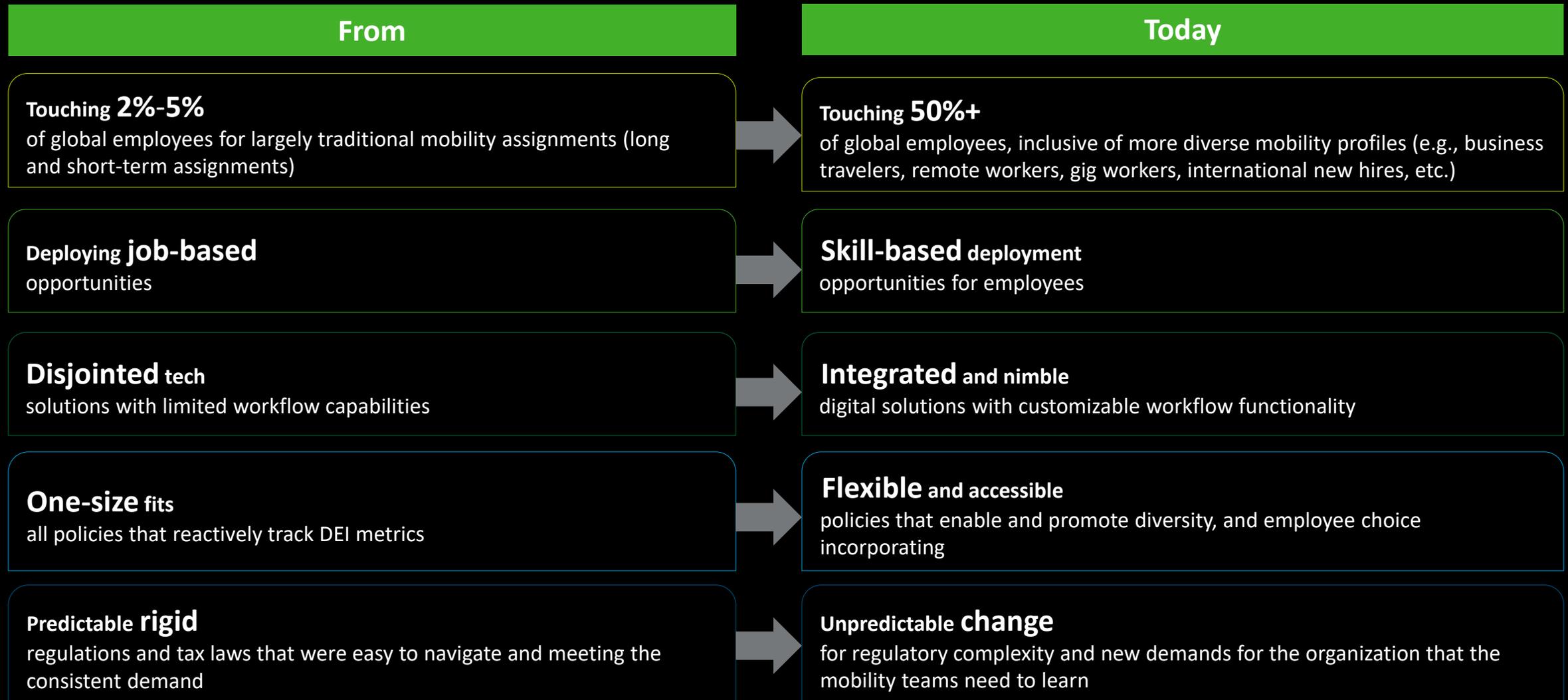


Global workforce trends

November 2023

Today's Evolving Market Landscape

Global Talent Mobility plays a critical role in enabling a newly complex and dynamic global workforce. Many organizations are evolving to satisfy the rapidly changing needs of the business and the growing workforce it serves.



2023 Global Workforce Trends

The demand for global movement

Borderless Skills-Based Movement

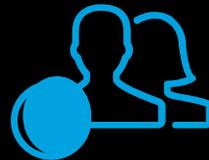
In a world where talent shortages are one of organizations' **most daunting challenges**, Global Talent Mobility can **tap into** a broader talent pool—and reduce recruitment cost—by matching candidates to opportunities **based on skills** and not geography.

Expanded Risk

Financial, operational and compliance risks are familiar territory for organizations, but **societal, environmental, and personal safety risks** are creating new organizational demands, and are considered a top priority by many **Talent mobility leaders**.

Growing Distributed Workforce

Changes to **how and where** work gets done, and the values it aligns to have had a profound impact on Global Talent Mobility programs, challenging teams to **align with stakeholders** across the organization and display extreme agility. Strong **program leadership** and a **jointly defined mission with employees** are critical.



Ecosystem optimization

Enable with Technology

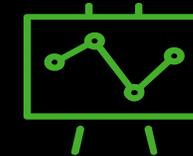
Global Talent Mobility can enable today's dynamic and disperse workforce through **the right technology strategy**. By prioritizing integrated technology solutions, organizations can address a wide range of risks and optimize processes, costs and employee experience.

Data-Driven and AI-Powered Insights

New technologies such as AI have evolved significantly over the past few years, and digitized data has grown exponentially. Global Talent Mobility has the opportunity to tap into these insights and technologies to improve **employee experience, compliance, and cost efficiency** with a well-defined data strategy.

Do More with Less

Global Talent Mobility teams need to **prioritize efficiency and scale** while still considering purpose-driven initiatives such as diversity, equity and inclusion (**DEI**) and **sustainability**. As result leaders are taking a fresh look at their available resources and embracing new approaches.



Borderless Skill-Based Movement

Organisational challenges

Organisations may face an **urgent need to overcome talent shortages**; they may need to **rethink how they fill in opportunities** by sourcing talent **without geographical limitations** and enhancing skillsets through cross-border opportunities.

The demand for global movement

Workforce trends



71% of CEOs surveyed have cited talent shortages as their **top external challenge** to meeting their business objectives¹



93% of leaders said that **moving away from a focus on jobs is important or very important** to their organization's success²

(1) 2022 Fortune/Deloitte CEO Survey (175 leading CEOs within 15 industries) – Winter 2022.

(2) [2023 Global human capital trends | Deloitte Insights](#).

Expanded Risk

Organisational challenges

Beyond the operational, financial and compliance risks that organizations are **generally set up to mitigate, external disruptive risks** such as environmental, social, and political conditions can greatly **impact how and where work is done** and how supported employees feel within their roles.

The demand for global movement

Workforce trends



81% of organizations shared that **anticipating and considering broader societal and environmental risks** when making workforce decisions is important to very important to their organization's success¹



Yet only **19%** of organizations feel **ready to anticipate and consider** broader societal and environmental risks when **making workforce decisions**¹

(1) "Elevating the focus on Human Risk", Deloitte Insights, Jan 9, 2023

Growing Distributed Workforce

Organisational challenges

The pivot toward distributed work **has increased** the scope and impact of Global Talent Mobility. **Hybrid / Remote Work** programs rely on Global Talent Mobility's ability to effectively partner with a **diverse group of stakeholders and bring increasing complexity**.

The demand for global movement

Workforce trends



43% of organizations want to focus on **aligning their mobility program** with talent strategy¹



47% of organizations believe that by **adding headcount to their mobility team** it would allow them to **administer** their mobility program more effectively¹



80% of organizations shared that they allow **some level of remote and hybrid** model for their employee's ways of working²

(1) 2023 Airnic Workforce Globalization, Mobility Outlook Survey.

(2) 2022 Global Remote Work Survey

Organisational challenges

An **increasingly dispersed** workforce means new employer obligations--many of which are **complex, unclear, and inconsistently** enforced. To **manage the complexity**, organizations have an opportunity to **reimagine the use of technology solutions** and make strategic technology choices that solve for diverse fact patterns.

Workforce trends



46% of organizations shared that **policy and regulation** are the top challenges to enable cross-border remote work¹



93% of business leaders believe that using **technology to improve** work outcomes and team performance is **very important or important** to their organization's success²



22% believe their organizations are **very ready** to use technology to improve **work outcomes and team performance**²

(1) *a2022 Global Remote Work Survey*

(2) *2023 Global human capital trends | Deloitte Insights*

Organisational challenges

Organisations **aggregate large data** sets, many of which are underutilized because they span multiple systems or are difficult to analyze. By **centralizing data and enhancing data quality / reliability**, it is possible to gain insights that drive **policy development, enhance compliance, promote DEI outcomes, and measure ROI**.

Workforce trends



83% of organizations believe that leveraging worker data to create **benefits for both the organization and its workers** is important or very important to their organizations' success¹



Only **19%** of organization believe they are **very ready to leverage** their worker data¹



86% of business leaders say **measuring DEI outcomes** is important or very important to their organizations' success²

(1) [2023 Global human capital trends | Deloitte Insights](#)

(2) [2022 Deloitte Workforce Solutions DEI Survey](#)

Do More with Less

Ecosystem optimization

Organisational challenges

In a tight economic environment fewer resources may be allocated **to internal functions**, including Global Talent Mobility, **although pressure to demonstrate value remains high**. Teams are balancing the demands of **optimization, expanded scope, and purpose-driven program choices**, all while controlling costs.

Workforce trends



75% of organizations believe that **using new or enhanced technology** would **allow them to manage** their mobility program more efficiently¹



Only **28%** of organization want to **concentration on simplifying administration and streamlining operations** for the next few years¹



51% of organizations expect to **see an increase** with their **overall global mobility activity**¹

(1) 2023 Airnic Workforce Globalization, Mobility Outlook Survey



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