

# Mobility

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2023 - 2024



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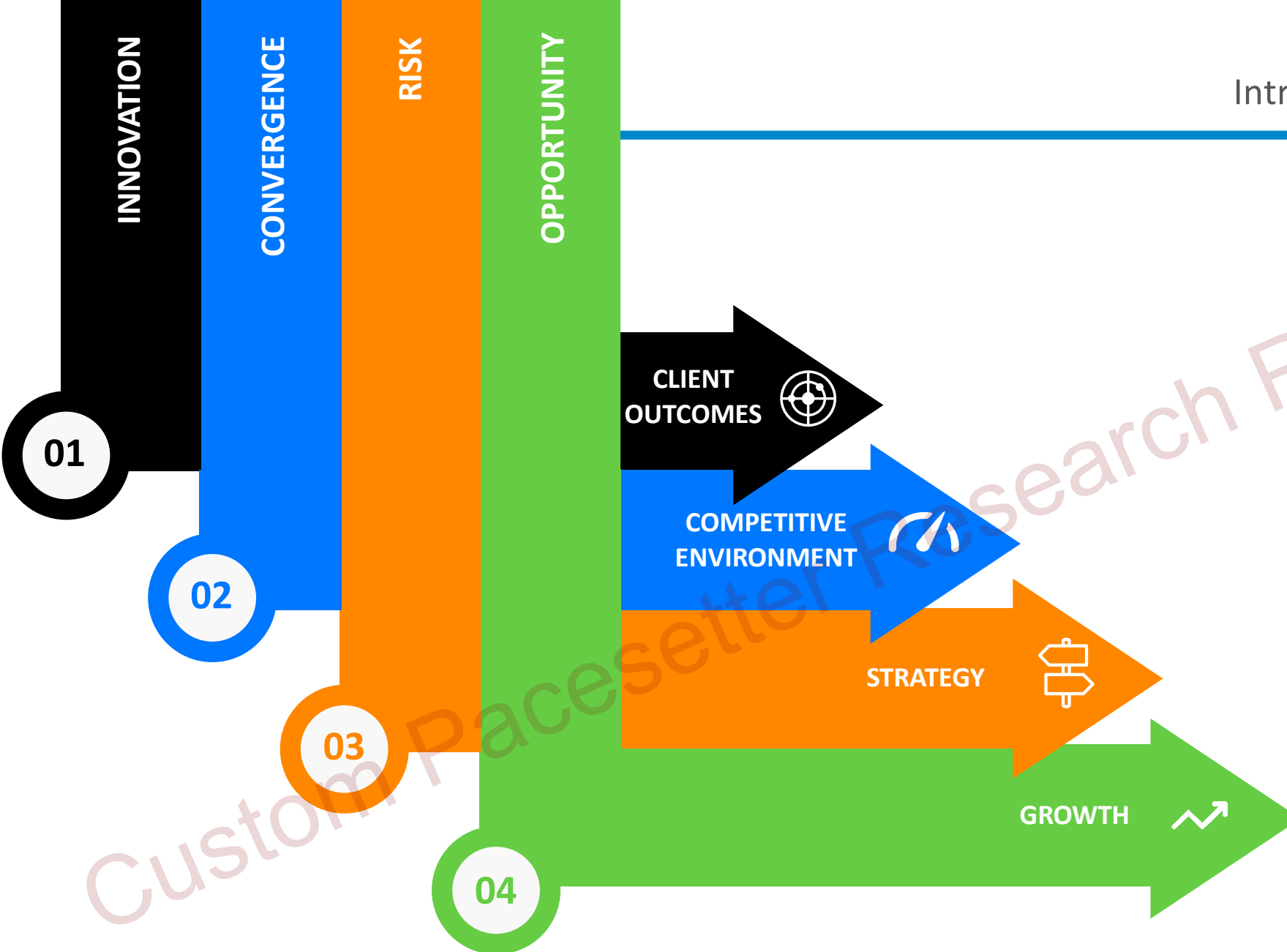
[Law.com: Diversity](#)

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Our readers turn to ALM publications, events, and intelligence to keep at the forefront of their professions.



### What Is Law.com Compass Pacesetter Research About?

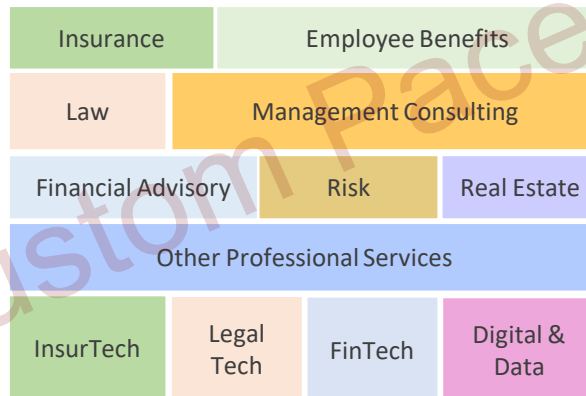
- 1. Innovation:** What professional services providers are doing something different from their peers in a way that moves the needle for their clients?
- 2. Convergence:** How is that innovation changing the competitive landscape?
- 3. Risk:** How does innovation (internal and external) change providers' risk profiles?
- 4. Opportunity:** Is innovation only a threat, or is it also an opportunity?

Law.com Compass Pacesetter Research (previously known as ALM Intelligence Pacesetter Research) is a market research initiative of ALM with an inclusive perspective of the professional services landscape. Rather than traditional market research which focuses on one market segment, APR looks across a broader range that includes law, consulting, insurance, financial advisory, and other actors operating in the market defined by the research topic. We started Pacesetter Research in 2020 to examine how more volatile demand dynamics are forcing market players to reevaluate their approach to **innovation**, **risk**, market **convergence**, and ultimately, **opportunity**. The purpose of Pacesetter Research is twofold:

- Deliver practical insights into the buying and selling of professional services in an increasingly converging marketplace
- Help buyers evaluate their sourcing options with objective assessments of providers' services and capabilities

### Pacesetter Advisory Council (PAC)

Market Leaders are selected by a panel of experts comprised of ALM editors, journalists, market intelligence analysts, and external professionals and academics who have experience working with professional services providers.



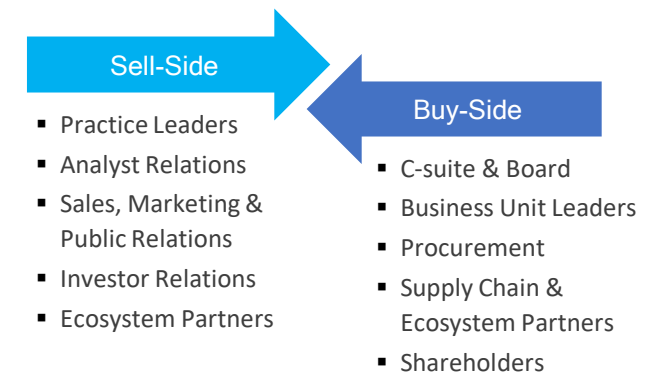
### Research Methodology

APR analysts combine qualitative and quantitative research methods to profile Market Leaders in each market. These providers are evaluated and scored against five core criteria to determine Pacesetter status.

- 1 Business model
- 2 Value proposition
- 3 Service delivery
- 4 Client enablement
- 5 Market Presence

### Audience

APR provides independent and objective analyses to providers and buyers of professional services coupled with practical insights that inform the decision-making process for strategic planning and procurement professionals.



# Market **Overview**



Custom Pacesetter Research Report for LEV

May 2023

Since the 2008 economic crisis, there has been a steady expansion in government regulations that have (intentionally and unintentionally) impeded companies' employee mobility strategies, forcing mobility -- organizations' deployment of their human capital assets -- into a much more board-level strategic sphere. Furthermore, starting in 2017 the US immigration policy significantly tightened, making legal immigration much more difficult to obtain and increasing the denial rate on new H-1B petitions for high-skilled foreign nationals. Also in 2020, with the formal withdrawal of the UK from the EU, Brexit further complicated the movement of employees cross-borders. With this dramatic shift in laws and regulations, organizations were subject to new risks and service delivery strategies suddenly became a high-level priority.

In response to this challenge, professional service providers developed mobility service offerings that focused largely on compliance. These service offerings began to surface following the Brexit vote in the UK, which was seen as the beginning of a roll-back of globalization. Professional service providers, specifically multi-service firms, some consulting firms, and law firms, offer their expertise on immigration, taxes, social security, employment laws, payroll, and employee benefits and compensation issues, to name a few. In addition to this, some professional service providers who offer mobility services have used technology to help their clients become proactive in managing their service delivery needs. Arguably, because both providers and clients have worked through the initial post-Brexit red tape, services centered on mobility have been reduced.

This scaleback has been premature given the Russia-Ukraine War, Russia sanctions, West-China tensions, and other changes on the horizon, mobility is still a global problem. To start, the long-term strategy to deploy people where they are needed (including across borders) is becoming more difficult with rising political populism (e.g., anti-immigration, pro-protectionism, states trying to capture more taxes), shortening supply chains, global economic headwinds, and geopolitical volatility. Moreover, the pandemic also caused many organizations to reevaluate their employee experience as many employees began to re-prioritize mental health, well-being, and flexibility in their work-life balance outlook.

Consequently, this shift in thinking about talent strategy and the role of talent in companies achieving their goals has become a factor for service delivery models that only a few professional service providers have considered in their mobility framework. Talent and skills management are the missing third leg of the stool in mobility, and so far few professional services providers have recognized this. Specifically innovators among multiservice, management consulting, and boutique mobility specialist have begun to develop strategic service delivery models that focus on employee career development opportunities of which is imperative to attract and retain talent.

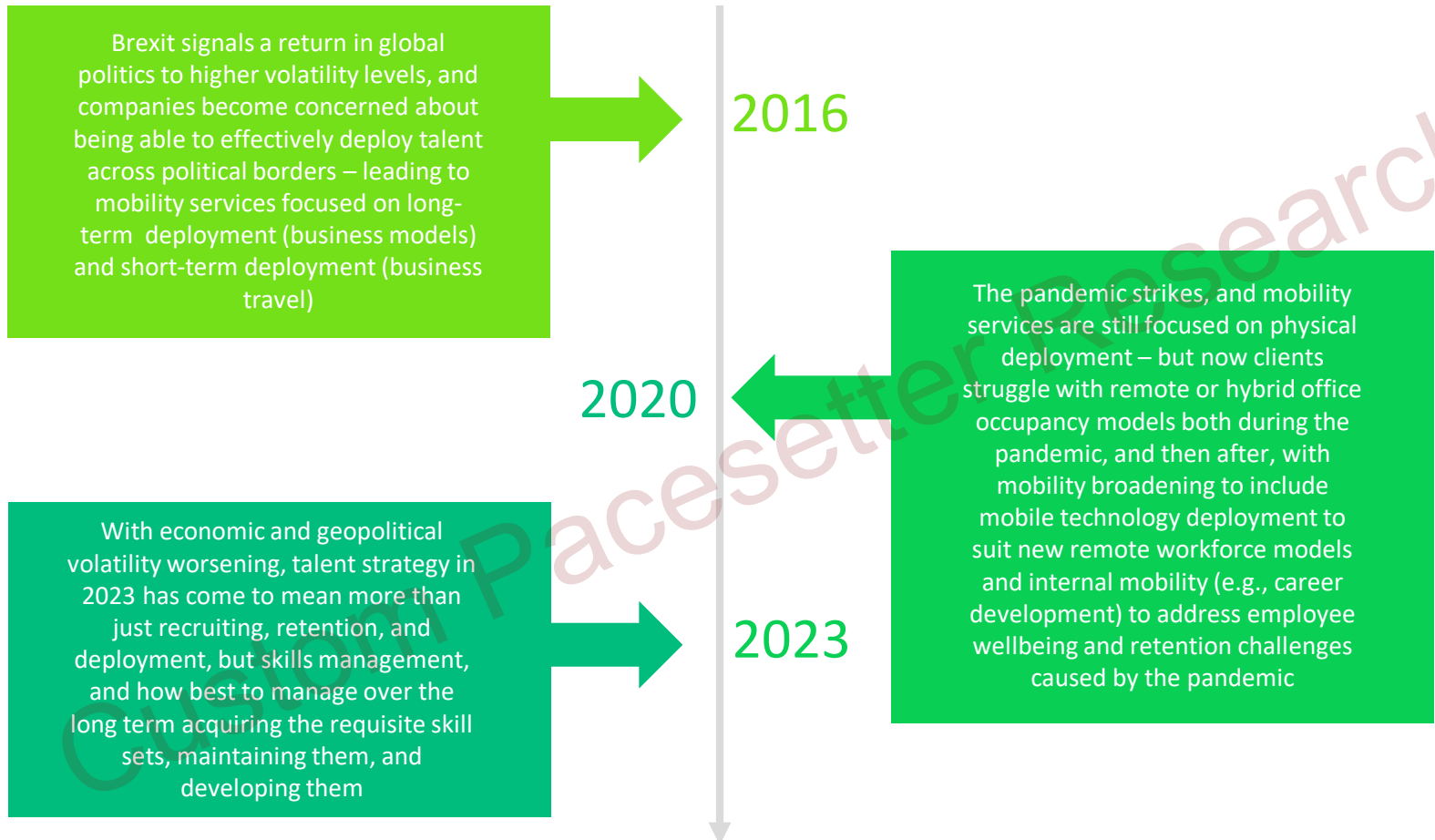
While technology firms have developed mobility platforms to help clients become proactive in managing various mobility needs, many service providers have coupled their advisory services with software platform solutions offered by technology firms -- making technology firms, a single provider, less dominant in this space. Law firms have an immense opportunity in the form extending their services to include a talent management approach supported with regulatory and compliance services, but -- with the exception of some leading innovators -- still focus heavily on legal and compliance issues around mobility, with little/no longer-term strategic offerings.

The *Mobility 2023-2024* report explores how the most innovative professional services providers in 2023 are helping clients understand, develop, and properly manage mobility as part of their service delivery model -- as well as how innovative providers themselves grapple with mobility challenges. While work office occupancy (hybrid/remote) is an essential component to mobility it will be addressed in a separate upcoming Pacesetter report later this year.



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*Employee mobility is ultimately about talent strategy – how an organization mobilizes its talent – but mobility as a service discipline has evolved rapidly over the past decade from an initial focus on the physical deployment of human beings (including real estate strategy, etc.) to creating a long-term skills management strategy*



**Demand Drivers in Mobility in 2023-2024**

The focus has shifted from deploying employees to building and managing mission-critical skill sets for competitive advantage

- Global immigration and employment laws in constant shift are jeopardizing mobility strategy
- Rising economic headwinds and geopolitical volatility are determining factor for an organization’s global footprint
- The scarcity of talent is driving organizations to consider upskilling and reskilling to meet business demands
- Flexibility with remote/hybrid work models, now often an expectation from employees, is impacting service delivery models
- The pandemic caused employees to prioritize their mental health and well-being, leading organizations to reevaluate their employee experience

**Sources of Competitive Advantage**

A proactive approach to mobility requires a talent management strategy

- While compliance is an important element to mobility, talent and skill development are increasingly being recognized as key
- With a focus on skills building and management, value is created in cross-functional teams as opposed to working in silos
- Technology solutions that include an end-to-end platform to manage the mobility process across multiple stakeholders
- A strategic talent management approach creates opportunities for ESG, and more specifically DEI initiatives

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# The Pacesetters



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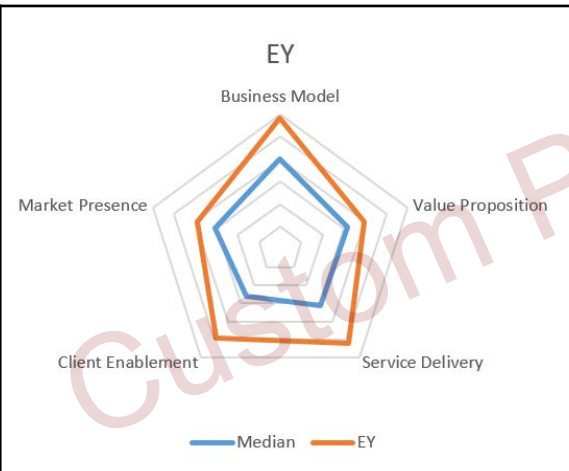
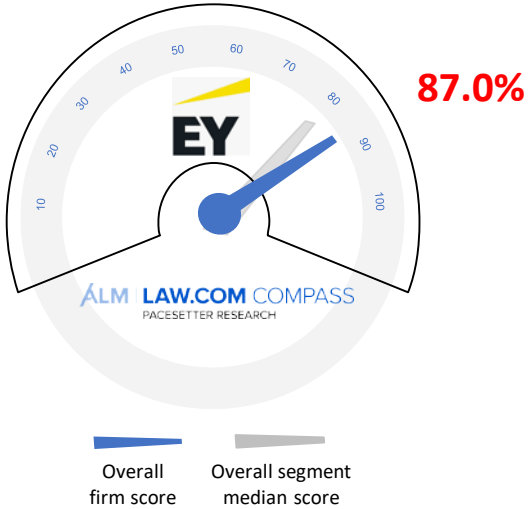
MOBILITY 2023-2024





MOBILITY 2023-2024

Overall Score: Mobility



**“** *EY’s approach to mobility goes beyond providing end-to-end solutions, its framework is centered on placing humans at the center and creating life changing experiences to optimize transformation*

**Profile:**

EY’s People Advisory Services (PAS) practice provides a human-centric approach to business transformation and is integrated with broader EY offerings in Consulting, Strategy & Transactions, Tax, Assurance, M&A and Legal. As a PAS solution, EY Mobility offers holistic compliance and strategic support for the cross-border mobility programs of multinational organizations. Immigration, tax, social security and compensation compliance services are complemented by advisory support focused on mobility performance improvement, mobile workforce enablement and the intersection of cross-border mobility with broader talent initiatives. Connecting Mobility with HR and Talent, EY PAS works with clients to create life-changing experiences for mobility professionals and mobile employees while supporting better outcomes for the business.

The EY Mobility solution is technology-enabled via EY Mobility Pathway (EYMP). EYMP is a scalable, integrated, end-to-end digital solution that simplifies mobile workforce management for organizations. By integrating data from EY, the client, and the client’s third-party mobility support vendors, EYMP connects the client’s mobility ecosystem, provides workflow configuration without the need for IT involvement, streamlines compliance, supports cost-effective execution, improves visibility into program performance and reduces time and effort spent on administrative tasks.

In addition to EYMP deployment, EY Mobility supports life-changing experiences through a range of strategic initiatives designed to eliminate operational silos, improve transparency and empower mobility professionals to excel in their roles. More specifically, EY PAS brings together Mobility and Workforce Advisory professionals in a single global practice, allowing for a holistic perspective on how clients can use mobility to attract, retain and develop key talent while competing more effectively in global markets. EY PAS also helps clients with strategic workforce planning around mobility, including identifying skills gaps, reskilling, upskilling, and leadership development. Furthermore, by proactively sharing thought leadership, best practices and emerging market trends, EY PAS supports the continued education of its clients’ mobility professionals, helping them to build their personal brands while elevating the role of the mobility function as a consultant to the business. EY PAS also continues to play an active role in helping clients to “reimagine mobility,” whether by supporting new operating models (e.g., hybrid/remote, managed services), modernized approaches to mobility policy or the use of workforce analytics to anticipate mobility-related trends relevant to their employee populations.

**Mobility Service Focus**



■ Services offered  
□ Services not offered

# Appendix

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Custom Pacesetter

*The goal of Pacesetter Research is to help buyers of professional services navigate an increasingly complex landscape with confidence. We use a multidisciplinary perspective to identify best-in-class providers of legal, consulting, financial, insurance, employee benefits, and other professional services, and analyze how they are evolving as an ecosystem of interdisciplinary service providers. Our research is grounded in over 50 years of accumulated market insights and qualitative research models that combine knowledge of management science with case studies and other sources of knowledge to understand patterns of market supply, demand, behavior, and ways of doing business.*

## IDENTIFY

- The Pacesetter Advisory Council (PAC) convenes in advance of the research project kick-off; members include ALM journalists and editors, and external experts such as consultants, general counsel, and industry thought leaders
- The PAC selects the set of Market Leaders that will be covered in the research topic from a larger group of providers that members have identified in the normal course of their work
- PAC members also provide expert knowledge and insights to the Pacesetter Research team throughout the research and analysis process

## RESEARCH

- The Pacesetter Research Team within ALM conducts primary and secondary research
- Primary research includes in-depth interviews with practice leaders at the provider firms covered in the research; satisfaction interviews with clients referred by those providers; and in-depth interviews with thought leaders, recruiting professionals, and other sources
- Secondary research includes data gathered from annual reports and earnings calls, management presentations, public filings, case studies, press releases, journals and publications, online information databases and other publicly available resources

## ANALYZE

- Law.com Compass Pacesetter Research analysts evaluate and score the Market Leaders against five core criteria
  1. Business model
  2. Value proposition
  3. Service delivery
  4. Client enablement
  5. Market presence

*See criteria definitions on next page*
- Market Leaders that achieve a Pacesetter Impact Score equal to or over 85 are designated as Pacesetters
- Pacesetter analysts map markets and stakeholders and write market trends
- Market segment overviews are peer reviewed by the appropriate PAC member

## About ALM

ALM is the most trusted media, information and intelligence company supporting both the practice of and business of professionals in the legal, insurance, commercial real estate and financial services industries. ALM delivers leading data, intelligence, insights, events and audiences essential for growing businesses globally to over 7 million professionals. Please visit [www.alm.com](http://www.alm.com) for more information, and visit [www.alm.com/events/](http://www.alm.com/events/) to learn about our upcoming events. Please follow us on Twitter at [@ALMGlobal\\_](https://twitter.com/ALMGlobal_).

**30+**  
Publications

**65+**  
Events hosted  
globally

**250+**  
Intelligence reports  
developed

**2.65M**  
website visitors per  
month

**2.85M**  
Newsletter  
subscribers

**1.08M**  
Mobile visitors per  
month

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