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Global Mobility Trends

Autumn 2021

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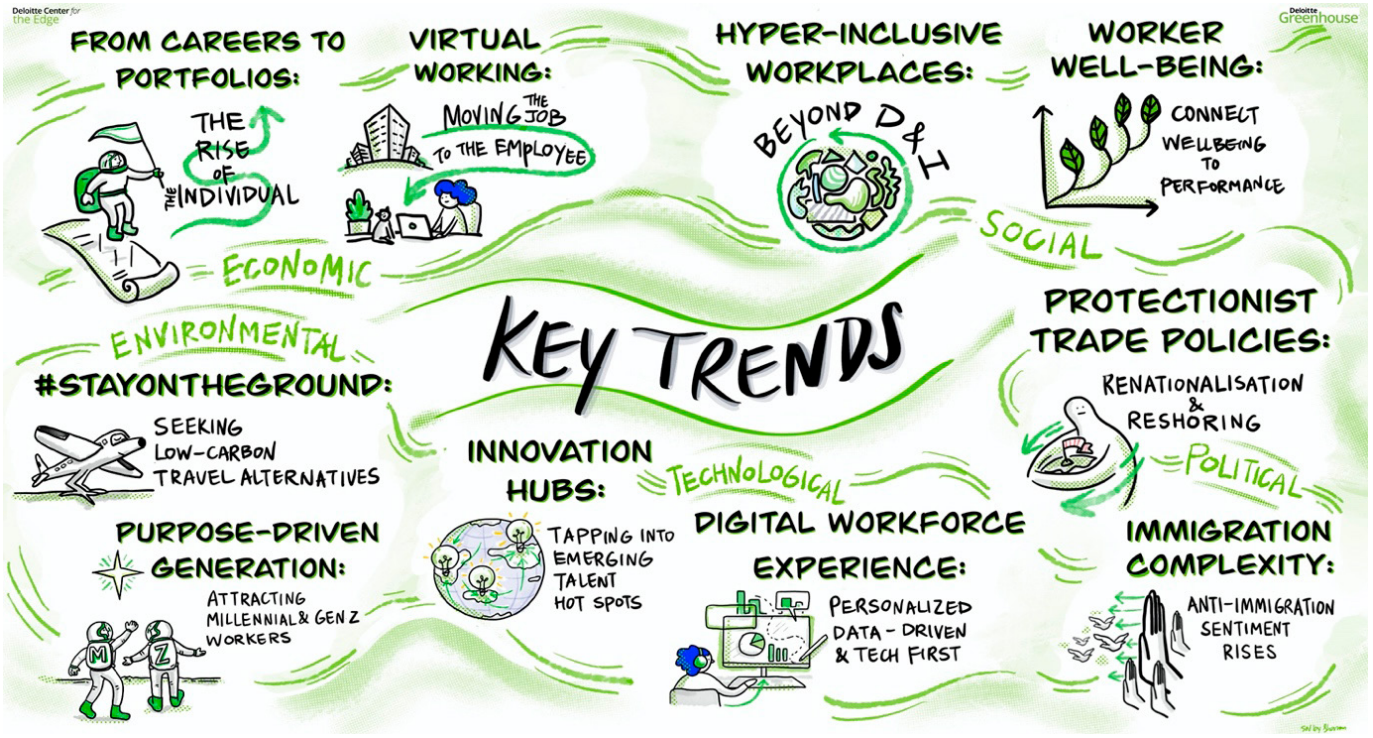
Key trends that are impacting employers, employees and Global Mobility

The world of work has been disrupted and provides an opportunity to re-imagine Global Mobility. The key trends below have been developed by Deloitte Center for the Edge analyzing broader business and Human Capital trends, as well as deep-dive interviews with Global Talent leaders.

This document will expand upon several of these key trends across economic, social, political, technological and environmental spectrums.

The deep-dive view on each trend is supported by extensive research and Deloitte insight.

Three key opportunities have been included as Global Mobility look to respond to these trends in the future.



Source: Deloitte Center for the Edge, Deloitte Human Capital Trends, 2020 & 2021 (including responses from c. 9000 Business and HR leaders); Deloitte Future of Work

How is Global Mobility responding to these key trends?

GM and HR have become key enablers in responding to these trends, with confidence in Global Mobility's ability to navigate future changes increasing among both business and HR executives.

The 2020 response

COVID-19 has highlighted to organizations the importance of having the right people in the right place at the right time – whether physically present or virtually capable. Over the past 12 months, Global Mobility has demonstrated exceptional value through helping maintain business continuity through a turbulent time of employee displacement, and closed borders.

The future opportunity

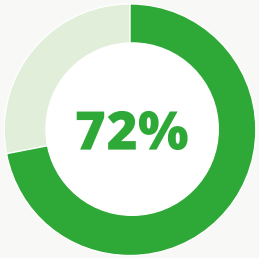
Global Mobility needs to quickly adapt to the disruption of work and wider trends. In addition to increased digitalization of the function, the rise in remote working and the importance of employee experience will be key drivers in the reinvention of Global Mobility. Global Mobility professionals need to enhance collaboration, redefine their roles and scope, upskill for the future, embed technology for data-driven insights and at the same time optimize program efficiency and cost.

By building on this opportunity, Global Mobility can build a future-proof legacy and enable their dynamic global workforce.

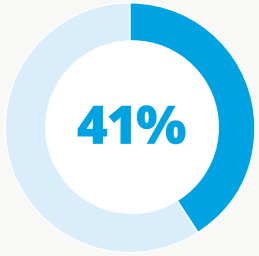
Trend 1: From Careers to Portfolios

Global Mobility is a **critical enabler of the global talent strategy**, moving people to jobs, as well as jobs to people.

HC trend[1]

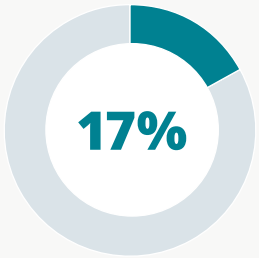


of executives think that **"the ability of their people to adapt, reskill and assume new roles"** is the most or second most important factor to navigate future disruptions



of executives said that **building workforce capability through upskilling, reskilling and mobility** is one of the **most important actions** they are taking to **transform work**

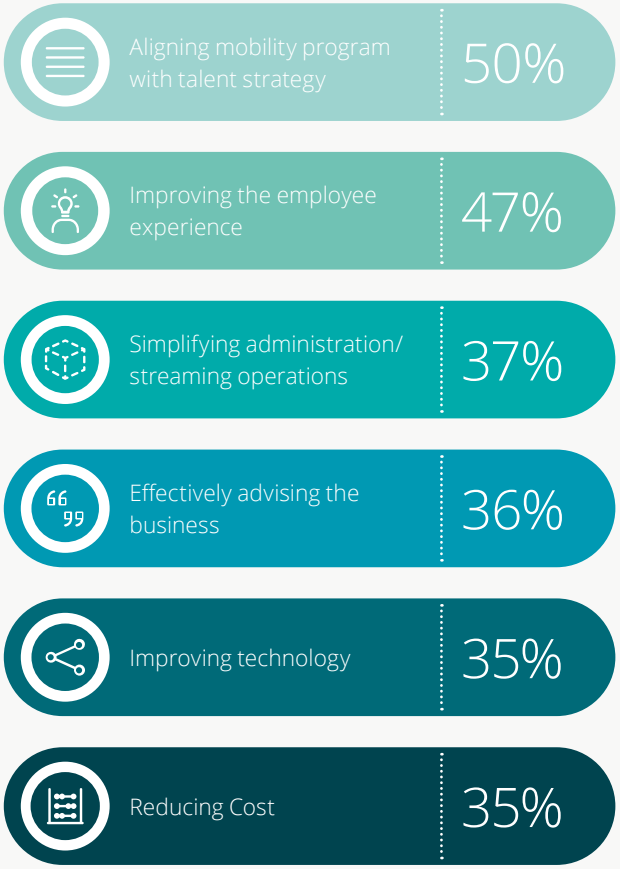
YET ONLY



say their workers are **very ready to adapt, reskill and assume their new roles**

GM Response

Top 6 Global Mobility initiatives to focus on in the next couple of years[2]:



Three key opportunities to align Talent, Global Mobility and the Future of Work

1. Ensure the GM policy framework and approach is designed to align to the internal mobility programme and support the overall talent objectives for different workforce segments and enterprise future of work strategy
2. Create deliberate strategic mobility business plans at the outset of each assignment linked to business and individual talent goals.
3. Develop a brand where GM is synonymous with talent growth, with movement supported through a wide range of assignment types

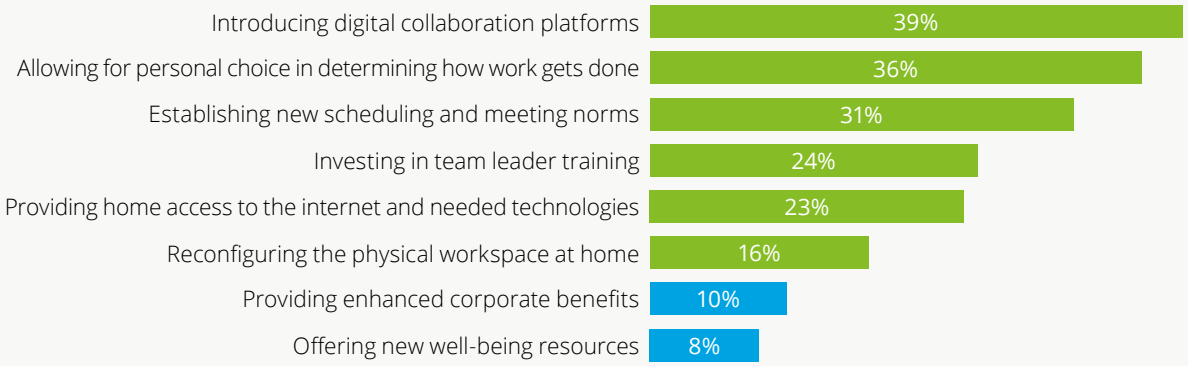
Source:
1. Deloitte Human Capital Trends 2021,
2. Airinc, Mobility Outlook Survey Report 2021

Trend 2: Virtual Working

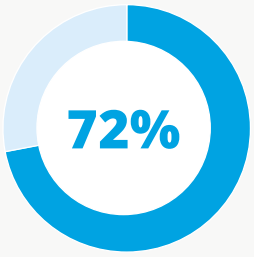
The pandemic has accelerated the Future of Work and the opportunity for Global Mobility teams to embrace the future, **expand their reach and focus**, and assume **a leading role**. In this expanded role, GM **becomes a vital enabler** of an organization's ability to adapt to remote working and the accelerated future of the global workforce.

HC trend

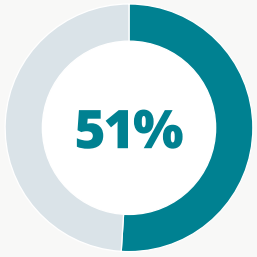
What are the most important factors in making remote/virtual work sustainable?
The top factors in making remote work sustainable were related to work design



workers who have been working remotely during the pandemic would prefer to continue doing so post-pandemic[3]



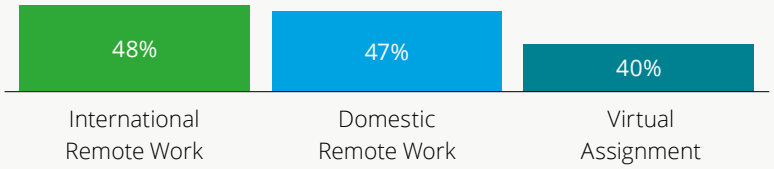
of workers believe they are equally or more productive working from home than at the office[3]



Of organizations cite increased engagement, flexibility, and well-being as key benefits of remote work[3]

GM Response[2]

Policies expected to increase:



The key opportunity to implement international remote working

Start with a feasibility assessment to understand:

1. **The benefits of virtual cross border working** at your organization, based on your working culture and desired behaviors
2. **The compliance parameters**, and additional considerations unique to your business (e.g. industry regulation, data security, safety, etc.)
3. **The way forward for cross border virtual working**, balancing the desired strategy and operational parameters

Source:

1. Deloitte Human Capital Trends 2021,
2. Airinc, Mobility Outlook Survey Report 2021,
3. Deloitte client Dbrief on 7 October 2020 with c.800 clients; Deloitte Remote Working Dbrief with c.400 clients on 5th Nov 2020

Trend 3: Hyper-inclusive workplaces

In a recent survey of 1,322 CEOs in 77 different countries, **77% reported that their organization has, or intends to develop, a diversity and inclusion strategy**. Yet despite positive intentions, the progress for many organizations has been slow.

Organization-level context[1]

Organizations with inclusive cultures are:

- **2x** as likely to meet or exceed **financial targets**
- **3x** as likely to be **high-performing**
- **6x** as likely to be **innovative** and **agile**
- **8x** as likely to achieve **better business outcomes**

GM Response[3]

	Response %
Our mobility program has been specifically designed to align with our company's DE&I initiatives	10%
We've made some modifications to our mobility program to align with our company's DE&I initiatives	32%
We haven't done anything specific to our mobility program to align with our company's DE&I initiatives	56%
Our company is not focused on DE&I	2%
Total Responses	**100%**

Global Mobility program-level context[2]

Organisations with inclusive cultures are:

Millennials
Millennials will comprise **75%** of the workforce by 2025... and **59%** are willing to work abroad

Women
Although women represent more than **40%** of the global workforce... only 1 in 5 international assignees are women

Family
Family concerns are **#1** reason for assignment refusal and assignment failure... and mobility practices often lag in applying changing definitions of family

Ethnicity
6% of leaders actively encourage mobility to minorities...despite **88%** reporting concern about finding suitable candidates[1]

LGBT
53% of LGBT employees are not fully out at work ...while **39%** were reported as turning down assignments for fear of backlash...[11] and **61%** of employers are unaware of conditions in countries of operation[6]

Three key opportunities to integrate Diversity, Equity and Inclusion (DE&I) into Global Mobility

1. Utilize enterprise DEI strategy tools to assess inclusive leadership at all levels of the mobility program and help with bias mitigation.
2. Better understand how mobility participation compares to other programs across the organization to determine common and unique barriers to program participation.
3. Make opportunities transparent in the organization and proactively encourage mobility to diverse candidates. Publicize success stories.

Source:

1. J. Bourke, Australian Institute of Company Directors, 2016,

2. World Bank, World Development Report on Gender Equality and Development, Deloitte, The Millennial Survey, 2014, BGRS, Boston Consulting Group, Decoding Global Talent, Out Now Consulting, Out Now Global LBGT 2020 Study, Mercer, E&Y, Global Mobility Effectiveness Survey, EERC, "Inclusion & Diversity: How Global Mobility Can Help Move the Needle," 2018,

3. Airinc, DE&I Pulse Survey 2021

Trend 4: Worker Wellbeing

Organizations looking to unleash the workforce and build wellbeing into work should consider actions, policies and mandates at three levels; **individual, team and organizational**. Wellbeing should be embedded into the design of work and mobility itself, not just as an 'add-on'.

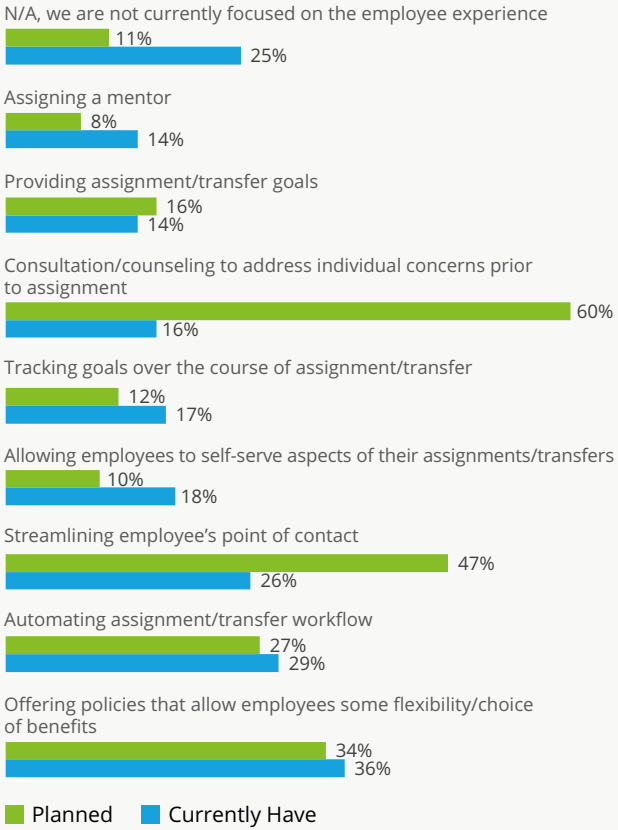
HC trend[1]

Workers prioritize transforming work for wellbeing more highly than executives

Rank	Senior Executives	Individual Workers
1	Improving the customer experience	Improving Quality
2	Increasing innovation	Increasing Innovation
3	Reducing cost	**Improving worker wellbeing**
4	Improving quality	Improving the customer experience
5	Doing new work	Doing new work
6	Increasing capacity	Reducing cost
7	Growing market share	Increasing capacity
8	**Improving worker wellbeing**	Growing market share
9	Increasing social impact	Increasing social impact

GM Response[2]

Initiatives to improve the employee experience during an international assignment or transfer:



Three key opportunities to integrate wellbeing into Global Mobility

1. Map assignee journeys to understand any pain points, and take steps to minimize the stress to the assignee
2. Survey the mobile population to understand the employee experience today and any opportunities for enhancement
3. Partner with DE&I to ensure the needs of the mobile workforce are met, and people's true potential can be unleashed through international experience

Source:

1. Deloitte Human Capital Trends 2021,
2. Airinc, Mobility Outlook Survey Report 2021

Trend 5: Protectionist Trade Policies & Immigration Complexity

There is an increasingly complex immigration landscape, exacerbated by measures taken in response to COVID-19 and widespread uncertainty. **Globally there is a focus on local labor and anticipated immigration backlogs**.

Trend

- **65%** of US companies BAL surveyed reported **changing some of their policies** to address the continued delays for visa appointments.
- Brexit. No "favorable" treatment for EU nationals in the UK or UK nationals in the EU
- Continuous changes to rules and processes as countries adapt to pandemic challenges
- Additional responsibilities (e.g. medical certificates, quarantine expenses etc.) to be borne by sponsoring companies on business travelers and new foreign hires
- Due to economic downturns, expected further tightening of rules (e.g. review and tighten labor market testing requirements)
- Marked increase in program costs
- Certain areas demonstrating efforts to attract people/foreign investment into the region e.g. UAE, Saudi Arabia
- Digitization of immigration systems and links with tax and social security authorities
- New UK immigration system
- Remote working and impact on immigration compliance

Three key considerations for Global Mobility in response to immigration complexity

1. Revisit recruitment practices and documentation procedures
2. Release and reiterate communications to employees to address flexibility and policy changes that have been adapted due to COVID-19
3. Understand the remote working impact (e.g. employees not to begin working remotely until necessary immigration actions have taken place)

* Note: Immigration services are provided by the immigration practices of Deloitte Touche Tohmatsu Limited ("DTTL") member firms or other approved third parties outside the United States or by Berry Appleman & Leiden LLP ("BAL LLP")** in the United States or de Lint LLP in Canada an immigration law firm allied with Deloitte LLP in Canada.

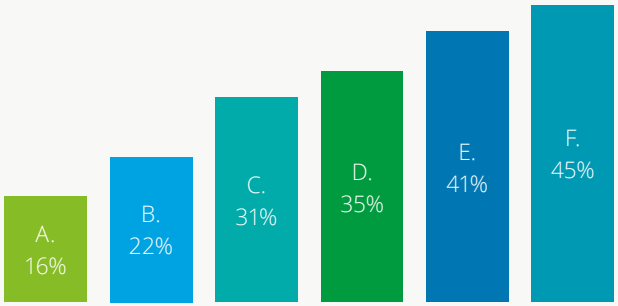
** BAL LLP provides US immigration services under an alliance with Deloitte LLP. Deloitte Tax LLP does not provide immigration or legal services and is not a party to the alliance with BAL LLP.

Trend 6: Digital Workforce Experience

Global mobility is **humanizing and digitizing**. Programs that can effectively use **data** and pair **people** with **technology** to re-architect work in more human ways will elevate teams' ability to **learn**, **create** and **perform** in new ways to achieve better outcomes. COVID-19 has prompted organizations to rethink how technologies can be used to team more effectively.

HC trend[1]

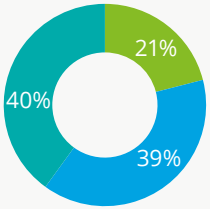
What are the most important actions you are taking or will take to transform work?



- A. Building portfolios of humans and machines working together
- B. Restructuring the organization to support new work outcomes
- C. Establishing new work practices, policies and incentives
- D. Implementing new technologies
- E. Building workforce capability through upskilling, reskilling and mobility
- F. Building an organizational culture that celebrates growth, adaptability and resilience

GM Response[2]

Does Global Mobility demonstrate its value to the organization through analytics or metrics (e.g., reporting on measurable outcomes through dashboards)?



- Yes, we regularly report measurable outcomes to demonstrate
- Sometimes we report measurable outcomes to demonstrate GM's value to the organization
- No, we don't report on measurable outcomes to demonstrate

How does Global Mobility function know it is successful?

Positive feedback received from the business	**89%**
Positive feedback from HR	70%
Compliance risks are minimized or non-existent	68%
Positive feedback received through assignee surveys	65%
Assignment/transfer processes are standardized and efficient	64%

Three key opportunities to enable a Digital Workforce experience

1. The use of AI for predictive analysis/insight and to elevate worker and team capabilities
2. Automation of repetitive, manual tasks in support of the future of work agenda
3. Data-driven insights, including ROI of mobility

Source:

1. Deloitte Human Capital Trends 2021,
2. Airinc, Mobility Outlook Survey Report 2021

Trend 7: #StayOnTheGround

Pressure has been mounting on businesses to develop meaningful responses to the climate crisis (including in relation to business travel), and COVID-19 has provided an opportunity for organizations to pause and to **'build back better'**.

Trend

What are the most important actions you are taking or will take to transform work?

134 million

There were more than 134 million visits to or from the UK during **2019**[3]

34.9 million

And there were only around 34.9 million visits to or from the UK during **2020**. This is around **74% fewer** than 2019 due to COVID-19[3]

China's emitted 27% of the world's greenhouses gases in 2019[5]

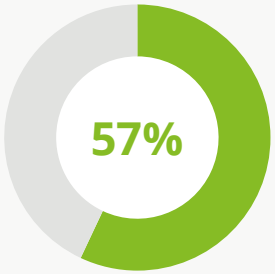
China's carbon dioxide emissions have reduced by 25% because of measures taken to contain COVID-19[2]

In 2017, the US announced its withdrawal from the Paris Climate Agreement

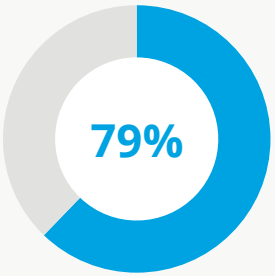
In 2021, the US announces it will aim to cut its greenhouse gas emissions in half by 2030[6]

GM Response

Does Global Mobility demonstrate its value to the organization through analytics or metrics (e.g., reporting on measurable outcomes through dashboards)?



Of organizations reported that they were already taking steps to minimize the impact of business travel on the environment at the start of 2021



Of organizations were investing in videoconferencing technology as an alternative to short-term travel even before the pandemic

But 79% of respondents admitted that they didn't know how travel emissions were incorporated within sustainability reporting1

Three key opportunities to integrate sustainability into Global Mobility

1. Obtain and analyze data to understand the current GM footprint, and create targets for the future, defining the measures of success
2. Reduce the emissions of the supply of travel through activities such as developing a sustainable supply chain, encouraging responsible behaviors through the travel policy (e.g. ability to claim air miles) and carbon offsetting
3. Consider aligning incentive pay with climate goals to ensure employees are rewarded for environmental conscious behaviors

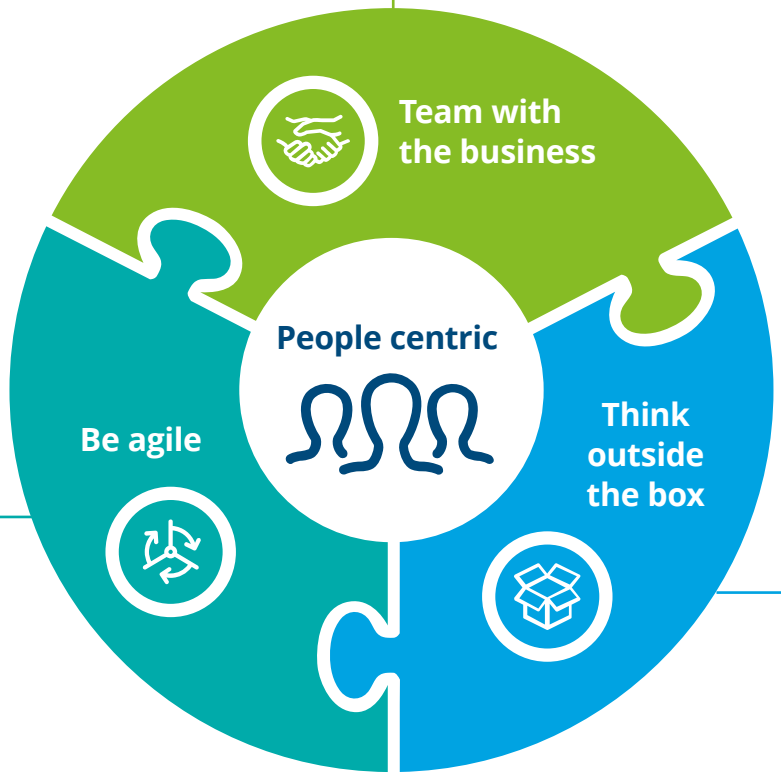
Source:

1. Deloitte Business Travel Survey, 2020.
2. Centre for Research on Energy and Clean Air (CREA).
3. Office of National Statistics, 2020. Source
4. Quick 2019.
5. BBC Report: China emissions exceed all developed nations combined,
6. The White House Statements and Releases, 22 April 2021

Looking forward

Global Mobility should respond to these trends with agility and innovation in order to strike the desired balance between business and people needs.

Team with the business
Now is the time to be an advisor to the business and collaborate widely to ensure your HR/Mobility strategy supports business needs.



Be agile
The pace of change is rapid, and agility is essential. Focus on short term 'sprints' instead of long-term changes. Speed and Flexibility are critical.

Think outside the box
Now is the time to be innovative, challenge the status quo and push the boundaries on traditional way of doing things. Don't be afraid to redefine, upskill and transform.

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Deloitte's Global Workforce Transformation Practice

Deloitte's Global Workforce team partners with organisations to establish future-proof global workforce strategies, tailored to client specific business and talent objectives. We embrace design thinking and are data driven to help clients reimagine and transform their approach to talent mobility, focusing on areas including policy and process design, strategic and operational transformation, global talent strategies, digital innovation, planning and deployment, and workforce analytics.

Find out more here www.deloitte.co.uk/globalworkforce

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