

Paper



Master Course Human Resources and Global Mobility Expatisse Academy and FEI, Erasmus University, Rotterdam, the Netherlands

Author
Reimara Valk

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tightrope walker performing a balancing act
towards knowledge broker and linchpin

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the business and international assignee

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1.0 INTRODUCTION

Globalisation has resulted in companies doing more and more business across national borders and there is increased competition for new customers and markets. Consequently, an internationally mobile workforce is essential for achieving strategic objectives (Santa Fe, 2018). Efficient global expansion and growth is critical for today's enterprises and hinges on how effectively organisations can move key individuals to international locations to help manage and run organisations' geographically dispersed operations and who can work effectively across multiple geographical boundaries to support overall business goals and objectives (K2 Corporate Mobility, 2016; Schwartz et al., 2010; Stahl et al., 2012).

The rapid growth in the types of cross-border activities means a larger number of organisations are likely to become increasingly active in terms of the number of in-bound assignees and intraregional assignments, with increased business travellers, commuters and project-based staff, increased number of short-term assignments, 'local plus' and localisation (Ferraro, Towell, Rieger, & Lim, 2013; K2 Corporate Mobility, 2016; Santa Fe, 2018). While organisations of all sizes are starting to recognise the value of Global Mobility in corporate growth planning, many fail to recognise the value their GM teams achieve for the business, or the challenges teams face on a daily basis (K2 Corporate Mobility, 2016). These challenges will continue to play out in the context of the growing complexities of managing an internationally mobile workforce across the whole spectrum of activities that include governance, defined as "the system of rules and processes set up by an organization to ensure its compliance with local and international laws, accounting rules, ethical norms, internal codes of conduct and other standards" (SHRM, 2018) and providing direction on compliance issues, stricter immigration, international corporate/individual tax liabilities, talent management, career planning, supply chain, logistics and service delivery (Ferraro, et al., 2013; Jones-May in Santa Fe, 2018). When these challenges are being dealt with adequately, the business benefits of effective global mobility include improving visibility to costs, develop talent fitting the needs of the business, improving Return on Investment (ROI), reducing the risk of non-compliance and supporting global growth (Schwartz et al., 2010).

To date, there is a dearth of academic research on the impact of the aforementioned challenges on the Global Mobility (GM) function, more specifically, the transformation of the global mobility function into a strategic function. This forms the rationale for the present research scrutinizing further the challenges global mobility functions face and its impact on the transformation journey. In so doing, this research investigates the roles and characteristics of the GM function and the GM specialists to increase our understanding of how these help and hinder the transformation of the GM function into a strategic function.

1.1 Objectives

The purpose of this paper is to *firstly* provide insight into the transformation of the Global Mobility (GM) function into a Strategic Global Mobility function (SGM) within global organisations, shedding light on the SGM intended-actual gap, i.e. the current versus the future role of the GM function; and *secondly*, exploring the liaison of the global mobility function with internal and external stakeholders to transform into a strategic function in order to create value for the business and the expatriating/expatriated employee.

1.2 Research question

What are the factors that inhibit and help the Global Mobility function in its transformation from a tactical/transactional function into a strategic function?

1.3 Research sub-questions

RQ1. In what way do the challenges in the internal and external environment influence the transformation of GM into a strategic function?

RQ2. What is the relation between the liaison and engagement of the Global Mobility function with internal and external stakeholders and the transformation into a strategic function?

RQ3. How do GM professionals and their stakeholders view the role, purpose and future of the global mobility function?

1.4 Thesis statement

The lack of liaison and engagement of the Global Mobility function with stakeholders and the lack of capabilities of the GM function and GM specialists inhibit the transformation from a tactical/transactional administrative GM function into a strategic GM function.

1.5 Contribution to theory and practice

This paper contributes to the literature in two ways:

First, by integrating Human Resource Development (HRD) and Global Mobility literature the paper identifies the characteristics of the roles of the Global Mobility function and the characteristics of Global Mobility specialists to empirically explore the influence on the transformation of the Global Mobility function into a strategic function. In so doing, this paper reveals that the lack of liaison and engagement with key stakeholders, lack of alignment between business strategy and global mobility strategy as well as lacking capabilities to be a strategic business partner and make a sound business case inhibit GM functions to transform into a strategic function.

Second, by presenting a 'Global Mobility Specialists Competencies' model, identifying the capabilities required to fulfil a business partner role required to transform GM into a strategic function.

1.6 Reader's guide

The paper is presented in four sections. First, the transformation of the Global Mobility Function is discussed. Second, the liaison and engagement with internal and external stakeholders is addressed, which is required for the Global Mobility function to transform into a strategic function, as this paper will show. Third, this paper identifies the triggers that drive the change in the role of the global mobility function and global mobility professionals and the challenges these changes pose to Global Mobility functions in their transformation journey towards a strategic function. In so doing, the paper looks at the roles, purpose and future of GM functions. Two theoretical models are presented, identifying the characteristics of the roles of the GM function and GM specialists and which serve as the framework for the empirical investigation. In a subsequent section, the methodology of the present study is outlined. Fourth, findings of the empirical study are presented followed by a discussion, addressing limitations and providing suggestions for further research and making recommendations for practice. Finally, a reiteration of the study follows in the conclusion.

2.0 THEORETICAL FRAMEWORK

2.1 Transforming the Global Mobility function

At present, the transformation of the Global Mobility (GM) function from a tactical/transactional function into a strategic position within the company is receiving increasing attention from various internal and external stakeholders.

Why? Because transformation into a more strategic position is required for Global Mobility to remain valuable and sustainable as a corporate function by having recognised significance to business strategy (K2 Corporate Mobility, 2016). With a strategic focus on value back to the business, the Global Mobility function can move from being reactive to an appreciated strategic business partner to the business and a contributor to international growth (K2 Corporate Mobility, 2016). The real benefit of global mobility transformation will be the improved ability to execute the organisation's mobility strategies and, in turn, address business needs for growth, globalisation, and global talent management (Robb & Au, 2016). However, this transformation journey poses challenges, which relate to the role and characteristics of the GM function and GM specialists, addressed in a consecutive section of this paper. First, this paper looks at an enabler of transformation, that is stakeholder liaison and engagement, which the next section addresses.

2.2 Global Mobility and internal and external stakeholders: liaise and engage

A strategic global mobility team is a value-driven team that creates meaningful interactions, collaboration, relationships and mutually beneficial partnerships with key stakeholders as well as delivering measurable output that creates competitive advantage to help the organisation to achieve their overall objectives (K2 Corporate Mobility, 2016; Robb & Au, 2016).

Fundamentally, Global Mobility teams have representation within key meetings to become aware of business changes and its implications, to stay in touch with what is happening within their own organisations, to understand the intent of the company and its leaders, the longer-term objectives, the structure of the organisation, its culture and the key internal stakeholders (K2 Corporate Mobility, 2016). Hence, purposeful and frequent communication and discussions with senior executives and the board, line managers, finance, payroll, and accounting, human resources, overseas counterparts, assignees and suppliers is key to understanding the direction of the business and upcoming projects, assists decisions relating to resource allocation and helps to identify where Global Mobility can create value (K2 Corporate Mobility, 2016).

A study by Santa Fe (2018) that showed that more needs to be done to strengthen collaboration and communication between Global Mobility teams and the wider business to ensure increasing engagement and alignment in managing risk and compliance in regards immigration and tax issues, talent management and succession planning, and new implementation of laws and regulations, i.e. the rule or order issued by an administrative agency of government, which usually has the force of law (SHRM, 2018).

In sum, liaison and engagement with stakeholders is about:

- continued dialogue and clear communication
- building individual relationships, face-to-face
- understanding the individual's needs
- identify and demonstrate the added value of working with GM

This is exemplified in the following quote:

"Know your business and understand the commercial aspects; engage with internal stakeholders and ask for their guidance and support in e.g. data, risk, talent etc.; engage with HR and business leaders to understand their needs and then present solutions that mobility can provide to demonstrate value; find the data and report it; leverage all your vendors and have them collaborate with you to identify all data venues and how to aggregate and report them" (Welch in Santa Fe, 2018).

This quote touches upon the essence of transforming the Global function into a strategic function that essentially evolves around business acumen, stakeholder engagement, internal and external partnerships and data-driven solutions. It begets the question whether the global mobility function sufficiently engages, communicates and builds relationships with the business to understand their needs and objectives to be able to demonstrate its value to the global organisation in a strategic role. The next section will further touch upon the role of the Global Mobility function and specialists.

2.3 The purpose, future and role of global mobility

The role of global mobility is evolving from being a pure processing function to a partner that can deliver unique business support capabilities in response to a more complex and challenging environment (Robb & Odell, 2015). The Deloitte Pulse Survey (Robb & Au, 2017) identified a combination of both external and internal triggers that are driving the change in the role of the global mobility function and global mobility professionals:

- strategic business objectives involving global mobility
- increased compliance/scrutiny
- entry into new markets
- increased focus on talent development

2.3.1 Role changes, barriers and challenges

The historical role of the Global Mobility function is transactional, where the focus is on information provision, efficiency, quality, compliance excellence and cost effectiveness. However, growing investment in international expansion and changing business models means that global mobility is no longer expected to act as merely a support and administrative function. Instead, GM needs to take a business-driven approach where:

- a) the GM function is considered a strategic advisory function and a key enabler of the business and global workforce planning strategy;
- b) GM, talent and reward are fully aligned;
- c) performance metrics are tracked via advanced reporting in real time using data analytics;
- d) programme costs are proactively planned, monitored and used to guide global resourcing decisions (Robb & Odell, 2015).

There is an increasing expectation for global mobility professionals to act as advisors and partners to the business to help in global workforce planning and consulting on global mobility to achieve business and talent goals (Robb & Au, 2016). Although global mobility professionals are increasingly acting in an advisory role, less than a third of surveyed companies view mobility professionals as business partners (Robb & Au, 2016).

In order to become effective business partners, Global Mobility functions need to have an appropriate structure, branding, service delivery model, business aligned policies, streamlined, seamless and highly automated processes gained from mobility technology - which can yield efficiency and cost improvement-, and the skillset and knowhow. Underpinning all this should be an organisational culture that is supportive of global mobility as both a strategic enabler and business partner (Robb & Au, 2016; Robb & Odell, 2015).

The Deloitte Pulse Survey (Robb & Au, 2016) revealed that global mobility functions face barriers and challenges in functioning as business partners due to the following reasons:

- The increased scrutiny on compliance, which makes the function too compliance driven
- Lack of time due to administrative duties
- Mobility brand only viewed as transactional within the business
- Company culture or structure
- Less developed skills within the mobility team pertaining to a) the ability to provide input into business and talent objectives; b) the ability to manage and report on mobility costs and spending
- Lack of training to support their role

Given that this survey addressed the barriers and challenges that global mobility functions face in functioning as business partners, but not how these affect GM transformation, more research is needed to gain insight into how these and potentially other barriers and challenges hinder the GM function in transforming into a strategic function. This paper presents such research also by exploring the characteristics of the role of the GM function and GM specialists, which the next section addresses.

2.3.2 Characteristics of the Global Mobility function and GM specialists

To better understand the transformation of the GM function into a strategic function the model of Robb and Au (2016) is utilized, which identifies the characteristics of Global Mobility roles, displayed in Figure 1.

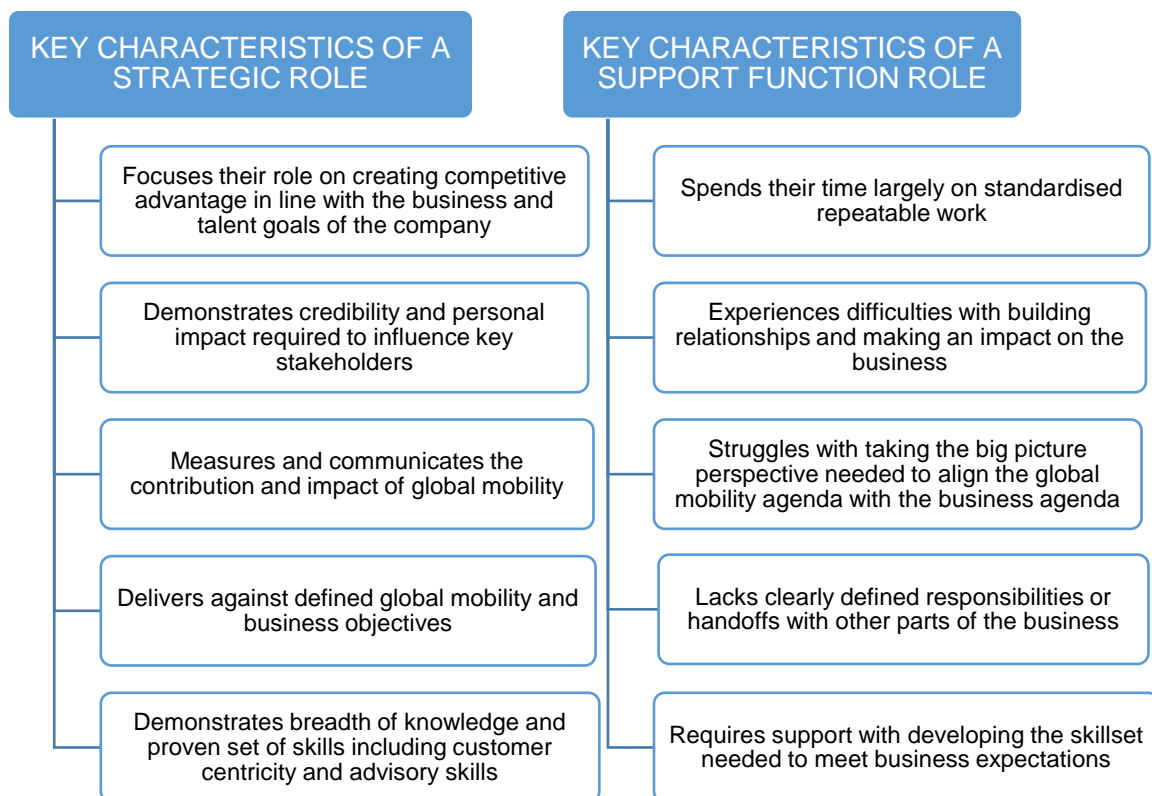


Figure 1 Common identifiable traits of a Global Mobility strategic role versus a support function role.

Adopted from Robb, A., & Au, A. (2016). *The Changing Role of Global Mobility: Strategic or Supporting Role?* London, UK: Deloitte.

In addition, this paper zooms in on the characteristics of GM specialists to assess their capability of performing in a strategic role. In so doing, this study draws upon HRD literature, more specifically, the distinction between what Deloitte (2011) has described as 'lagging' versus 'leading' HRD specialists. The important differences between a lagging and a leading HRD specialist highlight that, to operate effectively as a leading specialist, there must be a strong focus on strategic issues that contribute to business growth and competitiveness. Instead, specialists are too focused on transactional work. The specialist must also have the skill to take a big picture perspective regarding organisational strategic priorities and goals and must project personal impact and credibility to have an influence on key decision makers. In addition, specialists need to be viewed as vital to business success; this requires HRD professionals to link their targets to key areas of business results (McCracken & Garavan, 2015). Translating this 'lagging and 'leading'' concept into a Global Mobility context provides a theoretical foundation to empirically explore the characteristics of GM specialists who are either not or are effectively performing a strategic role. Table 1 is the adapted version of the model of Deloitte (2011) to be used in the empirical exploration.

Table 1 'Lagging' and 'Leading' GM specialists

Lagging	Leading
Retain large proportion of their operational duties	Spend their time primarily on strategic tasks that contribute to key business priorities
Struggle with making an impact in the business	Clearly measure and articulate the value they bring to the organisation
Find it difficult to balance business and GM agendas	Effectively deliver against aligned SGM and business agendas
Lack clearly defined responsibilities or handoffs with other GM/HRM areas	Having a clear and transparent role to play in SGM service delivery
Require further support with critical business skills or GM skills	Are considered top talent within the organisation

Adapted based on: Deloitte (2011). *Business driven HR: Unlock the value of HR Business Partners*. London: Deloitte.

The two presented models form the theoretical foundation to empirically explore the characteristics of the GM roles and specialists in order to unravel why GM functions struggle to transform from a tactical/transactional into a strategic function.

3.0 METHOD

The method of research is an exploratory, qualitative study using an interpretivist paradigm to allow the emergence of context-specific patterns and to gain a 'deeper' understanding of social phenomena (Gill, Stewart, Treasure, & Chadwick, 2008; Patton, 2002; Piekkari, Welch, & Paavilainen, 2009). This method is most appropriate when there is a lack of deep insight into the study phenomenon, in this study, the transformation of the global mobility function into a strategic function to create value for the globally mobile employee and the business.

3.1 Sample and procedure

The sampling frame was created by non-probability sampling techniques. The first sampling method is purposive sampling (Creswell, 2013), based on the author's professional network built through the Expatis Academy, through LinkedIn and at the Forum for Expatriate Management (FEM) event in Amsterdam on 22 March 2018, used to select participants who were likely to provide meaningful data for the study. Prospective participants were contacted through e-mail to request their participation in this study.

The second sampling method is snowball sampling (Creswell, 2013), where the participants were identified through interviews with those participants in the purposive sampling framework.

The sample consisted of Global Mobility professionals -either employed by MNCs or independent, self-employed GM consultants- and the internal and stakeholders of the Global Mobility function, such as Human Resources (HR), Compensation and Benefits (C&B), Talent Management (TM), relocation consultants and immigration/tax experts, business leaders and expatriate and repatriates, depicted in Figure 2. By empirically exploring the views of Global Mobility specialists and the GM function's internal and external stakeholders this study provides multi-actor perspectives on the transformation of the GM function into a strategic function.



Figure 2 Internal and External Stakeholders of Global Mobility
Adopted from The Expatis Academy (2018).

The total sample comprised 37 participants¹. Table 2 presents the sample profile, showing the distribution in job position, industry, nationality, country of residence. Participants originated from countries across America, Europe, the Middle East, and Australasia, with the Netherlands being the dominant country in terms of respondents' origin and current, prime work location. The majority of respondents were male (67%).

16 participants had never lived and worked abroad, whereas 21 participants had lived and worked in the following locations: Australia, Brazil, Canada, China, Dubai, Germany, Guadalajara Area, Mexico, Guatemala, Honduras, India, Italy, Indonesia, Latvia, Morocco, New Zealand, Pakistan, Switzerland, Turkey, Saudi Arabia, Singapore, UK, USA. 8 participants were expatriates at the time of participation in the study.

Table 2 Sample profile global mobility

Variable	Dimension	Count
Stakeholder type	Global Mobility Head/manager/specialist	12
	Global Mobility consultant (external)	11
	Global Compensation & Benefits Head/specialist	2
	Relocation/move management specialist	1
	Immigration lawyer/specialist	3
	Tax adviser/Head of Tax	1
	HR/People director/business partner	6
	Intercultural Trainer	1
Nationality*	American	5
	Australian	2
	Belgian	1
	British	6
	Canadian	1
	Danish	1
	Dutch	10
	French	1
	German	1
	Indian	6
	Italian	1
	New Zealander	1
	Portuguese	1
	Swiss	2
Turkish	1	
Country of residence*	Denmark	1
	Germany	2
	India	4
	Singapore	1
	Switzerland	2
	The Netherlands	16
	UK	7
	USA	4
Gender	Female	12
	Male	25
Type of industry	Consultancy	12
	Consumer Electronics & Medical	2

¹ This sample is an extraction of a wider sample including 76 expatriates and repatriates as part of a broader study on global mobility.

	Energy & Power	2
	Food	1
	Global materials science and manufacturing	3
	Hospitality	1
	Legal	4
	Logistics	1
	Materials and automation handling	2
	Paints and coatings, specialty chemicals	1
	Relocation and international moves	1
	Technology & engineering	5
	Testing, Inspection & Certification	1
	Travel	1
Organisational tenure	Range	2 months to 20 years
Expatriation experience	No	16
	Yes	21
Foreign work locations and residence	Africa, Australia, Brazil, Canada, China, Dubai, Germany, Guadalajara Area, Mexico, Guatemala, Honduras, India, Italy, Indonesia, Latvia, Monte Carlo, Morocco, New Zealand, Pakistan, Switzerland, The Netherlands, Turkey, Saudi Arabia, Singapore, UK, USA	
Total sample size		
N=37		

*Numbers/percentages do not round up to 100%, because some participants had double nationalities or multiple residences.

3.2 Data collection

Given that this study is exploratory, interviews are a suitable method of data collection (Dickmann & Cerdin, 2014; Gill et al., 2008). Interviews can be used to explore the views, experiences, beliefs and motivations of individual participants (Gill et al., 2008). The interview protocols contained both structured and semi-structured questions, that would allow for probing where information seemed to be leading to deeper or unusual insights (Yin, 2014).

Sample questions were:

"How do you view the purpose and the future of global mobility and the role it plays in contributing to business success?"

"In what does the Global Mobility function and you as a Global Mobility professional within this organisation excel?"

"How do you ensure the alignment between Global Mobility and the business strategy?"

Prior to conducting the interviews, the interview protocol was provided to the participants through e-mail, to give them insight into the questions. Participants were also given assurance about confidentiality of their identities and the interview data.

Interviews took place between April and September 2018, either face-to-face, or via telephone, WhatsApp call, Go-to-meeting, Webex or Skype (because of geographical distance) and lasted between 45-60 minutes.

Most interviews were conducted in English, but most Dutch respondents were interviewed in the Dutch language. The Dutch interview responses were back-translated into

English, thus following the back-translation technique, in which a source language is translated into a target language, and the target language is, in turn, translated back to the source language; discrepancies between translations are then corrected (Teagarden et al., 1995) to ensure validity of the translations.

Data collection continued until repetition of information and confirmation of existing conceptual categories, i.e. "category saturation" (Corbin & Strauss, 2008) occurred. The member-checking technique (Creswell, 2013) was used by presenting the transcripts to the interviewees to verify the accuracy and completeness of the information to improve the validity of the research.

3.3 Data analysis

Gathering and analysing data was conducted concurrently in line with descriptive qualitative approaches, thus adding to the depth and quality of data analysis (Vaismoradi, Turunen, & Bondas, 2013). Inductive content analysis was performed to derive coded categories from the text data (Vaismoradi et al., 2013). What followed was summative content analysis to explore salience in the sample (Rapport, 2010). The frequent occurrence of words or terms, such as 'alignment', 'transactional', 'buy in/commitment' could not only indicate greater importance for participants in relation to the transformation of the GM function, but it might also reflect greater willingness or ability (Loffe & Yardley, 2004; Shields & Twycross, 2008) to talk at length about the manifestation of challenges that GM functions face in their transformation journey. The analysis resulted in new insights into the studied phenomenon, thereby the study has increased the understanding of particular phenomena to inform practical actions (Krippendorff, 2004). The next section presents the findings of the study.

4.0 FINDINGS

This section presents the findings of research on the transformation journey of the Global Mobility (GM) function into a strategic function, addressing the factors that help and hinder this transformation.

4.1 Global Mobility transformation: the journey towards a strategic function

This study revealed that there are a number of challenges in the transformation of the GM function from an operational/tactical/transactional into a strategic function. These boil down to characteristics of the GM function and GM specialists and the view on the purpose, role and future of the role of global mobility:

The operational quagmire of a process-driven approach

The study revealed that most global mobility functions continued to fall into the operational quagmire of a purely process-driven approach, rather than a strategic approach. Respondents underlined that Global Mobility has tended to focus on costs savings rather than building more agile, business driven HR/GM functions; the focus was on the execution side, mainly on compliance and respondents admitted that at the current level the GM function is very transactional and too service-driven. This was partly due to the fact that the GM function in some organisations had been relegated to logistics and an administrative function. Yet, respondents were engaging with third party vendors to do the transactional GM work, which would free up GM to spend their time primarily on strategic tasks that contribute to key business priorities.

More worryingly, the execution of processes was not always smooth and some functions struggled in getting the basics right. This resulted in a focus on strengthening the operational aspects rather than the strategic aspects.

This was the so-called 'actual' situation. In the 'intended' situation respondents foresaw the GM role moving away from execution through to Talent Management (TM), international strategic workforce planning, policy design and review on to the development of new markets. Integration of GM and HR was a likely scenario in their minds to be more strategic. One respondent² captured the essence of the current transforming GM role as follows:

"The GM function is shifting from a compliance and administrative focus towards becoming a purpose-driven mobility function, a strategic business partner that helps the business to assign people across borders and creating positive employee experiences. Compliance is a hygiene factor, but should not be the main focus. Mobility functions are leaving their silos and are engaging more and more within HR and the business. That is ultimately key, no overlap, but alignment. To thrive in the future, Mobility teams need to engage in the purpose of creating positive assignee experiences. Get an understanding of costs and risk and expansion plans into new markets." (Cade, Managing Director, Strategic Global Mobility Advisory, Switzerland³)

A lack of 'foot in the door' versus 'shut the door in my face': Respondents mentioned that the business often did not involve GM early on in the process to ensure a smooth international relocation and to prevent unnecessary costs or delays in project execution. In fact, some respondents mentioned that some businesses kept the door shut for the GM function, because GM was perceived to be too complex, a 'necessary evil':

"At higher level management, people are very aged and to make people change their minds and see the relevance of change is really tricky. My expertise is not treated by higher management as expertise, but as a stumble block. They always see the GM function as bringing bad news" (Maisie, Global Mobility Specialist, Netherlands).

This resulted in 'whale herding' and 'fancy footwork' by HR/GM (Gwenllian, Global Mobility Specialist and Compensation & Benefits Specialist, NL) to ensure a smooth, speedy international relocation process in compliance with regulatory, statutory and contractual requirements. Hence, this a lack of receptivity of senior management and the business for ideas, suggestions and advice from GM inhibited the function in its transformation journey to a strategic role.

Poor organisational culture and architecture: A Strategic Global Mobility function is an expression of a supportive organisational culture, aimed at effectively and successfully deploying, developing and retaining expatriates and repatriates. However, the findings reveal that the organisational culture in some organisations was not supportive of the GM function and herein lies one explanation why the GM function struggles to become a strategic function: most GM functions are embedded in hierarchical organisations, and several respondents commented that top management was typically not committed to Strategic Global Mobility management, does not think the topic deserves attention, does not have or communicate its vision on this topic and does not make available the resources to transform global mobility from a tactical/transactional function into a strategic function. Essentially, the status, role and profile of the GM function is influenced by the strength of the belief of senior management in the added value that GM can contribute to the organisation. The lack of top management belief of the value of GM had a negative influence on the transformation of GM into a strategic function.

² The names of interviewees are fictional to protect their anonymity.

³ The country indicates the current residence of the respondent, albeit the person may have executed the particular role in one or multiple foreign locations.

Branding & value proposition: Respondents mentioned a lack of awareness about the importance of the GM function among business leaders. They also mentioned that they don't get the credit and appreciation for the complexity of the GM function. An explanation they provided was that board members without international experience don't understand the value of GM. They also mentioned the necessity to manage expectations of the stakeholders, mainly assignees, business leaders and vendors about the policies and deliverables of the GM function, because mismatches of expectations had led to frustration, which harms the brand image of GM. Consequently, the respondents acknowledged the need to develop a strong employee value proposition as well as marketing and promotion of the GM function to increase the GM brand, which will help the GM function transform into a strategic function.

A lack of disrupt & reframe capacity: GM professionals expressed that a major challenge was for the business to give them a seat at the table, not viewing them as merely a service provider (actual) but viewing them as a business partner (intended), giving them the opportunity to provide strategic input and to help them in posting employees internationally in an efficient, strategic manner. Yet, the caveat was that GM often did not have a seat at the executive table and was not viewed as an equal partner in making strategic decisions about global mobility. One respondent offered a plausible explanation: *"GM does not have a strong enough voice to say to the business or function this is not the person to be sent on an international assignment, this is going to fall out."* (Max, Head of People - EMEA / HR Director, United Kingdom)

Another explanation offered by some respondents was the lack of competencies of GM specialists. The culprit was the training and background of GM, which is often in HR service delivery and is not on the strategic side. Being a business partner, operating at a strategic level, requires a broad and deep skills set, which some respondents acknowledged global mobility professionals often lack; this results in a lack of credibility about their competence and the function's added value to the business. The following excerpt is exemplary: *"GM people are not as business savvy as they should be. That does not help if they want to argue a case. You need to know the business. Otherwise you get no credibility."* (Harley, Global Head of HR, United Kingdom)

Hence, the capability to 'disrupt' the view of executives on the GM function will help the GM function in its transformation into strategic function.

Storytelling: The ability to tell the business a compelling story about how GM can promote efficient and effective deployment of international assignees in a compliant manner. Respondents termed this 'Impression Management', exemplified in the following statement: *"Get visibility with business leaders by showing examples of costs to the MT. For example, we have a few people who are going to repatriate by 30 June and with a handful of them no next career steps are known. When you show this to MT then you draw their attention."* (Sai, Head of international Mobility, Netherlands)

This storytelling needs to be supported by valid metrics and data to build a sound business case, defined as *"the tool or document that defines a specific problem, proposes a solution, and provides justifications for the proposal in terms of time, cost efficiency and probability of success"* (SHRM, 2018). However, the caveat was the absence of valid metrics and data. As one respondent expressed:

"We only just recently have the ability of the extent of the metrics. So we don't do any ROI, we are not even aware of the total costs add ups. It does not feel like any questions are being asked, do we do too much or no enough expatriation, is it working for us? Generally, we tend to get it right in terms of who we choose to move and who we don't. There are exceptions to the rule, but nobody is asking for ROI on it." (Abel, HR Director, United Kingdom)

A lack of alignment between Global Mobility and the business and talent strategy and objectives:

Many respondents mentioned the gap between GM and the business and Talent Management in terms of supporting business strategy and developing talent. They did not have sufficient understanding of the business strategy resulting in non-alignment of the Global Mobility with the Business Strategy to achieve business goals. Respondents mentioned that building relationships with talent management was a priority for them. Respondents did acknowledge that being strategic means being aligned with business objectives and they were working on this through collaborative efforts:

"I see more collaboration between GM and HR in connection with talent development as a part of HR, strategic workforce planning and staffing. That role, the triangle of L&D, HR, recruitment and placing GM within that triangle. Then GM is positioned much better than being a loose unit that provides support only in relocating someone from a to b. You need to embed GM at that level to enable the function to be seriously involved in conversations about what is going on in the business. Often you see that the business sends someone abroad on gut feeling. So for example, the business sends somebody to Australia all of a sudden and I wonder why they send this person. It worries me. GM needs to be at the frontline to get and provide the right information to send somebody abroad." (Preston, Strategic Human Resources Business Partner, Netherlands)

In sum, the current findings add substantially to our understanding of the transformation journey of the global mobility function into a strategic function. The inference from the findings is that GM functions and GM specialists are 'tightrope walkers', performing a balancing act in their roles to ensure that all tactical/transactional processes run in a smooth and compliant manner whilst at the same time making efforts to transform into a strategic function by liaison and engagement with stakeholders as business partners, focusing on alignment with the business and talent goals and communicating the contribution and value of the global mobility function.

5.0 DISCUSSION

The objective of this paper was to provide insight into the factors that hinder and help the transformation of the Global Mobility (GM) function into a strategic function (SGM) within global organisations, shedding light on the SGM intended-actual gap, i.e. Global mobility in a tactical/transactional/support role (actual) versus a strategic role (intended). The paper posed the following thesis statement guiding the study:

Thesis statement:

The lack of liaison and engagement of the Global Mobility function with stakeholders, and the lack of capabilities of the GM function and GM specialists inhibit the transformation from a tactical/transactional GM function into a strategic GM function.

This paper contributes to the literature in two ways.

First, by integrating Global Mobility and Human Resource Development (HRD) literature the paper identified the characteristics of the roles of the Global Mobility function and Global Mobility specialists to empirically explore the influence on the transformation of the Global Mobility function into a strategic function.

This findings of the study have revealed that the lack of liaison and engagement with key stakeholders, lack of alignment between business strategy, talent management strategy and global mobility strategy as well as lacking capabilities to be a strategic business partner and make a sound business case inhibit GM functions to transform into a strategic function. Second, by presenting a 'Global Mobility Specialists Competencies' model, identifying the capabilities required to fulfil a business partner role and advise the business on strategic global mobility issues that impact the performance and effectiveness of the global organisation.

In response to the first research question "*In what way do the challenges in the internal and external environment influence the transformation of GM into a strategic function?*" the findings show that in the current volatile, uncertain, complex and ambiguous (VUCA) world, one of the main challenges for the GM function was the increased scrutiny on compliance, which makes the function very focused on compliance. This is understandable, because 'flawlessness' in compliance is highly important, because of the multiple risks that come with non-compliance (Dickmann, 2018). The rising administration is limiting the ability of global mobility to provide strategic input and as a result has contributed to the transactional brand of mobility. In line with previous research the findings show that global mobility specialists' focus on operational processes and ensuring "transactional success" in delivering process-driven global mobility programs pose constraints on the global mobility function to focus on value-driven and strategically directed activities (McNulty & DeCieri, 2016; Santa Fe Group, 2018). The caveat is that such a utility approach to global mobility is concerned predominantly with determining the cost-effectiveness, rather than the overall global mobility effectiveness, which hinders the transformation of the GM function into a strategic function.

Another challenge was the organisational culture, which should be supportive of global mobility as both a strategic enabler and business partner (Robb & Au, 2016; Robb & Odell, 2015). Yet, in many respondents' organisations the culture was one where senior managers and the business were often not receptive to the expertise of the GM function, which inhibited GM to transform into a strategic function. Overall, the present study confirms findings from The Deloitte Pulse survey (Robb & Au, 2016) that global mobility functions face barriers and challenges in becoming more strategic, due to:

- Lack of time due to administrative duties
- Mobility brand only viewed as transactional within the business
- Company culture or structure
- Less developed skills within the mobility team pertaining to a) the ability to provide input into business and talent objectives; b) the ability to manage and report on mobility costs and spending
- Lack of training to support their role

The answer to the second research question "*What is the relation between the liaison of the Global Mobility function with internal and external stakeholders and the transformation into a strategic function?*" needs to be viewed in the light of business awareness and strategic alignment.

Respondents spoke about the lack of connection and engagement with the business, TA/TM, C&B, HR, Payroll, Staffing, Legal, Finance and Tax, which resulted in a lack of visibility within the organisation. This is concerning, because liaising and engaging with stakeholders is essential to a) understand and support the business objectives of international assignment; b) establish good working relationships; and c) clarify the rationale and aims of the GM function and how the GM function can add value to the business.

Respondents acknowledged that creating meaningful interactions, relationships and mutually beneficial partnerships with key stakeholders was required to allow the GM function to move towards aligning the GM agenda with the strategic goals of the organisation and to help the organisation and international assignees to achieve their overall objectives and successful outcomes, supporting the contention of Robb and Au (2016) and Carbery (2015). However, they struggled with taking the big picture perspective needed to align the global mobility agenda with the business agenda, and consecutively effectively deliver against aligned SGM and business agendas substantiating the contentions of Robb and Au (2016) (Figure 1) and Deloitte (Table 1).

Respondents expressed that in a strategic role GM teams would have representation within top management and board meetings to become aware of business changes and its implications, to understand the direction of the business and upcoming projects, understand the intent of the company and its leaders, the longer-term objectives, the structure of the organisation, its culture and the key internal stakeholders (K2 Corporate Mobility, 2016). Accordingly, the GM function can rethink how it operates to link their activities to business needs. However, representation within top management and board meetings was reality only for those respondents in HR business partners role, but not for many of the GM specialists. This highlights that GM specialists are experiencing difficulties with building relationships and making an impact on the business (Robb & Au, 2016) (Figure 1), which hindered them in fulfilling a strategic role.

According to the Santa Fe (2018) survey there will be increased involvement of the Global Mobility function in talent management (TM), where GM, TM and Reward are fully aligned (Robb & Odell, 2015). Among respondents building relationships with and involvement in talent management was their intention in order to support the deployment of people effectively and in a compliant manner aligned to the business strategy, but not current reality for the majority. There was little connection, engagement and alignment with TM, which repressed GM functions to be involved in strategic international workforce planning, attraction, succession and retention of talent. Yet, alignment of the GM and TM strategies is imperative to a) to ensure that assignees are sent abroad who have the appropriate set of drivers for the objectives of the organization; b) enhance the employee experience and add value to the business (Dickmann, 2018).

In response to the third research question "*How do GM professionals and their stakeholders view the role, purpose and future of the global mobility function?*", the study found that supporting business strategy and developing talent was how respondents envisioned the future role of the global mobility function; Yet, respondents acknowledged the gap between GM and the business and the little alignment of GM with talent, which they opined was needed to ensure that talent deployment and development/mobilization is aligned to business strategy. In line with previous research they opined that on a strategic level, aligning GM to business and HR strategies is highly important in order to enable and support the business in creating value (Dickmann, 2018).

What is also important in a strategic role is that GM specialists as strategic advisors understand the manifold ramifications of their organization's strategy and the diverse GM avenues that could be pursued to realize their MNC's ambition (Dickmann, 2018). Respondents acknowledged this role of being an adviser to the business, functioning as a trustworthy and reliable business partner, focusing their role on aligning their activities to the organization's strategies (Hughes & Byrd, 2015) and creating competitive advantage in line with the business and talent goals of the company, a key characteristic of GM's strategic role (Robb & Au, 2016) (Figure 1). It is also a key characteristic of GM specialists' strategic role, where they spend their time primarily on strategic tasks that contribute to key business priorities (Deloitte, 2011) (Table 1).

In a strategic role, GM measures and communicates the contribution and impact of global mobility (Robb & Au, 2016) (Figure 1). GM can demonstrate the value and impact of the function by using metrics -tracked via advanced reporting in real time- that are meaningful to the business and data analytics that measure the effectiveness of global mobility (Hughes & Byrd, 2015; Robb & Odell, 2015).

Yet, the present study found that the caveat within GM was that few GM functions conduct data analytics to be able to show the value of the GM function to the business. In part, this was caused by inadequate provision of resources and support for advanced technology to track and measure data, addressed as a deficiency in strategic development (Carbery & Cross, 2015). Practice within organisations suggest that a variety of metrics are used, albeit not very coherently (Carbery, 2015). Respondents reinforced this suggestion: Measurements and metrics, if at all, were focused on costs estimates of international assignments and KPIs. This support the findings from Dickmann (2018) that many companies look at costs primarily to draw up the business case for working abroad and pay less attention to the benefits.

Remarkably, the present study found that for many respondents the often proclaimed value of measuring ROI was a non-issue in their organisations. GM specialists nor the business they served were interested or focused on measuring ROI. A plausible explanation is that ROI is often 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 & Dickmann, 2012; Renshaw et al., 2018). This reinforces the contention that ROI has remained elusive and there is an absence of robust measurement methods (Carbery, 2015)

In fact, some respondents argued that it is complex, if not impossible, to measure GM ROI and to demonstrate a causal link between investment in global mobility strategies and business results. Notwithstanding the challenges in measuring global mobility effectiveness, it remains imperative that GM professionals use measurements and metrics of some sort to create business cases for investment in resources needed for transformational change (Dickmann, 2018).

In sum, given the lack of value attached to ROI, the present study supports the contention of Dickmann and Baruch (2011) that the real purpose of GM lies within the ability to create specific, measurable, achievable, results-focused and time-bound objectives aligned with key organizational objectives, such as enabling certain work activities through filling positions, and then deliver against defined global mobility and business objectives (Robb & Au, 2016) (Figure 1).

Global Mobility of the future is Smart, Agile, Flawless and Efficient (Dickmann, 2018), but this study has shown there is a big 'actual-intended' gap to be filled by GM functions to arrive at this strategic status of the function.

5.1 Limitations and suggestions for future research

The first limitation of this study pertains to the uneven distribution of nationality and country of residence within the purposive sample. The most well-represented group was the group originating from / residing in the Netherlands and the vast majority of respondents originated from Europe. Although the study included respondents from other continents including America and Australasia, this group was underrepresented. Hence, this limits what Sullivan and Baruch (2009) call the "cross-culture generalizability" of research.

The present study only permits theoretical and analytic generalisation. Therefore, we can only generalise to theory and not to a broader population (Eisenhardt, 1989), such as Global Mobility specialists and their stakeholders from a broad range of nationalities in other world regions. Yet, the focus in the present study was not on generalizability, as qualitative studies are typically less focused on generalizing (Miles & Huberman, 1994).

However, future research into Strategic Global Mobility in other world regions to assess the cross-culture generalizability of the present research is recommended.

A second limitation is that, although this study included a variety of stakeholders of the Global Mobility function, i.e. HR Business partners, Talent Management, Third-party vendors, expatriates/repatriates, Tax, Legal, Comp & Ben, it did not include key stakeholders, such as line managers and senior executives.

Therefore, important information on the views and perceptions of middle and top management of global organisations on the Global Mobility function and its roles is missing. The suggestion for future research thus is to include this group in the sample to gain a more comprehensive picture of the factors that hinder and help the GM function to transform into a strategic function.

5.2 Implications for practice

This study has several practical implications for global mobility functions and specialists. For Global Mobility to establish partnerships with the business and transform into a strategic function there are a number of success factors, extracted from the study findings and the Global Mobility literature (Robb & Au, 2016) and HRD literature (Carbery & Cross, 2015):

- **Stakeholder liaison and engagement**

Crucial for GM is to engage with its stakeholders, such as senior and line managers as well as current or future expatriates and repatriates to develop awareness of business strategy, needs and priorities and the issues they are facing to understand how GM can work strategically with the business and support their objectives. Working with key stakeholders in the organisation is also essential for identifying who could serve as advocates of the GM function in order to get support for GM initiatives. Liaison with Talent Management, Recruitment, HR business partners and Compensation & Reward is imperative in order to deploy international assignees in a strategic manner and to ensure that talent and skills gaps are filled and assignments fit individuals' careers.

Such liaison will provide answers to questions such as:

- Why are we sending an international assignee?
- What are the assignment objectives?
- Who should we move?
- What are the benefits for the employer and employee?
- What will the repatriation role be and the longer term repatriate career path?
- What package suits the type of assignment and situation best?

Accordingly, a GM strategy needs to be formulated that is sufficiently flexible to account for changes in individual and organizational needs, business opportunities and challenges. The formulation of the GM strategy should be a collaborative effort involving key stakeholders who are committed to its implementation and to ensure the GM strategy is aligned with business and talent needs and objectives. Developing detailed vendor strategies and source suppliers to execute the tactical/transactional aspects of global mobility is also crucial, such that the GM function can focus more on its strategic role.

- **Reduce the administrative workload** – Decreasing the amount of administration in the role allows the global mobility professional to focus on proactively partnering with the business. Consider ways to decrease the level of administration either through automation, optimisation of processes, shared service centres, outsourcing or internal reallocation of roles. This involves conducting an analysis of transactional activities currently performed and identify how they can be removed or moved to a shared services centre.

- **Branding, role impact and value proposition** – When business partnership is established, this can help enhance global mobility's credibility and impact within the organisation thereby improving the brand of global mobility. By focusing on building a global mobility brand and value proposition, global mobility professionals can shift the perception of global mobility from a tactical/transactional function to trusted advisor on complex global mobility issues. This involves clearly defining and communicating the brand and role delivery capabilities to senior management.
- **Measure global mobility effectiveness** – Define metrics that speak to the business agenda. Best practice companies develop mobility metrics, such as ROE (Return On Expectations), to demonstrate the effectiveness and impact of their global mobility function and programme. The ROE information generated is the input for building a business case for allocation of resources to the GM function and to get 'buy-in' for the Global Mobility strategy. ROE data are also a facts-based means of demonstrating to the business and senior executives the contribution that global mobility is making to the overall organisation and to show how value for the business and international assignees. This will give the GM function more credibility within the organisation and strengthen its *raison d'être*.
- **Organisational culture and support** – Although the focus is often on how the global mobility role should change, the support provided by the organisation to allow this role to function strategically is just as crucial. This requires top management commitment and deep involvement best achieved in a holacratic organisation. This modern organisation type is based on autonomy and tuning work through a system of distributed power of control (Robertson, 2016). The holacracy is inoculated in agile working, which relies on adaptability. It is a way of working in which employees take decision in a self-regulated manner and provide solutions in short cycles. Every employee, as part of multidisciplinary teams, is focused on arriving at the best results for the client by frequently reflecting on business practice and using each other's feedback to make improvements together. This way of working requires competence-trust, the trust that each and everyone possesses the competencies to meet the expectations. Essential is that everyone is appreciated for his/her input and contribution. This requires an organisational culture in which people feel safe to experiment and to learn-on-the-job (Robertson, 2016). In a holacratic organisation global mobility specialists a); are agile and able to adapt to changing internal and external circumstances; b) liaise and engage with stakeholders to arrive at the best results for its clients, i.e. the business and the international assignees; c) have the right set of competencies to be able to add value to their clients; d) feel safe to experiment with new global mobility solution and be recognised and praised for their contribution.
- **Training & Education**– In order to manage the changing role of global mobility and address gaps in know-how and the skills-set of GM specialist, they are advised to engage in formal training and education to enhance their expertise and to equip them with the competencies required to be able to demonstrate credibility and have personal influence. In addition, informal training, such as a) mentoring and coaching by senior managers; and b) temporarily moving to a business unit and work there for a period of time are useful other methods to develop capabilities that would increase the likelihood of being part of the senior top team as a business partner and to work more closely with the line (Carbery, 2015). Finally, it would also be advisable for GM specialists to really experience global mobility, by going on international assignments, which will enable them to view expatriation from the point of view of an assignee and the value it adds to the business.

In turn, this will improve the capability of GM specialists to respond to changing business and external conditions to ensure the expectations of the business and the international assignees are met.

To address the capability gap of global mobility professionals it is recommended that GM professionals develop their capabilities, specifically within four distinct categories of competencies⁴ displayed in Table 3.

Table 3 Global Mobility Specialist Competencies

Competence category	Competencies
Field specific competencies	Knowledge of: <ul style="list-style-type: none"> • the various international assignments types/approaches • compliance risks • social security, tax, law and payroll • health and safety in foreign locations • compensation and benefits • assignee repatriation • research and latest insights on HR and global mobility to innovate and integrate global mobility policies into solutions to meet the expectations, needs and objectives of the business • relation-building and change management skills
Supra-field competencies	<ul style="list-style-type: none"> • a thorough understanding of the global environment involving the social, technological, economic, political, environmental, and demographic (PESTLE) trends facing the industry in which the organisation operates, which affect the organization and its globally mobile employees. • looking beyond the GM profession to gain a detailed understanding of the business including its strategies, culture, structure and the corporate agenda • identifying the main internal and external challenges facing the business and the impact on global mobility strategy and objectives • analyse the key enablers and barriers to strategic alignment between GM, the business and talent management • ability to work independently in a proactive, agile, self-assured fashion to transform the GM function in such a way that it creates value for the business.
Connection competencies	<ul style="list-style-type: none"> • develop relationships and partnerships with key stakeholders and be their sparring partner in business issues and priorities regarding global mobility, speaking the language of the business: have business-driven mobility conversations • cocraft a strategic agenda for global mobility with key stakeholders, defining and detailing a plan for

⁴ This set of competencies is comprehensive, yet not exhaustive, meaning there are many more competencies that GM specialists could potentially develop to perform well in a strategic role. Yet, the competencies presented in this paper would arguably be the essential ones.

	<p>addressing the priorities for action and to specify resource requirements</p> <ul style="list-style-type: none"> networking capacity, join GM networks and Communities of Practice (CoPs)⁵ to disseminate, diffuse, share and gain knowledge
Commercial affinity	<ul style="list-style-type: none"> adopt a more commercial and flexible mindset to develop agile global mobility solutions the ability to establish strategic global mobility performance measures and the ability to collect and analyse qualitative and quantitative data to continually assess global mobility effectiveness and, when required, adjust the global mobility strategy

One respondent captured the essence of developing GM's capabilities through Global Mobility networks/CoPs as follows:

"I think Global Mobility networks and forums are brilliant ways to develop knowledge and share experiences, but I do think that when attending people need to be open minded and allow all to share their opinions. The [name GM network] really tries to allow people at the start of their Global Mobility experience to have a voice and learn from those who are more experienced without fear or prejudice. Our vision is to develop a safe and nurturing environment where people can soundboard ideas and hopefully gain confidence in developing new ways of thinking within global mobility. I think it is essential as Global Mobility professionals, we look to understand how we can work strategically with the business and support their objectives, whilst being mindful of our own, which means we need to adapt and not focus on the ways things have always been done. We are great believers in partnership and see the future of Global Mobility as both vendors and corporates working in harmony and not through being segregated."
(Heidi, Global Mobility Manager, United Kingdom)

With this set of competencies GM specialists will be able to transform from tightrope walkers into knowledge-brokers and linchpins, providing knowledge and developing networks and relationships with the business to create a Global Mobility function that is agile, flexible, responsive and able to make transformation happen in ways that create sustainable value for the organisation. Hence, the message to GM professionals is:

*Make up your mind and don't believe
 It's bad news everywhere
 Take your time and look around
 Because there's something in the air
 There's a feeling that's gaining ground
 And everyone can have a share
 Don't miss your chance
 Take up your stance
 And just be sure that you are there
 It's in your hands now
 To change your fortune, to shape your future
 Be proud of yourself*

(Kylie Minogue)

⁵ A community of Practice (CoP) is a group of individuals who share a common interest in a topic, and who deepen their knowledge of it through ongoing interaction and relationship building in their group (Carbery & Cross, 2015).

6.0 CONCLUSION

The purpose of this paper was to provide insight into the transformation of the global mobility function from a tactical/transactional into a strategic function. The paper investigated the role changes required to transform global mobility into a strategic function and the challenges and barriers this poses. By exploring the characteristics of the roles of the Global Mobility function and Global Mobility specialists this paper provided insight into why GM functions struggle to transform into a strategic function: The lack of liaison and engagement of the Global Mobility function with stakeholders, and the lack of capabilities of the GM function and GM specialists inhibit the transformation from a tactical/transactional GM function into a strategic GM function. By contrast, enabling factors are the liaison and engagement with internal and external stakeholders, being a trusted and credible business partner and alignment of the global mobility strategy with the needs, strategy and objectives of the business.

Finally, this paper presented the required know-how, skillset and role behaviours of global mobility specialists to be able to fulfil the role of business partners and transform the function into a Strategic Global Mobility function and create value for the business and the international assignee.

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