

Mastering **New Work** with

SAFE (R)

GLOBAL MOBILITY

BY PROFESSOR MICHAEL DICKMANN
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INTRODUCTION

In our 2018 Annual Report, we developed the SAFE Model to depict and refine the demands on Global Mobility (GM).

Distinguishing strategic and operational, as well as process and people dimensions, and with 40 recommendations to shape the key GM areas, it has become one of the leading holistic GM models in the field. However, COVID-19, geopolitical developments such as the war in Ukraine, climate change with its strengthened focus on sustainability, as well as other challenges to the volatility, uncertainty, complexity and ambiguity (VUCA) that characterize business have triggered substantial changes in how organizations visualize and operationalize GM.

The RES Forum and we, as academics who are highly interested in the field, have since conducted dozens of interviews and multiple surveys to understand the changes and their impact on GM. Overall, our findings lead us to believe that now is the time to reassess and refine the SAFE model.

In this report, we share the updated model, while reflecting on the evolving world of 'New Work'. We depict a GM arch to Talent Management, outline how GM can co-evolve with Global Talent Management and sketch the ways that GM professionals can actively shape the post-pandemic approach to global work. In so doing, we do not just refine and further specify our original insights, but we also rebalance our model to demonstrate how resilience is occupying a stronger and more central role.

GLOBAL MOBILITY – A NEVER-ENDING GAME OF WHACK-A-MOLE

BY NICKY TAYLOR, HEAD OF CORPORATE
GLOBAL MOBILITY AT NESTLÉ

As the world emerges from the uncertainty and volatility of the last few years, GM functions are feeling the pressure. Nothing new there, mobility teams have always been under pressure, right? Well yes. Perhaps we didn't appreciate it at the time, but on reflection our biggest challenges used to be how we would align talent and mobility, or how we could best measure return on investment. These, along with a sprinkling of business traveller compliance - plus Brexit - were the hot topics of industry conferences and seminars, and seemed to be the nuts that none of us could really crack. Nowadays, it feels more like a never-ending game of "whack-a-mole" on a scale that would've been hard to imagine five years ago. All the pre-pandemic themes still exist, but there are new and mounting challenges and complexities being thrown at GM teams around the world on what feels like a daily basis.

ARE WE READY FOR CHANGE?

Everything has changed since COVID-19 graced our shores. And continues to change with the geopolitical events that keep unfolding. Employee appetite for international career experience still exists. Perhaps with more wariness than before and definitely with increased demands on flexibility for personal situations, as well as a stronger expectation that expatriation really will be the career accelerator it is sold to be. Again, nothing new (or wrong) here. Living and working abroad should enhance an employee's personal and professional life, but it means that global mobility teams must reflect on whether their policies and operating models are delivering on this, given the evolving external context.

Business appetite for mobility has shifted too. Local talent pipelines are stronger these days, and the need to send an expensive expat is under greater scrutiny when home-grown talent is more readily available, often at a lower cost, in many jurisdictions. Industry surveys consistently reflect growing demand for shorter-term or project-based assignments, suggesting mobility is increasingly used for development purposes. So, while GM was previously all about taking the people to the work, it's also important to see how we're able to take the work to the people. Are we really ready to drive this forward?

KEEPING A HUMAN APPROACH

There are too many changing and diverging elements pushing down on mobility to call them and their impacts out individually, and some will be more significant for some organisations than others. However, ensuring our GM policies and practices enable the business, meet compliance requirements, respect cost pressures, and support the talent agenda - all while grappling with this new world of work - is a nice ask of GM. I'm sure most mobility functions are embracing this with an equal share of enthusiasm and overwhelm.

The updated SAFE(R) Model from the RES Forum highlights the multiple facets required of a GM function. These are no longer nice-to-haves; they are essential elements for managing an effective, and resilient mobility function. The self-assessment tool is a great way to reflect on whether there is a need to take a sharper focus on any particular area. GM has always been a microcosm of other HR areas as it spills over into resourcing and recruitment, talent management, and compensation and benefits. The eight roles defined by the SAFE(R) model quite rightly also underline overlaps with finance, compliance, legal, tax, and IT teams.

On top of reflecting on whether our GM functions offer the right balance of Smart, Agile, Flexible and Efficient, we must keep a human approach front-and-centre to everything we do – including how we manage our mobility teams. Many mobility professionals are living abroad themselves. Many have had their own heart-breaking experiences with COVID-19 or various conflicts. Many are still smiling through these trying times.

OUR RESILIENCE WILL SERVE US WELL

So yes, mobility is under pressure. And yes, we need to pay attention to our ability to weather these storms. But we should also be proud of what has been achieved and overcome in light of this additional pressure. After all, our innate resilience stands us in good stead to face and manage whatever mole needs whacking next.

FIGURE 1: THE ORIGINAL SAFE GLOBAL MOBILITY MODEL



THE SAFE MODEL

IN LIGHT OF A TURBULENT FIVE YEARS

Our interviewees – senior leaders in GM and / or HR – argued that combining Strategic, Operational, Pre-departure, During global work and Post-return perspectives, as well as Individual, Team, Leadership, Family and other organizational concerns has been a key step towards successful GM.

While the SAFE Model provided a complex picture, it allowed more thoughtful, balanced and focused work in leading the GM function.

The last five years have witnessed substantial challenges that have significantly and, perhaps, permanently impacted the world of work – including global assignments and other international activities.

COVID-19 led to the mass global uptake of virtual work, as well as other forms of technology-aided remote work. This remote and distributed approach has many upsides with respect to agility and costs. At the same time, it has several downsides, in terms of individual wellbeing and effort, team cooperation, and organizational culture and cohesion. To name but a few, issues such as trust, engagement and technological monitoring have become important.

The Ukraine war pushed security, supply chain and resilience challenges to the fore.

Climate change has made sustainable HR and global work, including travel issues and ethical concerns, a major challenge for many people.

Over this period, the RES Forum provided several reports to offer more insight into these challenges from the point of view of GM leaders. You can download them, here: theresforum.com/annual-report

Our research allowed us to complete a SWOT analysis of the various on-going changes in the GM field. A SWOT analysis is a strategic planning tool that identifies and assesses the Strengths, Weaknesses, Opportunities, and Threats (hence SWOT) related to business competition, project planning, or in our case, GM.

Strengths are the characteristics of GM that give it an advantage. Weaknesses are characteristics that place GM at a disadvantage. Opportunities are elements that GM could exploit to its advantage.

Threats are environmental conditions that could cause trouble for GM. By understanding these four aspects, the SWOT analysis allows organizations to take a comprehensive look at their internal capabilities and external environment regarding their GM operations, providing a foundation for decision-making and strategic planning.

Figure 2 presents the results of our SWOT analysis of GM as the world adjusts to a period post COVID-19.

<p><u>STRENGTHS</u></p> <ul style="list-style-type: none"> • Local ideas get implemented and diversity is more appreciated • Acceptance of digital working • Local staff leads / executes activities and gains more attention • More sustainable resource use through less travel and more technology use 	<p><u>WEAKNESSES</u></p> <ul style="list-style-type: none"> • Compliance and risk management needs a more granular understanding (e.g., of staff location and competencies) • Health and well-being of staff working 'at home' / cultural issues for organizations and 'new recruits' • Knowledge and skills gaps in some units need to be identified to be able to fill these remotely • Emerging GM resourcing issues
<p><u>OPPORTUNITIES</u></p> <ul style="list-style-type: none"> • Rethinking the Future of Working and Living • Enhanced (reverse) knowledge transfer • Centre – local collaboration is viewed as fairer and more motivational • More agile staffing patterns: skills-based rather than job-based GM 	<p><u>THREATS</u></p> <ul style="list-style-type: none"> • Re-designing interfaces between GM and Talent, GM, and line managers • Change in power structures and working relationships • Effects of dispersed work and social isolation – 'we are social animals, not anonymous production robots' • Resilience issues along the whole work process • Global leadership and cultural/ operational cohesion of the organization

FIGURE 2: SWOT ANALYSIS OF RECENT GM CHANGES

SO, HOW DOES THIS ANALYSIS FEED INTO THE FUTURE OF GM?

Some of the core, expanded demands on GM professionals and the GM function run parallel to the challenges that HR experts need to master. In essence, GM leaders need to be strategic contributors who efficiently manage change, make strategic decisions, and understand the very nature of competition and their own business's advantages in an environment where customer, competitor, societal and shareholder requirements are rapidly modifying. This means that they must build capabilities through GM that support the business, including closer alignment with talent management and operations. Indeed, the need to drive organizational culture towards a positive vision has been highlighted.

More recently, issues of Artificial Intelligence (AI) and its (legitimate) use in work have been at the forefront of the public discourse. Having said that, using appropriate technology to enhance quality, reduce costs, and increase speed have been one focus of GM experts for many years. AI can, to a certain extent, be considered the next iteration of this process. Obviously, this went hand-in-hand with the ability to understand, implement, interpret, and use analytics to advance GM, while using modern media to enhance GM cohesion and culture. Much focus went to building the international talent that the organization needs – justifiedly so. Especially at the beginning of the COVID crisis, GM had a glorious chance to become an employee champion to look out for the many health, safety and wellbeing demands on assignees and their families. Many organizations rose to that challenge and GM was rewarded with an enhanced reputation.

Lastly, one particular role has become much more important: that of the navigator at the centre of GM. There are many potential paradoxical pressures on GM professionals, including cost savings and quality improvement, speed versus reliability and sustainability, global talent versus local use of resources and resource investment, compliance and legal certainty versus some opportunity exploitation. There have always been individual, departmental and organizational interests that may not be in tune. Diplomatic leadership that transcends these tensions is increasingly important.

SAFE TO SAFE(R)

BY DAVID ENSER, PARTNER AT THE RES FORUM

International Human Resource Management (IHRM) and cross-border staffing practices have been profoundly impacted by recent geopolitical crises and the global COVID-19 pandemic. In this dynamic landscape, it is imperative that these practices evolve to become more resilient. The RES Forum's SAFE(R) model - Smart, Agile, Flawless, Efficient, and Resilient - provides a comprehensive framework for achieving this goal.

Smart practices in IHRM involve leveraging technology and data-driven decision-making to enhance recruitment, selection, and talent management processes. With the rise of remote work and digital collaboration tools, organizations must be adept at using technology to connect with a global talent pool. The ability to harness advanced analytics for talent forecasting and identifying skills gaps is crucial in navigating uncertain geopolitical environments and disruptions caused by pandemics.

Agility is paramount in the face of geopolitical crises and unforeseen events like the COVID-19 pandemic. Organizations must be prepared to swiftly adapt to changes in regulations, travel restrictions, and market conditions. This necessitates a flexible approach to staffing, allowing for quick adjustments in workforce composition and location. The SAFE(R) model emphasizes the importance of developing contingency plans and scenario analysis to anticipate and respond effectively to disruptions.

Flawless execution in IHRM involves streamlining administrative processes, ensuring compliance with local regulations, and providing seamless support to international employees. This includes managing visas, work permits, tax compliance, and other legal requirements. By establishing clear guidelines and efficient workflows, organizations can minimize administrative hurdles and maintain compliance, even in challenging geopolitical contexts.

Efficiency in cross-border staffing practices is crucial for optimizing resource allocation and minimizing costs. This involves evaluating the cost-effectiveness of various staffing models, including expatriate assignments, local hires, and virtual teams. Additionally, implementing lean and standardized HR processes can lead to significant efficiencies. The SAFE(R) model underscores the need for continuous process improvement and a focus on resource optimization.

Resilience is the cornerstone of adapting to and recovering from geopolitical crises and global disruptions. It encompasses building a robust organizational culture that fosters adaptability, openness to change, and a strong sense of purpose. Resilient organizations invest in employee development and well-being, recognizing that a motivated and agile workforce is essential in navigating uncertainty. The SAFE(R) model emphasizes the importance of building a culture of resilience from the leadership down to individual team members.

In the context of the recent geopolitical crises and the pandemic, the SAFE(R) model provides a holistic framework for enhancing the resilience of IHRM and cross-border staffing practices. By integrating smart, agile, flawless, efficient, and resilient elements into their strategies, organizations can better navigate the challenges posed by geopolitical uncertainties and global disruptions.

THE SAFE(R) MODEL:

GM PROFESSIONALS AND THEIR NEW COMPETENCIES

Given all these developments, we feel the time is right for a new iteration of the SAFE model. Our research and the expert interviews over the last five years have shown that the SAFE Model is a highly useful tool for GM leaders.

However, we have also found that the model needs to be refined to remain valuable and up-to-date. Therefore, we have built on the original SAFE Model and split each of the four areas into two further sub-dimensions to integrate new developments in the changing world of work. To enhance usability, we summarize the key elements and considerations below:



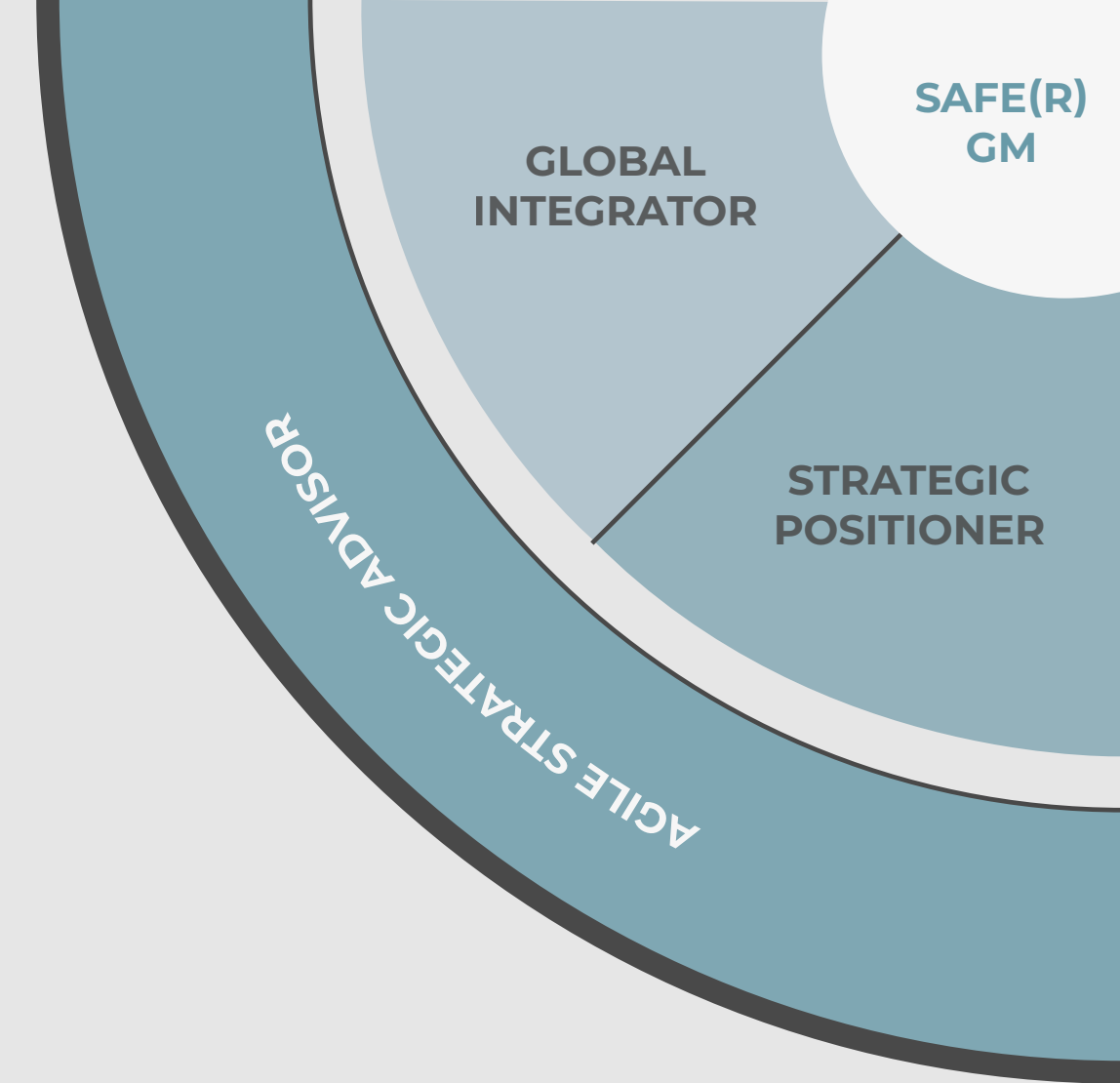
A . A G I L E S T R A T E G I C A D V I S O R

STRATEGIC POSITIONER:

- Global Business Expert: develop in-depth insight into how to align GM with global business and HR strategic objectives
- Visionary: envisage the future of global work integrating the mobility of work, people and hybrid approaches
- Decoder: understand purpose and expectations of assignees, business travellers and talent working across borders.

GLOBAL INTEGRATOR:

- Connector: liaise effectively between talent management and emerging global work patterns.
- Coach: advise line managers and global workers as to the specific challenges and support mechanisms to increase the chances of effective global work and wellbeing
- Coordinator: Aid trustful cross-border collaboration between global and local talent management



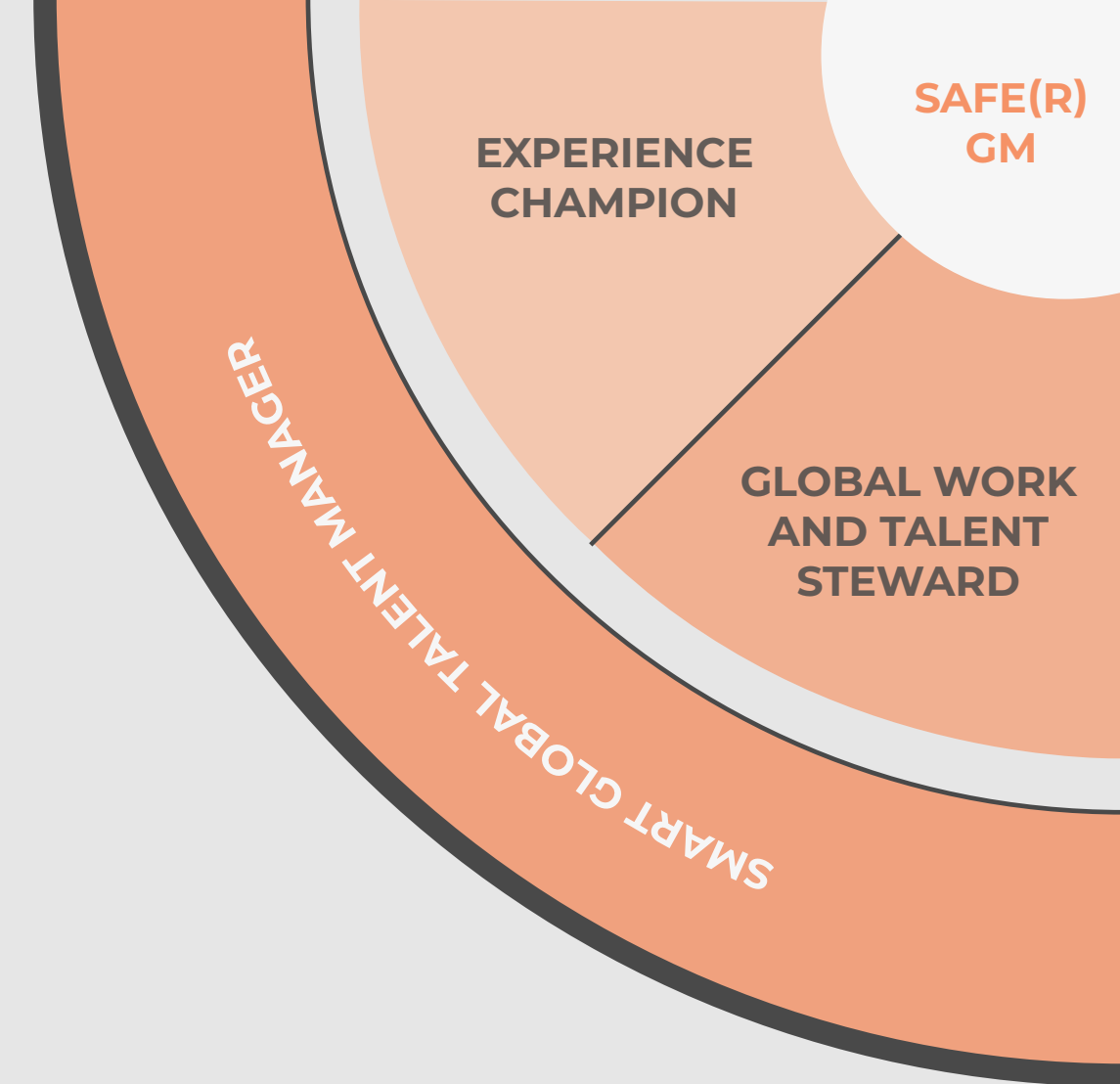
B. SMART GLOBAL TALENT MANAGER

GLOBAL WORK & TALENT STEWARD:

- Talent Development Co-Designer: advise and coordinate global talent development activities with talent management specialists
- Constructor: shape intelligent global careers within the new post-COVID-19 normal. Help to plan the location of work and people, understand working patterns and give input into the development of effective international career and succession systems.
- Planner: devise the impact of physical relocations and identity shifts connected to global work. Sensitize individuals and teams to operational implications.

EXPERIENCE CHAMPION:

- Experience Assessor: understand the implications of global work for the health and wellbeing of staff. Evaluate which experiences are valued by assignees and other global workers and how the organization can extend more support.
- International Team Advisor: Raise ideas and create support policies and practices that help global workers feel welcome and appreciated by their co-workers and host teams to help them thrive.
- Family Supporter: be sensitive to the needs of families, partners and other significant others of global workers, whether they work in a host location, travel to it or simply interact across borders.



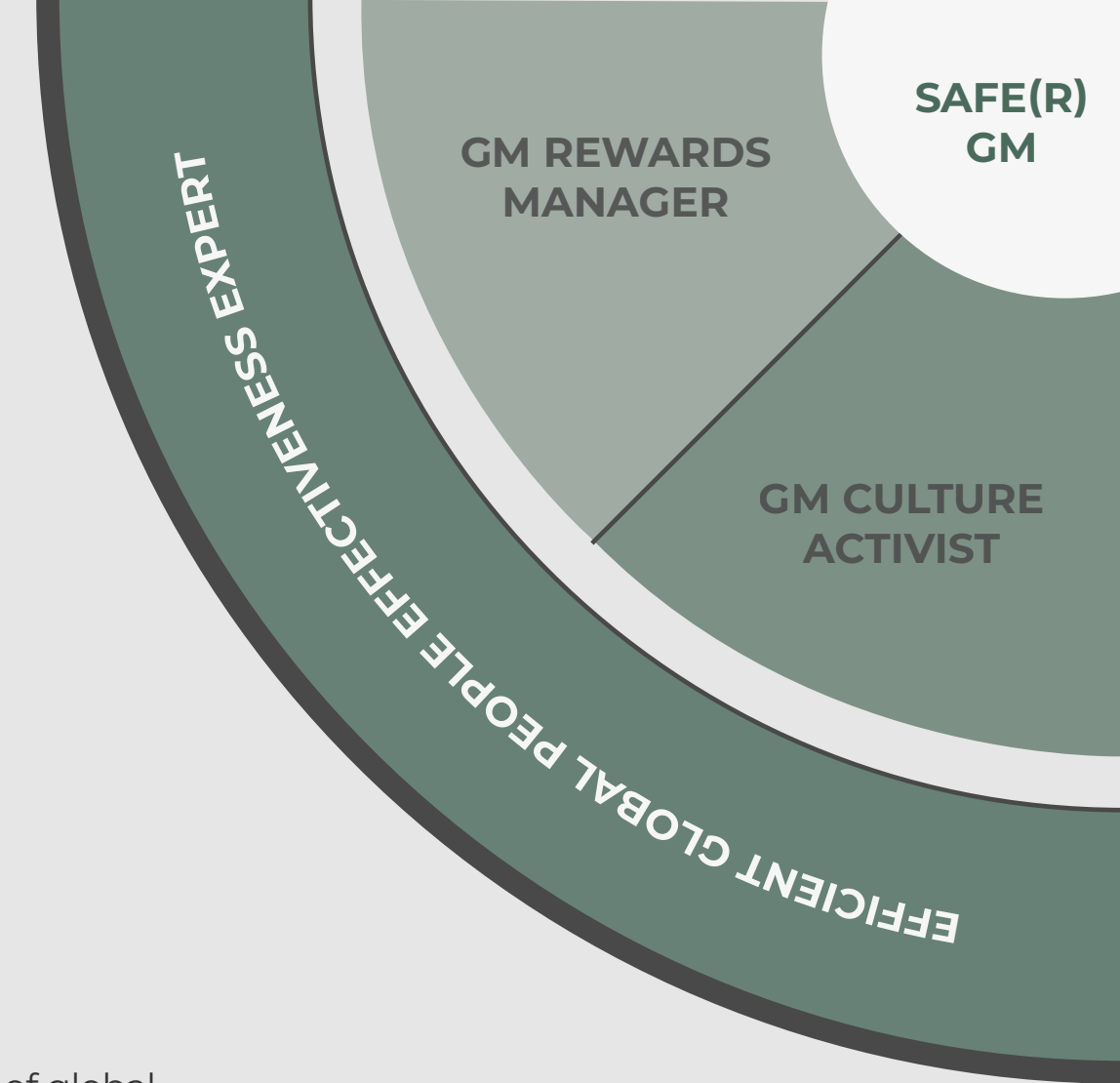
C. EFFICIENT GLOBAL PEOPLE EFFECTIVENESS EXPERT

GM CULTURE ACTIVIST:

- Influencer: shape the GM culture so that global work is an attractive proposition even in the potentially more demanding world of New Work
- Designer: configure the selection for global work so there is good talent, job demands and cultural fit
- Match-Maker: choose the right match between talent interests, global job demands and work climate in the post-COVID world

GM REWARDS MANAGER:

- Global Rewards Steward: create efficient GM reward approaches that distinguish and incentivize different forms of global work
- Global Performance Assessor: develop performance management ideas and approaches that lead to increased fulfillment of
 - global objectives
- Engagement Facilitator: draw up flexible reward approaches that take account of the shifting risk landscape and personal threats in a post-COVID world



D . F L A W L E S S G M P R O G R A M D E S I G N E R

COMPLIANCE ARCHITECT:

- International Compliance Professional: understand local and international regulatory requirements and ensure business and individual compliance
- Vendor Manager: evaluate business needs, select, cooperate, monitor and assess appropriate global service providers.
- GM Technology Integrator: develop insights into existing GM technology and how it can serve the company's interest as well as how it can be combined with existing organizational technology.

GM RISK & DATA ANALYTICS EXPERT:

- Analytics & Risk Assessor: use AI and other technologies to identify analytics that can improve the GM management process and that can augment GM and business objective achievement. Assess and manage risks associated with global work.
- Tracking Specialist: monitor where work is taking place and where employees are located to give flawless data to compliance.
- Crisis Response Planner: draw up contingency plans for a variety of physical, psychological and institutional dangers to ensure individual duty of care and organizational business continuity.

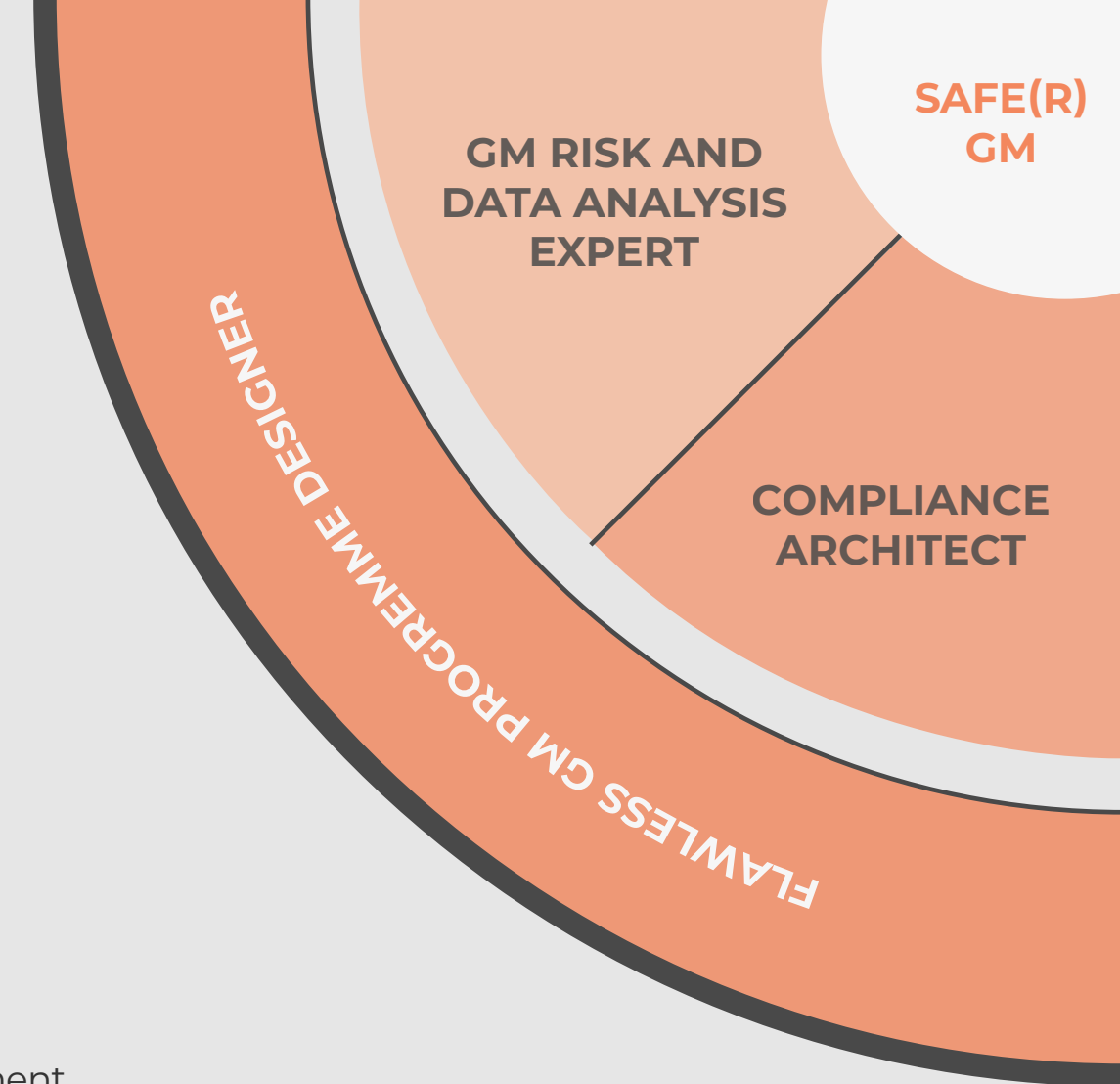


FIGURE 3: THE SAFE(R) NAVIGATOR ©
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Our main extension of the model lies at its core, i.e., the SAFE® GM Navigator.

The SAFE(R) GM Navigator, in the center of the model, outlines some core leadership behaviors and thought patterns that are essential for GM success. First, it has become abundantly clear how important resilience is for the organization in times of health, climate change and geopolitical hostilities. The next crisis – maybe even involving one or more of the superpowers such as China and the USA – maybe just around the corner.

In each of the four key areas – involving strategic agility, smart talent management, flawless GM program design and processes, as well as efficient global people effectiveness – corporate GM resilience, risk management, and leadership (on both strategic and operational levels) are essential.

That said, external and internal developments are not just important with respect to resilience, but also in terms of balancing priorities. This has become clear in our conversations with GM professionals and our research over years since we introduced the original SAFE model. Corporations are well advised not just to react to external shocks (such as climate change), strategies and operations of competitors, physical hostility (such as COVID-19), terrorism or other (such as psychological or institutional threats). There are also several internal tensions and paradoxes.

Examples include:

- Managing tensions between global and local operations and their diverging interests
- Managing interfaces to Talent Management; Finance; Line Management
- Managing the balance of the need for change and stability
- Managing routines (efficiency) and the need to embark on something new
- Managing divergence of organizational goals and individual interests and engagement
- Managing the emerging hybrid forms of global work.
- Managing the promise of new technology (including AI) and the willingness and ability of staff to cope with such rapid change

Therefore, the SAFE(R) GM Navigator at the center of the model is a key role that will determine the effectiveness of processes and systems, and operational and strategic GM approaches. We believe that it will make not only a difference to the GM success of an organization but also to many individuals, their family and society at large.

SELF-ASSESSMENT

OF YOUR SAFE(R) APPROACH TO GM

Embarking on a journey of self-improvement in GM demands a clear understanding of where you stand today and where you aspire to be. Our innovative self-assessment tool, designed around the 8 Focus Areas of GM, offers an intuitive way to visualize your current position and future ambitions.

By creating a spidergram (radar chart), you can compare your present competencies against your ideal targets, whether for today or your vision for two years from now. To complete the tool, simply consider, for each dimension, where your organization stands today and where you want to see it in the future. Using different colours for today and in the future, dot the respective points and connect the dots.

RES FORUM



How effective do you think your GM leadership is in relation to SAFE(R) GM Navigation? What would you need to do to strengthen your resilience planning/operations or the way that your GM leadership deals with the key internal and external tensions they face?

Each of the eight areas is accompanied by detailed descriptions (please see the sections in the report), enabling you to assess what's most important to you or to strive for a balanced position across all sub-areas. The visual representation of your GM profile will highlight the three most significant gaps, offering a tangible roadmap for development. By identifying these disparities, you can construct actionable steps to bridge the gaps and align more closely with your ideal.

This tool not only fosters self-awareness but also empowers you to become a proactive agent in your own growth within the ever-changing landscape of GM. Your future in GM begins with a clear picture of where you are and where you want to go - and this tool is your compass.



IN ASSOCIATION WITH...



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We support companies and their employees during the entire process of relocation. Our aspiration: a first-class customer experience. Our promise: the perfect interaction of intuitive, efficient technology, personal support and flexible service selection. Whether via our app or our platform, we find the best consultant for your employees. At the same time, we provide our GM clients with an updated overview of employee relocation status and other useful data. People are at the centre of all our actions – we focus on fairness towards customers, employees and partners. This is how we set a new standard in the people mobility industry.

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As part of Gallagher Multinational Benefits and HR Consulting, our Global Mobility advisory teams are specialists, who can help clients translate intent into practice, by simplifying the complex, fast moving, costly and time-consuming world of Global Mobility. We work with our clients to identify opportunities for implementing the most practical approach for their company when redefining and developing agile strategies.

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The RES Forum has the tools, knowledge and community to help mobility professionals keep pace with changes in the industry, and help the industry keep pace with the needs of mobility professionals.

Through research, analytics, eLearning, events, and policy templates & consultancy, we provide support and guidance to help mobility professionals navigate the ever-changing GM landscape.

We enjoy the exhaustive knowledge of our consultants, academics, Strategic Advisory Board and Technical Partners, as well as our international community of senior in-house HR and GM professionals, which includes 1,000 members in over 45 countries.

In conversation with leaders and experts from across the industry, our academics study the most pressing topics within the world of GM and cross-border working. Then we share their collective insight to provide clarity, tools and advice to help our members through the many challenges they face.

The RES Forum is an independent organization. We are not influenced by external parties or third-party vendors.

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*WITH THANKS TO EVERYONE WHO CONTRIBUTED THEIR INSIGHT AND KNOWLEDGE.
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NOTES...