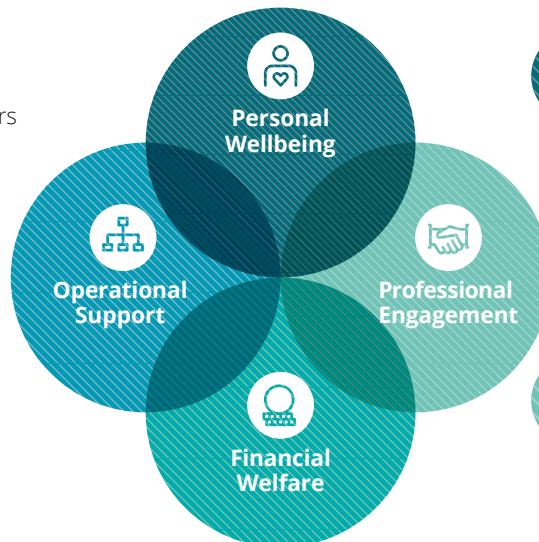
Operational Support

Structure of operations, and satisfaction with external vendors



Financial Welfare

Rewards, benefits and other support provided to the employee



Personal Wellbeing

Employee resilience, and focus outside of work life



Professional Engagement

Successful integration into the host location, and career progression

Trend 3: Making the global mobility function digital

Global mobility by nature is complicated, distributed, and expensive. Mobility data is being exchanged at a greater frequency and across more jurisdictions than ever before, with regulatory uncertainty presenting hurdles in compliance.

As the world embraces the future of work and exponential technologies, and open talent options continue to expand and extend work, companies have the opportunity to completely rethink their global mobility programmes, whilst simultaneously embedding digital processes within the organisation.

Mobility and Automation



42%

believe that **AI will be widely deployed** in the **next 3-5 years**

Mobility and Collaboration Tools



71%

believe **new communications tools** improve their **personal productivity**

Mobility and Data Analytics

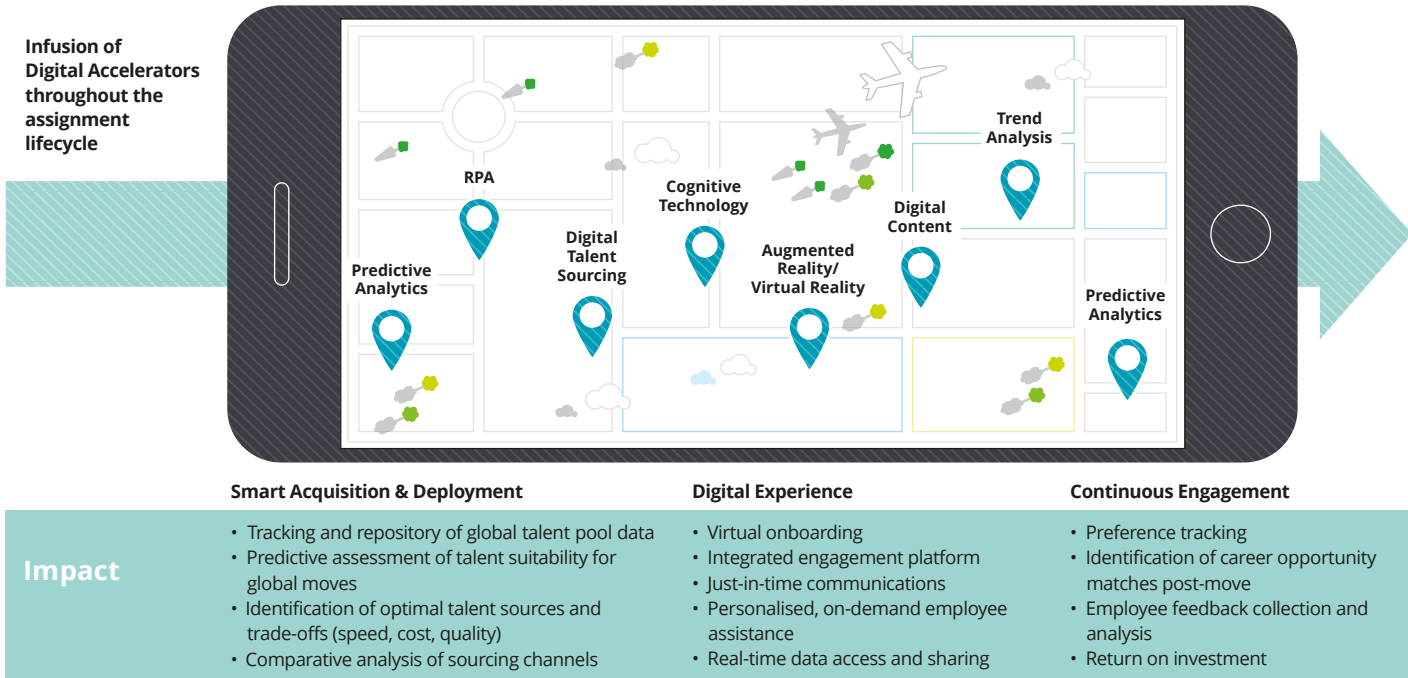


70%

are in the **midst of major projects** to analyse and **integrate data into decision making**

True pioneers are radically transforming mobility digital architecture and related processes to maximise the value for both organisations and the individual:

- **Digital accelerators** can be infused throughout the mobility lifecycle to help solve a specific need and change the way things are done
- **Stakeholder convergence** enables the elimination of silos and creates a coordinated digital ecosystem by enhancing crossfunctional collaboration
- **A digital platform** enables assignees, as well as internal and external stakeholders, to experience and manage the overall endtoend lifecycle more seamlessly



Continued Impact

Digitisation (moving to more digital formats) and Digitalisation (strategically shifting to digital processes and activities) of the mobility function have been a major focus for many organisations over the last twelve months and we believe this will continue to be very high on the list of priorities in 2019.

Activity of course depends upon the organisation in question and where it, and the mobility programme therein, sits on the digital maturity scale. At one end of the spectrum, mobility teams are deploying simple digital proof of concepts, for example, using

robotics to automate simple but repetitive manual tasks ('Exploring digital'). At the other end, some mobility functions are actively planning or deploying a formal digital strategy ('Becoming or being digital').

Be under no illusion, the age of 'digital mobility' is upon us. RPA, AI, AR are all actively being used in the global mobility space today. Just as we continue to adapt to the evolving augmented workforce, we are also witnessing the embryonic stages of the 'augmented mobility function'. Watch this space!

Resolutions for Global Mobility

There is no doubt that in the last 12 months the trends discussed have started to truly infiltrate global mobility and enhance capabilities and services. The future of work is of course evolutionary – changes and enhancements do not start and stop within a finite twelve month period – thus the diversification, human-centricity and digitalisation of mobility services will continue apace and no doubt morph into new areas of service and application during 2019 and beyond.

New themes and trends will emerge, some anticipated, others perhaps unknown at present. As we contemplate the year ahead we start to consider objectives and ambitions for the next twelve months.

For us at Deloitte, the focus will be on adopting a refreshed mindset that will enable us to continually challenge the way we approach our work, guided by the three key principles:



Design led – changing the way we view business challenges by ‘falling in love’ with the problem not the solution, and having a relentless focus on the end-to-end experience for all users



Data driven – proactively gathering even wider and more diverse data sets regardless of quality, with a view to moving towards predictive cognitive modelling and impactful organisational insights



Digitally enabled – having an unbounded curiosity to explore and constantly reimagine the ‘art of the possible’ by infusing digital accelerators throughout everything we do

More generally, here are some other suggested goals for 2019 that global mobility professionals may wish to consider:



Learn something new. This doesn't have to be directly related to your day job, but could perhaps be applied to the global mobility world



Talk to your stakeholders (the business, HR, employees) regularly – get to really understand the key moments that matter to them



Network with colleagues outside of your immediate team and peers outside of your organisation. Don't underestimate the value of knowledge sharing



Focus time on thinking about your own personal objectives as well as the overall objectives for your mobility programme



Dare to dream, and be bold! What would you do to reimagine your programme if time, resources, money were no issue?



Develop a roadmap for 2019, in line with this ultimate vision. Plan for short, medium and long term deliverables and benefits



Promote global mobility regularly and consistently among the wider business, HR and employees – be proud of your achievements, and celebrate success!



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