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2018 Nordic Global Mobility Survey

This year several organizations in the Nordics were asked to participate in a Global Mobility Survey to identify mobility trends in the region. The objective of this Survey is to allow companies to see what is happening in the Nordic market, and to gain some insight into where the market is going. This allows companies to remain competitive.

The survey represents each of the Nordic countries fairly equally, with 21% of respondents headquartered in Denmark, 29% in Sweden, 17% in Finland and 24% in Norway.
Introduction
– The future of mobility

The results of our survey have shown that a key focus area for Mobility in the Nordics is the transition from an operational function to a strategic business partner. With this, we can expect an increased leverage of technology and an increased use of data analytics, as Mobility takes a leading role in monitoring program performance, as well as an emergent role in aligning talent and business strategy.

Furthermore, the employee experience continues to be an important aspect of Mobility. We expect to see organizations making efforts to streamline vendor initiation, processes and the service delivery model in general in order to enhance the employee experience through the creation of consistency.

We also see a trend in the type of assignments; organizations are moving away from long-term assignments and introducing more short-term assignments, commuter and business traveller policies, indicating a growth in shorter but perhaps more frequent cross-border travel. This may further raise the need for implementing technology to monitor travel and compliance, especially when the introduction of alternative assignment policies and monitoring compliance have been rated as the biggest challenges for Mobility.

It’s a time of change and growth for global mobility in the Nordics. This report includes recommendations from Deloitte on how to manage these changes and stay at the forefront of what is happening in the market.
Priorities & Challenges

Global Mobility Priorities
Global mobility priorities show what companies are focusing on to develop their Mobility program and gain traction in the market, both with regards to business and talent development.

Today, Mobility is focused on increased business partnering, program controls and consistency in processes. This indicates that organizations are moving towards having a more structured approach to mobility and that Mobility is moving away from being an operational function and towards being a supportive function within the organization.

The implementation of clear and consistent mobility procedures throughout the organization is guaranteed to lead to improvements, such as streamlined processes, increased allocation of responsibility amongst mobility stakeholders and ultimately, a level of consistency that allows the mobility program to adjust to fluctuations in assignee volumes and adapt to new locations and situations. Once the groundwork is set, exceptions can be managed more easily.

Having clear processes is crucial in order to have control over the different compliance obligations, both internally and externally. Equally as important is the fact that mobility involves many different stakeholders whom should have responsibility over different parts of the process. Process flows and checklists are useful tools to remain on top of different obligations.

Furthermore, the role of Global Mobility as a consultative support is key to creating an alignment between business and talent strategy, in order to make mobility an asset for the business.

On a scale from 1 to 3, please rate the priorities for Global Mobility within your organization?

KEY (1= highest priority, 3= lowest priority)

1. Business partnering
2. Program controls
3. Consistency

Please rate the top 3 challenges you are facing in Global Mobility on a scale from 1 to 3

KEY (1= highest priority, 3= lowest priority)

1. Introducing alternative policy types
2. Compliance issues
3. Collaboration with Service Providers
Global Mobility Challenges
Global mobility challenges are the aspects of mobility that are hindering organizations from reaching their mobility priorities and goals.

The top three challenges faced by Global Mobility today is introducing alternative policy types, compliance issues and collaborating with service providers.

It comes as no surprise that the introduction of alternative policy types and compliance issues are the top two challenges faced by organizations in the Nordics. The ever-changing legislation around cross-border activities, and the increased focus of the authorities on the subject make compliance an issue for all organizations.

Changes in the employee landscape are pushing organizations to introduce alternative policy types, such as business traveller policies and commuter policies. The introduction of these new policies requires a large amount of administrative resources, as well as a good understanding of all the elements and requirements that need to be assessed under different types of policies, ranging from employment law and tax to compensation, benefits and payroll. In fact, when asked whether their mobility program was equipped to adapt to the changing employee landscape (i.e. millennials, freelancers, business travellers, etc.), 74% of participants responded that they are somewhat equipped but there is room for improvement. Another 17% responded that they are not at all equipped, while only 9% feel equipped to face the fast changing employee landscape.

Lastly, collaboration with various service providers can be challenging both for the employee as well as the organization. The use of technology, such as Deloitte’s Mobility Management platform, allows organizations to connect with their service providers through one platform, making the management of different contacts more manageable.

Deloitte Recommendations
Deloitte recommends doing the exercise of identifying the organization’s mobility priorities and challenges. This will allow the organization to identify the key drivers of its mobility program, and to allocate time and resources on areas that are important for the organization.

Mobility has many stakeholders, therefore it is important to do this exercise with key stakeholders that are usually involved in the mobility process, such as HR, Mobility, Tax, Legal, HR and Finance.
Policy Suites/flexibility

Current Policy Suite
When mobility programs are still in early stages, it is more common to only find short- and long-term policies. The more the mobility program evolves, the more policies and flexibility the program tends to have. Participant’s responses confirm that the most common policies include long-term (83%) and short-term policies (80%), with the smallest number of companies reporting having business traveller policies (14%). This indicates that the Nordic market may still be in early stages when it comes to mobility, but we see that there is an increase in the types of assignments and policies.

However, when asked whether organizations expect mobility under these policies to increase, decrease or remain the same, we see significant fluctuations in the use of short-term, international commuter and business traveller policies. 67% of participants expect an increase in short term assignments, 45% expect an increase in business travellers and 42% expect an increase in international commuter assignments. Under 6% of participants expect a decrease in these three types of assignments, while 24% of participants expect long term assignments to decrease.

Short-term and business traveller assignments reduce costs by limiting organization’s exposure to tax liabilities and on-going assignment allowances.

These figures draw attention to the fact that not many companies reported having a business traveller or commuter policy, but it is clearly a focus area for many organizations. These policies are associated with lower-cost approaches to international mobility. Short-term and business traveller assignments reduce costs by limiting organization’s exposure to tax liabilities and on-going assignment allowances. This makes sense, looking at the results relating to cost containment in this survey. Furthermore, the way of mobility is changing, as these results very well show. There is an increased need for mobility, which calls for quicker deployments. Business travellers and commuters may be a way to fill organization’s need for quick mobility.
Segmenting the workforce

Segmentation of the workforce refers to how companies divide their global workforce, and how to differentiate one assignment from another when it comes to choosing the right package for the employee.

A majority of organizations (43%) divide their global workforce based on the duration of an assignment (i.e. short term or long term) to select the applicable policy and salary package. 27% of organizations segment the global workforce based on the type of assignment (e.g. commuter or project worker). Only 13% use the employee grade as a segmentation method, while 18% segment the workforce based on value, that is, the development value that the assignment has for the assignee and the business value it has for the organization.

Deloitte recommendation

Deloitte encourages organizations to consider the value an assignment generates on an organizational level and on an individual level when determining assignment packages and policies, and considering this against mobility drivers and priorities. For instance, if talent development is a high priority for the organization, the organization may choose to provide more support to developmental assignments. Alternatively, if cost reduction is high up on the agenda, the organization may choose to provide fewer benefits for solely developmental assignments which are more valuable on an individual level than an organizational level.
Providing flexibility

Adding new policies and adjusting existing policies to offer both the employee and the business flexibility is a common objective for Mobility managers, as this helps in keeping the program up to date and cost effective.

When asked how the organization provides flexibility, a large majority (62%) confirmed that flexibility is provided through multiple policies, where each policy is differentiated by length or purpose or other prescriptive criteria dictating which policy applies. This is followed, although not closely, by providing flexibility by individual negotiations and exceptions (21%). This is more common in organizations that have a small number of international assignees, but it may lead to increased assignment costs and conflict within the organization due to differences and inconsistencies between assignees.

Deloitte recommendations

The employee experience is closely linked to providing flexibility and the applicable policy suites. Deloitte recommends having a strategy for how flexibility is provided and regulated in the policy. Individual negotiations can sometimes result in low satisfaction and competition amongst employees, and can ultimately be a costly approach for the organization.

Other ways of providing flexibility include providing cash instead of individual benefits to accommodate employee preferences, or providing benefit options when determining the assignment or transfer package.

How would you best describe your organization’s approach to providing flexibility? (multiple responses possible)

There is an increased need for mobility, which calls for quicker deployments. Business travellers and commuters may be a way to fill the organization’s need for quick mobility.
The employee experience and talent management

The employee experience
Talent development is an important motive to send employees out on assignment. Focus on employee experience is therefore crucial.

95% of companies find the employee’s experience of an international assignment important or very important, however only 42% of companies have made any changes to improve the employee experience. That being said, 30% of companies have plans to implement changes to enhance the employee experience.

Deloitte recommendations
There are many ways in which employers can improve the employee experience. Some mobility functions may choose to focus on offering the assignee flexibility when it comes to determining their transfer package. Equally, streamlining operations and making the mobility function more efficient through the implementation of standard processes supported by technology can make the employee’s interaction with Mobility and its vendors smoother. Having a positive experience could also strengthen the employee’s interaction with the organization. This requires coordination between managers and talent strategy to align mobility with career and talent development.

Global Mobility’s role in talent management
Global Mobility can play a key role in talent management. It plays an important role in talent development, engagement and retention. In order to carry out this role, it is important to have the right talent strategy, opportunities and processes to implement the strategy.

A large percentage of participants responded that Global Mobility does not have a large role in talent management (35%), but a promising 41% have plans to increase Mobility’s role in talent management. 24% of companies already have Mobility playing an important role in talent management.

Managing talent through Global Mobility can have many goals. It can be a way to retain and engage existing employees, or even be used as part of a career development plan. For example, some companies may require international experience in order to ascend to a leadership level. 36% of companies are already using mobility as a part of its talent strategy to retain and engage employees, while 42% have plans to include mobility as part of their talent strategy.

36% of companies are already using mobility as a part of its talent strategy to retain and engage employees, while 42% have plans to include mobility as part of their talent strategy.
The age range of most assignees on global international assignments suggests that Nordic companies are still using mobility as a way to fill a critical business need, or for highly skilled positions, with a majority of employees on international assignments falling in the age range of 40-49, at 46%. 37% of employees are between 30-39 years old, which indicates that these kind of moves are more strategic from a company perspective. Employees under the age of 30 are not as common, with only 7% of employees falling in the age group of 20-29. This age group would be the most common group to send on assignment for training and developmental purposes. With the rise of millennials in the workplace, a group who is craving more experience and variety from the, up to now, traditional work path, mobility can be utilised as a significant support in career development.

Gender diversity and career development
The survey results show that international assignments are predominantly taken by male employees. Approximately 70% of respondents answered that between 75% and 100% of employees on assignments are men, meaning that less than 25% of employees on international assignments are women.

These statistics beg the question why more women aren’t going on assignment. There are several potential reasons for this, ranging from the compensations and benefits provided, to the purpose of mobility within the organization (developmental, strategic, etc.). Using mobility for career development and targeting a younger age group between 20-29 of both men and women is an initial step to boost the development of future female leaders and to further encourage taking on assignments in the future. It is important to provide the necessary support to provide equal development opportunities to both the male and female employee population.

Deloitte Recommendations
Deloitte recommends considering mobility as a way to align business and talent strategy. Increasing communication between the Global Mobility Function and HR/Talent Management can enhance talent development opportunities through experiences abroad.

With a global focus on gender diversity and in increasing the quota of women filling leadership roles, Mobility should consider making going on assignment more accessible to women, considering factors such as spouse support while on assignment, educational support for children, etc.

What age range do the majority of assignees on international assignments fall under?

<table>
<thead>
<tr>
<th>Age</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
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</thead>
<tbody>
<tr>
<td>Count</td>
<td>5</td>
<td>10</td>
<td>20</td>
<td>15</td>
</tr>
</tbody>
</table>

0 5 10 15 20 25 30 35 40 45 50

0 5 10 15 20 25 30 35 40 45 50

20-29 30-39 40-49 50-59
Cost Assessments

63% of participants said that cost containment is always an issue for Global Mobility but there is not an increased focus on this at the moment. One way of controlling costs is to estimate the costs of an international assignment, and compare this with actual costs. Companies that compare estimated and actual assignment cost data over time can improve the accuracy of their future estimates. Growing and updating the database of information gathered from assignments allows Mobility to provide the information it needs to advise the business on cross-border moves with the best possible return on investment.

Despite 63% of companies agreeing that cost containment is always a high priority for Mobility, only 14% actually measure the actual cost of an assignment versus the estimated cost. 43% compare the actual and estimated cost on a case by case basis, while 43% do not measure the costs at all.

**Deloitte Recommendations**

Measuring the costs of international assignments allows companies to measure their Return on Investment (ROI). This is data that can be used by the business in its future estimates and planning. It is also an important tool for ensuring that Global Mobility is a valuable and revenue generating asset for the organization.

Deloitte recommends carrying out cost projections before an assignment, following up during an assignment and comparing the actual cost with projections after an assignment. This allows for more reliable data in the future, and a clear picture of the return on investment of an assignment.
Technology

Technology can be leveraged in many ways, from collecting data for cost projections or compliance by managing travel patterns, to streamlining operations to make both the Mobility function and the employee’s interaction with vendors’ smoother (assignment management).

Use of data analytics
Depending on the size of the mobile workforce, leveraging technology and data analytics is one of the largest opportunities for Mobility today because it can help the function communicate the success of its program and track investment in cross-border activity, backed up by hard data.

In Mobility’s aim to be a strategic partner for the business, data can help the Mobility function report on its progress and success, whether this is cost reduction or improving the employee experience. Ultimately, this data can be used to advise the business and organization on best practices.

29% of companies claim to occasionally use analytics to report on the status of their assignment program, while 12% claim to use data regularly for this purpose. This figure is expected to increase, with an additional 27% of participants looking to add analytics to their capabilities. On the other hand, 32% of participants indicate that they are not using nor considering adding data analytics to their capabilities, showing that a technology is not a priority.

Different uses of technology
When asked to rate their use of technology in different areas, most participants rate themselves as weak or not applicable (they do not use or consider using technology in this area). However, 46% of respondents agree that technology will play a very big role in supporting the Mobility function in the next 3 years, followed by 43% who see technology playing a larger role but not a leading role in supporting the Mobility function. Only 11% do not see the need for technology to support the Mobility function.

Needless to say, we can expect to see a surge in the use of technology to support the Mobility function, allowing for increased use of data analytics and metrics to measure mobility success.
Deloitte recommendations

Technology can be a way of providing governance and control over the Mobility function. Deloitte’s Mobility Management Technology can provide organizations with transparency, cost-effective co-ordination, consistency and central reporting throughout an organization’s whole mobility program.

The implementation of technology will also allow a broader overview over travel patterns, help in the identification of compliance issues, and equally important, provide an improved employee experience through streamlined operations.

In simple terms: Keep it simple, make it mobile.

Rate your use of technology in the following areas

<table>
<thead>
<tr>
<th>Area</th>
<th>N/A</th>
<th>Weak</th>
<th>Strong</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using external data for talent resourcing and recruiting</td>
<td>47%</td>
<td>25%</td>
<td>22%</td>
<td>6%</td>
</tr>
<tr>
<td>Using people data to predict workforce performance and improvement</td>
<td>32%</td>
<td>36%</td>
<td>32%</td>
<td>0%</td>
</tr>
<tr>
<td>Using technology to monitor travelling within your organization and to remain compliant</td>
<td>21%</td>
<td>53%</td>
<td>23%</td>
<td>3%</td>
</tr>
<tr>
<td>Use of technology for assignment management</td>
<td>22%</td>
<td>42%</td>
<td>26%</td>
<td>10%</td>
</tr>
</tbody>
</table>
For more information or questions regarding the survey do not hesitate to contact us.

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