



## Strategic Moves 2012

### The Global Mobility Island

GO ▶



A global survey on today's workforce mobility challenges

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# Foreword

Welcome to our annual Strategic Moves Survey.

The 2012 survey report provides insights into the current and future state requirements of Global Mobility. As the report clearly states, the direction for Global Mobility is clear – businesses expect strategic value from the investments they are making in global talent and for this reason Global Mobility will have to enhance its capabilities. We hope that you find the report insightful and that it gives you meaningful guidance as to what the future for Global Mobility could be.



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### Global mobility: alive and well, but marooned

An increasingly globalised world needs a global, mobile workforce. Few business leaders would disagree in principle. Most are happy to go beyond principle: They readily identify emerging markets and the need for global mobility as priorities for their own organisations.

But knowledge is not action. In the latest annual survey of almost 200 HR, talent and global mobility professionals from companies around the world, the same responses that reveal a keen awareness of global mobility issues also show little movement to address those needs. Where organisations are taking steps, they appear to be aligning their global mobility strategies with functional needs, not with key business priorities. And they are not using global mobility to help develop the next leadership generation.

Proportion of those who identified global mobility as an important tool to address top-three strategic business issues



100%

for emerging geographical markets



99%

for increasing globalisation



98%

for increasing competition

Professionals who describe their own organisations' global mobility practices as "World-class"



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34%

plan to review  
their global  
mobility  
strategies  
in the next  
12 months

**It is as if business is sailing on towards a global future, having left global mobility strategy behind on an island of its own.**

Organisations that fit this description risk finding themselves awash with new opportunities they don't have the workforces to exploit. This is because business isn't the only thing going global. Talent is as well. We are now operating in an *open talent economy*. Today, talent moves easily to and through the boundaries that used to demark organisations and even nations. People are the CEOs of their own careers, and long-term employment – even formal employment of any duration – has less hold on them than ever before.

The continuing disconnect between thinking and action on global mobility shows organisations are still at sea when it comes to embracing the open talent economy. They have a sense of what must happen but not a plan for making it happen.

**Can global mobility start to close the gap?**

Organisations recognise global mobility as a tool to support the most top strategic business issues, namely emerging geographical markets, increasing globalisation and increasing competition. However, only a small percentage are using mobility fully to address those issues. Global mobility is still behind the curve when it comes to driving business results. Seventy percent of business and HR stakeholders say global mobility in their organisation is underperforming or needs improvement, some of it significantly.

This highlights opportunities for the business and global mobility teams to deepen ties with each other which may start to be happening now. Nearly 40 percent of organisations say they are currently reviewing or are about to review their overall global mobility strategies, including alignment with business issues and goals.

In practical terms, alignment requires business leads or HR business partners to involve global mobility at strategy table discussions where business issues are addressed, so global mobility can articulate the value assignments may bring. It also requires global mobility to engage regularly with the business, directly or via HR business partners, to provide statistics and challenges aligned to top business issues. Mobility leaders must also keep abreast of changing business drivers that may affect the way they structure their programmes and deliver services.

One particular finding from the survey sheds insight into why strategists embrace the idea of global mobility even as the organisations they lead appear to lag in implementing it. Respondents in different roles were asked whether they felt global mobility was a purely administrative function, a strategic value-adder, or both. Respondents in business HR roles were most likely to see it as purely strategic (42 percent). But in a mirror-image outcome, those tasked with high-level talent and reward responsibilities – the people with the power to elevate global mobility to the realm of grand strategy – were most likely to see it as purely administrative (42 percent).



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**Taking a closer look at this disconnect,** of those organisations who rate talent as critically important, the majority do not rate themselves as world class in the use of global mobility practices for talent purposes. Echoing the results from the 2011 survey, this suggests there is still a large gap between where organisations are now and where they want to be in terms of global mobility.

The majority of organisations surveyed are well aware of the current limitations of their global mobility programmes from a practical as well as a strategic standpoint, but they are not translating that awareness into initiative: Only 2 percent see themselves as world-class and only 12 percent report that they perform clear assessment of their mobility practices and link those assessments to improvement efforts. The vast majority of organisations surveyed (88 percent) are undertaking only a limited assessment of their mobility practices.

This is a surprising result given the amount spent on international assignments each year. Global mobility and HR leaders should ask themselves: Would other HR areas, such as reward, learning and development, or talent management, receive similar neglect if they were found wanting? By failing to assess and measure global mobility practices in a planned and regular manner, organisations are missing the chance to fully understand their difficulties and learn how to overcome them. You cannot strengthen an ability if you won't even measure the ways it's deficient.

Overall, this indicates a lack of clarity amongst organisations in determining which improvement initiatives they should use to ensure their programmes are meeting their strategic objectives. Where companies are undertaking improvement activities, the main focus appears to be on policy and process review and redesign. When asked however about what initiatives should be undertaken in the next 12 months there was no consistent response or understanding of which improvement areas should be prioritised. This is another symptom of the disconnect between a stated desire for strong mobility programmes and the failure to make them a reality.

#### **What is the way forward in the short term?**

In order to align global mobility to business and talent strategies, companies need to define what they want to achieve, make a regular assessment of whether they are achieving it, analyse the gap, and make plans to close it. Based on the survey results, it is clear the majority of organisations that responded to the survey are not doing this. In summary, organisations need to:

- 1) **Agree upon the strategic purpose of global mobility** within their organisation and define what great looks like to all key stakeholders. Once this has been established, the appropriate strategy can be agreed upon and improvement roadmaps developed. This may require better integration of various technology systems, processes, policies, vendor capabilities, and overall use of data analytics amongst other initiatives.



88%

said that their organisations do not have either clear measures or measurement based improvement plans, or both



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70%

of business HR  
stakeholders  
say global  
mobility in their  
organisation is  
underperforming  
or needs  
significant  
improvement

2) **Understand the value proposition of global deployments:**

Take time to look at who they are sending on assignments and why and how this fits in with the individual business units growth and talent plans. This will involve the use of appropriate candidate selection, assignment justification, and assignment approval processes. There may be alternatives to mobility in many cases such as through talent acquisition and talent retention strategies. Likewise, assignment extension, early repatriation, and assignment failure should be investigated to see to it that assignment costs are not being wasted.

3) **Enhance the use of mobility data analytics.**

Not only report on cost, but look at it alongside other metrics. If total assignment costs go up slightly but all strategic KPIs are being met, then the additional investment is likely to be worthwhile to the organisation. Likewise cost reductions should not be made if they will lead to missed KPIs in other areas.

**What is the way forward in the future?**

Whilst focusing on these initiatives in the short term will start to close this gap it also highlights the longer term challenge that global mobility is still missing one key element in its scope of services: an overlaying ability to develop strategic initiatives (or 'propositions') in alignment with specific business priorities. These propositions respond to critical long-term strategic organisational capabilities such as M&A activity, change acceleration, culture change, talent gaps, and growth. Given the business challenges leading global organisations face this new area of strategic focus should be in the area of global workforce management – the strategic management of an organisation's global supply and demand of skills and talent. This will require the creation of new capabilities within global mobility to drive global workforce planning improvements across the entire organisation.



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If global mobility is ever to truly meet the needs of the business, it needs to move away from traditional, functionally aligned roles to business-aligned roles that can support the projects and programmes that the business is focused on. With alignment on solutions for business challenges like global workforce management, the mobility teams and centres of expertise can finally close the gap and align with the business by solving their most critical business issues. This does not mean the end of traditional mobility teams and centres of expertise, but it does require organisations to rethink the way they provide support for both functional and business focused needs and supplement these functions and roles with new global workforce management capabilities. This will also require investment both in wider functional capabilities such as global standard reporting and HR technologies, together with the ambition to invest ahead of the talent demand curve to create the required supply of talent.

Positioned appropriately, by adding global workforce management capabilities to their suite of services, global mobility can be the key player in solving an organisation's long-term skill supply-and-demand talent gaps. There is tangible value to be realised, but it will likely take a departure from the current model and a strong vision of the future in order for organisations to truly align mobility and talent with their wider business and talent strategies.

Talent & Reward  
respondents consider  
Global mobility  
Administrative

Business HR  
respondents  
consider Global  
Mobility Strategic



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# The business requirements of global mobility





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### The challenge for global mobility

The world has seen waves of globalisation before. Nineteenth-century European struggles over Africa, central Asia, and the Americas were slow-motion precursors to the moves multinational organisations are making today. The new targets for growth and profit include the BRIC countries of Brazil, Russia, India, and China, but extend to other, so-called “emerging” markets.

These markets offer high growth, or at a minimum the potential for high growth, to companies operating in the saturated and depressed markets of the “developed” world. Multinational organisations are bound to seek out these new opportunities if they wish to improve their return on equity and enhance the attractiveness of their shares. Some companies have seen their profits eroded as consumer demand in traditional markets has ebbed over the last few years. Even companies that have been successful during the recession must now contend with market saturation. In either case, the emerging world beckons as a place to do and grow business.

### An emerging opportunity

The macro context for companies that wish to do business in the global marketplace is illustrated in Figure 1. Note the contrasts between developed countries and emerging countries in actual and forecasted growth. With growth rates of around 2 percent in the former and 7 percent in the latter, there is a clear gap in potential. The opportunities for growth in emerging countries far outstrip those in mature ones. However, organisations cannot reap these growth opportunities unless they master the challenge of putting the necessary skills, leadership, and development in place, and retaining them.

Along with the differences in growth rates, the overall balance of world GDP is changing [Figure 2]. By 2018 emerging markets will have more than half the globe’s GDP. Emerging economies already account for more than half the world’s steel and oil consumption, car sales, foreign exchange reserves, and other indices – even mobile phone subscriptions.

Taken together, these indicators paint the picture of a large-scale shift in the global economy’s centre of mass.



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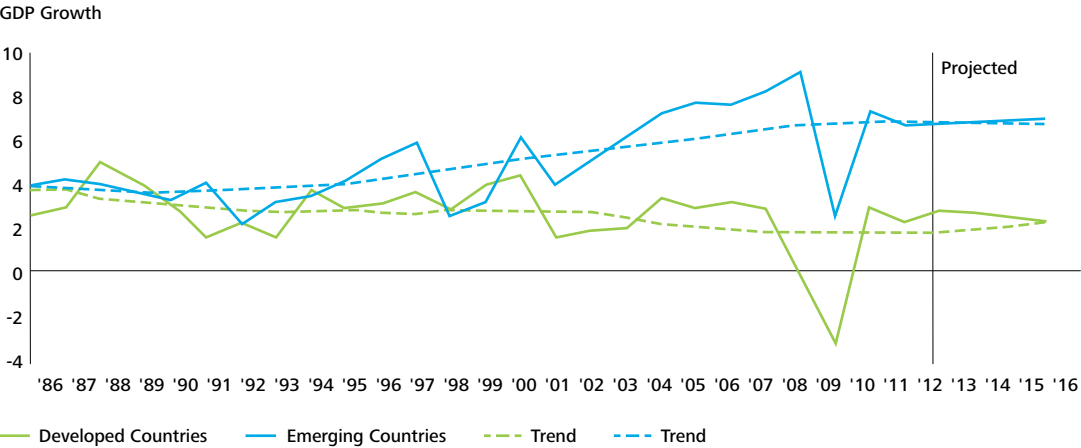
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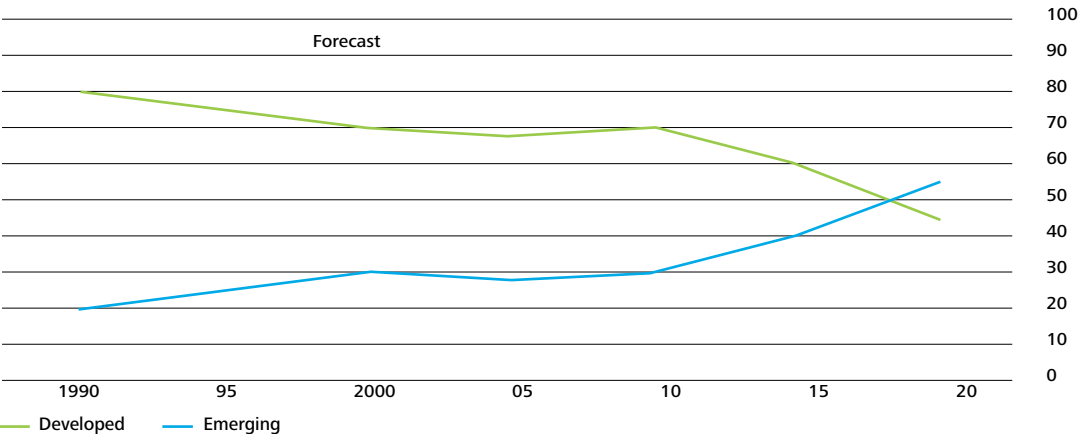
Figure 1. Emerging Country and Developed Country GDP Growth (with IMF Forecasts)



Source: Deloitte: Transforming Mindsets: Effective Business Models for Emerging Markets 2012

Figure 2. Global balance

Economies' share of world GDP, %. At market exchange rates



Source: AT Kearney; Bloomberg; BP; dotMobi; Fortune; IMF; UBS; UN; World Bank; World Steel Association; WTO

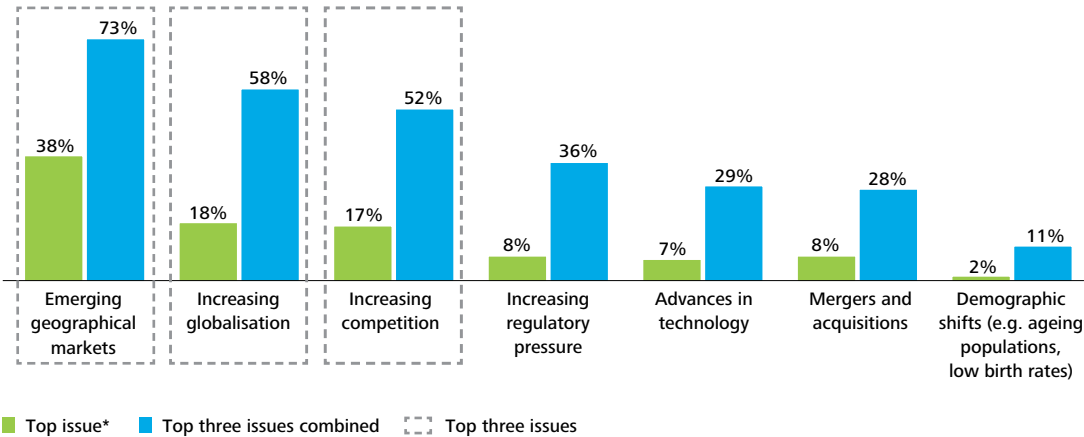
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No lack of awareness

Because of the growth gap and the change in the balance of trade, emerging markets have become a top strategic issue for companies everywhere. The survey results show business leaders appreciate this fact [Figure 3]. Asked to name their organisations' most pressing strategic business issues, they were most likely to name "emerging geographical markets" as the topmost one, and most likely to rank it among the top three.

The second and third-place concerns – still ahead of concerns such as technology, and regulatory pressure – were "increasing globalisation" and "increasing competition." Companies are seeking growth right across this spectrum, from South America through the former Soviet republics, the Middle East, Africa and the Asia-Pacific region.

Figure 3. Top strategic business issues as ranked by respondents



\*2% respondents selected "others" as their top issue.

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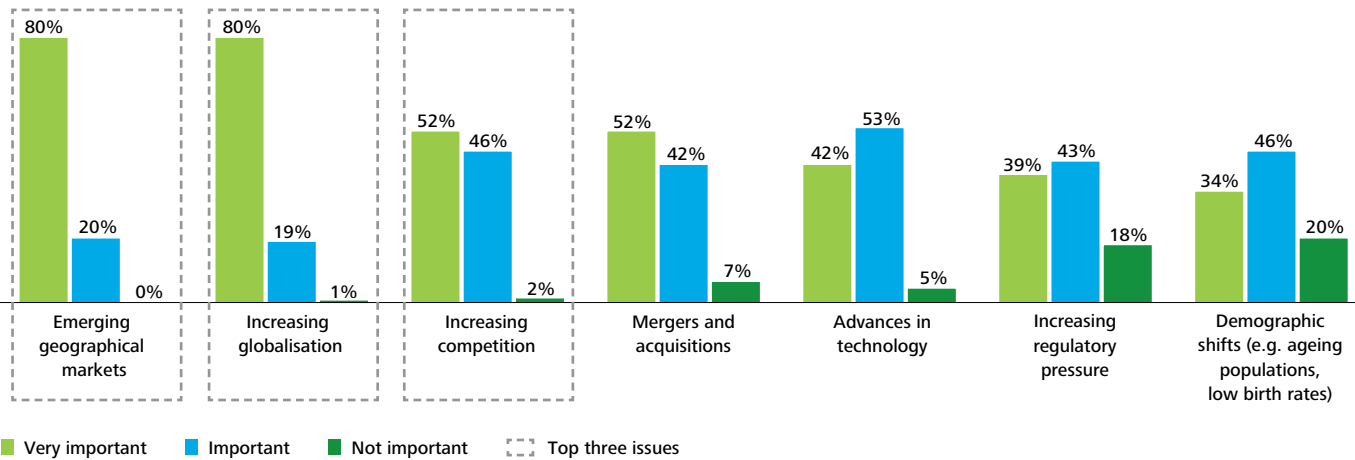
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Figure 4. How important is it for global mobility to support the strategic business issue



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Clearly, the surveyed organisations know emerging markets are a key strategic challenge for them. In fact, 98-100 percent identified global mobility as an important tool to support the business in addressing top three strategy issues [Figure 4] – i.e. emerging geographical markets (100%), increasing globalisation (99%), and increasing competition (98%). Organisations recognise global mobility as a fundamental support mechanism. What remains to assess is what they are doing about it.

#### Actions versus intentions

Despite this seemingly strong mandate on the global strategy front, business lines do not appear to value global mobility and do not use it effectively to solve organisational challenges. The survey results show global mobility is not currently being used to address all areas where respondents acknowledge it can play an important role. For example, although 98 percent of respondents feel mobility should support efforts to address increasing competition, 16 percent of those respondents feel it isn't being used for this purpose [Figure 5]. Only 12 percent say it's being used fully, leaving a vast middle ground – almost three-quarters – who see global mobility being used only partially to address competition for business.

This indicates a clear gap and an area for strategic improvement, and indeed, survey respondents see it as well: 98 percent of all respondents say that their organisations' global mobility practices are less than world-class completely, and need improvement.

#### Spotlight: strategic business issues experienced differently?

**Industry variation:** Increasing competition, a top-three strategic business issue across all survey respondents, does not figure within the Financial Services industry. Instead, this sector places mergers and acquisitions in the top-three list.

**Regional variation:** North American companies do not rank emerging geographical markets or increasing competition as high among their challenges as do their counterparts in Europe and the rest of the world. On the other hand, Merger & Acquisitions is a top-three issue for North American companies – and increasing globalisation is twice as important in North America as it is in the other regions.

Even when the question focuses on emerging markets, which respondents to the survey clearly identified as the top strategic issue, the expected follow-on moves do not appear: Fully two-thirds of businesses report mobility is only partially supporting them in this area.

On these few statistics alone, the business case for a well-structured global mobility strategy stands in sharp relief. The strategic issues that companies identify for themselves are ones that could respond positively to an effective mobility strategy, yet at present those same companies aren't bringing mobility to bear against those challenges. This appears to be a self-imposed limitation on the realisation of growth potential.



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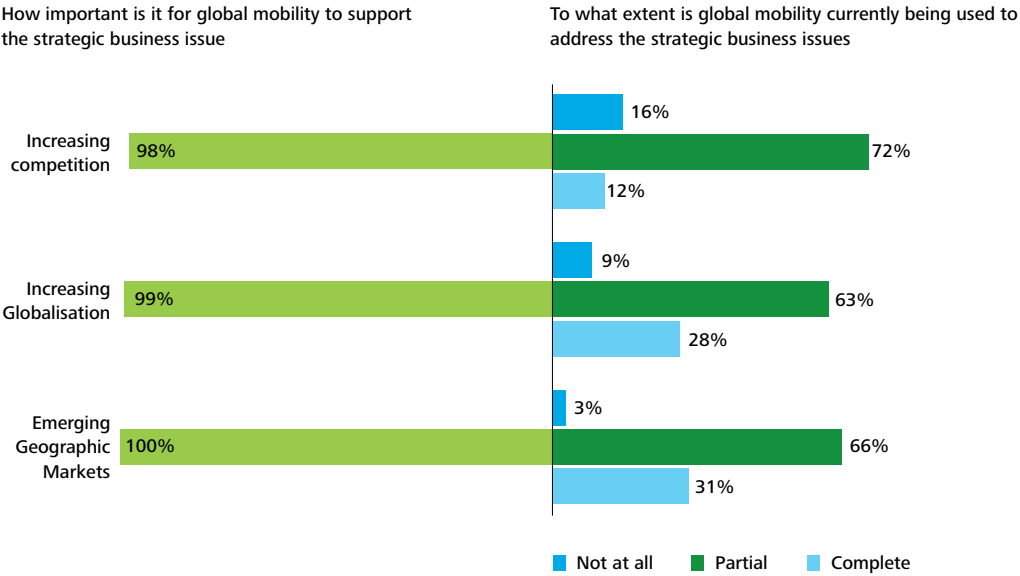


**Spotlight: global mobility leveraged differently to address business issues?**

**Industry variation:** Energy & resources and financial services organisations use global mobility to address their strategic business needs more than any other sectors. Consumer business and transportation use global mobility the least.

**Regional variations:** North America is the region that makes the least use of global mobility to completely address its top business issues.

Figure 5. The requirement fulfillment gap



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“It is essential to our Firm’s growth and success in supporting client needs, particularly in priority markets that we effectively plan, execute and maximise strategic mobility assignments as an opportunity to advance our mobility strategy and deploy and develop talent.”

**Christina Antoniou**

Leader Global Mobility and Sourcing, Deloitte China



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### The importance – and challenge – of the mobile workforce

No matter how robust their overall growth strategies, many companies find themselves struggling to compete in new markets when it comes down to specifics like product, resources, scale, or sustainability. The practicalities of growing a business at arm's length are complex. Fundamental model challenges are only the beginning. Additional obstacles include resourcing, training, brand, expertise, experience, control, compliance, and providers. These factors combine to make a compelling case for workforce intervention – whether through recruitment, assignment, or identification of existing resources.

Global mobility and workforce management can help address these challenges through a well-thought-out combination of assignments, relocations, local hires, and business trips. But moving from theory to practice requires overcoming two broad problems. First, how can organisations effectively estimate, identify, manage, move, and segment the various parts of their mobile workforces? Second, how should the management of this mobile population interact with the identification and development of talent to address business objectives and remain competitive?

We have seen that emerging and high-growth markets are increasingly being seen as critical to business survival and growth. These markets bring with them some specific operating challenges, particularly in terms of skills and employability. Because of a lag in tertiary education and a lack of business experience and expertise, managers in these markets often contend with a scarcity of skills such as leadership, teamwork, problem solving, management, and, in many cases, English proficiency. The result is an enhanced need for imported talent – which presents problems of its own in situations that require an understanding or experience of a specific culture. As developing economies invest billions of dollars in healthcare, infrastructure, and other large projects, they need to import talent, skills, advisors, and experienced personnel.

In addition to the skills shortage on the ground right now, there is clearly a wider issue concerning development of local talent for future needs. Demographic changes mean some countries stand to pair domestic workforce growth with economic expansion, but other markets have lower forecasted workforce growth (such as China) or lower forecasted growth in jobs (such as Greece).





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Clearly, global businesses need mobile workforces to address these asymmetrical objectives. Despite this clear rationale for global mobility, there are differing trends in terms of the numbers of assignees or other mobile individuals globally. More than 60 percent of the organisations surveyed expect the number of assignees (or mobile employees) to increase or significantly increase within the next three to five years. This aligns with the results of the same survey last year, which showed an even greater expectation of future mobility (74 percent). This finding supports the case for mobility as an ongoing trend amid the global grab for growth.

**The way forward: What is mobility's place in organisational thinking?**

One particular finding sheds insight into why strategists embrace the idea of global mobility even as the organisations they work for appear to lag in implementing it.

Respondents in different roles were asked whether they felt global mobility was a purely administrative function, a strategic value-adder, or both. Respondents in business HR roles were most likely to see it as purely strategic (42 percent). But in a mirror-image outcome [Figure 6], those tasked with high-level talent and reward responsibilities – the people with the power to draw global mobility to the strategic discussions – were most likely to see it as purely administrative (42 percent).

Talent & Reward respondents consider Global mobility Administrative

Business HR respondents consider Global Mobility Strategic

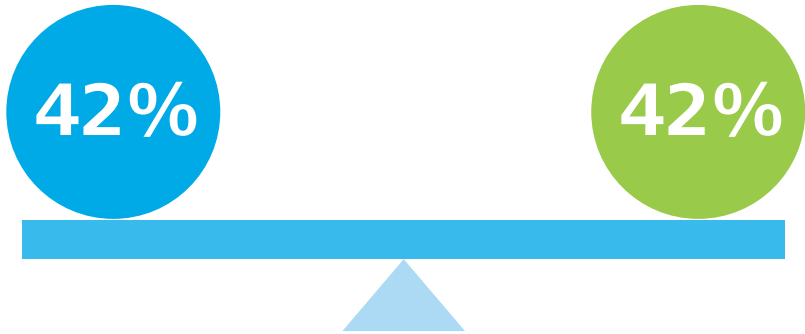
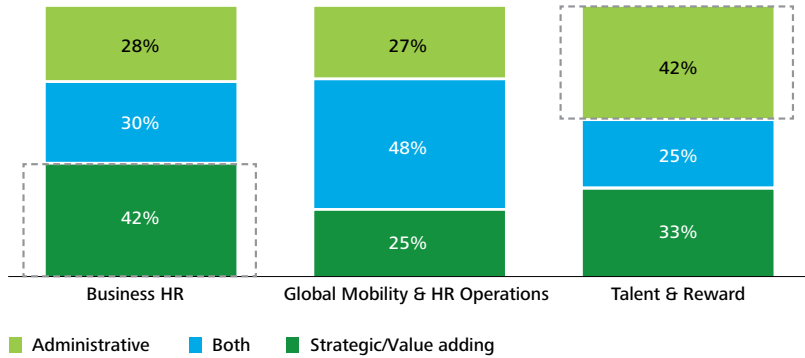


Figure 6. Is the contribution of global mobility considered strategic/value adding or administrative?



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### Case in point: the global evolution

The benefits of a thoughtful approach to globalisation, applied by a large UK retail organisation whose key business lines were trying to tackle its need to get global quickly, drove an outcome which required redesigning the fundamental building blocks of its existing global mobility operations. HR leadership decided upon an evolutionary approach to globalisation. Attuned to the company's tolerance for change and to the real business drivers behind the globalisation need, the HR team understood that trying to change too quickly would not create a sustainable model. They recognised from the onset that the driver for globalisation was the need to increase the organisation's presence in critical emerging markets and, as a result, the primary goal of globalisation needed to focus on providing a global view of the organisation's global talent base through a future workforce planning initiative.

As a result of the global workforce planning initiative, HR prioritised its transformation of the global mobility programme to focus on three core elements: (1) implementing a single, global compensation management solution where employee compensation could be delivered reported effectively across borders; (2) standardising the mobility-related processes and service delivery model that affected the organisation's ability to identify and deploy global talent and, (3) harmonising and communicating the value proposition of global mobility through segmented policies and re design of their internal intranet and communications platform. Through these three key initiatives, HR was able to support the need for globalisation and greater global mobility while establishing the foundation for future globalisation efforts.



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**The survey shows** that organisations that spend time and resources to address large-scale business and talent requirements persist in leaving global mobility on an island apart from strategic concerns, when instead they could profit from integrating it with other efforts. When organisations treat global mobility solely as an operational matter that satisfies specific technical requirements, they tend to over-engineer or over-specialise it, in keeping with that technical mindset. This relegates global mobility to a functional level and leads to silo behaviour. As a result, it remains on the periphery where it cannot effectively support the broader business and talent agendas.

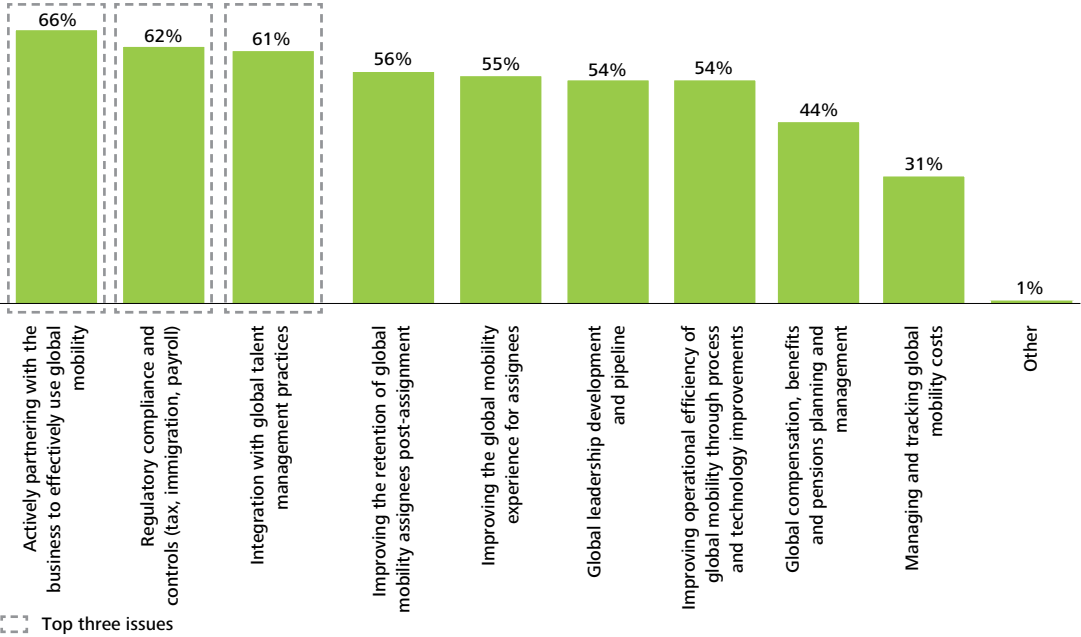
Asked to name the top three challenges specific to mobility (not, as discussed above, the top three overall business challenges), respondents showed manifest concern for this problem: Two of the top three answers were “actively partnering with the business to effectively use global mobility” (66 percent) and “integration with global talent management practices” (61 percent) – in other words, setting mobility apart from other talent practices and from the business strategy itself. The remaining top-three issue was regulatory compliance and controls (62 percent).

The earlier finding in Figure 6 reinforces the sense of this challenge. Recall that only 25 percent of global mobility professionals felt their own teams were seen as strategically integrated and value-adding. These results highlight the need for the global mobility team itself to shift its mindset and align more strategically to the organisation’s business and talent functions. The question that remains is whether the mobility team bears the responsibility of forcing its way into higher-level conversations, or if the business leadership bears the responsibility of embracing mobility more warmly, or both.



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Figure 7. Top global mobility challenges



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For the mobility team, this change in the mindset will mean ultimately re-defining the level of support it provides. Mobility leaders will have to adjust and define roles, responsibilities and touch-points between stakeholders in order to facilitate smooth interaction between all groups. In some instances they will have to re-skill members of the global mobility team so that instead of being purely operational, they can provide advisory support and direction to the business and talent functions and take an active role in strategic table discussions.

In considering this need for better alignment between business and mobility, it helps to consider three distinct categories of alignment: business, talent, and compliance.

#### **Business alignment**

Whatever their strategic value and ultimate return, international assignments carry significant initial costs. Survey respondents clearly cited this as the main barrier to global mobility, so mobility functions should consider managing the organisation's human capital assets like an investment portfolio.

As Figure 4 indicated, all respondents recognise global mobility as a tool to support the most top strategic business issues, namely emerging geographical markets, increasing globalisation and increasing competition. However, only a small percentage reported they were using mobility fully to address those issues if at all. Global mobility is still behind the curve when it comes to driving business results. Seventy percent of business and HR stakeholders say global mobility in their organisation is underperforming or needs improvement, some of it significant.

This highlights the need for the business and global mobility teams to deepen ties with each other. Survey responses show this may be happening now. Nearly 40 percent of organisations say they are currently reviewing or are about to review their overall global mobility strategies, including alignment with business issues and goals.



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In practical terms, alignment requires business leads or HR business partners to involve global mobility at the strategy table discussions where business issues are addressed, so global mobility can articulate the value assignments may bring. It also requires global mobility to engage regularly with the business, directly or via HR business partners, to provide statistics and challenges aligned to top business issues. Mobility leaders must also keep abreast of changing business drivers that may affect the way they structure their programmes and deliver services.

This highlights one of the most fundamental reasons to make talent globally mobile – to help reduce the talent demand-supply gap. For this to work, organisations must learn to bring their talent management and global mobility teams together and harness their combined power. When asked how important the talent agenda was for global mobility, between 71 and 90 percent of respondents from all three fields (business, global mobility and talent) said it was critical or important [Figure 9]. These results also align with the feedback in the 2011 strategic moves survey that stressed the importance of talent alignment.

A large global company with approximately 550 assignees conducted a review of their global mobility programme in 2009, resulting in the redesign of their programme. This included outsourcing relocation activities globally and restructuring their internal team. The key benefits at the time were cost reductions and synergies as a result of vendor alignment.

Three years later, the company encountered new challenges and the model in place was no longer fit for purpose. The requirements of the landscape had changed, including a two-fold increase in the assignee population an explosion in the volume and mix of assignees (including assignee monthly turnover), and movement of the home and host traffic lanes from a stable population predominantly moving between developed markets to the majority of moves to and from developing and emerging markets. Furthermore, the programme and support mechanisms were no longer able to meet the full requirements of the business or the assignee in these new locations, including greater complexity with regards to compliance, exchange controls, compensation management, and the need for more support to relocate and settle assignees and their families. There was now a clear gap between global mobility services offered and business and talent needs, and the current model posed a risk to the businesses ability to attract, retain and mobilise its key talent, which would ultimately affect business agility and productivity.

In order to address the gaps and challenges, the company conducted a strategic review of their programme in order to fully understand the key sources of pain and assess the business and talent drivers. This informed the design of the new optimal global mobility service delivery model as well as the level of support most appropriate for the business and assignee. The review was also able to determine immediate stabilisation requirements which could be implemented in the short term as well as larger service delivery changes. By taking a step back and conducting a review, this company was able to adapt its model to meet the business objectives.



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Talent alignment

The survey clearly showed most global mobility moves are initiated in order to fill specialist skills or resource gaps [Figure 8].

This highlights one of the most fundamental reasons to make talent globally mobile – to help reduce the talent demand-supply gap. For this to work, organisations must learn to bring their talent management and global mobility teams together and harness their combined power. When asked how important the talent agenda was for global mobility, between 71 and 90 percent of respondents from all three fields (business, global mobility and talent) said it was critical or important [Figure 9]. These results also align with the feedback in the 2011 strategic moves survey that stressed the importance of talent alignment.

Figure 8. Proportion of current international moves based on type of need

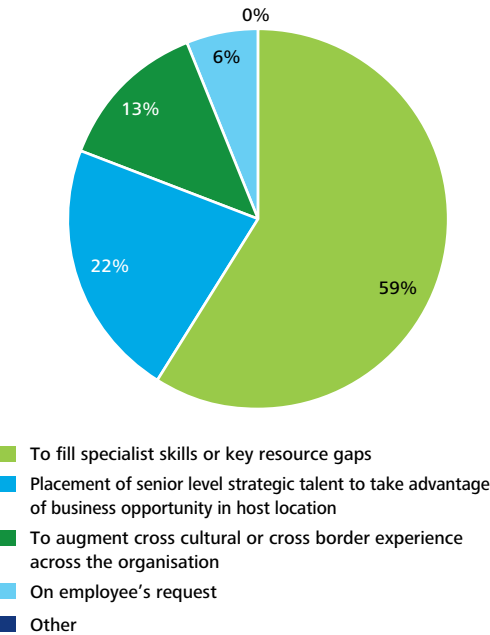
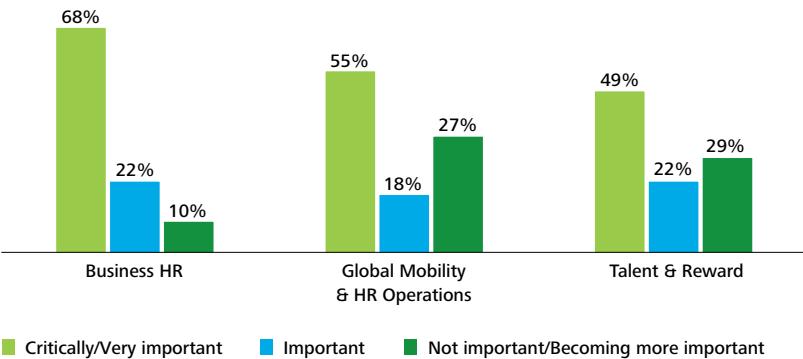


Figure 9. Importance of talent agenda as a driver for global mobility





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**Spotlight: deploying different type talent?**

**Industry variation:** The technology, media, and telecommunications industry has the highest percentage of international moves that fall into the category of specialist skills/key resource gap (75 percent vs. an average of 59 percent). The manufacturing industry has the highest percentage of international moves that fall into the placement of senior level talent (31 percent vs. an average of 22 percent).

**Regional variation:** North American organisations have more international assignments within the specialist skills/key resource gap category than organisations in Europe and rest of the world.

Yet intertwining global mobility with talent management is another opportunity many organisations are failing to seize.

The data shows talent and reward professionals feel significant to radical improvement is needed in talent management practices related to global mobility as is evident Figure 10.

Figure 10. State of organisations’ global mobility practices based on type of respondent



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Proportion of talent & reward professionals who consider talent agenda to be important or very important for global mobility

Among all respondents, there is a general agreement that global mobility needs to improve. Eighty-three percent of talent and reward stakeholders, 70 percent of business HR stakeholders, and 54 percent of global mobility stakeholders feel global mobility in their respective organisations needs to improve. This is despite the investments organisations are making in their global mobility programmes.



Proportion of talent & reward professionals who consider global mobility to be underperforming or need radical improvements

The impact of global mobility will be the highest if it is integrated with an organisation's talent agenda through initiatives such as global workforce planning and talent demand-supply mapping, which are also the key drivers for assignments. Yet global mobility practices are still being developed in isolation from talent management practices. Figure 11 gives a closer look at the views of talent and reward professionals. It highlights that between 63 and 74 percent of them feel significant improvement is required in the way global mobility is used to address talent programmes.



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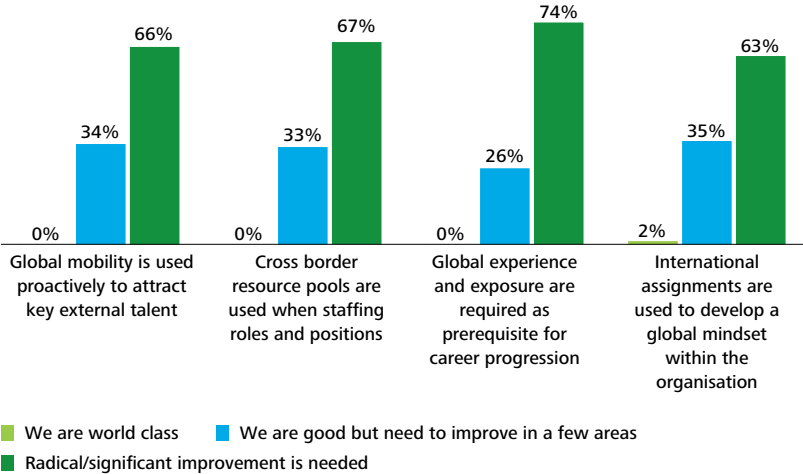
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Figure 11. Rating of global mobility practices by Talent & Reward professionals



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“We have made talent mobility a priority for years, but now we have a mix of programmes and initiatives and no long term approach for managing them in a consistent, integrated, or global manner. In short, we have a bit of a mess on our hands.”

Chief talent officer, industry-leading global company



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**There are pockets of progress.** Mobility and talent functions are starting to collaborate and integrate their activities to create assignments that go beyond simply filling gaps in local talent pools. They are creating accelerated development programmes for high potential talent functioning in a highly competitive international environment.

However, where integration is happening, the efforts may be missing the mark significantly. The survey findings highlight a disproportionate proportion of senior level assignees in global moves – which means these moves do not contribute to the development of a future leadership pipeline [Figure 12]. Entry-level assignees are the rarest, which is not surprising. Yet there are just as many executive and senior level assignees (45 percent) as mid-level ones (44 percent). Organisations may wish to consider broadening their global mobility programmes to more junior staff in order further integrate global mobility as a truly developmental tool.

With assignees like these, mobility assignments may be providing service to the business functions, but they are not fostering career development.

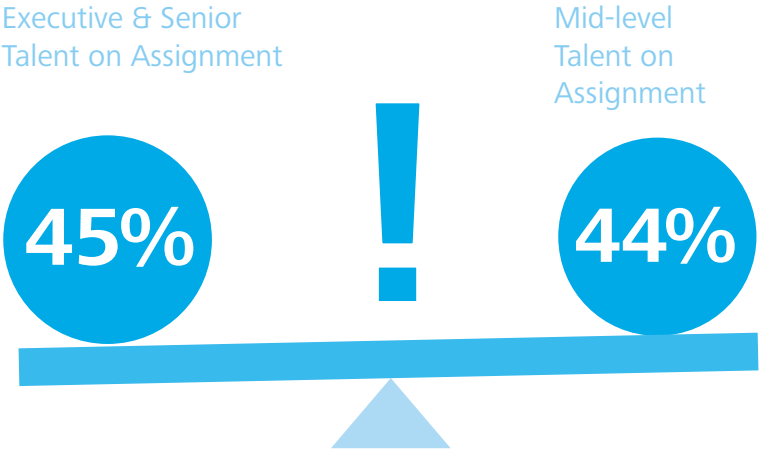
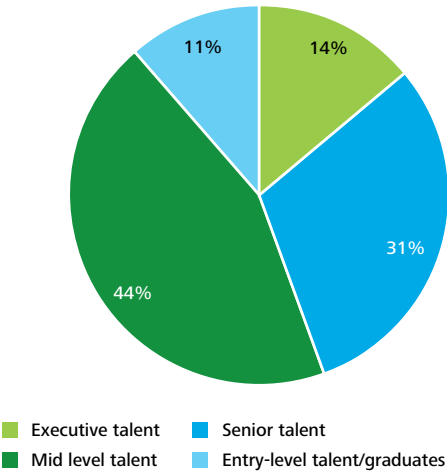


Figure 12. Proportion of assignees by level of employees



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### Compliance alignment

Of nine strategic business issues, respondents ranked “increasing regulatory pressure” fourth. Eighty-two percent said that it was “important” or “very important” for global mobility to support the resolution of this issue. However only 9 percent said they are currently using the complete potential of global mobility to address this business issue. Achieving regulatory compliance in the context of global mobility is complex and is spread over many different aspects such as immigration, taxation, social security, and payroll. It would be imprudent for global mobility not to integrate fully with these services across borders.

Organisations that meet this challenge effectively use subject-matter experts they either employ or retain. However, this does require continuous interaction with multiple internal teams or vendors. As the number of assignees and their destinations increase, the complexity of regulatory compliance will increase arithmetically.

Regulatory compliance was third out of 10 issues related to global mobility in the 2012 survey – compared to 2011, when it was the sixth most pressing issue. Interestingly, when asked to select barriers to global mobility, respondents ranked “immigration legislation and related regulations” third out of six. Global mobility functions can benefit from establishing closer ties with their HR, finance, payroll, and legal functions and with their vendors to overcome this specific barrier to increasing effectiveness.

### The way forward

Global mobility is a fusion of many interrelated disciplines such as workforce planning, recruitment, performance management, learning, succession planning, diversity, incentives and rewards, and compliance. In order to strengthen global mobility, all parties must have a mutual understanding about how their programmes can be better supported and fully understand the interdependencies. This will support the definition of overall mobility goals and how to deliver them.



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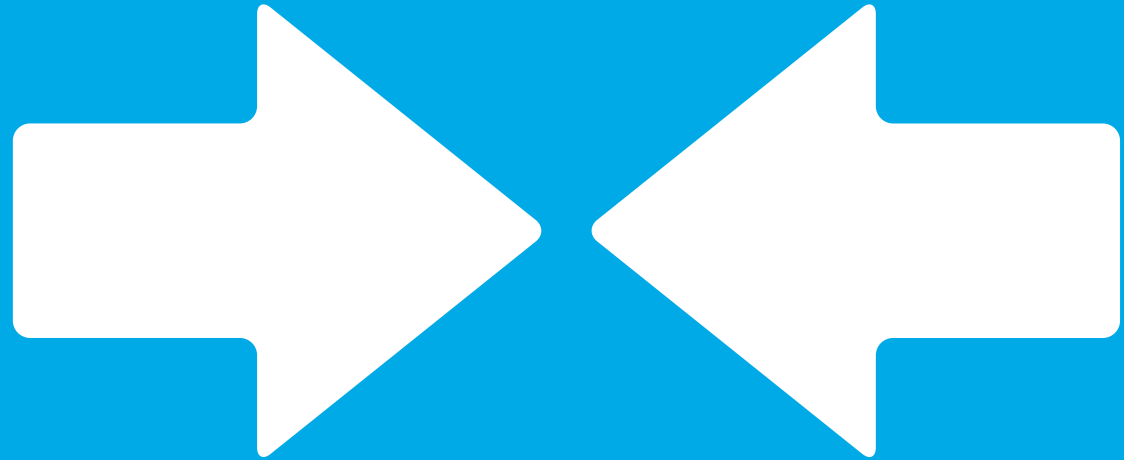
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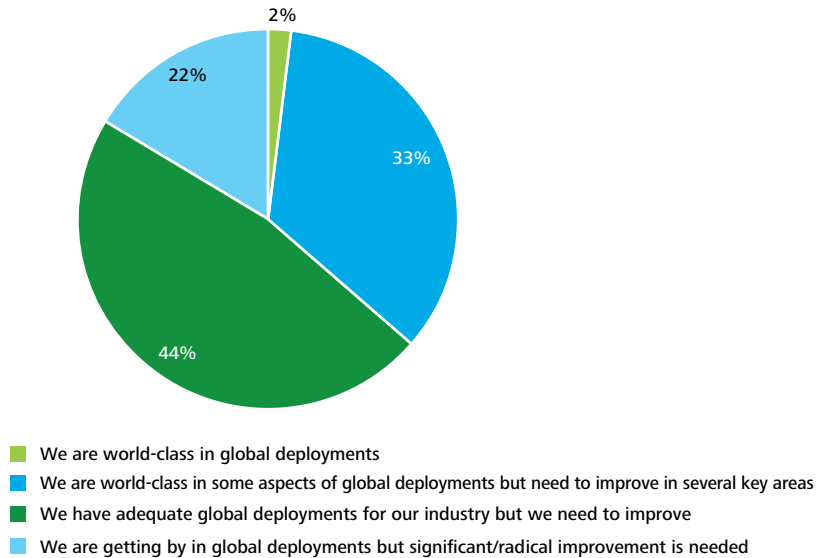
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Figure 13. Overall position of organisations’ global mobility practices currently



**Spotlight: The more the merrier?**

The business satisfaction with an organisation’s global mobility practices increases with the number of international assignments. This demonstrates economies of scale within global mobility practices.

**Measurement**

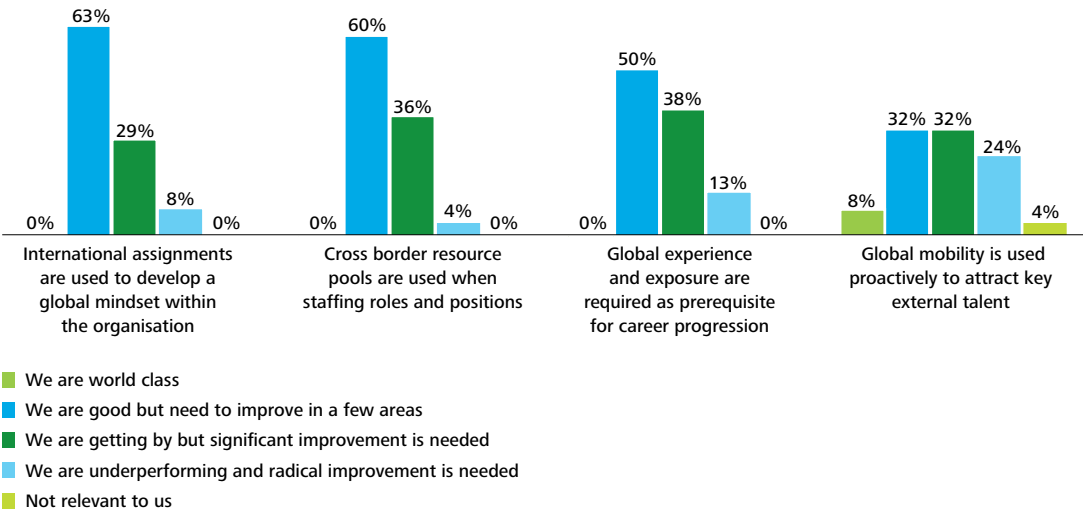
The majority of organisations surveyed are well aware of the current limitations of their global mobility programmes from a practical as well as a strategic standpoint, but they are not translating that awareness into improvement and change initiatives: only 2 percent see themselves as world-class [Figure 13], yet only 12 percent report that they perform clear assessment of their mobility practices and link those assessments to improvement efforts [Figure 15].

Taking a closer look at key focus areas such as talent, the overwhelming response was also negative. Of those organisations who rate talent as critically important, the majority do not rate themselves as world class in the use of global mobility practices for talent purposes [Figure 14]. Many rate themselves only as good. Echoing the results from the 2011 survey, this indicates there is still a large gap between where organisations are now and where they want to be in terms of global mobility.



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Figure 14. Use of global mobility for talent management practices and maturity of these practices

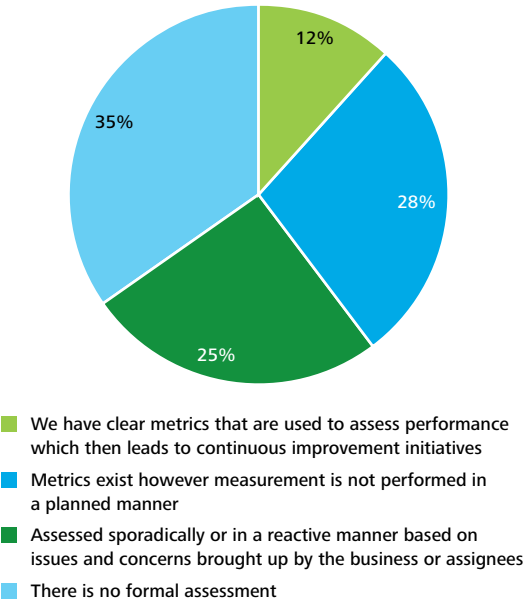


Yet in spite of this widespread recognition of the need to improve, the vast majority of organisations surveyed (88 percent) are undertaking only a limited assessment of their mobility practices. This is a surprising result given the amount spent on international assignments each year. Global mobility and HR leaders should ask themselves: Would other HR areas, such as reward, learning and development, or talent management, experience similar neglect if they were found wanting?

By failing to assess and measure global mobility practices in a planned and regular manner, organisations are missing the chance to fully understand their difficulties and learn how to overcome them. You cannot strengthen an ability if you won't even measure the ways it's deficient.

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Figure 15. Extent of measurement of global mobility practices

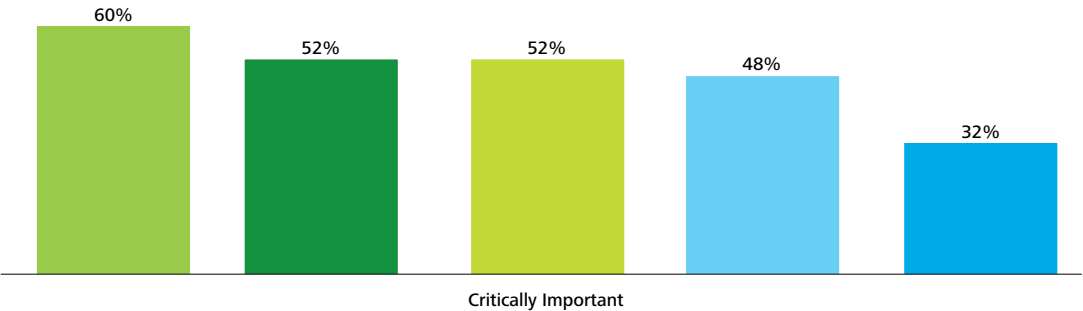


Even in the areas rated as top mobility challenges, such as integration with global talent management practices, the results suggest few metrics are being used. Compared to the 61 percent who rated the impact upon talent metrics as a top mobility challenge, only 34 percent of companies are undertaking some kind of measurement of it.

Perhaps more surprising, of the “talent hawks” who identified talent as a *critically* important driver for mobility within their organisations, only 60 percent are measuring the impact of mobility on talent metrics such as employee engagement and leadership pipeline. Only a handful more than 50 percent of the “talent hawks” look at service measures such as assignee satisfaction, which can also affect assignee retention and performance. It’s true the “hawks” measure talent impact more frequently than they do any other global mobility metric, but given their stated priorities, it’s still surprising they don’t do even more [Figure 16].

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Figure 16. Measures used to assess global mobility amongst respondents who rated talent as a critically important driver for global mobility



- Impact on talent metrics such as employee retention, employee engagement, talent-pool/leadership pipeline etc.
- Impact on business results such as market share, time to market, new services/products/markets, top-line/bottom-line parameters, customer satisfaction/retention etc.
- Service measures such as internal customer (assignee/business) satisfaction, proportion of escalations, proportion and number of non-compliance issues, proportion of assignments cancelled due to process issues etc.
- Cost measures such as cost per assignment, cost of global mobility service delivery, global mobility team cost, vendor or vendor services costs etc.
- Operational measures such as end to end cycle times for processes and sub-processes, transaction volume handling capacity, proportion of transactions completed beyond SLA, assignee to global mobility headcount ratio etc.

Cost – the most commonly cited barrier to global mobility – is measured by only 45 percent of the organisations surveyed, and is measured in a regular, planned manner by fewer than 10 percent.

Overall, these results indicate survey respondents lack clarity in determining which metrics they should use to assess whether their programmes are meeting strategic objectives. This is another symptom of the disconnect between a stated desire for strong mobility programs and the failure to make them a reality.

The deficit may arise for several reasons – ranging from a lack of understanding of the appropriate key performance indicators for the programmes based on strategic goals to more practical aspects such as access to appropriate data sources or data analysis capability.

In terms of the range of metrics organisations are using, those who rate themselves more maturely in the use of metrics are taking a more holistic approach and measuring across a number of variables, whereas those who take a less mature, more reactive approach to metrics are more likely to measure only cost [Figure 17].



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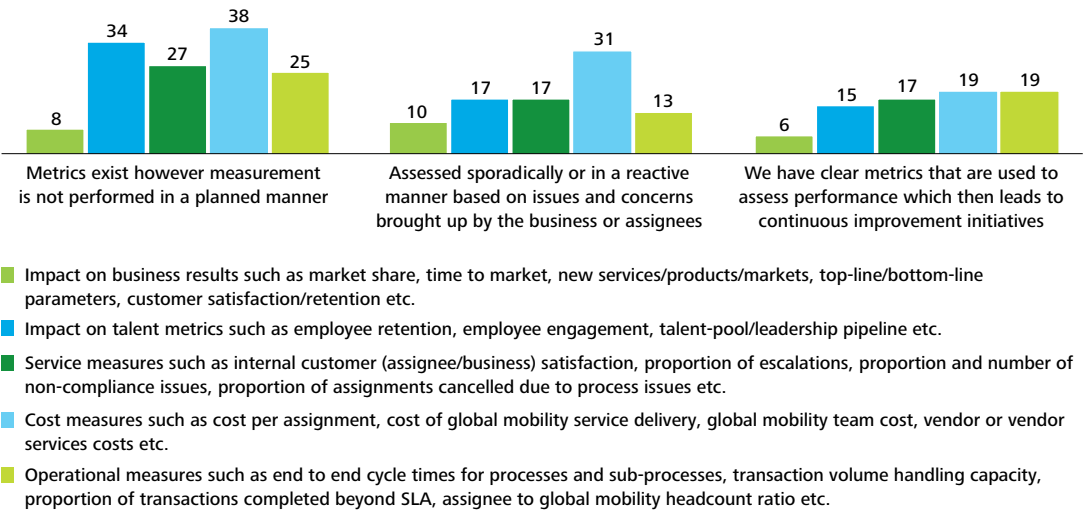
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Figure 17. Number of times different measures are used based on maturity of how such measurement is leveraged



This should ring alarm bells. To measure programme costs in isolation from operational, service, talent and business outcomes makes it impossible to assess each global mobility assignment as an investment with a return. The returns are harder to measure, but they are there, and should count.

Viewing mobility through this narrow aperture can create a constant pressure to reduce costs without considering the wider impact of reduced mobility services or assignment benefits – for both assignees and the business.

It keeps the organisation from considering why it's using global mobility in the first place and thinking more creatively about alternative options that may achieve the same end goal. If cost is the only thing you measure, cost pressure will be the only factor that drives high-level decisions.



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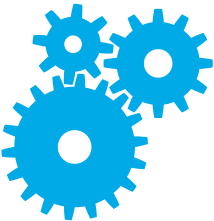
**Spotlight: strategic measuring global mobility differently?**

**Industry variation:** Financial services organisations are most likely to use clear metrics to assess global mobility practices. Life sciences, and health care organisations are the least likely to use them.

**Regional variations:** North American organisations are the most likely to have no formal assessment of global mobility practices.

(Although)

54%



cited improving operational efficiency as a top mobility challenge

(Fewer than)

10%



are using operational metrics for continuous improvement

(Only)

29%



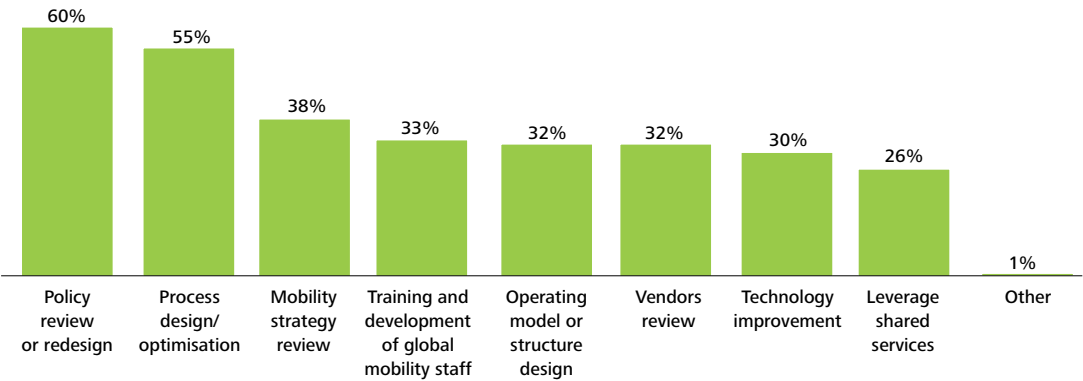
are looking at operational metrics in anyway at all

**Self improvement**

Given the low incidence of regular and planned reporting that leads to continuous improvements, it's not surprising to find many of the respondent organisations also appear not to be undertaking appropriate improvement activities. Although 54 percent of respondents cited improving operational efficiency as a top mobility challenge, fewer than 10 percent are using operational metrics that lead to continuous improvement, and only 29 percent are looking at operational metrics in any way at all.

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Figure 18. Popularity of different type of improvement initiatives currently underway



Where companies are undertaking improvement activities, the main focus appears to be on policy and process review and redesign. However, it's worthwhile to consider the correlation between current mobility challenges and improvement activities underway. There is an appropriate correlation between policy improvement activities and those organisations that have challenges in the areas of leadership, talent and business alignment, but policy improvement is also the most common activity for organisations that have issues with tracking and managing costs.

Conversely, activities such as process optimisation and operating model redesign, vendor review, and use of shared services centres – which can help to improve programme operational efficiency and reduce operating costs – are aligned to challenges such as business alignment and leadership development.

Once again, even the organisations that put effort into honing global mobility capabilities seem not to be applying their efforts where they will do the most good.

That isn't to say policy changes can't reduce cost. The more significant portion of total assignment costs resides within the assignment package and tax costs, rather than operational programme costs.

However, companies will achieve very little if a short-term focus on cost overrides the main purpose of the assignment, which according to the survey results is resourcing specialist skills gaps or for strategic business purposes.

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**Case Study:** Over the past 18 months a UK based FMCG Company has been undertaking a transformation of its global mobility operating model in order to improve alignment between its strategic mobility goals and global mobility practices. The key goal of the transformation activities is to improve the assignee experience of mobility and determine it is consistent regardless of nationality or home country, after a wide-scale assignee survey revealed issues with the clarity, transparency and equality of the assignment package, and the number of stakeholders and vendors involved in the end to end assignment process. Transformation activities have included the introduction of an innovative international salary structure for its executive cadre and the increasing number of 'global nomads' on consecutive assignments, as well as a new host based assignment policy for first time assignees. These new policies aim to make the assignment packages easier to understand, and create equity between assignees and with host country peers, and amongst the global leadership.

To further enhance the assignee experience, the company has changed the way it delivers services to assignees. First time assignees are now handled by a dedicated global mobility service centre, whilst global leaders and global nomads are provided with a personalised concierge service, to remove the hassle of dealing with multiple vendor contacts. These changes recognise the importance of international assignees to realising the company's global business plans, and the need to provide them with ample company support in order that they can add value in their new role from day one.

Additionally, the company has implemented a new global mobility technology system, which does not just act as a workflow tool, but also captures assignee performance data, assignment cost and payroll data. Over time, this new technology will allow them to more accurately capture total assignment costs, assess the extent of their investment in international assignments and confirm that it is being spent on the right individuals.

The company has been both ambitious and creative in its endeavours to bridge the gap between the strategic goals of global mobility and the achievement of these goals in practice. Whilst it is currently too early to assess the full impact of the operational changes, they show how global mobility can transform itself to become a strategic business partner through self-assessment and usage of appropriate transformation activities.



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### What is the way forward?

In order to align global mobility to business and talent strategies, companies need to define what they want to achieve, make a regular assessment of whether they are achieving it, analyse the gap, and make plans to close it. Based on the survey results, it is clear the majority of organisations that responded to the survey are not doing this. In summary, organisations need to:

1) **Agree upon the strategic purpose of global mobility** within their organisation and define what great looks like to all key stakeholders. Once this has been established, the appropriate strategy can be agreed upon and improvement roadmaps developed. This may require better integration of various technology systems, processes, policies, vendor capabilities, and overall use of data analytics amongst other initiatives.

- 2) **Understand the value proposition of global deployments:** Take time to look at who they are sending on assignments and why and how this fits in with the individual business units growth and talent plans. This will involve the use of appropriate candidate selection, assignment justification, and assignment approval processes. There may be alternatives to mobility in many cases such as through talent acquisition and talent retention strategies. Likewise, assignment extension, early repatriation, and assignment failure should be investigated to see to it that assignment costs are not being wasted.
- 3) **Enhance the use of mobility data analytics.** Not only report on cost, but look at it alongside other metrics. If total assignment costs go up slightly but all strategic KPIs are being met, then the additional investment is likely to be worthwhile to the organisation. Likewise cost reductions should not be made if they will lead to missed KPIs in other areas.





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### Visions for the future

Business leaders say they want their organisations to realise the demonstrated benefits of transforming global mobility. Yet business executives and HR leaders alike continue to voice frustration with global mobility's ability to deliver value. With no shortage of talented people doing great work, what is the problem? All signs point to the need to rethink how organisations deliver global mobility with the intent of supporting the business and talent strategy.

### The business wants more – not less – from global mobility

Most business leaders today fully understand the value of people. They can clearly articulate their top people priorities by either role or geography and are more than willing to invest to get what they need. At the same time, HR leaders know they have to deliver what the business needs and wants. As a result, when business and HR leaders sit down to work together with mobility and talent, they are often met with a focus on the “now and how” and less on what needs to be done over the next three to five years. Predictably, business leaders want better, faster, and more compliant mobility services at a lower cost. They want a mobility and talent function that can be flexible and nimble to support their ever-changing business strategies and solve their global workforce skill supply and demand gaps both today and in the future. Unfortunately, many organisations continue to struggle to meet these objectives.

Most global mobility or talent leaders can point to at least one innovative service they developed to solve a critical business challenge. Their stories have a familiar theme: the work required a lot of cooperation, goodwill, and effort. Talent and mobility people stepped up to the challenge to get something important done. The examples are hard to replicate because they required huge commitments of time and energy. Similarly, many organisations have gone through internally led global mobility transformation programmes. By design, these programmes come to an end point at which the transformation of current mobility services (or the development of new mobility services) stops. There is rarely a structure in place to sustain the cycle of continuous performance improvement. These two scenarios illustrate a fundamental dilemma.

On one hand, most business leaders understand the value of deploying people across borders, and they are willing to invest in these moves more than ever before to meet their business objectives. Yet on the other hand, they are not prepared to take advantage of this opportunity by making ahead-of-the-curve investments in their current talent mobility frameworks, strategy, roles, and processes without the comfort that they will solve their longer term skill supply-and-demand talent gaps. Business and HR leaders understand this dilemma and want a solution to this problem.



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### Looking ahead

The solutions to this problem lie in the fact that many organisations struggle to understand the way today's mobility business partners and centres of expertise should interact with their mobility operation and talent teams to contribute to such business challenges. In particular, the way that both mobility and talent functions are structured and positioned can be a fundamental challenge to achieving true business alignment. Organisations understand the value in bringing together mobility business partners and centres of expertise with mobility operations and talent teams to operate like a business-focused internal global mobility consultancy on specific projects and initiatives. In this model, mobility business partners and centres of expertise form the vertical "go-to-market" account management teams, with the mobility and talent operations forming the horizontal specialist teams.

### New capabilities required

This model highlights the longer term challenge that global mobility is still missing one key element in its scope of services: an overlaying ability to develop strategic initiatives (or 'propositions') in alignment with specific business priorities. These propositions respond to critical long-term strategic organisational capabilities such as M&A activity, change acceleration, culture change, talent gaps, and growth. Given the business challenges leading global organisations face this new area of strategic focus should be in the area of global workforce management –

the strategic management of an organisation's global supply and demand of skills and talent. This will require the creation of new capabilities (figure 19) within global mobility to drive global workforce planning improvements across the entire organisation.

Figure 20 shows how global mobility's capability requirements are a function of two parameters: firstly, the functional maturity of the organisation in terms of the adoption and investment in Global MIS technology to provide HR transactional delivery, and the ability to report on key employee metrics. Secondly, against an organisation's strategic talent investment. That is to say an organisation's ambition and ability to invest ahead of the talent demand curve to grow the required supply of talent to fuel business growth in their priority markets. When both these requirements are high, organisations should supplement their target capabilities of both global mobility management and global mobility business partnering with that of global workforce management.

Conversely, organisations that either do not yet have the functional maturity of a supporting HR infrastructure or the ambition to invest ahead of the talent demand curve will need to either invest in such capabilities or face the reality that their future business growth in their priority markets will be constrained by their lack of ability to source, recruit, or deploy the required talent to such markets.



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Figure 19. Global workforce management capabilities

We believe that by developing such capabilities in global workforce management it will expand the scope of global mobility to include the following:

Capabilities

- 1

**New markets**
  - Rapid expansion
  - Talent acquisition
  - Global mobility
- 2

**Workforce efficiency**
  - Workforce analytics
  - Culture
  - Scheduling
  - Development
- 3

**M&A**
  - Onboarding
  - Integration
  - Organisational design
  - Change management
- 4

**MIS & Technology**
  - HR technology
  - Talent technology
  - Global mobility technology

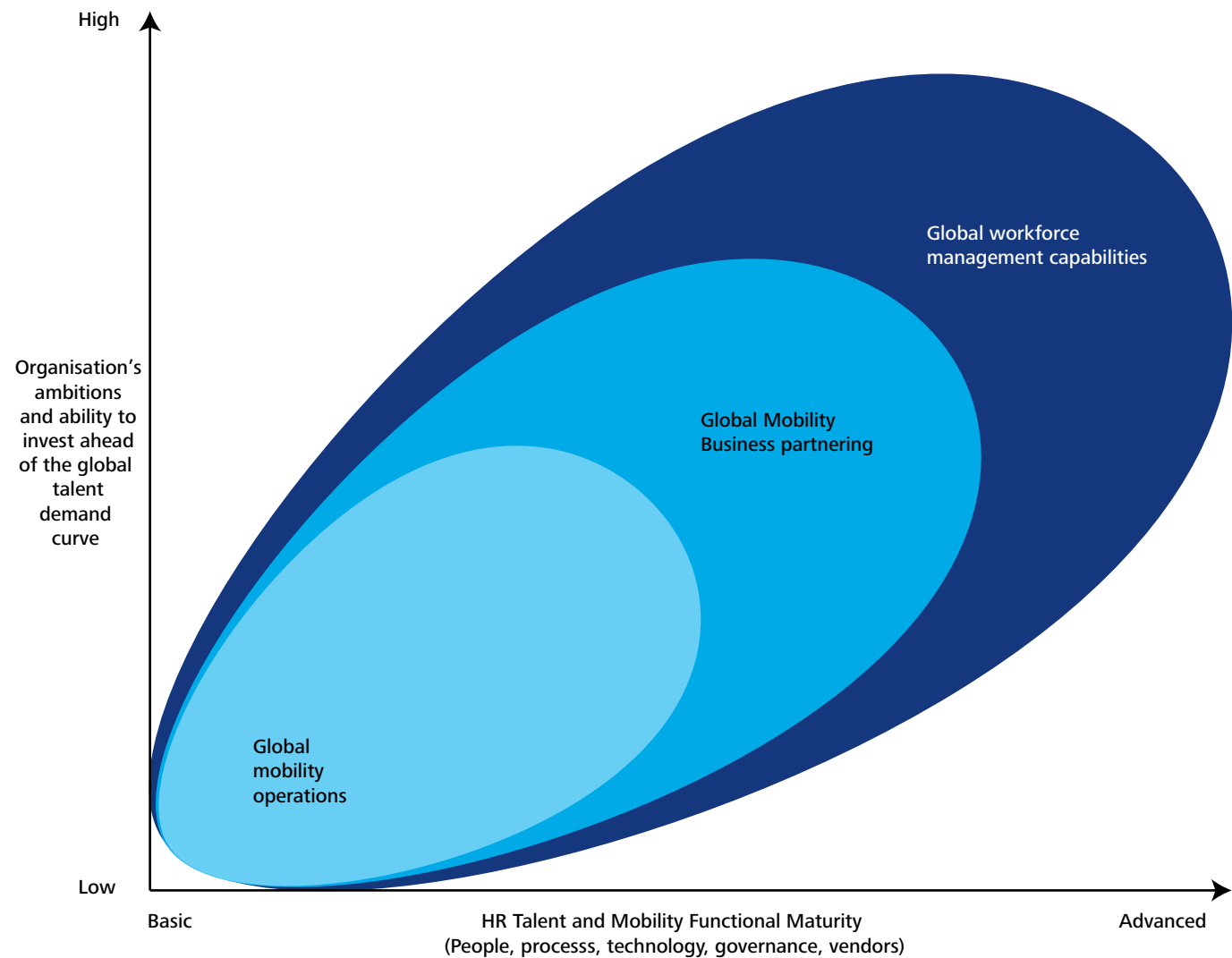
Scope

- Design, development, and implementation of new Global workforce management services
- Development and implementation of business-focused Workforce metrics
- Delivering reliable workforce data with corresponding workforce reporting and analytics
- Project management, including building capabilities for Mobility and talent to manage projects, such as Six Sigma in HR
- Development and implementation of an integrated mobility and talent technology strategy to support the business workforce planning objectives

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Figure 20. Global mobility target capability requirements



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### Developing global workforce management capabilities

In terms of developing the capabilities required to manage global workforces we believe that broadly speaking this will require fusing together the disciplines, of talent, mobility, workforce planning and HR technology to solve the critical business issues (such as growth, M&A, new market entry) relating to global skill supply/demand talent gaps.

### What does this mean for mobility teams, mobility business partners, and centres of expertise?

**Alignment to business challenges.** If global mobility is ever to truly meet the objectives of the business, it needs to move away from traditional, functionally aligned roles to business-aligned roles that can support the projects and programmes that the business is focused on. With alignment on solutions for business challenges like global workforce management, the mobility teams and centres of expertise can finally close the gap and align with the business by solving their critical business issues. This does not mean the end of traditional mobility teams and centres of expertise, but it does require organisations to rethink the way they provide support for both functional and business focused objectives and supplement these functions and roles with new global workforce management capabilities.

This will also require investment both in wider functional capabilities such as global standard reporting and HR technologies, together with the ambition to invest ahead of the talent demand curve to create the required supply of talent.

### What does this mean for global mobility and talent as a whole?

**The skills make the difference.** For mobility and talent to ever be considered true strategic business partners, they require additional capabilities delivered through focused global workforce management skills. This would allow them to operate at senior levels of the organisation to orchestrate solutions designed to solve organisational global talent skill supply-and-demand priorities. To achieve this, it is critical that the organisation recognise global workforce management as a business critical capability. Only when the global mobility can initiate a strategic conversation with business leaders, armed with potential global workforce management solutions to solve their most pressing talent supply-and-demand gaps, will he or she and global mobility as a whole be thought of as a strategic player.



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“They always say time changes things,  
but you actually have to change  
them yourself.”

Andy Warhol



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### What will it take to create global workforce management capabilities?

**Get the basics in place first.** Global workforce management cannot be fully functional, or credible, without the provision of reliable HR transactional delivery and underlying foundations such as standardised reporting, technology, and policies.

**Prepare the line manager.** Facilitate the mindset change of the line manager, who may not be initially willing or ready to team with a newly defined mobility and talent role.

**Be clear about the capabilities.** Clearly describe the types of business outcomes global workforce management should focus on delivering.

**Match the person to the role.** Focus on the skills and experience it takes to be credible and trusted as a global workforce manager.

**Focus on the business requirement.** Keep the desired business outcome visible as you go. It takes time: Focus on quick wins first, but don't bite off too much too soon.

Vesting this responsibility in newly minted global workforce management capabilities is a big change that will neither permit nor reward an incremental approach. You cannot phase global mobility into this role over time. You cannot pilot it. These new capability requirements will require a depth of conviction from CHROs who know they are not yet delivering the services that the business needs. But the effort is worthwhile.

Positioned appropriately, global workforce management can be the key to solving an organisation's long-term skill supply-and-demand talent gaps. There is tangible value to be realised, but it will likely take a departure from the current model and a strong vision of the future in order for organisations to truly align mobility and talent with their wider business and talent strategies.





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Visions for the future of global mobility

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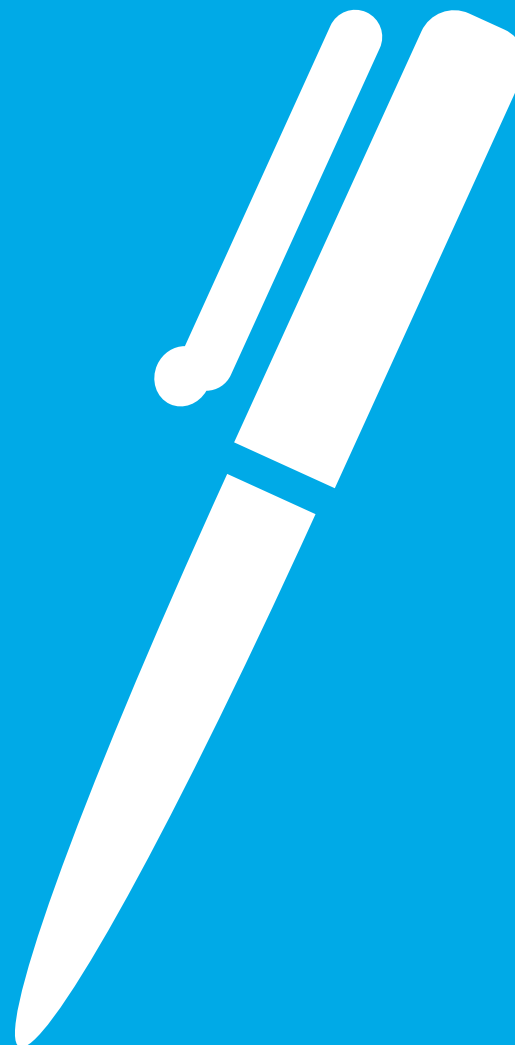
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### About the survey

#### Survey Demographic Information

The Strategic Moves survey was conducted by Deloitte in the UK in collaboration with Deloitte member firms worldwide. Data was collected in the form of an online survey as well as various follow-up interviews. Most of the data was collected between May to September 2012.

The focus of the survey in 2012 was to understand how organisations are integrating their talent mobility practices with their wider business and talent strategies. The target audience for the survey was senior HR professionals – heads of HR, talent, reward/C&B or mobility and senior HR business partners.

The research included 195 participants worldwide. Participants represent all major regions across the world with Europe (44%) and North America (35%) as main contributors whilst the remaining has been grouped into one group termed as 'rest of the world' (21%).

Participants were requested to classify their roles into the provided categories. These were then subsequently grouped into three different role types. These roles are global mobility and HR operations (50 percent), business HR (25 percent), and talent and reward (25 percent).

A broad variety of industries are represented, with a large representation in manufacturing (22 percent), financial services (19 percent), and technology, media, and telecommunications (18 percent).

More than a quarter of the organisations surveyed have annual turnover of more than US\$10 billion. Similarly more than a quarter of the organisations have more than 500 international assignees.



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Comparison with the 2011 Strategic Moves survey

The number of participants has increased from 141 to 195, mainly due to an increase in the number of respondents from Europe and North America. As a proportion, the group 'rest of the world' is less represented compared to the 2011 Strategic Moves survey (46% in 2011 vs. 21% in 2012).

The other important factor is that the participating organisations from the 2012 survey are larger. They therefore have higher revenue and more international assignments.

Figure 21. Proportion of participating organisations by region

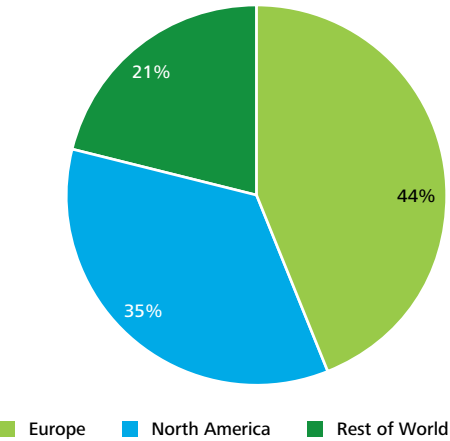
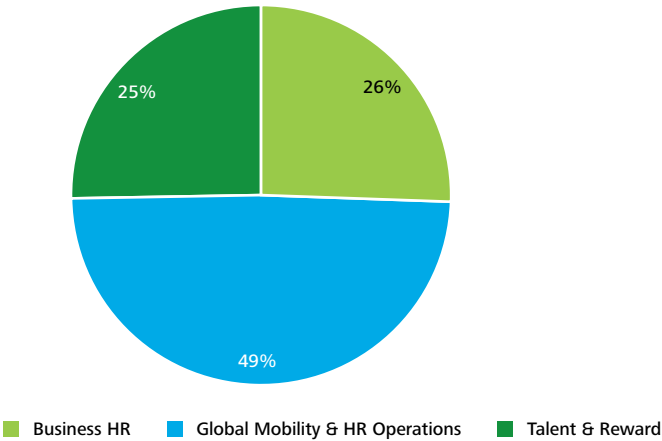


Figure 22. Proportion of respondents by their role



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Figure 23. Proportion of participating organisations by type of industry

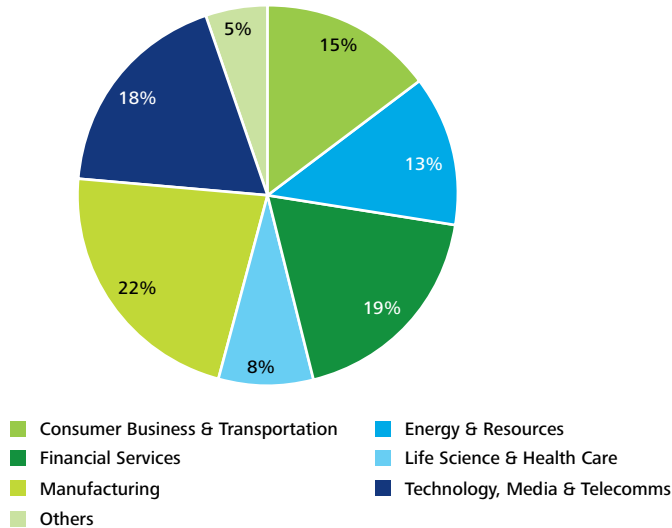


Figure 24. Proportion of participating organisations by their revenue

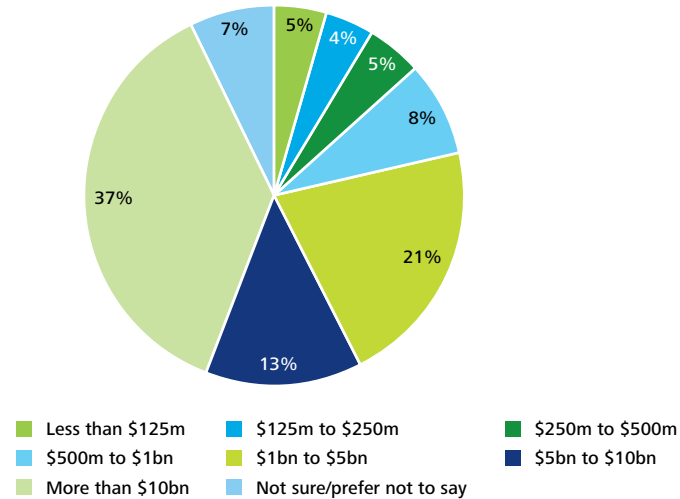


Figure 25. Proportion of participating organisations by employee population

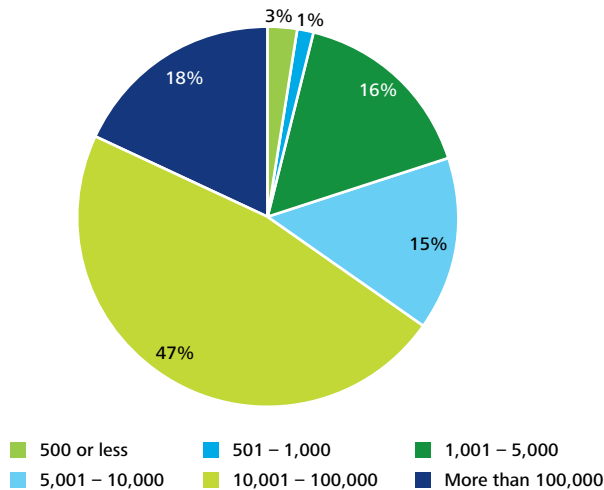
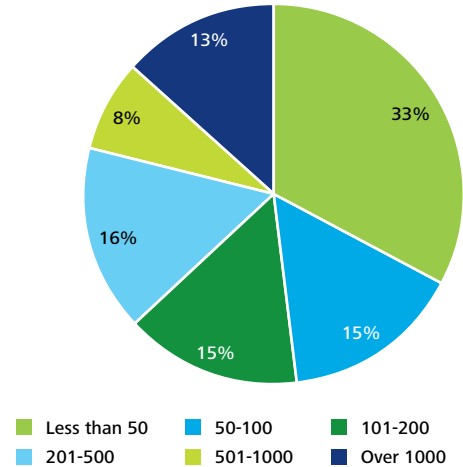


Figure 26. Proportion of participating organisations by number of international assignees



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