

The RES Forum Annual Report 2018

Global Mobility of the Future: Smart, Agile, Flawless and Efficient

Authored by Professor Michael F. Dickmann,
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Picture theme: Transportation

The images included in this year's RES Forum Annual Report take us on a shared journey around the globe. We hope you have an enjoyable trip!





Report introduction by **Andrea Piacentini**
Co-founder, The RES Forum

Introduction

I am delighted to be writing the introduction to the RES Forum Annual Report 2018, the fifth authored by Professor Michael F. Dickmann of Cranfield University.

This report continues to represent a truly unique piece of work in the Global Mobility (GM) space, since the RES Forum's agenda is created purely by focusing on the practices and interests of in-house Global Mobility HR practitioners. This is important because it means we at The RES Forum can push the HR mobility agenda every year with new ideas, new paradigms and new information which:

- ▶ helps HR Mobility practitioners do their jobs more effectively
- ▶ enables HR Mobility leaders to think differently around how they position their functions internally
- ▶ allows interested parties in the HR Mobility supply chain to understand their potential clients more effectively whilst also refining their own craft

Our report is not a covert marketing tool to sell you services, nor does it represent 'thought leadership' created by a consultant with only half of the answer so that you have to pay for the other half. We believe this to be a very important point of difference.

So what are the key talking points of this year's report? What have we learned and what can you learn from reading the report? I won't rehash Professor Dickmann's summary – that would be disingenuous. What I will share are my own views on the main themes identified by Professor Dickmann which resonate with me, namely, optimized programme management and employee experience.

As an observer, flawless delivery has always been the minimum expectation in HR (and therefore mobility) programme management, a 'zero-defects' model. A feature of this is that companies swing from insource to outsource HR models with some hybrid approaches often being a feature. A personal observation is that nobody, be it users of the HR service or HR themselves, seems truly happy that either model works, which in many ways perpetuates the in/out cycle.

2017 into 2018 has, in my opinion, seen the start of a paradigm shift in optimizing the effectiveness of programmes. I have observed the more consultative and forward thinking vendors and 3rd party suppliers 'up-hire' with the best mobility talent. This appears to be disrupting things in an interesting way:

1. The concept of one team formed of in-house and outsourced vendors is stronger than ever. This is great to see, but poses a real risk to those providers who don't understand this change and who may end up locked out forever.
2. Internal programme value, and articulating this value, is being driven up internally by the more capable and strategic external partners. Where in-house teams might have failed in the past in terms of articulating the mobility value proposition, the more progressive and strategic 3rd party partners have the insight to not just deliver excellent services but also deliver smart solutions through superior tools, data management and programme analytics. This is truly an exciting development.

The second theme I would like to consider is that of employee experience through the GM lens. Employee experience is the key HR idea of 2017 and 2018 – What does it feel like to interact with the company? How do I emotionally connect with the company? What things does the company do for me which in turn motivate me to do things for the company, driving up my engagement, commitment and productivity within the organization? This drive towards employee experience is born out of the very real experiences people have as customers with companies like Amazon or Google where the customer is truly at the centre of everything in all instances. Amazon states that, 'if our customers need to call customer services, we have failed'. What if colleagues saw their HR departments in the same way? And what could this mean for GM programmes? In too many instances, I hear companies talking about compliance, consistency and cost containment as the main reasons why a rigid assignment policy and framework is necessary. What if we saw Global Mobility as something people do to themselves rather than something done to them? Suddenly, how we structure packages could become quite different. What if an employee who self-elects to be internationally mobile requires some small package tweaks unique to their package to support their career aspirations but without a need for 'mothership' to provide bells and whistles? I am thinking of the post Brexit UK employee who commutes to the Netherlands for 3 days a week. This is not impossible to manage, but some small support could go a long way in enabling this individual's career aspirations. Scenarios like this could be relatively low cost but are aligned more closely with employee needs and with the way in which employees engage with the company, potentially improving employee engagement... just imagine if we thought about Global Mobility in such a way?

Moving briefly beyond the 2018 annual report, in 2018 the broader RES Forum Research agenda continues to grow. The annual report which is our overarching view on the state of the [Global Mobility] nation now has some company, with our quarterly thought leading research programme with Leuphana University and Professor Benjamin Bader which covers key and critical themes within Global Mobility. Our themes for 2018 include: Technology & Datafication, Gender Discrimination, AI & HR. Look out for these exciting pieces of research.

And finally a few words about RES Forum's successes during 2017 and into 2018. We are now at the heady heights of 1,600+, members covering a wide global audience. This means the data we have and the spread of views is both more diverse but also more reflective of the Global Mobility industry, in traditional, mature and emerging markets. 2018 has also seen the launch of the RES Forum 'Learning Lab'. Our online curriculum supporting learning for professional level mobility practitioners in both in-house and vendor roles, culminating in the coveted RES Forum Accreditation. Email office@theresforum.com for more information on the Learning Lab.

All of the above would not be possible with the continued support of our members, our academics with whom we partner and our Technical Partners. And for that from all of the RES Forum team we say a huge THANKYOU!

Andrea Piacentini

Co-founder, The RES Forum



Executive Summary by Report Author **Professor Michael F. Dickmann**
*Professor of International HRM, Cranfield University,
School of Management, United Kingdom*

Executive Summary

Smart, Agile, Flawless and Efficient Global Mobility Work

Following the major developments of recent years, one can see unparalleled levels of disruptive change in the political, technological, legal, ecological and business environments. It is, therefore, no wonder that many people strive for a sense of meaning, belonging, safety and growth through their work. The RES Forum Annual Report 2018 charts the major trends in relation to Global Mobility (GM) and outlines how the GM function and GM professionals can successfully master the many challenges they are facing. Indeed, the report explores how GM departments can increase their reputation and success while preparing to tackle a dynamic future.

The RES Forum membership now comprises about 750 multinational corporations (MNCs). The members (and in some cases selected GM experts) have given their data and professional opinions in order to trace the key GM trends and their assessment of strengths and weaknesses, threats and opportunities in the world of GM. This report argues that SAFE GM allows MNCs to design, execute and refine successful GM strategies, structures, policies and practices. SAFE GM stands for **Smart** organizational development, **Agile** strategic advice that supports the business and HR strategies, **Flawless** programme management that is highly compliant and employee-oriented and **Efficient** GM people effectiveness work, that is developed based on an in-depth understanding of the motivational patterns and performance implications of assignees. SAFE GM will, in itself, be highly effective – understanding the real purpose of GM within the sphere of key organizational objectives will help to increase the value that the mobility function creates. In addition, enhancing the experience of assignees will also give purpose to their work and augment their engagement with their organization.

Smart Global Organizational Development

Successful GM work is not just smart in the sense of clever, it is also able to create specific, measurable, achievable, results-focused and time-bound objectives for global workers. The role of the global talent manager will grapple with some of the tensions that are often a challenge in developmental work.

Organizations set up talent and career systems and paths that are geared to groups and yet, GM professionals will work with individuals who want a tailored solution in response to their goals and situations. Millennials (and to some extent earlier generations) are already pushing an individualization agenda quite hard. While the systems aspects always have the potential to display tensions with individualized talent management,

developing flexible approaches allows organizations to strive for agility that is becoming ever more important.

The value of smart global talent management lies in the focus on the intersection of organizational and individual interests. Constructing intelligent careers has shown to be valuable to individuals and organizations during and after an international assignment (IA). Where organizations engage assignees and their families, devise high quality and useful talent development and plan ahead for repatriation, they are experiencing higher retention figures and better performance. In addition, their expatriates feel more valued and satisfied with their work abroad.

Agile Global Mobility based on Strategic Advice

GM leaders need to develop agility to align and support their business and HR strategies, to develop value and to adapt quickly to changing organizational needs. Technological advances, automation, artificial intelligence and robotics, the need for new skill sets and dynamic operating models are all expressions of the rapid changes in the business environment. These developments make it necessary to find feasible ways to adapt to them and to harness the opportunities for the organization. Constantly changing requirements, which are already varying among different stakeholders, make it necessary to provide flexibility for assignments.

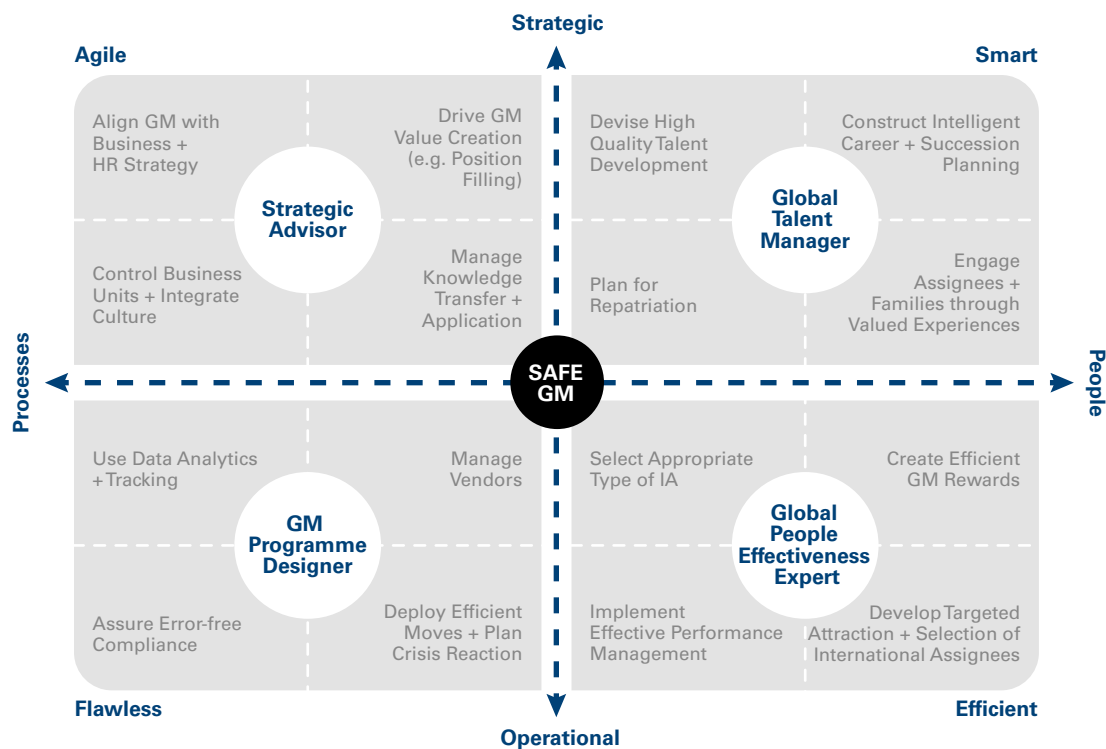
To successfully advance the agility and flexibility of international work in organizations, GM professionals need to fill the role of strategic advisor and to understand the manifold ramifications of their organization's strategy and the diverse GM avenues that could be pursued to realize their MNC's ambition. In practice, this means that GM professionals have to identify how mobility strategies underpin organization-wide strategies. In addition, GM departments need to develop policies that facilitate agility. This might mean, for instance, to develop 'core flex' approaches and to create flexible governance approaches that incorporate agility in relation to exception management.

Flawless GM Programme Design

Too much focus has been given in the past to compliance, while ignoring that it is basically a hygiene factor. Per definition, compliance cannot improve employee experience. Complying with local tax legislation, remaining in the home social security system as promised, obtaining a work permit, adhering to applicable labour laws and the existence of an emergency telephone number when needed, simply do not have the potential to make your assignees happy, whereas the absence of compliance bears the potential for a lot of unhappiness.

The value of high quality programme design lies predominantly in two areas. First, being 'flawless' in compliance is highly important because of the multiple risks that come with non-compliance. Second, successful tracking and data analytics, e.g. with respect to risk identification, vendor performance, security and crisis arrangement evaluation, satisfaction with removal companies, etc., is likely to give information that can improve the GM programme, reduce risks and increase assignee satisfaction. This may go some way to senior managers regarding the programme management role as more than simply operational.

Figure ES.1 SAFE Roles of GM: Purpose, Experience and Value



Efficient Global People Effectiveness Expert

Part of the individualization of the GM role is that of understanding the drivers of individuals within the organization who may want to work abroad. Developing an overview of these motivations allows MNCs to shape their branding of global careers, to refine selection and reward mechanisms to be able to identify the most suitable candidates and to design rewards (not necessarily monetary ones, these could also be job content, talent and career related) that are appealing.

The obvious value of being a people effectiveness expert is in relation to sending better suited assignees abroad who have the appropriate set of drivers for the objectives of the organization. In addition, this allows for the selection of a better matched assignment type whether that be short term, long term, business travel, cross-border commuting, etc. Having superior assignment planning that builds on the individualized candidate information may also lead to improved performance management in relation to the assignment objectives.

Figure ES.1 has charted the SAFE GM territory. It is clear that practicing SAFE international work approaches leads to much higher success and enhanced reputation for GM departments, but only if GM professionals manage to imbue purpose into their work, plan growth experiences into assignments and manage an individualization process of their relationship to globally mobile staff. Below, we outline the report chapters that explain SAFE GM work in detail.

Agile Global Mobility: Living the Purpose and Increasing Value

Chapter 1 concentrates on the dynamic pressures impacting on GM and suggests that agile mobility strategies, structures and policies enable MNCs to shape the future successfully. For this, GM departments need to move out of their comfort zones and out of their silo mentality. They urgently need to understand organizational and HR strategies and should engage intensively with the business. Based on these pressures, a new SAFE Global Mobility model was developed that depicts key roles and activities emphasizing the purpose and valuable experiences of GM.

Ten Recommendations for AGILE Global Mobility Work:

1. Understand the massive and rapid changes that define the world of Global Mobility. Technological advances, automation, artificial intelligence, new competitive pressures needing new capabilities and dynamic operating models create pressures for learning and paradigm shifts.
2. Smart Global Talent Management needs to create tangible results through the management of specific, measurable, achievable, results-focused and time-bound GM objectives. The value of smart mobility approaches lies in the intersection of organizational and assignee interests. This encourages an integration with intelligent career and succession planning.
3. Agile Global Mobility Configurations are constructed through strategic advisory. These need to be based on the corporate vision, business and other strategies and need to be scalable and flexible to react to dynamic competitive developments. In practice, GM professionals have to identify ways in which mobility can underpin organization-wide strategies.
4. Flawless Programme Leadership needs to create high quality compliance and vendor relationship management. Flawless programme management mitigates the multiple risks associated with non-compliance. Successful tracking of assignees and sophisticated data analytics can enable GM departments to analyse their activities and improve them even further while increasing client satisfaction.
5. Efficient Global People Effectiveness Approaches need to understand, attract, motivate and manage the performance of mobility candidates and assignees. This is enabled through the use of more developed global career branding, more sophisticated mobility selection approaches and instruments, as well as a conscious assignment objective setting and management process.
6. Seek the individualization of the GM relationship through smart global talent management and efficient global people effectiveness approaches. Given the need for superior data for the management of assignees, it can also be used to individualize where expatriates are sent, what form of assignment they go on and how they are managed.
7. Continue working towards enlarging the key roles of GM professionals. These roles are seen as important amongst RES Forum members. However, a third of all GM experts still perceive a gap in which roles they fill today and which they would like to fill tomorrow.
8. Improve and expand the work of the GM department. The roles of strategic advisor, GM programme designer (including the focus on due diligence), global talent manager and people effectiveness expert are still insufficiently covered and there are substantial gaps between what GM departments do at present and what roles they would like to undertake in the future.
9. Find the shared purpose of GM work. Beyond using the organizational interest, the purpose needs to incorporate the interests of assignees. This 'mutual purpose' is likely to motivate and energize global workers, resulting in better performance, retention and commitment.
10. Focus on assignee experience. Staff increasingly seek meaning in work and life and good assignee experiences should be valued by expatriates as they are likely to enrich their private and professional lives.

Agile Global Mobility

10 Short Recommendations

1. Understand GM Trends and Pressures
2. Design Smart Global Talent Management Interfaces
3. Construct Agile GM Configurations based on Business and HR strategies
4. Create Flawless Programme Leadership
5. Implement Efficient Global People Effectiveness Approaches
6. Individualize the GM Relationship
7. Expand the work of the GM department
8. Professionalize the various GM Roles
9. Seek the shared purpose of GM work between organizations and individuals
10. Focus on the assignee experience

MNCs are embedded in massive change and are undertaking substantial internal transformations. GM departments and professionals need to understand and shape these changes in order to live their four key roles. Adapting to the new paradigm developed in the table, 'Agile Global Mobility - 10 Short Recommendations', and through the SAFE GM approach, focusing on the purpose and employee experience of working abroad needs sensitive, sophisticated and agile GM approaches. The road to this is steep and challenging. This report hopes to add to the insights in how to effectively tackle these challenges in order to take advantage of the many opportunities of global work.

Smart Organizational Development

Chapter 2 argues that international organizational development and talent management should be supported by GM programmes that have specific, measurable, achievable, results-focused and time-bound objectives. In some sense, many of the GM work areas would benefit from these 'SMART' objectives. The section on organizational development explains the non-monetary HR effects of GM policies and practices on individual assignees. In order to have a clever, bright, intelligent, appropriate and able GM approach, we recommend that MNCs pursue SMART organizational development and talent management strategies and policies in the following sense:

Ten Recommendations for SMART Organizational Development:

1. Work actively on the MNC's employer brand to appeal to external global careerists. This could start with the management of public relations and social media efforts and be translated into the recruitment and selection of staff who are open to the global world and willing to engage in international work.
2. Augment the attractiveness of global work to internal staff. Most firms are struggling to find enough talented staff willing to go onto a global assignment. Showing that assignments 'work out' for expatriates, cross-border commuters and business travellers is highly important so that potential expatriation candidates are not frightened away.
3. Broaden the pre-assignment selection strategy. Using more varied data sources, including emotional intelligence, cultural agility, personality assessments, can increase selection quality and ultimately, GM success.
4. Plan assignment types, locations and durations in a way that assignees acquire the right competencies and build international networks that are useful in their future work. Already, MNCs use a large array of deployment strategies, including targeted approaches for localized employees and business travellers. The transfer of acquired knowledge and skills into the next position after return remains a challenge for many.
5. Devise career planning and progression systems that would allow successful assignees to have better career progression than the average, non-expatriated peer. It appears that firms are already often practicing this which will send a positive signal to potential expatriate candidates. These positive effects are seen to increase with seniority. Being able to bring them further down the hierarchy may increase the supply of GM candidates.
6. Measure the performance of global assignees, be they expatriates, cross-border commuters or business travellers, in relation to the key objectives of their work abroad. At times, these goals may be assignment specific, i.e. going beyond the normal work objectives, and these may need to be assessed by home and host units jointly.
7. Use GM to consciously engage the global workforce. This seems most important for Millennials but has also positive effects for other generations.
8. Plan the repatriation of assignees early. Business sponsors may be highly useful to arrange adequate jobs for repatriates. Long-range career planning (something that is not yet highly common for junior and middle management) is likely to be useful.
9. Develop a retention strategy. Retaining long term assignees during and after assignments is likely to be related to talent development, reward and career aspects (during and after international work) as

well as to good expectation management, flexibility of the employer and the job content in the home organization. Setting specific retention objectives, developing guided coaching of repatriates, providing business coaches and other interventions may be helpful.

10. Assess the effects and value of GM. A sophisticated return on investment assessment that captures the cost and (short and long term) benefits of international work and who reaps these benefits, is still relatively underdeveloped.

Smart Organizational Development

10 Short Recommendations

1. Shape the MNC's global employer brand
2. Increase the attractiveness of global work
3. Broaden and professionalize GM selection
4. Plan assignment types, locations and durations to fit individuals' careers
5. Design career systems that reward GM success
6. Link GM performance assessment to assignment objectives
7. Use GM to engage all mobile generations
8. Plan repatriation early
9. Implement focused retention approaches
10. Assess GM effects and understand GM value

Further recommendations are in relation to Chapters 3 and 4 in this annual report. The first would be to refine the GM reward strategy. This involves a range of activities such as distinguishing the broad array of types of international work, understanding the motivational drivers and goals of potential expatriates and adjusting monetary and non-monetary benefits to these insights. At times, an individualization of the GM contract may be an effect that can lead to a sort of GM 'cafeteria' approach. The second would be to create a programme management approach that is flexible, yet strives for perfection. Tracking internationally mobile staff in order to avoid compliance problems and supporting expatriates in their various needs will be important (see chapter on programme management). Clearly, GM work is highly complex and interrelated and spans many business and HR functions. We urge readers to assess whether the whole of their interrelated GM work can be characterized as 'smart' and if not, whether it can be improved by using a holistic, results-oriented perspective.

Flawless Programme Management

Chapter 3 argues that in a world that is volatile, uncertain, complex and ambiguous the legal and regulatory context is permanently shifting and that hostile environments and market movements need a strong ability of GM departments and their policies and practices to shift, flex and adapt. Hence, complete error-free and optimal GM approaches are not possible. Nevertheless, organizations strive to improve their GM approaches. Flawless GM programme management has at its core, high quality compliance, programme design and service provider relations that would benefit from the setting of specific and measurable objectives. The challenges identified in this chapter and the implicit learning points lead us to suggest that for many companies certain activities and approaches would be useful in optimizing their programme management. These are described in the following ten recommendations.

Ten Recommendations for FLAWLESS GM Programme Management:

1. Strengthen the position and 'clout' of GM departments in order to have suitable and sufficient decision-making power in relation to negotiations and contracting with outsourcing providers, assignees and line managers.
2. Strengthen in-house service provision where appropriate. This can improve service levels and service speeds, flexibility and often provides a superior personal touch. In addition, this may support the strategic positioning of the GM department.
3. Strengthen the outsourcing vendor selection process to take account of the organization's key interests. Overall, these include the need to access up-to-date local and international knowledge and skills, high levels of vendor accountability, an extensive willingness to cooperate with own staff, a large vendor resource base, rapid execution capabilities and a high degree of flexibility to react to non-standard requirements.
4. Consider the use of a multi-vendor approach in order to maintain overall control, to seek cost advantages and to have the ability to choose best in class.
5. Use selective outsourcing in order to avoid resource bottlenecks and to balance the lack of expert and local knowledge where necessary.
6. Use selective outsourcing to overcome compliance issues with line managers and assignees and to clarify process structures, ownership and decision responsibilities.
7. Use selective outsourcing to gain access to local and international expert and service networks and wider market intelligence which can help to shape strategic and operational GM.
8. Consider using outsourcing providers in the areas of household goods shipment, immigration provision, destination service programmes and tax services provision as MNCs often recommend these for their high quality of work.
9. Strengthen the management of vendor relationships to encourage better cooperation levels, more extensive data sharing and to implement process improvements (within the own organization as well as within the outsourcing provider).
10. Strengthen assignee tracking approaches, including the tracking of (extended) business travellers and cross-border commuters in order to improve legal, tax and social security compliance.

Flawless Global Mobility

10 Short Recommendations

1. Augment the position of the GM department
2. Consider in-house provision of GM services where appropriate
3. Strengthen outsourcing vendor selection
4. Maintain overall GM control
5. Use outsourcing selectively to avoid bottlenecks
6. Overcome compliance issues through cooperation with service providers
7. Use outsourcing to tap expert knowledge
8. Identify highest quality outsourcing areas and needs
9. Strengthen vendor management
10. Implement superior assignee tracking

Flawless programme management and compliance is obviously a stretch goal for many MNCs. While this ideal is not readily achievable, any progress must be welcome both for global assignees and their employers.

Efficient Global People Effectiveness

Chapter 4 looks at efficient global people effectiveness work and traces the trends in reward package design within major MNCs. The chapter provides much detail in terms of different reward components in relation to short and long term assignees, local plus staff, frequent business travellers and cross-border commuters. In addition, it identifies differences in terms of business critical/strategic versus developmental assignments and charts some reward components in terms of a variety of issues such as children's education or benefits when working abroad unaccompanied.

SMART GM approaches can refer to longer-term and organization-wide perspectives. The effective package design section of the report focuses more directly on the GM and HR approaches of MNCs in relation to assignees. This part implicitly looks for compensation approaches that elicit specific, achievable and results-orientated behaviours that are measurable during an international assignment. The identified reward approaches allow the reader to benchmark their own GM reward approaches with that of a comparison group of RES Forum member organizations. While this data can help to shape the reward thinking in MNCs, it is important to factor in further contextual, location and assignee population specific considerations.

Multiple and highly pertinent learning points can be distilled from the data and the thoughts embedded in this chapter. The recommendations to improve the effective package design in an MNC organization include:

Ten Recommendations for EFFICIENT Global People Effectiveness:

1. Distinguish different assignment lengths as to develop a suitable reward offer. We have seen that short term and long term assignments are associated with diverse reward components. It is common that MNCs distinguish between local and international contracts. Normally, local plus assignees have compensation packages that are a lot less generous than those of STAs and LTAs. In addition, companies may consider having region-wide international contracts for some staff.
2. Distinguish between different assignment patterns. Cross-border commuters and professionals on extended business travels have different needs and a tailored reward package can be attractive to these global workers while saving resources. However, it seems that organizations have not always developed crucial support structures in response to their idiosyncratic needs.
3. Distinguish different assignment purposes. It has become abundantly clear that developmental assignments are treated less generously than strategic ones. Assignees are likely to be motivated by different (learning and career) factors and have mostly different demographic factors (age, career position).
4. Distinguish between locations and business areas where the supply of mobile candidates is low. Monetary rewards and non-financial rewards in the form of business sponsors, coaches, mentors and career opportunities, may have to be increased in order to attract sufficient and well-qualified candidates.
5. Distinguish powerful actors from less powerful candidates. High potentials and good performers have increased negotiation power. A real challenge for GM reward is therefore to be able to engage flexibly with outstanding performers that they really want to motivate to go onto assignments and yet have an overall GM approach that is perceived to be fair overall and performance enhancing. One non-financial way would be to tailor the business support in the form of organizational sponsors, mentors, peer support and GM/leadership coaches.
6. Distinguish between more and less attractive locations, hostile and safe destinations, in order to tailor rewards and other package elements.
7. Distinguish the performance of assignees. Thus, link some elements of rewards to the overall assignment performance objectives and their achievements.
8. Distinguish the developmental and career interests of candidates within the reward and wider HR system in order to increase the willingness of staff to work abroad, to perform highly and to continue to remain in the organization long term.
9. Distinguish wider motivations to work abroad (including a sense of adventure, learning about specific countries, cross-cultural interests) in order to factor these into the broader assignment offer. These wider

motivations in combination with location context may trigger a form of reward choice/GM cafeteria approach with respect to rest and recuperation or travel entitlements.

10. Distinguish the family situation and other (caring) obligations for expatriation candidates in order to give them a suitable reward offer. Consider where assignees can reasonably be expected to contribute to assignment costs. For instance, evaluate a contribution to housing costs or children's education investments.

Efficient Global People Effectiveness

10 Short Recommendations

1. Distinguish assignment lengths to develop suitable rewards
2. Identify assignment types to develop suitable rewards
3. Understand assignment purposes to develop suitable rewards
4. Assess candidate supply to create adequate incentives
5. Explore the bargaining power of candidates
6. Tailor rewards to location specifics
7. Link rewards to assignment performance and objectives
8. Take account of the developmental and career interests of candidates
9. Appreciate wider interests and drivers in the negotiation process
10. Factor in the family situation when assessing which benefits to offer

We have argued that in order to create 'effective' GM rewards, MNCs need to get the balance right between cost-savings and attractive and motivating compensation approaches. Indeed, it is some of the non-financial initiatives embedded in wider HR approaches (career and talent development systems, attractive psychological contracts, work contents that allow learning and growth, leadership coaching and mentoring) that can be the key components of wider rewards for assignees. To get this particular balance right, it is paramount to understand the diverse target groups of globally mobile employees, have highly developed understanding of and cooperation with the organization's talent management and trace performance implications of the array of tailored GM approaches.

SAFE Global Mobility – Managing Alternative Forms of International Work

The first four chapters of this annual report argue that practicing SAFE GM with a purpose is likely to be useful for all MNCs and across the whole spectrum of international work. The data in these chapters also indicates that in many incidents the dynamic global developments necessitate alternative forms of GM.

Chapter 5 explores the trends and success factors of non-traditional forms of GM, concentrating first on short term assignments (STAs) and then on extended business travel (EBT).

Our data clearly shows that the importance of STAs is rising. While STAs are jigsaw pieces in the overall picture of GM, particularly used for project work and assignments with singular or clearly determined objectives, this development creates a number of opportunities for GM professionals and departments.

Ten Recommendations for SAFE GM using Short Term Assignees (STAs):

1. Use the shorter time frame and superior ability to specify concrete assignment objectives to support agility, flexibility and purpose of the overall GM work. This is strongly aligned to the refined blueprint for GM work that is proposed in Chapter 1.
2. Identify and attract digitally native and communication confident short term expatriates as they will link to the GM self-service platforms more easily, as well as keep up their networks and work relationships with their home base.
3. Select culturally agile, open and confident STAs as their time to adjustment is shorter than that of Long Term Assignees (LTAs).
4. Understand the strengths of LTAs and STAs and make a conscious decision on how to use them. Use LTAs in relation to objectives such as individual development, position filling, integration of organizational culture, the control of the host unit and building the local market.
5. Consider enhancing STA numbers. It is incredibly rare that short term expatriates miss their objectives, in fact, they often overachieve their assignment goals.
6. Channel the performance of STAs. The best performance of STAs is seen by the MNCs to be on projects, general position filling, individual development and knowledge transfer. Utilize suitable candidates for such short term challenges and make sure that they can transfer their own learning and are able to utilize this at home.
7. Understand the career development opportunities of short term expatriates and use these to attract candidates. The best career progression is through STAs with priority on individual development, general position filling, project work or knowledge transfer.
8. Design personalized development, coaching and mentoring initiatives for high potentials and high talents on STAs. The retention of short term expatriates is substantially higher than for longer term global workers, especially if their assignment is linked to general objectives, cultural integration or knowledge transfer back at the home unit.
9. Work towards mastering the key challenges of STAs. Tax, legal and social security compliance are amongst the key problems associated with STAs and they are plainly in the GM remit.
10. Create inventive, flexible and agile approaches to deal with other key STA challenges which include the distance between expatriates and their families, cultural adjustment, work-life balance, social isolation and stress issues.

Managing Alternative Forms of International Work

10 Short Recommendations

1. Specify IA objectives to support agility, flexibility and purpose
2. Attract digitally native and communication savvy STAs
3. Use career development insights to improve attractiveness
4. Select culturally agile, open and confident STAs
5. Understand and use the strengths of STAs and LTAs
6. Augment STA numbers as their goal achievement is high
7. Channel the performance of STAs towards their areas of strength
8. Personalize development, coaching and mentoring
9. Master the compliance challenges
10. Create innovative solutions to deal with important 'soft' STA challenges

MNCs would also be well advised to gain clarity of the particular objectives and deliverables of STAs. The most important benefits to MNCs were getting a specific task and project completed, filling a skills and knowledge gap, organizational learning and knowledge transfer and solving a host unit problem. Distinguishing which global work form (LTAs, STAs, cross-border commuting, extended business travel or virtual project work) may be most suited to the context and the organizational challenge, is highly important to raise the effectiveness of GM work.

The second part of **Chapter 5** focuses on an assignment type that is largely neglected in many organizations: extended business travel (EBT). The data on non-traditional forms of Global Mobility has shown that the use of EBT has substantially increased in recent years and is estimated to continue to grow by GM professionals. While, therefore, the likely importance of business travel also increases, the RES Forum information has clearly demonstrated that the availability of good data and the management of extended business travellers (EBTs) could be substantially improved.

Ten Recommendations for SAFE GM using EBTs:

1. Develop an EBT policy. Only about one in five MNCs have a formal EBT approach which increases the compliance risks. Link it to the business and HR strategy.
2. Be clear about objectives and the competencies that EBTs need to be successful. Most often EBTs are filling a project position, aim for knowledge transfer, fulfil the normal duties of the position or instigate better control of the host team.
3. Distinguish in the selection for general positions that include EBT whether the key goal is inherent in the post (projects/normal work) or whether special competencies are needed (knowledge transfer/control). Set the selection criteria accordingly.
4. Implement a formal tracking approach for EBTs. More than half of MNCs (56%) do not track their EBTs formally which exposes them to legal, taxation and social security risks. GM departments need to work towards having high quality tracking information access in order to refine their compliance approaches.
5. MNCs need to improve their traditional GM activities with respect to EBTs. A substantial number of firms currently experience EBT tax problems, immigration challenges, payroll issues and social security concerns.
6. Go beyond compliance and refine information gathering on EBT issues. Only a minority of MNCs collect information to improve the HR and people management of international workers, ensuring fairness and improving reward structures.
7. Manage the arena of EBT more holistically, including the interfaces with line management. Motivational challenges and health issues such as stress, burn out, long working hours, as well as broader health and welfare issues that include loneliness and work-private life spill-over effects, are hardly ever managed but represent an opportunity to add value to the GM department.
8. Improve the understanding of staff on EBT assignments and thereby the GM department's people effectiveness expertise. Only about one in twenty companies assesses EBT satisfaction. Yet, exploring the thoughts, drivers, experiences and satisfaction of EBTs may give useful information to develop and refine the overall GM and specific EBT approach in the firm.
9. Use more EBTs. The performance of EBTs is either similar or better than other forms of local or international workers. In addition, in some sense, there seems to be a win-win situation in that EBTs, on average, experience more positive career effects than domestic workers.
10. Develop an understanding of the value of EBT and its return on investment. Without improved information and better EBT management the goal to develop better EBT planning and to improve ROI may remain elusive.

Extended Business Travel (EBT)

10 Short Recommendations

1. Develop an EBT policy
2. Identify competencies that increase EBTs' success in their diverse roles
3. Integrate EBT competencies in the selection for global positions
4. Implement formal EBT tracking
5. Design and refine EBT compliance
6. Improve the HR management of EBTs
7. Focus on motivational and health issues of EBTs
8. Augment EBT people effectiveness expertise
9. Use more EBTs
10. Increase ROI through EBT analysis and planning

Through the research into EBTs, it has become clear that these international workers represent neglected assignees. Not addressing this imbalance to other GM areas is a missed opportunity to enhance the quality of GM work and the standing of the GM department. MNCs can benefit substantially if they can refine their EBT approaches and start to consciously manage these global staff.

Final Thoughts

Often, sophisticated GM work already incorporates many of the recommendations that this report develops. Nevertheless, it is advisable to periodically consider whether the approaches of GM departments can be refined or updated. The RES Forum data clearly indicates that in many MNCs, not all of these recommendations are enacted. Especially, the roles of strategic GM advisor, global talent management (interface) and people effectiveness expert are seen to be areas where much progress can still be achieved. This report hopefully provides food for thought that allows the reader to move forward on the road to GM refinement.

My heartfelt thanks to all those RES Forum members who have provided their data and expert considerations. I have learnt a lot from your input. You have made this report possible.

Professor Michael F. Dickmann

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May 2018



Biography **Professor Michael F. Dickmann**
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Michael lectures in the areas of international and strategic HRM. He first worked at Cranfield University during his PhD on International Human Resource Management (IHRM). After being the Global Head of Human Resources in a multinational corporation based in Munich, Germany he rejoined Cranfield to lead its work in the areas of national cultures, global mobility and IHRM. His research focuses on human resource strategies, structures and processes of multinational organizations, cross-cultural management, international mobility, global careers and change management. He is the director of the Cranfield MSc in Management, a highly innovative, practice-centred masters that incorporates an internship with leading-edge organizations.

Michael has published more than 100 academic and professional papers and reports. He is the lead author/editor of four books on international HRM and global careers, part of the acclaimed Routledge series on global human resource management. His latest book *The Management of Global Careers - Exploring the Rise of International Work* is published by Palgrave in summer 2018. Since 2012 he has also been the Editor-in-Chief of *The International Journal of Human Resource Management*.

Michael has a first class honours degree in Economics from Queen Mary University of London and an MSc in Industrial Relations and Personnel Management from The London School of Economics & Political Science. Michael has several years of work experience, both with major consultancies and in industry. He has conducted a variety of consulting and research assignments with cutting edge multinational organizations mostly from the financial, automotive, telecommunications, chemical, electrical engineering and electronics industries. He has also consulted for humanitarian agencies, government and the United Nations. He has worked in his native Germany, Australia, the USA, Colombia, Spain and Britain and speaks English and Spanish fluently.



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London (Canary Wharf)

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Note from the author

Due to rounding, percentages in all figures and tables in this report may not total 100%



Agile Global Mobility: Living the Purpose and Increasing Value



by Professor Michael F. Dickmann and Chris Debner



Asia, Japan
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Chapter introduction by: Vicki Marsh, Equus Software

Head of Operations UK

This year's RES Forum Annual Report highlights that these are truly exciting times for Global Mobility, as recent changes reflect a new level of sophistication across the industry. Building on the rapidly changing market pressures brought about by VUCA (Volatility, Uncertainty, Complexity and Ambiguity) as explored in past reports, GM organizations are up-skilling and achieving the strategic leverage they have been striving to achieve for so many years. I would argue that technological advances have played a large part in this, enabling GM to streamline and automate operational tasks, improve compliance data, and generally free-up more time for strategic aspects of the programme.

At the same time, the mobility ecosystem is gaining strength – organizations are partnering and integrating with their service providers, rather than simply paying them to provide a service. True data collaboration is taking place and the entire GM network has access to real-time information to make smarter decisions and gain predictive insights. This opens the door to a new world of opportunity for GM – providing the transparency and connectivity for employees, HR, and a variety of business stakeholders.

As the global workforce continues to evolve, GM must be able to adapt and respond to changing assignment types, events, regulations, and even generational preferences – all the while supporting the business' overall strategy and bottom line. Awareness of the latest technological tools and techniques provides greater flexibility and visibility for all the stakeholders in the mobility network and ensure the organization retains an edge when it comes to planning for the future.

Perhaps now is the time, with all this data driven evidence at mobility's finger tips, to step back and reconsider GM as a whole? The focus on employee experience has never been higher. It's no longer adequate to provide a compliant operational service. Employees expect flexible choices and options that can accommodate both their personal and professional preferences – whether they're a cross-border employee or on a long term assignment. And GM teams must have the confidence, agility and know-how to support all employee-types and stakeholders across their business.

In this chapter Professor Dickmann has labelled this 'SAFE GM', a consolidation of a wide range of people, compliance, operational and strategic areas, rounding out the mobility professional and creating a platform on which true GM agility can be achieved. Through this approach, the mobility ecosystem is connected via standard integrations across HR, Talent, Reward, and vendor systems, consolidating and sharing appropriate data, and facilitating smooth, holistic communication far beyond simply connecting GM and HR. The possibilities are limitless, and this new environment will both accelerate and benefit from advanced analytical insights to the mobility future.



Agile Global Mobility

Living the Purpose and Increasing Value

by Professor Michael F. Dickmann and Chris Debner

Introduction

We and the organizations for which we work are embedded in a world that is highly volatile, uncertain, complex and ambiguous (VUCA). One thing is clear – this VUCA world is characterized by one constant, and that is change. This chapter of the RES Forum Annual Report explores the pressures that Global Mobility (GM) is facing in this world, providing insights into the roles of GM departments and develops a refined GM model to successfully cope with mobility challenges. This report explicates the SAFE success factors in GM, i.e. Smart organizational development and talent management (Chapter 2), Agile approaches to embrace a multitude of GM challenges successfully (this chapter), Flawless design of programme management and compliance approaches (Chapter 3) and Efficient ways to structure GM rewards (Chapter 4). In this chapter more fundamental issues in terms of the VUCA environment are explored.

Key Recommendations for Agile Global Mobility

1. Understand GM Trends and Pressures
2. Design Smart Global Talent Management Interfaces
3. Construct Agile GM Configurations based on Business and HR strategies
4. Create Flawless Programme Leadership
5. Implement Efficient Global People Effectiveness Approaches
6. Individualize the GM Relationship
7. Expand the work of the GM department
8. Professionalize the various GM Roles
9. Seek the shared purpose of GM work
10. Focus on the assignee experience

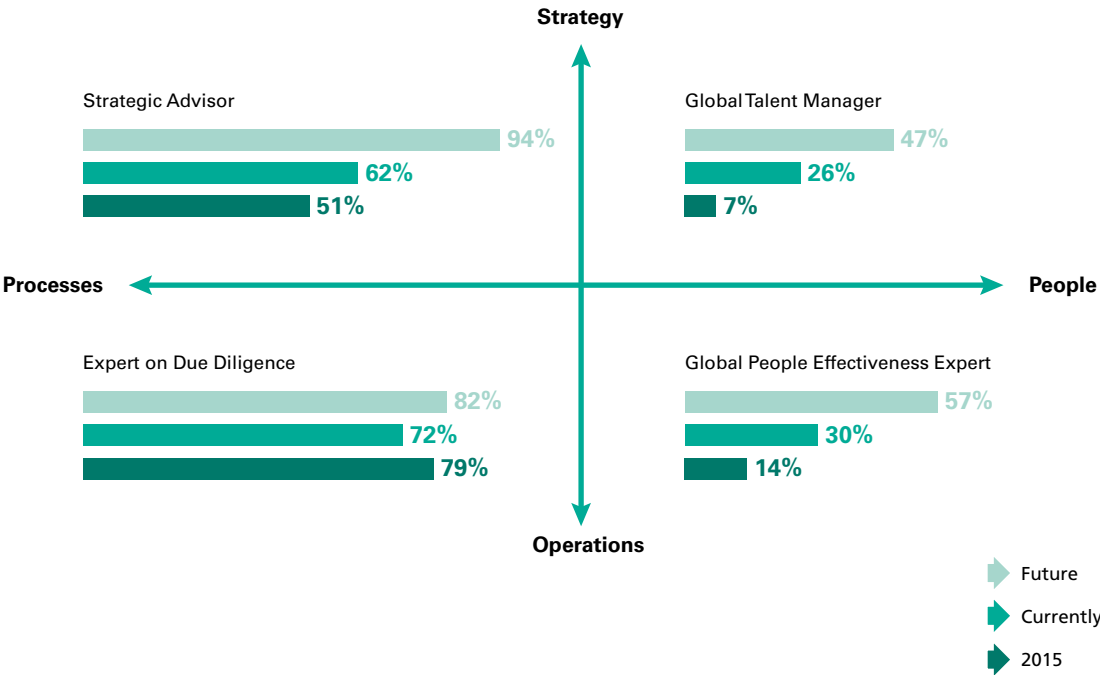


We address the following questions: What are the factors that drive change in Global Mobility? Where will they add value and what are the considerations needed to cope with the change? Why and how do we need to rethink GM to enable it to master its future? We will consider the future of Global Mobility and the necessary changes using three perspectives. First, the mobility function as being a substantial partner in creating organizational and international value. Second, we explore the implications on GM arising from the broader company context and its stakeholders. Third, we want to concentrate on the true drivers of global value, the employees and their varying interests and capabilities.

To add data to expert opinion, we have used information from the RES Forum survey, 'The Role of the Global Mobility Function' that gathered responses until January 2018. A total of 50 GM professionals responded to this survey. They provided insights into the approaches, developments and thinking of mostly large companies. 40% of the multinational corporations (MNCs) surveyed employed more than 25,000 staff with a further 52% having more than 1000 employees. 62% had more than 100 assignees with almost one in five (16%) having more than 500. All respondents worked in GM with two thirds (62%) occupying senior leadership roles while others led particular areas of GM.

We have found in recent years that in most MNCs, mobility work is strongly process and compliance oriented to the detriment of strategic work, talent management and people elements. These are some of the roles that would give GM departments a broader, yet more focused purpose, allow it to strengthen the experience of assignees and would add to the value creation of GM work (see below). In the last three years, however, there were substantial gains for these wider roles. Almost two thirds (62%) of senior GM professionals now work as a strategic advisor (up by 11%). A quarter (26%) now also mostly or always fulfil global talent management roles (up by 19%). Progress towards smart GM management can also be seen by a third of GM professionals (30%) working as global people effectiveness experts (up by 16%). This constitutes massive progress – the percentage of GM professionals influencing talent management has quadrupled and the percentage of GM staff factoring in people effectiveness insights has doubled (RES Forum, 2015).

Figure 1.1 How GM Leaders currently 'always or mostly' act, and how they would like to act in the future

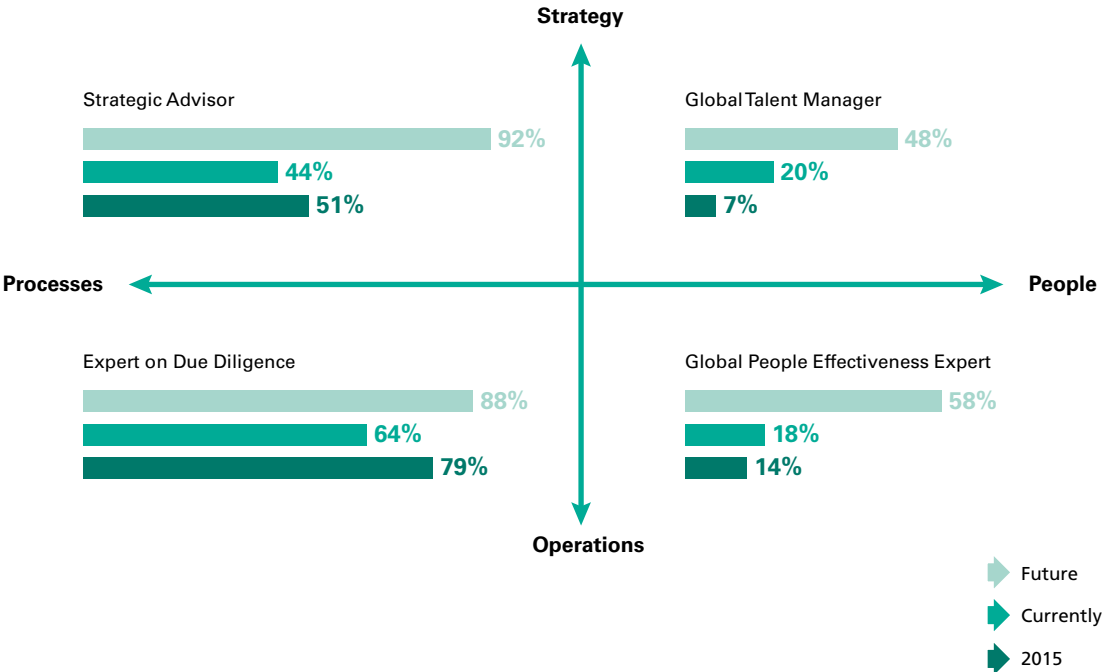


So, are GM professionals enacting the roles they seek to fill, i.e. those that they believe would strengthen GM work? There are still substantial gaps between reality and aspiration. A substantial number (+32%) more would like to be strategic advisors, global talent managers (+21%) or global people effectiveness managers (+27%). Thus, many MNCs still lack strategic GM advice that would help them to lay down long term objectives, direction and focus for their international work. Many, therefore, have an insufficiently defined purpose of GM. In addition, having a massive gap in the areas of talent management and people effectiveness will substantially impact the experience of international assignees as well as the value created through GM.

If some of the GM leaders do not act as they wish, that does not necessarily mean that the whole GM function cannot fulfil this role. However, looking at the whole mobility function does not give more encouraging information. As Figure 1.2 demonstrates, fulfilling these key GM roles is even less common for the GM department than for their leaders.



Figure 1.2 How the whole GM Function currently ‘always or mostly’ acts, and how they would like to act in the future



Interestingly, the gaps between what is happening today and what GM leaders would wish to see in their GM departments in the future are mostly similar. Almost a third (28%) lament a gap in the global talent management role, a quarter (24%) would like to strengthen due diligence and 40% would like to augment their department’s role in global people effectiveness work. Shockingly, there is one area where the gap from today to tomorrow is even more pronounced. Almost half (48%) of MNCs seem to be suffering from a lack in strategic GM advice.

Leading Successful GM Work

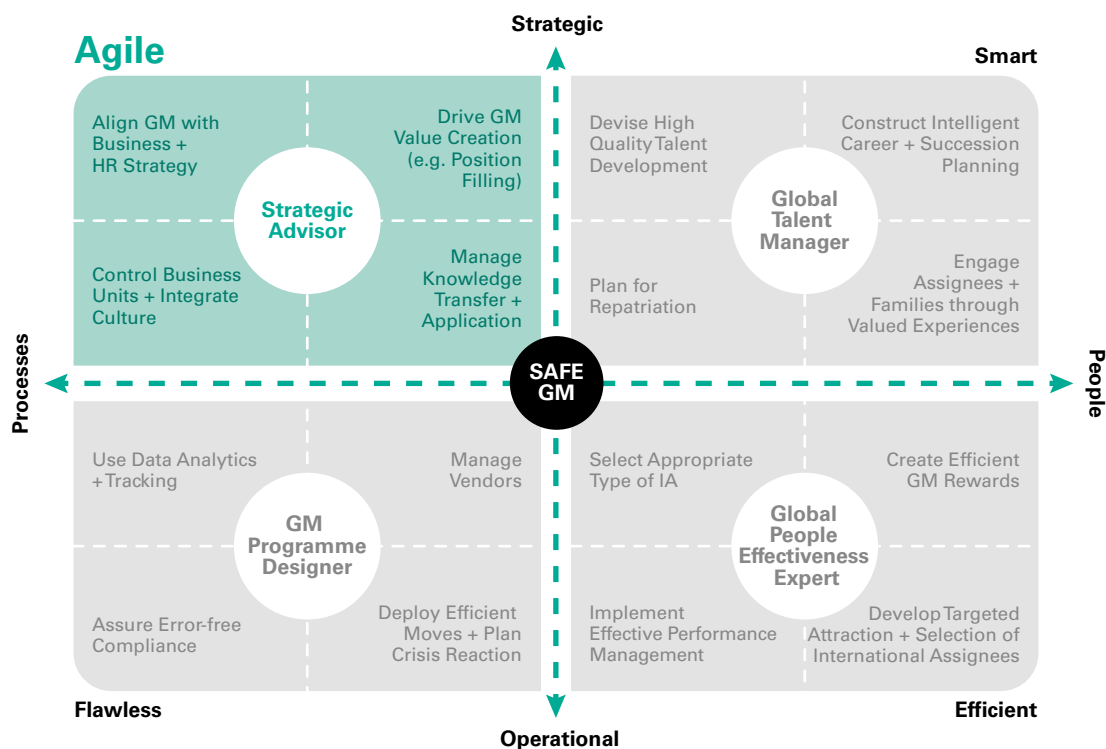
What does the data mean in broad terms and how can Global Mobility be advanced to make it fit for the future? Rethinking Global Mobility is driven by some key trends and drivers. In the following, we reflect on four fundamental GM roles which are driven by six key factors. In these areas we focus on value creation and practical measures.

Role 1: Agile Global Mobility Created Through Strategic Advice

GM leaders need to develop agility to align and support their business and HR strategies, to develop value and to adapt quickly to changing organizational needs. Technological advances, automatization, artificial intelligence and robotics, the need for new skill sets and dynamic operating models are all expressions of the rapid changes in the business environment. These developments make it necessary to find feasible ways to adapt to them and to harness the opportunities for the organization. Constantly changing requirements, which are already varying among different stakeholders, make it necessary to provide flexibility for assignments.

The key value of GM is related to broader business and people management objectives (Edstrom and Galbraith, 1977; Dowling et al., 2013). On a highly strategic level, aligning GM to business and HR strategies in order to enable and support the business in creating value is highly important. These often embody key objectives such as the control of the business units, cultural integration across borders, knowledge creation, transfer and application or enabling certain work activities through filling positions (Dickmann and Baruch, 2011). To successfully advance the agility and flexibility of international work in organizations, GM professionals need to fill the role of strategic advisor and to understand the manifold ramifications of their organization's strategy and the diverse GM avenues that could be pursued to realize their MNC's ambition. Figure 1.3 gives an overview of the breadth of GM tasks and recommendations on how to advance GM excellence. The figure outlines all the SAFE areas and depicts the various roles of GM professionals. While agility refers to the strategic advisor role there are spill-over effects into the other quadrants as the other roles would also benefit from the flexibility to master emerging challenges.

Figure 1.3 SAFE Roles of GM: Agile - Living the Purpose and Increasing Value



In practice, this means that GM professionals have to identify ways how mobility strategies underpin organization-wide strategies. GM professionals need to create business cases for transformational change but at the same time focus on incremental changes. Given the VUCA environment that we face, it is simply not good enough to undertake a transformation every five years. As part of strategic changes, GM departments need to develop policies that facilitate agility. This might mean, for instance, to develop 'core flex' approaches and to create flexible governance approaches that incorporate agility in relation to exception management. Agility will also go a long way to future proof GM and may be expressed in other quadrants of Figure 1.3. Younger generations entering the labour market will likely drive a change in more flexible remuneration approaches, which will also have an influence on compensation and benefits in GM. Dealing with agility in GM means to plan for crisis responses, develop scenarios and approaches to refine the corporate reaction to events such as terrorist attacks or natural disasters. This can include e.g. a cost saving scenario or the plans for potential group relocations (in the light of the Brexit). It will be necessary to stay close to the business and your stakeholders to understand their changing needs and future aspirations. The bottom line is to be prepared as much as possible for potential future demands.



What the Experts say

"I often hear fellow Global Mobility professionals bemoan the failure of the business to give them a seat at the table and the lack of opportunity for strategic input. In my experience, though, we are the masters of our own destiny in this regard. Too often, I see GM experts defaulting to their established processes and outcomes or insisting on a particular outcome and becoming frustrated when their business customer tries to avoid following their advice. We absolutely must remember that we exist because the business needs us to. In a VUCA world, this is even more true. However, that means that if we fail to support the business in its efforts, we risk losing our relevance. With that, we fail to gain a seat at the table. Global Mobility professionals absolutely

must adopt a more commercial and flexible mindset. If the question starts with "can you help me..."; the next word that we utter MUST be "yes". Then we can show how we can deploy our considerable skills and resources for the benefit of our business customer. That means being prepared to flex and adapt our approach, within the constraints of permitted governance. Once we have done that, the seat at the table is offered. You can trust me on this... I've done it."

Nick Jackson
Group Head of Reward
Lloyd's Register
London, UK

Role 2: Smart Global Talent Management and Individualized GM Relationships

Successful GM work is not just smart in the sense of clever; it is also able to create specific, measurable, achievable, results-focused and time-bound objectives for global workers. The role of the global talent manager will grapple with some of the tensions that are often a challenge in developmental work. Organizations set up talent and career systems and paths that are geared to groups and yet, GM professionals will work with individuals who want a tailored solution in response to their goals and situations. Millennials (and to some extent earlier generations) are already pushing quite hard for an individualization agenda. While the systems aspects always have the potential to display tensions with individualized talent management, developing flexible approaches allows organizations to strive for an agility that is becoming ever more important.

The value of a smart global talent management lies in the focus on the intersection of organizational and



individual interests. Constructing intelligent careers has shown to be valuable to individuals (Suutari et al., 2018; Jokinen et al., 2008) and organizations (Inkson and Arthur, 2001). Where organizations engage assignees and their families, devise high quality and useful talent development and plan ahead for repatriation, they are experiencing higher retention figures and better performance (Scullion and Collings, 2006; Dickmann, Suutari and Wurtz, 2018, Doherty and Dickmann, 2012). In addition, their expatriates feel more valued and satisfied with their work abroad.

What are some of the activities necessary to develop smart and individualized GM? There are many roads to Rome but useful activities are centred around understanding and factoring in individual drivers and motivations in the GM attraction, selection and assignment approaches or implementing GM mentor and coaching systems. In addition, it would be useful to truly understand the learning needs of individual assignees (and fit them into the overall development needs of the organization) and to factor these into the career planning for individuals. And last but not least GM functions must think more across functions and engage with relevant stakeholders such as Talent Management, Workforce planning, Travel Management and others. More detailed information is given in Chapter 2 of this report.

Role 3: Flawless Compliance Through GM Programme Design

Too much focus was given in the past to compliance, while ignoring that it basically is a hygiene factor. Compliance cannot improve employee experience. Complying with local tax legislation, remaining in the home social security system as promised, obtaining a work permit, adhering to applicable labour laws and the existence of an emergency telephone number when needed; simply does not have the potential to make assignees happy whereas the absence of compliance bears a lot of potential for dissatisfaction.

The value of high quality programme design lies predominantly in two areas. First, being 'flawless' in compliance is highly important because of the multiple risks that come with non-compliance. Second, successful tracking and data analytics, e.g. with respect to risk identification, vendor performance, security and crisis arrangement evaluation, satisfaction with removal companies etc., is likely to give information that can improve the GM programme, reduce risks and increase satisfaction. This may go some way to senior managers regarding the programme management role as more than simply operational.

Practical approaches in the market to treat compliance for what it really is differ by the size of mobility programmes. Some of the options are depicted in Figure 1.3 under GM Programme Designer. MNCs with larger programmes should consider whether they can maximize the outsourcing of compliance activities to external partners beyond what they are doing today. It would be useful to identify a dedicated professional, or groups of professionals, with a compliance mindset to be in charge of dealing with external service providers and being knowledgeable about the various aspects of the compliance risk. Good vendor management is obviously important. Being in charge means (since compliance is the key hygiene factor) that these professionals are also positioned in such a way that they can make tactical decisions, e.g. on issues and exceptions that would have formerly landed on the desk of the Head of Mobility. In this way, the work is done by the people who are best placed to do it. In a smaller assignment programme, the option to have specialized compliance experts may not be feasible. Specialization is possible only in larger programmes and generalists are typically found in smaller assignment programmes. They should experience at least a different view on compliance and attempt to find efficient external partners to manage it. Chapter 3 in this report gives deeper insights into compliance issues and vendor management.

Role 4: Efficient Global People Effectiveness Expert

Part of the individualization of the GM role is that of understanding the drivers of individuals in the organization who may want to work abroad. Developing an overview of these motivations allows MNC's to shape their branding of global careers (Point and Dickmann, 2012), to refine selection and reward mechanisms, to be able to identify the most suitable candidates, to design rewards (not necessarily monetary ones), that could also be job content, talent and career related that are appealing to individuals.

The obvious value of being a people effectiveness expert is in relation to sending better suited assignees abroad who have the appropriate set of drivers for the objectives of the organization. In addition, this allows the selection of a better matched assignment type e.g. short term, long term, business travel, cross-border commuting, etc.). The data in this report shows that organizations have drawn up different reward offers – e.g. in terms of package design that gives less generous rewards to developmental assignees or that distinguishes between assignment durations. Understanding the motivations of expatriation candidates and factoring these into assignment conditions (say, in deciding between hostile versus family-friendly host locations; dual career implications etc.) should have a motivational effect and may add to the quality of the assignment experience. Having superior assignment planning, that builds on the individualized candidate information, may also lead to improved performance management in relation to the assignment objectives. Chapter 4 on efficient rewards explores these issues in more depth.

The practical approaches to implementing the global people effectiveness role are manifold. They could start in devising a superior global career branding approach (Point and Dickmann, 2012) that outlines the purpose and advantages of international assignments to internal and external candidates. The actual selection of expatriates can be substantially improved (Harris and Brewster, 1999) through the use of psychometric instruments, competency-based interviews or measures to find out candidates' global work motivations. Thus, going beyond the 'coffee machine selection' to have a more sophisticated and formal approach to global staffing is likely to be highly beneficial (Scullion and Collings, 2011). Designing reward systems that are not 'one size fits all' but are responsive to assignment types, locations, lengths and objectives, can also increase effectiveness and efficiency. The importance of this point needs to be reiterated. To achieve this it will be necessary to go beyond the silos in which some GM functions are still working and to engage with other relevant functions and stakeholders. Trying to achieve a better understanding of the drivers of individuals to work abroad and to reap the stated benefits of being a People Effectiveness Expert will not work in isolation.

The data given in Figures 1.1 and 1.2 has shown that many GM leaders see a gap between the current GM strategies, roles and practices and what their aspirations are. Our argument with respect to 'rethinking Global Mobility' has explored the four roles of GM in more depth, but there is more to GM work if an organization truly wants to be fit for the competitive challenges of the future. Beyond SAFE Global Mobility, there are two further, overarching factors that will strengthen GM work.

Global Mobility with a Compelling Purpose

There is a mutual dependency between assignees and their employers (Larsen, 2004). Organizations highly depend on the quality of their international workers while assignees may find themselves 'high and dry' in certain situations in their host environments, especially in hostile or crisis contexts (Bader and Berg, 2013). GM purpose has been predominantly seen through the employer lens and especially incorporates the strategic and operational process dimensions of Figure 1.3.

The value for the organization in determining its key mobility objectives and how GM can support organization-wide strategies have been discussed under the strategic advisor role. However, it is important to go beyond a strategic level to look at the vision of the organization and to long term goals that are attractive to individuals, that they can identify with and that give them purpose. Working abroad will change the psychological contract of assignees and their expectations (Conway and Briner, 2005; Dickmann and Baruch,

2011). Our data clearly indicates that assignees benefit on a range of levels, including their own personal growth and career progression (see Chapter 2). This is what is widely expected by assignment candidates and has been long shown to have a major impact on their decision to work abroad (Hippler, 2009). In terms of the GM programme designer role, letting people down in terms of compliance or security issues will fundamentally rock their relationship with their employers and will have a detrimental effect on their global work and identification with the organization.

The implications are complex and wide-ranging. The intended role and objective of an assignment will have to be analysed in the sense of delivering purpose to the organization and providing purpose to the individual. Thus, corporate knowledge transfer, skills gap filling, control and coordination issues will need to be aligned to the mindset and motivations of assignees. More broadly, even if your company has a purpose statement, it might well make sense to define a team purpose for mobility that is aligned with the company purpose and objectives.

Global Mobility – Focusing on Assignee Experience

Purpose is the new currency for creating attraction, retention and an engaged workforce. Mobility teams need to engage in the purpose of creating positive assignee experiences. A paradigm shift is already happening in HR and HR transformations. In the past they predominantly focused on cost savings and reducing cycle times. Now they are looking at the effectiveness and, not exclusively, the efficiency of change interventions. Treating compliance as a hygiene factor will support the shift towards purposeful GM that aims to enrich the private and professional lives of assignees.

International Assignments (IAs) are undisputedly one of the most significant experiences an employee can have during his/her career. It involves their families and creates great learning and developmental opportunities when living and working in other cultural contexts. Where assignees (and their organizations) avoid or overcome the risks of culture shock, work-life imbalance, family separation, etc. it has been shown that their performance, career progression, talent development and long term retention is highly positive (Chapter 2). This is why Global Mobility needs to focus on employee experience and how to enhance it. In addition, many organizations observe that they have too few, good quality candidates for IAs (see Chapter 2). Delivering an attractive global work experience is likely to widen the pool of assignment candidates which allows a better choice for organizations.

Assuming a relatively flawless programme design, the experience element of GM is mostly shaped by the people dimension of Figure 1.3. It includes the range of activities that were discussed under the roles of global talent manager and global people effectiveness expert. To put this into practice would mean taking a close look at all the interactions that an employee (and their families) experience before, during and after an assignment. It would further involve checking how positive experiences look and how negative perceptions are created. This also involves an analysis of the assignee experience with the many external service providers. Furthermore, the host teams have a strong impact on how an expatriate feels, adjusts to the local culture and performs. Overall, it would be good to engage as many stakeholders as possible in the search for a good GM experience. One step would be to explore what the stakeholders believe has scope for improvement. In practice, mobility departments will need to think and live outside of their silos, engage with talent management colleagues and other internal stakeholders. In addition, they need to understand the purpose and objectives of the assignment and distinguish different and alternative forms of global work that are aligned with purpose (as defined by an employee) and that create valued experiences for employees.

Conclusions and Learning Points

This chapter has concentrated on the dynamic pressures impacting on GM and suggests that agile mobility strategies, structures and policies enable MNCs to shape the future successfully. For this, GM departments need to move out of their comfort zones and out of their silo mentality. They urgently need to understand organizational and HR strategies and should engage intensively with the business. Based on these pressures a new SAFE Global Mobility model was developed that depicts key roles and activities emphasizing the purpose and valuable experiences of GM.

Recommendations for AGILE Global Mobility Work:

- ▶ Understand the massive and rapid changes that define the world of Global Mobility. Technological advances, automatization, artificial intelligence, new competitive pressures needing new capabilities and dynamic operating models create pressures for learning and paradigm shifts.
- ▶ Smart Global Talent Management needs to create tangible results through the management of specific, measurable, achievable, results-focused and time-bound GM objectives. The value of smart mobility approaches lies in the intersection of organizational and assignee interests. This encourages integration with intelligent career and succession planning.
- ▶ Agile Global Mobility Configurations are constructed through strategic advice. These need to be based on the corporate vision, business and other strategies and need to be scalable and flexible to react to dynamic competitive developments. In practice, GM professionals have to identify ways in which mobility underpins organization-wide strategies.
- ▶ Flawless Programme Leadership needs to create high quality compliance and vendor relationship management. Flawless programme management mitigates the multiple risks associated with non-compliance. Successful tracking of assignees and sophisticated data analytics can enable GM departments to analyse their activities and improve them even further while increasing client satisfaction.
- ▶ Efficient Global People Effectiveness Approaches need to understand, attract, motivate and fairly assess the performance of mobility candidates and assignees. This is enabled through the use of more developed global career branding, more sophisticated mobility selection approaches and instruments, as well as a conscious assignment objective setting and management process.
- ▶ Seek the individualization of the GM relationship through smart global talent management and efficient global people effectiveness approaches. Given the need for superior data for the management of assignees, it can also be used to individualize where expatriates are sent, what form of assignment they go onto and how they are managed.
- ▶ Continue working towards enlarging the key roles of GM professionals. These roles are seen as important amongst RES Forum members. However, a third of all GM experts still perceive a gap between roles they fill today and roles that they would like to fill tomorrow.
- ▶ Improve and expand the work of the GM department. The roles of strategic advisor, GM programme designer (including the focus on due diligence), global talent manager and people effectiveness expert are still insufficiently covered and there are substantial gaps between what GM departments do at present and what roles they would like to enact in the future.

- ▶ Find the shared purpose of being globally mobile. Beyond using the organizational interest, the purpose needs to incorporate the interests of assignees. This 'mutual purpose' is likely to motivate and energize global workers, resulting in better performance, retention and commitment.
- ▶ Focus on assignee experience. Staff increasingly seek meaning in work and life and good assignee experiences should be valued by expatriates as they are likely to enrich their private and professional lives.

MNCs are embedded in massive change and are undertaking substantial internal transformations. GM departments and professionals need to understand and shape these changes in order to live their four key roles. Adapting to the new paradigm developed in Figure 1.3 and through the SAFE GM approach, focusing on the purpose and employee experience of working abroad needs sensitive, sophisticated and agile GM approaches. The road to this is highly complex. This report hopes to add to the insights of how to effectively tackle these challenges in order to take advantage of the manifold opportunities of global work.

Main Survey Data Source: RES Forum Survey - The Role of the Global Mobility Function, January 2018, 50 responses.

Mobility Transformation at Cognizant



Case study by Cognizant

Michael J. Krinick,

Assistant Vice President,

Travel and Procurement Compliance at Cognizant

Mimi Ji,

Associate Director, Global Procurement at Cognizant



Cognizant

1. Tell us a bit about Cognizant as an organization.

Cognizant is among the world's leading professional services companies, transforming clients' business, operating and technology models for the digital era. Our unique, industry-based consultative approach helps clients envision, build and run more innovative and efficient businesses. Headquartered in the U.S., Cognizant, a member of the Nasdaq-100, is ranked 205 on the Fortune 500 and is consistently listed among the most admired companies in the world. At year-end 2017, Cognizant had approximately 260,000 employees globally. Our employees are the key to the company's exceptional client service and industry-leading growth. This is reflected in a culture of continuous learning, one where employees are encouraged to innovate and grow their careers.

2. Give us some statistics on your mobility programme today – how many moves do you manage per year, and which locations do you move people to and from?

As an organization, we typically relocate over 20,000 employees per year. We do business globally – in the Americas, Europe, Asia-Pacific, the Middle-East and Africa.

3. What did your mobility programme used to look like and what were the problems associated with the programme?

Historically, Cognizant's relocation process was a culmination of several subprocesses: travel, household goods, immigration and expense management. The process required employees to initiate relocation through each area separately; there was no centralized mechanism to manage the entire process smoothly and efficiently.

4. How did you decide what needed to change?

The initial goals were to streamline the process to improve efficiency and the quality of the employee experience. As we began to access next steps, we were able to identify significant opportunities that not only accomplished these goals but would also contribute to reduced costs. Our initial change opportunities included: case management, household goods expenses, destination services, automobile leasing/purchasing, lease breaks and relocation travel planning/expenses.

5. How did you engage with suppliers to support the changes to your programme?

We teamed up with an RMC to select and manage our suppliers. We use the www.mobilityempowered.com platform for employees to self-initiate the relocation process, and for us to order services, track expenses, pay suppliers and measure overall performance.

6. What steps did you go through?

We used a multistep process, beginning with engaging our various stakeholder groups (e.g. process owners in travel, mobility, HR and expense management) to define a policy and create an RFP to identify a supplier that could help us build a case-based relocation management programme. We developed detailed sub-vendor strategies and sourced necessary suppliers for: household goods moving, automobile shipment, destination services, housing and travel. As a result of the RFP process, we selected our strategic RMC partner, Mobility Empowered. Together, we developed an online self-service relocation requisition and case management tool for use in U.S. domestic relocation.

7. What does your relocation programme look like today?

Employees efficiently self-manage their relocations, through simple, clear policy instructions, automated approval processes and destination education beneath RMC management. We've developed detailed sub-vendor strategies and sourced household goods moving suppliers, automobile shipment suppliers, destination service providers, housing suppliers and travel vendors. All of these suppliers work through our chosen platform to support relocation. More than 13,000 domestic relocations have been handled through the new platform since it was launched in September 2016. The tool is now being customized and expanded for global use.

8. A cultural underpin of self-management is about creating trust, adult to adult relationships and empowerment of employees. What underlying culture exists within Cognizant which supported this transition to self-managed domestic and international mobility programmes?

Cognizant is a very tech-savvy organization and our employee base is highly adaptive to a self-service environment.

9. What is Cognizant's recipe for success in terms of recruitment and retention of talent across the organization?

Hiring the best and brightest and providing an environment where they can continue to develop their careers are essential ingredients in our recipe for exceptional client service, and are the foundation for industry-leading growth. Our talent base has continually expanded to serve the increasingly complex needs of a growing number of clients across industries.

10. Is there anything else you'd like to share?

Our byword is helping clients innovate their business, operating and technology models by leading with digital.

About Cognizant

Cognizant (Nasdaq-100: CTSI) is one of the world's leading professional services companies, transforming clients' business, operating and technology models for the digital era. Our unique industry-based, consultative approach helps clients envision, build and run more innovative and efficient businesses. Headquartered in the U.S., Cognizant is ranked 205 on the Fortune 500 and is consistently listed among the most admired companies in the world. Learn how Cognizant helps clients lead with digital by visiting our website.

www.cognizant.com



Smart Organizational Development

by Professor Michael F. Dickmann



Oceania, Australia
Melbourne (Docklands)



Chapter introduction by: Jose Segade, Co-founder, The RES Forum

The definition and ideal manifestation of 'smart organizational development' will vary from company to company. My view is that this is mainly the result of different internal and external dynamics (culture, industry sector, corporate goals and challenges) which as a consequence inevitably means that the most appropriate responses to some of the key strategic GM questions (who should we move, on what basis, and with what end goal in mind) also need to be tailored to each company's situation (and these responses may also change over time).

As this chapter states, corporate and strategic objectives may not necessarily lend themselves to assignments that are focused around talent development; other priorities such as ensuring corporate control/integration or simply filling long or short term skills gap may prevail in importance. Why might this be so? Traditionally we tend to view assignments as important levers to attract, develop and retain talent, however the clear growth of other forms of mobility such as cross-border commuter or frequent business traveller arrangements demonstrate that drivers of Global Mobility may be less about talent opportunities and more about meeting shorter-term corporate needs.

As a GM professional, being confronted with an ever larger array of different types of global work opens up challenges as well as opportunities. GM strategies, policies and team skill-sets need to be expanded in order to be able to support these new employee populations. Compliance becomes more complex, and the development and maintenance of effective traveller tracking systems becomes ever more critical.

Whilst it would seem premature to sound the death knell for the 'traditional' 2-3 year expatriate assignment, what this chapter also demonstrates is that the non-monetary benefits that assignments can bestow upon employees who are seen to have been successful on an assignment – namely career progression and marketability within the organization – are highly effective levers to help manage key talent populations in MNCs, especially amongst millennials.

Lastly the chapter also shows that the quality of candidate assessment and selection could be further improved. It is rare that personality, emotional intelligence or other psychometric evaluations are undertaken as part of the selection process. Given that emotional intelligence and personality are related to expatriate success, this is an area in which MNCs could also become 'smarter.'





Smart Organizational Development

by Professor Michael F. Dickmann

Introduction

It is beyond any doubt that global talent management and organizational development are highly important and a critical success factor (Scullion and Collings, 2011: 3) in the worldwide competition amongst multinational corporations (MNCs) to win in the market. Chapter 4 in this year's annual report is titled 'efficient' reward management and argues that in order to be able to improve the effectiveness of Global Mobility (GM) rewards, organizations would be well served to understand their assignees, to link assignment success to the expatriates' goals and to offer a range of non-monetary rewards that are attractive to expatriation candidates. It is time for MNCs to use the power of talent management and career progression as well as harnessing their assignees' inner drives and motivations to optimize their GM programme.

Ralph Waldo Emerson has stated that "every artist was first an amateur". It is obvious that the base points of MNCs within the GM and talent management fields are distinct and that their capabilities may vary.

Key Recommendations for Smart Organizational Development

1. Shape the MNC's global employer brand
2. Increase the attractiveness of global work
3. Broaden and professionalize GM selection
4. Plan assignment types, locations and durations to fit individuals' careers
5. Design career systems that reward GM success
6. Link GM performance assessment to assignment objectives
7. Use GM to engage all mobile generations
8. Plan repatriation early
9. Implement focused retention approaches
10. Assess GM effects and understand GM value

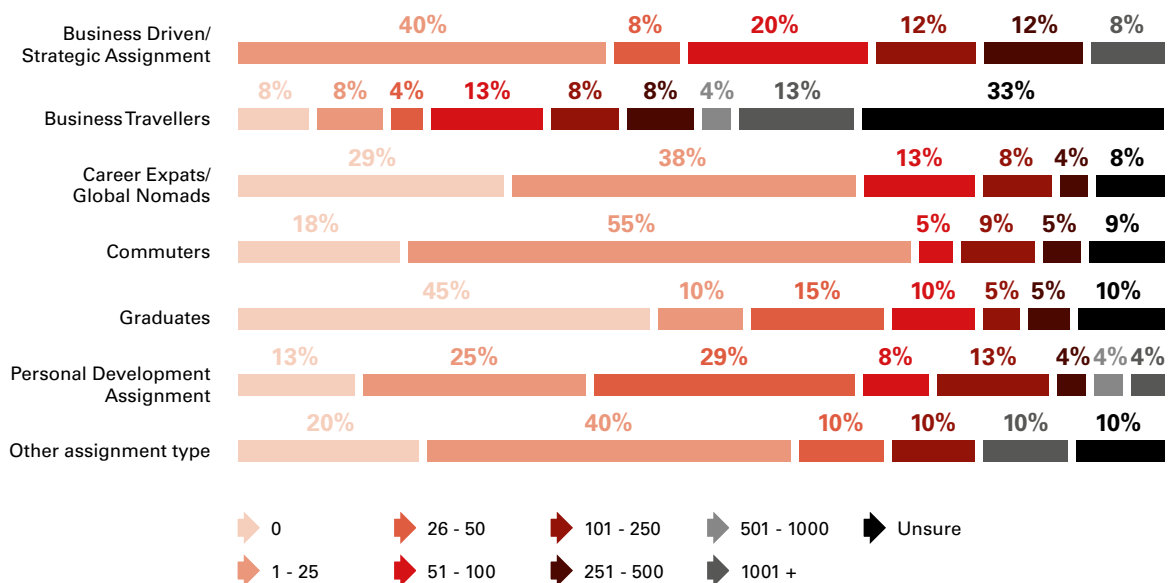


For instance, GM may seek candidates for assignments that are not predominantly about talent development but are geared towards corporate control and integration or simply towards filling a skills gap. Whatever the starting point for assignments is, smart organizational development would be a good thing within the GM arena. 'Smart' in our mind has two meanings. First, smart can be understood in the obvious way as clever, bright, intelligent, apt and able. Second, we would like to argue that firms should use smart organizational development akin to smart goals: creating GM programmes that link to specific, measurable, achievable, results-focused and time-bound organizational development objectives.

Survey Population and Background

The RES Forum surveyed its members, all GM professionals, about "Organization Development (Talent, Resourcing, Development)". The majority (53%) had more than 25,000 employees and there was a wide sector representation, including aerospace and aviation, banking and finance, construction, consulting, energy, FMCGs, manufacturing, professional services and technology. Most firms (80%) operated in 25 countries or more (in fact a quarter (23%) operated in 101 or more countries). Almost half of these large MNCs (46%) sent assignees to 25 countries or more. The total global assignee population is depicted in Figure 2.1.

Figure 2.1 For each of the following assignment types, what is the TOTAL global assignee population of your organization?

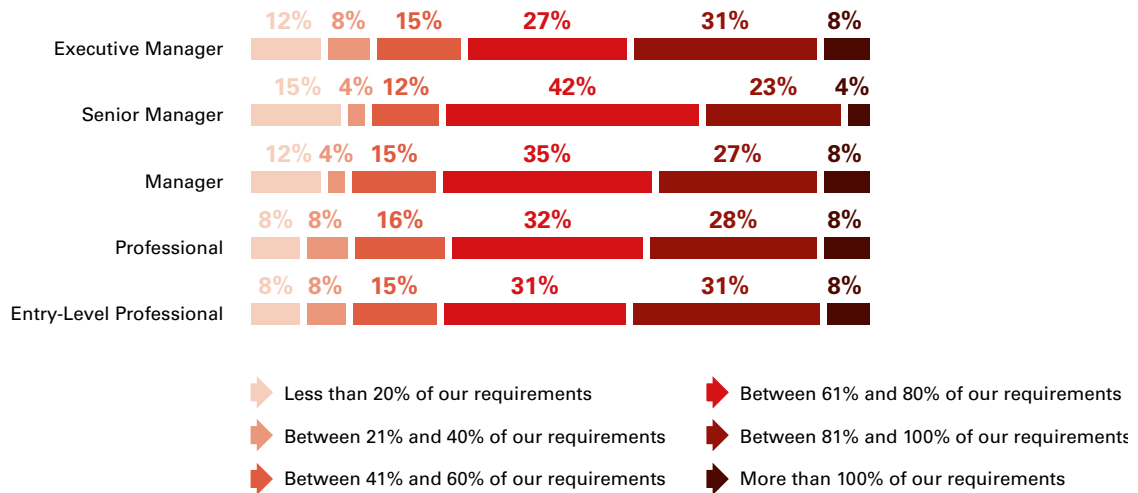


The diversity of assignee population is very high. Traditionally, the GM field distinguishes between short term (STAs); long term (LTAs) and local plus assignees (LPAs). 20% of MNCs had more than 100 STAs, 31% had more than 100 LTAs and 17% had more than 100 LPAs. Figure 2.1 goes into more detail and depicts the percentage of firms that have more than 100 assignees for a range of other types of assignments: 33% for business driven/strategic assignments, 25% for personal development assignments, 10% for graduate assignments, 14% for cross-border commuters, 12% for career expats who are permanently mobile global nomads and 33% for business travellers (a category that a third of respondents did not answer due to insufficient data oversight). This means that many of our survey companies have very large assignee populations and that they are confronted with a large array of different types of global work. GM strategies, GM reward and management approaches and organizational development/talent interventions need to take this into account in order to design tailored and agile approaches.

GM Candidate Availability

About 16 – 20% of the MNCs experienced severe candidate shortages as they had less than 40% of the required candidates for global assignments. In addition, a substantial number of MNCs (ranging from 42% for executive managers to 54% for senior managers) had some difficulty sourcing sufficient expatriation candidates as they could only find between 41% and 80% of their requirements.

Figure 2.2 For your organization, do you feel that you have the required number of employees who are willing to be internationally mobile?



This shortage of required assignment candidates has persisted for a number of years and is truly alarming. Less than one in ten companies say that they have more expatriation candidates than they require. It is important for a firm to reassess its talent recruitment approach (Point and Dickmann, 2012); its selection, talent development, performance, potential, GM rewards and assignment support approaches, in order to manage this situation (Dickmann, 2018; Dowling et al., 2011). Operationalizing a smart - in the sense of specific, measurable, etc. - GM approach may give candidates more certainty in terms of what is expected of them and also a more secure 'pay back' in career terms and development if these activities are spelt out. In addition, providing a good 'deal' in terms of non-monetary assignment factors is known to be attractive to potential assignees (Suutari et al., 2017) and can help to reduce expatriation costs (Dickmann et al., 2008).

What the Experts say

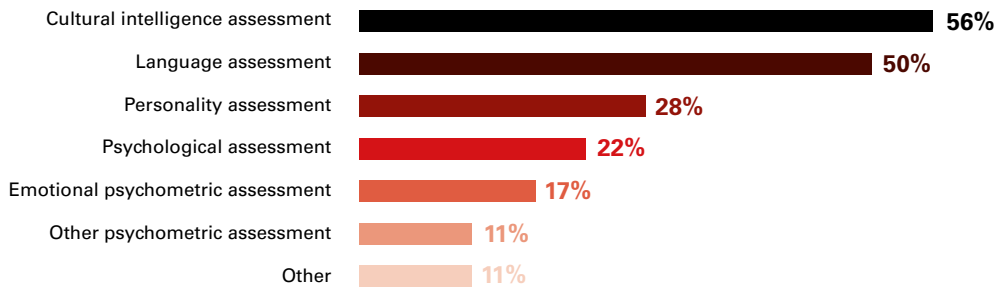
“If managed intelligently, conscious organizational development can offer a great many benefits. Yes, there is the obvious benefit of a global talent pool, ready to go at a moment’s notice and return to base at the whim of their employer. More importantly in my mind, forethought around succession and organizational development can also help to solve a myriad of problems common to a GM head. Designing mobility systems, processes and incentives around developing not just a global talent pool but also one comprising focus employee groups – for example, growing next generation leadership, developing a wider pool of female

leadership candidates or a middle management base that is more reflective ethnically of both your overall employee demographic as well as that of your target markets- is crucial. Furthermore, offering flexibility of working location may also be a way to offset employee demands around pay – a potential win-win situation. Forethought is, of course, a must!”

David Enser
Co-founder
The RES Forum
Munich, Germany

Over time, the RES Forum surveys have indicated that more of the responding companies use cultural intelligence and language assessments. The increased use of more sophisticated selection information is heeding a call to go beyond the ‘coffee machine selection’ (Harris and Brewster, 1999) that was common in earlier decades.

Figure 2.3 What types of pre-assignment selection tools / support do you offer to your potential assignees?

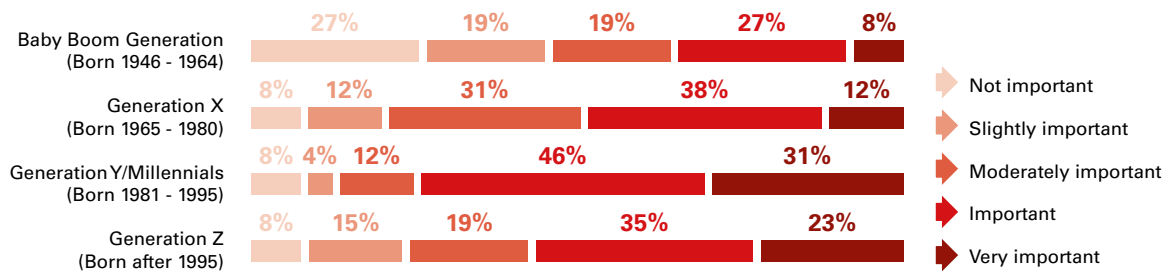


The data shows, however, that the quality of candidate assessment and selection could be further improved. It is rare that psychological assessments (22%), personality assessments (17%), emotional intelligence assessments (11%) or other psychometric evaluations are undertaken. Given that emotional intelligence and personality are related to expatriate success this is an area in which MNCs could become ‘cleverer’ (Caligiuri, 2013).

Global Mobility as an Engagement Tool

For certain generations and in certain situations global work may be more attractive due to a strong sense of adventure, a high willingness to invest in one's own competency development and networks and potentially due to having less caring obligations. Thus, the RES Forum wanted to explore how important assignments may be for different work force generations.

Figure 2.4 How important do you consider that international assignments are as a key driver of engagement across the following workforce generations?

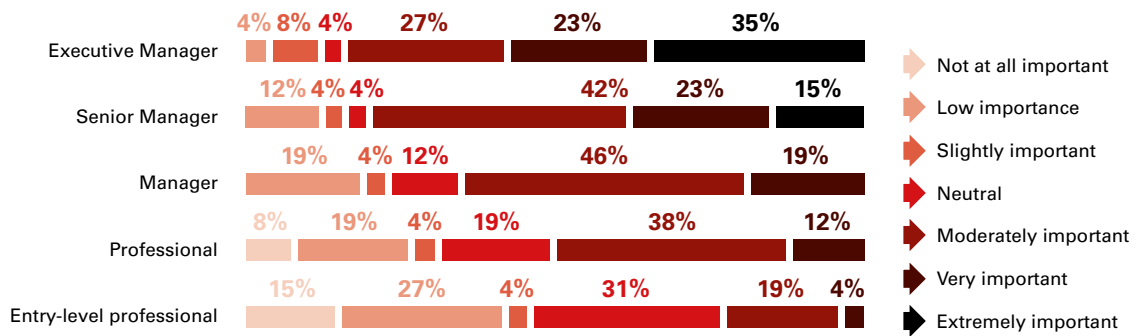


The respondents believe that Gen Y/Millennials (born between 1981 and 1995) value a global career most highly in terms of their engagement (77% important or very important). While other generations also find working abroad important for their engagement (Baby Boomers 35%; Gen X 50%; Gen Z 58%) this is substantially lower. Given that engagement has highly positive effects on the willingness of individuals to stay within an organization (particularly important at the repatriation stage), on the willingness to work hard and on identification levels with the employer, it would be smart to target those individuals who are likely to experience the best engagement effects of working abroad.

Global Mobility and Career Progression

Clearly, Global Mobility enables people to grow as human beings and as professionals, gives expatriates new insights and much to talk about and can be highly useful to their career progression (Haslberger et al., 2013; Dickmann et al., 2016). Indeed, almost half of MNCs in the survey actively marketed the value of an international career (42%). However, there are also some potential drawbacks to working abroad, be they career-wise (Shaffer et al., 2012; Richardson and Mallon, 2005); culture-wise (Haslberger and Dickmann, 2016) or to do with working in hostile environments (Dickmann et al., 2017). Long term studies show that individuals continue to professionally benefit from their increase in learning, networks, motivation and marketability for a long time (Jokinen et al., 2008; Suutari et al., 2017). However, we understand less about how career progression is related to international mobility and hierarchy.

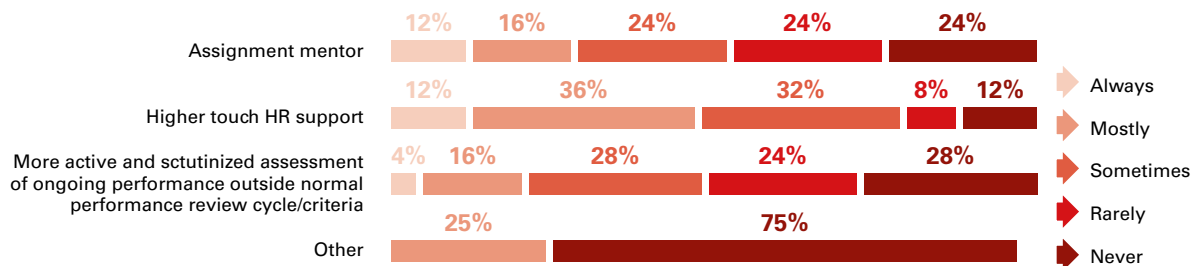
Figure 2.5 At the various management levels in your organization, how important for career progression is it to be internationally mobile?



The RES Forum survey clearly indicated that it is important to be internationally mobile in order to become a member of the key talent population in MNCs. More than half of respondents indicated that this would be very or extremely important (55%). In more general career progression terms, the figure above shows that with increasing hierarchy the importance of global work increases. While for 23% of entry-level professionals international mobility is important for career progression (moderately, very and extremely), this percentage rises to 50% for professionals, 65% for managers, 80% for senior managers and 85% for executive managers. It is obvious that global work experience does not guarantee a senior position. However, it is increasingly one of the enablers of executive careers.

International assignees also often get enhanced HR support, mentoring and performance scrutiny. Figure 2.6 shows how common this is in MNCs.

Figure 2.6 If you use international assignments as key lever for development of talent, to what extent do you use the following approaches?



The survey also showed that 58% of respondents believed that the careers of returning international assignees unfolded better than those of non-expatriated peers. Crucially, not a single respondent indicated that working abroad would be worse for an assignee's career than staying at home (but a lot were unsure of career effects as they did not track the career progression of repatriates). Making these relationships clear to potential candidates and creating a 'symbolic value' of Global Mobility should enhance the supply of expatriation candidates (Doherty and Dickmann, 2009).

What the Experts say

“There is a danger in assuming you know what your people want, and - without validating those assumptions - it can lead to some big, and expensive, surprises. I remain constantly disappointed when something so positive and such a growth opportunity as a well planned and organized international move (be it permanent or temporary) is undermined by the lack of that forethought - why are we doing this, what’s in it for the employer and employee,

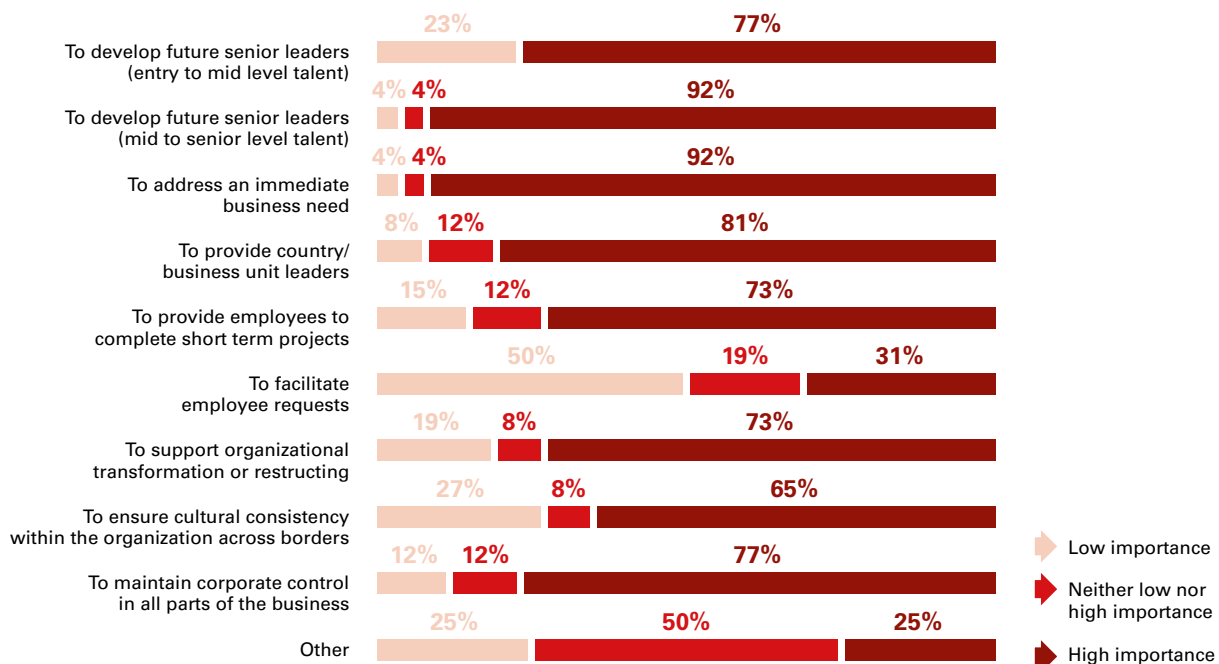
repatriation role, assignment objectives, what package best suits the situation etc; which may risk the loss of high potential people, a significant financial investment and, not least, a reputation as a good employer.”

Susan Gregory
Senior GM Professional
& Former Head of
Talent Mobility
London, UK

Assignment Goals and Talent Management

Aiming for a smart organizational development and talent management approach needs to define overall GM goals. Based on Edstrom and Galbraith’s (1977) pioneering work and on more recent insights, The RES Forum aimed to explore the importance of a set of objectives of international assignments.

Figure 2.7 How important are these objectives of international assignments in your organization?



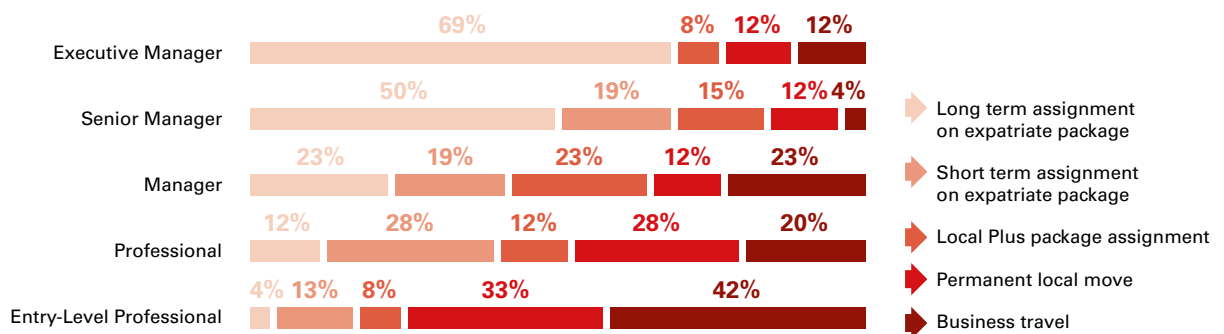
The data (using moderately, very and extremely important) shows that it is highly important for MNCs to develop future senior leaders (from mid to senior level talent) and to address immediate business needs through GM (both 92%). A second set of very important assignment goals include; to provide country/ business unit leaders (81%), to develop senior leaders from entry to mid-level talent and to maintain corporate control in all parts of the business (both 77%). Three quarters of MNCs also felt that supporting organizational transformation and providing employees to complete short term projects (both 73%) were very important. Some of these assignment objectives are probably assessed and rewarded through the normal

performance management processes of a firm, such as the completion of short term projects, to address immediate business needs or organizational transformation/restructuring projects. However, those objectives are linked to the development of senior leaders (and to some extent those aiming for corporate control and cultural consistency) and would benefit from the development of indicators that show whether the individual (and the GM programme overall) is living up to expectations. So far, the indication is that this is happening all too rarely (Doherty and Dickmann, 2012; Renshaw et al., 2018). Thus, developing SMART objectives, be they assessed through general business processes, HR measures or GM indicators, is an important step in refining the overall GM approaches in MNCs.

Deployment Strategies

In terms of their approaches to develop their staff through Global Mobility, companies have a variety of choices. Amongst the top ones are sending people on short or long term assignments, encouraging business travel or facilitating permanent moves abroad hand-in-hand with a localization strategy. Traditionally, long term assignments were very popular and while these continue to be frequently used, other types of global work are emerging. We can see from this and other parts of the RES Forum Annual Report 2018 that firms use a variety of assignment forms. Going beyond this, we wanted to understand what the most common deployment strategies of MNCs were and whether there were emerging trends.

Figure 2.8 Within your top talent group, what is the most common deployment strategy?



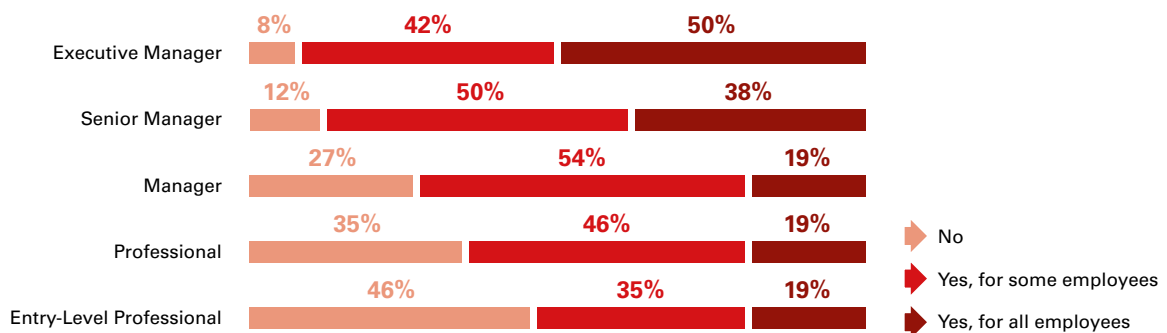
Business travel as a key deployment strategy is most common to lower ranking staff and the most senior executives. Short term assignments, finally, are very uncommon for executive managers (probably as their job spectrum would encompass control and cultural integration activities that need time) and most common for professionals.

It is interesting to note that 12% of all managers' moves and about a third of all professionals' moves are permanent local moves – they are a substantial deployment tool. Together with local plus arrangements these constitute between one and two fifths of the most common deployment strategies. Thus, firms are challenging the idea of expatriate and hardship extra payments for a range of destination countries and locations. Next to monetary savings, MNCs seem to expect a large degree of location flexibility, cultural agility and adjustment from their professional staff in a world that is seen to have become more of a global 'village'. Indeed, if these expectations are part of the psychological, career and development contract of staff within these employers, then firms may reap a range of benefits and this may constitute smart organizational development in our first sense, that of being a clever approach.

Repatriation of Global Assignees

Repatriation is notoriously a difficult time, not so much with respect to the actual physical move but in relation to the reverse culture shock that some repatriates experience, with their (often unfulfilled) career dreams and heightened labour turnover in the first year after return (Doherty and Dickmann, 2012). While we know that often this ‘career wobble’ around the time of repatriation becomes less pronounced in subsequent years, it is during the first 12 months back ‘at home’ that twice as many people leave the organization compared to their non-expatriated peers. One key reason is that career plans and the role at the home do not live up to the expectations of repatriates. Good and long term career planning should be able to alleviate this situation.

Figure 2.9 For the various management levels in your organization, when an employee goes on assignment, do you consider what their NEXT role will be when they repatriate?



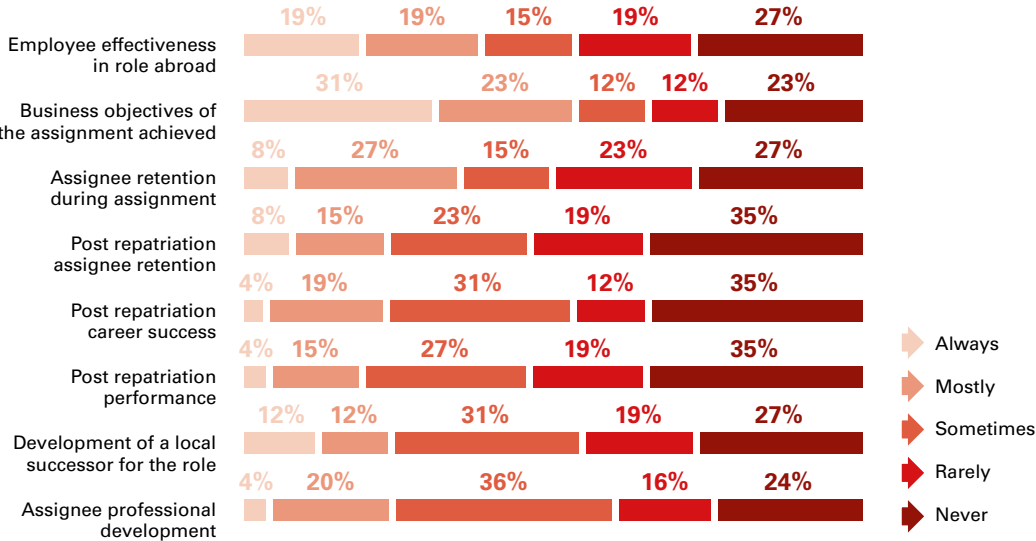
The data show that higher ranked staff have a much better chance of having longer term career plans than entry-level professionals, professionals or managers. Half of all firms plan at least one role ahead for all their executive managers (and a further 42% for some) and more than a third of MNCs do so for all their senior managers (38%) with a further half conducting longer term career planning for some of these. Some firms even plan two roles ahead for all their executive managers (15%). Long term career planning is not dead for at least some employees regarded as talent. In addition to the above, two thirds of MNCs plan two roles ahead for some of their executive (62%) and senior (65%) managers. Two fifths of companies plan two roles ahead for some of their managers (42%) and one fifth for some of their experienced professionals (23%) and entry-level professionals (19%). The repeated calls from academia are beginning to be heeded.

Measurement of Return on Investment

Half of the surveyed MNCs carry out an assessment that compares the value for employees versus the value for the business before determining the specific assignment types for working abroad. This assessment is not only useful to determine the most suitable form of global work (Baruch et al., 2013) but it can also give useful arguments in the search for and negotiation with potential expatriates.

MNCs have for a long time argued that they need to assess return on investment (ROI) more effectively. In fact, it seems that many companies look at costs primarily to draw up the business case for working abroad and pay less attention to the myriad of benefits. These are often more difficult to assess and it seems that in many organizations a ‘gut feeling’ and/or a vague but strong persuasion that sending an assignee into a specific location is beneficial, seems to be regarded as sufficient (Doherty and Dickmann, 2012; Renshaw et al., 2018). While it is theoretically important to distinguish value creation (through what and who) and utilization (to whom and when), the RES Forum survey attempted to look at some broad areas.

Figure 2.10 To what extent does your organization measure the following areas in terms of return on investment (ROI) of international assignments?



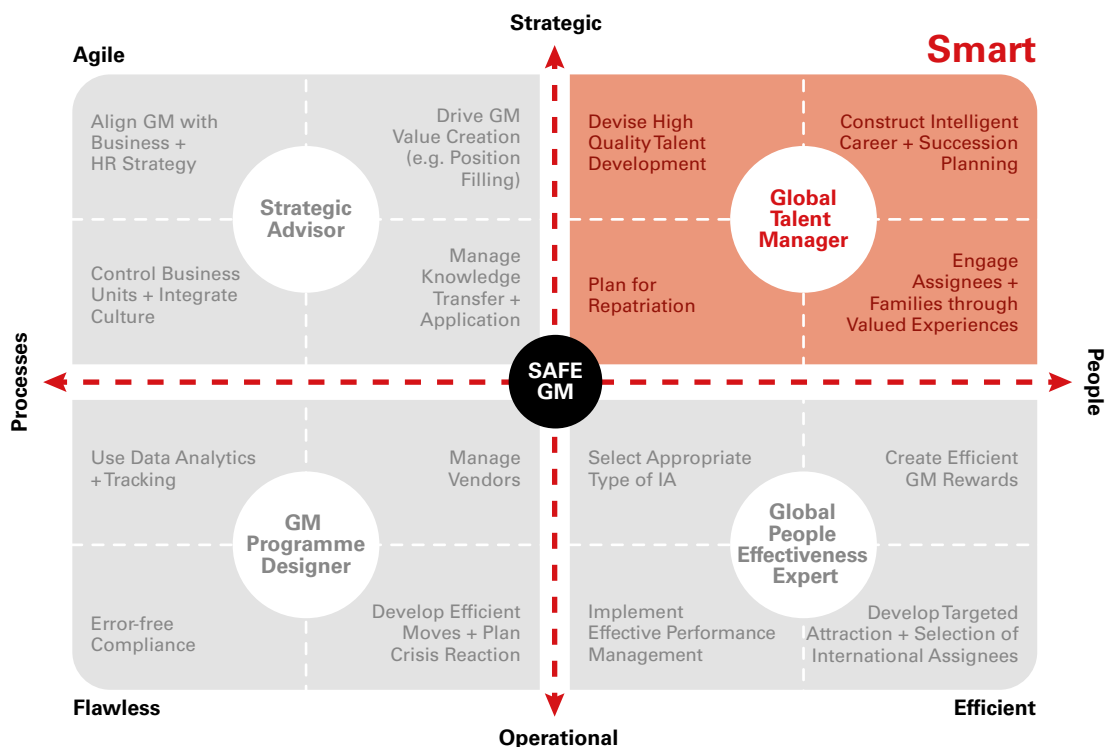
Most often, MNCs assess whether the business objectives of an assignment were achieved (31% do this always and a further 23% mostly). The second most popular measurement is related to employee effectiveness in the role abroad (19% always and 19% mostly). However, post repatriation performance (4% and 15%), career success (4% and 19%) and assignee professional development (4% and 20%) are much more rarely measured. Retention during (8% and 27%) and post (8% and 15%) assignment, as well as the development of a local successor (12% and 12%), are marginally more often assessed. The understanding of ROI in GM is still underdeveloped and therefore, the link to the purpose, value creation and ultimately value utilization of global work, could be clarified more strongly (see earlier chapter in this report).

Conclusions and Learning Points

We have argued in this chapter that international organizational development and talent management should be supported by GM programmes that have specific, measurable, achievable, results-focused and time-bound objectives. In some ways, many of the chapters of this year's RES Forum Annual Report would benefit from these SMART objectives. The flawless GM programme management part has at its core high quality compliance, programme design and service provider relations that would benefit from the setting of specific and measurable objectives. While this refers to longer term and organization wide perspectives, other parts of our report focus more directly on the GM and HR approaches of MNCs in relation to assignees. The section on efficient rewards in GM implicitly looks for compensation approaches that elicit specific, achievable and results-orientated behaviours that are measurable during an international assignment.

This smart approach to organizational development is depicted in the global talent manager role. Figure 2.11 shows SAFE GM with a purpose. Fulfilling the role of a global talent manager as a GM professional does not necessarily mean to run the learning or development department in an organization. Instead, it concerns managing the interfaces with the learning/ talent functions in such a way as to aid individuals to invest in their talent development through working abroad. It means to drive or cooperate in constructing intelligent career and succession planning. In addition, the purpose and experience orientation of GM can support the long-term engagement of assignees and their families during and after their sojourn overseas, especially if repatriation is planned and executed smoothly.

Figure 2.11 SAFE Roles of GM: Smart Organizational Development



In addition to presenting data and conclusions on how to shape smart global talent management, the current chapter explores the non-monetary HR effects of GM policies and practices on individual assignees. In order to have a clever, bright, intelligent, appropriate and able GM approach, we recommend that MNCs pursue smart organizational development and talent management strategies and policies in the following sense:

- ▶ Work actively on the MNC's employer brand to appeal to global careerists. This could start with the management of public relations and social media efforts and be translated into the recruitment and selection of staff who are open to the global world and willing to engage in international work.
- ▶ Augment the attractiveness of global work. Most firms are struggling to find enough talented staff willing to go onto a global assignment. Showing that assignments 'work out' for expatriates, cross-border commuters and business travellers is highly important so that potential expatriation candidates are not frightened away.
- ▶ Broaden the pre-assignment selection strategy. Using more varied data sources, including emotional intelligence, cultural agility, personality assessments, can increase selection quality and ultimately, GM success.
- ▶ Plan assignment types, locations and durations in a way that assignees acquire the right competencies and build international networks that are useful in their future work. MNCs already use a large array of deployment strategies, including targeted approaches for localized employees and business travellers. The transfer of acquired knowledge and skills into the next position after return remains a challenge for many.
- ▶ Devise career planning and progression systems that would allow successful assignees to have better career progression than the average, non-expatriated peer. It appears that firms are already often practicing this which will send a positive signal to potential expatriate candidates. These positive effects are seen to increase with seniority – being able to bring them further down the hierarchy may increase the supply of GM candidates.
- ▶ Measure the performance of global assignees (be they expatriates, cross-border commuters or business travellers) in relation to the key objectives of their work abroad. At times, these goals may be assignment specific, i.e. going beyond the normal work objectives, and these may need to be assessed by home and host units jointly.
- ▶ Use GM to consciously engage the global workforce. This seems most important for Millennials but also has positive effects for other generations.
- ▶ Plan the repatriation of assignees early. Business sponsors may be highly useful to gain adequate jobs for returnees. Long-range career planning, something that is not yet highly common for junior and middle management, is likely to be useful.
- ▶ Develop a retention strategy. Retaining long term assignees during and after assignments is likely to be related to talent development, reward and career aspects (during and after international work) as well as to good expectation management, flexibility of the employer and the job content in the home organization. Setting specific retention objectives, developing guided coaching of repatriates, providing business coaches and other interventions may be helpful.
- ▶ Assess the effects and value of GM. Sophisticated return on investment assessment that captures the cost and (short and long term) benefits of international work and who reaps these are still relatively underdeveloped.

Further recommendations are in relation to two other chapters in this annual report. The first would be to refine the GM reward strategy. This involves a range of activities such as distinguishing the broad variety of types of international work, understanding the motivational drivers and goals of potential expatriates and adjusting monetary and non-monetary benefits to these insights. At times, individualization of the GM assignment terms may lead to a GM 'cafeteria' approach (see chapter on efficient rewards). The second would be to create a programme management approach that is flexible, yet strives for flawlessness. Tracking internationally mobile staff in order to avoid compliance problems and to support expatriates in their various needs will be important (see chapter on programme management). Clearly, GM work is highly complex and interrelated and spans many business and HR functions. We urge readers to assess whether the whole of their interrelated GM work can be characterized as 'smart' and, if not, whether it can be improved by using a holistic, results-oriented perspective.



Main Survey Data Source: RES Forum Survey - Organization Development (Talent, Resourcing, Development), December 2017, 26 responses

Insights additionally used from Survey: RES Forum Survey - Talent Management, December 2017, 18 responses



Oceania, Australia
Adelaide (Port)

Diversity and Inclusion as a Global Mobility Policy



Expert view by LEXICON Relocation
Melanie Klaschka, GMS
Director, Global Business Development Strategy



Global Mobility is innately an advocate for diversity. We move people all over the world to increase business intelligence, global mindsets, and diversity of thought. We encourage and advocate for cultural competence when we send expats to a foreign country. However, how often are we aligning with Diversity and Inclusion leaders to achieve the strategic goals for the company?

In 1890, William James noted the fact that “human beings have a fundamental need for inclusion and belonging.” Diversity and inclusion (D&I) have proven to create competitive advantages with talent for companies and increase bottom line revenues. According to a Deloitte survey from 2015, “companies with an inclusive culture have 22% lower employee turnover”. Combine that with McKinsey’s latest inclusion and diversity report finding that companies with higher gender diversity in their executive teams are 21% more profitable. An even greater increase of 33% higher revenue is attributed to ethnic/cultural diverse executive cultures.

Ethnically diverse executive cultures experience



Workforce planning and diversity and inclusion currently work side by side to make sure companies are appealing to and are retaining talent. Global Mobility has an opportunity to elevate the discussion and position GM not only as an advocate for diversity but as a collaboration tool for attracting diversity. Now is the time to align with diversity and inclusion to:

1. Ensure our language attracts a diverse expat population
2. Have our policies reflect and represent the diversity
3. Plan for repatriation to maximize the diversity of thought that each expat brings home with them.

Language

One key tool diversity and inclusion uses to measure success is the pool of candidates applying for each role. KPIs judge the language used in job profiles and advertisements by measuring the percentage of 'diverse' applicants that have not only applied for but have been chosen for consideration. Pitfalls occur when companies take on diversity, and subsequently Global Mobility, from a single point of view. Typically, American-centric companies have 'cultural jungles' (Philip Berry, PB Associates) that create policy and language for the entire company. These 'jungles' may not intrinsically see diversity from other points of view. Christopher Bylone, Global PMO Diversity and Inclusion, International Flavours and Fragrances, gives an example, "IFF views ourselves as 'global company that just happens to be headquartered in the USA' and this really helped break the mould of how other US companies carryout a Diversity & Inclusion programme". Bylone goes on to describe diversity from a global perspective "diversity looks different in every corner of the world. It is important to approach from the local interpretation and adapt our approach accordingly". Global Mobility can also face these pitfalls when our assignment postings, policy language, and opportunities do not inherently represent the (internal or external) candidate pool. An alignment with diversity and inclusion provides the opportunity to share best practices, synchronize strategies and contribute to the corporate vision.

Policy

Further to the language of our policies are the policies themselves. As we attract a broad candidate pool and encourage diverse culture, do we in GM have policies to mirror and represent what diversity and inclusion and the broader company, look to accomplish? Traditionally – expats have been men, usually single, on assignment for 2-3 years. As GM has matured and grown, we have seen more women go on assignment and 'traditional' families change. Now non-traditional families including domestic partners, gay couples, dual career partners, just to name a few, are becoming more frequent. This diversity forces us to look at our policies and revise them. Most companies use exceptions - however, there is a significant impact on the overall success of our programmes. Exception management increases both soft costs and actual expense. According to Oliver Meier with Mercer, "Used too frequently, {exceptions} can destroy the consistency of your mobility policy, lead to inequity among international assignees, and create employee retention problems as well as cost issues". The need to work with D&I increases to make sure GM policies reflect the talent gamut represented in the company. Simple changes include recognizing partners, whether married or not. Changing the definition of families to include extended family will encourage cultures where larger families live together. Even giving mind to flexible working terms gives parents an additional incentive to take assignments. One well-known consumer goods company has built a team of diverse GM professionals to actively provide input into the creation and development of policy. "If we are too ethnocentric, we lose sight of other perspectives. We must incorporate elements of diversity in GM [policy]."

Repatriation

It goes without saying that the most impact expats can have is the diversity of thought they provide upon repatriation. Succession planning has long been identified as a key factor in GM assignment success, and the topic of repatriation is a constant topic at industry events. According to the Society for Human Resource Management (SHRM) "the decision to send an employee overseas should be made holistically, taking into account a host of factors: career management, individual preparedness, cross-cultural disposition and family readiness". Average turnover rates for repatriates have been said to reach 25%. If a company on average relocates 100 employees per year and 25 of those employees have left due to improper succession and repatriation planning, millions of dollars spent not only on the actual relocation cost, but the

intellectual property they've developed while abroad, has now just walked out the door – likely to a competitor. A repatriation culture and programme that recognizes the diversity of thought the employee brings back with them can help in the transition process. The largest complaint repatriates have is the lack of worth their new skills seem to have back home. Incorporating these skills is vital to the success of any multinational organization and ultimately a GM programme.

Strategic Partnership

The alignment of GM with HR, talent management and ultimately D&I not only makes sense but is an organic symbiosis. These departments working together and complementing each other cannot only better prepare the expatriate's assignment but also their repatriation into the home country and the progression thereafter. If GM managers have identified the candidate as high-potential, the loss we suffer after a repatriate leaves is far greater than the work it takes to plan ahead. The statistics are clear: Over 350 CEO's from around the world have signed and committed to creating measurable action to increase inclusion in their workplaces (www.CEOaction.com). There is no better time than now for GM to contribute more strategically to the conversation. "The price of light is less than the cost of darkness" (Richard McDonald). As we undertake the shifting role of GM, part of that shift is moving from an administrative role to a strategic partner. Actively supporting company strategy and aligning with Diversity & Inclusion can move Global Mobility out of the darkness and into the (lime)light.

About Lexicon

Lexicon Relocation is a leading provider of Global Mobility services. With a focus on providing flexible solutions for clients of every size, Lexicon Relocation supports corporate and government organizations, their employees and their mobility programmes throughout the world. Lexicon Relocation has full-service facilities strategically located around the world in Shanghai, China; Newbury, England; Shelton, CT; Atlanta, GA; Cincinnati, OH; and Irvine, CA, with corporate headquarters in Jacksonville, FL. By staying true to the basic principles that have been in place since Lexicon Relocation's inception in 1993, most importantly listening to the needs and the voice of customers, Lexicon Relocation focuses on what is on the horizon and creates effective and economically grounded solutions. Innovation is at the very core of Lexicon's business model and they continually reinvent the way they serve customers. Lexicon Relocation brings the world to your doorstep, one employee at a time.

www.lexiconrelocation.com

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Oceania, New Zealand
Wellington





Flawless Programme Management

by Professor Michael F. Dickmann



North America, United States
Florida



Chapter introduction by: Paul Bernardt, Harmony Relocation Network *Managing Director*

Chapter 3 of the report focuses on GM programme management and introduces the concept of flawless execution in delivering value to the organization as well as delivering outstanding employee experience. One aspect of this discussion that remains, focuses on questions surrounding which activities add value to the organization and the employee experience, and which don't.

Throughout the 1990s, a significant evolution in the concept of company organizational design was the recognition that repetitive processes could be centralized, standardized and in turn outsourced to achieve even greater efficiencies from a process, technology and cost point of view. The central argument was that companies who executed such organizational changes could focus on core specialisms which add greater value to the organization. This phenomenon has continued and evolved since the 1990s, and though we periodically hear and observe the cycle reversing, the overall direction of travel is one of assessing value and outsourcing where the activity does not add value or improve productivity. HR quickly introduced its own version of this phenomenon via the Ulrich model, with non-core or non-value adding activities such as payroll or expense management often being outsourced to a provider who could derive greater value from running the processes. GM and the outsourcing of significant internal GM processes to external outsourcing providers was soon quick to follow suit.

So what am I, the MD of a global network of shipping companies going to recommend? It is quite easy actually – the answer is not about finding one insourcing/outsourcing solution that fits all companies but rather is about adapting the solution to the customer and the organization's needs... and if we substitute customer with 'employee' or 'colleague' then the implications for HR and people management can be equally powerful.

For any GM programme leader, the questions to ask are:

- Why are we completing this activity?
- Does it add value to the business or is it a cost centre?
- If it does add value, how do you articulate that (Financial, Productivity etc)?
- What does the activity add to the colleague experience?
- For colleagues, is it a hygiene factor or an activity which can improve productivity?

If the answer to the last question is that it improves productivity, then the activity can be considered value add in terms of employee engagement– this would be the kind of activity of which a company might wish to take ownership. If on the other hand the process is a cost centre such as the provision of relocation services to employees, or is merely a hygiene factor, then it might be time to think about outsourcing the activity to a provider who is an expert in that specific area and can create value.





Flawless Programme Management

by Professor Michael F. Dickmann

Introduction

The flow of international assignees and the related compliance work are determined by a range of economic, political and legal factors. Host countries use a number of criteria when determining an individual's right to live and work within their borders. These may include the domestic supply of skilled labour, the assignee's educational background and skills levels. Immigroup (2015) rates Brazil, Israel, Norway, New Zealand, United Arab Emirates, USA, Singapore, Germany, Australia and Canada as the most immigration friendly countries in the world. Most of these countries actively seek (self-initiated) expatriates in order to strengthen their economies and skills base. For instance, New Zealand has accredited employers that can hire and bring in foreign talent relatively unimpeded (Shachar, 2006: 182). Canada amongst other countries, has followed this initiative of making it easier for highly skilled individuals to enter its territory and to seek employment. Students are also seen as valuable resources in this 'race' for talent (Geddie, 2015). Nevertheless, foreign nationals entering a country are still often seen as 'lucky to be there' rather than being thanked for adding to the competitiveness of their host state and for undertaking the often difficult transition to their new host location (The Economist, 2017). Crucially, different national jurisdictions have different legal regulations and many are not as open to foreign talent as the countries mentioned above. Therefore, compliance work is highly complex, diverse and important within the Global Mobility (GM) field.

Cornelius Fitchner, a Swiss project manager, argued that "planning without action is futile, action without planning is fatal." Assigning an employee without going through the right immigration processes and being caught by that country's administration or legal enforcement arm is likely to have drastic consequences for both the employees and their employer. Clearly, multinational corporations (MNCs) would rather avoid this scenario which makes the compliance aspects of programme management paramount. And yet, it seems from RES Forum data provided by members in 2015 and 2016 that some companies' extended business travellers are subject to substantial immigration risks. Taking a broader perspective, it is obvious that MNCs would prefer to have seamlessness and perfection in GM programme management. This chapter aims to track companies' programme management and compliance activities, outsourcing approaches and their experiences and fault lines within these activities. In so doing, ten key recommendations to improve flawless programme management are proposed. The last part of the chapter will draw up conclusions and learning points.

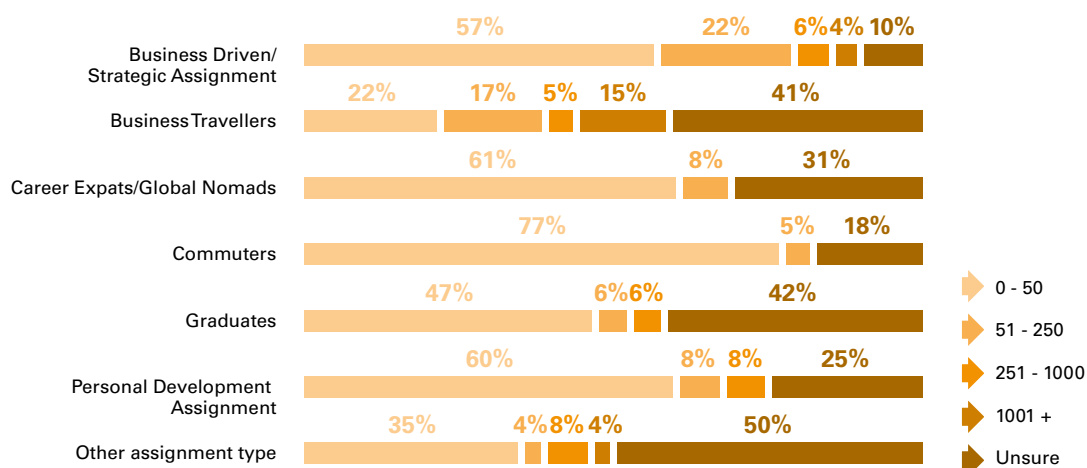


Key Recommendations for Flawless Global Mobility

1. Augment the position of the GM department
2. Consider in-house provision of GM services where appropriate
3. Strengthen outsourcing vendor selection
4. Maintain overall GM control
5. Use outsourcing selectively to avoid bottlenecks
6. Overcome compliance issues through cooperation with service providers
7. Use outsourcing to tap expert knowledge
8. Identify highest quality outsourcing areas and needs
9. Strengthen vendor management
10. Implement superior assignee tracking

The data for this chapter was predominantly gathered from the RES Forum survey, 'Programme Management and Compliance 2017', which was answered by 54 companies. More than two out of five respondents worked for an MNC that had more than 25,000 employees (42%) with only five companies employing less than 1,000 employees. More than four out of five respondent companies (83%) operated in excess of 10 countries and sent their assignees to at least five countries (89%). 42% had expatriates in more than 25 countries. Three quarter of companies (76%) had highly integrated GM approaches. There was a very broad representation of industries. The range of global work forms was very broad and had shifted to some extent in comparison to earlier years. In our sample, one in five companies had more than 500 business travellers which constituted a substantial increase.

Figure 3.1 For each of the following assignment types, what is the global assignee population of your organization?



The survey also showed that of the GM functions reporting into HR, 'Reward' was the main home at 52% with 'general HR' the next highest at 26%. There seems to be an enduring lack of strategic positioning as outlined in earlier RES Forum Reports (2014, 2015). In fact, less than one in five GM professionals responding to the survey worked as an HR business partner (19%), with a third being managed by HR Business Partners (HRBPs) (28%), and two fifths cooperating with HRBPs (42%). While this constitutes an improvement on earlier years, this seems to be far from where GM professionals aspire to be in terms of importance and strategic impact

(RES Forum, 2015). Chapter 1 on agile GM functions and their work in this report gives more insights and offers a range of thoughts as to the future of GM.

What the Experts say

“Wherever GM resides (be it within HR, Compensation & Benefits, Indirect Procurement, Travel, etc.), there needs to be very close collaboration between various functional groups and key stakeholders, such as HR (HRBP’s with lines to the individual businesses), Talent Acquisition/Management, Compensation & Benefits, Finance, and Payroll, just to name a few. Having a clear understanding of the GM policies and their impact or application to each of these areas is critical, not only for consistent programme delivery (necessary for cost control), but for visibility into the effectiveness (e.g. ROI) of the programme. Without this cross-functional

collaboration, quite often, the disconnects will make it much more difficult to align the objectives of the GM programme with the needs of the individual businesses and overall organization. Having a Global Programme Compliance and Governance group can help drive strategic initiatives with key programme participants and stakeholders while ensuring a globally adopted programme.”

Robert S. Eagleson

CRP, GMS, Director,
Global Network Integration
*Lexicon Relocation
Jacksonville, USA*

The RES Forum Annual Reports in recent years have shown that MNCs value quality and risk reduction in compliance, normally prioritizing these above cost savings. These insights can be extended to various areas of compliance (personal and corporate tax, immigration, social security) that often constitute a reason to engage outsourcing providers. This year the RES Forum Annual Report concentrates on challenges arising for GM departments.

What the Experts say

“With the majority of the respondents’ GM functions reporting into Rewards, it is likely that this reflects the organizational design of most companies, whereby subject matter experts and centres of excellence sit within a specialist function such as Reward. In most organizations the number of international assignees, and in more recent years short term business travellers, makes up a small population of total employees and therefore it is unlikely to deserve a stand-alone function in the HR space. Where the GM function is situated is perhaps secondary to the

value adding capabilities of the function and to ensuring that GM is engaged as a strategic partner in the deployment of international assignees. This is particularly important given the significant costs associated with international assignments.”

Roy Fu

Regional Head of
Global Mobility - Asia
*HSBC
Hong Kong*

Outsourcing Activities and Challenges

Almost three quarters of MNCs conducted their GM work predominantly in-house (72%) while the remainder predominantly outsourced it. It is popular to execute GM work through one global HR service centre (60%) with local (14%) and regional (19%) management being far less common. A fifth of those companies which operate an insourced GM approach are currently reviewing or planning to move to an outsourcing model (20%), a further 15% would consider this for the future with an additional 8% having already started work on this. Thus, the trend to outsourcing seems to continue unabated. Amongst those that already predominantly outsource, multi-vendor models (52%) are common. Companies stated that they chose this approach to support assignees better (52%), to retain in-house control of the overall mobility programme (52%) or to ensure maximal cost savings (45%).

What the Experts say

“When considering whether or not an outsourcing decision should be made, the team’s priorities and objectives should be identified clearly in the first instance. In the situation whereby an outsourcing decision has been made, the choice of vendor during the procurement and RFP process should help identify the best fit vendor that reflects the team’s priorities and objectives. Once the new vendor has been put into place, the on-going vendor management process is key to ensuring the vendor and the GM team’s objectives are

aligned. Without defining the priorities and without a robust procurement process, the chances of a successful outsourcing process are reduced significantly. Given the opportunity cost of failure, it is worth investing in the preliminary steps.”

Roy Fu
Regional Head of
Global Mobility - Asia
HSBC
Hong Kong

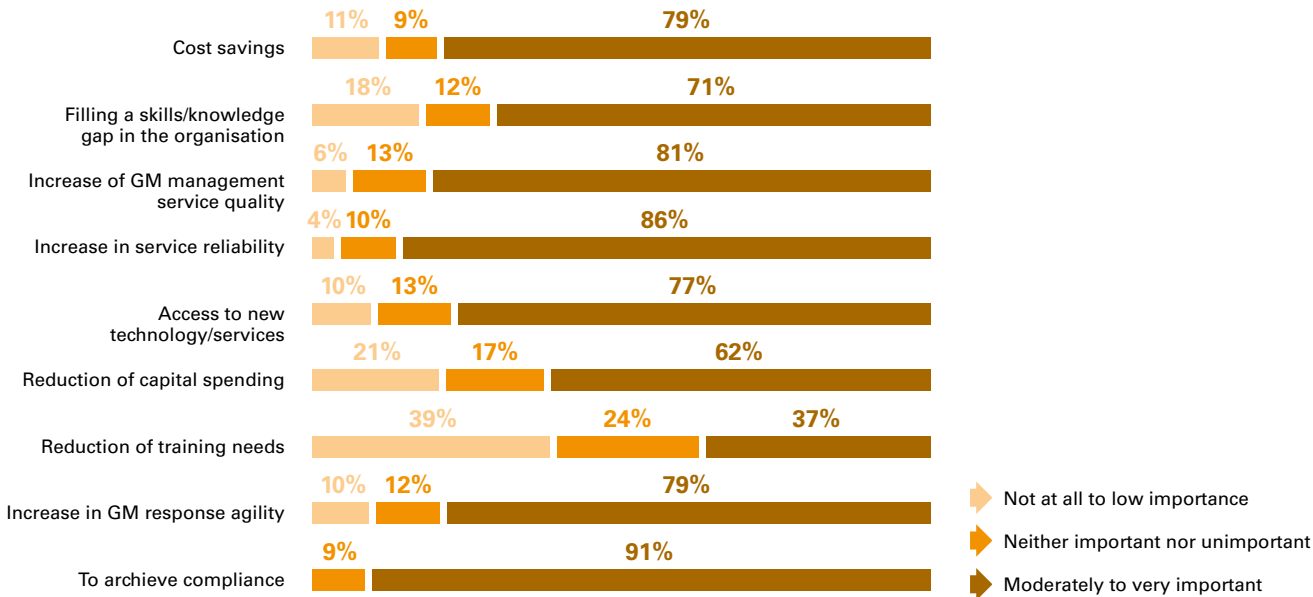
Overall, while there is undoubtedly much expertise in-house, essentially all MNCs were prone to outsource some GM elements (see Figure 3.2). These GM elements included household goods shipment (98%), destination services such as home and/or school search (94%), tax services provision (94%), immigration service provision (78%), language lessons (76%), intercultural training (72%) and many more activities. Least prominent to outsource were compensation package preparation (11%), expatriate payroll services (17%) and cost estimate preparation (24%), which is not surprising as most of the necessary data is at hand in the company.

Figure 3.2 If your programme is managed in-house (insourced) which of the following services do you outsource?



What drives companies to use outsource activities to external providers? The reasons have traditionally been related to costs, quality, flexibility and reliability. They are presented in more detail in Figure 3.3 below.

Figure 3.3 How important are the following factors in your decision to use outsourcing providers?



As in earlier years, the most important reason to use external service providers is compliance (91%), followed by an increase in service reliability (86%), an increase in GM service management quality (81%), cost savings (79%) and GM agility (79%). Thus, there is a strong desire to increase GM programme management quality, expressed through compliance, reliability, quality, agility and costs. These should be the yardsticks of how to assess outsourcing providers and their services.

Global Mobility through the Looking Glass - RES Forum Member responses to: "What works well and what does not?"

What works well in the areas that you manage in-house?

"Service levels improve when insourced"

"In-house accountability and speed of delivery improves"

"Leveraging in-house expertise and equality"

"Flexibility and level of direct engagement with assignees and managers"

"The pre-planning and strategy is done in-house directly with the business and all policies and processes are managed in-house. That works well to make GM a more strategic partner and not seen only as operational"

"In-house: personal touch"

"With a small programme in-house works well"

"Global Mobility is aligned with our talent strategy; by managing the assignments in-house, including determination of the type of assignment and terms and conditions, the compensation methodology, etc., we are better positioned to act as internal consultants to the business"

In-house service provision is good for service levels, flexibility, personal touch and strategic positioning of the GM department.

What does not work well in the areas that you manage in-house?

"In-house compliance with policies"

"Our assignments are highly individualized – consumes lots of time"

"Cost estimates – we are inconsistent in how we do this perhaps because we support different businesses within our organization"

"In-house – as part of the assignment management process the cost allocation discussions can be protracted"

"We struggle with lack of resources and knowledge regionally to support the in-house elements of the programme"

"Too many decision makers and nobody really taking responsibility"

"Still trying to work towards a Centre of Excellence model"

In-house challenges predominantly consist of resource bottlenecks, compliance issues of line management and assignees, lack of expert and local knowledge, internal power, ownership and decision responsibilities.

What works well in the areas that you outsource within your own programme?

- "Heavy lifting of relocation, tax filing, etc."
- "Outsource: [access to] wider network of contacts and market intelligence"
- "Outsource: tax, immigration, social security compliance"
- "Outsource transaction execution"
- "Outsource to achieve compliance"
- "For what we outsource we enjoy the consistency of service and outcomes"
- "Outsource intercultural and language training"
- "We have strategic activities in-house. We outsource specific components to immigration attorneys, income tax providers and relocation service providers"
- "The vendors who provide shipping, destination services and other services like this are great at managing those items so our team can work on other things. They are experts in those areas so we do not need to be."
- "Challenge is that, internally, we do not really have any one dedicated GM person."

Outsourcing is good for specialized and expert knowledge, service consistency, transaction execution and access to wider market intelligence and networks. In addition, outsourcing is appropriate where there is an internal lack of resources.

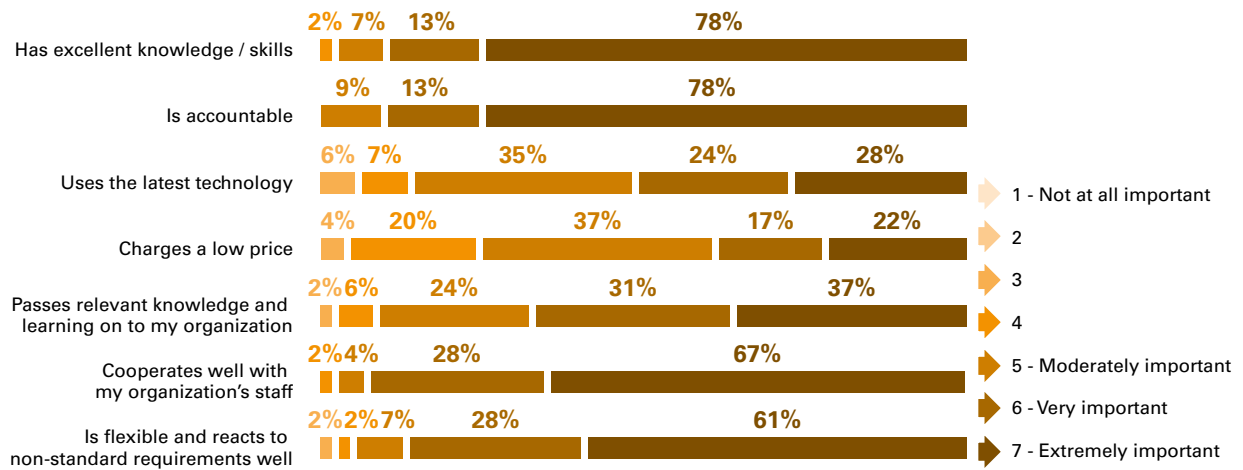
What does not work well in the areas that you outsource within your own programme?

- "For outsourcing to work you need to ensure service levels and that the relo counsellors are being proactive"
- "Lack of communication can be an issue"
- "Outsourcing challenges – data sharing across borders in a consistent format for tax compliance. Data output is often influenced by payroll software"
- "Destination services can be hit or miss dependent on location"
- "Reconciling tax at end of year can be challenging. Never straight forward"
- "Our provider will always try to up-sell solutions which can be painful, especially as we would like the base service to be working effectively"
- "Outsource, finding the right partners who are willing to go with the ups and downs and still provide great service and be there for the long term"
- "Outsourced – process improvement proposals"
- "Not all vendors have well established knowledge of our business"
- "Multi-vendor management is a challenge as the expectations provided by the vendors differ vastly"
- "... I would have expected some process and template development from vendor side, based on the given feedback, or updated templates, which has not really happened"

Challenges include cooperation with vendors – especially when there are more than one – communication and data sharing. Other problems include sub-optimal process improvements with the vendor, challenges in the interaction between the parties and within one's own company base which could profit from vendor expertise and help.

It is one thing to establish a service level agreement for outsourcing, but another to manage the vendor relationship over time. The RES Forum survey also explored how important certain characteristics were during an outsourcing relationship.

Figure 3.4 During your outsourcing relationship, how important are the following characteristics?



This data confirmed the general thrust of the statements in that it was extremely important during an outsourcing relationship that the vendor displayed excellent knowledge and skills (78%) as well as continued to be accountable (78%). Cooperation with internal staff (67%) and flexibility to react to non-standard requirements (61%) were also extremely important.

What the Experts say

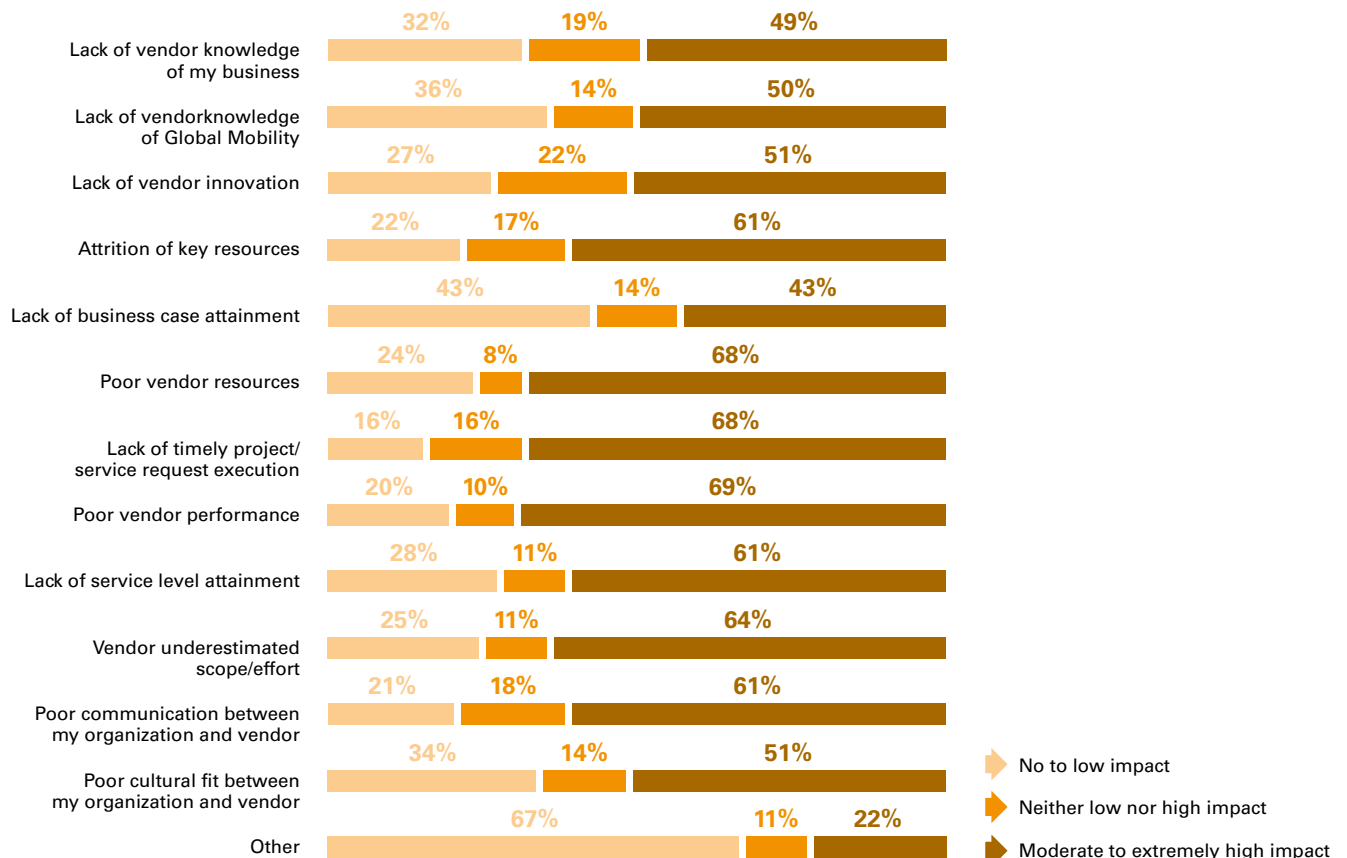
“In my experience, the characteristics that help make a vendor partner stand out from the crowd can be summed up by the 3 ‘A’s’ – ability, availability and affability. A partner who is confident enough and invests the time to get to know the specific priorities and challenges of their Global Mobility stakeholder

will position themselves as a true collaborative resource, and an extension of the Global Mobility function.”

Jose Segade
Co-founder
The RES Forum
London, UK

Occasionally, things go wrong in the outsourcing relationship. The RES Forum wanted to understand the size of the impact if things ‘went pear-shaped’. Based on the insights of early annual reports we constructed a list of areas which can be problematic and asked the survey respondents for their opinions.

Figure 3.5 Reasons to be dissatisfied



The key problem areas, each with more than 60% responses, were; poor vendor performance overall, poor vendor resources, lack of time project/service request execution, attrition of key resources (at the vendor site) and poor communication between the organization and the vendor.

What the Experts say

“From our perspective, a vendor should be an extension of your organization; not just a service that is purchased. How they fit into your culture, and how you work with, and treat each other, are equally as important as the services they deliver. Creating mutually beneficial relationships, combined with rigorous standards and oversight, will make your network and programme stronger;

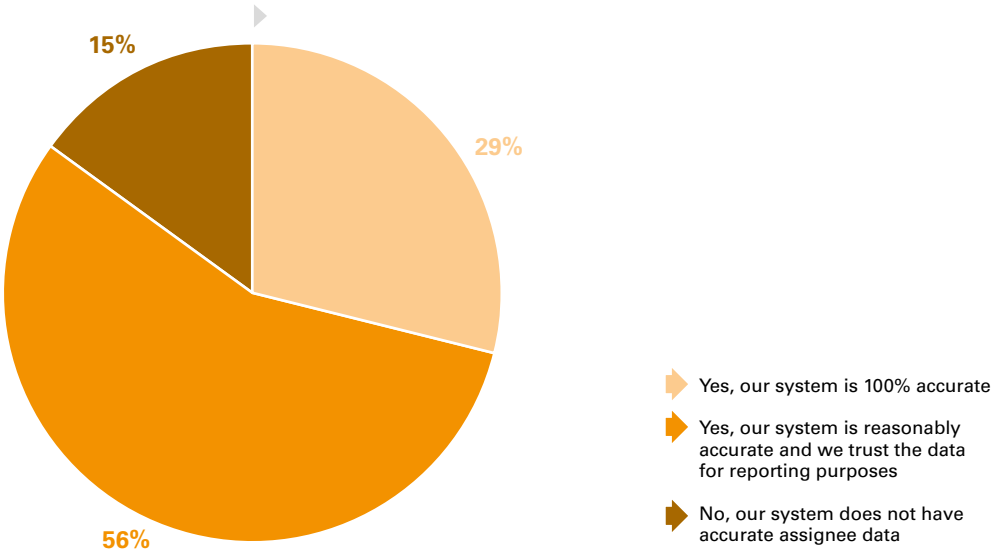
giving you the ability to offer best-in-class solutions to your employees anywhere in the world.”

Robert S. Eagleson
 CRP, GMS, Director,
 Global Network Integration
Lexicon Relocation
 Jacksonville, USA

Assignee and Business Traveller Tracking and Management

Where MNCs have a mobility Centre of Excellence, it is highly likely that it works on GM policy writing and management (97%), global vendor management (88%), the management of global tax compliance (76%), assists in assignment documentation (71%) and carries out assignee tracking and management (68%). The latter, however, often still relies on the use of Excel spread sheets (44%) which the RES Forum has lamented in earlier years. Only 17% of companies track assignees in-house using an externally sourced assignee management software tool and 13% have developed their own in-house expatriate software tool. An equal percentage (13%) has outsourced assignee tracking, often using Equus AssignmentPro. As in earlier years, only a minority of tracking software is fully interactive and can share data (12%).

Figure 3.6 Using the assignee tracking tools available to you within your organization, do you have a clear picture at all times of the exact assignee population, including locations of all assignees?



Surprisingly, in comparison to our data from 2016, the accuracy of assignee tracking has not improved. 15% of MNCs state that their system does not deliver accurate assignee data which exposes these firms to compliance risks. One explanation for this apparent step backwards is that the awareness of GM professionals to the tracking risks involved in cross-border commuting, extended business trips and other forms of non-traditional work abroad has probably increased over the last five years. In addition, respondents have been acutely aware of human error and the limits of Excel sheets/manual data collection. Again, we note a lack in the use of intelligent GM systems. Moreover, we believe that there is the possibility to unearth massive efficiency effects within GM information systems in the future.

What the Experts say

“The primary challenge I have seen with effectively tracking business travellers is the lack of a central “owner” of this population. For many organizations, due to size, volume and structure, it is simply not possible to centralize this function. To do so often requires the combined approach of a technology solution along with collaboration between various functional groups such as Global Mobility, Travel, Expense Management, etc. For example, travel management provider data can be used in

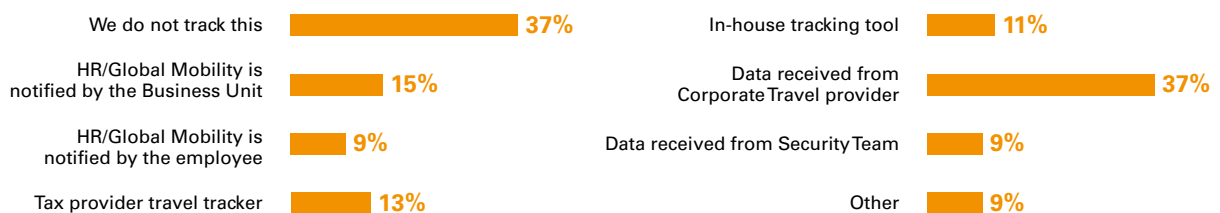
conjunction with tracking software to identify potential (or actual) risks. Alerts can then be sent to various functional groups such as Tax, Immigration, Security, and/or Global Mobility. While there are solutions available, the primary difficulty for many organizations is how the solution is administered and by whom.”

Robert S. Eagleson

CRP, GMS, Director,
Global Network Integration
Lexicon Relocation
Jacksonville, USA

Extended business travel is argued to have substantially increased in recent years. Already in 2006, Welch and Worm argue that business travel has become an essential component of global work. Business travellers may travel to a large number of different countries and have to adjust to various national and local cultures and contexts (Baruch et al., 2013). How do firms track business travellers in order not to fall foul of national legislation? They have a range of internal and external choices stretching from data provided by corporate travel agencies, security teams or internal sources. The data is provided in Figure 3.7. What is most interesting is that more than a third of companies do not track business travellers, again exposing themselves to potential compliance risks. Flawless programme management is likely to look very different.

Figure 3.7 What methods do you use to track regular business visitor activity?



Data from this and other surveys (see ‘Key Challenges in Assignment Compliance’) indicates that MNCs find it especially difficult to track extended business travel and that they feel vulnerable to compliance problems in relation to this form of global work. In order to strengthen the flawless execution of GM programme management, it is necessary to strengthen the compliance for alternative forms of international work, especially including business travellers.

What the Experts say

“The growth of Frequent Business Traveller (FBT) activity is representative of a perhaps less traditional, more flexible form of mobility. Tracking is a key activity related to this, but it is how this data is used taking into account Corporate tax, personal tax, payroll and immigration requirements, where the fun really begins! The management of FBTs continues to offer different challenges to Global Mobility

depending on the internal characteristics of the organization, but one thing remains consistent across the piece – the challenge of coordinating FBT related requirements across multiple functions.”

Jose Segade
Co-founder
The RES Forum
London, UK

Key Challenges in Assignment Compliance

With the aim of understanding the on-going challenges in assignment compliance, we repeated an exercise that we have undertaken for the last two years. We asked MNCs to qualitatively outline the key problems that they encounter in ensuring assignment compliance, and we received responses from 43 companies. The following key compliance challenges emerged:

1. Managing and Tracking Assignees and International Business Travellers

- “Immigration – due to the volume of business travellers”
- “Host tax exposure for stealth expatriates”
- “Business travellers and assignee tracking and reporting”
- “Ensuring compliance for business travellers”

2. Accuracy of Data/Software and IT Issues/Other Issues

- “No tracking system, so no full overview on compliance”
- “Data sharing across borders in globally consistent format, e.g. payroll and benefits data for tax reporting”
- “Would like to have one system that tracked all aspects of the employee’s transfer”
- “Many country combinations. Frequently changing rules. Process of compliance far too complicated”

3. Role and Ownership of GM Processes

- “Management buy-in”
- “Lack of ownership at senior level”
- “Acceptance of business and employees that their movement will need to be tracked”
- “Leader and manager education that employees cannot be sent to other countries to work without proper immigration and tax investigations”

Overall, there has been a strong shift away from concerns about the business culture and towards a range of tracking issues. There were many more comments regarding the tracking of global workers, a distant second being software issues.

The BREXIT Impact on Programme Management and Compliance

The Economist charted the topics that were most read and reported during the last year (The Economist, 2017). There is little surprise that Britain's decision to leave the European Union (Brexit) was amongst the most covered topics worldwide in 2017. It devoted substantial space to discussing survey findings about GM professionals' assessments of the impact of the Brexit decision. At the time of writing this report, the political, social and economic implications are still not clear and immigration rules and regulations have not been formulated for the post-Brexit era. While this is clearly acknowledged by the GM professionals answering our survey, we wanted to understand what they thought was the impact of the Brexit decision on the GM work within their own organizations. The majority of the 39 experts voiced a persuasion that Brexit will increase compliance related needs and complexity which, in turn, would create the need to have a robust approach to how these are managed. Many perceived a degree of insecurity in regard to immigration and social security and a few argued that there would be a reduced number of inbound assignments to the UK. A small number of respondents felt that Brexit "may force us to consider alternate locations to expand our business in the future" and that there may be a "reduced local employee and assignee population in the UK." One respondent argued that the "greater complexity around immigration will strengthen the case for a competent outsourcing provider" and one saw advantages in a depreciating British currency.

The Quality of Outsourcing Providers

Each year we ask companies whether they would recommend an outsourcing service provider (and if yes, which). GM experts frequently recommend immigration service providers (80%), tax service providers (75%), household goods shipping companies (65%) and destination service programme providers (60%).

It is clear that the perceived quality of service provision that outsourcing providers deliver can vary from year to year and that particular companies seem to be especially good in some key outsourcing areas. In addition, situation and team factors are likely to have an impact on the service quality. Over the years that the RES Forum has surveyed its members, it has become clear that most MNCs seek quality of services, flexibility in cooperation and error-free compliance over cost. Thus, flawless programme design will seek to manage the vendor relationships bearing these factors in mind.

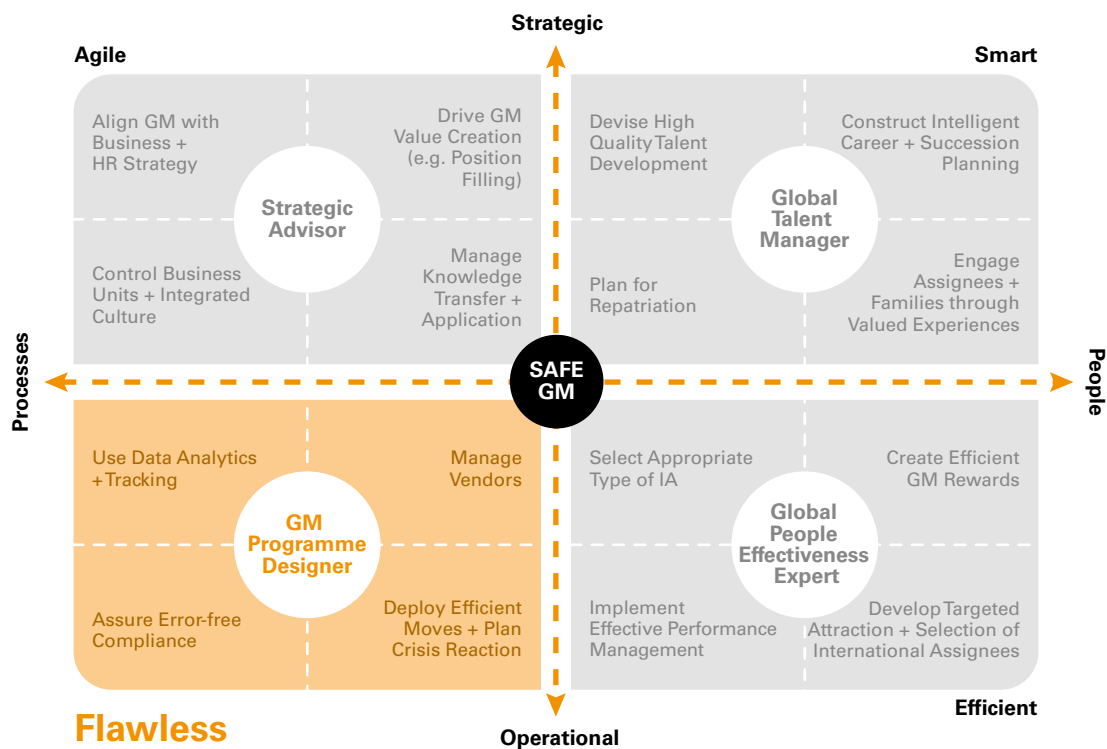


Conclusions and Learning Points

One could argue that in a world that is volatile, uncertain, complex and ambiguous (VUCA), the legal and regulatory context is permanently shifting and that hostile environments and market movements require GM departments and their policies and practices to shift, flex and adapt. Hence, complete error-free and optimal GM approaches are not possible.

Nevertheless, organizations strive to improve their GM approaches in order to fulfil their SAFE GM objectives. These consist of smart global talent management, agile strategic advice to HR and senior line management, in-depth people effectiveness knowledge that enables efficient GM and flawless compliance. Figure 3.8 gives an overview of SAFE Roles of Global Mobility that aim for purpose, a growth experience and GM value. The GM Programme Designer role seeks to make cross-border moves highly effective and compliance error-free. For this it may have developed high quality operational approaches. MNCs are most likely to also use outsourcing providers so that tight vendor management is necessary. Sophisticated data analytics that goes beyond mere assignee tracking to also provide relevant data in order to take better informed GM decisions, is likely to improve GM programme management over time. Lastly, in case of humanitarian or natural disasters and crisis situations, it is important to have emergency plans in place.

Figure 3.8 SAFE Roles of GM: Flawless Programme Management



The challenges identified in this chapter and the implicit learning points lead us to suggest that, for many companies, certain activities and approaches would be useful in optimizing their programme management. Organizations should aim to:

- ▶ Strengthen the GM department's position and influence in order to have suitable and sufficient decision-making power in relation to negotiations and contracting with outsourcing providers, assignees and line managers.
- ▶ Strengthen in-house service provision where appropriate. This can improve service levels and service speeds, flexibility and can often provide a superior personal touch. In addition, this may support the strategic positioning of the GM department.
- ▶ Strengthen the outsourcing vendor selection process to take account of the organization's key interests. Overall, these include the need to access up to date local and international knowledge and skills, high levels of vendor accountability, an extensive willingness to cooperate with own staff, a large vendor resource base, rapid implementation capabilities and a high degree of flexibility to react to non-standard requirements.
- ▶ Consider the use of a multi-vendor approach in order to maintain overall control, to seek cost efficiencies and to have the ability to choose best in class.
- ▶ Use selective outsourcing in order to avoid resource bottlenecks and to balance the lack of expert and local knowledge where necessary.
- ▶ Use selective outsourcing to overcome compliance issues with line managers and assignees and to clarify process structures, ownership and decision responsibilities.
- ▶ Use selective outsourcing to gain access to local and international expert and service networks and wider market intelligence which can help to shape strategic and operational GM.
- ▶ Consider using outsourcing providers in the areas of household goods shipment, immigration provision, destination service programmes and tax services provision as MNCs often recommend these because of their high quality of work.
- ▶ Strengthen the management of vendor relationships to encourage better cooperation levels, more extensive data sharing and to implement process improvements (within your own organization as well as within the outsourcing provider).
- ▶ Strengthen assignee tracking approaches, including the tracking of (extended) business travellers and cross-border commuters in order to improve legal, tax and social security compliance.

Flawless programme management and compliance is obviously a stretch goal for many MNCs. While this ideal is not readily achievable, any progress must be welcome both for global assignees and their employers.

Main Survey Data Source: RES Forum Survey - Programme Management and Compliance, November 2017, 54 responses



North America, United States
New York

Brexit, back to hard borders in Europe?



Expert view by Harmony Relocation Network
Paul Bernardt
Managing Director



Whilst Brexit as a concept was 2016 and 2017's news, the UK and EU now move into the hard reality of what it will mean in practice and one of the main sticking points is the introduction (or not) of so called hard borders between the United Kingdom of Great Britain and Northern Ireland and the EU, specifically the border between Northern Ireland and the Republic of Ireland.

We probably all hoped that by now we would have more clarity about the direction Brexit negotiations would take with regard to the border issue, but unfortunately, other than a principal agreement on the border between Ireland and Northern-Ireland (which in itself is still in question), as I write this in March 2018, there is very little to hold on to. There is a great political sensitivity around the Irish/Northern Irish border, but from a transportation perspective, the biggest issue is not so much the trade between Ireland and the UK, but more the trade between the UK and continental Europe.

The uncertainty means that there are a variety of scenarios still possible, so I have taken the opportunity to take a broader view on trade and customs and a view on hard borders. If I were a policy maker, these are the things that I might consider.

So how (and why) did we achieve the current status quo of an open market for transportation without borders and what could this mean for the future?

In the Treaty of Rome, 1957, Transportation was recognized as vital for further European integration, and crucial for the creation of the internal market. Transportation was in fact one of the first common policies, and is of course required for the free movement of individuals, services and goods. The treaty of Rome however, did not define the substance of a common transport policy, meaning that Member States had to agree how to formulate one. Progress in doing this was very slow until the 1980s.

In fact, the European Parliament took the Council of the European Union to the European Court of Justice, because it failed to develop a common transport policy. So in 1985, after 28 years, there was some progress to develop that common transportation policy.

Up until this point, there was a very complex set of multilateral or bilateral agreements in place between countries. Countries negotiated on an annual basis between each other to what extent they would allow free movement of (the weight of) goods between countries, or they would negotiate certain quotas based on the number of movements (of trucks, trains, barges etc..). And every year, after completion of these bilateral agreements, each country had to allocate these transportation rights among the carriers in their own country. The costs and bureaucracy of managing such a process were significant!

Additionally, where the countries in question were not neighbouring countries (for example Germany and Spain), the agreements had to include permits for passage through additional countries, and if this passage was not included in a general bilateral agreement, approval had to be given for each trip or for a certain period of time. No wonder there was strong support among the EU nations for a common transportation policy!

This set of strict rules concerning which transportation companies could carry what and where existed despite the fact that other EU treaties dictated that discrimination based on the nationality of the carrier was illegal among EU member states; the different treaties were in fact in conflict with one another!

The EU wanted to eliminate such discrimination and therefore pushed for the termination of the bilateral and multilateral agreements by adopting a common transport policy. However, governments were not very cooperative in giving up control over their national transport networks, and there were major differences between the regulatory and transport structures in each country that needed to be harmonized, which was not easy. Large countries that had been strictly regulated, such as France and Germany, were afraid that deregulation would favour carriers of countries that were less regulated already, such as the Netherlands and Belgium. Additionally, these larger countries were concerned that a large proportion of market share would be captured by carriers from countries with lower labour costs, which at the time were Portugal and Spain (though now with the entry of Eastern European countries offering lower labour costs, today these have become very dominant in Europe).

Ultimately, the deregulation has led to more outsourcing of transport to specialized companies, rather than in-house trucking by the producers of the goods. The economies of scale are obvious if you can service the entire European market, rather than be bound by all sorts of bilateral agreements, and as a consequence deregulation has lowered costs for the end user considerably.

The growth of the transportation market has not been without problems, so the EU continues to work hard on investment into infrastructure bottlenecks, safety regulations (such as minimum rest periods), environmental laws etc. Now, the obvious positive impact of the open transport market is that lengthy border controls no longer exist, restrictions on cross-trade no longer exist, and prohibition of cabotage (defined as transport within a member state that is performed by a carrier registered in a different country) no longer exists.

As a result, transportation companies now have a much better vehicle utilization, and lower transport costs.

The fear exists for all UK and European transportation companies alike, that we may go back to a system with hard borders, customs checks, trucks standing in line, empty return mileage, negative environmental impact, bureaucracy, and consequential cost for tax-payers on both sides; things which are all quite unthinkable! The main problem is that if transport stands still or is slow, or has too many bottlenecks, it has an inevitable impact on the entire supply chain, with cost increases for waiting times, the need to keep larger safety supplies for production, bureaucracy and general admin costs and so on. For Global Mobility we would foresee a cost increase due to longer transit times, more paperwork, and all sorts of relocation related expenses such as per diem charges. This could mean an increase of between 15 and 20% of today's costs.

So, my recommendation to policy makers is to ensure that they understand the impact it would have on both sides if we return to a system of hard borders, a situation I think we must avoid at all costs.

About Harmony Relocation Network

Harmony is a global network of locally owned relocation companies, upholding strong family values through generations of heritage. We are a network of committed partners, brought together in one truly global and solid infrastructure with cutting edge technology, an ISO-tested quality system and leading sustainability criteria. Our network (founded in 1992) consists of over 140 members in 60 countries, serving 180 countries across 6 continents, providing the same level of high quality services, local expertise and personal commitment. All our members are co-owners of Harmony Relocation Network.

www.harmonyrelo.com

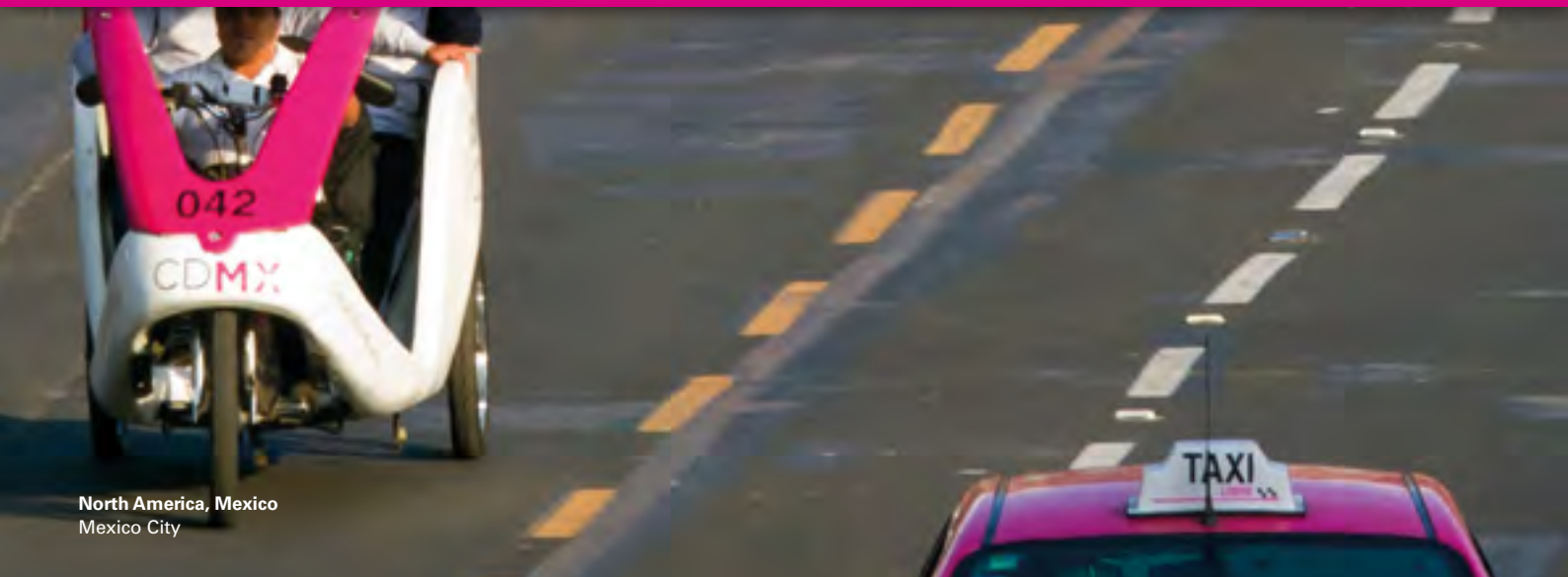


North America, United States
Colorado (Rocky Mountains)



Efficient Reward Package Design

by Professor Michael F. Dickmann



North America, Mexico
Mexico City



Chapter introduction by: David Enser, Co-founder, The RES Forum

Cross border reward remains for me a fascinating topic. There is a clear trend towards further segmentation of target sub-groups, as this chapter will demonstrate, with organizations taking a broader view of what constitutes reward to these groups. Of course, there is appropriate salary, benefits and support dependent on seniority, country of origin and degree of hardship of the host location. At the same time, being sent overseas, the offer of a stretch opportunity in a different country, may also be viewed as a different kind of reward. Once the reward objectives in terms of value are met of course, there comes the question of efficiency – recent observations by the RES Forum indicate a trend towards an increasing willingness to look at more flexible forms of pay delivery & assignment structuring, both to optimize tax exposure to employee and employer but also to ensure practicality and convenience for both sides. Where in the past simplicity was demanded and expected, recent leaps in digital capabilities and subsequent reduction of administrative burden enable reward packages to be much more flexibly delivered in home, host or even off shore in some circumstances.

Linked to the subject of efficiency, there are of course other, non-traditional forms of assignment which become increasingly prevalent and of course present us as HR practitioners with lots of challenging questions – the likes of the Commuter arrangements, foreign local hires (i.e. contract in country of employment but centre of vital interest in another) and those with multi-responsibility and / or global roles. Conceivably these individuals do not actually ever ‘move’ yet the nature of their work, and the complexity around determining beneficiaries of their work and thus right to taxation, means that their reward and the reporting of such must be closely managed. Finally, there is the fascinating matter of mutuality – a two-way contract determines expectations on both sides. Of course, the employer is expected to offer a package that is fair, transparent, achievable, supportive in all the right places based on circumstances and, as mentioned, delivered in a way that makes sense to all parties. However, in return, the question of performance comes into play. A personal view of mine is that too few organizations think in the long term when setting goals for international assignees. Of course there is the short term performance cycle, which increasingly varies between 3 and 12 months depending on organization. However, what of the long term goals measurable over the full assignment duration? Embedding a culture, up-skilling individuals or teams, identifying a successor? These goals do not fit easily into a regular cadence of performance reviews yet many organizations would surely benefit from finding a way to incorporate such targets into assignment planning and, of course, establishing a link between them and overall reward. I hope you enjoy this chapter as much as I did.



Efficient Reward Package Design

by Professor Michael F. Dickmann

Introduction

Reward approaches seek to augment the attractiveness of international assignments. Moreover, they seek to compensate assignees for some of the adverse effects of global relocations. However, since 2008, the financial climate has become harsher and organizations seek to reduce relocation costs and to fine tune expatriate rewards. While earlier assessments of Global Mobility (GM) costs indicated that expatriates cost their organizations about three to four times more than their non-expatriated peers, more recent measures indicate that this expatriate premium has reduced to about two times (Doherty and Dickmann, 2012).

Organizations are obviously now targeting a lean reward package design. 'Lean' in manufacturing is a systematic method for waste minimization without reducing productivity. The 'waste' in GM rewards is that assignees are compensated (much) more than is necessary to attract them to work abroad and to motivate them to exert the effort that is needed for their position and responsibilities. In addition, multinational corporations (MNCs) would want to find a way to motivate people and incentivize the right behaviours. MNCs strive to be efficient in their reward package designs, which means they should also explore and exploit the full array of non-financial rewards. It is often the non-financial rewards such as career opportunities, an attractive psychological contract, including development and meaning in work, that generate a commitment to a organization that makes people go above and beyond their contractually outlined duties (Conway and Briner, 2005). It is therefore important to understand the diverse target groups of globally mobile employees as well as to design tailored approaches that appeal to them. Most often, this is undertaken by GM departments distinguishing different forms of working abroad such as short term, long term and local plus assignees. Other approaches to enhancing the efficiency of reward systems include keeping administration flexible and efficient. In addition, contextual flexibility to react to situational changes such as currency fluctuations can be important to establish and service a global reward system that is seen by many as fair and attractive.



Key Recommendations for Efficient Global People Effectiveness

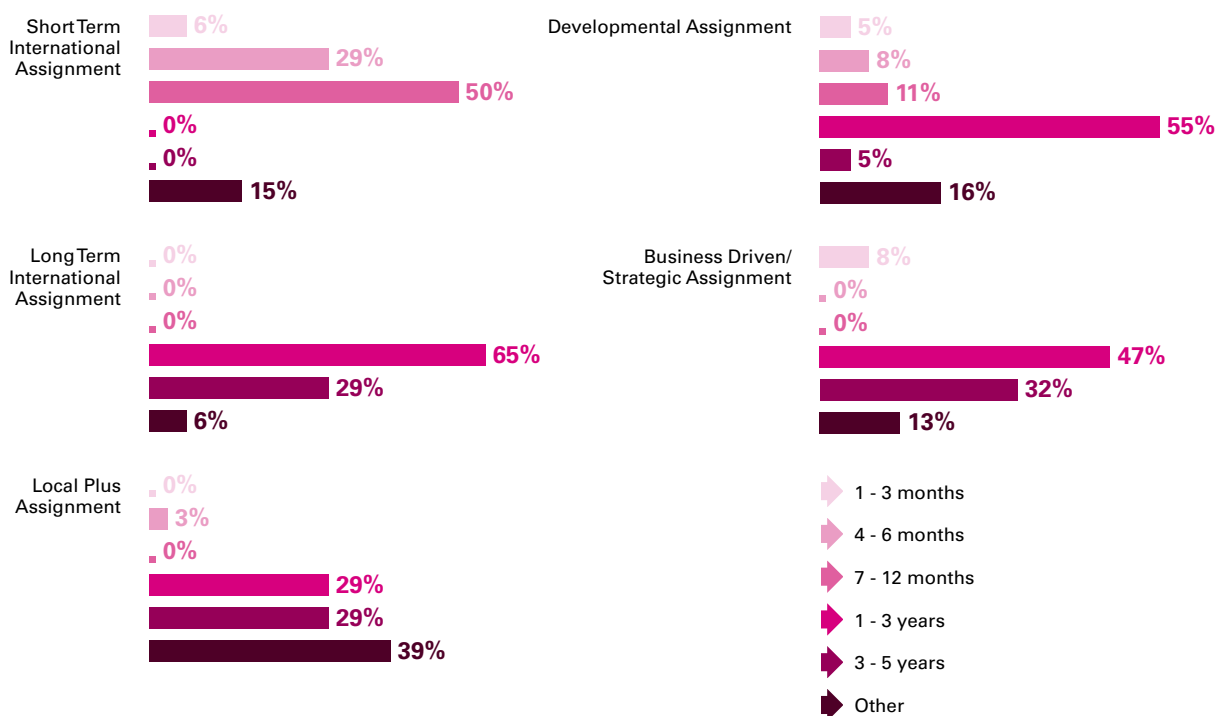
1. Distinguish assignment lengths to develop suitable rewards
2. Identify assignment types to develop suitable rewards
3. Understand assignment purposes to develop suitable rewards
4. Assess candidate supply to create adequate incentives
5. Explore the bargaining power of candidates
6. Tailor rewards to location specifics
7. Link rewards to assignment performance and objectives
8. Take account of the developmental and career interests of candidates
9. Appreciate wider interests and drivers in the negotiation process
10. Factor in the family situation when assessing which benefits to offer

Survey Background & Assignment Type Consequences

The core annual RES Forum survey looks at assignment package design in order to summarize the key trends in global rewards. This year's survey was answered by 49 large corporations. A quarter of the MNCs surveyed had more than 250 long term assignees (LTAs) and more than a fifth had more than 100 short term assignees (STAs). A quarter also had more than 100 local plus assignees (LPAs). Close to two thirds of companies that had the data available (36% did not) had more than 100 business travellers. Overall, this is a large basis of international workers to inform the discussion.

The assignment durations within the different categories can vary substantially. The RES Forum wanted to shed light on these variations as it may affect reward packages and benefits offered to assignees.

Figure 4.1 In your organization, what are the typical assignment durations for the following assignment types?



The overwhelming duration of a short term assignment is between seven and twelve months and expatriation durations of less than three months are rare (6%). This is likely to be driven by cost and administrative considerations. However, in terms of the literature on cultural adjustment (Haslberger et al., 2013; Black et al., 1991; Bhaskar-Shrinivas et al., 2005), short term assignees are likely to still struggle with culture shock around the time of their repatriation. Obviously, this will depend on individual and country circumstances with some commentators arguing that countries are becoming more alike and that culture shocks are likely to be less severe (with the exception of assignment combinations such as a 'Westerner' going to Japan. It is therefore recommended to assess the STA duration factoring in business needs, individual dispositions and location considerations.

Developmental assignments can be of varying length. Nevertheless, most organizations have them longer than one year (55% between 1-3 years and 5% longer). While development is linked to a variety of situations, there is a distinction with respect to cultural insights and adjustment. Shorter term assignments are seen as creating cultural awareness while longer-term assignments (those lasting at least two years) facilitate a deeper cultural understanding. It seems that close to a quarter of organizations (23%) aim for cultural awareness while the majority seek deep cultural understanding.

Lastly, business-driven and strategic assignments may be geared to shorter durations (possibly for trouble shooting reasons) but with 8% of these assignments lasting 1 - 3 months, this assignment objective is in reality uncommon. Business driven and strategic assignments are predominantly of at least one year duration and are likely to be seeking to fulfil goals such as control, integration or knowledge transfer (Dickmann and Baruch, 2011).

What the Experts say

“Reward in the mobility context is not a science apart from its generic reward ‘distant’ relations. Indeed, many emerging themes in this chapter provide timely reminders of what good reward management in the broad sense is all about. And it starts with the business. Business need determines the people requirement and the right reward for roles is driven by what it costs to pay for and buy that talent. Scarce talent often results in greater rewards to attract that talent. Mobility’s twist on that story is that an international business need can often only be supported from a narrower and more unique talent pool and therefore it stands to reason that assignment terms offered need to be more generous. But reward is also an engagement tool and just as we often hear about a ‘segment of one’ in marketing circles making employees

feel like their rewards are unique to them and their needs is in many ways the main aspiration. Individualized rewards, therefore, are HR’s version of the ‘segment of one’. What this chapter tells us is that customized assignment packages can also deliver the same employee engagement and retention for internationally mobile employees. Generic rewards and scalable approaches to reward seems so 1990s and mobility practitioners are invited to contemplate whether the same applies to the rewards delivered in international assignment packages.”

Andrea Piacentini
Head of Rewards,
Standard Life & Co-founder
The RES Forum
Edinburgh, UK

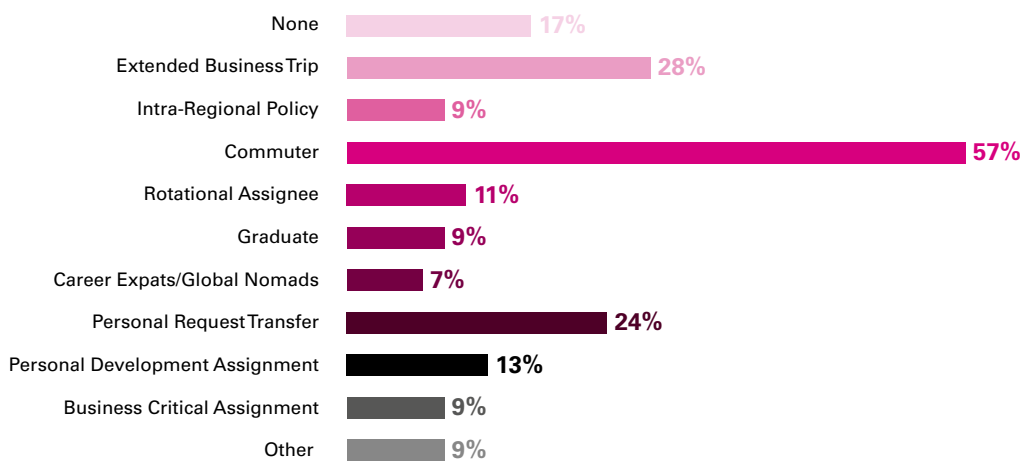


Assignment Package Design and Construction

Variety of Assignment Types

In the last two decades, MNCs have increasingly opted to recognize a variety of assignment types and to develop separate policies, or at least some variation in GM approaches. Creating a suite of assignment types and recognising the distinctive needs of those who go on assignment, and understanding the particular motivations and interests of those who would go onto these assignments can be an important step towards creating efficient reward management in the context of Global Mobility. With the exception of STAs, LTAs and LPAs, the key GM assignment types that organizations recognize in 2018 are depicted in the figure.

Figure 4.2 Does your organization formally recognize any other assignment types via separate policy guidelines?

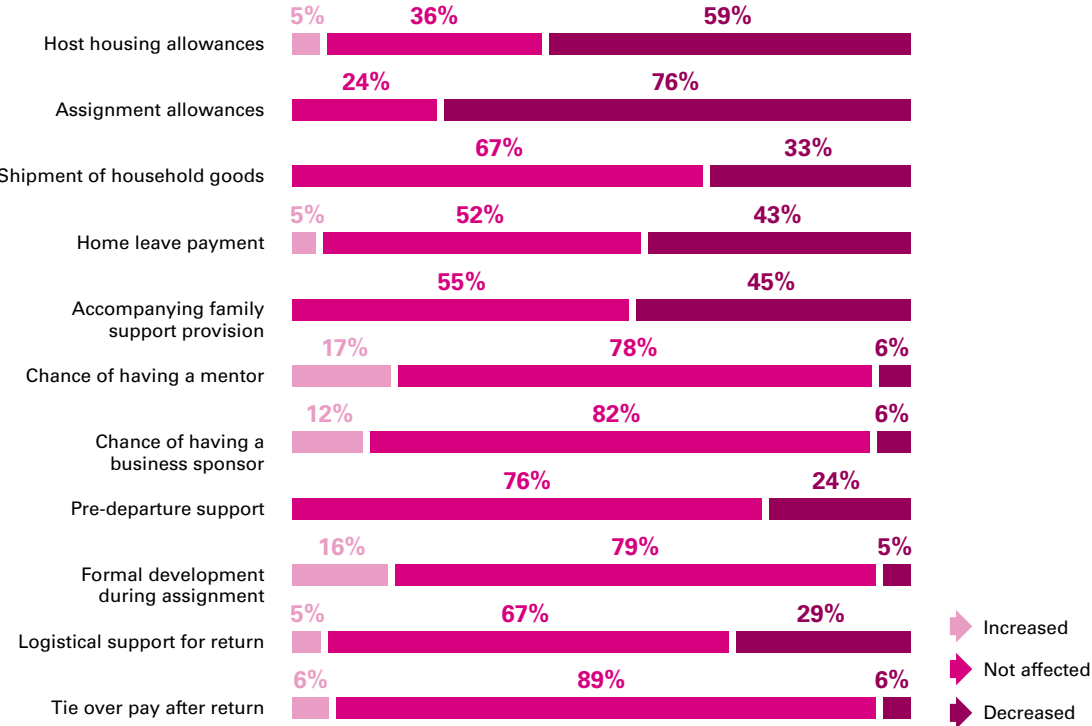


The most frequently recognized 'non-traditional' forms of global work are commuter assignments (57%), extended business trips (28%) and personal request transfers (24%). Companies develop different reward approaches to support these different assignment types and the needs of the employees transferring on the different assignment basis. Interestingly, in the case of personal request transfers some MNCs have indicated that they are less generous in offering assignment support. These personal request transfers can sometimes be secondments to different organizations due to humanitarian volunteering activities or indeed they could be an arrangement to facilitate the continued employment of a trailing expat partner. Recent research points out that strategic planning of these personal request assignments is highly important in order to increase the benefits for both the volunteer, the host organization and the long term employer of the assignee, that is to say the home country (Cardarelli et al., 2016).

Rewards for Developmental vs Business-Driven Assignments

In line with earlier years, more than two in five MNCs (42%) make a distinction between business driven/strategic assignments and developmental assignments. The data in Figure 4.3 shows clearly that, on average, developmental assignments are treated less generously in many aspects. This may be because of the age of assignees (often developmental assignees are younger), the positions and importance of business driven assignments, the demand and supply of developmental assignees (versus the relative scarcity of volunteers for business driven assignments in some companies) and the relative payback in terms of careers (see data in Chapter 2 in this report).

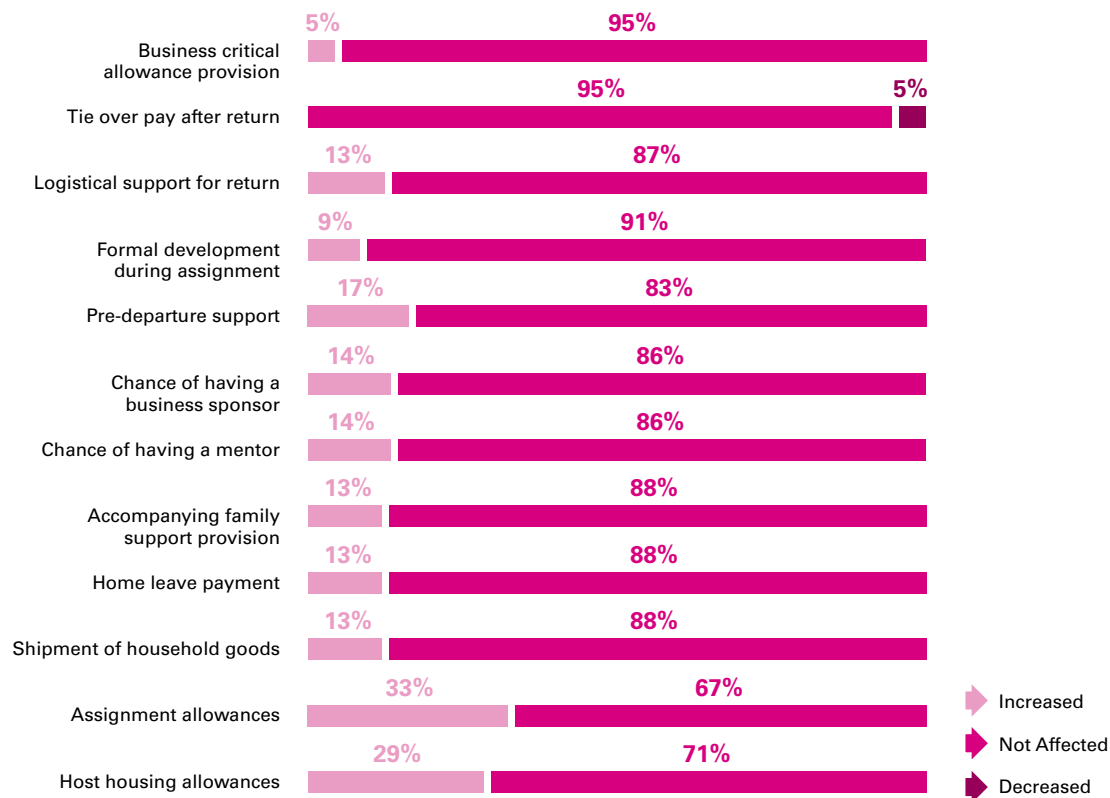
Figure 4.3 How does developmental assignment support in your organization differ from your standard long term assignment support?



This year’s picture theme of the RES Forum report is transport and while it is clear that assignees receive paid transport to their work locations, other transport implications such as return flights during the work abroad (for self and/or family) or other logistics support may depend on the assignment type. Overall, the data clearly indicates a decrease in employment benefits provided to developmental assignees when compared to standard expatriation in the areas of assignment allowances (76%), host housing allowances (59%), accompanying family support provision (45%), home leave payments (43%) and household goods shipments (33%). In turn, the chances of having a business sponsor (12%) or mentor (17%) increase when individuals go onto a developmental assignment. This data indicates that companies increasingly try to manage their GM programmes more closely, by separating out different assignment forms paired with more tailored reward and benefit packages.

Business critical and strategic assignments are treated more favourably than developmental assignments. However, in comparison to standard long term assignment support, the advantages are mainly centred around better housing allowances (29%) and improved assignment allowances (33%).

Figure 4.4 How does the business critical/strategic assignment support within your organization differ from your standard long term assignment support?

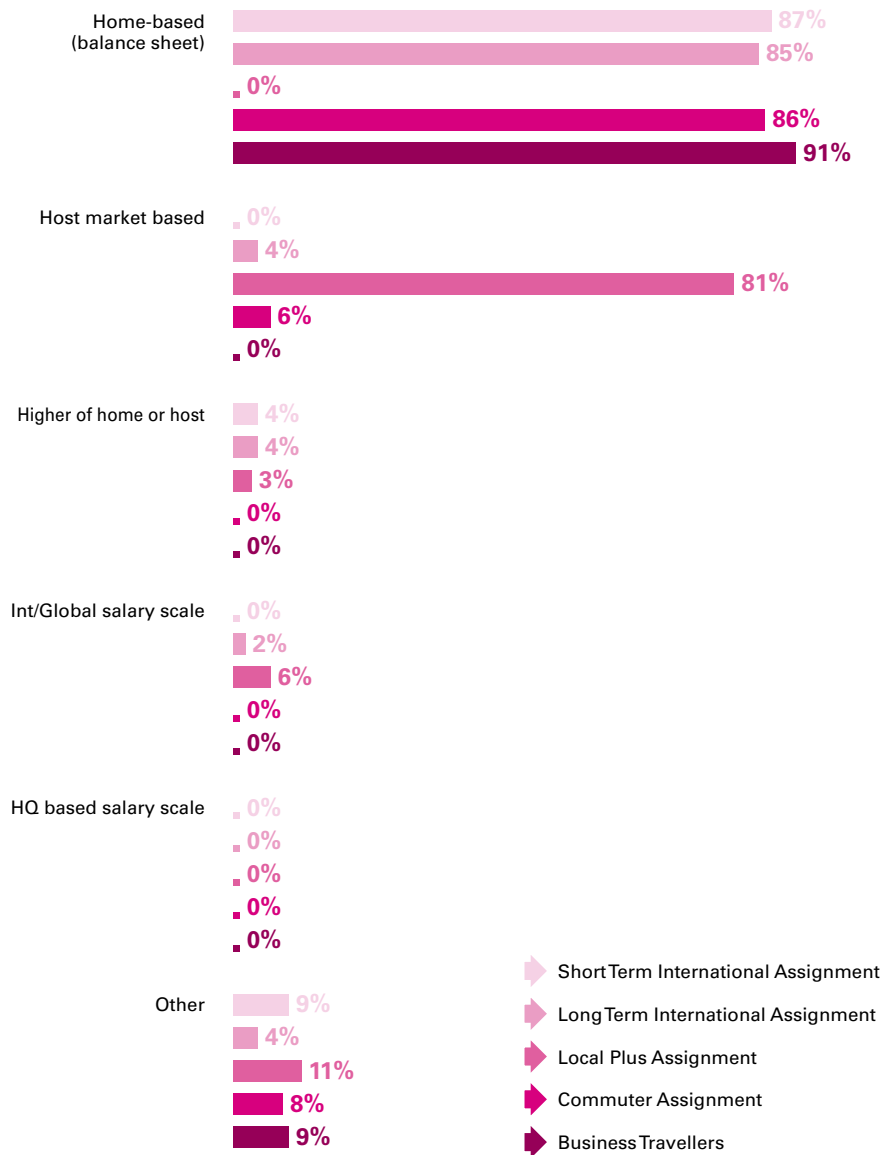


For several years, the RES Forum Annual Reports have indicated that many MNCs face the challenge of not having sufficient and highly qualified candidates for international assignments. One solution may be that organizations need to be more generous, flexible and tailored in package design. Several commentators have identified that the psychological contract between staff and organizations has evolved in a way that high potentials and good performers have increased negotiating power (Sparrow et al., 2010; Conway and Briner, 2005) in relation to amongst other things rewards and this is also true of GM rewards. A real challenge for organizations is therefore to be able to engage flexibly with outstanding performers who they really want to motivate to go on assignments and yet have an overall GM approach that is perceived to be fair and performance enhancing. One non-financial way would be to tailor the business support in the form of organizational sponsors, mentors, peer support and GM/leadership coaches. Subsequently, strong linkages of GM to talent management in organizations would support these performance-enhancing solutions without throwing money at the situation.

Salaries and Cash Allowances for Assignment Types

A well-established principle is that assignees, with the exception of LPAs, predominantly receive home-based (balance sheet) remuneration.

Figure 4.5 What salary basis is used in your organization for the following assignment types?

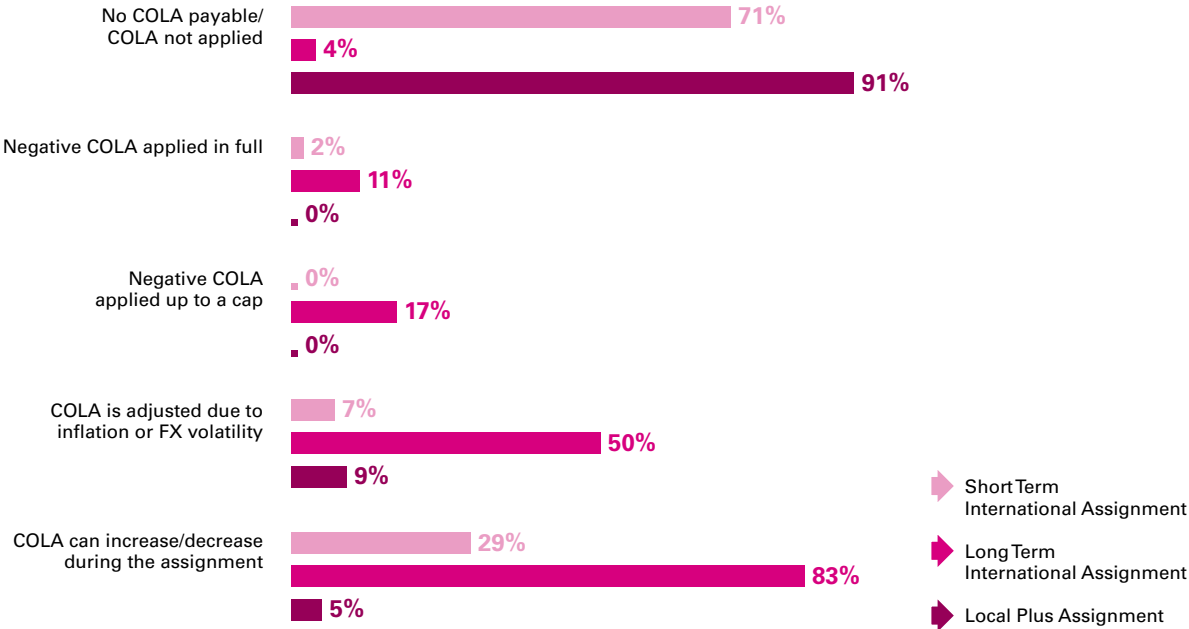


Some of the respondents explained how their organizations made an exception to the balance sheet approach, for example when to move to a host-market based or highest of home or host compensation approach. The factors used to determine the reward approach included salary ranges, tax treaties between home and host and how these affect net income, agreements on social security between home and host country and impact on net income but also impact on the employing company via employer social security contributions, host salary levels (vis-à-vis home) and whether the assignee had an intention to eventually repatriate to the home country. In a minority of cases, firms used an international/global salary scale for LTAs (2%) or LPAs (6%).

The cost of living allowance (COLA) for LTAs is adjusted due to inflation or foreign exchange volatility (in half of the cases) and can increase or decrease. Overall, four out of five long term expatriates might have their reward calculations reviewed (83%). This is far less likely for short term assignees (29%) or staff on local plus arrangements (5%). However, per diems are unlikely to move and COLA adjustments are only undertaken periodically (often quarterly or yearly). Given the substantial foreign exchange swings of recent years (for instance the British pound losing substantial value against major currencies after the Brexit referendum), the ability to adjust COLA calculations is more regularly likely to have provided more financial certainty for expatriates.

We also wanted to understand which COLA index MNCs used and how flexible firms could be to adjust their remuneration during assignments.

Figure 4.6 Please indicate if any of the following apply to the Costs of Living Allowance (COLA) calculation in your organization



Cash allowances and other support elements are components of the reward strategy that can attract staff to apply for jobs abroad (Dowling et al., 2008). In comparison to earlier years, our survey has not only explored STAs, LTAs and LPAs but has also added commuter and business traveller assignments. We focus on cash allowances that are given most frequently by the firms that responded to the survey.

STAs Allowances

About two thirds of firms pay host housing (63%) and home leave allowances (67%). With respect to earlier years, the percentage of MNCs that pay home leave allowance appears to have increased substantially (by 14%) although strict statistical comparisons are not possible with our data. Often STA allowances are paid directly to expatriates as per diems or even to landlords. They can include payments such as utilities or health insurance. Sometimes they also encompass the purchasing of furniture or other one-off costs.

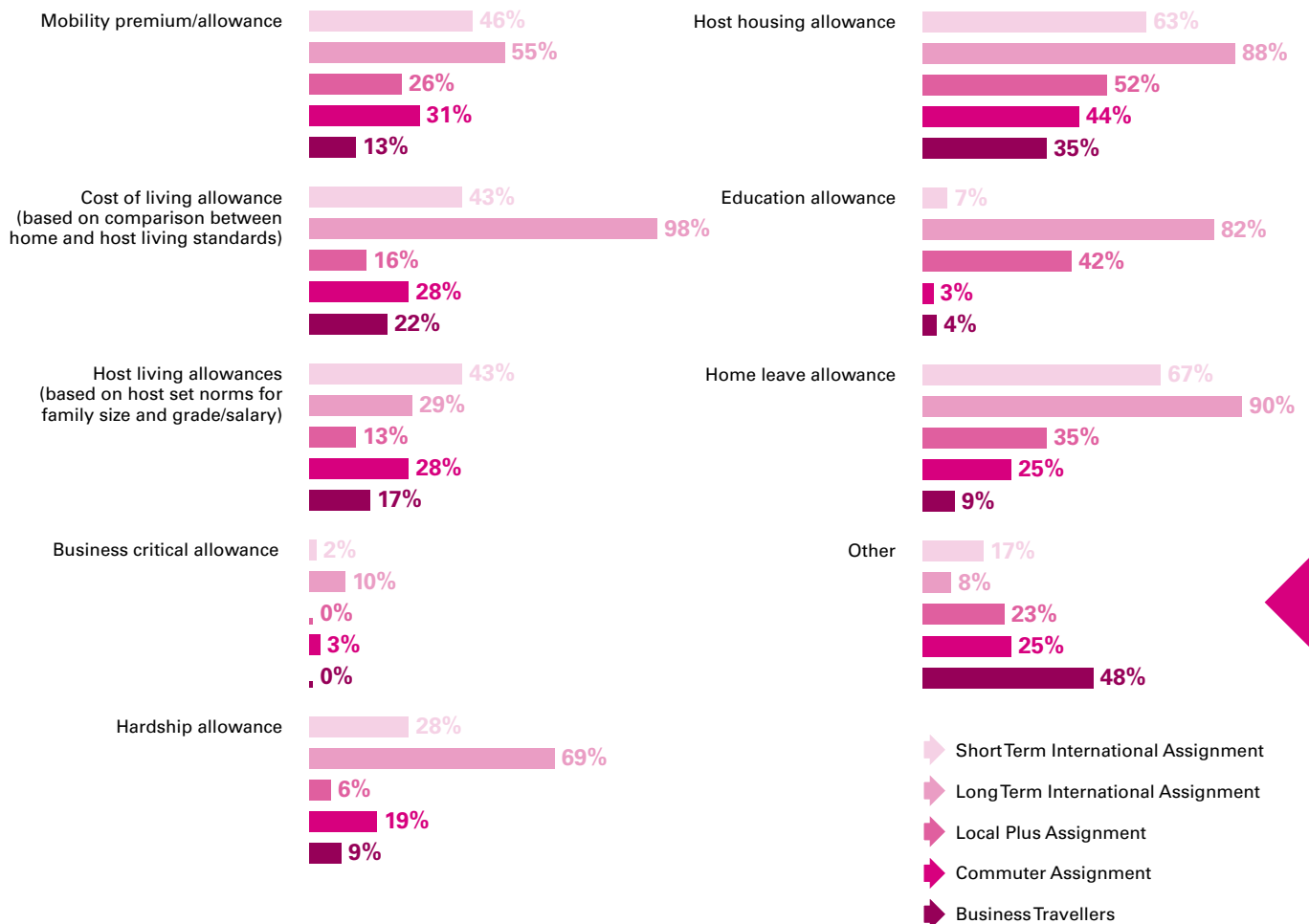
LTA Allowances

Long term assignees are in receipt of many more cash allowances. The overwhelming majority of policies have provisions to give these expatriates COLA (98%), home leave allowance (90%), host housing allowance (88%) and education allowance (82%). In addition, the majority of expatriates who go onto hardship assignments receive a hardship allowance (69%) and a mobility premium (55%).

LPA Allowances

Local plus assignees are on host country contracts so that cash allowances are far less common. In fact, over the years these seem to have reduced so that in our most recent survey only 52% received a host housing allowance with less than half receiving an education allowance (42%). These are now approximately 20% less common than in our survey two years ago.

Figure 4.7 Which of the following cash allowances or support elements are payable in your organization for each of the assignment types listed?



Commuter Assignment Allowances

None of the allowances were paid by more than half of the surveyed companies. However, almost one in two (44%) paid host housing allowance and approximately a third paid a mobility premium (31%), COLA (28%) and host living allowance (28%). A quarter (25%) paid home leave allowance. Additionally, some companies simply pay expenses such as travel fares, meals, hotels, that might not be captured by the GM policy. Overall, it seems that international commuters are not yet on a par with short term assignees and definitely not on an equal footing with long term assignees in relation to the overarching GM approaches. Nevertheless, it seems that several organizations identify their specific needs in relation to housing and other mobility costs/ disruption in their policies geared towards commuters.

What the Experts say

“As businesses drive for savings and efficiencies, the Global Mobility (GM) professional feels those pressures more than most within the HR function. Supporting the business by building assignment packages that cover the basic needs of employees and motivate them to undertake the move, whilst at the same time managing vendors costs and the financial metrics, is becoming increasingly difficult.

The ability of a GM professional to be able to fully understand what motivates the employee, maintain the company policy, and be aware of the detail of what the vendors are able to supply is the key.

Once assignees (and their family) have been assessed for suitability for the trip, the fact finding and introduction to Global Mobility is crucial. From experience, learning about an assignee’s expensive handbag collection and making sure that it is insured properly in shipping is often more important than a second return trip home. With this knowledge, the GM professional can ensure that the basics are covered, and that the package offered is in line with the company’s policy and approach, but additionally and more importantly that the employee is listened to.”

Shakheel Gooroochurn

Senior Manager - Reward
& Recognition EMEIA

Burberry

London, UK

Business Traveller Allowances

Business travellers have drawn the short straw in relation to GM approaches. While we depict some more in-depth insights into their situation in a later chapter in this report, the only substantial allowance they seem to receive frequently is that of host housing payments (35%). In addition, one in five receives a COLA amount (22%). Business travel is mostly seen as an integral part of line jobs and it does not typically attract many extra payments.

Contribution Towards Housing Costs

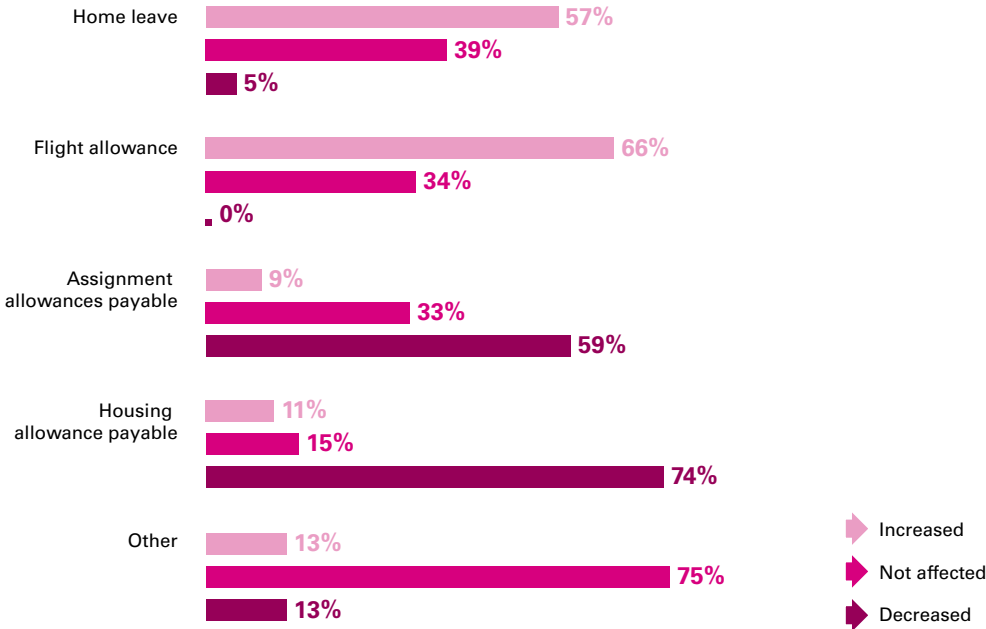
Even though international firms are eager to save costs, they hesitate to ask their short and long term assignees to contribute to their own housing costs. While less than one in ten short term assignees have to pay anything (9%) only about one in four long term assignees (26%) contribute towards housing costs. Astonishingly, two fifths of local plus assignees (42%) do not have to pay towards their housing costs.

Assignment Support and Family Considerations

The survey also wanted to know in what way the company support differed if an expatriate went on the international assignment unaccompanied while the family remained at home for the full duration of the assignment. The findings tally with those of earlier years in that many MNCs vary their support in this scenario, although the provision of extra support seems to become less frequent.

Just over half of the companies surveyed increase home leave (57%) and two thirds amplify flight allowances (66%) if expatriates relocate alone. Understandably, in this scenario, housing allowances are reduced by three quarters of firms (74%) and assignment allowances are decreased by three out of five companies (59%). Earlier RES Forum Annual Reports (RES Forum 2014) have indicated that the size of accommodation for assignees is in relation to their expatriated family size. Thus, it is natural that the allowance is decreased when only one person relocates.

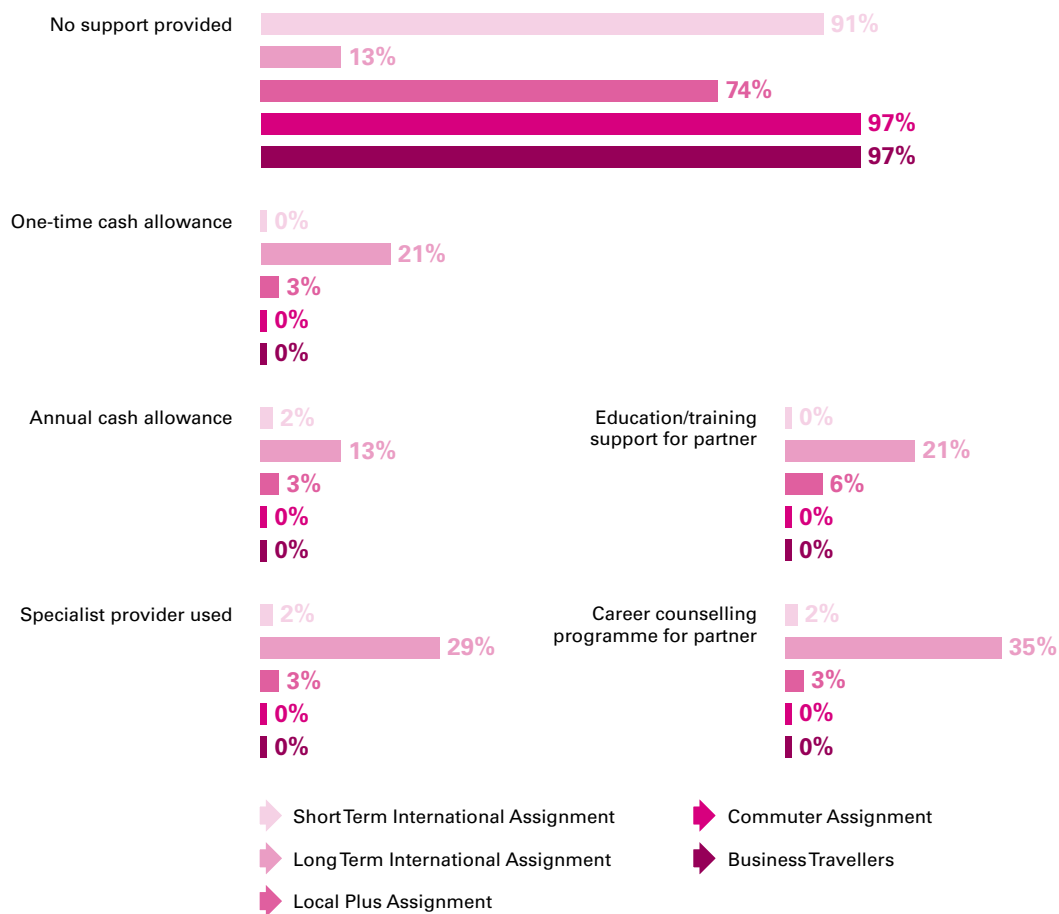
Figure 4.8 In what way does the assignment support differ from standard policy if an assignee goes on assignment unaccompanied for the full duration of the assignment?



Partner Support

It has long been argued that it is important to support accompanying partners. McNulty (2012) claimed that partners support the expatriate emotionally so that she or he is more balanced and can be more focused on her/his own cultural adjustment. Better adjusted expatriates show better performance (Black et al., 1991), are emotionally and cognitively more adjusted and display more appropriate behaviours (Haslberger et al., 2013). More recently, it has been strongly suggested that supporting trailing partners in their careers or other host endeavours is also beneficial (McNulty and Moeller, 2018). To avoid dissatisfaction and to facilitate better performance, many MNCs have partner and family support elements in their GM programmes. The frequency of provision is outlined below.

Figure 4.9 Please describe your organization's spousal/partner support assistance

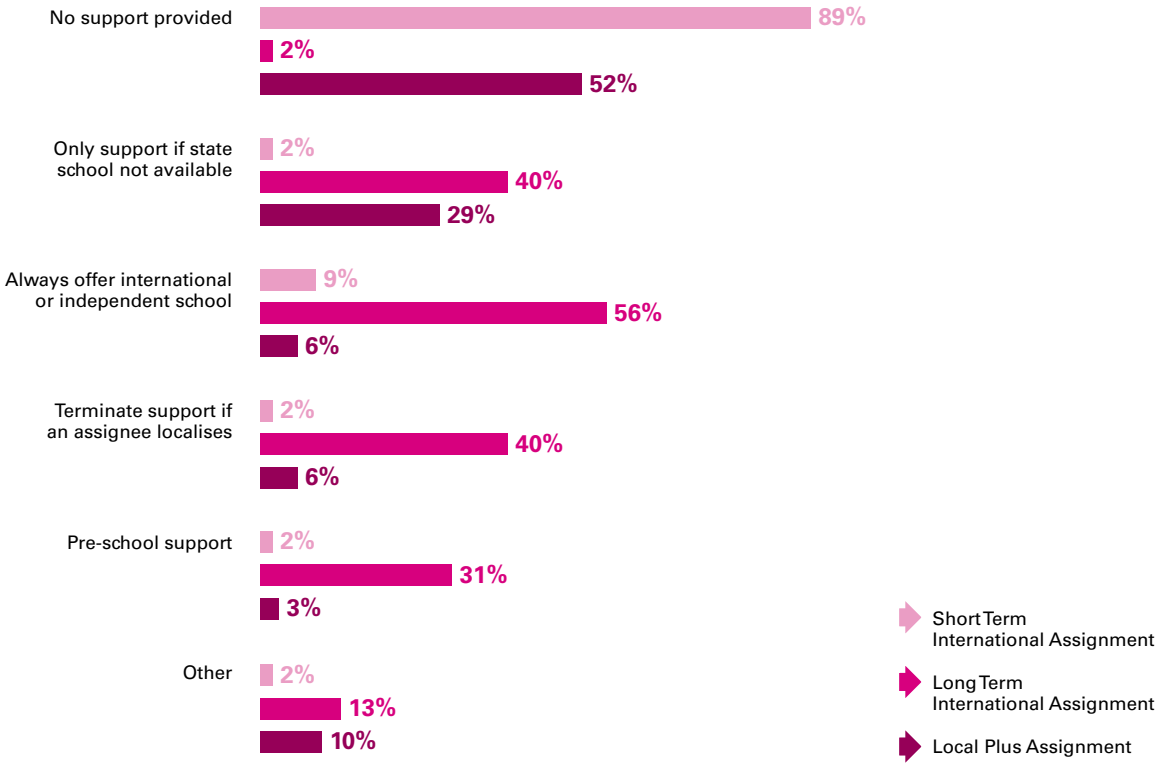


MNCs clearly distinguished their support for partners in relation to whether their assignees are on a traditional LTA (where only 13% do not provide any support) or whether they are on other international work forms. Thus, 91% of MNCs did not offer any support for partners accompanying STAs and 97% did not help spouses of commuters or business travellers. A quarter of partners of localized expatriates received some sort of company support. The most common support forms for LTA partners were career counselling (35%), specialist support activities through professional service providers (29%), education and training support (21%) and one time cash allowances (21%). These cash allowances were normally £1k - £5k and would often be reimbursed on presentation of receipts.

Educational Assistance

The most important concerns of parents on global assignments include the education of their children (Dickmann et al., 2008). Some expatriates, especially from countries where the educational system is perceived to be lagging behind, believe that there are some locations that have excellent state schools. Especially when there is language compatibility (such as Indians coming to London, Angolans coming to Lisbon, Peruvians coming to Madrid or citizens of Haiti or Mali coming to Paris), the provision of paid education in private schools might be less important for such country combinations. However, even then the age of the children, their schooling stage and educational system differences between home and host can be important decision factors with regards to private or state schooling. Large(r) families need more expensive housing, health provision and often more expensive schooling – no wonder firms have moved to targeting younger GM candidates who have no children or more experienced staff with an empty nest i.e. with their children having left the home to study or work.

Figure 4.10 Please describe your organization’s education assistance support

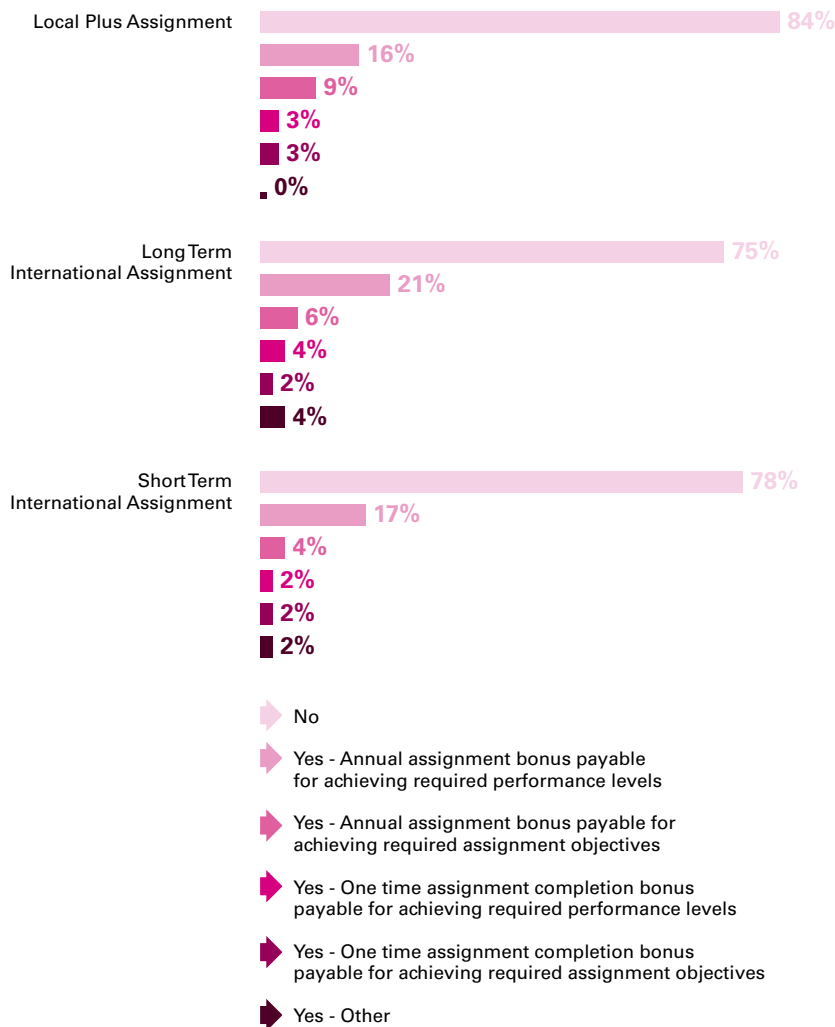


Only rarely is educational support offered to STAs. 9% of firms always offer international or independent schools and only 2% offer pre-school support. Another 2% make this support dependent on the availability of state schools in the deployment area. The picture is radically different for LTAs. More than half (56%) always offer private schooling and a third give pre-school support (31%). In addition, two in five companies (40%) will pay for an independent school if no adequate state school is available. While costly, the offer to pay for independent education is shown to be highly attractive for expatriates and also military personnel overseas. In turn, only half of localized staff (48%) can get educational assistance with most MNCs only granting this if there are no valid state alternatives. With respect to package design it seems to be that over time firms have become more cost conscious.

The RES Forum has long argued that assignments should be planned over the longer term, should be linked to the business and HR strategies and the operational management should be integrated with career, development and performance management. As such, performance objectives relating specifically to the goals of the assignment become important.



Figure 4.11 Is assignment compensation in your organization linked to performance?



Given this background, it is perhaps surprising that assignment compensation is only rarely linked to performance. Three quarter of LTAs (75%), and four fifths of STAs (78%) do not have a performance link to assignment compensation but might well have one to locally set objectives. While there are many complex linkages in reward systems and, especially, much variation in local context, establishing a more direct financial incentive for expatriates to pursue and fulfil their assignment objectives is likely to make organizations more effective.

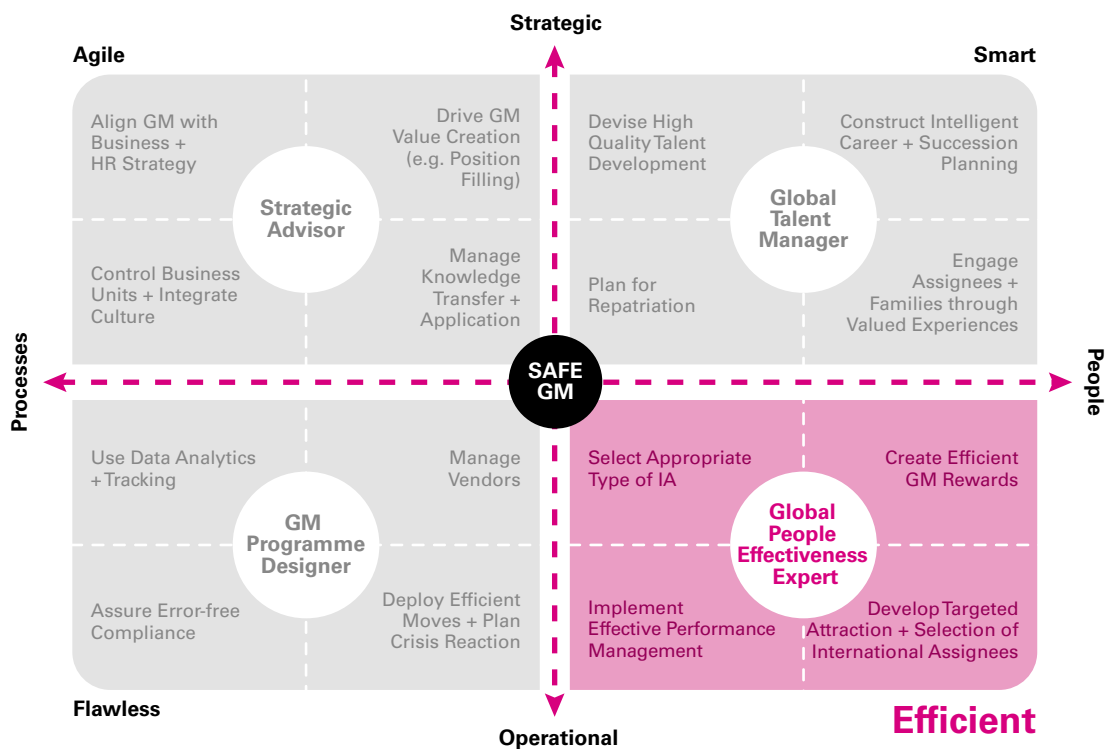


Conclusions and Learning Points

This chapter has traced the trends in reward package design within major MNCs and it provides plenty of detail in terms of different reward components in relation to short and long term assignees, local plus staff, frequent business travellers and cross-border commuters. In addition, it identifies differences in terms of business critical/strategic versus developmental assignments and charts some reward components in terms of a variety of issues such as children's education or benefits when working abroad unaccompanied.

Smart GM approaches can refer to longer-term and organization-wide perspectives. The effective package design section of this report focuses predominantly on the GM and HR approaches of MNCs in relation to assignees. This chapter has presented compensation approaches that elicit specific, achievable and results-orientated behaviours that are measurable during an international assignment. Figure 4.12 outlines the role of an efficient Global People Management Expert. It has a strong base in creating efficient GM rewards. This is closely linked to selecting the appropriate type of international assignment and designing efficient reward approaches for assignees and their particular circumstances. A sensitivity to the drivers of globally mobile staff may allow organizations to develop targeted attraction, selection and management approaches that link into those factors that motivate assignees. By understanding the range of non-financial GM motivators of individuals (see Chapter 2) and through the drive to create growth experiences for assignees (see Chapter 1), it should be possible to create flexible, more efficient reward approaches. These would, almost inevitably, lead to more assignment types and a higher degree of individualization of GM work (see Chapter 1). In addition, a more integrated, cross-border performance management that takes account of global and local assignment objectives, can add to the effectiveness of GM work.

Figure 4.12 SAFE Roles of GM: Efficient Reward Package Design



The identified reward approaches in this chapter allow the reader to benchmark their own GM reward approaches with that of a comparison group of RES Forum member organizations. While this data can help to shape the reward thinking in MNCs, it is important to factor in further contextual, location and assignee population specific considerations outlined above. Multiple and highly pertinent learning points can be distilled from the data and the thoughts embedded in this chapter. The recommendations to improve the efficient package design in an MNC organization include:

- ▶ Distinguish different assignment lengths so as to develop a suitable reward package. We have seen that short term and long term assignments are associated with diverse reward components. It is common that MNCs distinguish between local and international contracts. Normally, local plus assignees have compensation packages that are a lot less generous than those of STAs and LTAs. In addition, companies may consider introducing region-wide international contracts for some staff.
- ▶ Distinguish between different assignment patterns. Cross-border commuters and professionals on extended business travels have different needs and a tailored reward package can be attractive to these global workers while saving resources. However, it seems that organizations have not always developed crucial support structures in response to their idiosyncratic needs.
- ▶ Distinguish different assignment purposes. It has become abundantly clear that developmental assignments are treated less generously than strategic ones. Assignees are likely to be motivated by different (learning and career) factors and have mostly different demographic factors (age, career position).
- ▶ Distinguish between locations and business areas where the supply of mobile candidates is low. Monetary rewards and non-financial rewards in the form of business sponsors, coaches, mentors and career opportunities, may have to be increased in order to attract sufficient and well-qualified candidates.
- ▶ Distinguish powerful actors from less powerful candidates. High potentials and good performers have increased negotiation power. A real challenge for GM reward is therefore to be able to engage flexibly with outstanding performers who they really want to motivate to go onto assignments and yet have an overall GM approach that is perceived to be fair and performance enhancing. One non-financial way would be to tailor the business support in the form of organizational sponsors, mentors, peer support and GM/leadership coaches.
- ▶ Distinguish between more and less attractive locations, hostile and safe destinations in order to tailor rewards and other package elements.
- ▶ Distinguish the performance of assignees. Thus, link some elements of rewards to the overall assignment performance objectives and their achievements.
- ▶ Distinguish the developmental and career interests of candidates within the reward and wider HR system in order to increase the willingness of staff to work abroad, to perform highly and to continue to remain in the organization long term.
- ▶ Distinguish wider motivations to work abroad (including a sense of adventure, learning about specific countries, cross-cultural interests) in order to factor these in to the broader assignment offer. These wider motivations in combination with location context may trigger a form of reward choice/GM cafeteria approach with respect to rest and recuperation or travel entitlements.

- ▶ Distinguish the family situation and other (caring) obligations of expatriation candidates in order to give them a suitable reward offer. Consider where assignees can reasonably be expected to contribute to assignment costs. For instance, evaluate a contribution to housing costs or children's education investments.

It is clear that GM departments often incorporate many of these recommendations. Nevertheless, it might be advisable to periodically consider whether their approaches can be refined or updated. The RES Forum data clearly indicates that in many MNCs not all of these recommendations are enacted. We have argued that in order to create 'efficient' GM rewards MNCs need to get the balance right between cost-savings and attractive and motivating compensation approaches. Indeed, it is some of the non-financial initiatives embedded in wider HR approaches (career and talent development systems, attractive psychological contracts, work contents that allow learning and growth, leadership coaching and mentoring) that can be the key components of wider rewards for assignees. To get this particular balance right, it is paramount to understand the diverse target groups of globally mobile employees, have a highly developed understanding of and cooperation with the organization's talent management teams, and trace performance implications of the array of tailored GM approaches.

Main Survey Data Source: RES Forum Survey - Assignment Package Design, December 2017, 49 responses



South America, Brazil
Rio de Janeiro

Closing the Mobility Divide



Expert view by Mobility Empowered
Chris Kline, Chief Marketing Officer and
Co-founder of Mobility Empowered &
President of The RES Forum Americas



For many years, it was simple to categorize relocation programmes as ‘Outsourced’ or ‘it’s up to the employee’. The ‘two option’ approach was driven by the richness of the benefits, ability to administer the policies and the investment appetite of the corporation. Employees were relatively satisfied if the majority of their needs were addressed and the client was satisfied if they didn’t overspend. The paradigm has shifted and the shift has created a divide between suppliers, clients and employees.

Industry Overview

With an estimated 50 billion US Dollars in annual spend, the (employer sponsored) relocation marketplace represents a significant opportunity in the face of rapid change. As long as multi-national corporations continue to grow, re-engineer, contract or change, there will be a need for relocation services. The level of complexity is normally determined by the transferee’s needs and their employer’s benefit package. The two most common approaches are for the employer to engage with a Relocation Management Company (RMC) to administer the benefit package, or to allow the transferee to manage the relocation and claim reimbursement of allowable expenses. RMC managed programmes are often utilized by employers offering comprehensive plans while attempting to reduce administration, total cost, tax exposure and provide assistance to the employee. Typical services include Real Estate, Mortgage/Banking, Household Goods/ Automobile Moving, Corporate Apartments, Immigration, Tax, Expense Tracking/Reporting/ Budgeting, Area Orientation and Travel. The RMC’s role is to assist the transferee with policy guidance, ordering and coordinating services, auditing and reimbursing expenses and overall programme management. The employer should benefit from less direct involvement, but is often presented with limited flexibility around programme design. More options create more work for the programme administrator.

In lieu of using an RMC, many employers work directly with suppliers or allow the transferee to source and manage the suppliers. Their goal is to provide greater flexibility and cost control. This approach can be very challenging for the employee who has limited understanding or training to find reliable suppliers or understand complex pricing. Since many suppliers present discounts and service levels based on volume, the transferee often pays a higher price for inferior service. Additionally, the employer is tasked with reimbursements, tax withholding/reporting and transferee issues.

The “two option” approach has worked for years. What’s changed?

Employers – Many employers have adopted a ‘Rewards’ approach with a focus on cost control, reduced transaction/administration costs and successful and predictive outcomes. At the same time, they want to provide employees with as many options or as much flexibility as possible. Employers are shifting from rigid policies and/or lump sums to a ‘managed cap’ approach. The employee is presented with a budget amount and allowable benefits. Additionally, they want to make sure the options presented have been vetted, are easy to use and that they provide significant value to the employee. In many ways, the relocation is the first experience a new employee has and the employer needs it to be positive.

Two typical comments that I often hear are:

“Our relocation and recruitment costs are out of control. We need to either cap the benefit or just give them cash.” (CFO)

“Our policies are outdated and too rigid. I lost two candidates because of our packages. We need flexibility.” (Recruiter)

Employees – “I’m special (and I know it), I want everything, I want flexibility and I don’t want to be confined by a policy or ‘one size fits all’ package.”

Employees want more choices and more control over their experience. Additionally, they’re looking to stretch their funds while having an advocate to assist them throughout the process. Historically, this would have been someone within the company and was facilitated by phone calls or e-mails. Today, many employees would prefer to get the information via a dashboard, alert mechanism or chat feature with an expert.

Employees often say, “The lump sum looked great at first, but I could have used help in determining how to use it.”

Suppliers – It’s getting harder to make money. Having been involved in relocation for over 30 years, I can remember when an average executive file fee generated revenue in excess of 7,500 US Dollars. Additionally, the mix of executives to non-executives was much higher. Policies were much more standardized, streamlined and easier to manage. Today’s industry has many more non-executive relocations, increased competition, demand for greater flexibility and significantly higher compliance requirements. Even with advances in technology (which requires a tremendous amount of investment), suppliers are struggling to keep up. Many suppliers identify their ideal customer and then focus on those pursuits.

I recently heard the President of a global relocation company say:

“The profile of the client needs to fit. We’ll struggle to make money based on custom approaches to each move and low service fees. This isn’t our type of client.”

Eliminating the Divide with a Third Option

Every employer is faced with the objective of saving money and giving their employees viable options while competing in a worldwide market for talent. RMCs and properly equipped in-house programmes are positioned well to meet the needs of employees based on certain criteria. The team at Mobility Empowered (ME) focuses on the employers and programme types that option one or option two can't adequately serve.

At ME we discussed the challenges and developed the relocation industry's first online marketplace for relocation services. Our approach is to seamlessly connect suppliers, transferees and employers through a highly configurable platform. Considerable consideration is given to the needs of all involved to reduce steps and human interaction. Our product has a wide audience beyond just global multi-national corporations. The product has been developed for NGO's, universities, hospitals/healthcare, religious organizations, associations and affinity concepts.

The ME approach allows the transferee and/or the employer to determine the most appropriate experience and/or services selected. The ME platform establishes budgets and benefits based on the employer's policy and transferee needs. Budgets, benefits and expense reimbursements can be managed through lump sums, managed caps or traditional policy limits. Status, performance and cost data/metrics are tracked and made available to all parties involved.

About Mobility Empowered

Mobility Empowered is the easiest, most cost-effective way to relocate talent, anywhere in the world. As the industry's first open, online marketplace, we seamlessly connect companies, their talent, and top relocation suppliers through a central platform designed to meet unique needs. www.mobilityempowered.com



North America, Mexico
Mexico City





SAFE Global Mobility

Managing Alternative Forms of International Work

by Professor Michael F. Dickmann



Middle East, United Arab Emirates
Dubai

Chapter introduction by: Daniela Krippner, Deloitte Germany

*Senior Manager, Global Employer Services
(Global Mobility and Business Travellers)*

When I was asked to write the introduction to this chapter of the RES Forum Annual Report, I was delighted as the content fully reflects my personal observations within Global Mobility over the past few years. The tremendous speed at which businesses take decisions simply means that they require more readily available assignees and shorter assignments to offer to their highly skilled employees. And this need is today not only limited to certain areas of businesses - rather each multi-national company requires an internationally mobile workforce. The all important question today is: Is your organization ready to transform your well-established policies and processes created for long term assignments and turn them to the needs of short term assignments (STAs) and extended business travellers (EBTs)?

If the answer is no, this chapter should be your starting point to reflect on the required changes. The need to act is clearly shown in this chapter as performance, career opportunities and retention rates of STAs and EBTs are better when compared to other forms of international work. Nevertheless, it is interesting to see that compliance (tax, immigration, social security and payroll) as well as the experience of isolation and loss of family life, are equally considered as stress factors by both employees and Global Mobility professionals. On the one hand, compliance can be achieved by implementing policies and processes including an effective tracking of STA and EBT populations. On the other hand, the need to address the personal challenges by providing coaching, training and mentoring should not be underestimated. As resilience training programmes are becoming more and more popular, the focus of these programmes should be on your internationally mobile workforce. In my opinion, young talent needs support just as much as senior management, since family and work-life-balance matters to all areas of the workforce. Don't miss this opportunity for advance preparation to manage the rising demand for STAs and EBTs within your business. I am sure this chapter of the report will be a great support for you to prepare for managing these alternative forms of international work.





SAFE Global Mobility

Managing Alternative Forms of International Work

by Professor Michael F. Dickmann

Introduction

The importance of non-traditional forms of Global Mobility (GM), such as international business travel, cross-border commuting, localization and short term assignments, is substantially increasing in an ever more integrated and interdependent global economy. This chapter looks at a number of alternative scenarios which require globally mobile employees and seeks to determine which assignment type is the most appropriate for each form. As in the earlier chapters of this report, we use the concept of SAFE GM – i.e. an approach to international work that is smart, agile, flawless and efficient. We will start the discussion with short term assignments (STAs) which are typically defined as assignments lasting less than a year (Tahvanainen et al., 2005: 7; Collings et al., 2015).

Kang et al. (2017) see clear signs of a faster growth in short term assignments than longer term ones. In fact, over time, we may argue that STAs have become so popular that they may not be regarded as non-traditional in the future. Nevertheless, they do have a number of different programme management and people effectiveness implications (see Chapters 3 and 4 of this report).

There is little doubt that STAs are an important area to understand. Mercer (2017) has recently argued that organizations are shifting their assignment patterns towards a preference for STAs. Santa Fe (2017), ECA International (2016) and Cartus (2012) found the use of STAs is rising.

Key Recommendations for Managing Short Term Assignees

1. Specify IA objectives to support agility, flexibility and purpose
2. Attract digitally native and communication savvy STAs
3. Use career development insights to improve attractiveness
4. Select culturally agile, open and confident STAs
5. Understand and use the strengths of STAs and LTAs
6. Augment STA numbers as their goal achievement is high
7. Channel the performance of STAs towards their areas of strength
8. Personalize development, coaching and mentoring
9. Master the compliance challenges
10. Create innovative solutions to deal with important 'soft' STA challenges



The reasons for these trends can be manifold. Harvey et al. (2010) see the rise of STAs driven by organizational circumstances (e.g. better transport and communication, flexible intra-organizational coordination of global units within organizational networks, cost reduction initiatives in GM) and assignee interests (family concerns, the careers of partners, continued networking within the home unit). Yet, the differences to long term assignments (LTAs), the exact drivers of STAs, their management patterns, advantages and challenges are not sufficiently understood (Suutari et al., 2017). The RES Forum gathered data through two surveys to explore these issues in more depth.

Background of the Surveys

The analysis below uses two principal data sources. **Survey 1, 'Management of Short Term Assignees'**, was completed by 43 GM professionals. Almost half their organizations (47%) employed more than 25,000 employees, with a further 49% having more than 5000 staff. No MNCs with less than 1000 staff participated. 37% of MNCs had more than 250 assignees (almost one in ten had more than 1000). A quarter (23%) had more than 100 STAs with a further third (30%) employing between 26 - 100. **Survey 2, 'Exploring the Differences in Management of Short and Long Term Assignees'**, was completed by 60 GM experts. Again, these were from very large organizations. 58% of the respondent firms had more than 25,000 employees. 36% of these had more than 250 assignees (12% had more than 1000). One in five MNCs (20%) had more than 100 STAs with a further quarter (25%) having between 26 - 100. The GM professionals responding to the two surveys were in charge of many thousands of STAs and LTAs, thus providing a robust platform for our analysis.

What the Experts say

"The past five years or so have seen a move away from 'traditional' assignment types and an increase in alternative technologies to facilitate flexibility in cross-border work. Ecosystems, package modelling, core-flex and employee and business self-service apps are all pushing the boundaries of mobility technology as our private lives are augmented by AI (Artificial Intelligence), IoT (The Internet of Things) and VR (Virtual Reality). While these are also exciting areas of business digitalization, the simple capability to track and monitor key compliance is already mature, yet only 25% of organizations formally track their extended business travellers at all, as can be seen in this chapter of the report.

As companies implement digital platforms that seamlessly integrate across HR (Accenture calls this 'Frictionless Business'*), our rapidly evolving mobility world is clamouring for attention, but is in danger of being left behind. Preparing for the future means eliminating outdated legacy systems to truly digitalize using smart technology – technology capable of data collaboration across the entire mobile workforce, and of evolving with your business."

Vicki Marsh
Head of Operations, UK
Equus Software
London, UK

*Accenture Technology
Vision, 2018

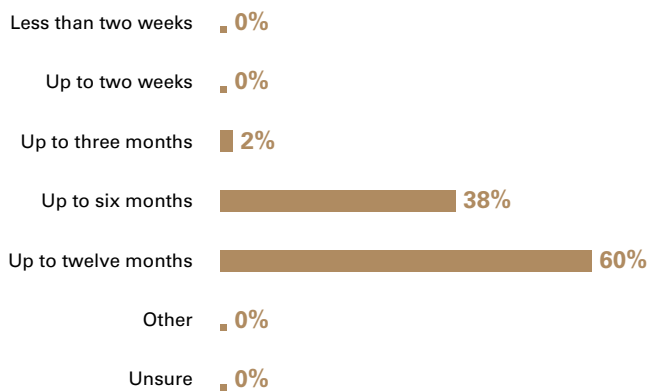
Definition, Trends and Assignment Patterns of Short Term Assignments

Definition of STAs

Survey 1 gave pertinent information about key definition, objectives and management patterns of STAs. There is some confusion around the lengths of STAs in the literature, principally around when extended business travel becomes an STA and when STAs become LTAs. All companies were clear that a work stay less than one month would not be an STA. Some MNCs argued that anything more than one month (16%) would become an STA while most organizations thought that a staff member needed to stay abroad in excess of three months to qualify for STA status (56%).

Those respondents who did not indicate a specific time did so because the transition into STA status depended on local conditions. One respondent indicated “if there will be tax implications on the travel... then GM team are involved” and another said “as soon as the business travel triggers compliance requirements”. Almost all MNCs indicated that STAs would last up to one year, with one exception where STAs can last up to two years. The typical lengths of STAs are outlined in Figure 5.1.

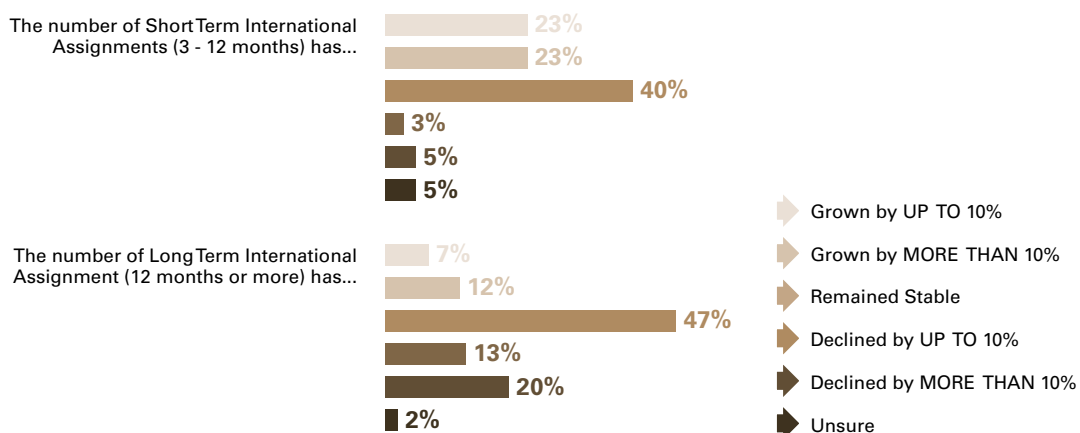
Figure 5.1 What is the typical short term assignment length in your organization?



Trends

Both surveys are relatively consistent in their assessment that STA numbers, on average, are increasing. Survey 1 found that almost half of organizations (49%) experienced STA growth in the last five years. Survey 2 tracks the patterns in more depth and shows that there has been growth in STA but a decline in LTA numbers in the last three years (see Figure 5.2). The reasons for this trend may be related to STAs being used for problem solving objectives which are defined by their singular purpose (Collings et al., 2015) and the relatively lower disruption of the private (family) lives and partners’ careers of expatriates.

Figure 5.2 What have been the trends in STA/LTA numbers within your organization over the last 3 years?



For the next three years, the GM experts predict for their own organizations some small growth in LTAs. However, in terms of STAs they believe that there will be massive growth. Only a small number (3%) think that their STA numbers will decline by up to ten percent. However, a third (30%) believe that their STA numbers will grow moderately (by up to 10%) and even more (40%) think that their STA numbers will increase more substantially. Clearly, issues around short term expatriation will increase in importance.

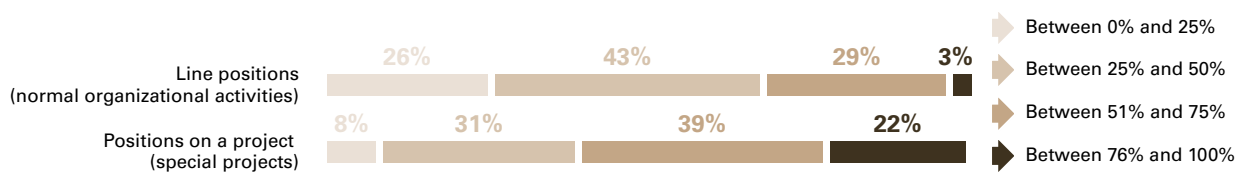
Assignment Patterns

Given that STAs have less time to be fully effective in their new environments and that geographical nearness most often leads to some shared pattern of history, philosophy and culture, it might be tempting for MNCs to send STAs to nearby locations. However, Survey 1 dispels this argument in that two thirds of organizations do not use an obvious assignment location pattern (63%) and almost a third (30%) assign STAs to different continents.

Roles, Objectives and Management of STAs

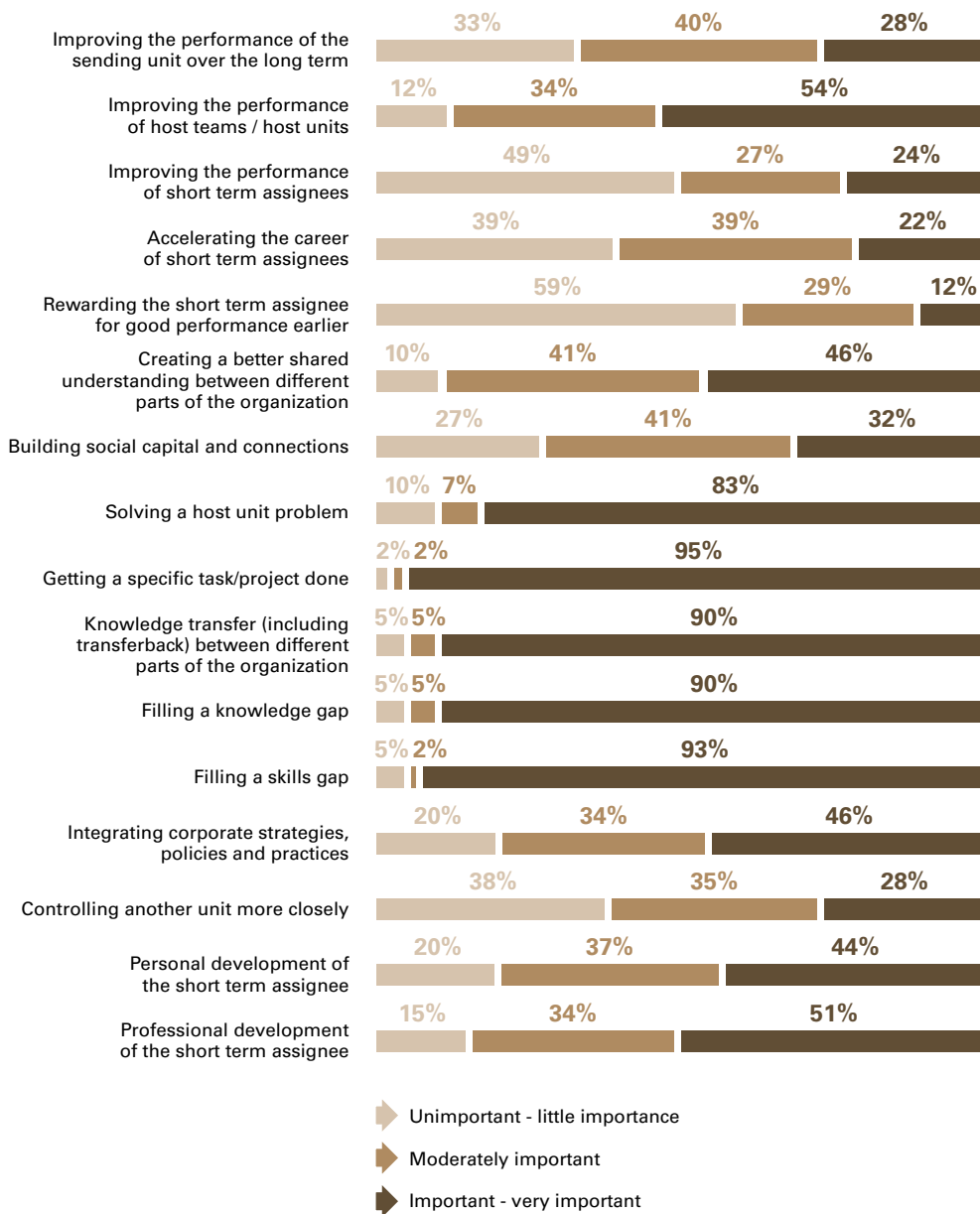
Obviously, the roles that STAs carry out vary. Little is known about these and yet, there is much speculation in the literature that these may be related to special projects. However, with the increased popularity of STAs and companies moving towards an increased attention on the talent management aspects of global work (see Chapter 3 of this report) there might be shifts in this respect. Figure 5.3 illuminates the mix of line and project positions that STAs occupy.

Figure 5.3 What percentage of the work done by short term assignees in your organization is conducted in...?



Indeed, where respondents had access to the data it shows that most STAs worked on special projects. However, in a substantial minority (32%) of firms, more than half of their STAs were in line positions when working abroad. It fits that in two thirds of companies' STAs are more likely to be in specialist technical roles (69%). In contrast, in a quarter of MNCs STAs are most likely to be in managerial roles (26%) while no company indicated that they had a majority of STAs in clerical roles. One MNC stated that they had a majority of STAs in specialist other roles such as security related responsibilities. This assignment preference may be tied to the data that shows that typical STA tasks are in construction, repairs, implementing IT modifications, market expansion initiatives and major projects management (Salleh and Koh, 2013). It might also be temporary opportunities that require access to specialized talent and which result in STAs. Assignees working on high intensity projects can be particularly useful for international knowledge transfer (Minbaeva and Michailova, 2004). Given that there is a predominance of project work amongst STAs, it is no surprise that a large majority (81%) have their objectives determined exclusively by line management while the remainder (19%) has objectives determined by line management with some HRM input. Almost all have their day-to-day activities (93%) determined by line management.

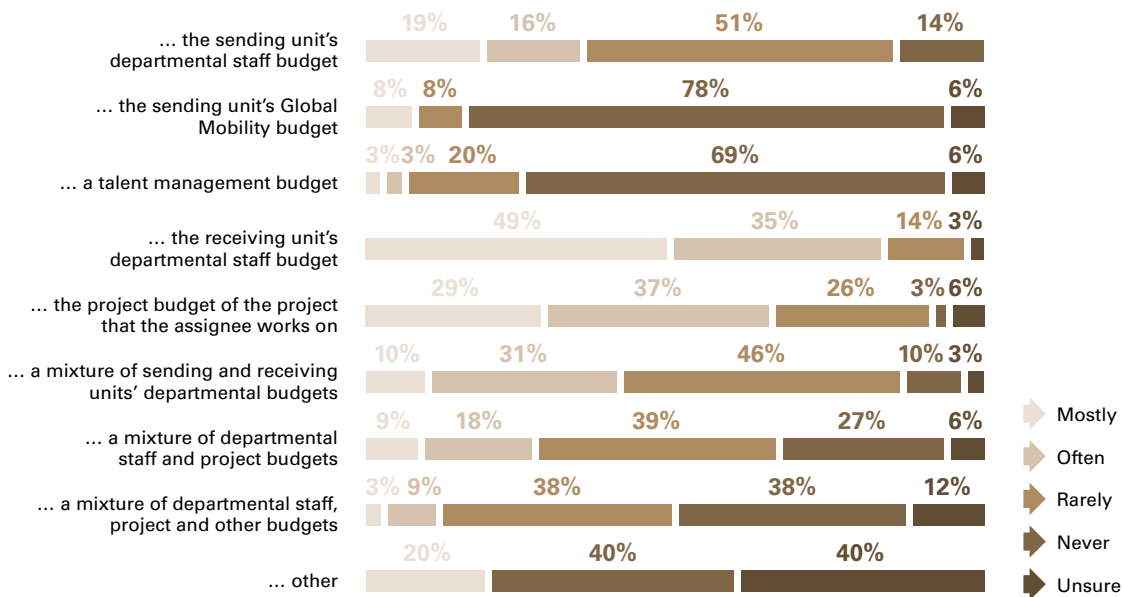
Figure 5.4 How important are the below listed benefits of short term assignments for your organization?



What are the specific organizational benefits of STAs and how important are they? Five areas stand out for MNCs. First, getting a specific task and project done is highly important to 95% of organizations (they indicated important and very important). Filling a skills gap (93%) and knowledge gap (90%), knowledge transfer (90%) and solving a host unit problem (83%) are similarly important. In contrast, career issues, social capital improvement and cultural integration, personal and professional development of STAs is far less important to many of the surveyed MNCs. Most firms are obviously prioritizing organizational interests over individual ones.

There is an astonishing variety of areas/departments/budgets from which STAs are being paid. Figure 5.5 gives some detail.

Figure 5.5 Which budget are short term assignees' financial reward and benefits paid out of?



The most common budget sources to finance short term working abroad are the receiving unit's departmental staff budget (49% of firms use this 'mostly') followed by the project budget of the project that the assignee works on (29% 'mostly'). Again, these are clear indications that local work demands will shape the activities of STAs and that local line management will have much power in the day-to-day relationship with STAs.

Comparing Short and Long Term Expatriation

We have seen above that STAs have been increasing over the last years and numbers are predicted to grow even further. Given that companies have the most experience with the management of LTAs, what are the differences between these types of global work and what can be learnt from these to help improve the management of STAs?

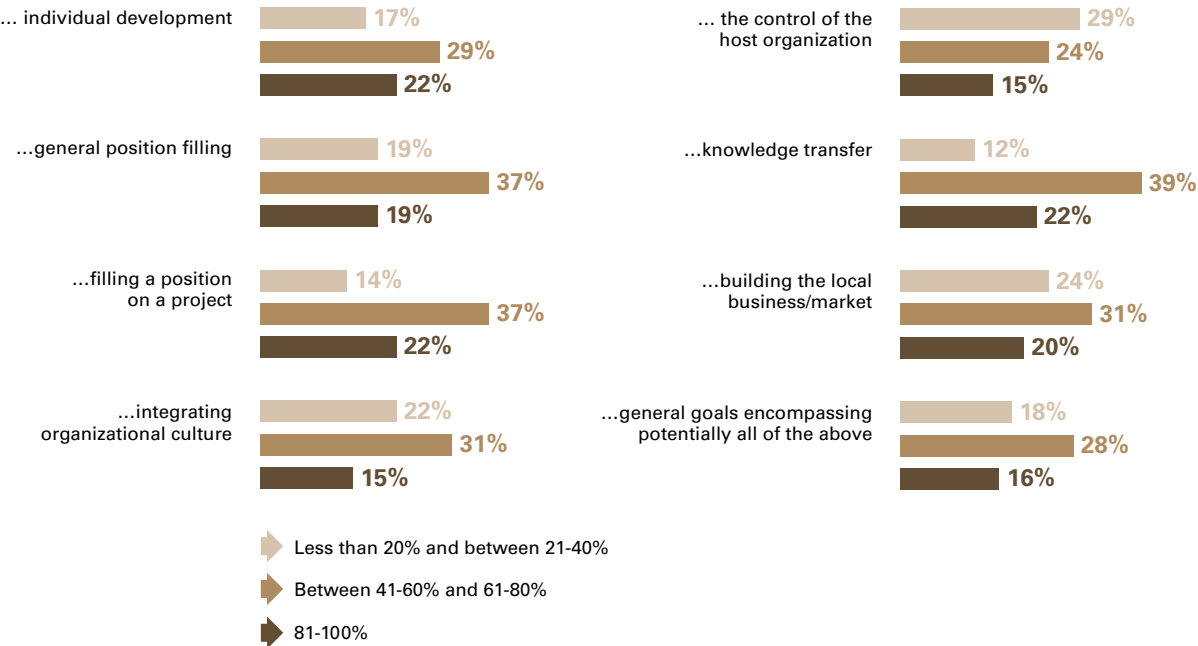
Differences in Organizational Drivers

There are substantial differences in the organizational drivers for long and short term expatriation. Almost all objectives; individual development, general position filling, integration of organizational culture, the control of the host organization, knowledge transfer and building the local business/market, are substantially more important for LTAs than STAs. The difference in the cumulative level of importance (moderately to very) ranges from 5% (for individual development) to 38% (control of host organization). The sole exception is the objective to fill a position on a project that is more important for STAs (by 22%). This may explain the willingness of MNCs to arrange more costly long term expatriation as these assignment goals are seen as highly important in the firms.

Candidate Supply in Relation to Assignment Objectives

The supply of candidates for both short and long term expatriation is highly limited (see Chapter 3 of this report). The data shows that both assignment types suffer from severe bottlenecks in terms of having the right number of candidates to fill vacant expatriate positions.

Figure 5.6 Candidate Supply for Short Term Expatriate Positions. For your firm, to what extent do you feel you have the right number of candidates to fill vacant short term expatriate positions? Please estimate with regard to assignments with priority on...



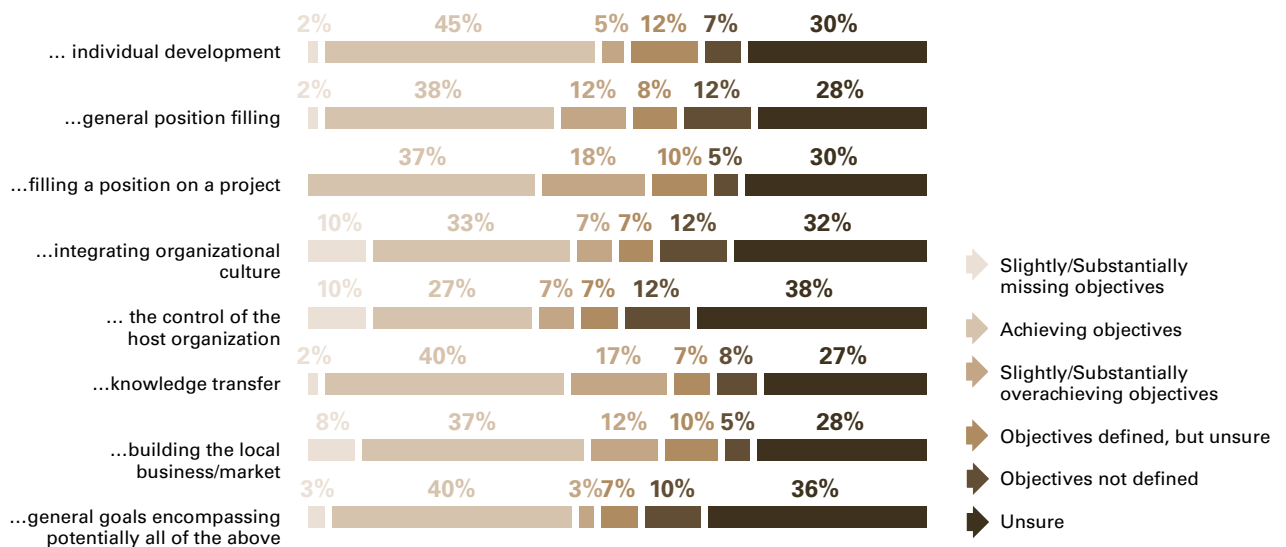
The actual differences between short term and long term expatriate supply are relatively low and do not need to be explored in-depth here. However, as Figure 5.6 shows, in terms of having (about) the right number of candidates (81% – 100%) it is surprising to note that firms normally feel that they have a better candidate supply for LTAs than for STAs (with the exception of filling a position on a project where 5% more companies have a sufficient supply of STAs). Much has been written about STAs being less complicated and disruptive for staff although it seems that the benefits associated with long term moves often outweigh the disadvantages in the eyes of candidates and their families.

Achieving Short and Long Term Expatriation Objectives

There is very good news in terms of whether short term assignees achieve their goals. It is incredibly rare that STAs substantially miss their objectives. Slightly missing their objectives is only marginally more common. In turn, most short term assignees achieve their objectives with some slightly or substantially over achieving their goals.



Figure 5.7 On average, to what extent do short term expatriates achieve their assignment objectives in your organization?



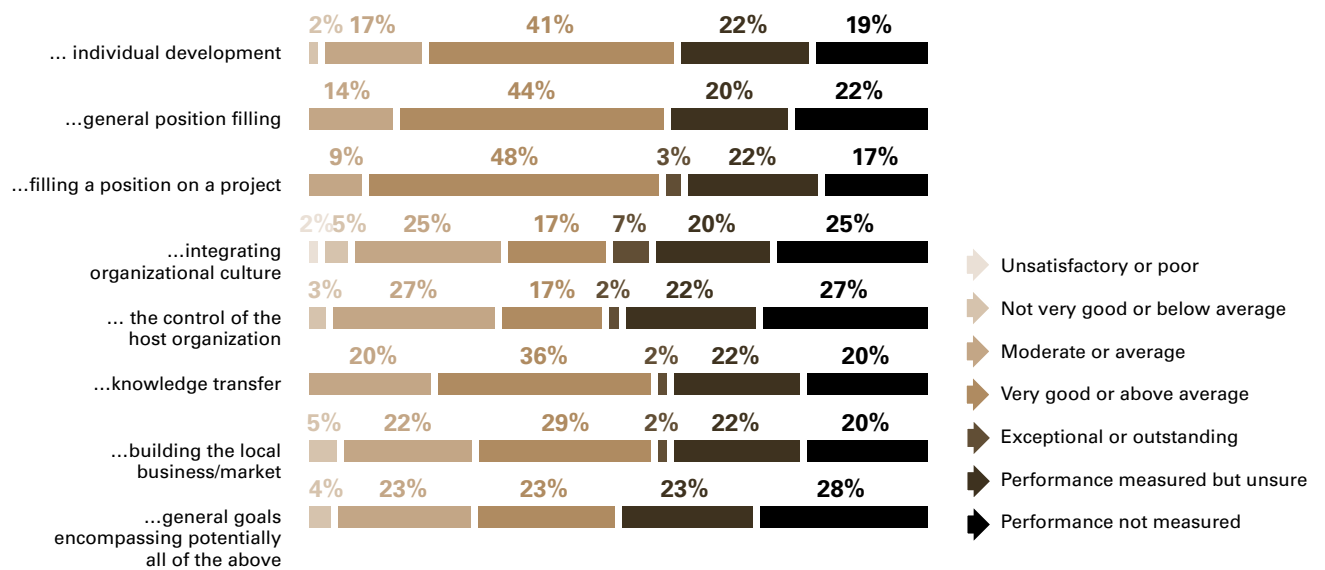
As Figure 5.7 shows, the highest over achievement of objectives is in filling a position on a project (18%), knowledge transfer (17%), general position filling (12%) and building the local business/market (12%).

The achievement of objectives is even better for LTAs. In terms of substantial over achievement, long term expatriates lead STAs in all categories but that of integrating the organizational culture. Again, the differences are relatively small with the exception of building the local business/market where 10% more LTAs are seen as over achieving their objectives than STAs. While the concerns of expatriate failure were frequently pointed out in the 1990s and early 2000s, it seems that low performance, vis-à-vis expatriation goals, is now very uncommon.

Performance of Short and Long Term Expatriates

Given the positive data on the fulfilment of assignment objectives, the performance assessment of expatriates is also highly encouraging. Figure 5.8 demonstrates that below average performance of STAs is rare while very good or exceptional performance is relatively common. Many firms are persuaded that the performance of their short term expatriates on assignments with priority on filling a position on a project (52%), on general position filling (44%), on individual development (41%), on knowledge transfer (37%), on building businesses or markets in the destination country (31%), on integrating organizational culture (24%), on general goals (23%) or on host organization control (19%), is very good or exceptional. While there is a tendency to staff short and long term expatriation positions with good or outstanding candidates, this is nevertheless data that shows that international assignments ‘work’ for both organizations and individuals.

Figure 5.8 On average, how would you rate your short term assignees' performance on their expatriate assignments with priority on...



This positive performance is mirrored in the LTA data. In fact, the assessment of long term expatriates' performance in different assignment types is even better, with three types comparatively standing out. 15% more MNCs thought that their LTAs had a very good or exceptional performance on assignments with priority on integrating organizational culture, controlling the host organization or building the local business/market. Given these assignment objectives, it is easy to see that achieving these may need substantial time – more than many STAs are likely to have.

Career Development of Short and Long Term Assignees

We have seen in the last five years of RES Forum Annual Reports (and in Chapter 3) that on average, working abroad is beneficial for the career progression of assignees when compared to non-expatriated peers. Going one step further, we compared STAs and LTAs.

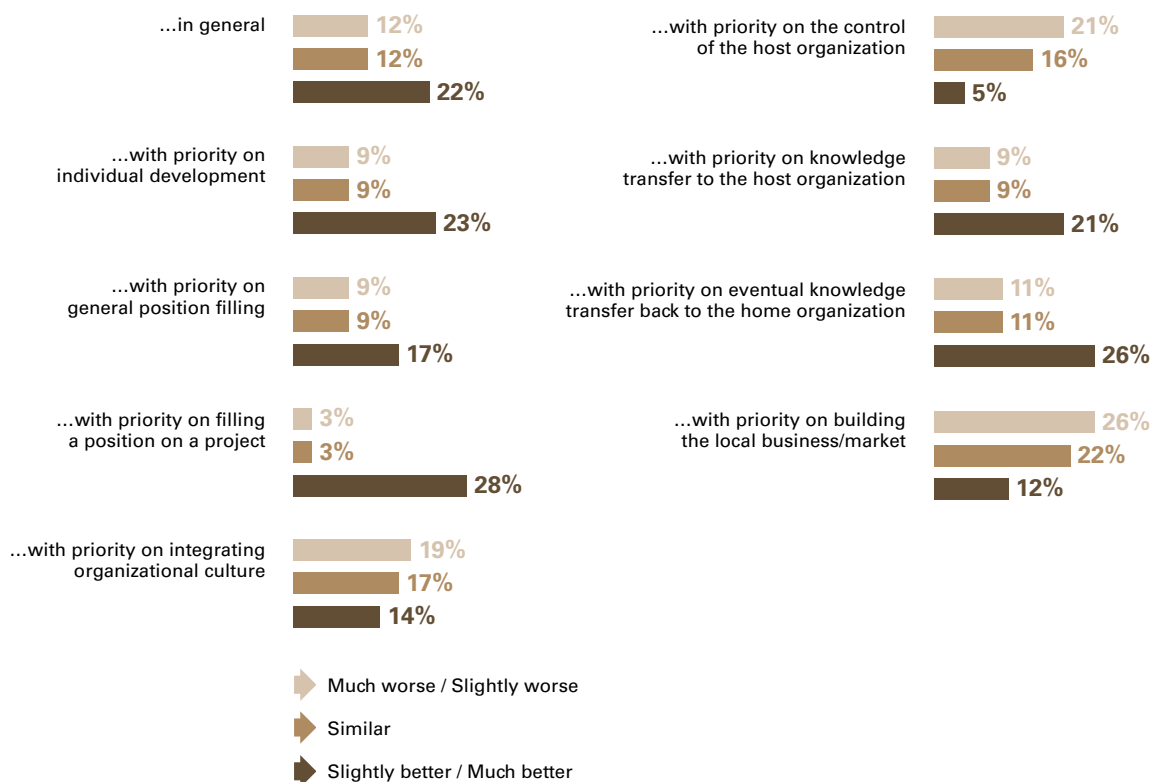
What the Experts say

“The days when the only form of international mobility that companies concerned themselves with was ‘expatriation’ have long gone. Short term assignments and extended business travel have always been there but the growth of international business and the increasing pressures to be cost-effective have thrown greater emphasis on the variety of possible forms; and are beginning to lead companies to consider the totality of their international workforce and to try to manage all forms more effectively. This report is one of the first I

know of to examine the management issues involved. Across a range of major organizations it show that there is considerable scope for better co-ordination, better choices and better management of forms of international mobility.”

Dr Chris Brewster
 Professor of International Human Resource Management
Henley Business School, University of Reading Reading , UK

Figure 5.9 Career development of short term assignees vs. long term assignees. On average, how would you rate your short term assignees' career development in comparison to long term assignees' career development? Short term assignees' career development is...

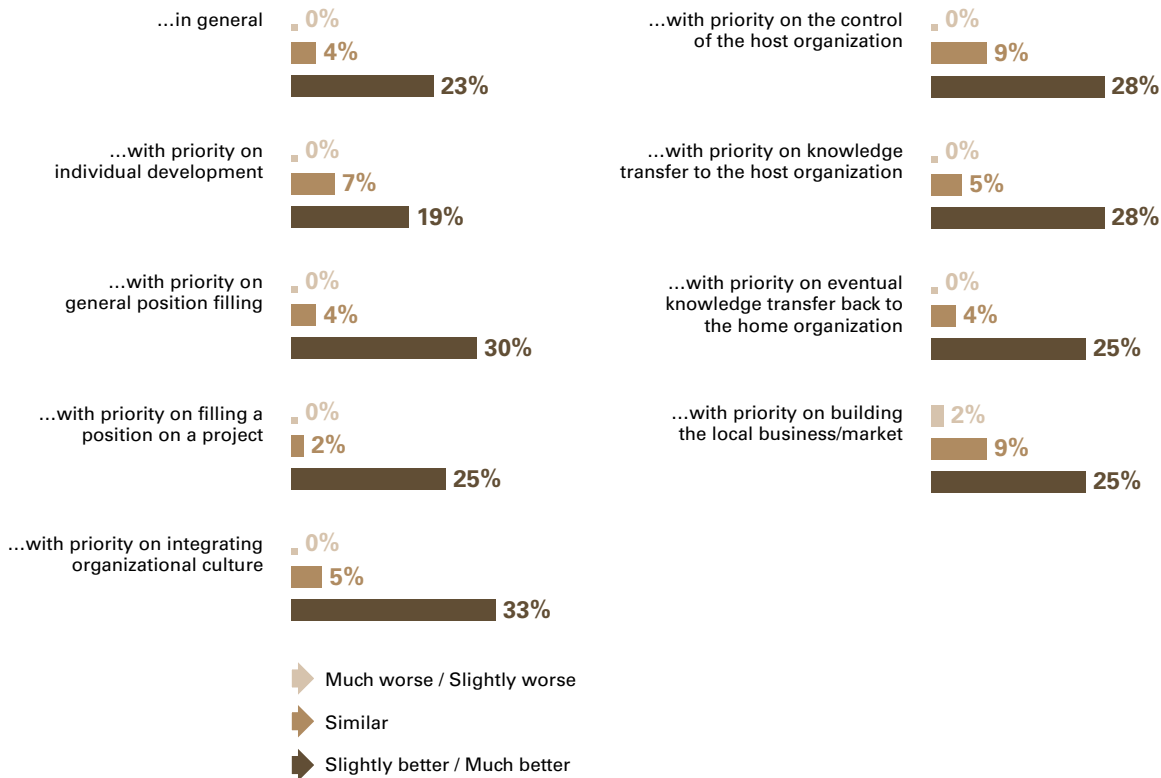


The data in Figure 5.9 shows a surprising variety of elements of career development in relation to assignment objectives. The emerging picture is highly interesting and has not been discussed in the careers or GM literature. Less than a quarter of companies indicated that short or long term assignments have similar career development effects. In career development terms it might be advisable to go onto an STA which has a priority on individual development, general position filling, filling a position on a project, on knowledge transfer to the host organization or over time back to the home organization or simply on a general short term expatriation stint. In turn, LTAs are advisable in career development terms if they have as its main aim to integrate organizational culture across borders, have a priority on the control of the host organization and aim to build the local business. These areas coincide with those where the performance of short versus long term assignees is seen as best and where the objectives tend to be over achieved. Thus, for both organizations and individuals it pays to match the length of assignments to the key priorities and goals.

Retention of Short and Long Term Assignees

Retention problems have been a difficult challenge for MNCs in relation to repatriates. Especially those firms that did not have long term career planning, suffered from non-transferability of the competencies and networks acquired by their global careerists and could not provide positions which were regarded as meaningful and interesting by their returnees, were likely to suffer a high repatriate turnover (Doherty and Dickmann, 2012; Dickmann, 2017). Survey 2 compared the retention of short and long term assignees in a highly inventive and novel way in that it linked it to the underlying expatriation objective as these have an impact on what global careerists learn and experience abroad and what competencies they may transfer and utilize 'back home'.

Figure 5.10 Retention of short term assignees vs. long term assignees. On average, how would you rate your short term assignees' post-assignment retention in comparison to long term assignees' post assignment retention? After repatriation, the retention of short term assignees is...



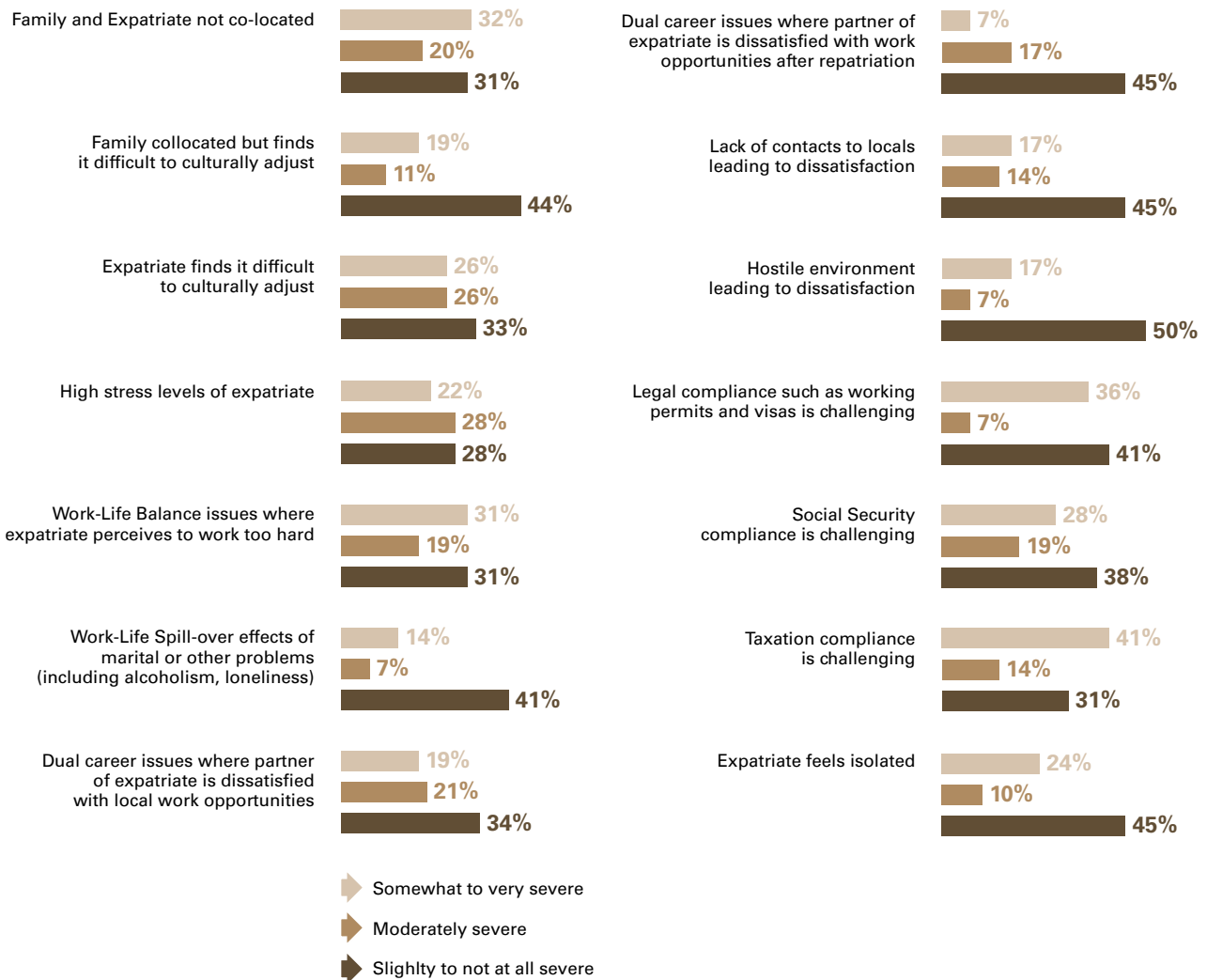
It is easy to see in Figure 5.10 that in every category, the retention of STAs is better than that for LTAs. For some assignment objectives, however, the differences are much more pronounced than for others. For general objectives, integration of organizational culture and knowledge transfer back to the home unit, the retention of short term expatriates is far superior than for LTAs. About 30% of organizations feel that retention of STAs in these circumstances is slightly or much better. It may be the less defined, complex and potentially difficult projects that these LTAs are undertaking that might be less valued at home and that, subsequently, may lead to long term repatriate churn. In contrast, STAs are working abroad for a shorter time and can probably more successfully keep their home social networks. In fact, if the family stays 'put' this is also a strong stabilizing effect that may just provide more social and organizational 'glue' so that short term repatriates are less likely to leave the organization.

Short Term Expatriation Challenges and Success Factors

In general, companies are interested in their global workers being successful. The RES Forum survey wanted to identify the impact of challenges on the success of STAs.



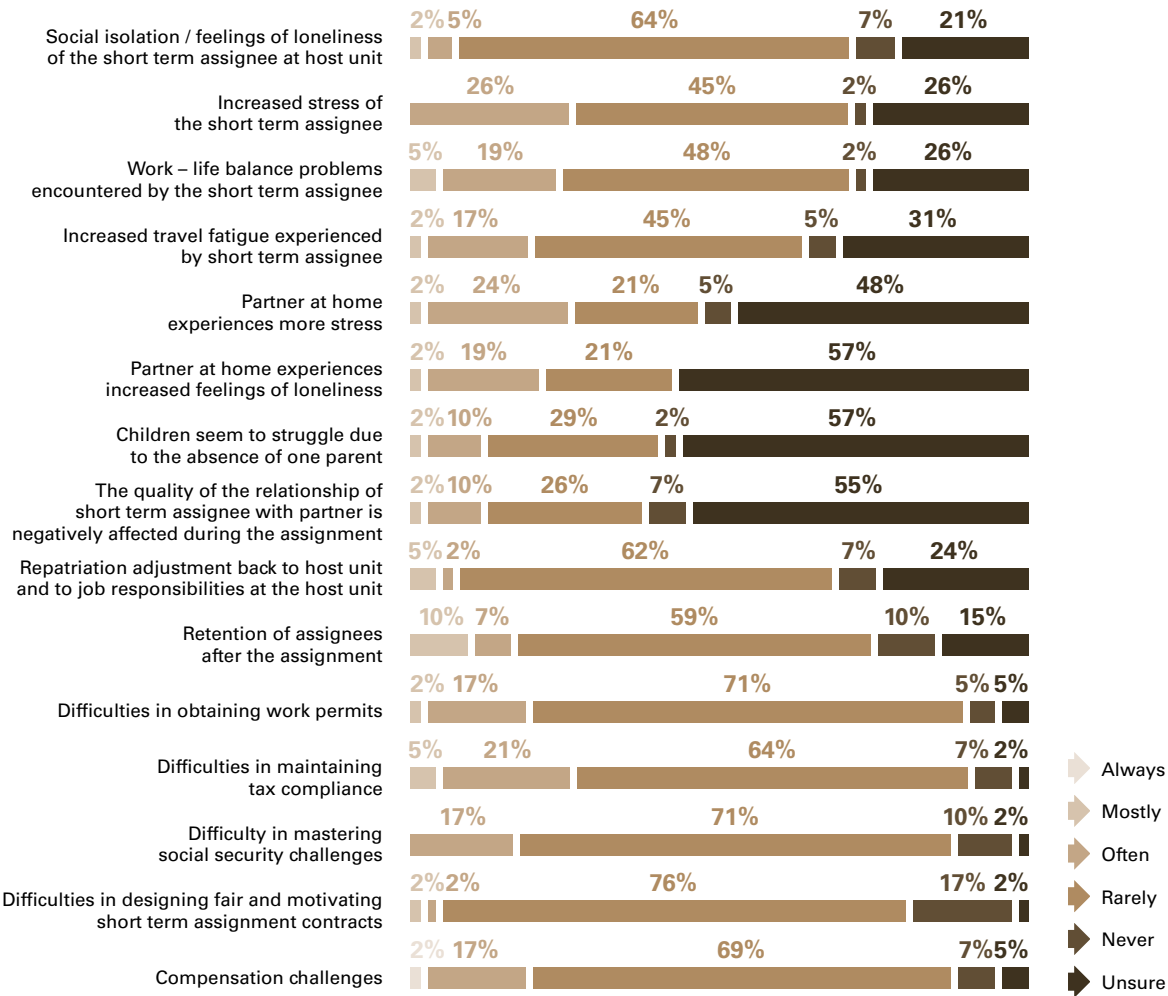
Figure 5.11 Severity of key challenges associated with short term assignments. On average, how severe are the following challenges in their (detrimental) impact on the success of short term assignments ...?



Tax compliance (41%), legal compliance (36%), a situation where family and expatriate are not co-located (32%), work-life balance issues connected to a perception that the expatriate works too hard (31%), social security compliance (28%), cultural adjustment (25%), social isolation of the assignee (24%) and high stress levels (22%) are the most important issues that impact the success of STAs, as Figure 5.11 shows. The compliance challenges are more under the control of the GM department while the other issues which are highly complex (in the sense that there are job design, host country team, expatriate personality, expatriate resilience and assignee family components) are perceived problems.

In Survey 1 we also explored the frequency of problems associated with short term expatriation. The data indicates that, thankfully, most problems do not occur frequently.

Figure 5.12 How frequently are the following potential problems associated with short term assignments experienced in your organization?



As Figure 5.12 shows, the most frequently encountered issues were in relation to tax compliance, stress on the assignee and the partner at home as well as work-life balance problems. In addition, at times, the partner at home experiences loneliness. Several of these issues point out the blurred borders of organizational and private lives in the GM arena.

Survey 2 also asked GM professionals what changes would improve the management of STAs in their organization. Given that each MNC has a unique context to their GM work, it is not surprising that the answers comprised a wide spectrum of ideas. Most prominent were issues of compliance and assignee tracking. Other suggestions were aimed at the interface with other management in that information exchange and cooperation of different departments could be improved. One respondent indicated that what is needed is, “An increased level of education, understanding, implications and required timeliness of Global Mobility on the part of the HR managers and business leaders, with a more thoroughly planned project and succession plan.” This call for a link to talent management and career progression was echoed by many others. Overall, therefore, the issues reflect those that are voiced by GM experts in relation to their overall global work challenges and in particular with respect to long term assignments.

What the Experts say

“Alternative forms of international work now represent the majority of business driven cross border activity. In the global business world it is almost impossible not to be in contact with colleagues, potential clients or customers in another country. Project teams often involve multicultural teams as organizations look to drive greater innovation through increased Diversity and Inclusion and sharing of best practice from across the world. However when organizations move staff on formal long term assignments they invariably provide business related cross cultural support to the assignee to aid their effectiveness in country. However

for these alternate forms of international work, it is more the exception than the rule to provide business specific cross cultural support when engaging with clients or customers or to participants in cross cultural teams when this level of support is a fundamental starting point for ensuring cross border teams work effectively to deliver successful outcomes.”

Peter Hawthorne
Senior Consultant
The RES Forum
London, UK

Conclusions and Learning Points STAs

Our data clearly shows that the importance of STAs is rising. While STAs are jigsaw pieces in the overall picture of GM, particularly used for project work and singular or more clearly determined objectives, this development creates a number of opportunities for GM professionals. The more agile GM departments are, the more likely they are to be able to take advantage of these recommendations:

- Use the shorter time frame and superior ability to specify concrete assignment objectives to support agility, flexibility and purpose of the overall GM work. This is strongly aligned to the refined blueprint for GM work that is proposed in Chapter 1.
- Identify and attract digitally native and communication confident short term expatriates as they will link more easily to the GM self-service platforms as well as keep up their networks and work relationships with their home base.
- Select culturally agile, open and confident STAs as their time to adjustment is shorter than that of LTAs.
- Make a conscious decision regarding how to use LTAs and STAs. Use LTAs in relation to objectives such as individual development, position filling, integration of organizational culture, the control of the host unit and building the local market.
- Consider enhancing STA numbers. It is incredibly rare that short term expatriates miss their objectives, in fact, they often over achieve their assignment goals.
- Channel the performance of STAs. The best performance of STAs is seen by the MNCs to be on projects, general position filling, individual development and knowledge transfer. Utilize suitable candidates for such short term challenges and make sure that they can transfer their own learning and are able to utilize this at home.

- Understand the career development opportunities of short term expatriates and use these to attract candidates. The best career progression is through STAs with priority on individual development, general position filling, project work or knowledge transfer.
- Design personalized development, coaching and mentoring initiatives for high potentials and highly talented individuals on STAs. The retention of short term expatriates is substantially higher than for longer term global workers, especially if their assignment is linked to general objectives, cultural integration or knowledge transfer back to the home unit.
- Work towards mastering the key challenges of STAs. Tax, legal and social security compliance are amongst the key problems associated with STAs and they are plainly in the GM remit.
- Create inventive, flexible and agile approaches to deal with other key STA challenges which include the distance between expatriates and their families, cultural adjustment, work-life balance, social isolation and stress issues.

MNCs would also be well advised to gain clarity of the particular objectives and deliverables of STAs. The most important benefits to MNCs were getting a specific task and project done, filling a skills and knowledge gap, organizational learning and knowledge transfer and solving a host unit problem. Distinguishing which global work form (LTAs, STAs, cross-border commuting, extended business travel or virtual project work) may be most suited to the context and the organizational challenge is highly important. It is then down to the level of agility of the GM function to raise the effectiveness, quality and responsiveness of GM work.

What the Experts say

“Business travellers are a population that have been identified as a high-risk population of staff by compliance-related functions (such as tax, immigration etc) but which until recent years have not been one that national enforcements bodies have prioritized. As the sophistication of enforcement bodies increases it is vital that companies manage this risk effectively. Business traveller risk is owned by different teams in different organizations –where this is owned will be affected by organizational design principles,

however whichever function owns the risk does need to own this in its entirety and where that knowledge is not held in-house, external subject matter expertise for vendors should be sought.”

Roy Fu
Regional Head of
Global Mobility - Asia
HSBC
Hong Kong

Extended Business Travel – Global Mobility’s Neglected Assignment Type

Frequent business flying and extended business travel (EBT) is common in many companies. Many senior managers within multinational organizations have regional responsibilities with titles such as Head of APAC (Asia-Pacific) for example, in logistics. Their role is to co-ordinate and standardize business practice across borders, transfer skills and knowledge and create a cadre of global talent in their area of responsibility. Given these important objectives and the prevalence of use, it is astonishing how little we know about the different forms, lengths and assignment objectives associated with EBT, the management of business travellers and the risks that working abroad for various (short) times pose for employers and staff. The RES Forum Annual Report highlights this neglected assignment type below.

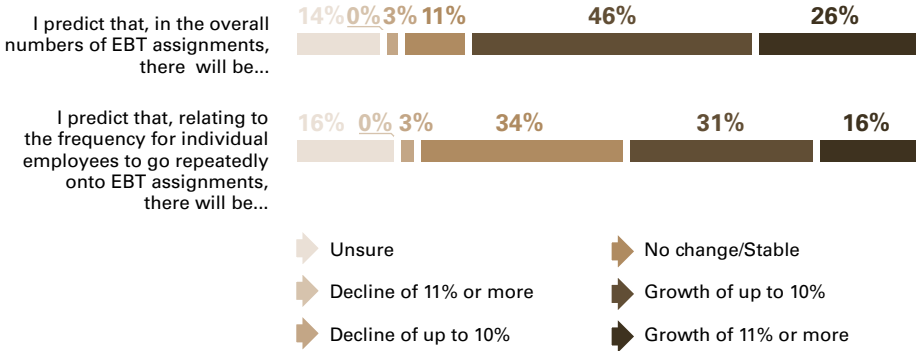
Key Recommendations for Extended Business Travel (EBT)

1. Develop an EBT policy
2. Identify competencies that increase EBTs’ success in their diverse roles
3. Integrate EBT competencies in the selection for global positions
4. Implement formal EBT tracking
5. Design and refine EBT compliance
6. Improve the HR management of EBTs
7. Focus on motivational and health issues of EBTs
8. Augment EBT people effectiveness expertise
9. Use more EBTs
10. Increase ROI through EBT analysis and planning

In 2018, the RES Forum developed and posted the survey, ‘Extended Business Travellers’ to explore these issues. The survey was answered by 36 GM professionals, working for large multinational corporations (MNCs). More than half of these (54%) employed more than 25,000 staff and a further 40% between 5 – 25,000 people. Nearly half (47%) of these MNCs sent international assignees to more than 25 countries. Almost three quarters (72%) had large expatriate populations of more than 100. Some 17% had more than 500 assignees. Almost a third (30%) had more than 100 extended business travellers (EBTs). This number is likely to be higher in reality as one in five companies (19%) was not sure about its EBT number. In fact, this section of the annual report has been titled the ‘neglected’ assignment type as much of the data shows that activities that are undertaken for other assignment types are often not delivered by the GM team or that the GM department does not hold sufficient information about EBTs.

What are the trends in relation to EBT numbers? The data shows that over the last three years there has been a substantial growth in EBTs. Almost a third of firms (29%) have seen the overall number of their EBTs increase by 11% or more and a further quarter (26%) have experienced growth of up to 10%. Only 3% of MNCs, in turn, have experienced a decline.

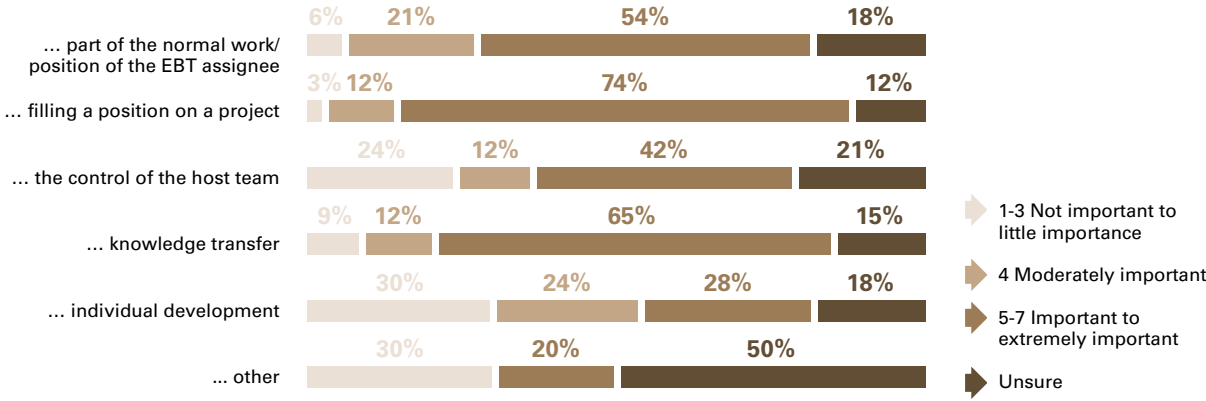
Figure 5.13 What trends relating to EBT numbers in your organization do you predict over the next 3 years?



This growth pattern is predicted to endure. Thus, EBTs are expected to become numerically more important just at a time when it is perceived that some governments are strengthening the implementation of their immigration, work and social security laws.

What is driving the growth of EBTs? As always in GM, there are many different and overlapping reasons for choosing an assignee to do global work. The reasons that are particularly important for EBTs are outlined in the figure.

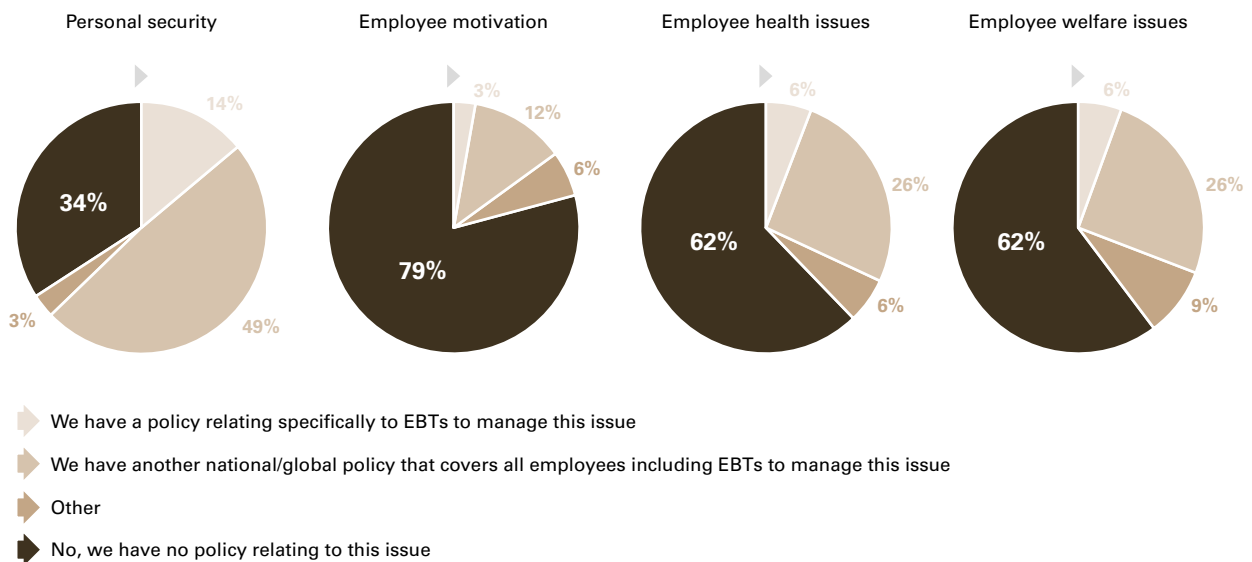
Figure 5.14 We know that each EBT has a specific context and specific drivers. However, looking across your total EBT population, how important, normally, are the following drivers in your organization?



In a similar vein to short term assignments, EBTs are predominantly driven by the desire of their organizations to fill a project position (74% important to extremely important). Other key goals of EBTs are knowledge transfer (65%), international travel being part of the normal work of the assignee (54%) and to control the host team (42%). Individual development is an important objective in fewer companies (28%).

There is much variety amongst MNCs with respect to the management of EBTs. Only in 42% of companies are EBTs managed by the GM team, in a quarter of companies (25%) they are managed by their own departments and in a small minority (6%) they are managed by a different unit, often the travel department. Interestingly, a substantial part (28%) of respondents answered 'other' to this question, with most giving a written indication that EBTs in their organization are not managed at all. It fits that only a small minority of MNCs (22%) have a formal EBT policy. The compliance risks are obvious.

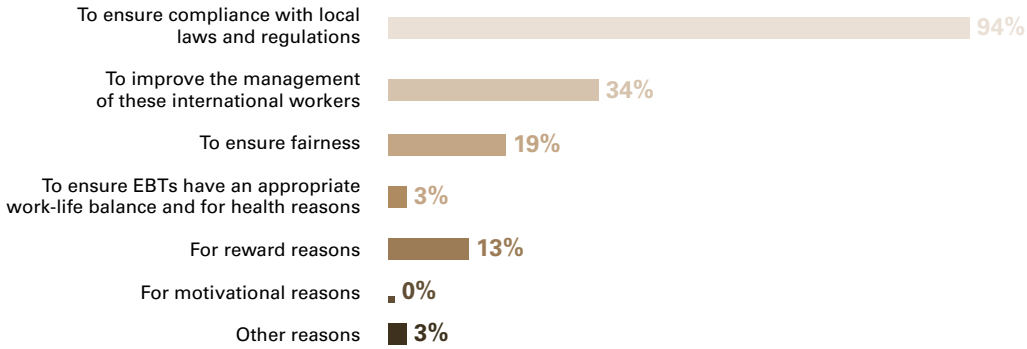
Figure 5.15 Where you gather information about your EBTs in a formal way, what do you use the information for?



The majority of companies do not have a formal tracking procedure (56%), while only a quarter (25%) tracked all their EBTs formally. Where there is information gathered, it is used predominantly for compliance purposes (94%). Other more managerial aspects, such as improving the management of international workers (34%), ensuring fairness (19%), for reward reasons (13%), ensuring work-life balance and health (3%), of for motivational goals (0%), are far less common. Apart from gathering information about the legal necessities (and even these are not done well in many MNCs looking at the deficiencies in tracking), information gathering by GM departments of MNCs is neglected thereby making it impossible to assess the return on investment (ROI) of EBTs as issues such as motivation, fairness, reward or health factors are neglected.

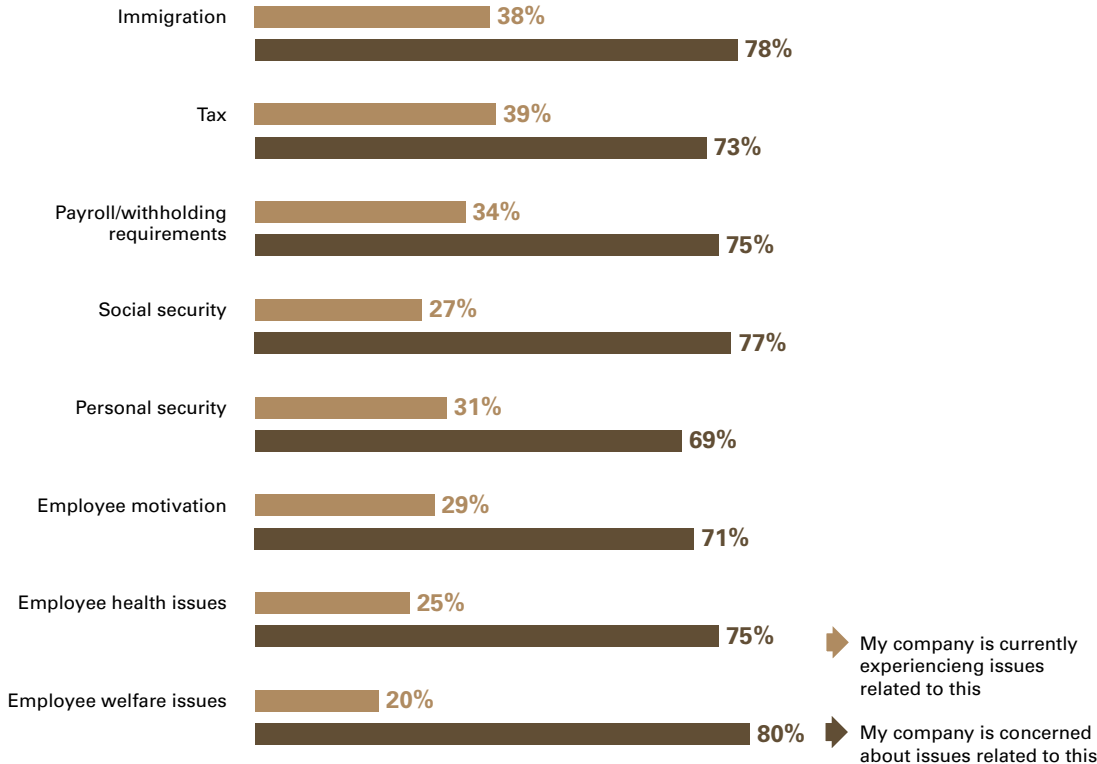
Of course, it is possible that MNCs might have well developed policies and simply do not want to assess their success. This might, for example, be the case in the early stages of policy implementation.

Figure 5.16 Do you have policies in place to manage the following issues relating to your EBT population?



The data shows that companies tend to concentrate on personal security issues where 14% have a specific EBT policy and almost half (49%) manage security for their wider assignee population. Other issues in relation to EBT motivation (79%), employee health issues (62%) such as stress, burn-out or long working hours or EBT broader welfare issues (including loneliness or work-private life spill over effects), are not normally managed. Thus, EBTs are indeed the neglected assignment type with little integrated attempt to consciously manage their particular assignment issues. The occupational health literature points to substantial dysfunctional effects that may arise. These also seem to be risks that have been identified by GM professionals.

Figure 5.17 Which of the following issues and problems related to EBTs is your company currently experiencing/is one of your company’s main concerns?

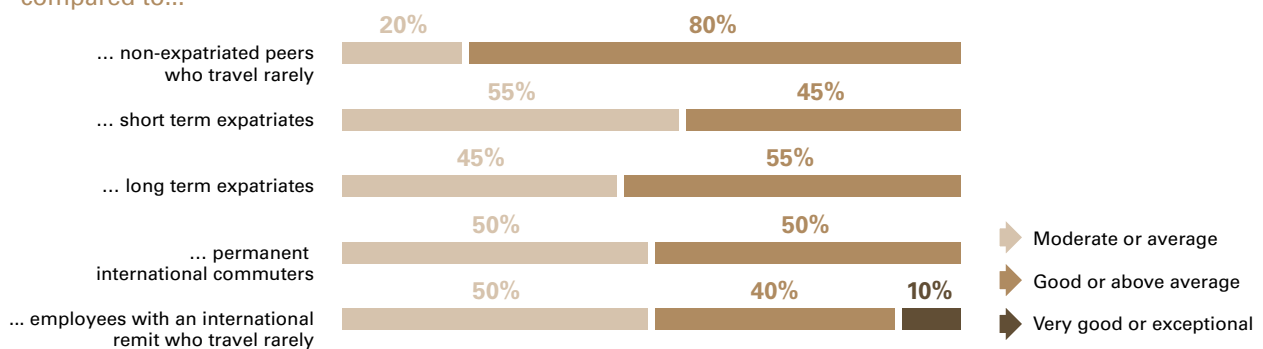


There is a reasonably high chance that MNCs will experience a range of EBT challenges. In terms of traditional GM activities, these include tax problems (39%), immigration challenges (38%), payroll issues (34%) and social security concerns (27%). Fewer respondents answered the wider management challenges with EBTs. They pointed out problems in the areas of personal security (31%), employee motivation (29%), employee

health (25%) and employee welfare (20%). Given the argument that we developed in Chapter 1 in relation to GM with a purpose, the latter set of data does ring alarm bells. Companies are concerned about these issues throughout with the percentages consistently high and ranging from 69% - 80%. Nevertheless, only 6% of MNCs analyze EBT satisfaction scores (but 12% plan to do so in the future). Overall, there is an obvious need to develop suitable policies, to implement these successfully throughout the organization and to manage and improve the quality of these policies. The good news is that firms have already identified the need to do so.

Do extended business travel assignments work out for the organization and the individual? In relation to the performance of EBTs there is some cautious good news.

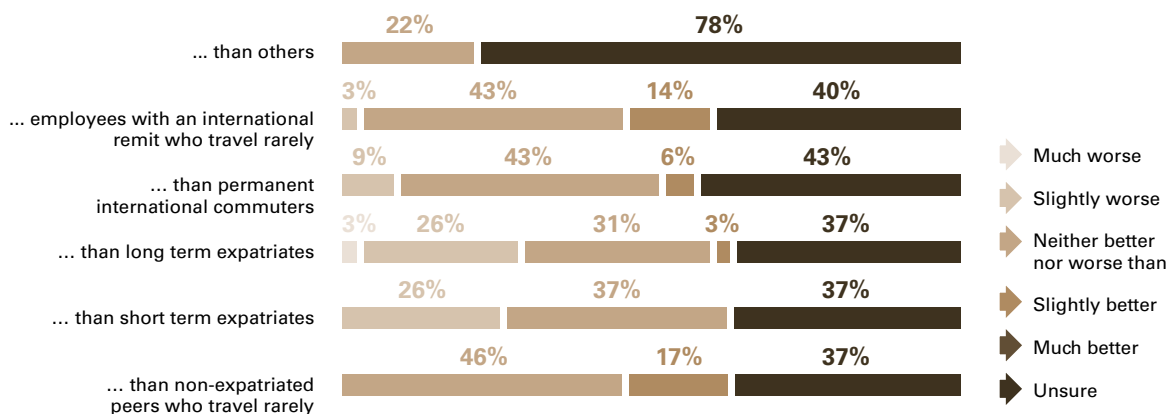
Figure 5.18 In comparison to relevant peers, how would you rate your average EBT's performance when compared to...



In all comparison categories (versus non-expatriated peers who travel rarely, versus short term expatriates, versus long term expatriates, versus permanent international commuters and versus employees with an international remit who travel rarely) the performance of EBTs is either similar or better, but rarely exceptional. The same general trend of either being similar or slightly better was expressed by respondents in relation to retention or motivation. However, given that GM departments rarely had comprehensive policies or management interventions implemented for their EBTs, many respondents were unsure about the performance, retention or motivation data for their populations.

Does frequent and/or extended travel benefit individuals themselves? In comparison to non-expatriated peers there are some limited positive effects. However, when compared to other expatriation types there are some limited negative effects for EBTs.

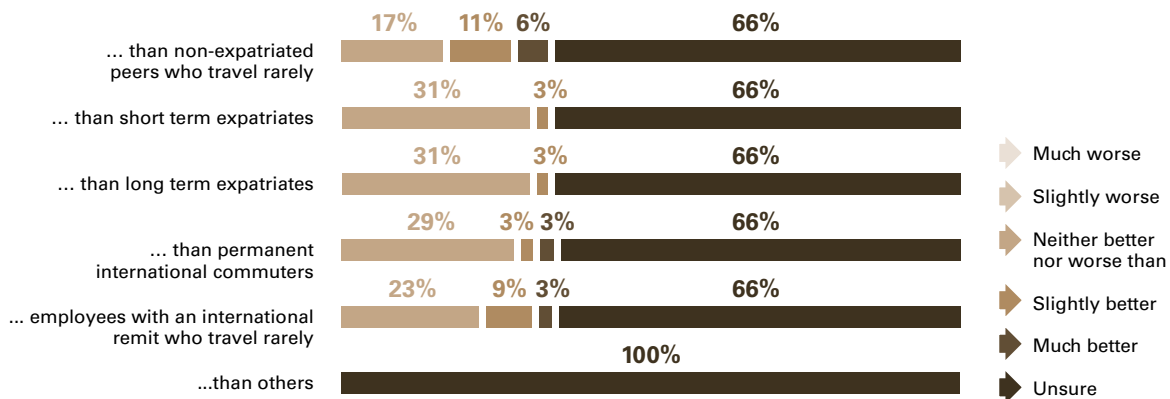
Figure 5.19 On average, EBTs' general working conditions, including reward package, when compared to the following groups are...



Interestingly, EBTs seem to have better general working conditions and better reward packages in 14% of organizations in comparison to their peers who do have an international remit but who travel more rarely.

Another reason to especially exert effort for an organization and it is most likely that EBTs do so through their travel patterns and through living apart from their families, is career progression.

Figure 5.20 On average, the EBT's career development when compared to the following groups is...



Again, a high percentage of respondents were unsure with regards to career progression of EBTs. Those GM professionals who did answer this question uniformly argued that extended business travel is not detrimental for assignee's careers. Going on an EBT is particularly good for career progression in comparison to that of employees with an international remit who travel rarely, or of non-expatriated peers.

Having looked at organizational and individual effects of EBT, we will now focus on the different leadership demands that business travellers face.

What the Experts say

"Technology underpins all aspects of our lives and has long been considered one reason that employees work longer hours and are more susceptible to burn-out than ever before. As STA & EBT numbers continue to rise, the lack of visibility to, and understanding of, the wider implications of increased cross border work – beyond the transactional compliance areas of tax, socials security, payroll and immigration – suggest a danger to the welfare of the future workforce. Now that Mobility Ecosystems are real, the power of analytics provides an opportunity to utilize the ecosystem to gather an

additional set of information from employees on their state of mind, motivations, level of engagement, thoughts and perceptions of their work-life balance or loneliness. This may be the next step in providing the organization with broader intelligence on employee welfare issues and pre-empt productivity or attrition issues, increasing the ROI of these types of international assignments."

Vicki Marsh
 Head of Operations, UK
Equus Software
 London, UK

Virtual Teams, Business Travel and Team Management in a Global Economy

Apart from the times when they are visiting local operations, business travellers are often managing virtual teams. The challenges are obvious; differences in geography, time, language, diversity, culture, size and technology. Based on ideas originally developed in the RES Forum Annual Report 2015, six approaches to deal with this situation and to improve team management are outlined below.

- 1. Tear down communication barriers.** Managing within the constraints of virtual communication, such as WebEx sessions, e-mail writing and Skype sessions, business travellers need to ensure they use their time in the diverse host locations to check and ensure that local staff have understood the working goals and agreed activities. Different degrees of directness and use of context within the language that people are familiar with can distort meaning. Mother tongue speakers often use unconscious or implied meanings in their choice of words or phrases. It is important for non-native speakers to read between the lines. When an English person says, "That's interesting," for example, they might mean, "I doubt whether this suggestion will work." One suggestion to manage this is to use clear, direct language when communicating. Before meetings, the agenda should be circulated as early as possible. This enables meeting attendees to clarify the meaning of words they do not understand.
- 2. Get to know your team and enhance trust building.** International business travellers who manage their dispersed teams need to have the capabilities to understand team processes and to manage these so that trust amongst all team members is built. Create processes and interventions that help identify and bring into the open any misunderstandings. In addition, build appropriate standards and norms so that the team gains an orientation when the team leader is absent and non-routine issues arise. As a leader you can structure work in a certain way so that people can see trust develop through small stages when shared goals are met.
- 3. Create clarity of team objectives and align individual goals.** International business travellers are often in charge of many countries and have to balance global with local issues. Challenges arise when local and global objectives are not aligned. Many stories of a 'not invented here' resistance, or objectives that make little local sense, can be found in the literature. This makes it particularly important to clarify these divergent objectives and to agree personal and professional goals for each team member that can serve local and global interests. International business travellers need to identify team members who display a lack of commitment through not attending meetings. Sometimes, not meeting a deadline can also be an indication of problems in goal alignment.
- 4. Build diverse teams and encourage interaction across borders.** A diverse team composition is the key to innovation in our highly integrated competitive environment. Attempt to construct a team that has a balance of interpersonal styles and a wide set of interests. Strive towards appreciative enquiry and an interaction that is friendly and learning oriented, so as to tap the deep well of ideas and experiences. Encourage the sharing of these ideas across borders.
- 5. Diminish ambiguity through strong leadership.** A dispersed team where business travellers visit only infrequently often needs strong guidance. Many staff do not like ambiguity. Leaders of these quasi-virtual teams need to define responsibilities very clearly. The research of the GLOBE project (House et al., 2001) clearly shows that charisma and vision is appreciated in all cultures.
- 6. Monitor your stress levels, health and overall work-life balance.** There is substantial strain on managers who travel frequently, sometimes routinely flying across continents. Most MNCs are not good at understanding the stresses that this causes in terms of private and family lives, travel and nourishment implications. Subsequently, they often do not formally factor these into performance appraisals and the guidance/coaching of these international leaders. Instead MNCs often seem to expect almost constant work which may lead to burn-out and other health problems (Westman et al., 2008).

What the Experts say

“A recent survey from Yale University identified that 1 in 5 individuals who were highly engaged with their organization suffered burn out. Working in virtual teams or other forms of international work increases the pressure on employees which pushes past exhilaration and into exhaustion both mentally and physically which needs to be recognized. Whilst wellness and resilience training are increasingly being seen as important interventions, there is a real requirement for HR to work with front-line managers to monitor the level of demands they’re placing on their people, as well as the

balance between demands and resources. The higher the work demands, the higher employees’ need for support, acknowledgement, or opportunities for recovery. With the increasing wish of employees to undertake roles that involve international work, caution needs to be exercised to ensure individuals do not over stretch themselves.”

Peter Hawthorne

Senior Consultant

The RES Forum

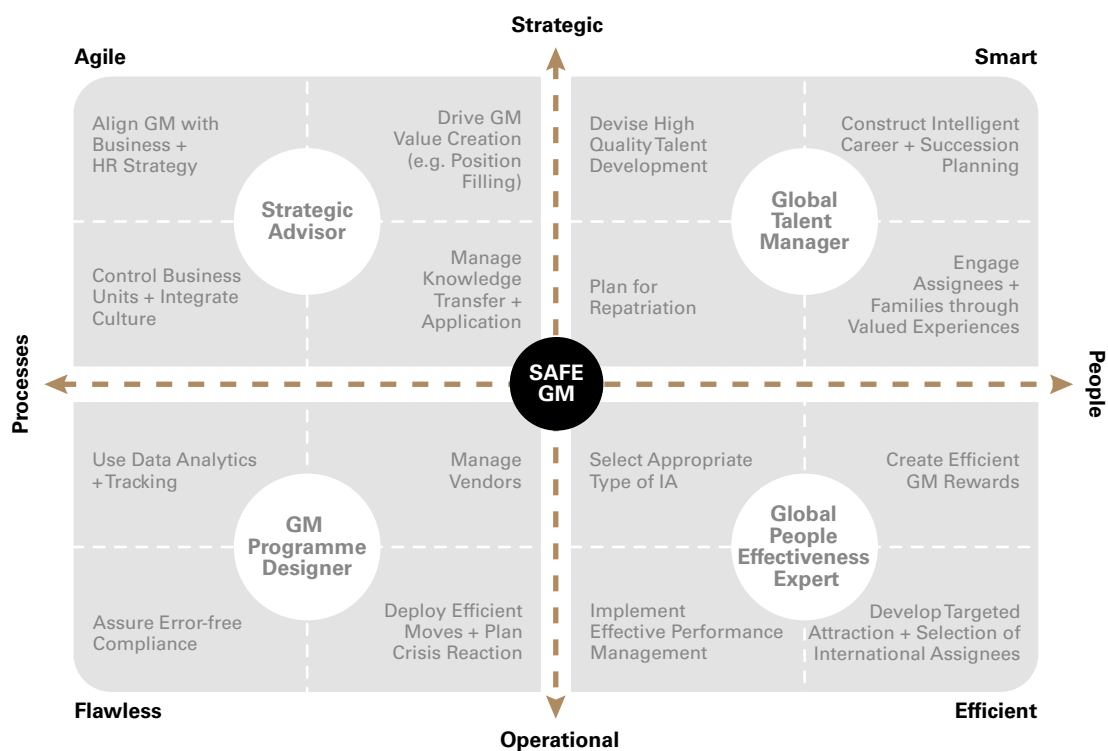
London, UK

There are pros and cons to frequent business travel. Frequent flyers can experience isolation and a loss of family life. In contrast, they often seem to experience rapid career progression and the perks of paid-for international travel to places they might not normally visit. International work is expanding dramatically. The number of people travelling frequently and leading quasi-virtual teams, separated from them by large distances and time zones, is growing. It is paramount to sensitize business travellers and global leaders to the above issues, to train them and to improve this important area of international management.

Conclusions and Learning Points EBT

This part of the report which has focused on non-traditional forms of Global Mobility, has shown that the use of EBT and short term assignments has substantially increased in recent years and is estimated to continue to grow by GM professionals. The SAFE GM model developed in Chapter 1 has some clear implications for mobility departments and organizations that make extensive use of alternative forms of international work. The global people effectiveness expert can explore the motivational drivers and reward approaches that are suitable to engage and enhance the performance of assignees on EBTs, short term assignments and other forms of international work. The strategic advisor role should understand how to use the different types of GM to support business and HR strategies. GM professionals working in the global talent manager role need to fully grasp the career, talent and retention implications that EBTs and short term assignees face. In fact, the link to assignee (and family) experience may be particularly important for alternative forms of global work as some of these experiences may suffer from more frequent disruption, the exposure to several cultures and the increased travel that comes with many forms of alternative global work. Lastly, GM programme design activities need to assure error-free compliance, paired with good tracking and data analytic evaluations that can improve the delivery of GM programmes.

Figure 5.21 SAFE Roles of GM: Purpose, Experience and Value



SAFE GM approaches need to fulfil a clear purpose and provide a good, motivating experience. EBTs experience some challenges in relation to work-life balance and general health issues. Concentrating on understanding EBTs' experiences and concerns, in order to improve how this form of alternative work is being managed, is a key challenge.

While, the likely importance of business travel increases, the RES Forum information has clearly demonstrated that the availability of good data and the management of EBTs could be substantially improved. GM departments need to become more holistically linked to other functions and increase their agility. From the EBT information the following recommendations can be formulated:

- Develop an EBT policy. Only about one in five MNCs have a formal EBT approach which increases the compliance risks. Link it to the business and HR strategy.
- Be clear about objectives and the competencies that EBTs need to be successful. Most often EBTs are filling a project position, aiming for knowledge transfer, fulfilling the normal duties of the position or instigating better control of the host team.
- Distinguish in the selection for general positions that include EBT whether the key goal is inherent in the post (projects/normal work) or whether special competencies are needed (knowledge transfer/control). Set the selection criteria accordingly.
- Implement a formal tracking approach for EBTs. More than half of MNCs (56%) do not track their EBTs formally which exposes them to legal, taxation and social security risks. GM departments need to work towards having high quality tracking information access in order to refine their compliance approaches.
- MNCs need to improve their traditional GM activities with respect to EBTs. A substantial number of firms currently experience EBT tax problems, immigration challenges, payroll issues and social security concerns.
- Go beyond compliance and refine information gathering on EBT issues. Only a minority of MNCs collect information to improve the HR and people management of international workers, ensuring fairness and improving reward structures.
- Manage the arena of EBTs more holistically, including the interfaces to line management. Motivational challenges and health issues such as stress, burn out, long working hours as well as broader health and welfare issues that include stress, loneliness and work-private life spill-over effects are hardly ever managed but represent an opportunity to add value to the GM department.
- Improve the understanding of staff on EBTs and thereby the GM department's people effectiveness expertise. Only about one in twenty companies assesses EBT satisfaction. Yet, exploring the thoughts, drivers, experiences and satisfaction of EBTs may give useful information to develop and refine the overall GM and specific EBT approach in the firm.
- Use more EBTs. The performance of EBTs is either similar to or better than other forms of local or international workers. In addition, in some sense there seems to be a win-win situation in that EBTs, on average, experience more positive career effects than domestic workers.
- Develop an understanding of the value of EBT and its return on investment. Without improved information and better EBT management, the goal to develop better EBT planning and to improve ROI may remain elusive.

Through the research into EBT it has become clear that these international workers represent neglected assignees. Not addressing this imbalance when compared to other GM areas is a missed opportunity to enhance the quality of GM work and the standing of the GM department. MNCs will benefit substantially if they can become more agile, if they can refine their EBT approaches and if they can start to consciously manage these global staff.



Main Survey Data Sources:

RES Forum Survey - Organization Exploring the differences in management of short and long term assignees, November 2017, 60 responses

RES Forum Survey - Management of Short Term Assignees, December 2017, 43 responses

RES Forum Survey - Extended Business Travellers, January 2018, 36 responses

Consumer Technology and the Evolution of Mobility – Personalizing the Employee Experience



Expert view by Equus Software
Vicki Marsh, Head of Operations UK



According to a recent article by HR Dive¹, 55% of HR Managers in the US state that Artificial Intelligence (AI) will become a part of their function in the next 5 years, while 13% already experience it. Compare this to a consumer report from TechCrunch² stating 55% of households will own a ‘smart speaker’ (such as the Amazon Echo, Google Home, Apple HomePod) by 2022 and 16% of households already own one, and we can see that in the wider business world, technology development and adaption may finally be catching up with the consumer world.

Consumer tech has been driving technological development ever since the arrival of the personal computer in the 1980’s. Adapting consumer tech trends to the workplace is widely accepted as more successful in achieving employee adoption and motivation than utilizing specifically developed enterprise technology – or technology developed without consumer trends in mind. Unfortunately, many of us in mobility have long suffered from lack of budget or recognition that mobility-specific technology is required to manage compliance and operations across so many different service areas – from immigration to tax, to relocation and compensation. It hardly needs to be restated that this de-prioritizing of mobility tech has led to low-grade solutions, disconnected databases, basic in-house developed HRIS bolt-ons, and – let’s face it – a fundamental reliance on MS Office applications.

One Size Does Not Fit All

However, for many organizations, the mobility ecosystem is now firmly established and facilitating true data collaboration through digitalization of the mobility network. Advanced data analytics supports evidence-based decision-making as organizations are able to use real-time information and hard facts to support agility in GM. Integration via standard application programme interfaces (APIs) has encouraged the use of specialized companies and apps that focus on doing one or two things really well, rather than striving to do everything but achieving mediocrity at most. HR systems consistently fail to provide sophisticated capability across

generalist HR, Recruitment, Performance & Talent Management, Reward and Benefits, Payroll and Mobility – and as a result, separate refined applications are developing with focus on specific areas – further evidence of how even in mobility, enterprise technology is following consumer tech trends.

Now consider employment changes over time. There are five generations in the workforce currently, ranging from those who remember black and white televisions, to those who have never known life without the internet. The implications of such skills and experience spread are impacting every aspect of current work and life. In recent years, there has been a distinct shift back to focus on the needs of employees in very different ways to the days of legacy generosity in policies. Companies claim to be listening to their employees, appreciating generational variety and delivering more to multi-generational motivations rather than throwing money at them. But is that really true?

Consumerism & Personal Choice

Employee focus has so far manifested in expanded policy suites, direct access to information, user friendly apps, Core-Flex policies and shifting emphasis from mobility team tech to employee focused tools. However, pressure by the multi-generational workforce on current employers is forcing a new level of flexibility, one we see well established in the consumer world. Simple, user-friendly employee elections are becoming fundamental – choices such as cash versus home leave tickets, ‘better’ housing versus more travel, even complete cafeteria plans are now becoming the norm. True flexibility is stretching beyond the business and the traditional core concerns of mobility – those of compliance and logistics, versus an occasional cost-benefit election.

In Chapter 5 ‘Alternative Forms of International Work’ we are seeing that the lines are blurring between business travel and international assignments, just as we see the lines blurring between work and personal life. Employee demands are becoming more personal – stretching beyond traditional compensation and benefits. New workplace demands include ‘bleisure’, or tagging personal trips on to business travel, complete flexibility over vacation time and strong demand for cutting-edge software and mobile devices to work with on a daily basis; anything less and your millennial talent will think twice about coming to work for you. On the other hand, Gen X and Boomers are more likely to request work from home and flexible schedules to support their work-life balance and family demands.

Employee Well-Being & Happiness

Now that evidence-based decision-making is firmly established in mobility, the mobility ecosystem could be extended – leveraged to bring further data insights on employee opinion and wellbeing into the mobility ‘bigger picture’. Stress levels, work-life balance, even loneliness and depression are often addressed through impersonal awareness campaigns in larger organizations, but there is a failure to link well-being and happiness to direct demands of the job. How much do organizations really know about how their employees feel about being on the road continuously, or travelling without their families? What are the direct impacts of cost control on travel policies, such as travel class cut-backs, forcing employees to travel multiple times per week on budget airlines and use public transport for the sake of cost over convenience? In a world of five star and smiley-face selection, I suspect airport security has better informed data on employee happiness than most companies.

As full compliance and operational excellence become easier to obtain, it is no longer attractive to provide compliance over experience, it is essential to provide flexibility and personal choice. In the broader HR world, low cost solutions such as robots and AI are already replacing humans in the process where it makes sense – utilizing chat bots, virtual accommodation tours and self-driving trucks to name a few. The next generation of technology offers an opportunity to combine compliance and logistics data with point-in-time pulse checks and employee feedback solicitation, and soon clever AI will link such feedback exercises with previous choices and responses – true personalization in the manner of merchant recommendations (the ‘you might also like...’ approach to advertising).

Humanizing GM

From a technology perspective, platforms must be up-to-date and capable of true data collaboration – utilizing the latest in standard APIs to connect with multiple mobility services. They must also be simple yet sophisticated enough to future-proof your programme by allowing flexibility – functionality and service area add-ons, eliminating barriers to the changing nature of mobility, supporting what Accenture terms ‘frictionless business’³. The natural progression of ‘consumerizing’ mobility technology is that it enables GM to focus human interaction on especially emotive services such as providing personalized briefings and conducting housing, school and area orientations once the assignee is in a location. Mobility has the opportunity to at least keep up with the wider HR world – but we need to be speedy in order to be agile – the pressure is on to tool-up for the future with flexible technology that leverages consumerism and offers choices that speak across the generations.

About Equus

Equus Software is the global leader in cloud-based international relocation and mobility solutions. More than 300 organizations around the world rely on Equus tools and technology to automate mundane, transactional work so that Global Mobility teams, talent management professionals and other key stakeholders can focus on adding value to the business. Founded in 1999, Equus has a proven track record for delivering cutting-edge talent mobility solutions, continuous innovation and exceptional customer service.

www.equusoft.com

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Learning Lab

RES Forum's Brand New Virtual Education Programme

Developed in partnership with Knowledge Anywhere, to help GM Professionals become experts in Global Mobility (GM), the curriculum covers the following aspects of Global Mobility and International Relocation:

- Mobility overview
- Assignee journeys
- Employee compensation
- Compliance

Each module includes an assessment to ensure understanding and drive engagement.

For participants who want to take their Learning Lab experiences to the next level, 'RES Accreditation' is a valuable supplementary part of the programme, assessing and providing formal recognition of the knowledge you have acquired on completion of the Learning Lab programme. As part of the supplementary accreditation you will be measured on application of your learnings from the programme with respect to a challenging but real life GM case study.

Training for Internal & External Teams

The course is designed for, in-house GM and HR Support Functions and in-house Shared HR Service Centres, International Relocation Services Suppliers. Although pitched at entry level, the course is far from basic – in fact some of our most experienced members failed the tests (we promised to not share any names!)

What participants learn

Participants will obtain a better global understanding of processes, and their roles and responsibilities within them:

- Improving understanding of the relocating employee experience throughout the process
- Enhancing overall skills, technical knowledge and understanding of best practice
- For vendors in the mobility value chain, better understanding of the voice of the customer, to help improve client relationships

The course examines mobility from the assignee perspective therefore enhancing the users' understanding of the employee experience, as well as technical areas of compensation and compliance. It also provides a cost-effective solution for specialist subject training on the complex area of Global Mobility.

RES Accreditation

RES Accreditation is the industry benchmark in taking HR and GM professionals beyond the basics of Global Mobility management and allowing them to demonstrate their understanding of mobility and HR concepts in practice.

The RES team send candidates a mobility case study and require that they prepare a recorded PowerPoint (including audio) or a video presentation, which builds upon the knowledge acquired through the Learning Lab. The presentation is then sent to our qualified assessors, who are, without exception, current or previous Heads of Reward or Global Mobility.

The assessment will result in either pass or fail – with a pass rate of around 70%. Successful candidates will become 'RES Accredited Class of 2018' and will receive our logo and business card templates for use on their business cards, their email signature and on their LinkedIn profiles. They will also appear in our public 'Hall of fame', allowing employers and clients to see when accreditation was achieved.

Whether pass or fail, candidates will receive a feedback summary of their submission.

To find out more click [here](#)



Our network includes the knowledge & experience of over 1,500 in-house global mobility and HR professionals

With their help we've created our virtual education programme on Global Mobility, the **RES Forum Learning Lab**

Understand what really matters for in-house global mobility professionals and service providers, by visiting www.theresforum.com/learning-lab/

LEARNING LAB RES FORUM
INNOVATION • EDUCATION • PARTICIPATION

The RES Forum Learning Lab - Register now

Thank you to all RES Forum Members...

... from the following companies, who took part
in the research for this year's RES Forum Annual Report.

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Colophon

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