

The State of Global Mobility 2025

Connecting the dots between business, talent & movement
across borders with data from 200 experts



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Foreword



By Hanna Asmussen,
CEO & Co-founder of Localyze

After a few turbulent years in the global market and many things changing along the way, how are leading companies looking at 2025 and even more importantly — how are they gearing up their Global Mobility strategies?

From crisis mode planning, to reduced headcount and cost-cutting measures to balancing the pressures of a new world of (more) flexible working, People leaders and their teams have had to navigate the last years on the back foot.

Now, it seems like we can finally move into a more long-term plan and this is an opportunity we don't want to miss!

So, we decided to find out what the drivers going into 2025 would be. What are the cross-border workforce priorities for global companies? How are they moving their employees across the world? What are they investing in, and where are they slashing budgets? And how are they planning to navigate a global world driven by rapidly-evolving tech, shifting immigration laws, and growing compliance pressures?

These are questions we have heard in the market, from both customers and prospects, and that we look to answer in this latest report.

It reveals the insights and trends from over 200 global enterprise business leaders and People professionals based in Germany, the Netherlands, and the UK. And, it goes deep into qualitative experience from leading experts at SumUp, Telefonica, BCG, Einride, Bitkom and more.

As we look ahead to 2025, businesses are stepping into a new era of stability. Expansion and international growth are slowly coming back onto the table, and Global Mobility budgets are slightly increasing instead of shrinking.

Leading companies are renewing their investment in both short- and long-term mobility programs and crafting innovative policies for hybrid, flexible work.

At the same time, the voice of the talent market — especially the younger generations — can no longer be ignored.

They're demanding cross-border work opportunities, driving a surge in international trainee programs, mobility initiatives, business travel, and workations. But with these opportunities come new challenges in compliance and risk management, and companies are looking at ways to solve these at scale.

So, how are these critical decisions being made? Who's influencing the strategy behind where to expand next or how to shape short- and long-term mobility programs? Despite 64% of respondents confirming that international growth is a top priority for next year — and with 65% emphasizing visa and permit renewals as key investments, plus 58% offering short-term mobility benefits like workations — surprisingly, 4 in 10 People leaders still lack a voice in strategic decisions at the executive level.

But there's hope on the horizon. A growing number of leaders are recognizing the strategic value of Global Mobility programs in response to evolving market conditions. With a resounding 90% agreeing that Global Mobility positively impacts employee satisfaction and retention, the tide is turning in favor of those ready to embrace the future.

As we look into that future, we want to make sure we cover the key strategic topics for Global Mobility professionals to help shape the agenda for 2025 and put Global Mobility on senior management's radar. We identified three key topics that this report will dive into and that experts at the forefront of these challenges will share their experience about:

1. Global Mobility's role in the bigger business picture
2. How teams are handling the workload
3. Where compliance and policies come into play

A special thank you to all the expert contributors in this report! We look forward to an exciting 2025, with hopefully more positive news for the world of Global Mobility!

Global Mobility to be a driving force for international growth



“The ambition of the business did not diminish during challenging times, so this required some creative thinking and prioritization. Looking at 2025, things may still be a little uncertain, but we are definitely looking at a more positive sentiment for the long term.” – **Sharon Lion, Director International Mobility at Einride**

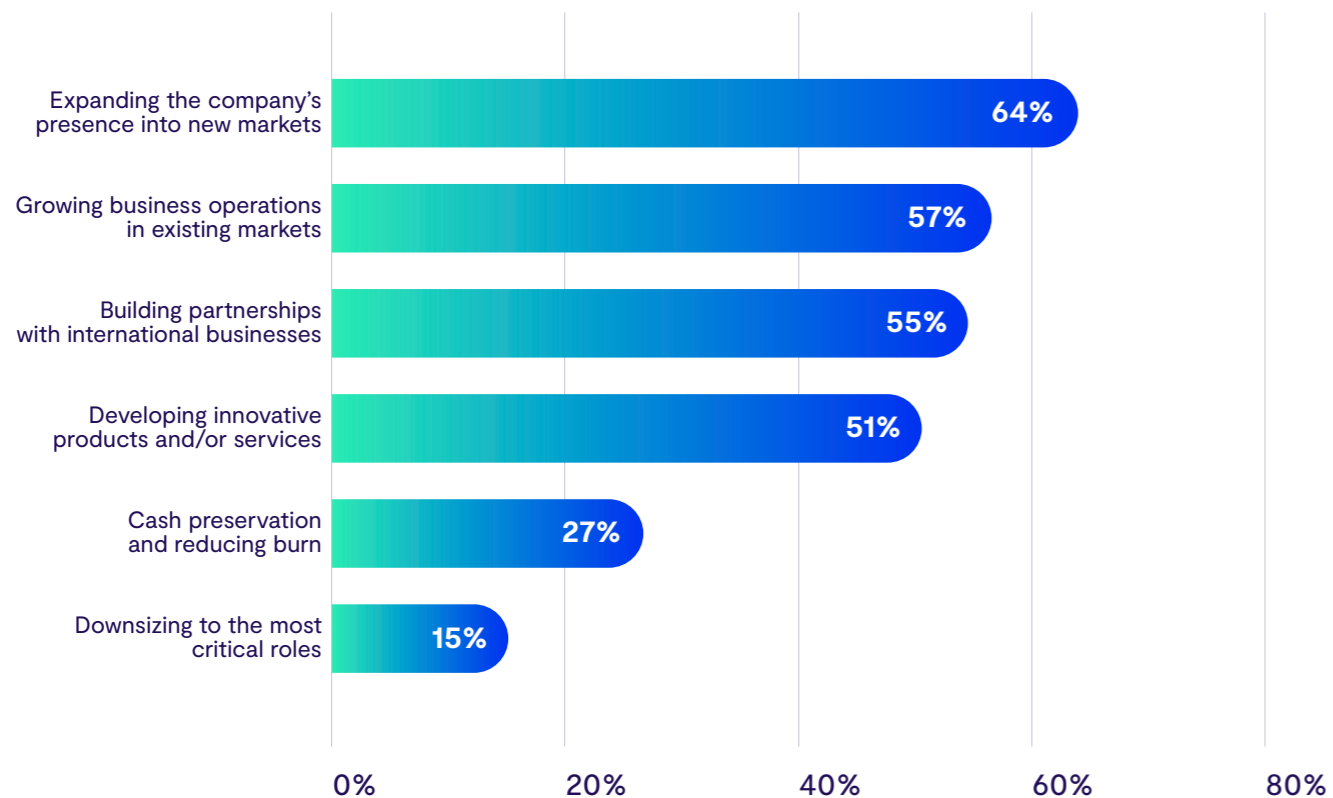
The word “adapt” has gained an entirely new meaning for People teams. From setting up remote work, to hiring talent from any part of the globe, to restructuring teams and redistributing budgets while moving talent across the world — they’ve had to drastically change course enough times in the past 3-4 years to feel like decades have passed instead.

As Localize co-founder Lisa Dahlke thinks back on her years working as a Global Mobility specialist, she shares: “Wherever the business needs to go, People teams are charged to get it there.”

So we can’t hope to set any reliable Global Mobility predictions without first digging into where business strategies are headed. Will enterprises refocus on growing their market presence, maintain a status quo, or downsize?

We asked 200 business executives, People leaders and Global Mobility experts — and the responses point towards a renewed focus on growth (Figure 1).

Figure 1: What kind of business objectives is your company aiming to achieve in the next 12 months?



The vast majority shared that their companies are looking to grow their operations, with more than half confirming they’re focused on expanding in their existing markets.

More importantly, **64% confirmed that a core business priority is to grow internationally.**

While cost consciousness is not quite a thing of the past yet — 27% of respondents said they still need to prioritize cash preservation, and 15% suspect they are facing more layoffs in the next year — indicators of “slowing down” are overshadowed by a more positive outlook.

So it seems like People teams will be back to looking beyond their usual borders in 2025. What will it take to achieve these goals?

Successful international growth will lean on a clear picture of where to open new entities, where employees can and can’t work, how to acquire new talent or retain high performers, the list goes on.

These are all important points that will define People teams’ roadmap for the coming months into 2025. **So how much of an opportunity do they have to guide these decisions, rather than just be tasked to carry them out?**

Figure 2: How much influence do the people managing your Global Mobility program have over the following business decisions?

	Not involved in this decision	Feed into the decision, but are not a primary decision maker	One of a few primary decision makers	Primary decision makers
Which countries to open new offices and entities in	15%	25%	29%	32%
Where employees can work	6%	27%	30%	38%
General talent acquisition strategy	7%	27%	32%	36%
When and how to hire talent from abroad	6%	26%	34%	36%
When employees can work abroad and under what conditions	4%	26%	34%	37%



“Having sharpened their fundamentals, companies’ focus is now shifting back to expansion, with an emphasis on sustainable growth. International expansion, in particular, has become increasingly crucial, as diverse markets respond differently to economic challenges. By entering new markets with a well-structured business case, companies can uncover valuable growth opportunities, even in uncertain times.” – **Max Rimpel, Partner at General Catalyst**

The answer is the classic “It depends.”

For example, only 60% said they’re either the primary decision-maker or are part of the wider committee making the final call on where to open new entities (Figure 2).

That number might look high, but in reality it suggests that there is still **a 4 out of 10 chance that People teams don’t have an active say**, despite the fact that they have invaluable insights on local labor laws, taxation, or visa and permit rules.

“I think there’s still a lack of understanding between those driving Global Mobility inside the company and other parts of the business, such as Talent Acquisition, People managers, senior leadership, and the C-Suite,” shares Pavlína Kopečná, who has led Global Mobility programs both in-house and within an agency.

“Getting the understanding and ‘a-ha!’ moments from leadership is the challenge. The agenda is complicated and multi-layered.”

“When explaining our work, we tend to simplify things to avoid losing the audience’s attention (which happens very quickly), so it creates the image that our work is simple, but it’s not.”

There are areas where People leaders seem to have more influence. 70% are actively involved in decisions such as when employees can work abroad and under what conditions to maintain compliance. Respondents also seem to have a strong influence on the specifics of finding talent and when to look beyond borders for the best candidates.

If teams are tasked with big moves on an international scale, do they have the resources to achieve them? In a sharp contrast to more austere strategies in past years, 55% of respondents said their budgets have grown (Figure 3).

Half of them report an increase of 5 to 10%. A large chunk (38%) confirmed they had even more at their disposal — between 11% and 20% more.

Overall, these are positive findings for People teams and the future of Global Mobility, but they also mean the pressure is on to make the right investments.

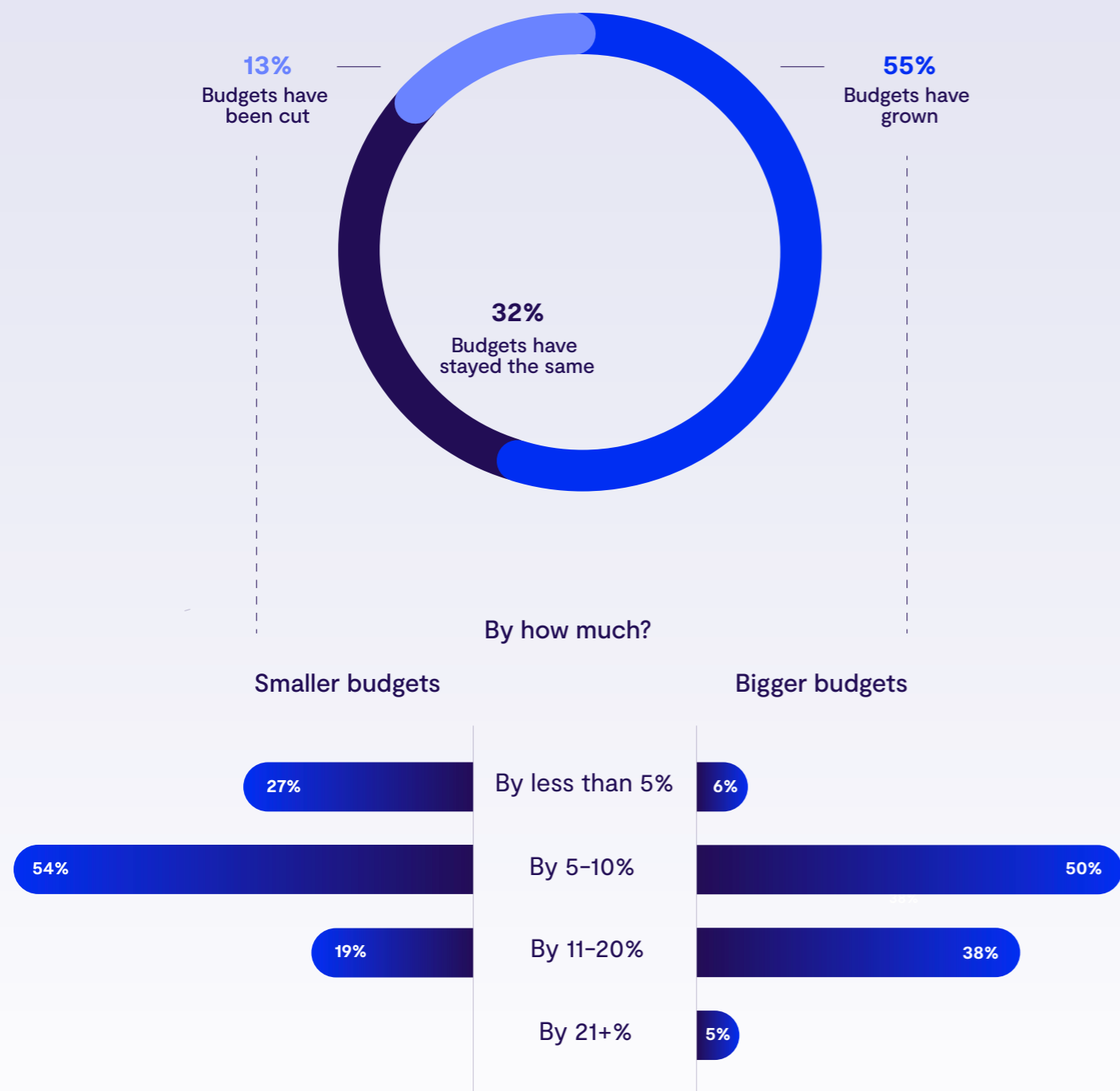
What kind of Global Mobility strategies and initiatives should companies invest in? How will they handle the workload, and where do they expect the most impact? All questions we explore in the next section.

Global Mobility: Year-over-year trends

If you're looking for more numbers on how Global Mobility programs benefit companies' bottom line, why not check out this resource too?

[Download report](#)

Figure 3: How have your Global Mobility budgets changed in the past 2 years?



How companies are managing their Global Mobility strategies

We can't talk about Global Mobility admin without first touching on who's managing it.

So we asked respondents to share which team is responsible for the Global Mobility programs in their organization — 46% said it's part of their People Operations function, while 30% said it falls under Rewards and Benefits (Figure 4).

This may be in part because Global Mobility isn't just about hiring talent or offering flexible work anymore — use cases are becoming much more complicated, as Figure 5 shows.

Figure 4: Which function within your organization is the Global Mobility program a part of?

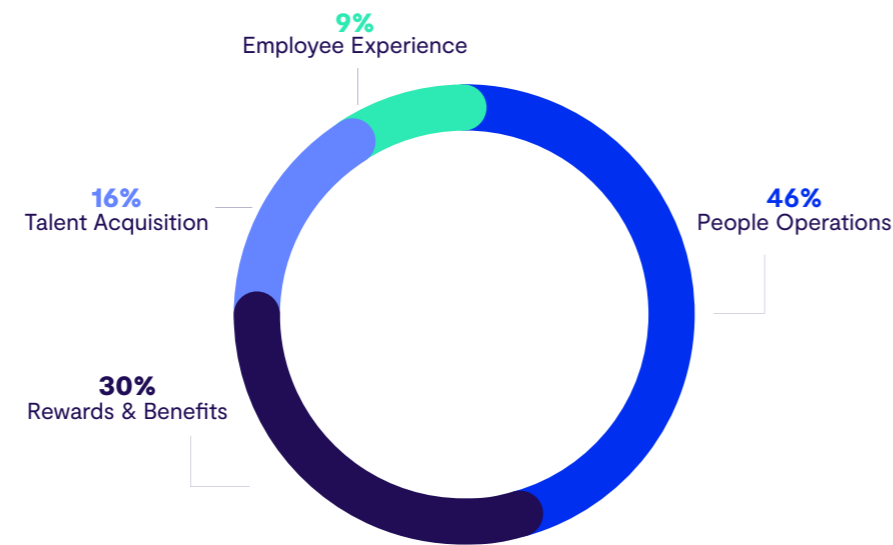
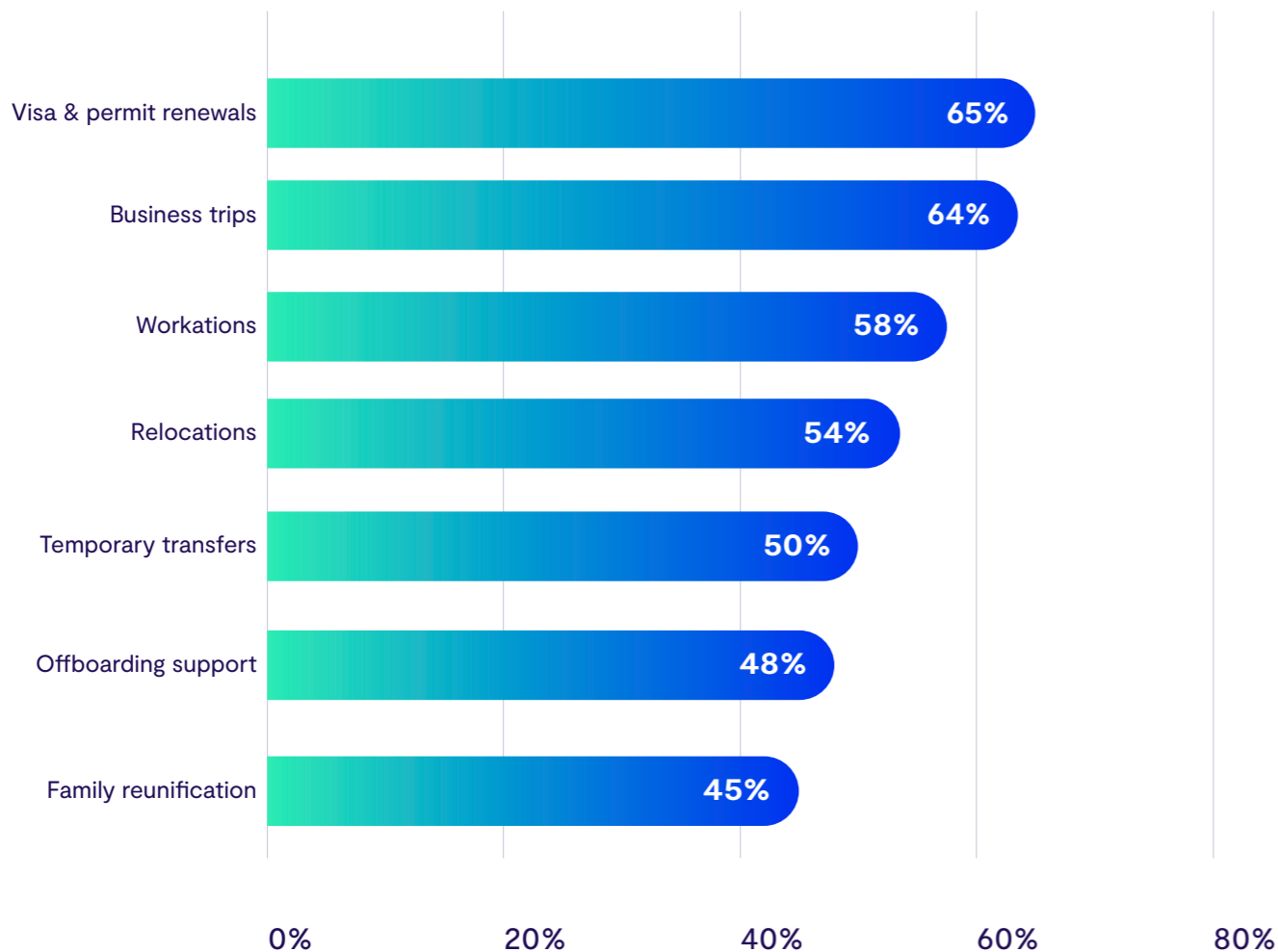


Figure 5: Which of the following Global Mobility benefits does your company offer to employees?



“We are in an expansion phase. Our main role is to support by planning short- and long-term assignments to new locations and make sure that the transfer of know-how is properly managed.”
 – Silvia Navone, Global Mobility Manager at BioNTech



“Flexibility and hybrid working models are key in today's working world. Global Mobility, supported by Localize, which offers visa and immigration services, helps us bring global talent to Germany. This way we have the right people on board while promoting a dynamic, diverse work environment at O2 Telefónica.”
 – Christoph Heckner, Teamlead Recruiting Solutions at Telefonica

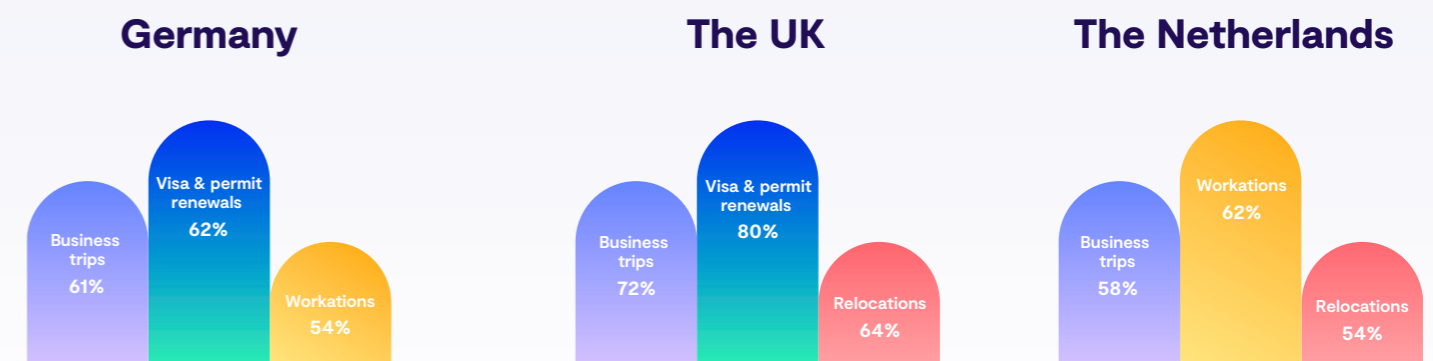
Visa and permit renewals are still a top priority and more than half of respondents (54%) confirmed they relocate talent to existing hubs. These long-term Global Mobility cases have always been on the agenda, but predominantly viewed through the lens of talent acquisition.

Now, it seems like company directives are adding a new layer of complexity: 61% of respondents confirmed their companies now have a hybrid working model, while 12% have a full return-to-office mandate, which are influencing Global Mobility programs on a larger scale.

“For growth-oriented firms, Global Mobility can help ensure a level of internal mobility is available for filling key positions in markets that are ripe for expansion,” comments Donald Jurries, Global Benefits & Mobility Lead at SumUp. “In other cases, I see it supporting a Return-to-Office strategy which will require teams, currently spread out potentially around the globe, to be co-located.”

Meanwhile, with international expansion a high priority, short-term travel cases such as business trips (chosen by 64% of respondents) or international transfers (chosen by 50%) are back on the table.

Figure 6: Country comparison for responses to “Which of the following Global Mobility options does your company offer to employees?”



“It's fair to say that Global Mobility is evolving in both complexity and status,” shared Localize CEO and co-founder Hanna Asmussen while reviewing these findings. “While People teams have to handle a wider variety of cases, that means their Global Mobility work is also growing in terms of impact and influence on the company's trajectory.”

But while addressing bigger strategic goals, People teams are also under pressure to replace fully remote work with a new kind of flexibility — and offering workations seems to be the answer.

57% of respondents shared that their employees had expressed a high demand for workations as a benefit, which also explains why offering them is the third highest priority in Figure 5. Workations seem especially important for teams in the Netherlands, where it came up as their top Global Mobility focus (Figure 6).

Meanwhile, visa renewals are a more pressing priority for teams in Germany and the United Kingdom. Both are influenced by changing immigration policies with Germany's new naturalization law and the UK's handling of post-Brexit work permits and shifting political decisions on visa requirements.

In fact, uncertain geopolitics were cited as the main barrier to achieving Global Mobility goals effectively, followed closely by economic uncertainties (Figure 7). These answers suggest that despite their growth aspirations, companies and their People teams still feel like they're on shaky ground and need to be ready for further changes.

While Global Mobility teams can't directly influence either of these barriers, there were a few more pain points that stood out as more actionable. Despite budgets growing, many still report lacking the appropriate resources and personnel to manage the workload. **The 4th biggest barrier was lacking in-house expertise around immigration, which will be difficult for companies looking to grow quickly into new markets.**

Despite only a quarter of respondents sharing that their budgets had been cut, how they adapt can give us an idea of where compromises start to bubble up when time and money aren't enough. The main changes those teams cited were reducing the scope of their support with so-called "post-visa" details that come up when relocating talent from abroad. For example, nearly half of those whose budgets had been cut shared they no longer support employees with finding housing or moving their belongings during a relocation.

42% also shared that they limit their support to just a specific group of employees, rather than keep Global Mobility an ubiquitous benefit. These challenges can have long-lasting consequences on the company, with more than half reporting that talent choose to move to an employer who offers more mobility support.

The fact is, moving talent across borders is an investment — and where there's an investment, there should be an attractive level of return. Localize explored this topic in 2023, where we found that budgets spent on relocations deliver a near **2X return on their costs** in the short term, and can reach a **near 4X return with relocated employees who stay longer in the company.**

All of which we see again in 2024. An overwhelming majority of respondents confirmed that effective cross-border mobility strengthens key indicators such as innovation, business development and building stronger international partnerships (Figure 8).

Figure 7: What challenges keep you from reaching your Global Mobility goals effectively?



The immigration of skilled workers from abroad to Germany is one of the main factors in addressing the shortage of skilled labor. We urgently need unbureaucratic, transparent, and digital procedures that simplify immigration, as well as a welcoming culture that greets international talent with openness. —**Lydia Erdmann, Senior Legal Counsel, Bitkom**

Global Mobility ROI Gains	
Relocation Cost (mean)	\$26,260
Perceived financial benefit per year (mean)	\$48,660
ROI gain for 1 year	2X
ROI gain for 2 years	4X

Source: The ROI of Global Mobility Report, Localize, 2023

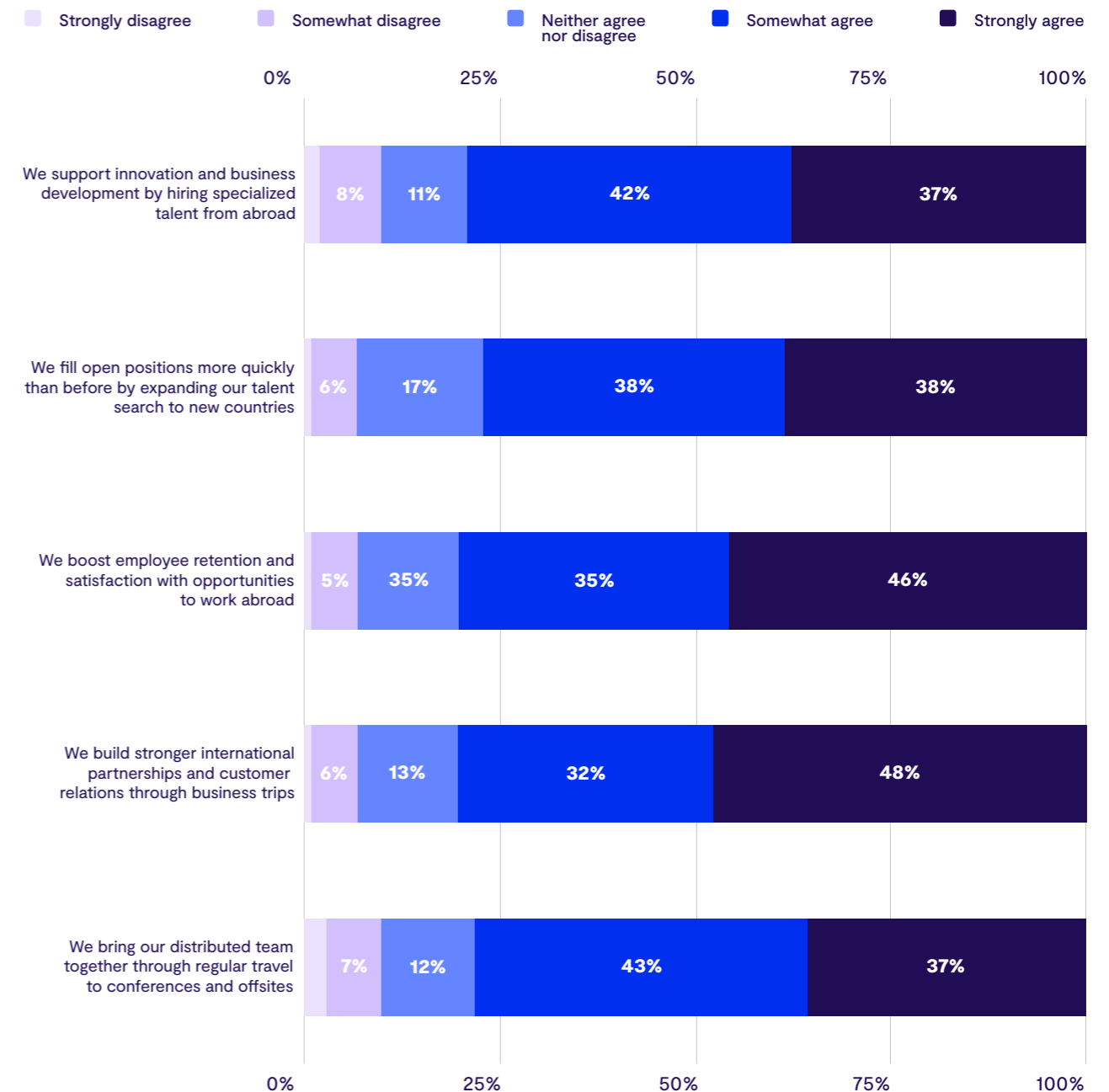
They are also a key contributor to employee satisfaction and retention. And this feedback isn't coming just from the specialists managing the work — 32% of respondents are either the company owners or C-Suite, and for each indicator in Figure 9 more than 90% of them confirmed that they see Global Mobility's positive impact.

These stats confirm that, despite still navigating a lot of uncertainty, **Global Mobility programs are delivering critical value as companies fight for talent, productivity and growth.** But as they bring the fight to an international stage, we have to ask: how will international compliance influence their next steps?



"From a corporate perspective, hiring talent from abroad is not just a nice-to-have anymore. The aging of the workforce in western economies is unlikely to be fully offset by productivity improvement. Most developed economies are experiencing labor shortages and will continue to do so. Meanwhile, talent in emerging economies are more mobile, more open to learning new things, more likely to be familiar with technologies like GenAI, and ready to reskill for roles in demand (based on findings in our recent study of 150,000 workers around the world)." — **Orsolya Kovacs-Ondrejovic, Associate Director, People Strategy at Boston Consulting Group**

Figure 8: How much do you agree or disagree with these sentences about the impact of Global Mobility programs on your business over the past 12 months?



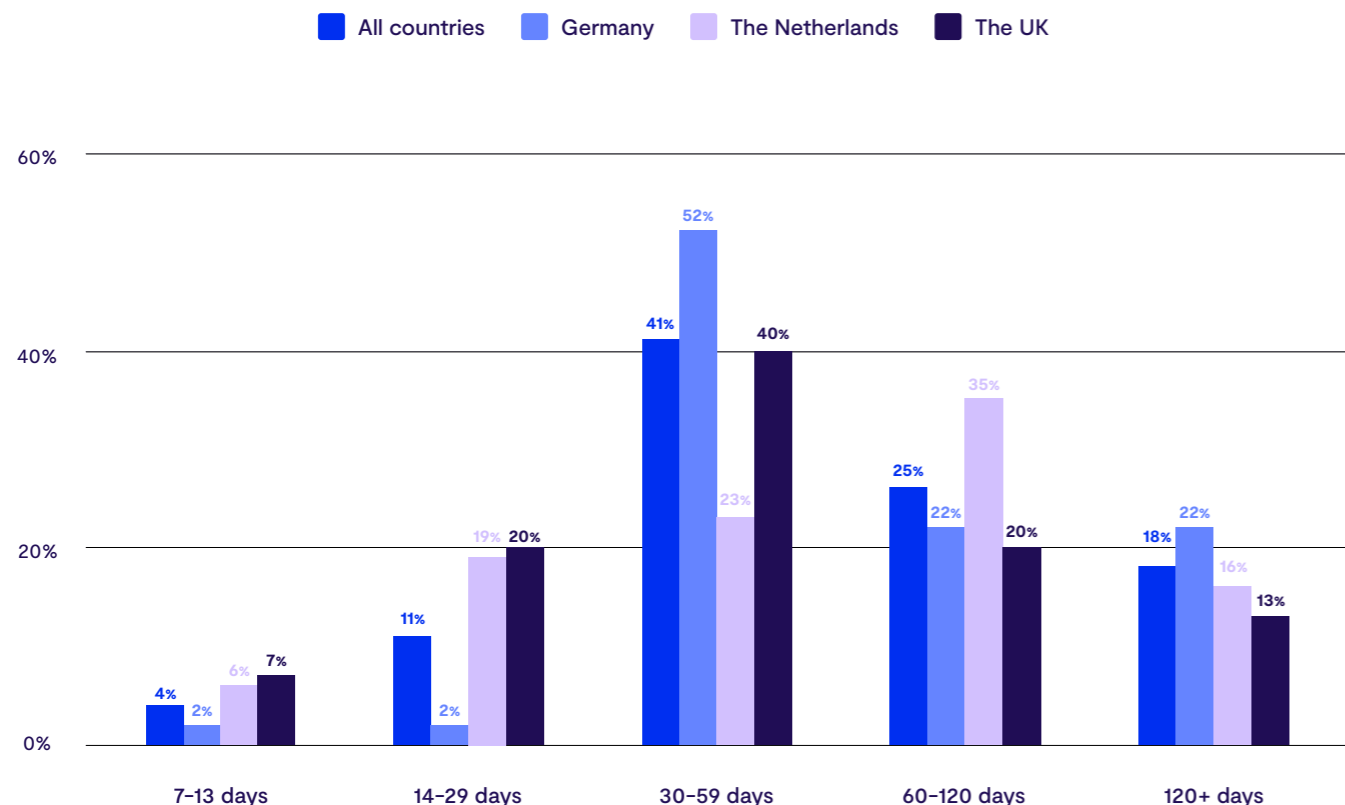
Compliance & work-abroad policies are no longer optional

If 2022 and 2023 were the years of remote working and long-term moves abroad, now things are shifting — long-term relocations are focused on bringing talent to hubs, and “flexible working” now means more short-term work abroad through business trips and workations.

58% of respondents shared that they offer employees the option to temporarily work from a country different from where they normally reside. When asked why, the overwhelming response was that there had been high demand from the employees themselves. Interestingly, 42% also shared that workations are a way to give hybrid workers some remote-working flexibility back.

But workation days aren't limitless. The majority of respondents (41%) said they offer 30–59 days (Figure 9), but policies differ across countries. The vast majority of German companies offer at least 30 days, but tend to concentrate into that 30–59 range.

Figure 9: How many days of workations do you offer per year?



57% share that employees express high demand for the option to workate

Meanwhile, the most popular choice for Dutch companies was the 60–120 range (selected by 35%), while the UK is more evenly distributed with 40% allowing 30–59 days, and 20% allowing 60–120 days and 14–29 days each.

Overall, the vast majority don't go past the 120-day mark, which is mostly due to compliance concerns.

As Donald Jurries, Global Benefits & Mobility Lead at SumUp puts it, “...the risks of tax residency for employees can be high. Social security issues exist, there are potential consequences from Permanent Establishments and so forth.”

“The risks are increasing as country authorities begin to clamp down on workations from a tax perspective. India, for example, has been particularly aggressive.”

As for business trips, they're a priority for 64% of respondents, putting them in second place after visa renewals. These are an important enabler for international expansion, but also carry a level of complexity in sorting out the correct visas for a large variety of destinations, typically at short notice.

Nouran Zarroug, Founder and Managing Director of NuLight Consultancy, puts it best: “As enterprises continue to prioritize expansion into new markets, the urgency to cross borders swiftly and compliantly remains the single most important obstacle.

“As governments begin to fully digitize their immigration infrastructure, further scrutiny is now expected at borders. This in turn puts enormous pressure on Global Mobility & People teams who are required to conduct internal audits, widely communicate these changes, and oversee all the necessary compliance checks of their traveling employees.”

With that in mind, nearly all respondents confirm they have a policy in place to stay on top of their employees' time abroad.

But what is surprising is that 36% said they struggle to enforce it consistently (Figure 10) — this number jumps to 46% of respondents in the Netherlands, despite the fact that 64% of Dutch respondents said they prioritize compliance above everything else.

From the whole pool of responses, 39% have to walk a fine line between meeting compliance obligations and also accepting a moderate level of risk so as to enable bigger business moves (Figure 11).

“Some level of risk will always exist in order for the business to get anything done,” shares Sharon Lion, Director of International Mobility at Einride.

Figure 10: How do you inform your workforce on rules regarding working abroad?



Figure 11: What is your approach to maintaining compliance with international tax and labor law?



“Non-compliance is a no-go — that should always be the starting point. However, things aren't always just black and white, and there might be other considerations that weigh higher. Business rationale for accepting a compliance risk should always be handled on a case-by-case basis, escalated for grandparent approval, as it may very well turn into a greater risk later (financial, reputational, criminal).” – Nicolai Wassmann, Senior Global Mobility Manager at Novo Nordisk

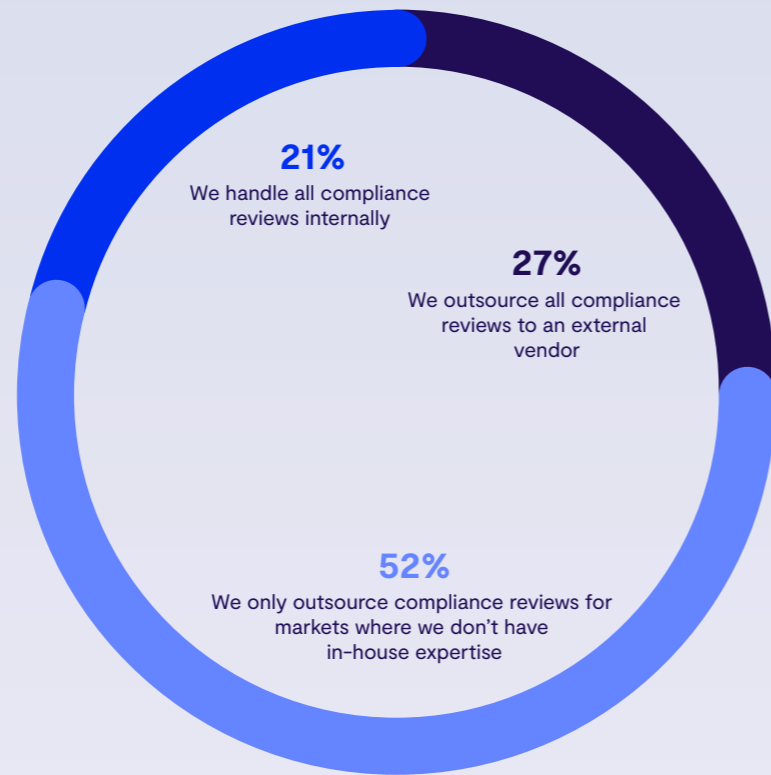
But how can large enterprises stay on top of every compliance review? The answer is, they can't — or at least, not on their own.

The vast majority (77%) lean on external vendors support to review workation and business trip requests — 27% outsource every review, while 52% outsource only for markets where they don't have in-house expertise (Figure 12).

And perhaps for good measure: the risk of non-compliance can be costly, with India fining Netflix €2 million due to non-compliant business trips.

Companies are also increasingly dependent on sophisticated tech, with appetite for support from generative AI tools. 57% said they focus on investing in advanced technology like generative AI for complex tasks, while 25% choose to lean on it only for low-risk repetitive work (Figure 13).

Figure 12: How do you manage compliance reviews for workations and business trips?



The top three areas where respondents want to use this kind of tech are compliance policy reviews (chosen by 37%), defining international expansion strategies (36%), and organizing employee information (35%) (Figure 14).

But when reviewing these results with other Global Mobility leaders, their view on AI is cautious.

Many still think it's too early to tell if Generative AI can help with tasks effectively.

"For me, tech is still a tool that mostly helps with volume," comments Donald Jurries. "Applying for visas is the same process as 35 years ago, but now it's a little easier to handle several people's needs in a digital platform. I just wish that tools could better integrate with one another — perhaps that's the next important step, instead of throwing money at Generative AI."

Pavlina also cautions against a new kind of risk: taking what tech delivers as 100% truthful.

"I agree it's great when creating policies, putting cost estimates together, testing the language for communication based on the audience, creating training (for employees, Talent Acquisition, managers). But you always have to review the responses before releasing them out, because it can be wrong, or misleading simply because your AI assistant tried to please you."

And so it seems like the appetite for more efficient tools is certainly there, but the expertise of People and Global Mobility leaders will continue to play an important role.



"With trained responsible employees and their managers, the tax and social security implications are manageable risks. Risks for the health and safety of employees, and data and IT security are much graver in flexible work and workations. It takes one terrible case of injury, even death, or environmental catastrophe abroad for businesses to feel the implications." - Pavlina Kopečná, Global Mobility Expert

Figure 13: Which option best describes your approach to investing in technology for Global Mobility?

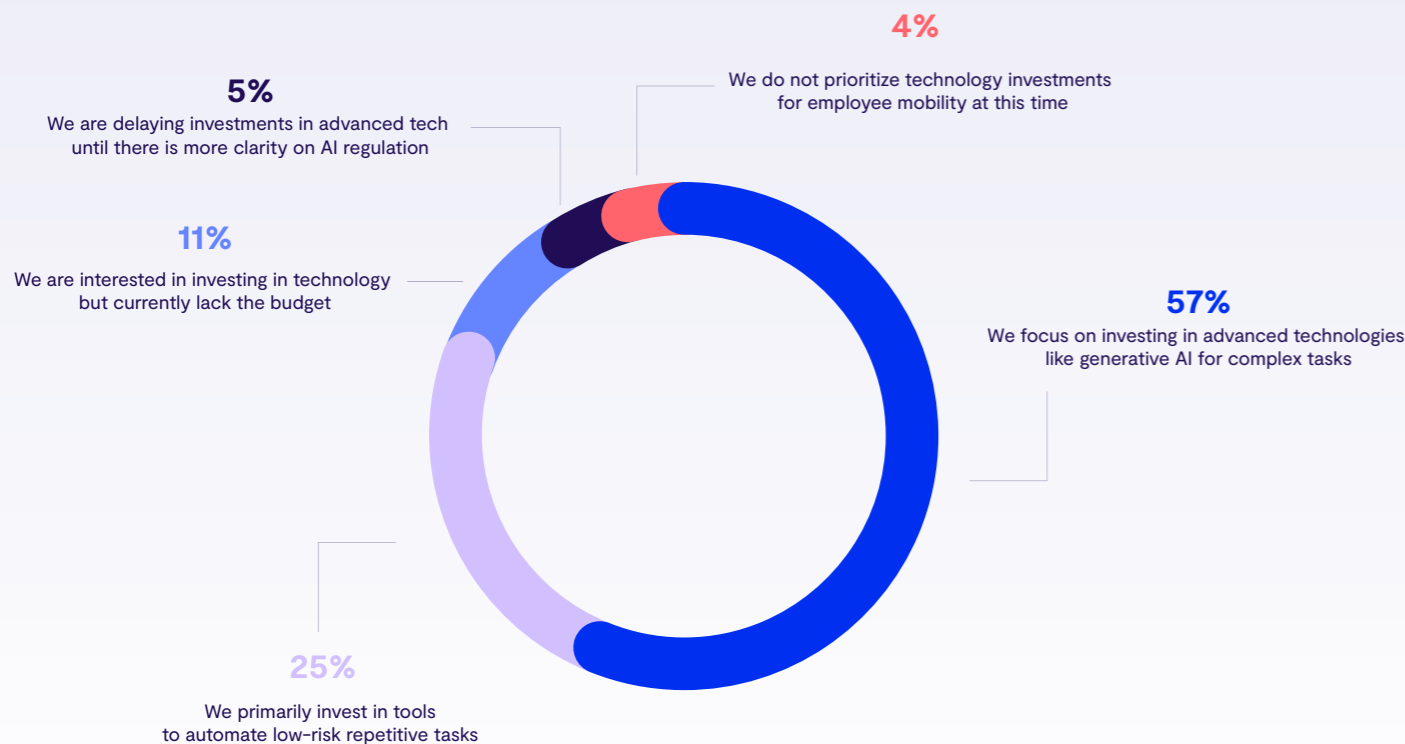
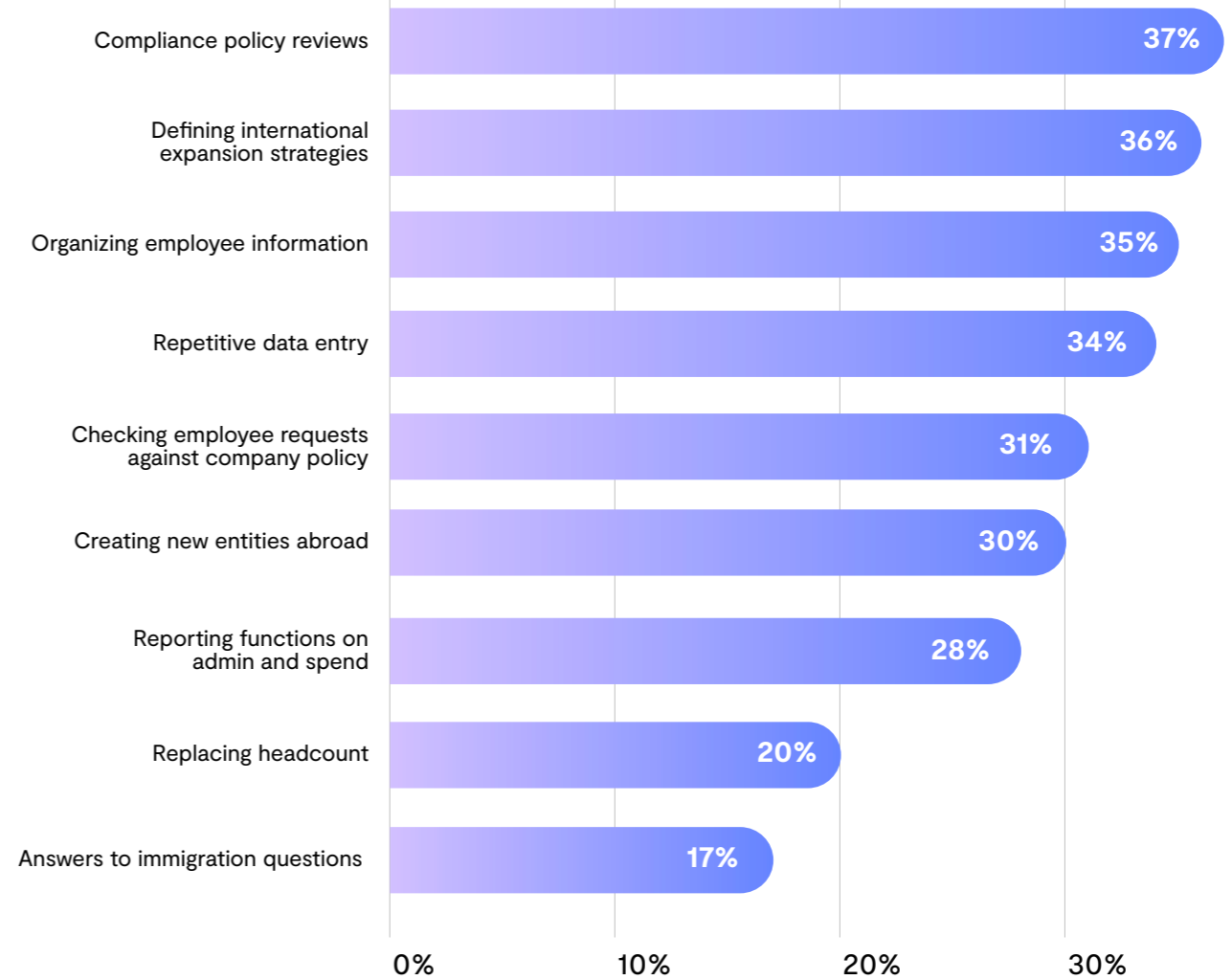


Figure 14: In which areas are you willing to invest in tech to better support your strategy in the next 2-3 years?



Key Takeaways

Takeaway #1: Making moves on a global stage

Budgets and costs are still top of mind, but enterprises are showing more faith in Global Mobility's impact on strategic moves. Investments are starting to show again in specific programs, particularly where high-value talent is involved. Global Mobility as a function will continue to change, becoming more complex, but also more essential to companies' operations as they look to grow their market presence internationally.

Takeaway #2: Closer to the office, but ready to fly out

Enterprises will continue to focus on long-term Global Mobility options such as relocations and visa renewals — an important factor to bringing talent back to in-office work, even if it's hybrid. But they won't stop there — they'll also lean on short-term mobility such as business trips and workations, in one part to establish stronger connections in international markets, but also to balance out returns to office with a new kind of flexibility.

Takeaway #3: There is no one-size-fits-all policy

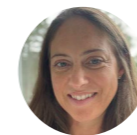
Long-term relocations are no easy feat with immigration rules. However, short-term mobility can further raise the risk of compliance breaches if companies don't stay on top of their talent's movement. Industry leaders are faced with rising scrutiny from governments, without a clear path on how to handle their requirements. As leadership ups the pressure to manage more trips abroad, People teams will be looking for external support and more sophisticated tech to handle the workload.

Methodology & Acknowledgements

The survey was conducted among 200 HR and business professionals and decision-makers based in Germany, the UK and the Netherlands. These companies have programs that allow employees to work from a different, international location than where they currently live, and have at least 500 employees.

Our respondents include business owners and CEOs, directors, vice presidents, C-level executives, and senior managers. These professionals operate in various sectors, with the most represented industries being Software & Technology, Retail, and Financial Services.

Localize would like to thank the following people interviewed, or quoted, for this report.



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About Localyze

We break down borders for companies and their talent

Localyze is the perfect match between intuitive technology and Global Mobility expertise that moves your people to where they need to be.



Operating globally - EMEA, APAC, North America



With over 10,000 relocations worldwide since 2018



Globally compliant and certified platform: ISO 27001, SOC 2

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