



The Evolving Global Mobility Landscape

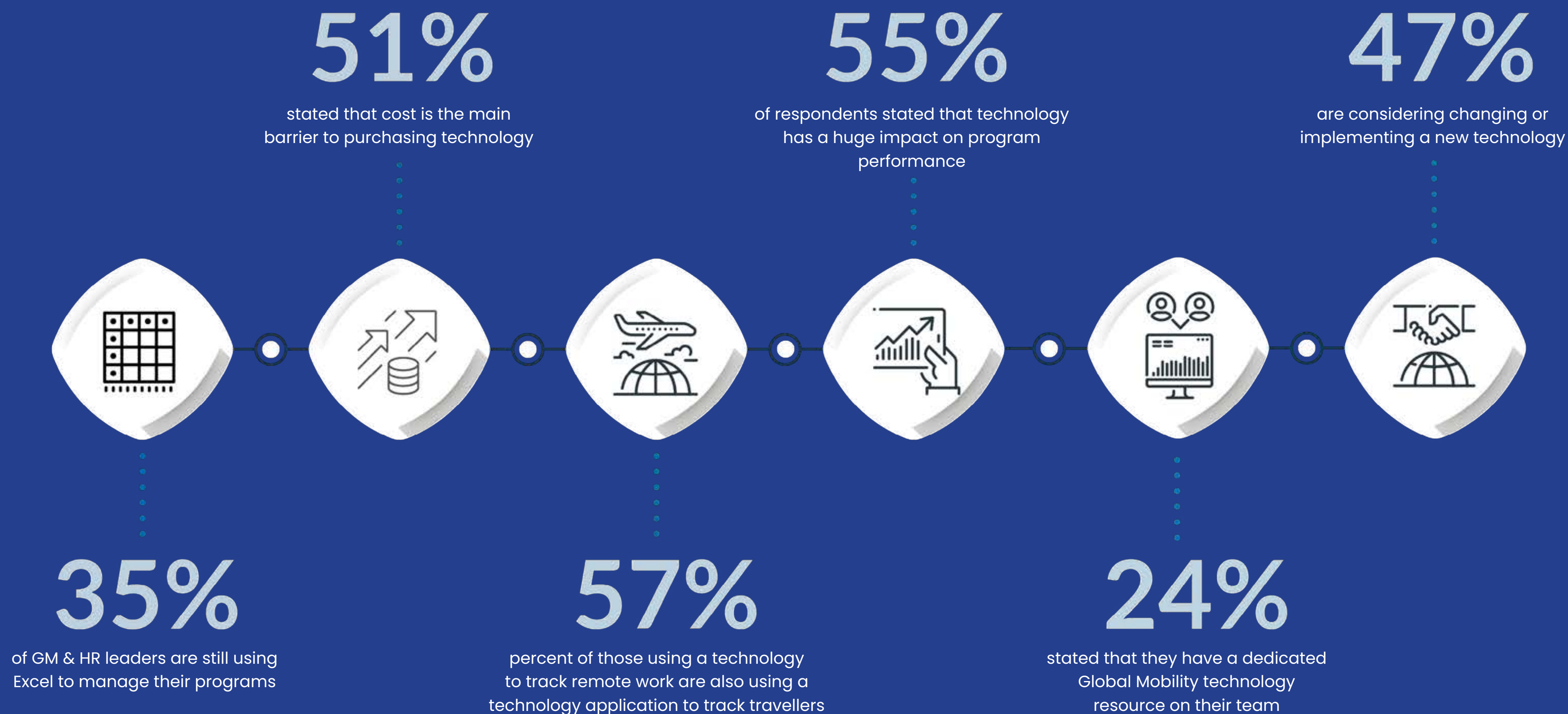
2022 Report

In partnership with



GME Report 2022

The Evolving Mobility Technology Landscape



Introduction

As we emerge from Covid organisations face significant change and challenges and these have a particular impact on the Global Mobility function and its role.

During the pandemic Global Mobility enjoyed increased visibility with leadership which provided the opportunity to engage more widely across their organisation and gain that all important “seat at the table”. As a result, the role of Global Mobility has shifted from being an operational function to playing a more strategic consultative role in organisations.

Few could have predicted how the world of work would change post Covid. The pandemic created a seismic shift in the way in which companies and employees operate. Leadership now sees the value of Global Mobility in managing internationally mobile employees and expects them to create flexible policies to attract and retain talent whilst ensuring cost effective program management and risk mitigation.

While many organisations are thriving post pandemic and are focused on growth and expansion, they face significant barriers from the constantly changing geo-political landscape, increased compliance and global labour and skills shortages. As a result,

the remit of the Global Mobility function has expanded to cover, amongst other things, new and hybrid ways of working, talent mobility, ESG and Diversity and Inclusion. These changes have added significant workload to Global Mobility Teams and the function is having to rapidly evolve and proactively work to find solutions to talent shortages and respond to business demands.

Remote working and virtual assignments have not replaced more traditional international assignment types but are adding an additional layer of complexity and pressure on Global Mobility teams to provide more flexible and cost-effective solutions. With all this change the need for digital innovation to improve the performance of Global Mobility has never been greater.

GM is playing a more critical role in organisations in the deployment of all types of mobile employee. International mobility is no longer seen as an opportunity for the chosen few but potentially for the entire workforce.

Survey Introduction

In 2020 we conducted the first survey on technology in Global Mobility, The Future of Global Mobility – The Digital Journey and ran a follow-on survey during 2022, to understand the extent to which the Pandemic has influenced digital transformation in the intervening period.

The survey results indicate that global mobility still lags behind other areas of HR in leveraging technology. Not surprisingly, organisations with large mobile populations are more likely to have embraced technology and implemented a technology solution to manage their program, whereas many smaller organisations are yet to introduce a tool or even consider one due to cost.

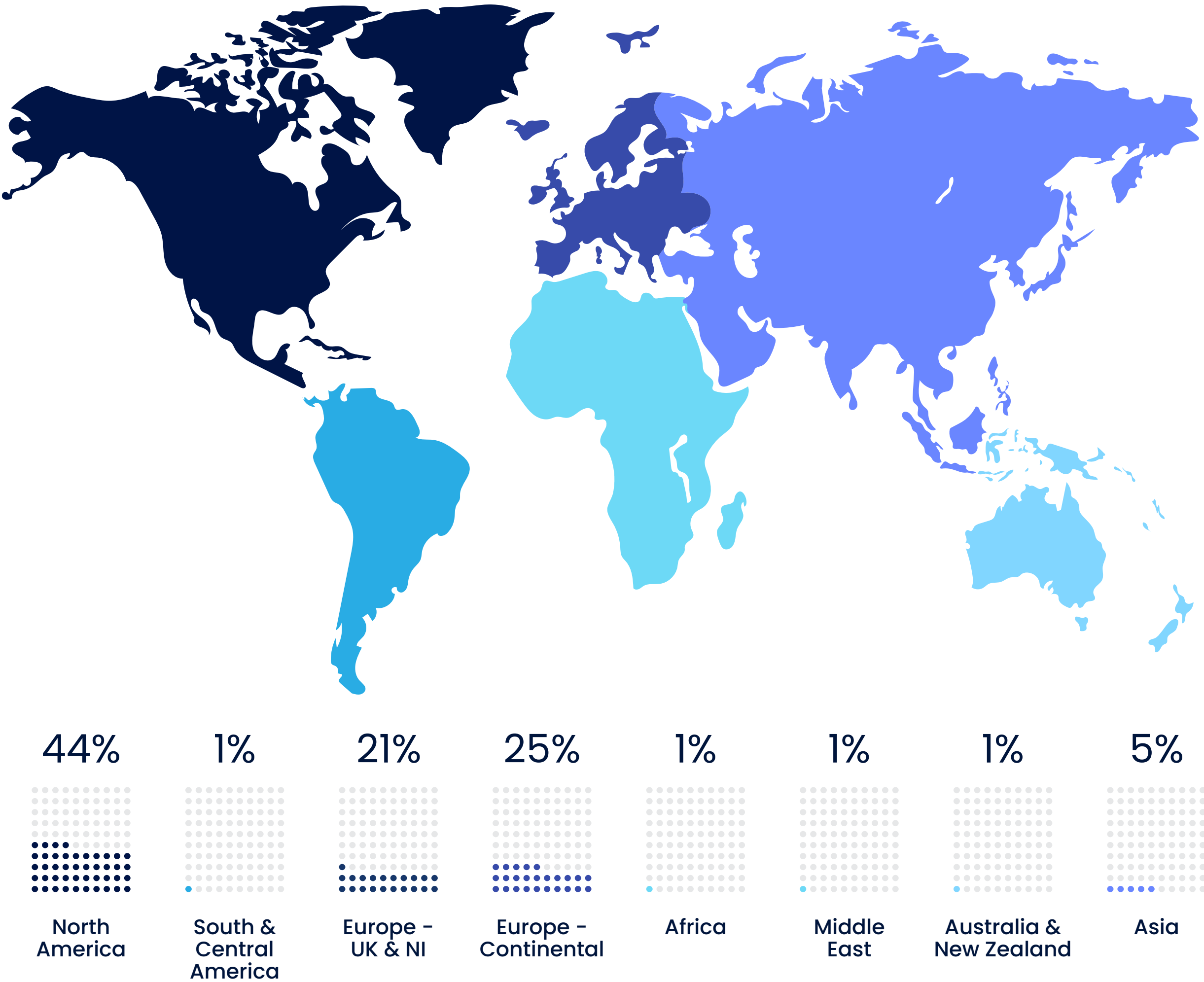
In this report we will provide an update on the use of technology in Global Mobility programs and compare and contrast the results with the 2020 survey.

We would like to thank everyone who took part in the survey as well as Equus Software for their support and contribution to the survey and this report.

Survey Demographics

The survey responses indicated an almost even split between participants in Europe, 46% and North America, 44%. The remainder of respondents were based in Asia (5%), the Middle East (1%) and Latin America (1%).

When comparing the 2022 data to the previous survey there was higher representation from European based companies and slightly fewer responses from North America. As with the previous survey there was a low response from Asia, which is not surprising, due to the smaller number of headquartered companies with global operations in the region and the lack of maturity of their programs.

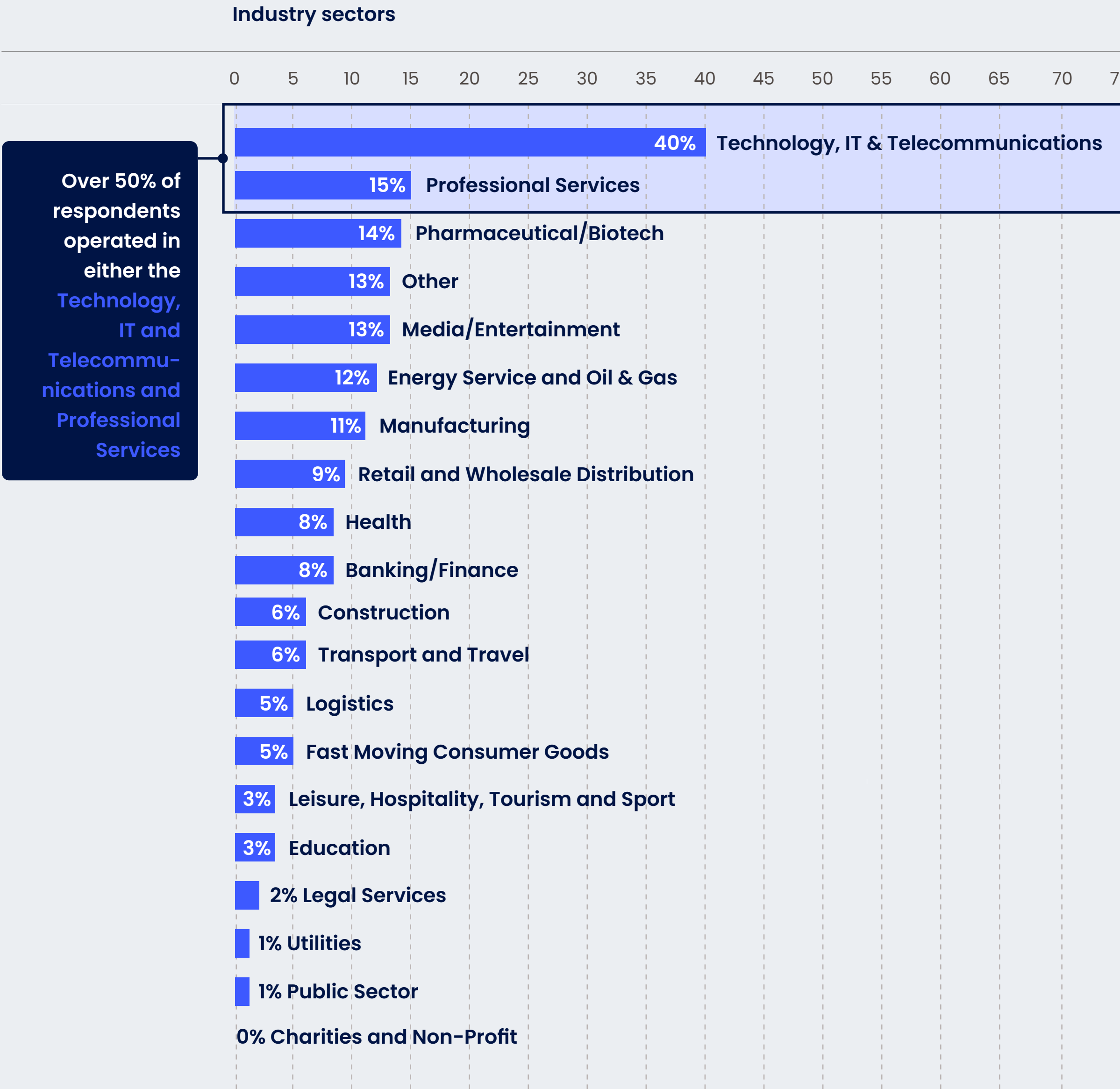


Participants represented a wide range of industry sectors but the majority, by far, came from the Tech Sector (40%). This is not unexpected with the increase in digitalisation and significant growth in this sector during the pandemic.

Fifty seven percent of respondents had an employee population of 20,000 and over with the balance under 20,000.

What was interesting to note in the 2022 survey is that most respondents hold a senior position within their organisation which could indicate an increasing interest and awareness of the benefits of digitalisation in delivering better value from the Global Mobility program, improved communication, data flows and employee experience.

Ninety-five companies responded to the 2022 survey, with representation across all industry sectors and from programs of all sizes. Interestingly, the average Global Mobility Team comprises less than 5 people which highlights the fact that small teams are managing a large workload and the need for technology solutions has never been greater.



Note: Some respondents were able to select multiple choice answers

Shifts in Move Types

In recent years we have seen greater diversity in the categories of assignments being used by organisations. The 2022 survey indicates that while international assignments remain the most popular type of move the number of permanent transfers is steadily increasing, particularly in the Tech sector and in organisations with smaller assignee populations.

Perhaps, not surprising, in the post pandemic era, when companies are ramping up mobility to drive organisational growth, participants reported an increase in the number of business travellers particularly in companies with larger assignee populations. Short-term business trips and virtual assignments are being used as a way to kick start mobility in many organisations.

What is interesting to note, is that over 50% of participants reported they have business travellers but nearly a quarter of them stated that Global Mobility was neither responsible for this category of mobile employees nor had any knowledge of the number of business trips in their organisation.

With the increase in demand for hybrid working almost half the of the participants reported they have employees engaged in remote/virtual assignments. Attracting and retaining talent is a critical priority for most organisations and Global Mobility must create innovative and flexible policy options which support their organisations talent strategy as mobility is now regarded as key to growth. GM teams are now getting involved at the selection stage and throughout the recruitment process rather than just managing the employee relocation aspects. This reinforces the broader role the function is playing in global workforce deployment.

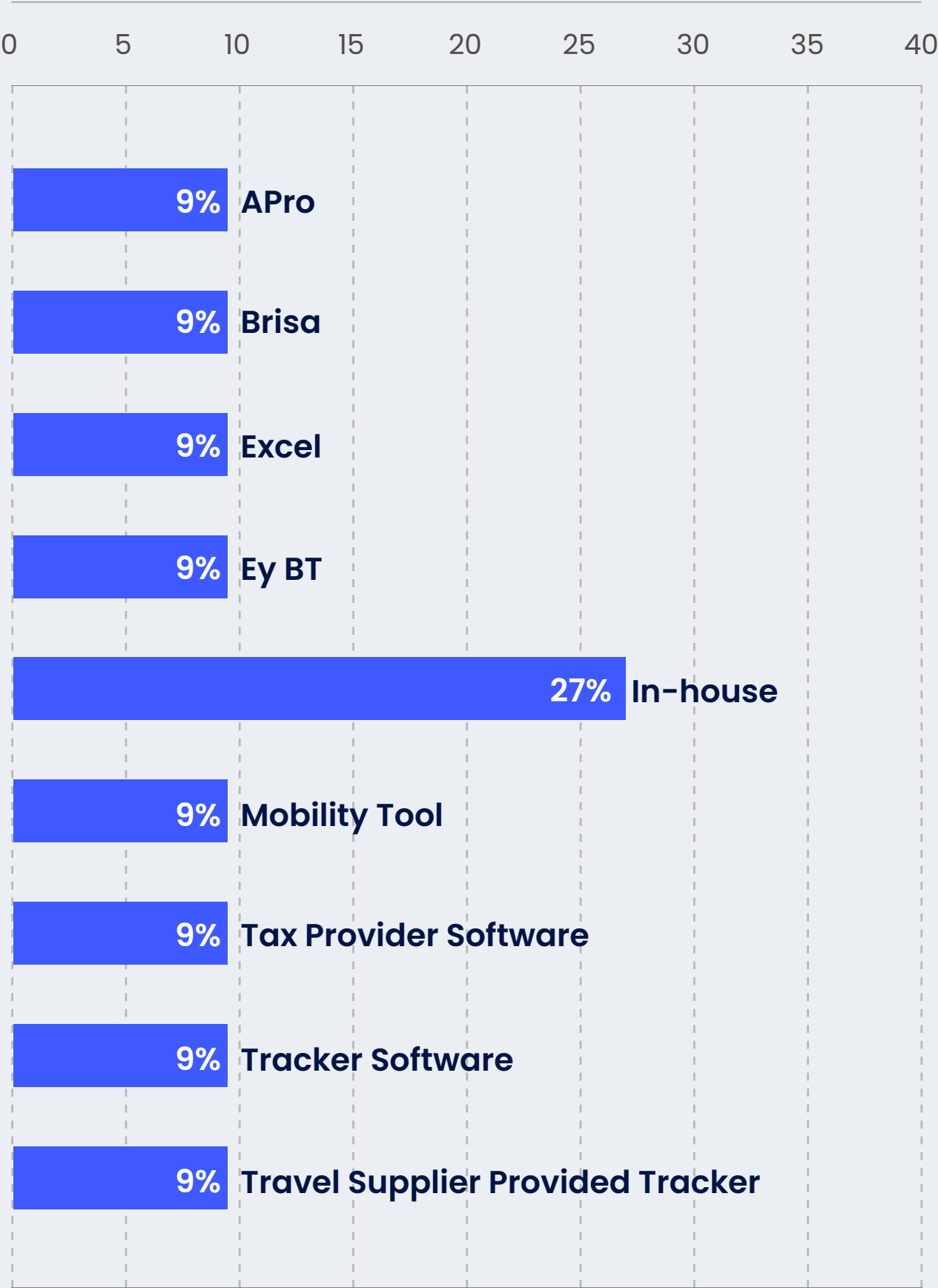


Tracking Remote Work and Business Travellers

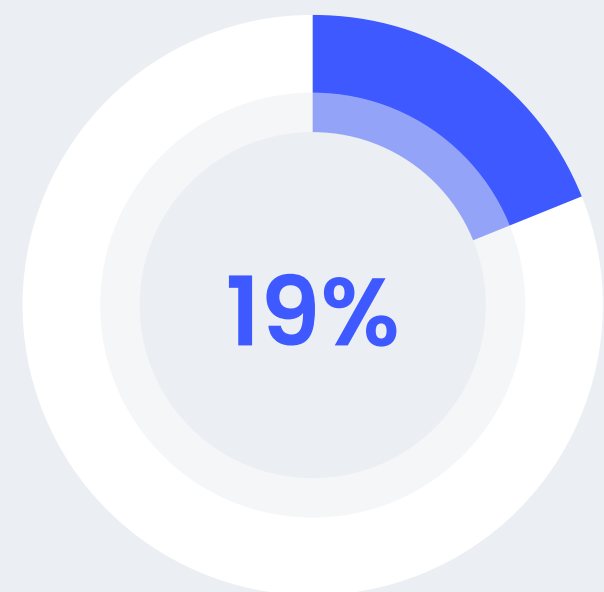
Many companies faced significant challenges during Covid in establishing the whereabouts of their mobile employees. Post pandemic there has been a renewed focus on tracking business travellers and remote workers to minimise tax and immigration compliance risks.

We asked participants if they were using a technology solution to track their business travellers and nearly 60% stated that they were and are utilising a variety of software tools. Interestingly, the use of custom designed in-house systems is becoming more popular, and adoption has slightly increased since the 2020 survey.

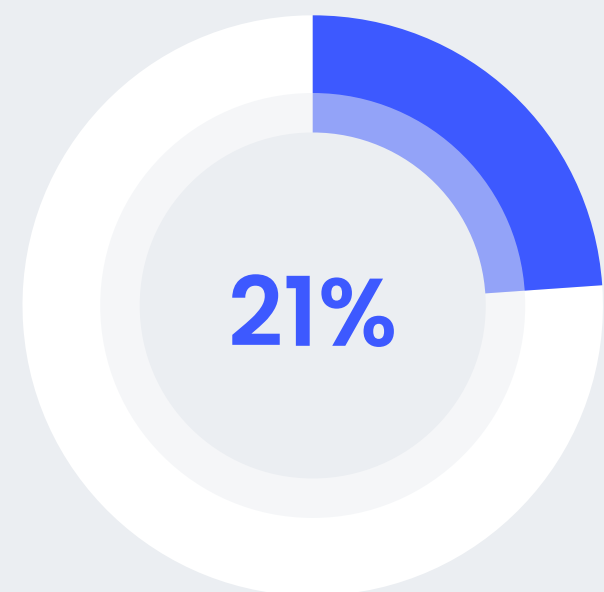
Those who are using an application to track business travellers, which one?



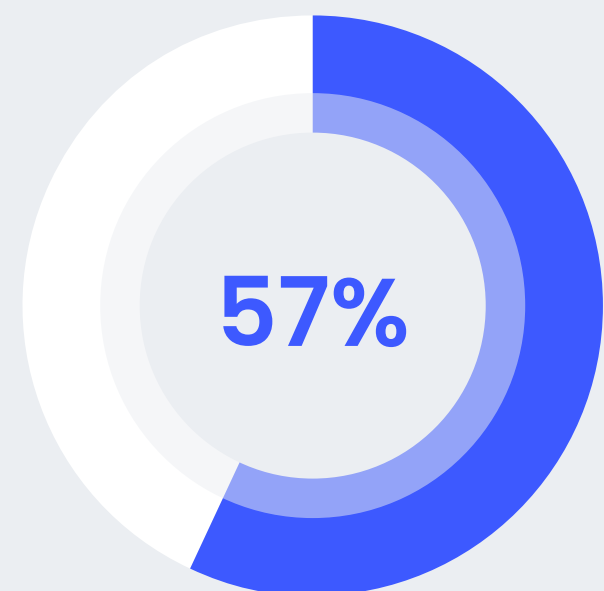
Those who are using technology to track remote work, are they using a technology application to track business travellers?



Considering



No



Yes

In some organisations Global Mobility are not responsible for business travellers and this may account for the fact that nearly a quarter of organisations are not using technology to track business travellers. However, they could be using a travel company’s tracking tool or relocation providers data.

With increased immigration and tax compliance and particularly Posted Workers in Europe companies will need to more accurately track their business travellers and consider implementing one of the specialist solutions available in the market or consider an in-house system.

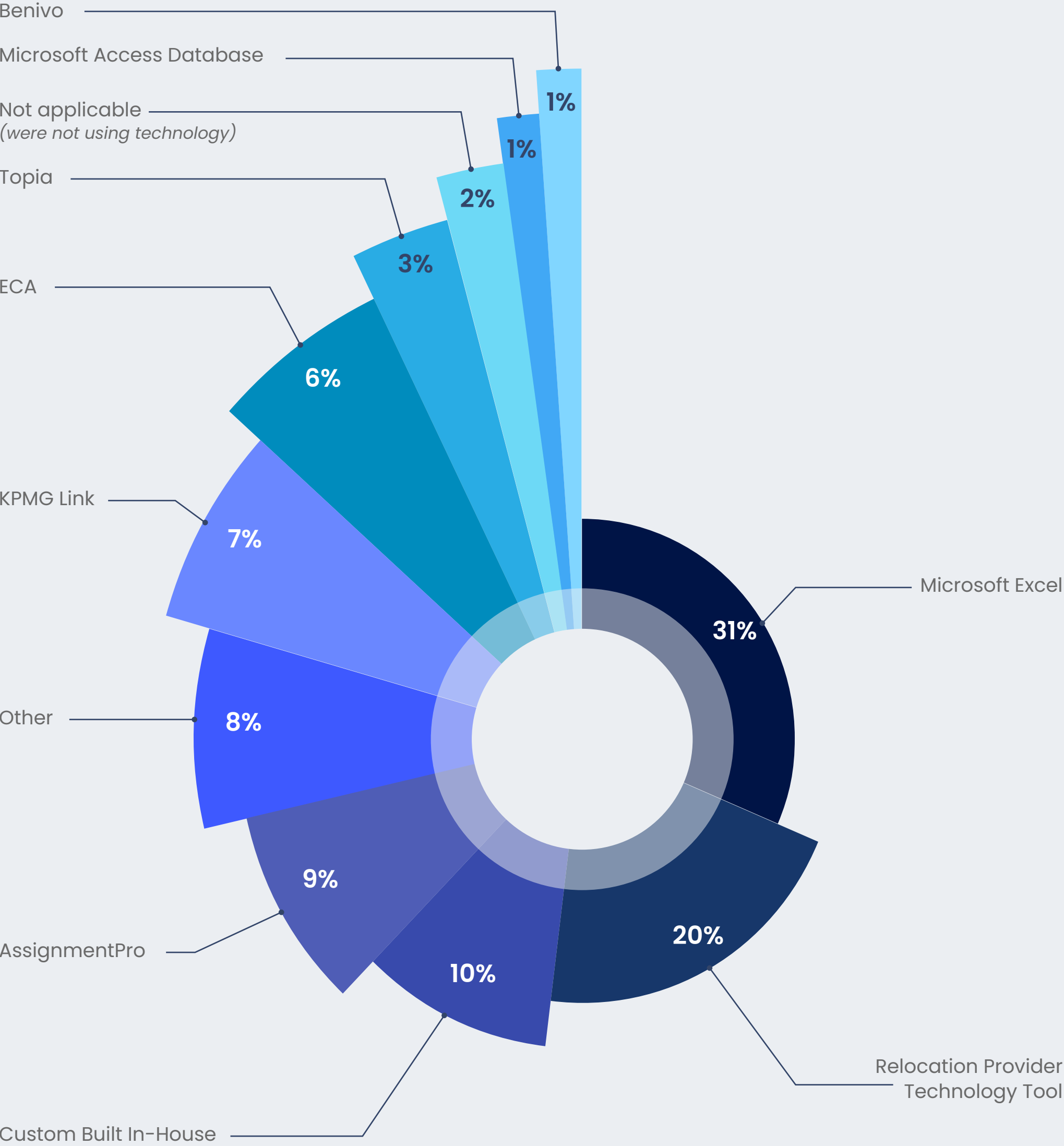


Primary Technologies Used

As with the previous survey the uptake of Global Mobility technology in organisations has been relatively low. The use of Excel remains the primary tool used to manage global mobility programs, which is similar to 2020.

There are a wide variety of platforms available in the market and results show that other than spreadsheets, utilising a relocation company's software is popular, (23%), along with custom built platforms, (10%), and GM Technology providers tools, (30%).

Primary Technologies Used

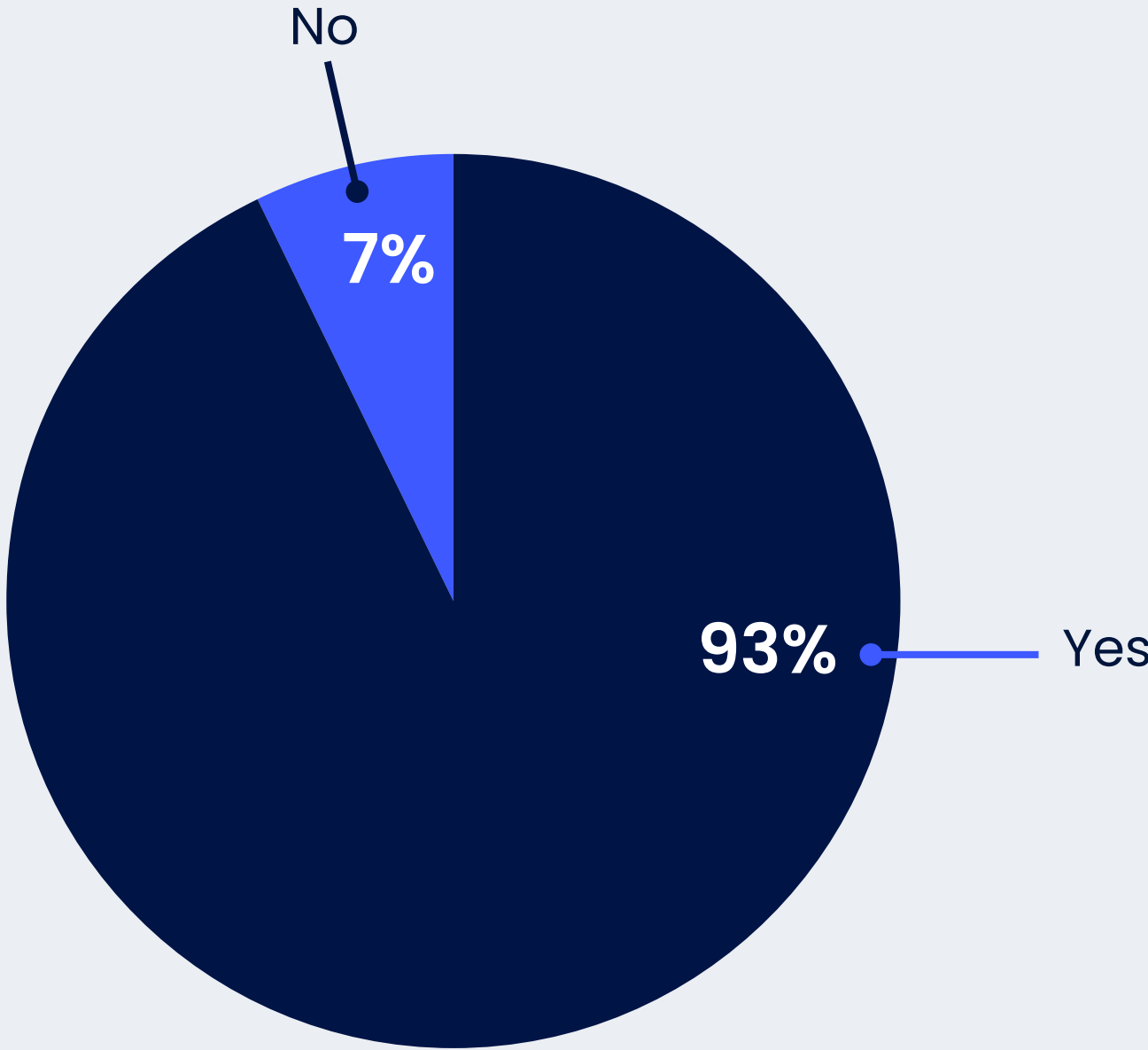
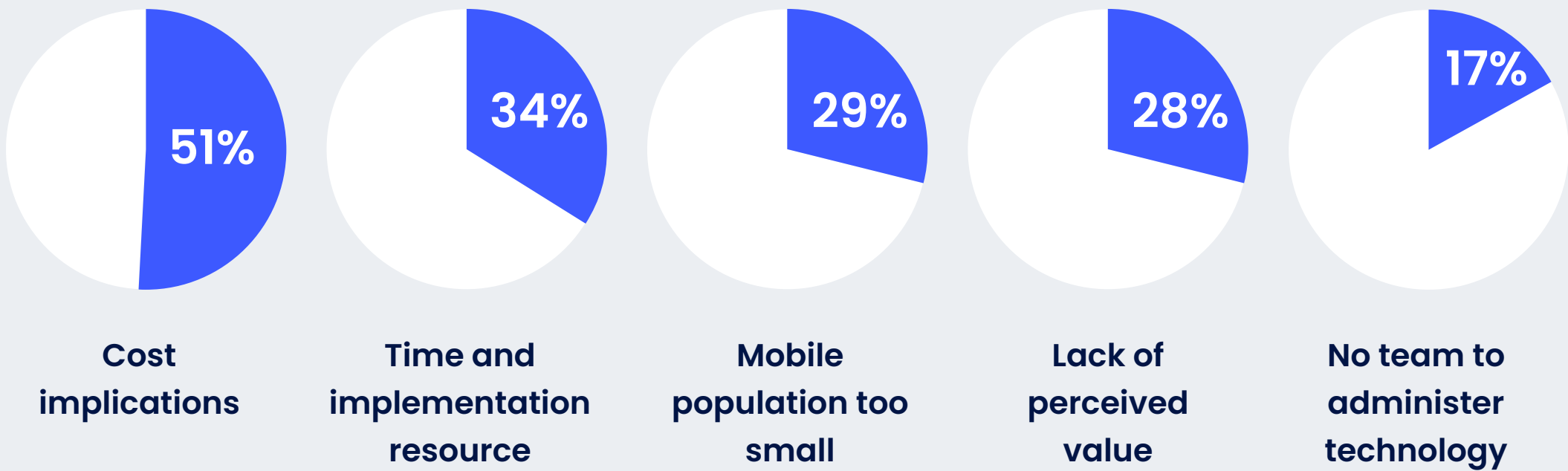


Barriers To Uptake

When asked about the biggest barriers to investing in technology, just over half of respondents, (51%), stated that cost was the main barrier to implementing a tool.

This was more prevalent in companies, with a smaller assignee population (29%) as it is assumed they may not be able to justify the investment. With an ever-increasing workload in Global Mobility teams are very stretched and (34%) were concerned about the time and resources required to implement a solution.

Knowledge of options in the market?

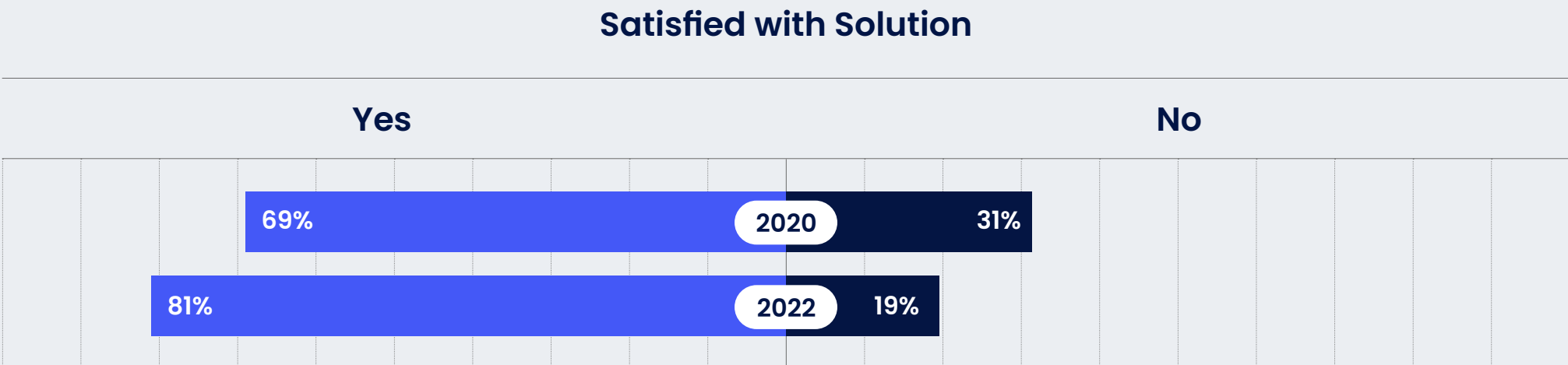
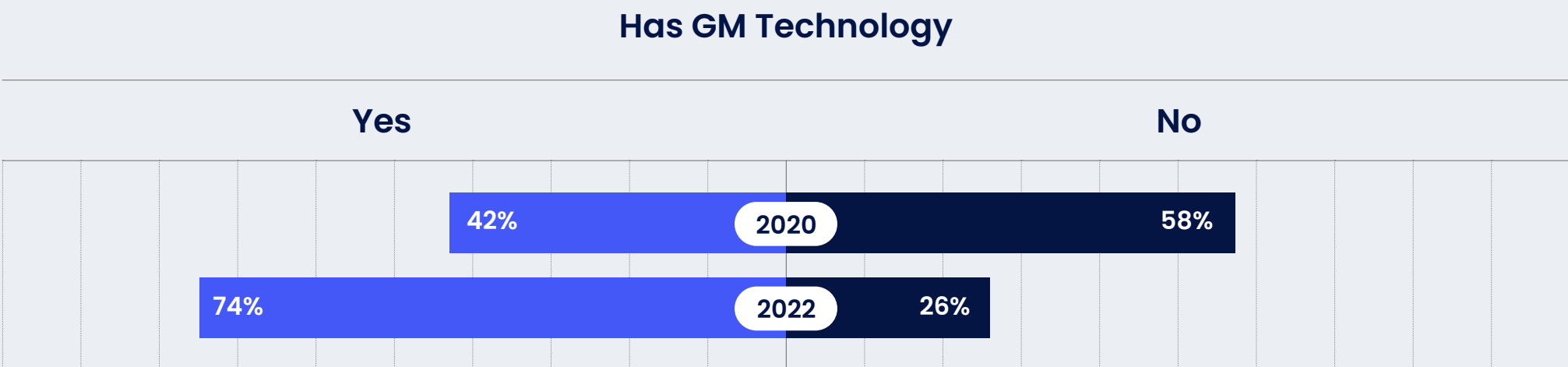


Use of Technology and Satisfaction Levels

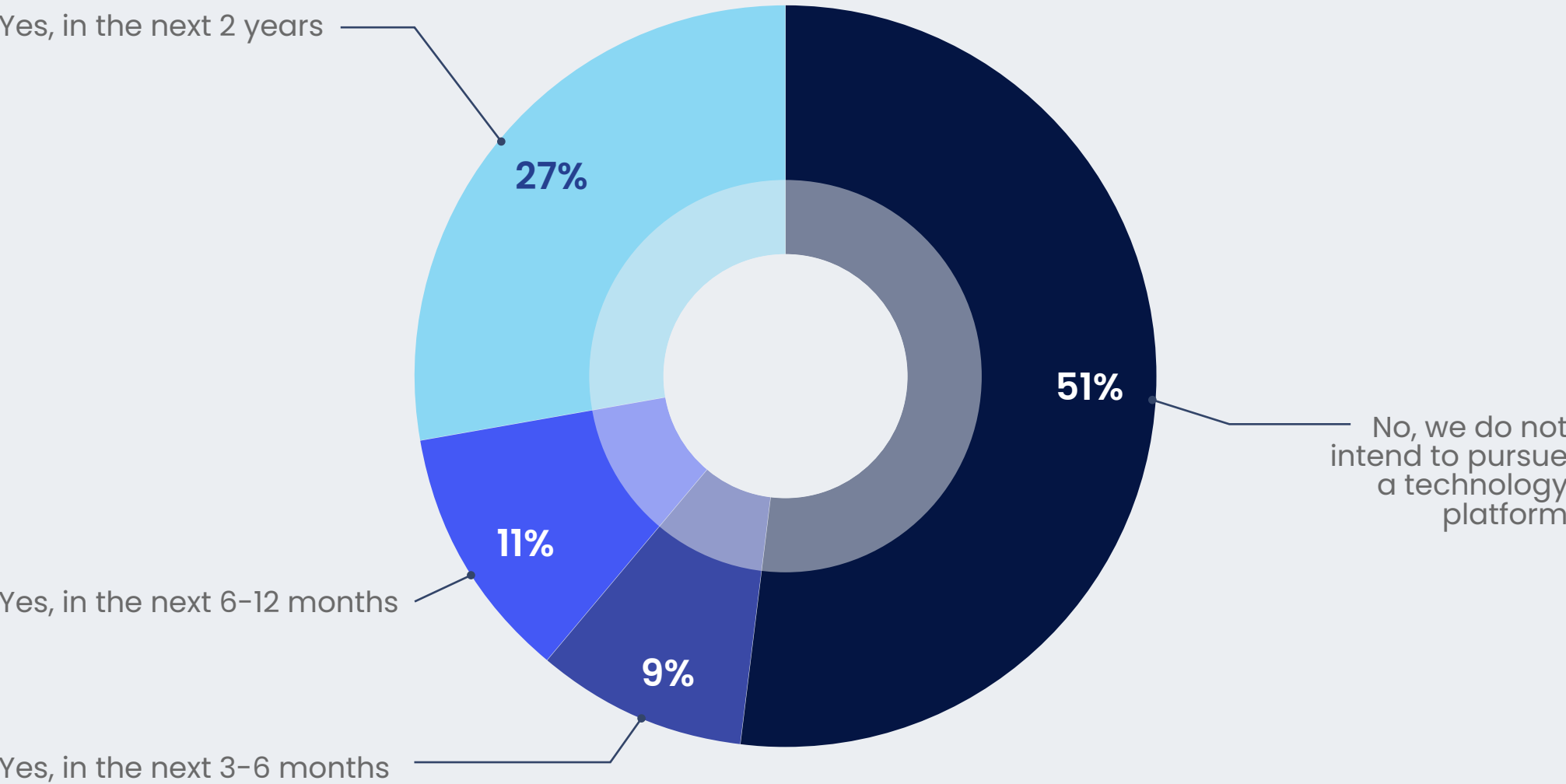
Participants were asked whether they had a technology solution and whether they were satisfied with the tool. What is encouraging is that the number of companies with GM technology increased significantly from 42% in 2020 to 74% in 2022.

The vast majority, 81%, stated they were satisfied with the tool they have in place, an increase of 12% over the 2020 results.

When asked about switching technology or purchasing a solution for the first time, 49% of respondents, stated they intended to switch to a new technology platform or implement one.



Do you intend to switch to a new Global Mobility technology platform or implement a solution for the first time?



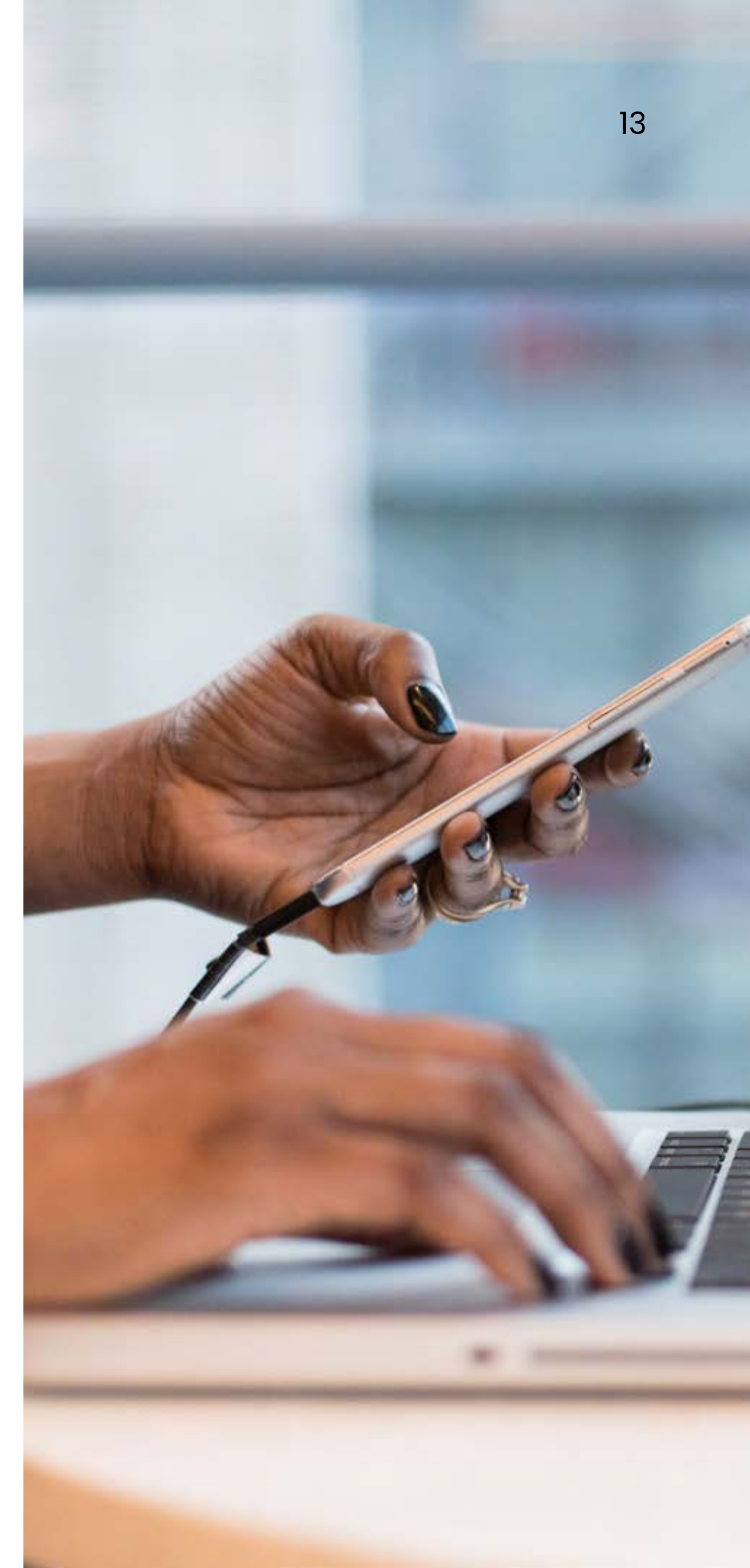
Uptake of Technology Tools

Global Mobility continues to straggle behind HR and other functions in leveraging technology and this is shown in both the 2020 and 2022 surveys with half of respondents stating that they have no intention of purchasing an assignment management platform.

The lack of uptake may be explained by budget constraints resulting from the global economic downturn and companies taking steps to reduce the overall cost of their programs. Global Mobility has also been busy getting back to “business as usual”, introducing new policies to cover hybrid working, managing complex compliance issues and responding to internal talent shortages. This additional workload has meant that many teams are stretched and do not have the capacity to conduct an RFP or implement a new technology solution.

There also appeared to be some reluctance to invest in technology with 43% of respondents stating this was the case in their organisation. This could be explained by the fact that the mobile population in most organisations represents only a small percentage of the total number of employees and it is not always seen as a priority for investment.

However, leveraging data into meaningful analytics is becoming more important to improve business outcomes and engagement with leadership and key stakeholders. Technology can be harnessed at every stage of the mobility lifecycle to drive enhancements that will lead to improved tracking of mobile employees, cost reduction, managing policy exceptions and



streamlining the GM program. Transactional tasks performed by the GM team can be automated and managed through technology and AI, providing a more efficient service to the business and a better employee experience.

With global talent shortages there are gains to be made in improving the employee experience via technology. The relocation experience can be managed more effectively, and a wealth of information can be provided about the host country and local living conditions.

It's important for Global Mobility leaders to consider the enhancements that can be made to their program through technology and make the business case to leadership to support the cost. Introducing technology will bring cost savings and these need to be highlighted as part of the business case.

A technology platform can be linked to the HR system e.g., Workday, Oracle etc., plus service providers technology enabling Global Mobility to capture all the different tools they use and deliver strategic insights and reporting. Creating a technology Ecosystem is becoming a must for GM Teams.

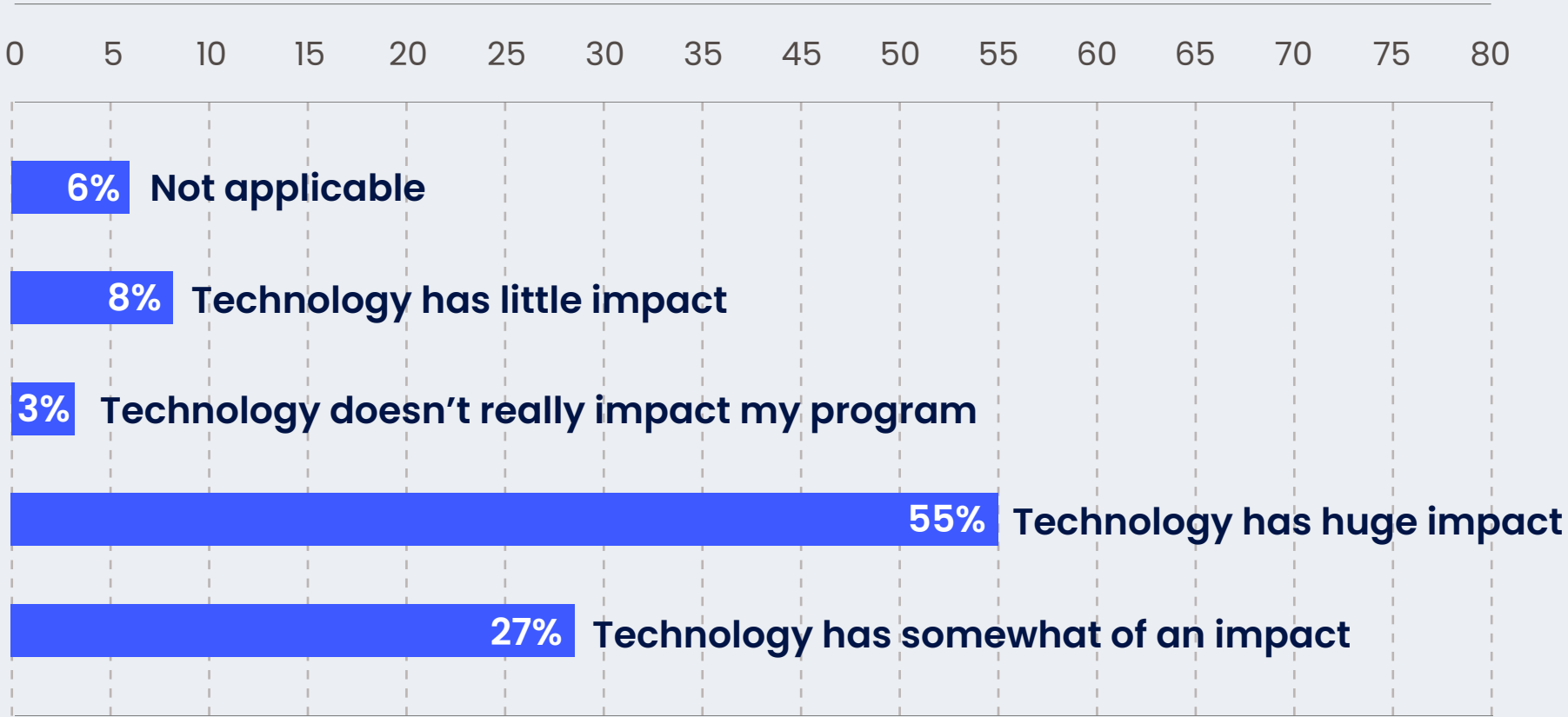
It will save time in managing the day-to-day work and allow our teams to focus on strategy that we can formulate based on insights offered by the data that is tracked and managed within the GM technology tool.

Important Features of Technology

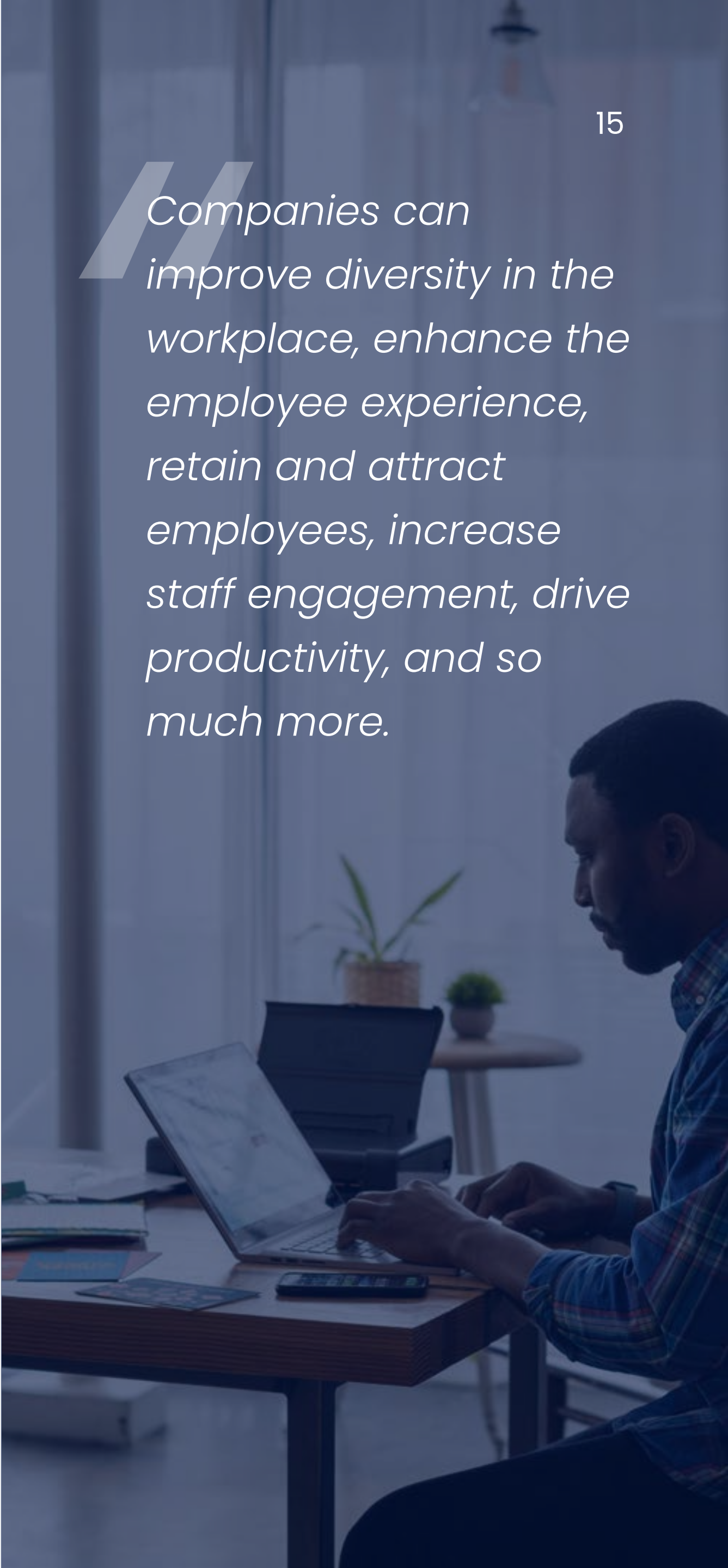
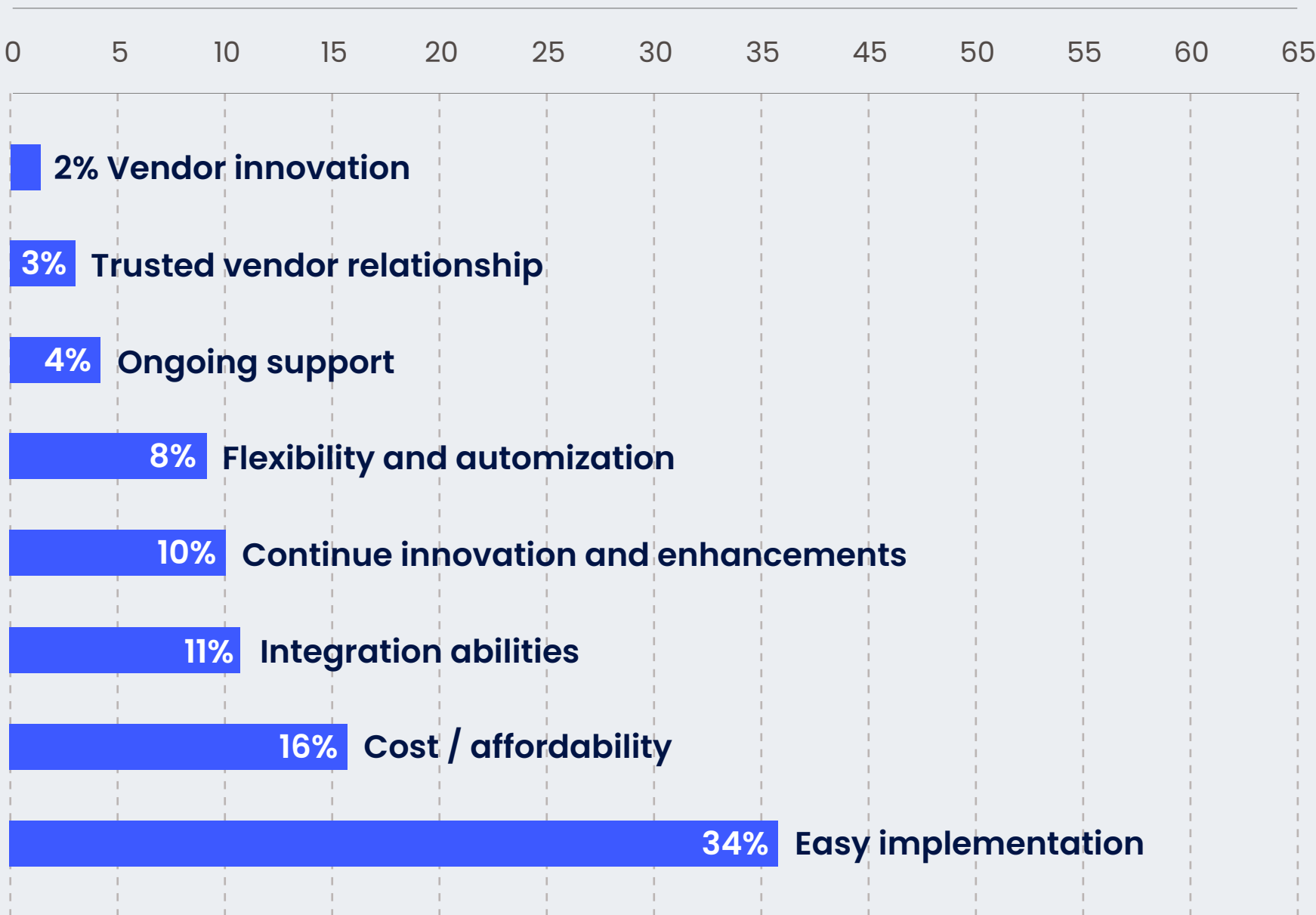
When asked how much technology impacts their program over 50 % of participants stated it has a huge impact on their programs’ performance and effectiveness.

When asked what they considered as the most important features of a technology tool over one third of participants (34%), stated ease of implementation followed by cost and affordability, (16%) and ease of integration. Flexibility was also seen a key feature.

How much do you think technology impacts your overall program’s performance and effectiveness?



Most important features of tech



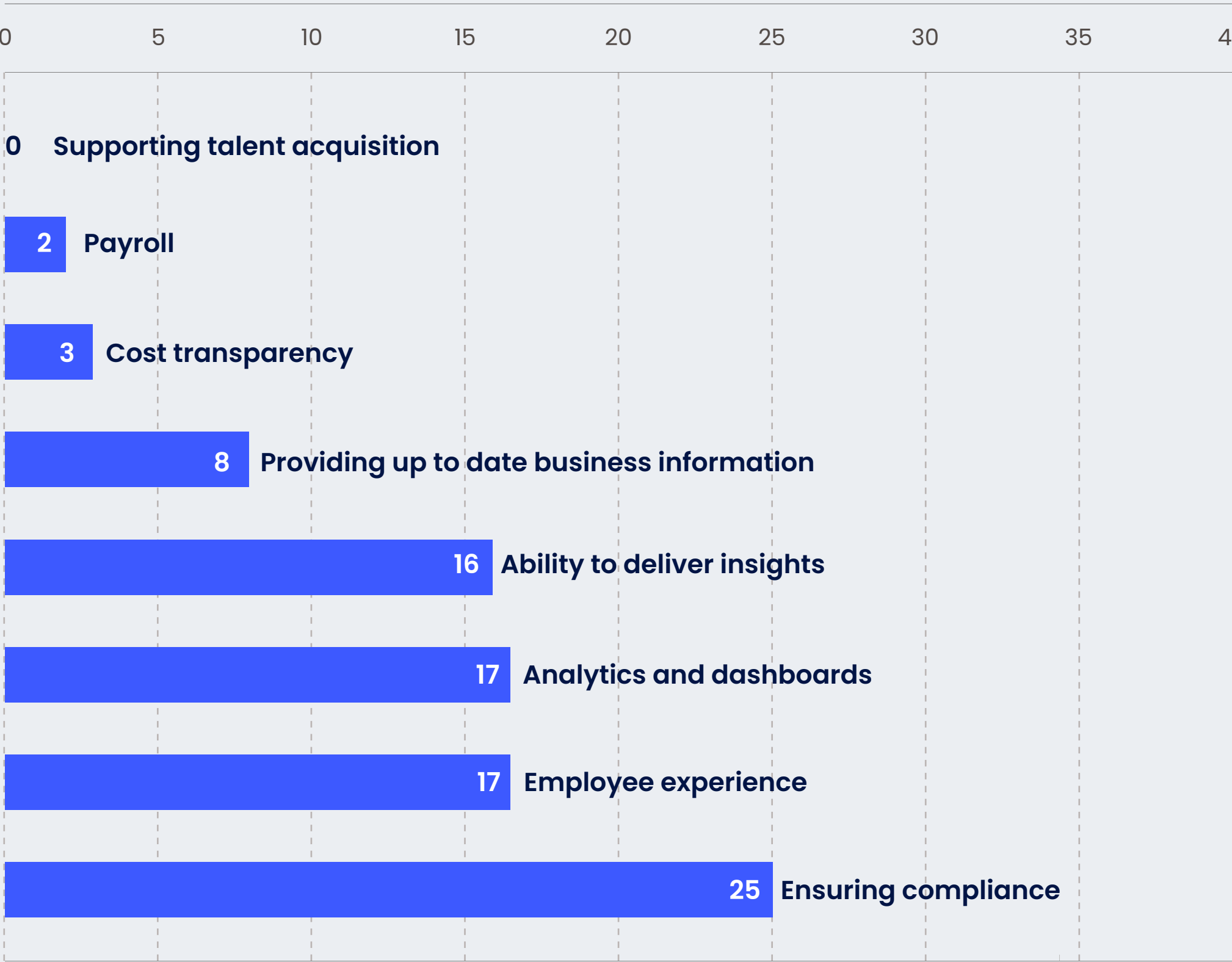
Companies can improve diversity in the workplace, enhance the employee experience, retain and attract employees, increase staff engagement, drive productivity, and so much more.

What is Valued Most in Tech

We asked companies what they most valued in technology and not surprisingly compliance was seen as key for over 25% of respondents.

With the growth in hybrid working and governments tightening up regulations for immigration and tax, companies need a better overview of their mobile employees to avoid potential fines and reputational damage. Employee experience, delivering analytics and insights were also rated as important features of a technology platform.

Most Valuable Impact of Tech



Equus Software Parting Thoughts and Insights

The rise in political, socio, and economical forces are pushing business leaders to work smarter, faster, and more efficiently. This, combined with the growing popularity of remote working and new types of employee moves, means mobility teams are being asked to do more than ever before—and to do so with a lower budget or headcount, or sometimes both.

The new dynamic global workforce has elevated mobility's role to that of a strategic partner with the business. To fulfil these new expectations, mobility teams need access to real-time data to effectively analyse their program and provide meaningful insights that support the wider business. Teams also need to be able to manage compliance risks through effective program governance and risk identification – all while ensuring the employee experience is at the heart of service delivery.

Digital transformation is key to helping organizations be agile and adapt to changing priorities. In order to

remain competitive, Global Mobility leaders are relying on technology to improve their efficiency, spot trends that impact strategic decisions. An integrated technology solution is the thread that weaves together a flexible, agile talent mobility ecosystem.

Siloed operational models are becoming obsolete and cumbersome. Global Mobility is adopting a changed mindset. That is, evolving as an interdependent ecosystem that leverages an automated process, helps drive down costs and duplication, and enables time-saving efficiencies to allow for solutions-creation and innovation.

This research shows that the time is now to adopt technologies and to move forward together on the digital journey.

5 key drivers

are enhancing the talent mobility ecosystem:

- 1 Empower the employee experience:**
a digitized operational model fosters collaboration that frees up resources to innovate and implement customized value to end-users
- 2 Enrich the talent pipeline:**
real-time data enhances talent development and talent acquisition in a competitive environment and predicts future needs, analyzes capabilities, and supports decision-making
- 3 Catalyze performance improvement:**
employ one tool with purpose to manage and simplify everything – from mundane yet must-do tasks to predictive data analytics, tracking, and identification of trends
- 4 Connect the global mobility ecosystem:**
technology is the thread that weaves together the global mobility ecosystem
- 5 Simplify tasks:**
integrate a technology platform to drive efficiencies, standardization, automates effectiveness, and improves compliance



Global Mobility Executive Team would like to extend our thanks to all those who responded to the survey enabling us to produce this report.

We would also like to extend a special thanks to our key contributors:

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