

**SELF-INITIATED
SHORT TERM
TRANSFERS:
VOLUME & COST**



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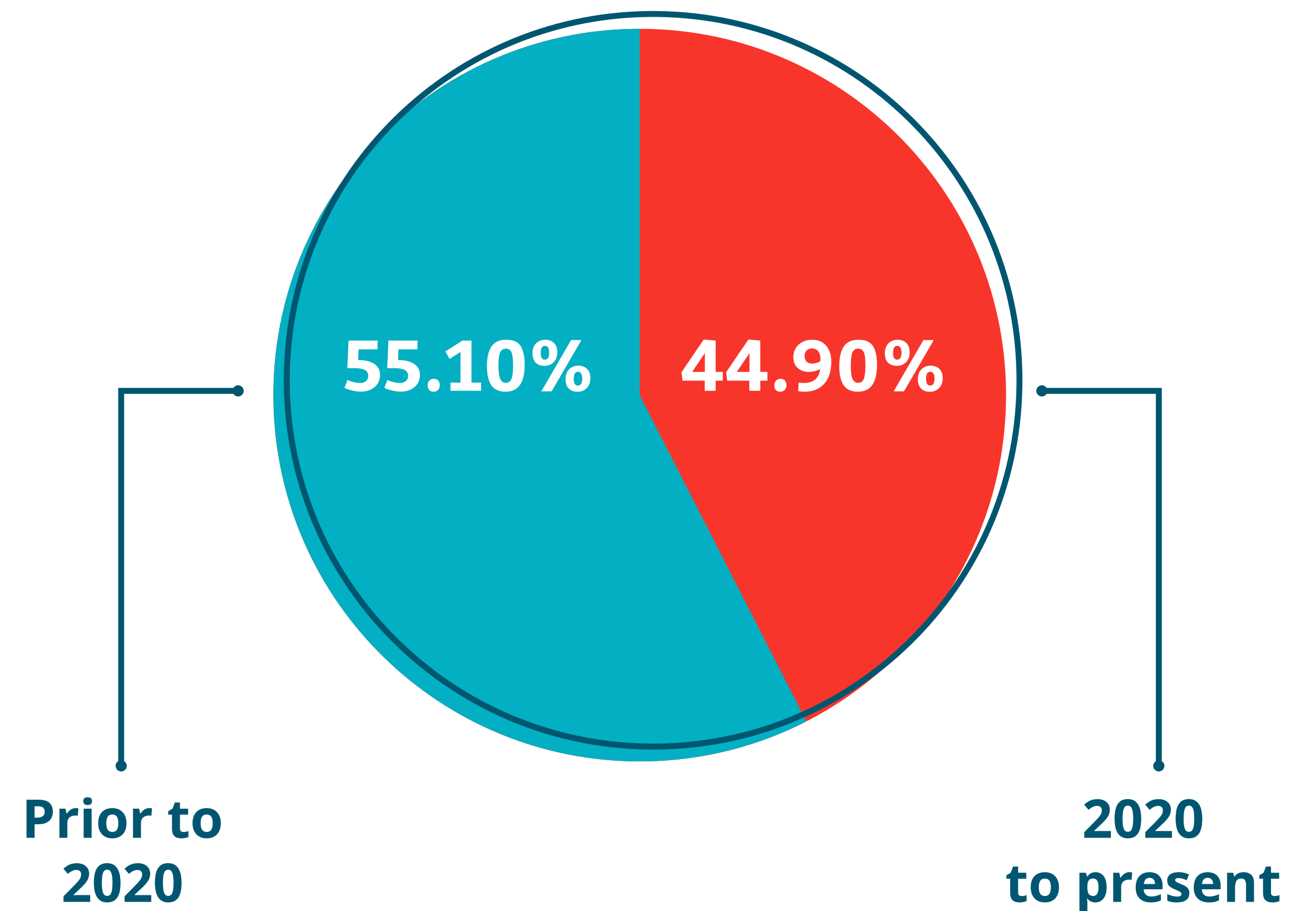
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Executive Summary

As Remote Work has continued to reshape the workforce and become a core competency of Global Mobility, a major new type of mobility program has emerged: the Self-Initiated Short Term Transfer. Recent Research by Worldwide ERC¹ has shown that a large majority (81%) of organizations have created these programs or are considering creating them. In order to further explore these new programs, and how they fit into a broader mobility context, Worldwide ERC has conducted a survey of 459 Chief Human Resources Officers and other senior leaders whose organizations currently have these programs. As this report will show, Self-Initiated Short Term Transfers are a major new source of mobility volumes and costs. These programs touch many areas of the organization and come with numerous standard mobility benefits to support the employee in their transfer.

Definition of Self-Initiated Short Term Transfers: Employee initiated or requested transfers to a new location to work for a short period.

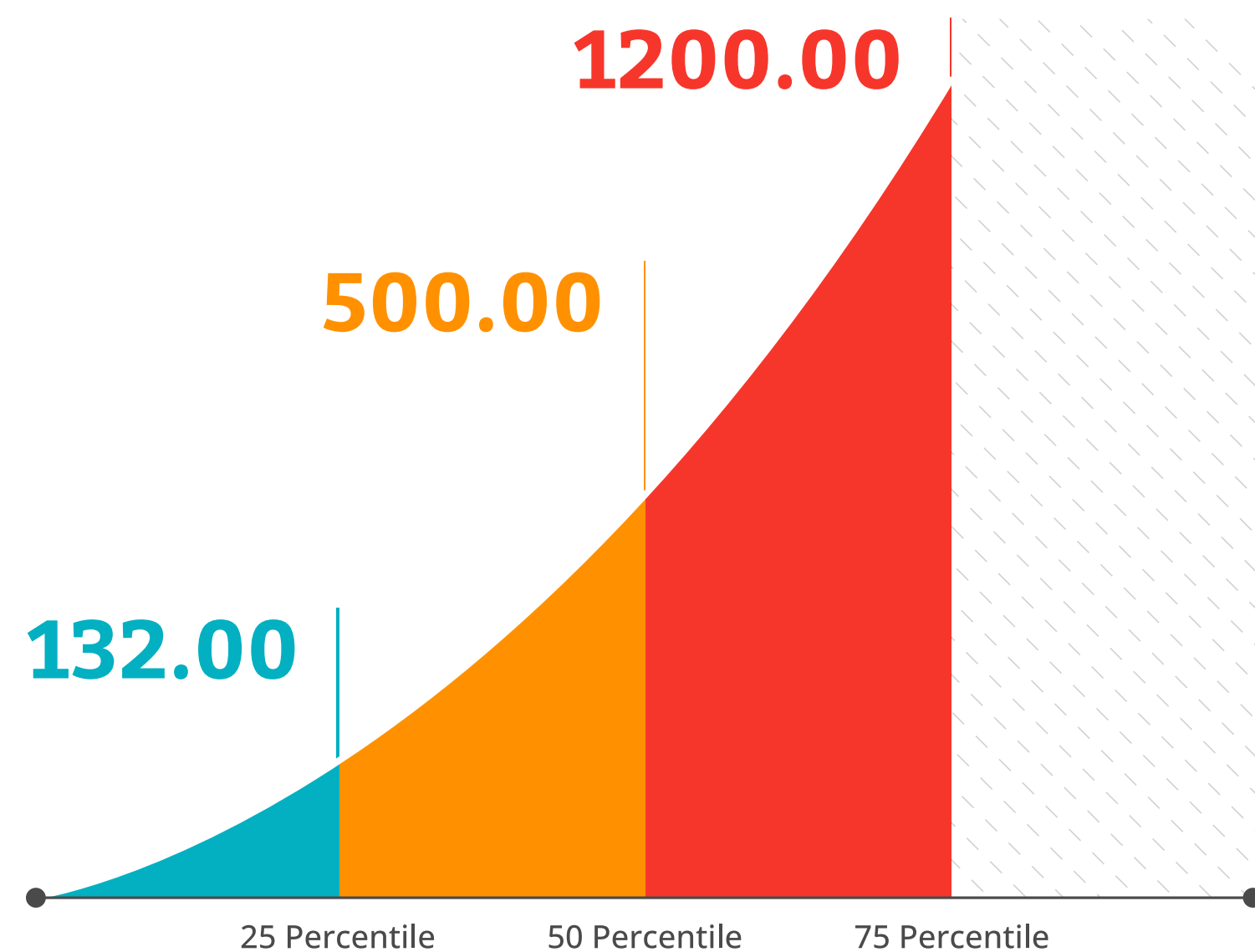
When organizations created these programs



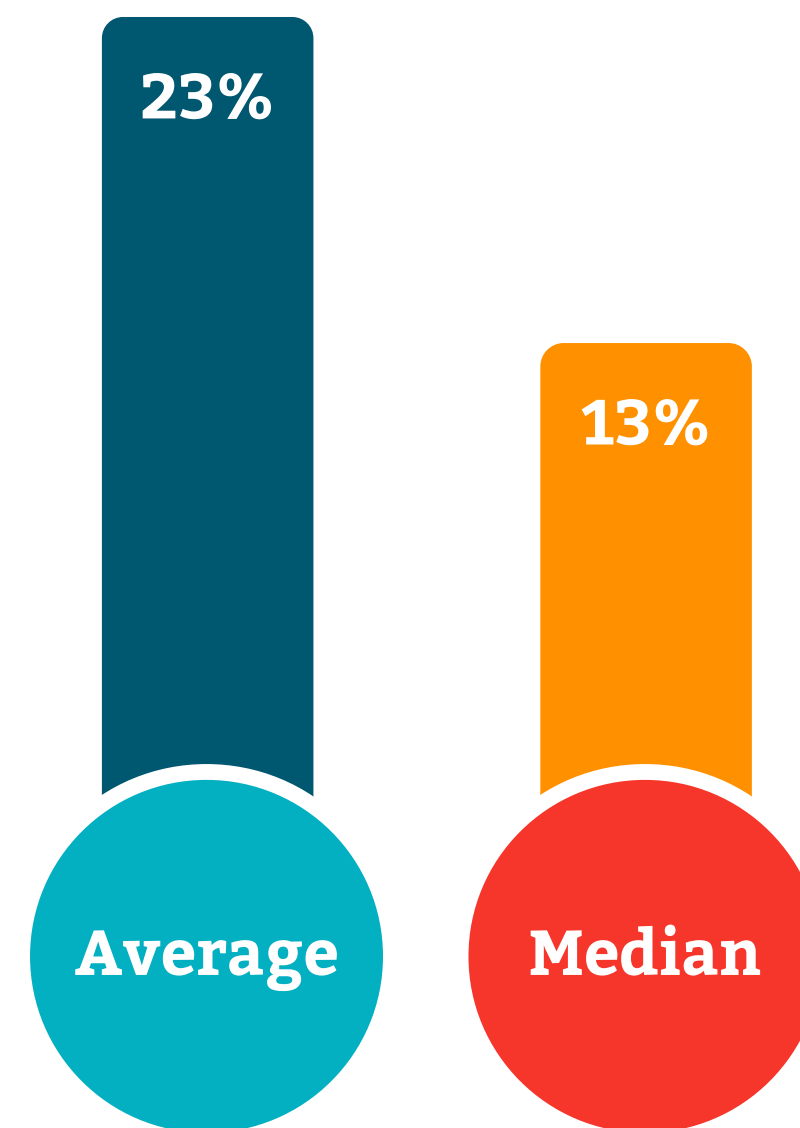
Volumes & Cost

The number of employees expected to be both eligible and to take part in Self-Initiated Short Term Transfers is high compared to traditional mobility programs. For example, the median respondent estimated that 40.50% of their workforce will be eligible, while 13% will be expected to use these programs over the next 12 months. That translate into substantial transfer volume, with the median respondent indicating that 500 employees will transfer.

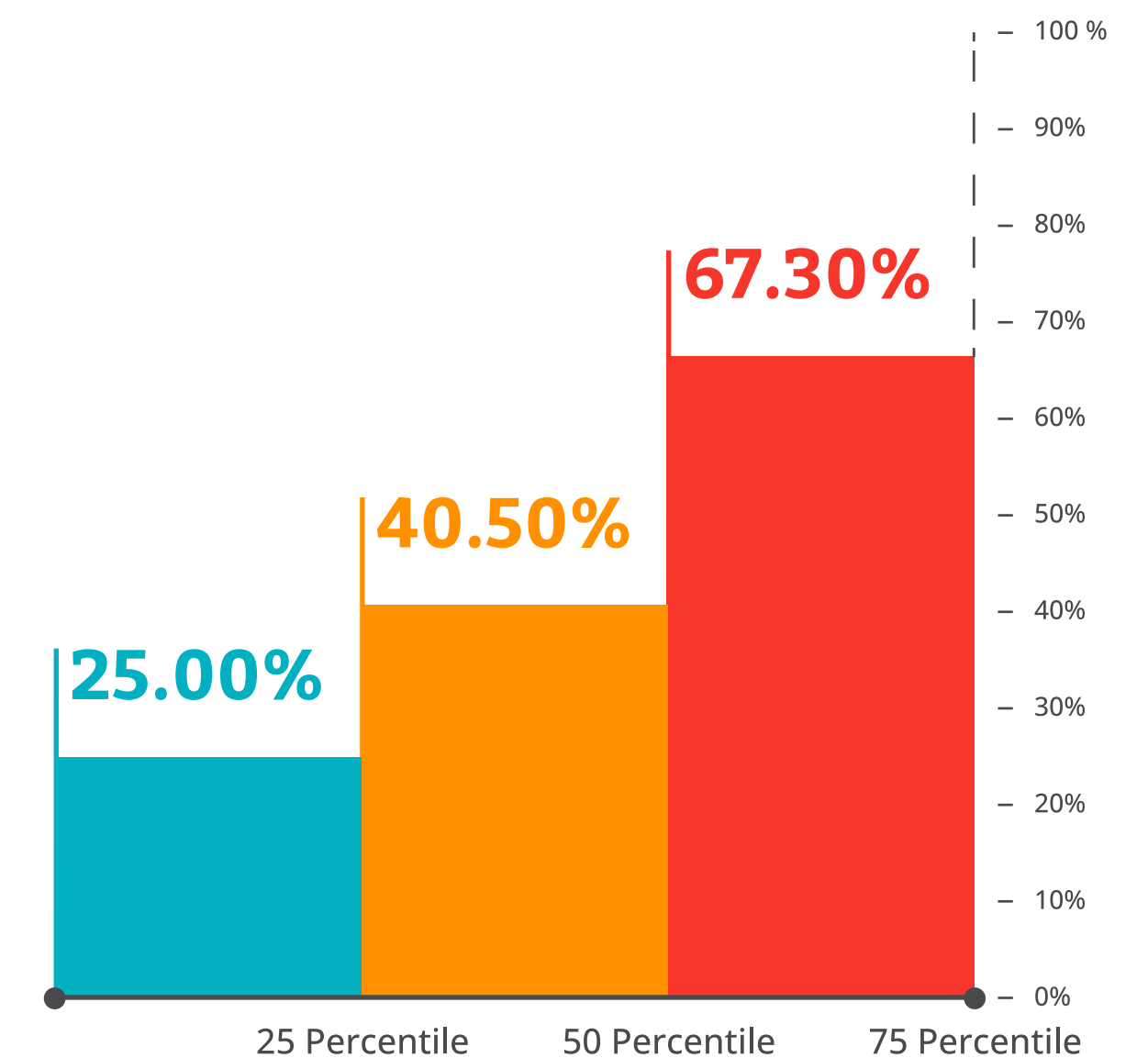
Number of employees expected to use these programs over the next 12 months per organization



Percentage of employees expected to use these programs over the next 12 months per organization



Share of total workforce that will be eligible for these programs



While volumes are high compared to traditional mobility programs, costs are much lower, with the median respondent indicating that a Self-Initiated Short Term Transfer will include \$4,625 in benefits. Overall, this is a substantial cost for the employer, with the typical respondent spending \$2,312,500 on these programs.

Typical amount provided or reimbursed in US Dollars

Tax information/advice/support	\$400
Work authorization information/advice/support	\$500
Language tools or training	\$500
Cultural tools or training	\$500
Living & lifestyle information	\$475
Travel expenses (airfare, transit, etc)	\$1,000
Baggage/luggage fees	\$300
Accommodation finding/assistance	\$700
Area orientation	\$250
TOTAL	\$4,625



Benefits

Organizations continue to see the value in providing support benefits to employees using Self-Initiated Short Term Transfers, with a range of benefits being commonly provided, from tax advice to area orientations.

Benefits provided to employees using these program

Tax information/advice/support	46%
Work authorization information/advice/support	61%
Language tools or training	53%
Cultural tools or training	44%
Living & lifestyle information	39%
Travel expenses (airfare, transit, etc)	62%
Baggage/luggage fees	26%
Accomodation finding/assistance	50%
Area orientation	27%



Design

There are real differences in the reasons organizations have been introducing self-initiated short term transfer programs, with roughly equal proportions of respondents using these mainly for talent development or for employee experience. Of course, each of these is not mutually exclusive, and so many organizations will promote these programs both for employee experience, as well as part of their talent development strategies.

Main reason organizations have created these programs



52.10%

To improve talent development and management by developing employee skills, promoting a global company culture and increasing business unit exposure



47.90%

To improve the employee experience and/or to allow employees to have a more flexible work/life balance

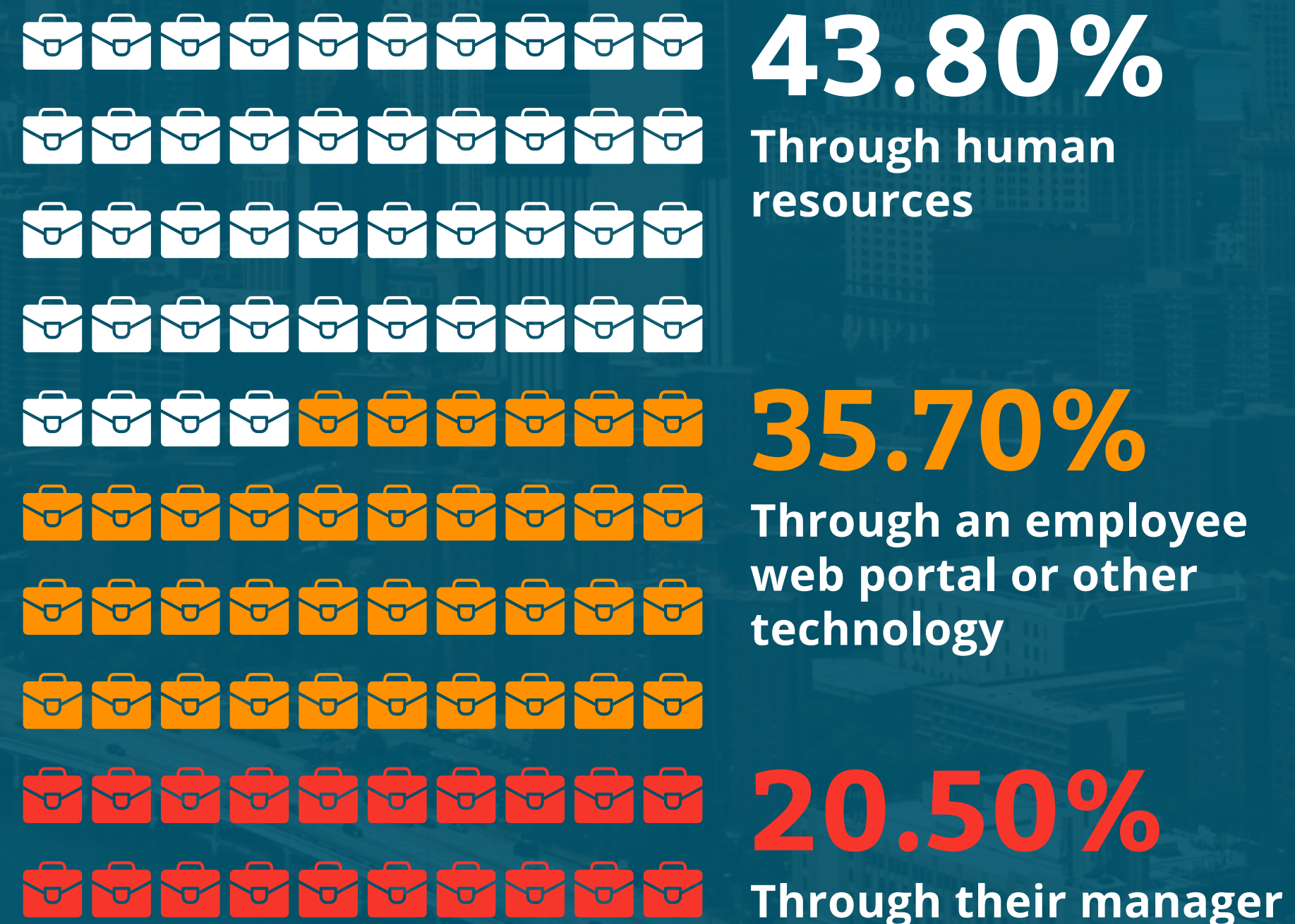


Design

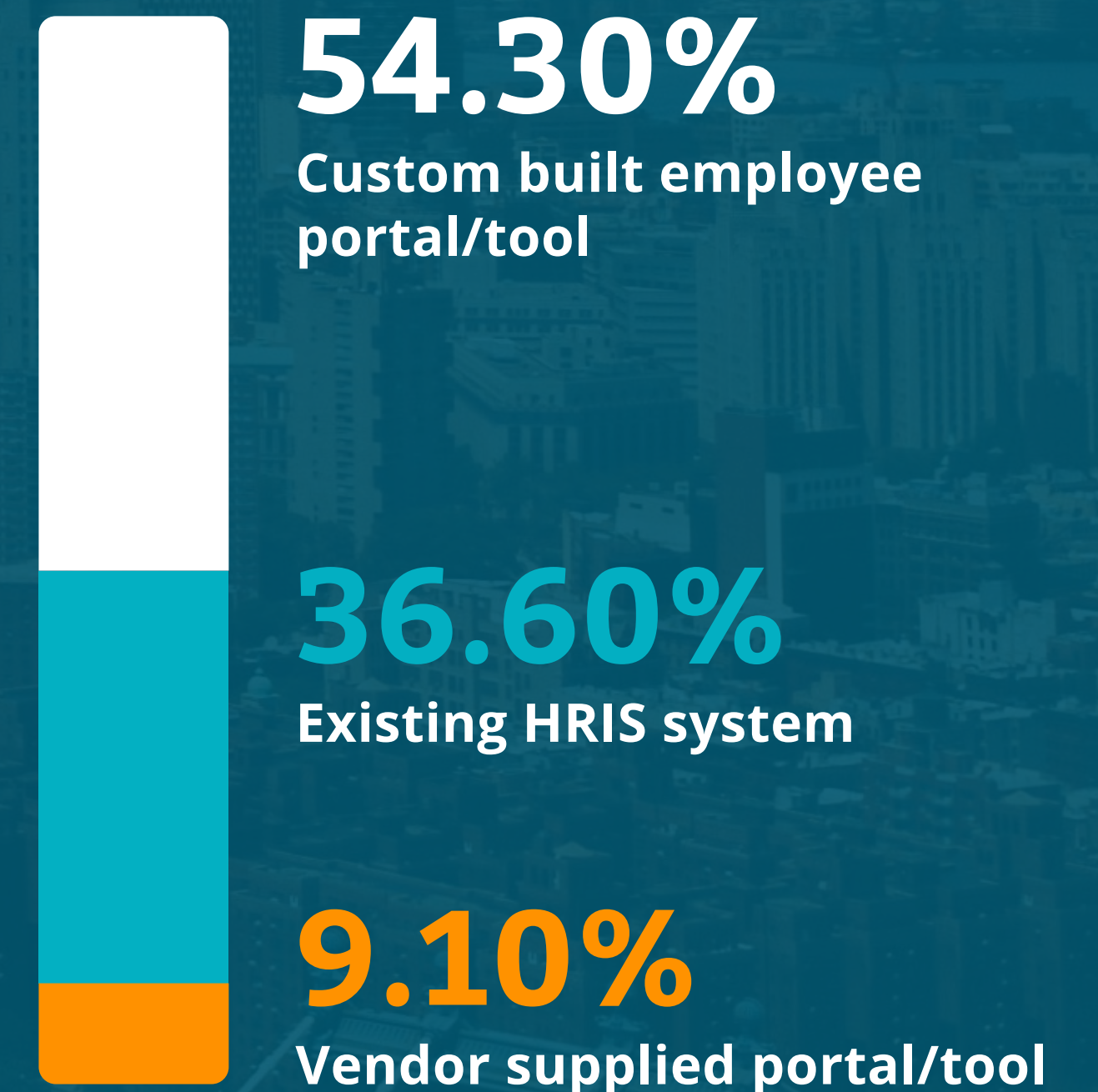
Continued

To initiate requests for these transfers, respondents have a mixture of approaches, from directing requests through human resources or their manager, to requiring employees to use a web portal. When organizations do use a web portal or other technology, this is most commonly done through a custom built employee facing portal/tool.

How employees request their trip/move



Type of technology used to request a trip/move





Design

Continued

Self-Initiated Short Term Transfer approvals must go through several layers of approval, with the human resources department in both the origin and destination location being most commonly cited. Approvals can also be required of the origin and destination business unit, as well as more specialized departments such as mobility, tax, compliance and immigration.

	Who must give approval for an employee's trip/move	Order that approvals for an employee's trip/move must occur
Origin/home business unit	29.85%	1
Destination business unit	34.20%	2
Origin/home human resources department	66.01%	3
Destination human resource department	59.91%	4
Global mobility department	22.00%	5
Tax department	13.07%	6
Compliance department	15.69%	7
Immigration department	16.56%	8



Design

Continued

Slightly over two thirds (69.30%) of respondents indicated that the company is responsible for ensuring the employee has appropriate work authorization for their destination location, although a still significant minority (30.70%) places the burden on the employee to handle authorization and work visas when relevant.

Who is ultimately responsible for ensuring the employee has appropriate work authorization, such as a work visa, in the destination location



69.30%
The company



30.70%
The employee

Requirement that the employee be based where the organization has an office or permanent establishment



52.70%
Yes



29.00%
Case by case

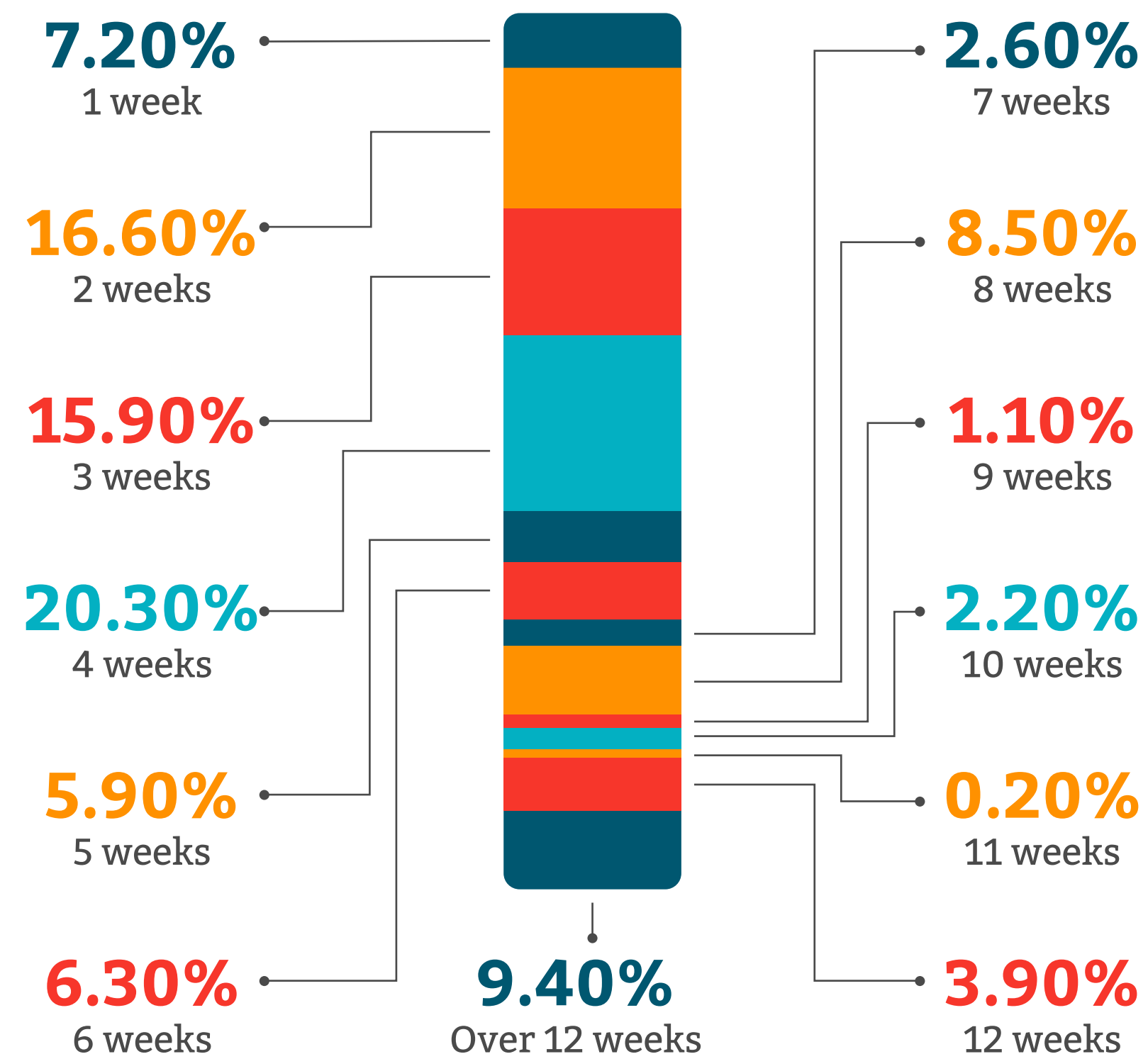


18.30%
No

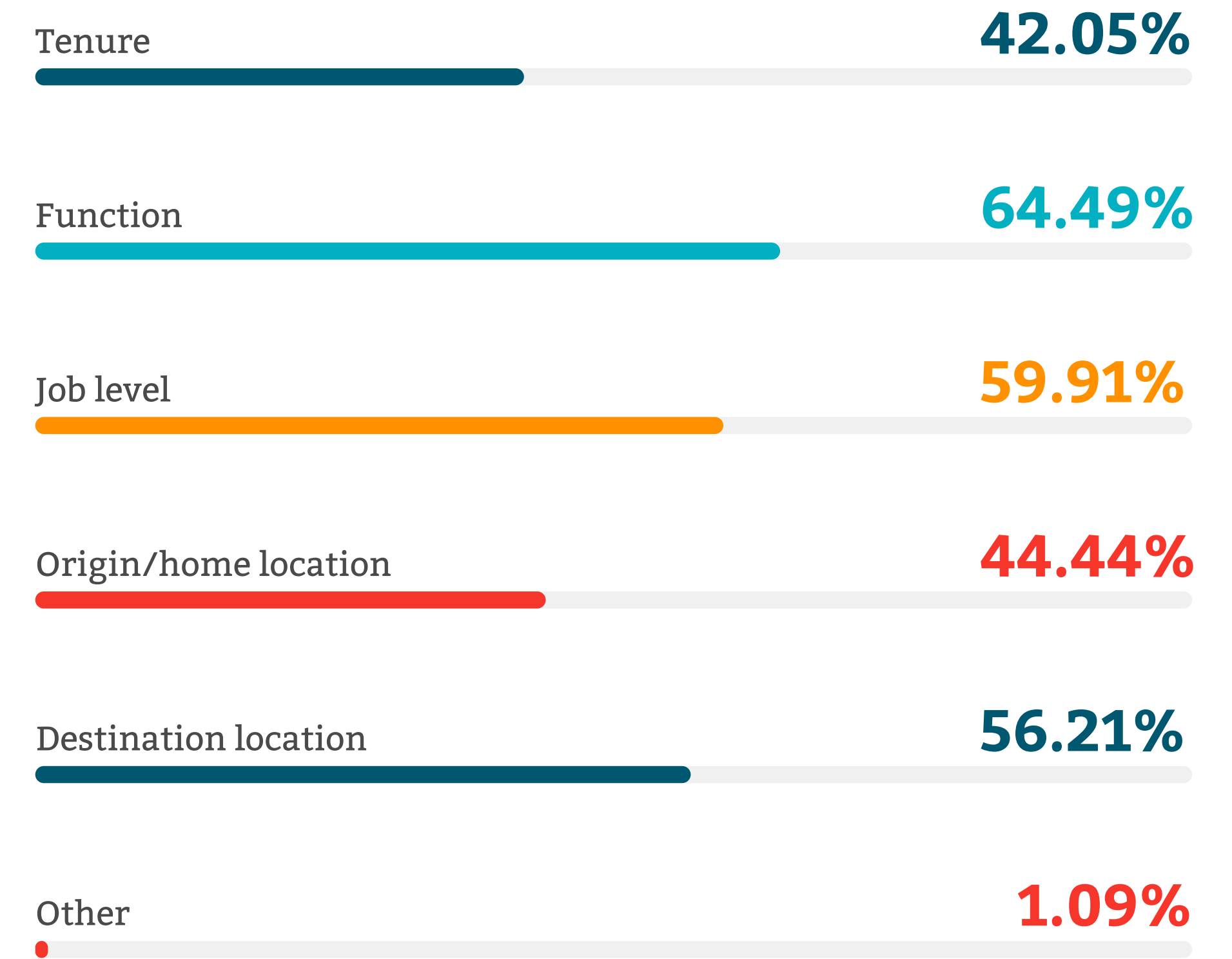
Length

The typical length allowed for Self-Initiated Short Term Transfers varies widely, from 1 week to over 12. Respondents most commonly said that a transfer should be 4 weeks or less (60%). This makes sense as a transfer of a month or less will likely keep compliance risks, and costs to the organization, to a minimum.

Most commonly allowed length of time for the trip/move



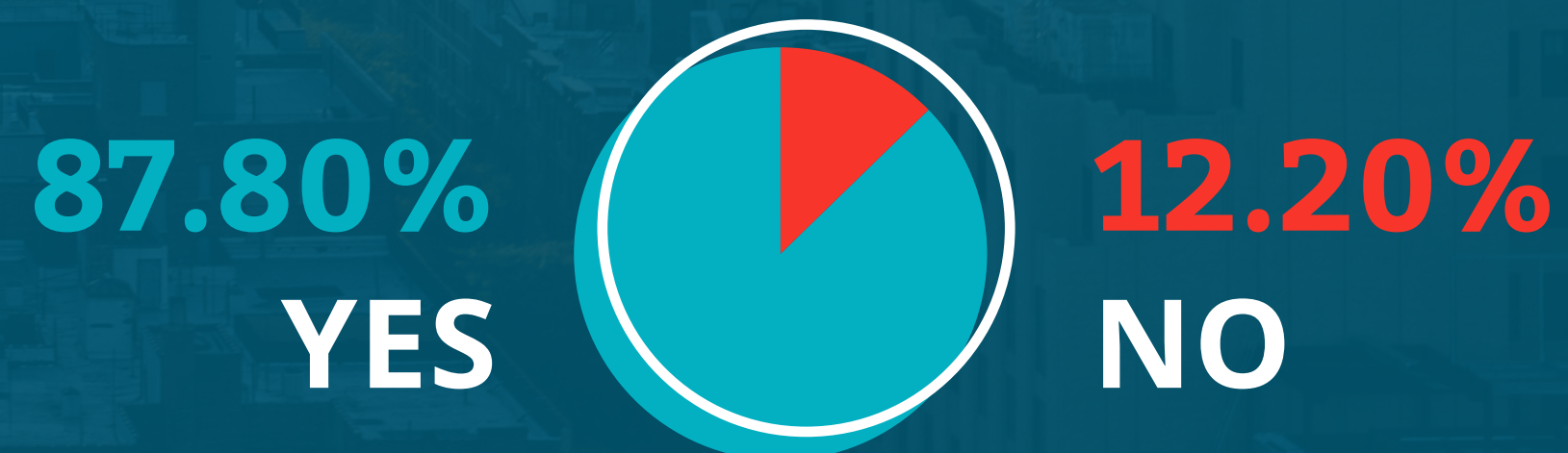
Key factors that determine how long the trip/move can last



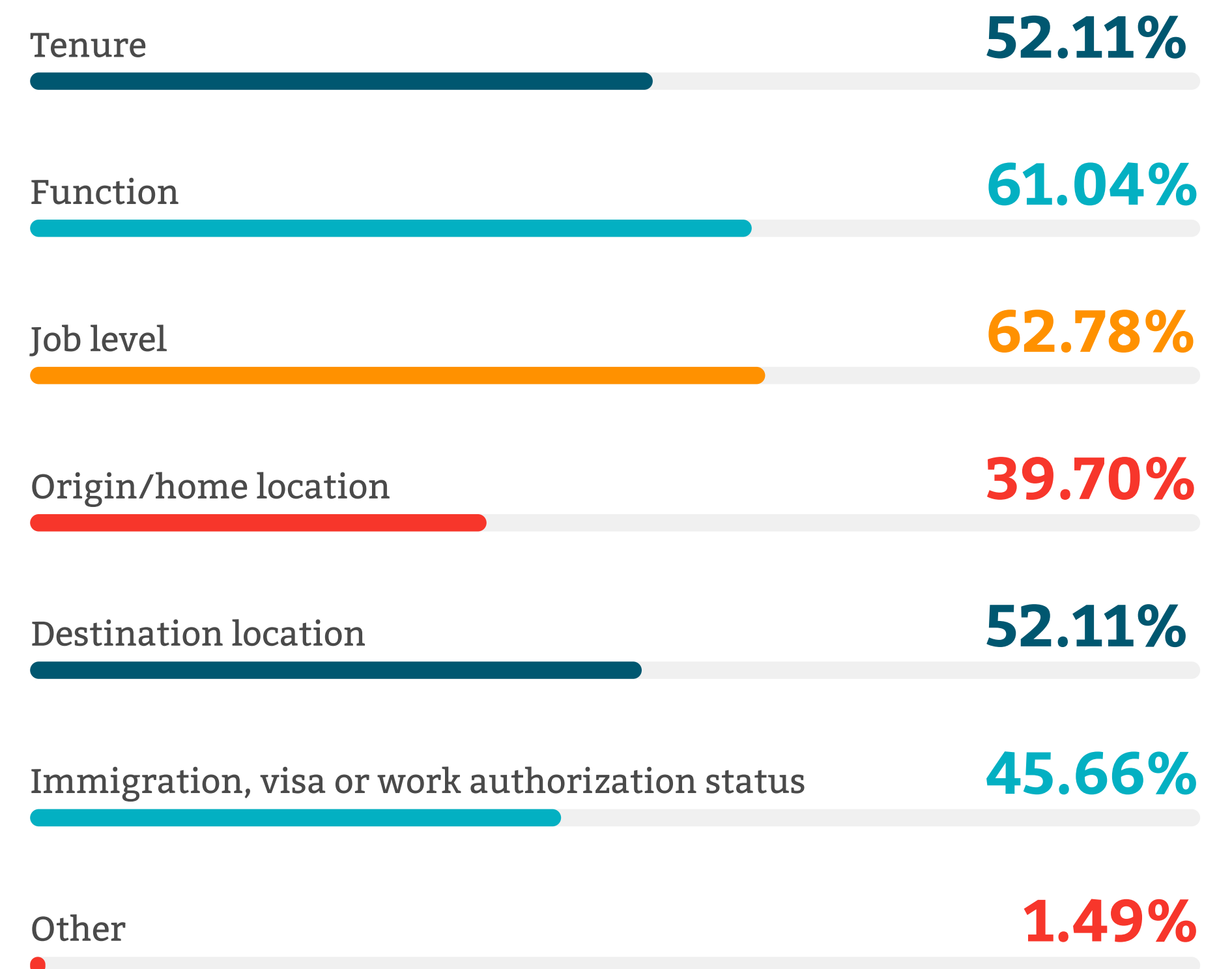
Eligibility

The vast majority of programs (87.80%) have eligibility requirements for their Self-Initiated Short Term Transfer programs. These range widely and typically can include: tenure, function, job level, origin/destination locations and immigration/visa/work authorization status.

Share of programs with employee eligibility requirement



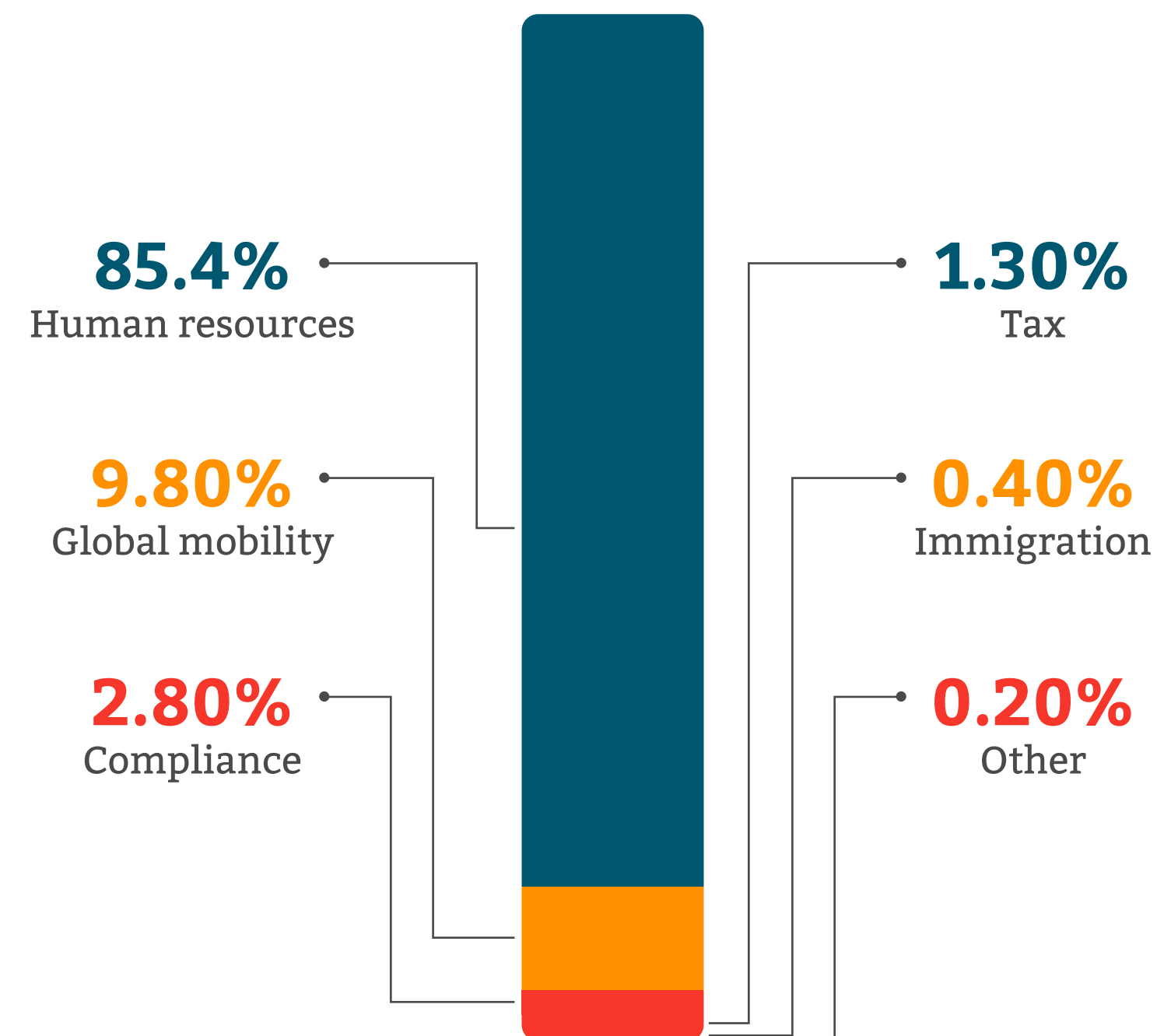
Key factors used to determine employee eligibility



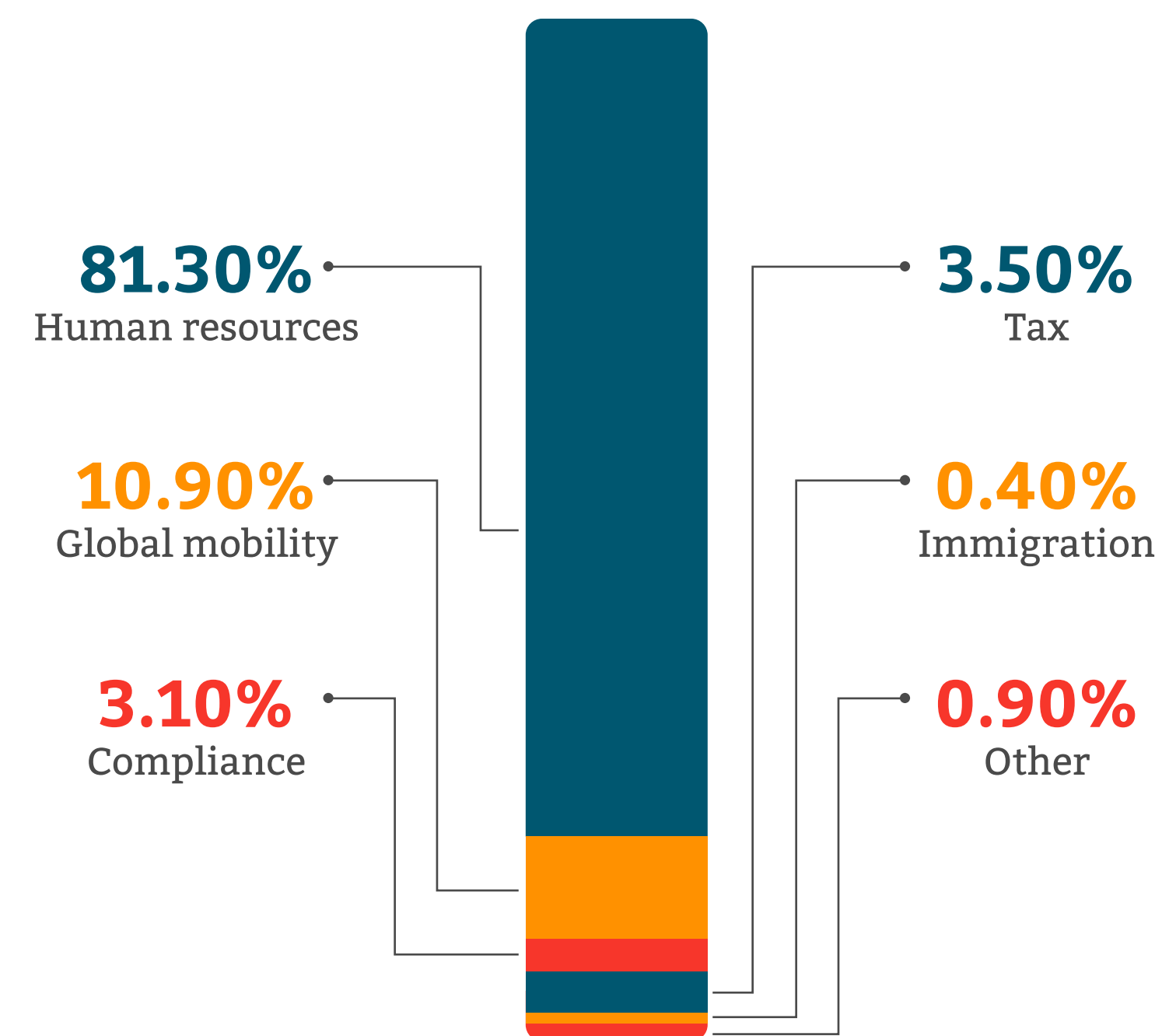
Support Structure

Almost all Self-Initiated Short Term Transfer programs sit within a broader human resources department (85.40%), with the next most common location being the global mobility department (9.80%).

Department who is ultimately responsible for the creation and strategy of these programs

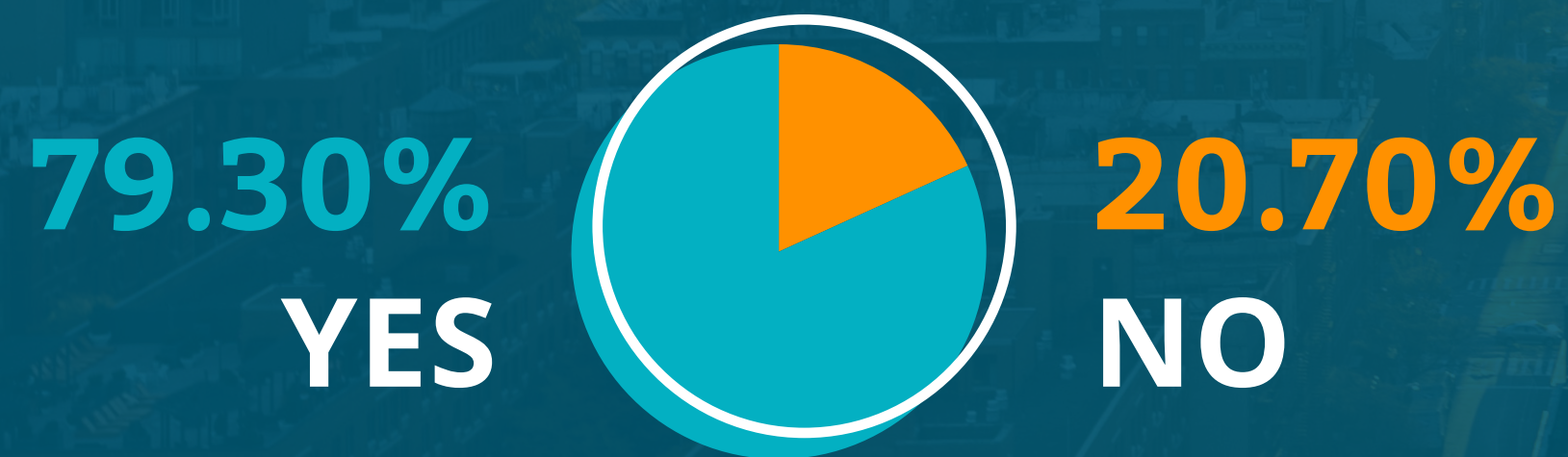


Department who is ultimately responsible for the management and administration of these programs

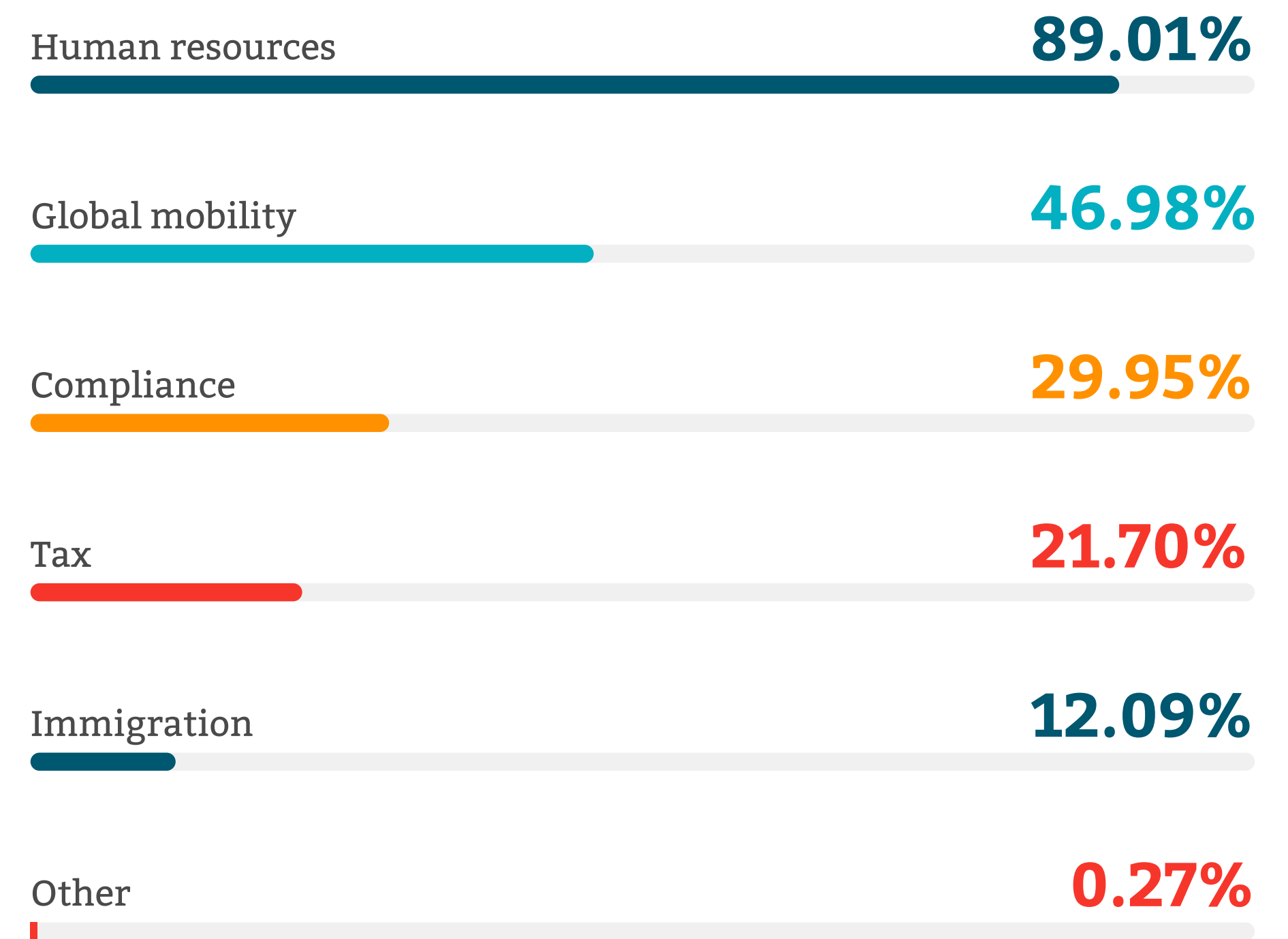


The larger organizational cost and volume of Self-Initiated Short Term transfer programs has seen a strong majority of respondents (79.30%) increase staffing for management and administration. Increased staffing falls in a variety of relevant areas, with the most common being general human resources, global mobility and compliance

Organizations that have increased staffing to manage and administer these programs



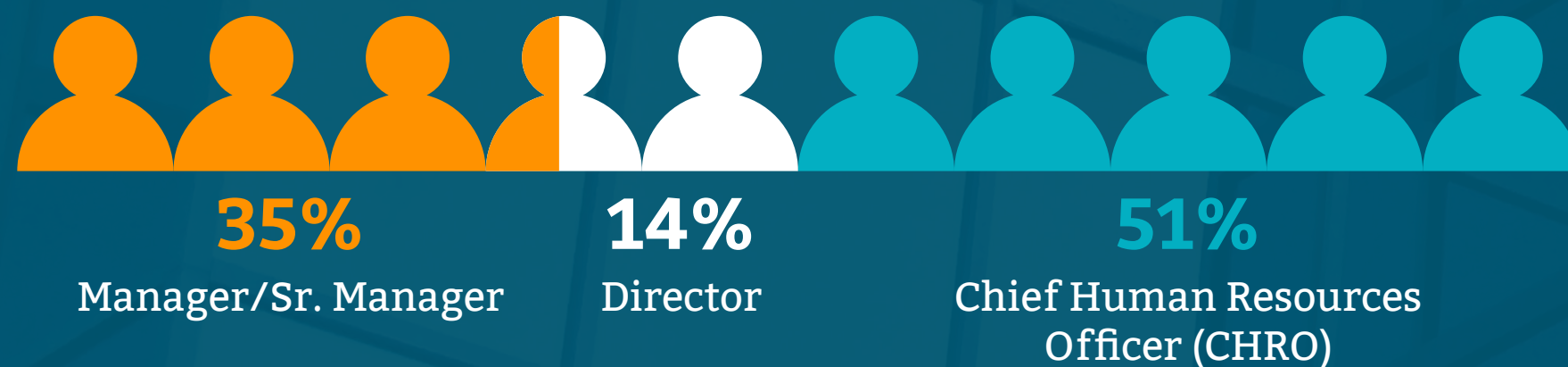
Departments that have seen increased staffing to support these programs



Data & Methodology

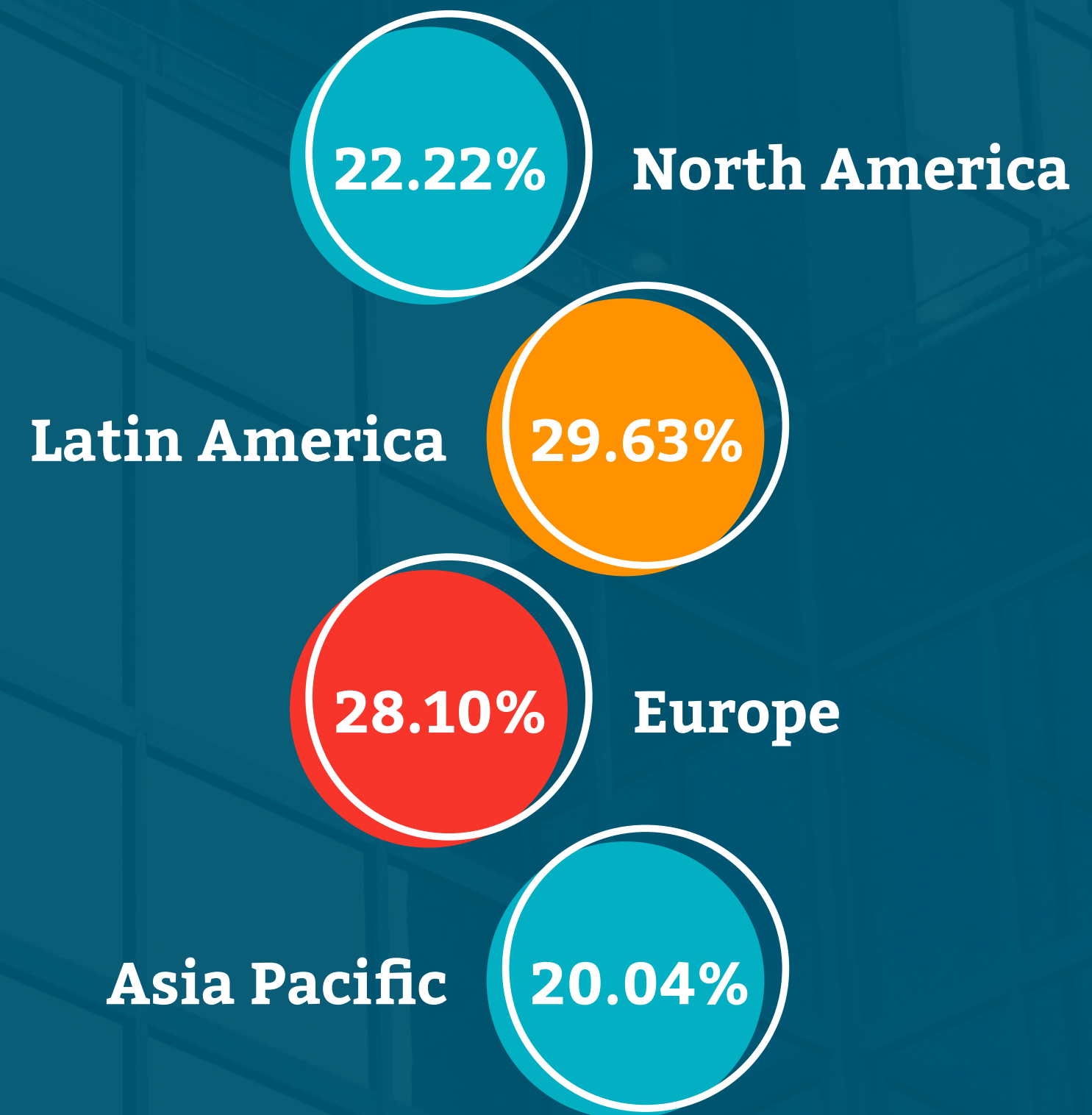
Worldwide ERC® launched a survey to better understand and gain insight into how senior HR leaders and corporate mobility leaders have handled remote and hybrid work practices and policies. The following data comes from a global panel of 459 senior human resources leaders (CHROs, directors, and managers). We strove to represent the diverse, global group of professionals who have a direct role in the implementation and oversight of their organizations' Self-Initiated Short Term Transfer program.

Respondent job level



Respondents were distributed roughly evenly over all regions—North America, Latin America, Europe, and Asia Pacific.

Respondent organization headquarters region



Along with their geographic diversity, many serve medium- to large-sized enterprises, from both a revenue and workforce standpoint. The majority of senior human resources leaders work for companies that have annual revenue of \$10 million to \$500 million USD and a workforce of 1,000-5,000 employees.



Respondent organization annual revenue

Up to \$10 million USD	14.60%
\$10 million to \$500 million USD	48.80%
\$501 million to \$1 billion USD	24.84%
Over \$1 billion USD	11.76%

Respondent organization workforce size

501 to 1,000	27.89%
1,001 to 5,000	44.23%
5,001 to 10,000	14.81%
10,001 to 50,000	6.54%
Over 50,001	6.45%

Not only do respondents hail from diverse regions across the globe and serve successful organizations, they represent a variety of industries. The top three industries represented by senior human resources leaders were: professional services, technology, and financial services.



Respondent organization industry

Consumer Goods	4%
Energy	2%
Engineering & Construction	7%
Financial Services	9%
Governmental	6%
Insurance	1%
Life Sciences	3%
Manufacturing	8%
Mining & Metals	0%
Non-Governmental Organization (NGO)	1%
Non-Profit Organization	2%
Other	7%
Professional Services	20%
Retail	8%
Services	7%
Technology	12%
Transportation	2%

Citations

¹The Evolution of Remote Work

