



World Mobility Perspectives

# Mobility Trends 2023

From agility, to sustainability

*How the world works better*

**CROWN**   
WORLD MOBILITY

# Foreword

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If the past few years have taught us anything, it's that agility in the world of mobility is vital. Covid shook our industry to its core, yet 2022 saw further crises add to the already turbulent international mobility landscape.

From Brazil to Hong Kong, political upheaval created pressures on businesses with assignees in these locations. Add to this the chaos unleashed by the war in Ukraine, continuing Covid restrictions in China and soaring international rates of inflation, businesses have continued to deal with enormous challenges in ensuring the safety and productivity of assignees around the world. We, as mobility experts, have had to react quickly.

This year, for our annual trends analysis, we have spoken to various experts from within the Crown World Mobility team, along with our client Deloitte's internal Global Mobility Team. They have shared their views on some of the biggest challenges they are seeing and predicting this year – and ways global mobility experts can respond.

Here's to a less turbulent year!



**Caitlin Pyett**

Director of Account Management,  
APAC and Consulting Lead

# The need for agility in mobility

by Nick Sutton, VP Global Sales & Marketing



Crown World Mobility's **2022 trends report** explored the ways in which Covid had driven both instability and creativity in the global mobility industry.

While the pandemic gave rise to significant changes, with new approaches to remote working, an increased focus on assignee wellbeing and significant turmoil in immigration regulations, mobility teams were called upon to react creatively to the onslaught of challenges they were faced with. At times it seemed like instability had become the new normal.

But I think the industry can pat itself on the back for the creative and innovative ways in which it responded. This has certainly been noticed by senior leadership teams in businesses – mobility teams generally now have a “seat at the table” and an enhanced profile within their organisations, but this has come from necessity rather than a natural evolution of the role. The resulting knock-on effect for mobility specialists is a whole raft of new skills required in order to succeed and thrive in the industry, and a need for agility.

## A shifting skillset

Mobility specialists have long been required to have a varied set of skills, both technical and 'soft'. On the technical side, the focus on ever-changing immigration regulations, along with the impact of remote work on tax compliance for the company and the individual, has meant that gaining a rounded and broad understanding of potential pitfalls is more vital than pre pandemic. Those who have not found their way to mobility via the expat tax or immigration consultant route, need to be on their toes to ensure they can hold their own when dealing with these subjects – and a holistic view of assignment compliance from both angles – immigration and tax – is essential when defining remote work policies and governance.

On the soft skills side, in addition to the endless list of asks that have always defined the mobility specialist, being able to pivot quickly to address an unfolding situation is now a necessity. For those of us who remember global mobility in its earlier incarnation of “expatriate management” – when your job was simply to get someone from A to B without incurring any liability – this is now a distant memory. From dealing with the pandemic, to being on top of ever-changing legislation or operational issues, along with actively and creatively solving problems, the ability to think outside the box and deal with uncertainty is vital to anyone coming into this industry.

As the world continues its headlong drive towards globalisation, and with new generations coming to the workforce expecting, and in some cases demanding, international exposure and experience, fundamental shifts are occurring in mobility that have turned mobility on its head.

The good news is that mobility is becoming a fully embedded part of corporate culture in the 21st century. What remains uncertain is how this is going to play out in our day to day working lives. The ability to be agile, responsive and innovative continues to define what it means to be a mobility specialist in 2023, and most likely, beyond.



***When vast swathes of the working population work from their front rooms rather than their desks, assignments can be virtual, and countries actively compete for digital nomads, the question arises – what does global mobility even mean these days and what will it mean in 10 years?***



# Responding to global, macroeconomic events



by Roberta Carnaccini, Global Operations Director,  
Immigration Services at Crown World Mobility

Immigration policies around the world have never witnessed as much turmoil as they have in recent years. Covid, Brexit, the war in Ukraine and high rates of inflation are just some of the political and economic issues which have driven immigration policy change. Additionally, ever-shifting societal changes are carving out new immigration approaches around the globe.

A significant change we have seen at Crown recently has been a shift in attitudes towards changing family dynamics, including an increase in main applicants being women, as well as same sex couples.

In Hong Kong, for example, visas for same sex partners were introduced in 2018, which has certainly had a positive impact. We have noticed an increase in same sex couples relocating here as a result, and although this rise has been gradual, it is still significant, as these people previously did not have the ability to move here or experience this country's culture before 2018.

Furthermore, look at mobile populations now and you will see women in senior roles across the world, travelling alone or with children, sometimes with male "accompanying partners"

or unmarried partners. Some have stepchildren or extended families, and others a same-sex partner. Younger generations' priorities, along with changes from the traditional family model of the past and the expectation of fairness, equality and diversity are driving immigration policy evolution. Of course, this varies by region, but change seems inescapable – in APAC, for example, there is now some acceptance of same sex partners for dependent visas in Australia, New Zealand, Taiwan and Hong Kong (from 18.9.2018).



***The influence of DEI, accompanied by increasingly liberal immigration approaches, can in fact make placing assignees overseas more complex to manage... but for assignees it's great news - opening up opportunities which previously did not exist.***

It's impossible to talk about societal changes impacting the working landscape without turning to the issues of remote working (more on this in our next trend!), work from anywhere, virtual assignments and digital nomads. So how have immigration laws and regulations around the world kept pace with these changes?

Whether being temporarily assigned to an international role, team, or project without ever travelling for the assignment (a virtual assignment) or offering the ability to temporarily work from outside of the contracted location (remote working), companies are becoming more familiar with the complexities that come with these approaches and the associated immigration categories to make them possible, which vary wildly around the world. Currently, 49 countries offer digital nomad visas, with EMEA and the Caribbean leading the way, but opportunities in APAC are much more limited. Overall, however, immigration authorities globally have been very slow to react to the changing work-related environment and visa options have not expanded to provide compliance to those wishing to work remotely or from anywhere. As a result, we have observed that companies with low-risk thresholds are not adopting remote work policies; and those that are, are limiting flexibility by requiring their employees to have permission to work in the chosen remote location prior to requesting the arrangement.

2022 has also brought with it some significant global macroeconomic events that are impacting immigration. One such is the war in Ukraine, which has prompted many businesses to move their operations away from Russia and, for some, produced a mass move of Russian nationals out of their country. At Crown, we have made applications for 136 Russian nationals to leave the country and work elsewhere since the Ukraine invasion last February.

Similarly, Ukraine-based operations for some companies had to cease and Ukrainian nationals have been received as refugees around the world. The EU was swift to implement rules to welcome Ukrainian nationals into their territories and, in most cases, also grant them the right to work. For Russian nationals, the EU was at first split, granting fast-track visas or banning them completely from entering, until the entire EU declared tighter rules for those nationals.

As a result of these policy decisions, a backlog in immigration applications across Europe due to the sheer influx of Ukrainian refugees led to the delay of other immigration processes by several months. This coincided with the sudden lifting of Covid restrictions along with a reduced workforce in the immigration authorities as a result of Covid redundancies. This in turn has meant that the consequences of these two very different events, have resonated globally from an immigration perspective, with mobility teams having to adjust to delays by looking at virtual assignments when possible.



## The 'B' word

In addition to this, in the UK the fallout from Brexit is still being felt when it comes to immigration policies, with new immigration processes required for greater numbers of assignees both moving into the UK and for British nationals moving to the EU. We hear from our clients that these adjustments have by and large been made by this point – sometimes, the effect of a political decision is so finite, there's simply no option but to run with it.

Finally, in Asia, we have also seen a convergence of political disruption and Covid.



***Since the outbreak of the pandemic, and the latest socio-economic upheavals and geopolitical struggles across the world, the importance of having options across multiple jurisdictions in terms of where you can relocate and live is gaining traction.***

This has been evident in China, specifically in Hong Kong, and here there has been a notable trend of emigration as zero Covid policies took their toll. We have observed clients relocating assignees out of China, as expatriates became unwilling to relocate or return to the strict Covid restrictions. In both cases - while strict Covid restrictions have recently been lifted, including Hong Kong's mask mandate which was removed on March 1 - the main destination of choice has been Singapore.

In fact, several of our clients have relocated their Asia headquarters to Singapore, or shifted assignees back out of China due to the strict Covid regulations. Singapore Immigration meanwhile has had to tread a fine line between wishing to capitalise on this movement, while being seen to protect its own workforce.

When looking at the global landscape in 2023, it's hard to see this level of political and social change decreasing. Mobility teams and immigration authorities alike will continue to play catch up to the constant maelstrom of events outside our corporate walls.



# Working from home, away



by Leane Harding, Head of Global Mobility at Deloitte



**The issue of hybrid, or flexible, working between home and office is something most businesses in the world have had to grapple with since 2020, and that is unlikely to change any time soon.**

Since the beginning of the pandemic, businesses have sought to develop policies that will work for everyone. Yet how hybrid or flexible working is dealt with for those on assignment brings with it additional layers of complexity, bringing into question the very purpose of being on assignment at all. If an assignee never leaves the four walls of their house, do they actually need to be on assignment? Or are the benefits of being in the same time zone as colleagues and suppliers, along with immersion into a new culture, enough for assignees wanting to work from home while on assignment?

Deloitte's Leane Harding recently shared her thoughts with us on how you may want to consider managing this issue among assignees, and sheds light on why this is a work in progress.

## Have clear policies in place

As with any procedural HR issue, agreeing on a hybrid working policy for assignees between stakeholders is vital. It's important to be clear about what the organisation expects from its employees and those starting an assignment

from the outset. The needs and expectations of the potential assignee must be taken into consideration, but so do the commercial pressures on the business. Assignments can be costly, and relocation is a huge undertaking, so there must be a clear need to physically assign people to a new location.

One could question if the value of the assignment, for both the business and the individual, is diluted if an assignee is in situ in a new location but has limited in-person interaction with their colleagues if they work mostly from home. So be clear about this in your policy making. This has to work for your business and the assignee, to ensure overall success of the assignment.





## Consider front-loading face-to-face contact

Some assignees may require and request a hybrid working pattern. If that is the case, having more face-to-face interaction built into the first few months of the assignment should be considered. If face-to-face contact between colleagues is limited, I wouldn't be surprised if it could increase the likelihood of the assignment ending earlier than expected and not delivering value to the business or the individual.

There are elements of integration that will be challenging to replicate digitally or virtually. Not being able to shadow people in-person, or learn from colleagues just through osmosis, could have a detrimental impact on the long-term success of the assignment, so careful consideration is needed on how this can be done in a hybrid way.



***There are some things that, no matter how hard we try, are difficult to replicate digitally. Not being able to shadow people in-person, or learn from colleagues just through osmosis, could have a detrimental impact on the long-term success of the assignment.***

## The home as office

For assignees who are hybrid working, the home has of course become their office too. For those assignees in accommodation provided as part of their package, there are some grey areas in terms of facilities management. For example, for those in serviced accommodation, what happens if there are WiFi issues which need to be resolved? Who is responsible for ensuring work can continue seamlessly and should an assignee in this case have to work from the nearest office? Who is responsible for ensuring desk spaces and chairs are fit for purpose, or that there is adequate space available for home working? Size of accommodation will have different pressures in different locations. As an example, assignees in Hong Kong may face greater limitations with working from home, which will be different to locations where real estate is cheaper and bigger.

The above is by no means an exhaustive list of considerations for enabling hybrid work among employees on assignment. But as hybrid working continues and the world settles into this new approach to work, businesses with assignees will continue to come up against new challenges they hadn't considered before. The key is to remember that this is all a work in progress; there is no precedent here. Listening to the needs and requests of assignees, while being mindful of the challenges they are likely to experience, is key. And the longer this goes on, the easier (in theory!) evidencing reasoning behind any policy change should be.

# Addressing the sustainability agenda



by Ann Beavis, Head of Sustainable Development at Crown UK



We know from our clients that addressing sustainability is creeping up the priority agenda. Our Client Advisory Board at the end of 2021 rated sustainability as their top area of concern and the one they'd most like to concentrate on in 2022. And this has grown even stronger since.

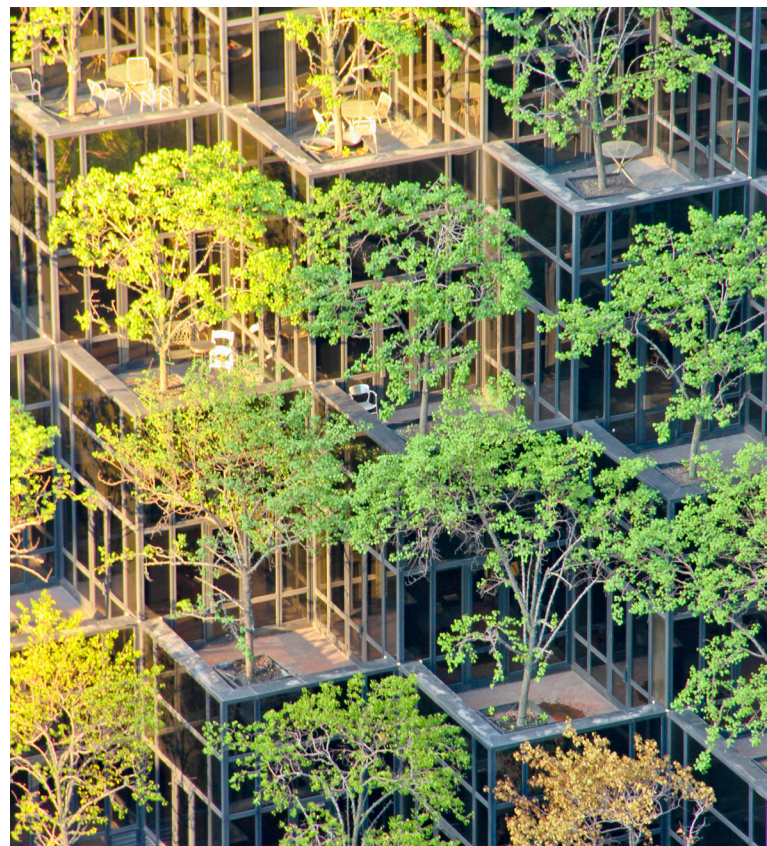
As companies begin to set net zero goals and review their own environmental impact, the issue of how to address sustainability in the mobility space is gaining ground. However, many mobility teams struggle with this. From assessing the impact of the programme to defining appropriate targets to make reductions, where to start can be difficult to ascertain.

Looking to the supply chain - your mobility providers, like Crown – is a great place to start. How can they help you to achieve your goals, and what can you expect from them in terms of support?

As a kick off, you may wish to review how sustainability aims are governed and audited, whether you are considering your own goals or those of your supplier. This will give you a framework of targets and issues to address. In addition to external governance, having a centrally organised committee dedicated to achieving your sustainability goals will ensure

progress and engender accountability. At Crown, we have launched a global Steering Committee with the following aims:

- Investigate reporting platforms to measure and report on carbon emissions
- Develop a strengthened, cohesive sustainability agenda across the Group
- Research and appraise emerging technologies for future development
- Build stronger sustainable service propositions
- Develop a robust reporting narrative for setting, measuring and developing targets.



Increasingly, we are seeing that clients are including sustainability as part of their partner selection criteria, and Crown will be doing the same with its own supply chain. When considering your supply chain, it's important to pay attention to their specific needs and truly partner with them. They may be much smaller and less financially robust organisations than your own with fewer resources – and their level of maturity may be different. It is vital that your supplier recognises the impact of their working practices for your own business.

For example, Crown recognised that to drive a wider programme of carbon reduction and more sustainable business practices we needed to educate our staff. We therefore rolled out the Carbon Literacy Programme to senior leaders and key functions and have audited our sustainability training to assess what additional training is needed and what elements should be compulsory for each role. As you approach your suppliers, consider the above. Could they benefit from joint educational activities? What level of understanding do they have of the issues at hand? More practically, other questions to establish their level of maturity in the sustainability space are:

- Can your providers collate their own sustainability data to enable you to build a baseline picture of your Scope 3 impact?
- Are they using renewable energy and to what degree?
- Can you work with them to agree targets that will support your journey? Answering these questions will give you a solid picture of your Scope 3 exposure, while providing your supplier with clear direction and expectation setting.

Our mobility team recognise that how we design, deliver and innovate our service must support our and our client's sustainability objectives. We have also taken the learnings from our corporate work and made sustainability the focal point of discussions with

our clients to co-create discussions that identify key areas of focus and attention as well as barriers to progress.



***Linking together the activities of all parties involved in your sustainability journey – your mobility programme, your wider corporate aims, your suppliers, your own clients if you have them – is essential to making meaningful progress for each party, and of course for the planet.***

### **Understanding and measuring your emissions**

**Scope 1:** This covers the Green House gas (GHG) emissions made by an organization directly.

**Scope 2:** These are the emissions an organization makes indirectly, such as through the energy that it uses.

**Scope 3:** This covers all of the emissions associated with the organization, up and down its value chain, for which it is indirectly responsible. This includes the emissions created from products an organization buys from its suppliers, and the emissions from an organization's products or services when customers or clients use them.

Many thanks to our contributors for their time.

If you have any views on some of the biggest trends and challenges this year, please share with us.

**Crown World Mobility** provides strategic assignment management, immigration and relocation services for multinationals and international organizations.

We work with all stakeholders to find the right solution, making it simpler to move individuals, accompanying partners, teams and entire businesses anywhere in the world, so they can get on with what they do best – take opportunities and grow.

*How the world works better* | [crownworldmobility.com](https://crownworldmobility.com)

For more insight on the trends challenges and opportunities facing the global mobility industry, follow us on:



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