BOUNDLESS

2026
ANNUAL
REPORT

The State of Global Mobility Programs

Insights from a survey of 500 HR decision makers

Executive Summary

Global mobility is *no longer* a back-office function

As companies compete for specialized talent across borders, immigration and relocation programs are becoming core infrastructure for workforce planning, directly affecting how fast organizations hire, how reliably they fill critical roles, and how long employees stay.

Yet the programs meant to support this ambition are, in many cases, structurally unprepared for it.

Boundless surveyed 500 HR decision makers responsible for global mobility across the United States, United Kingdom, Germany, and the Netherlands. The research reveals a consistent and consequential pattern: most organizations are managing mobility through fragmented vendor ecosystems, and that fragmentation is emerging as a growth constraint.

More than half of organizations (54%) rely on multiple providers to coordinate immigration and mobility services. Nearly half of all mobility work (49%) sits with generalist HR teams rather than dedicated mobility functions. And the three challenges HR leaders most frequently mention — budget pressure (24%), cost unpredictability (22%), and limited internal resources (19%) — are symptoms of the same structural problem: mobility programs built for occasional international hiring now being asked to support hiring at scale.

At the same time, the data reveals a market in genuine transition. Organizations are prioritizing integration, automation, and AI at historic rates. Employers cite immigration as a deciding factor in winning and retaining candidates an average of 10 times per year.

And the measures that matter most, such as fill rates, time-to-start, and long-term retention, show meaningful returns for organizations that invest in mobility infrastructure.

Five findings define the state of global mobility in 2026

The findings in this report are drawn from organizations across four markets, spanning company sizes from 250 to 5,000+ employees. Together, they offer a detailed picture of where global mobility programs stand today, and what separating the leaders from the laggards actually looks like.

01 **Fragmentation is the norm, not the exception**

Fifty-four percent of organizations use multiple providers. The coordination burden this creates falls almost entirely on HR teams that are already stretched.

02 **The maturity gap is widening**

Some organizations have built integrated, scalable mobility programs. Many more believe they have. The gap between perceived maturity and actual operational readiness is significant and growing.

03 **Cost unpredictability is a strategic risk**

Difficulty forecasting immigration costs and timelines is mentioned by 22% of respondents as a top barrier to scaling. Without predictability, global hiring strategies are built on unstable ground.

04 **The market knows what it wants**

Eighty-two percent of employers rate HRIS integration as essential. Similarly, 82% say the same of workflow automation. The capability priorities are clear but the challenge is execution.

05 **Immigration is becoming a core lever in talent strategy**

Organizations that can move skilled workers efficiently across borders and time zones, and without administrative delays, are pulling ahead in the competition for specialized talent.

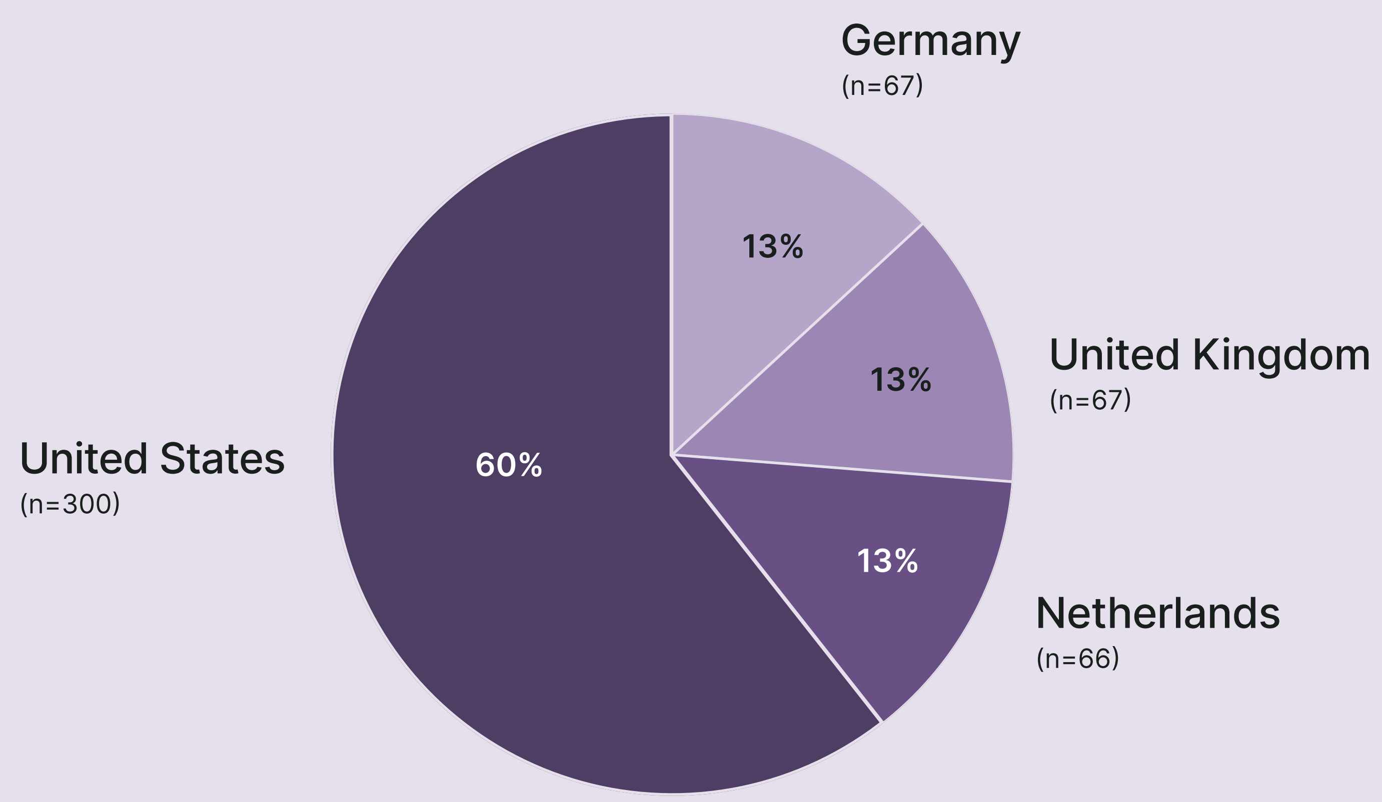
About This Research

This report is based on a survey of 500 HR decision makers responsible for global mobility programs.

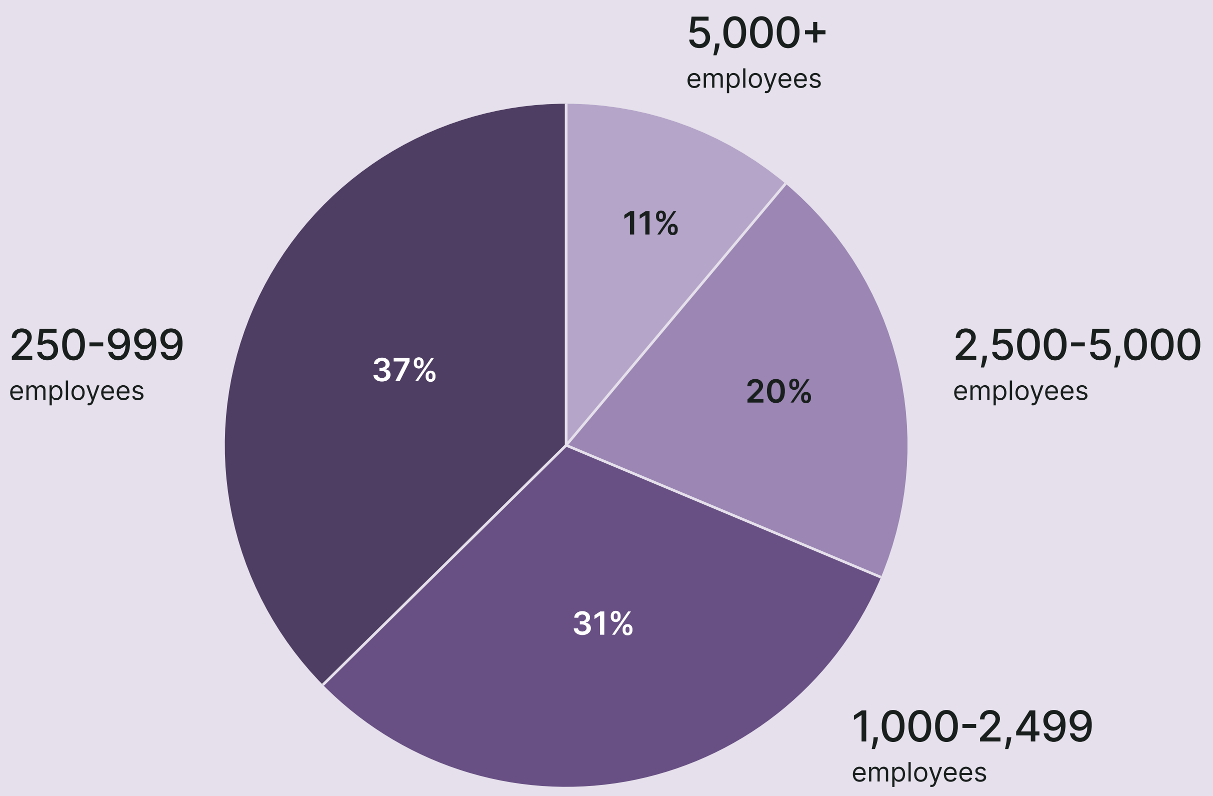
The research was conducted by Sapio Research on behalf of Boundless in February 2026. All respondents held decision-making responsibility for global mobility, immigration, or international hiring programs within their organizations. Fifty-nine percent identified as the primary decision maker and 32% as one of several decision makers.

Results are subject to sampling variation of ±4.4 percentage points at the 95% confidence level.

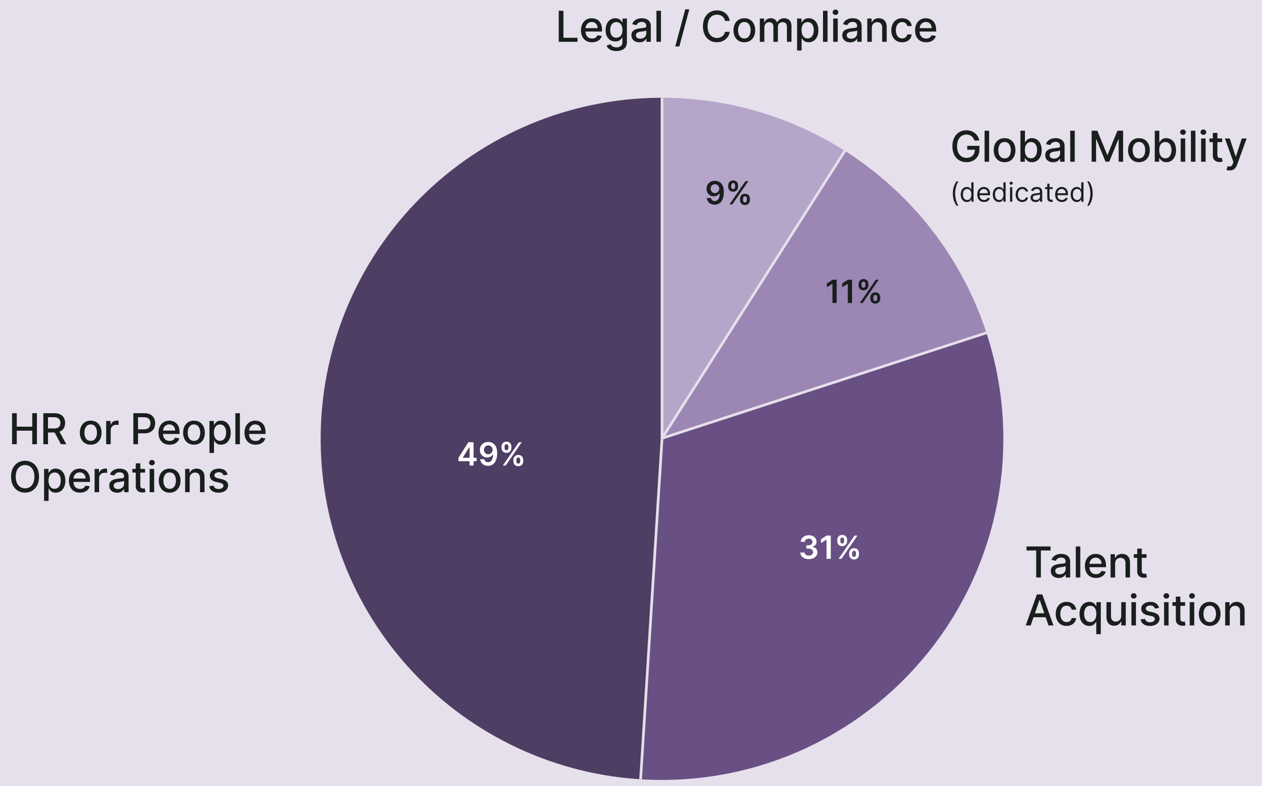
Respondent distribution



Company size



Functional role



Seniority

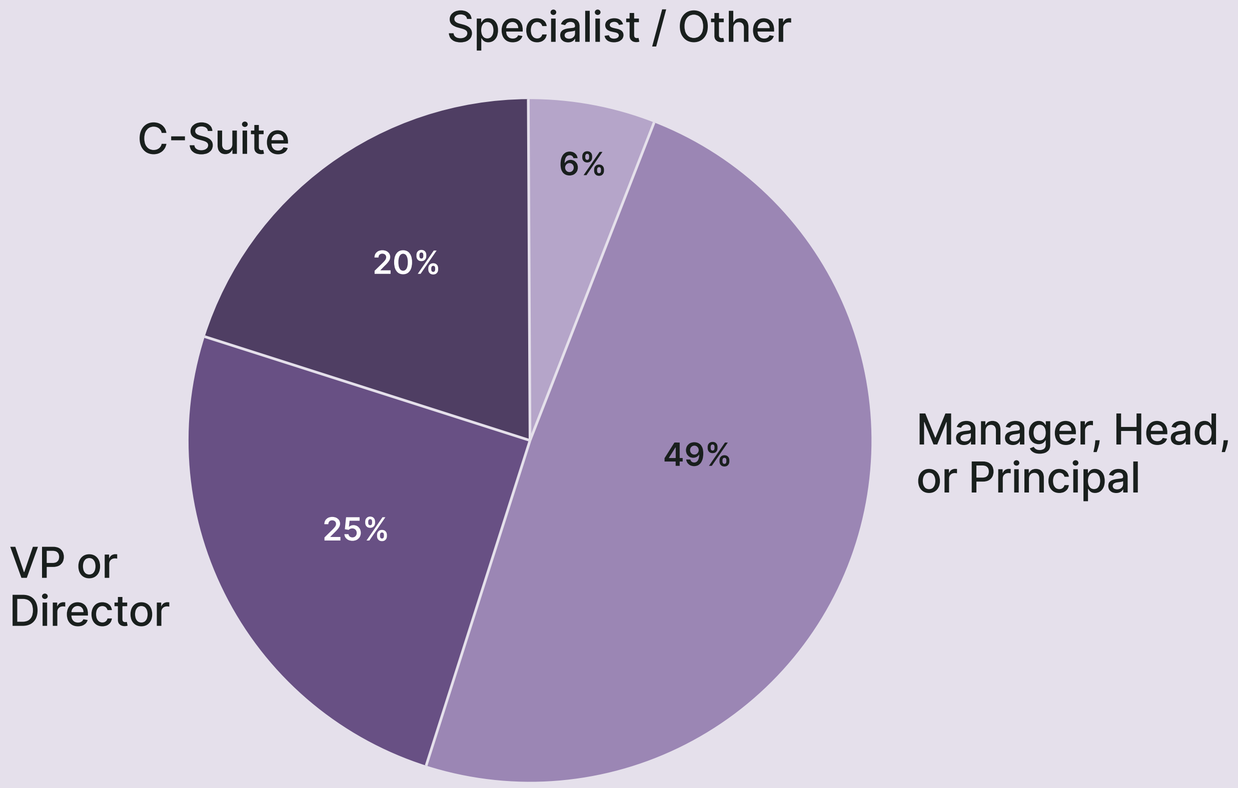


Table *of* Contents

Chapter 1

More than half of organizations are managing mobility across multiple vendors, and paying the price

The Fragmented Majority

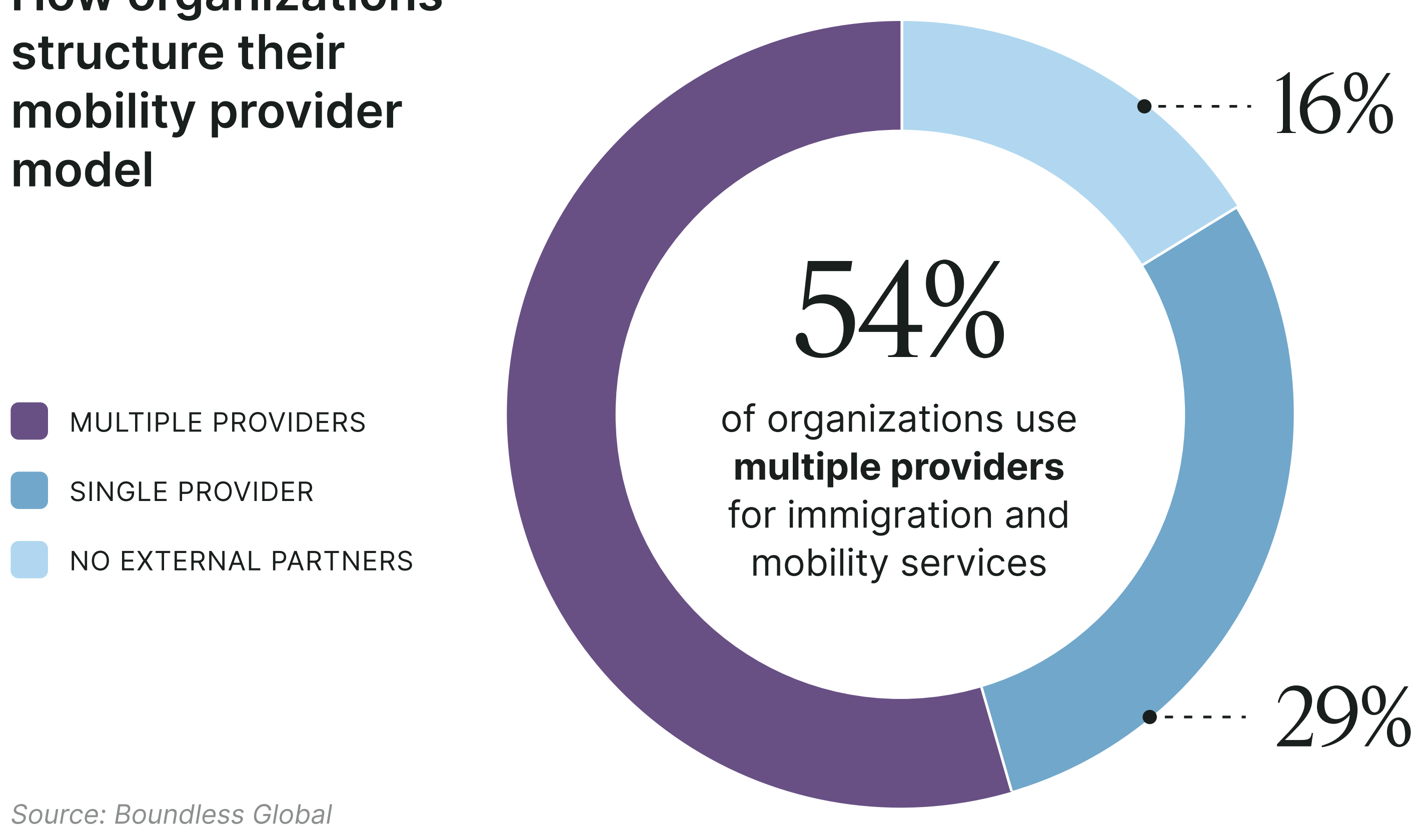
Fifty-four percent of organizations rely on multiple providers to manage their immigration and mobility programs.

That number, on its own, is not necessarily alarming. Multi-vendor models exist for legitimate reasons. Immigration law is jurisdiction-specific, and relocation logistics vary by country and often even by region. Payroll compliance across borders requires specialized expertise. Organizations often reach for the best available vendor in each category, and over time, those individual decisions compound into a complex ecosystem of providers.

Managing those providers can become increasingly difficult as mobility programs grow. When immigration law firms, relocation vendors, payroll partners, and internal HR teams each operate in separate systems, the work of connecting them falls to HR. Case tracking happens manually, communication across providers requires active management, and visibility into program performance becomes fragmented.

For HR leaders already managing broad workforce responsibilities, this coordination overhead can make global hiring slower, more resource-intensive, and harder to scale.

How organizations structure their mobility provider model



Source: Boundless Global Mobility Survey, 2026

Who Owns Mobility, and What That Means

11% of organizations have a dedicated global mobility function

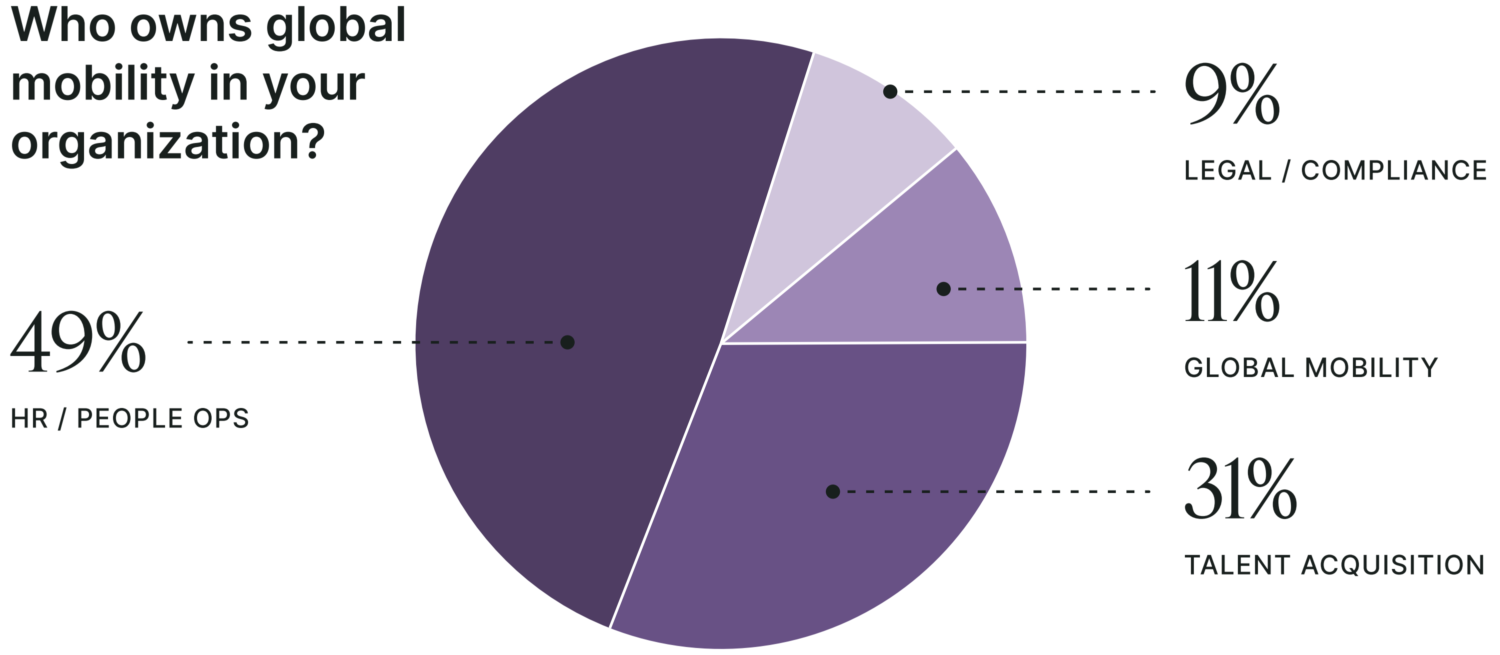
5x as many manage it with general HR

Only 11% of respondents work in dedicated global mobility roles. Nearly half (49%) manage mobility as part of a broader HR or people operations function, and another 31% sit within talent acquisition or workforce planning.

This ownership structure reflects how mobility programs evolved at most organizations: incrementally, as international hiring became more common, with responsibilities absorbed into existing roles rather than built as a distinct capability. The result is that programs of real strategic importance are often managed by teams for whom mobility is one priority among many.

HR generalists managing mobility alongside recruiting, onboarding, compensation, and compliance have less bandwidth to optimize processes, evaluate provider performance, or anticipate issues before they become delays. This may help explain why 19% of respondents report limited internal resources as their top challenge.

Who owns global mobility in your organization?



Global Mobility Is No Longer Limited to Large Enterprises

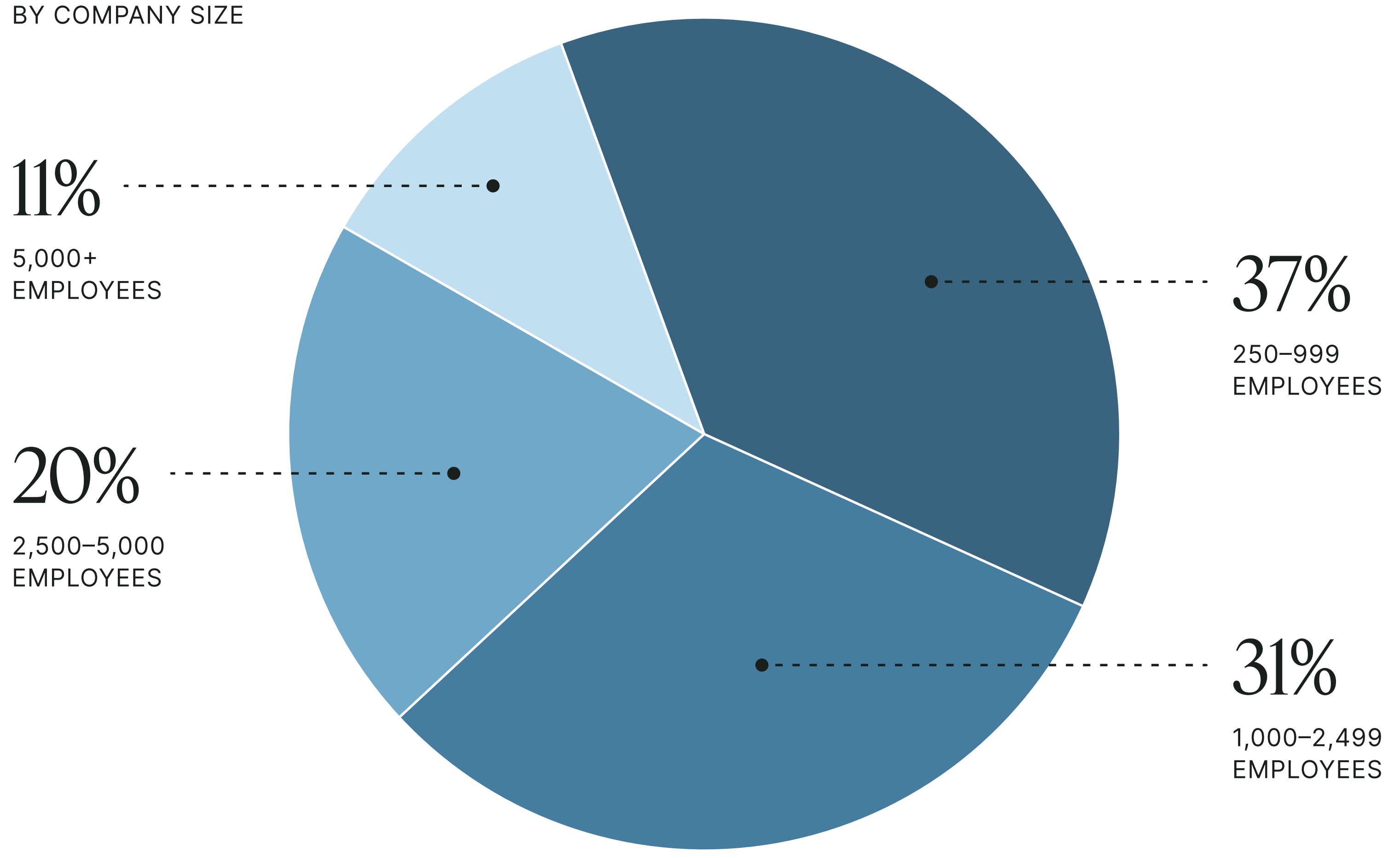
Global mobility has traditionally been associated with large multinational corporations. This research shows that organizations of many different sizes are managing international hiring programs.

More than two-thirds of respondents (68%) work at organizations with fewer than 2,500 employees, while 37% come from companies with between 250 and 999 employees. As a result, the findings in this report provide insight into how mid-market employers are approaching global mobility.

For many of these organizations, managing immigration is one responsibility among many. Coordinating multiple providers can add to the workload of HR teams that are already responsible for recruiting, onboarding, compliance, and other people operations.

Global mobility is no longer a challenge limited to large enterprises

DISTRIBUTION OF RESPONDENTS BY COMPANY SIZE



Regional Variation: A Market That Is Not Moving in Unison

The survey reveals meaningful differences across markets, with each country facing its own set of mobility challenges.

United Kingdom

The United Kingdom shows the highest rate of organizations facing cost unpredictability (33%, versus 21% in the US and 22% in Germany), likely reflecting the complexity of post-Brexit immigration rules and the operational challenges of managing both UK and EU mobility programs simultaneously. UK respondents also show notably higher demand for automation (51% rate it “must-have,” compared to 37% in the US and 24% in Germany), suggesting that HR teams in the UK are spending more time coordinating immigration processes across systems and providers.

Germany

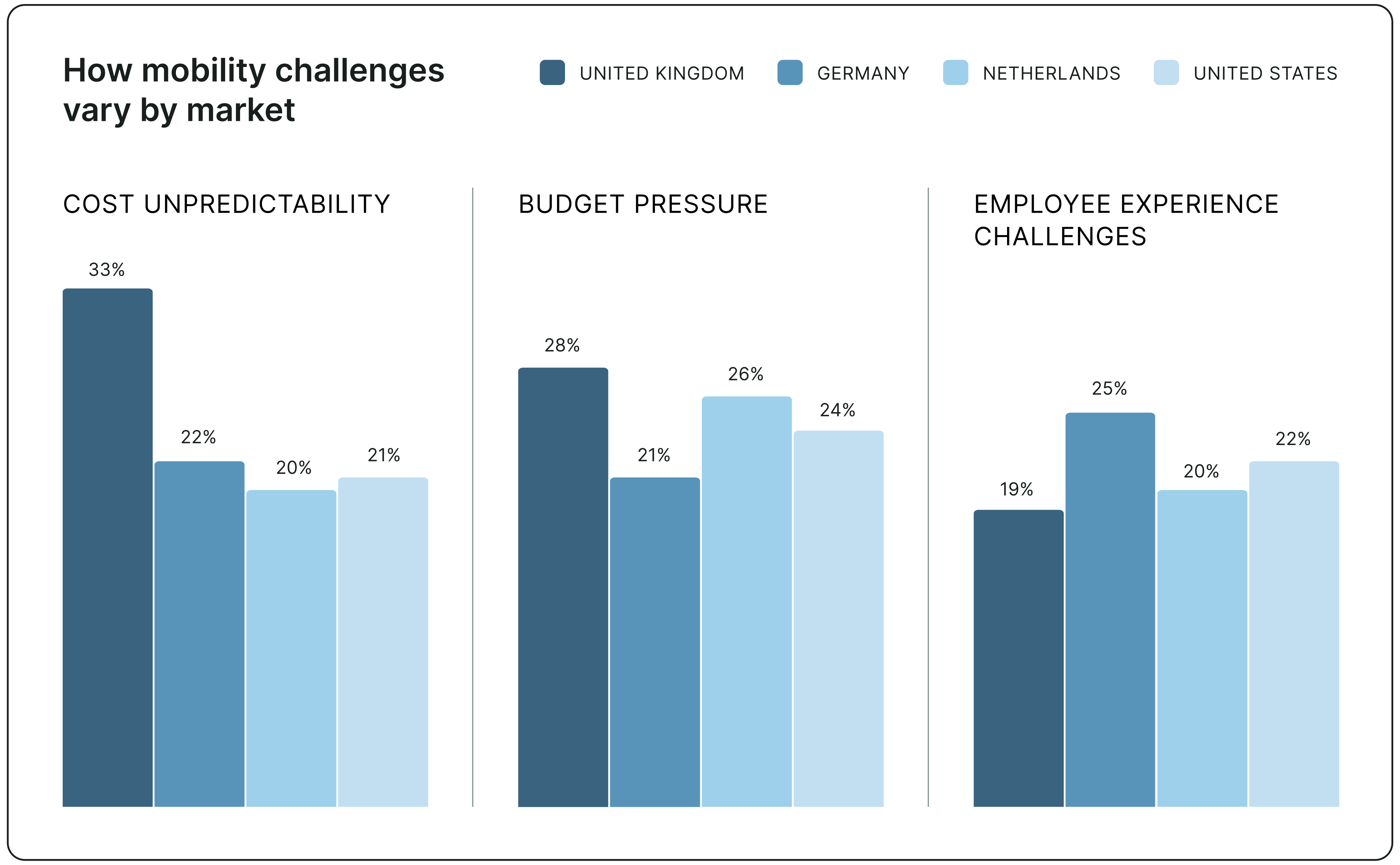
Germany presents a distinct profile. German respondents are markedly less likely to rate AI-driven capabilities as essential: Nineteen percent say AI tools are “not at all important,” compared to just 3% of US respondents. They also show stronger concern about employee experience and communication (25% cite it as a top challenge, the highest of any market). These patterns suggest a market that is more skeptical of emerging technology and more focused on the human experience of immigration, a combination that has implications for how mobility solutions should be positioned and implemented in the German market.

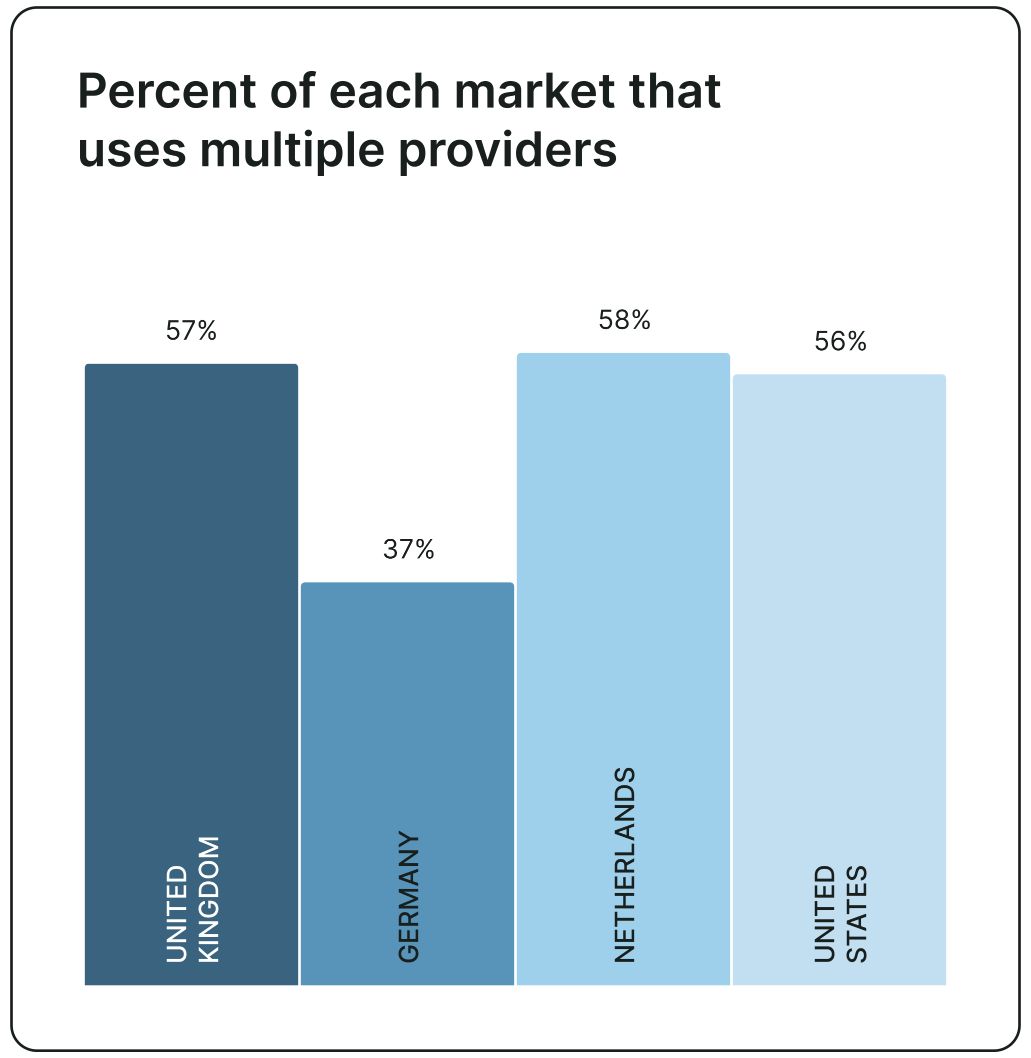
The Netherlands

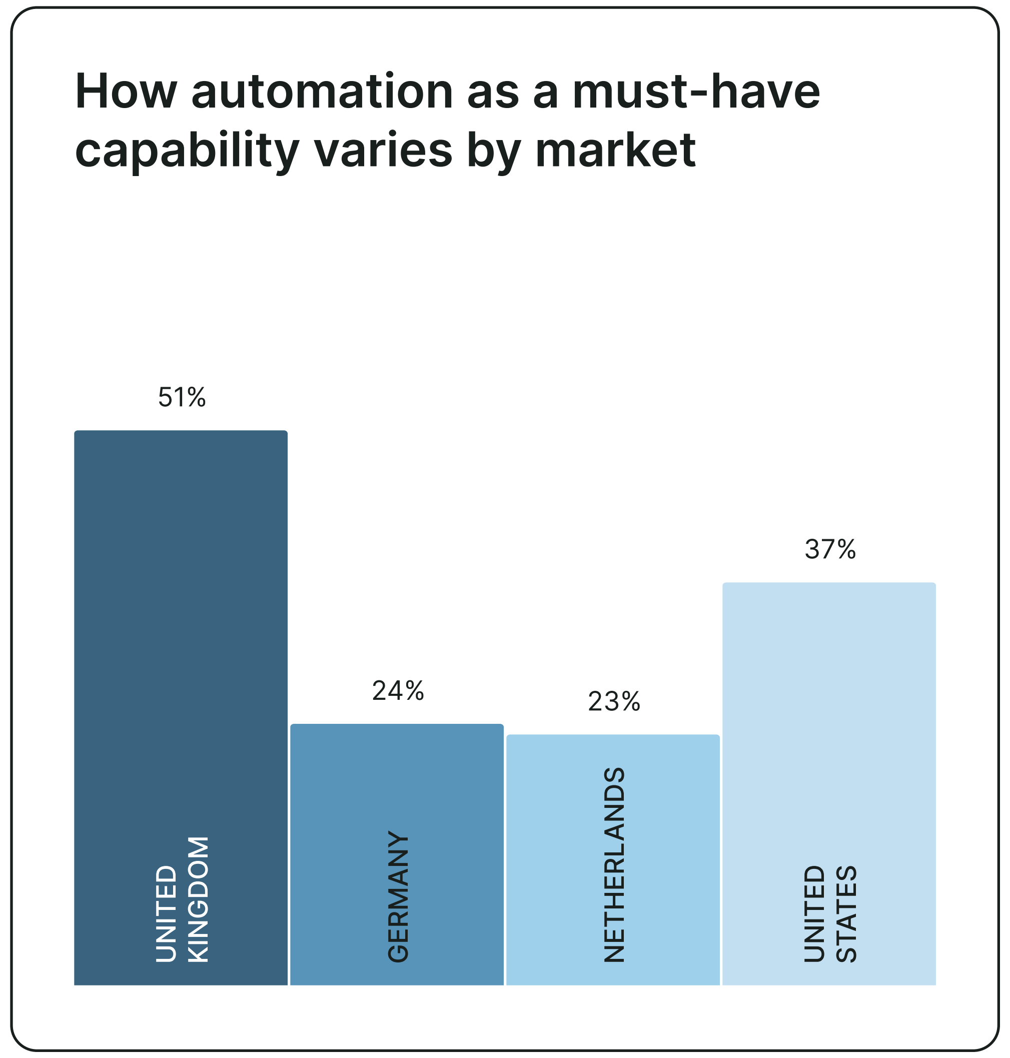
The Netherlands, despite its relatively small sample, shows a striking pattern: Fifty-five percent of Dutch respondents say their mobility programs are only partially in place for key capabilities, the highest rate among the four markets. Dutch organizations also show the highest rate of multi-provider dependency (58%) and the highest proportion of respondents who mention limited internal resources. This suggests that many organizations in the Netherlands are trying to expand global hiring without the systems and resources needed to support it.

The United States

US respondents, by contrast, show relatively high confidence in their programs, with higher rates of full integration and stronger scores on fill rates and time-to-start. But even among US organizations, 54% still use multiple providers and 24% cite budget pressure as their primary challenge, a reminder that even the most mature market has not fully solved the challenges of managing global mobility at scale.







Chapter 2

Why structured programs still struggle, and what “integrated” actually means

The Maturity Gap

One of the more striking findings in this research is the gap between how organizations view their mobility programs and the challenges they continue to face.

Many HR leaders describe their mobility programs as reasonably mature: they have vendor relationships, documented processes, and established workflows. And yet, those same organizations continue to report the operational challenges associated with much earlier stages of program development, namely unpredictable costs, fragmented visibility, manual coordination, and limited internal capacity.

Boundless has identified four stages of mobility program maturity based on survey patterns and common industry practices. Understanding where an organization sits on this spectrum is the first step toward understanding why the challenges feel persistent even when processes appear established.

MOST MATURE

4	Integrated	Able to scale Automation and centralized reporting	
3	Structured	Formal policies Siloed systems	WHERE MOST ORGANIZATIONS THINK THEY ARE
2	Developing	Multiple providers Disconnected systems	WHERE MOST ACTUALLY ARE
1	Ad Hoc	Minimal policies and little documentation No systematic tracking	

LEAST MATURE

The *Four Stages* of Global Mobility

STAGE 1

Ad Hoc

Immigration is managed on a case-by-case basis, typically through external legal counsel. There are minimal policies, little documentation, and no systematic tracking of program performance. This approach works for organizations with infrequent international hiring but becomes unsustainable as volume grows.

STAGE 2

Developing

Early mobility policies begin to emerge. Organizations start tracking cases more systematically and may introduce dedicated vendor relationships. But the underlying structure remains fragmented — multiple providers, disconnected systems, and heavy reliance on manual coordination. Most organizations believe they have moved past this stage, but survey data suggests many have not.

STAGE 3

Structured

Formal mobility policies exist. There is centralized oversight of cases, more consistent compliance processes, and clearer vendor accountability. Programs at this stage have meaningfully reduced operational friction compared to earlier stages, but systems often remain siloed from core HR technology, and program visibility is still limited.

STAGE 4

Integrated

Immigration workflows are connected with HRIS platforms, workforce planning tools, and employee communication systems. Automation handles routine case tasks, reporting is centralized, and employee experience is consistent across regions. Organizations at this stage can scale mobility programs without significantly increasing administrative overhead.

The Maturity Illusion

The survey suggests that many organizations have established mobility programs but still face challenges that make international hiring difficult to manage. Having documented policies, external providers, and defined processes is an important step. But those elements alone do not necessarily provide the visibility organizations need to forecast costs, track progress, or plan future hiring.

One example is the difficulty many respondents reported in predicting immigration costs and timelines. Reliable forecasting depends on having access to consistent data, including past case information, typical processing times, and current case status. When that information is spread across multiple providers and systems, it becomes more difficult to build an accurate picture of the program.

The survey also highlights the importance organizations place on integration. Eighteen percent of respondents identified HRIS integration as their biggest challenge, while 82% rated HRIS integration as a must-have or very important capability when evaluating mobility providers. Together, these findings suggest that many organizations see closer integration between immigration and HR systems as an important step toward improving visibility and managing mobility programs more effectively.

18%

mention *lack of HRIS integration* as a top barrier to scaling

Chapter 3

Why mobility programs become harder to manage as they grow

The Real Cost of Fragmentation

When asked to name their biggest challenges in scaling or modernizing their mobility programs, respondents most frequently identified budget pressure (24%), difficulty predicting immigration costs or outcomes (22%), and limited internal resources (19%).

Biggest challenges in scaling or modernizing global mobility programs (top 2 selected)

The top three all point to the challenges of managing mobility across multiple providers and systems.

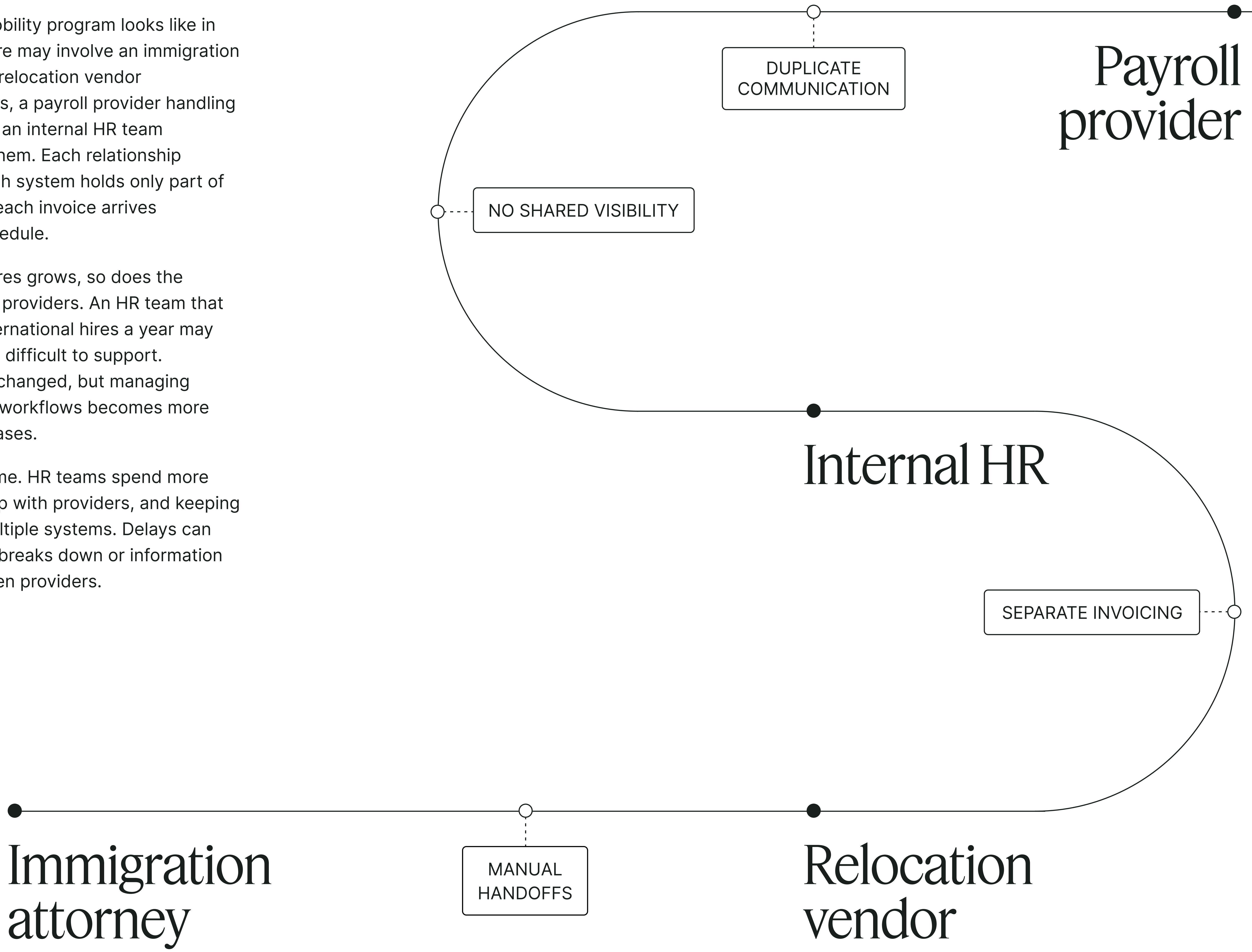
These challenges are often treated as separate problems requiring separate solutions, such as negotiating vendor contracts, improving forecasting, and hiring more staff. However, many organizations may be experiencing them for the same reason: mobility programs that rely on multiple providers, systems, and manual processes.

Consider what a multi-vendor mobility program looks like in practice. A single international hire may involve an immigration attorney managing visa filings, a relocation vendor coordinating housing and logistics, a payroll provider handling cross-border compensation, and an internal HR team coordinating the work between them. Each relationship requires active management, each system holds only part of the employee's information, and each invoice arrives separately and on a different schedule.

As the number of international hires grows, so does the work involved in managing those providers. An HR team that can comfortably manage five international hires a year may struggle with ten and find twenty difficult to support. The hiring process itself has not changed, but managing multiple providers, systems, and workflows becomes more time-consuming as volume increases.

This added coordination takes time. HR teams spend more hours tracking cases, following up with providers, and keeping information up to date across multiple systems. Delays can also occur when communication breaks down or information is not shared consistently between providers.

Every additional provider means *more coordination* for HR.



The Multi-Provider Tax

The Cost of Uncertainty

The 22% of respondents who identified cost unpredictability as their top challenge are describing a problem with consequences that extend well beyond the finance team.

When HR leaders cannot reliably forecast what an international hire will cost, in fees, in processing time, and in administrative effort, they cannot confidently include global hiring in talent strategy discussions. International roles get deprioritized in favor of domestic candidates whose costs and timelines are known. Mobility programs get treated as exceptions rather than strategic tools.

The data on immigration as a talent strategy (explored in Chapter 5) suggests that organizations with more predictable mobility programs may have an advantage when competing for specialized talent.

What Fragmentation Costs at Different Company Sizes

The impact of fragmentation is not uniform across company sizes, and the data reflects this.

Smaller organizations (250–999 employees) report the highest rates of limited internal resource challenges (**19%**) and are most likely to be using multiple providers relative to their operational capacity. For these organizations, each additional vendor often creates more work for already busy HR teams.

Mid-sized organizations (1,000–2,499 employees) report the highest rates of cost pressure (**22%**). Many have established mobility programs, but still face challenges with cost visibility and forecasting.

Larger organizations (2,500+ employees) are more likely to report challenges related to **managing providers across multiple countries**. As international hiring expands, coordinating immigration programs across different regions can become more difficult.

The challenges vary by company size, but organizations across the board report *difficulties managing fragmented mobility programs.*

Chapter 4

The capabilities employers value most

What HR Leaders Are Demanding

While respondents reported a range of challenges, they were remarkably consistent about what they want from mobility providers.

Integration, automation, and visibility emerged as the most important priorities across the survey.

Rated as "must-have" or "very important"

Seamless employee experience across the mobility journey

83%

HRIS and people-system integration

82%

Automation and workflow efficiency

82%

Support for complex mobility scenarios

81%

Full-service immigration management

81%

Streamlined document management

80%

Unified case files and communication history

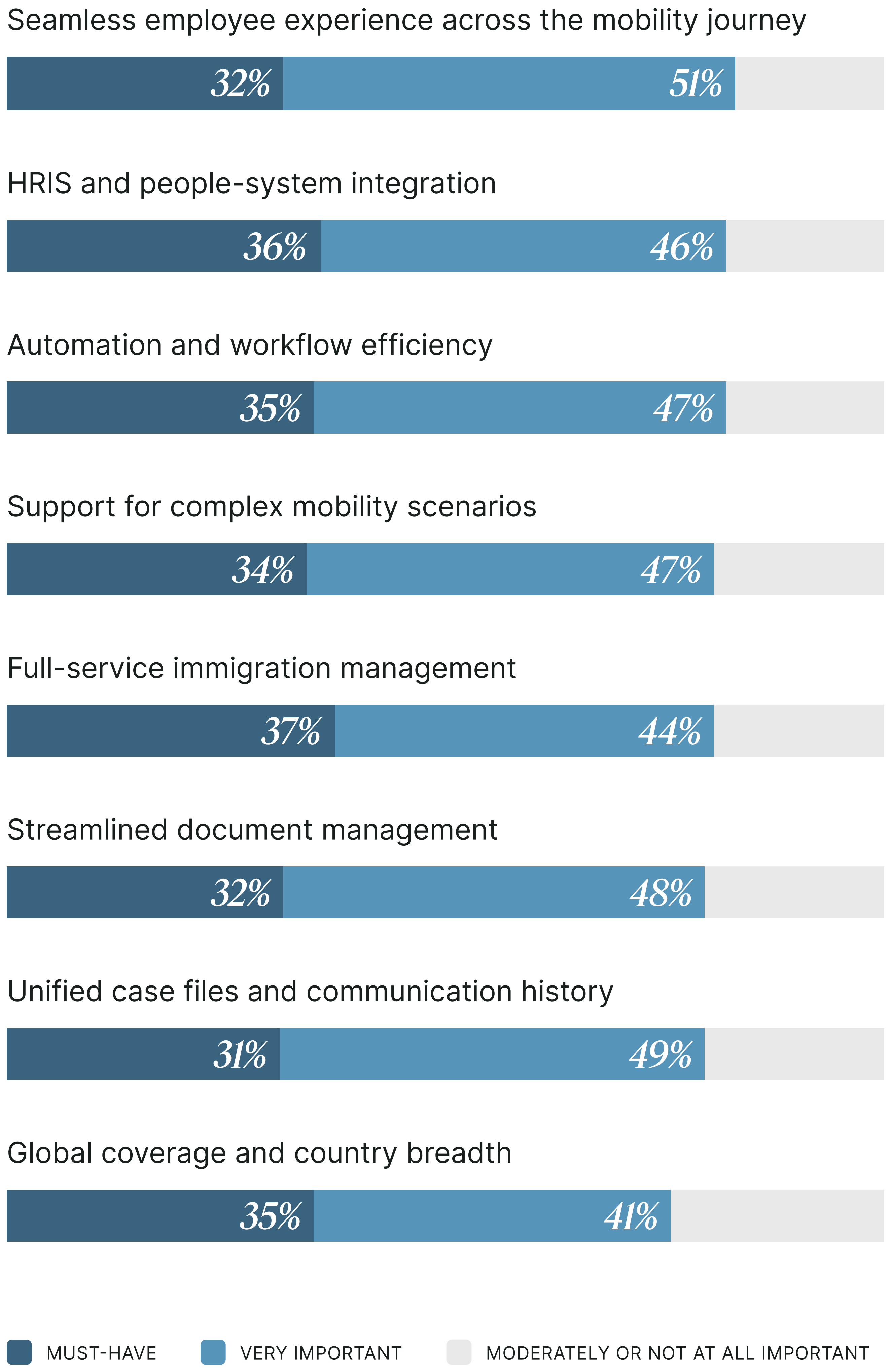
80%

Global coverage and country breadth

76%

Employers want immigration data connected to their people systems, workflows that require less manual work, and better visibility for employees throughout the mobility process.

When evaluating mobility providers, how important are the following capabilities?



The AI Question: Demand Is Real, but Adoption Is Uneven

AI-driven capabilities present a more nuanced picture. Overall, 67% of respondents rate AI-driven insights as “must-have” or “very important” — a significant majority. But that headline obscures real variation by market.

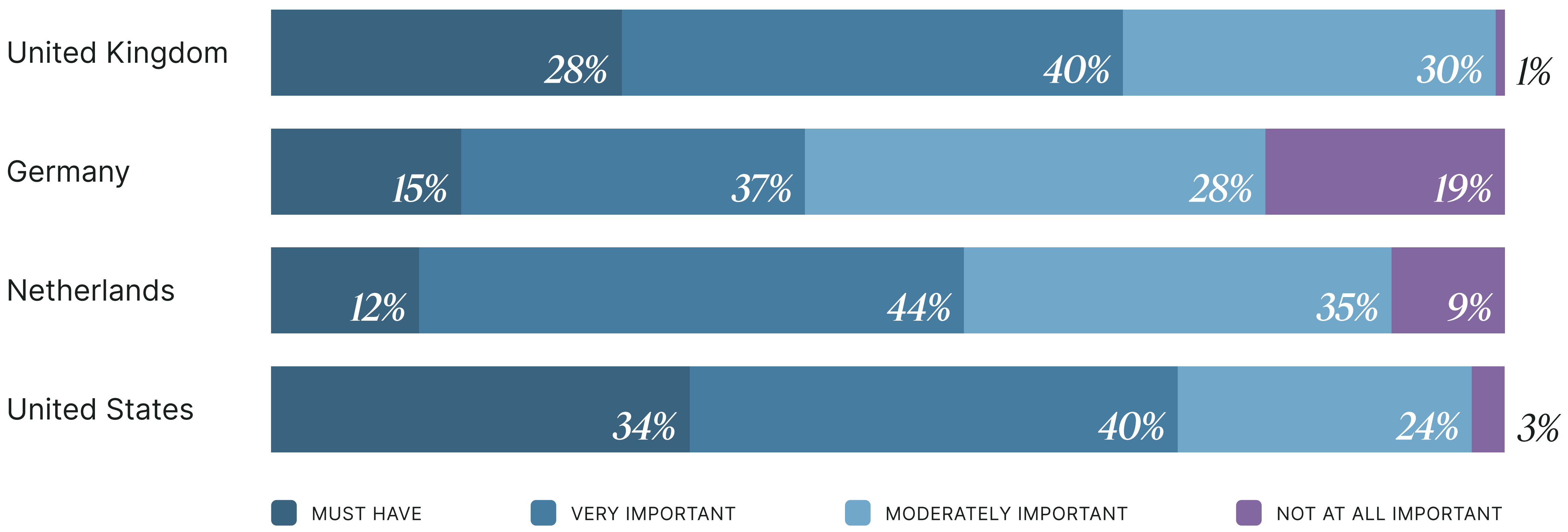
US respondents are the most AI-forward: Seventy-four percent rate AI capabilities as essential. UK respondents are close behind at 68%. But German respondents are more cautious: only 43% rate AI as essential, and 19% say it is “not at all important.” Dutch respondents fall in between, at 56%.

At the same time, AI and automation rank as Germany’s top investment priority for 2026. Together, these findings suggest that while German employers are taking a more cautious approach to AI today, many still see it as an important area for future investment.

For mobility providers introducing AI capabilities, the German market in particular will require a different approach, one that emphasizes transparency, human oversight, and compliance compatibility rather than efficiency gains alone.

When asked to identify the single most important capability they would like from a mobility provider, respondents most frequently selected AI-driven cost and risk insights (18%). While interest in these tools is high, adoption remains uneven across markets and organizations.

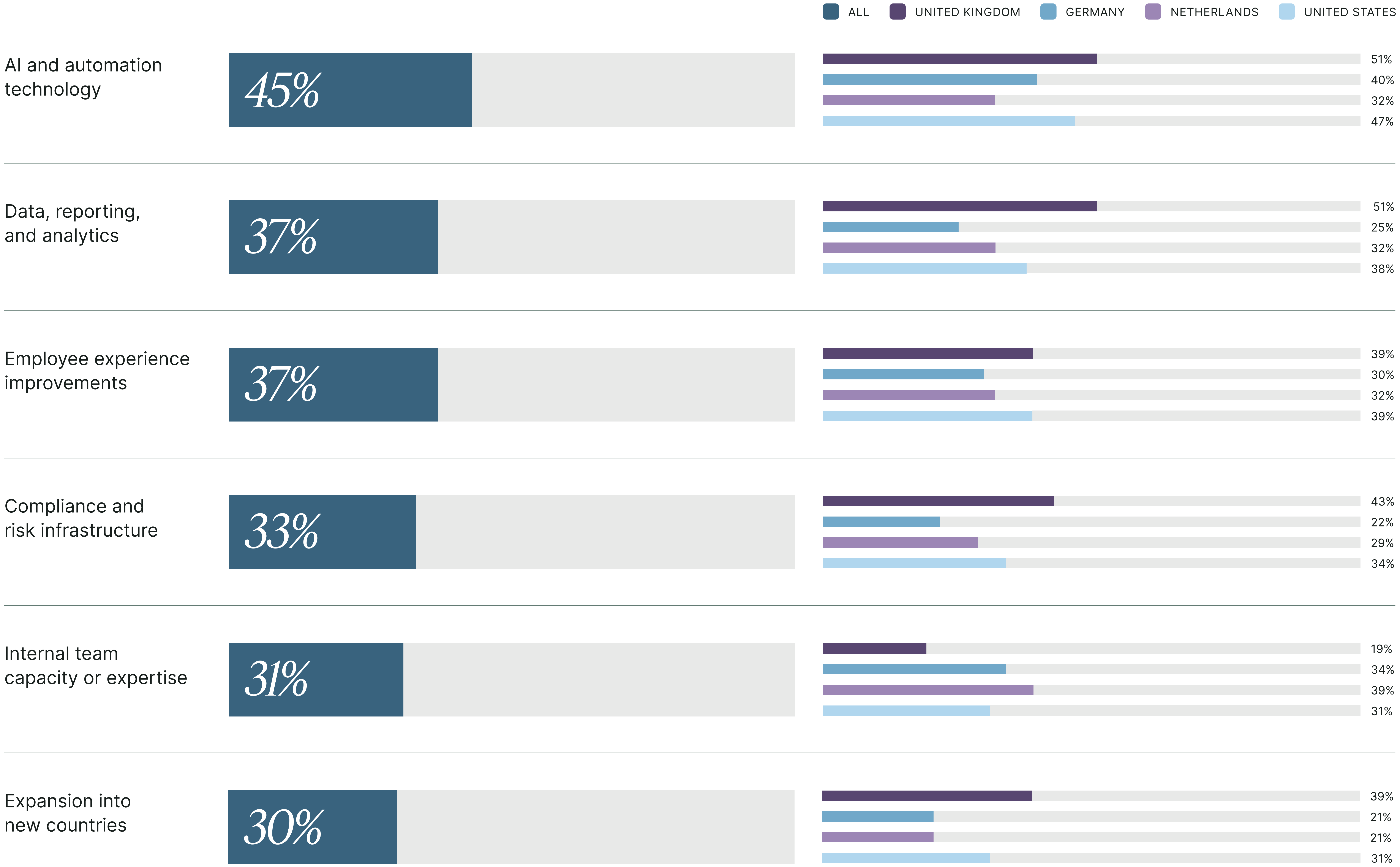
AI demand in global mobility varies by market



Investment Priorities for 2026: The Road Map Is Written

When asked about their top investment priorities for the coming year, respondents were specific:

Breakdown by country



The UK stands out as the most investment-forward market: Fifty-one percent of UK respondents identified AI and automation as a top priority (versus 40% in Germany and 32% in the Netherlands), and 43% mentioned compliance and risk infrastructure, a reflection of the ongoing complexity of post-Brexit immigration compliance.

Germany's investment priorities tell a more nuanced story. Although German respondents are more cautious about AI today, AI and automation still rank as their top investment priority for 2026 (40%). Internal capacity (34%) and compliance infrastructure (22%) also rank highly, suggesting organizations are investing in both technology and the people needed to support it.

Twenty-one percent of respondents identified provider consolidation or upgrading providers as a top investment priority. The finding suggests that many organizations are evaluating whether their current provider mix still meets their needs as mobility programs grow.

45% list **AI and automation technology** as a top investment priority for 2026.

Chapter 5

Hiring speed, fill rates, and employee retention

The ROI of Getting Global Mobility Right

46.9 Days	**Average time-to-start for international hires**
73.4%	**Average fill rate for roles requiring sponsorship**
73.8%	**Retention rate 24 months post-permanent residence**

The survey measured three outcomes tied to mobility programs: hiring speed, fill rates, and employee retention. Together, these metrics help show how immigration programs can affect an organization's ability to attract and retain talent.

TIME-TO-START

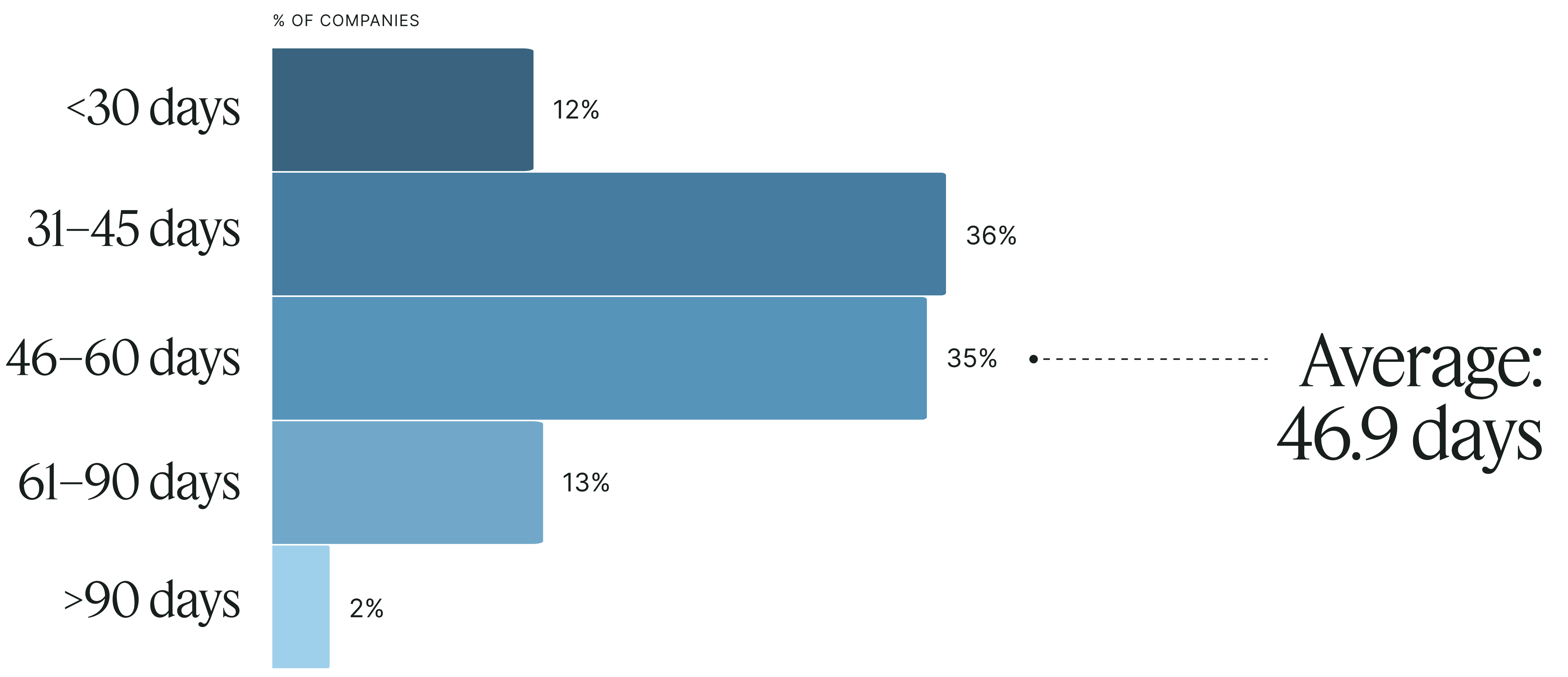
46.9 Days on Average

The average time-to-start for international hires, from offer acceptance to day one, is 46.9 days across the full survey population.

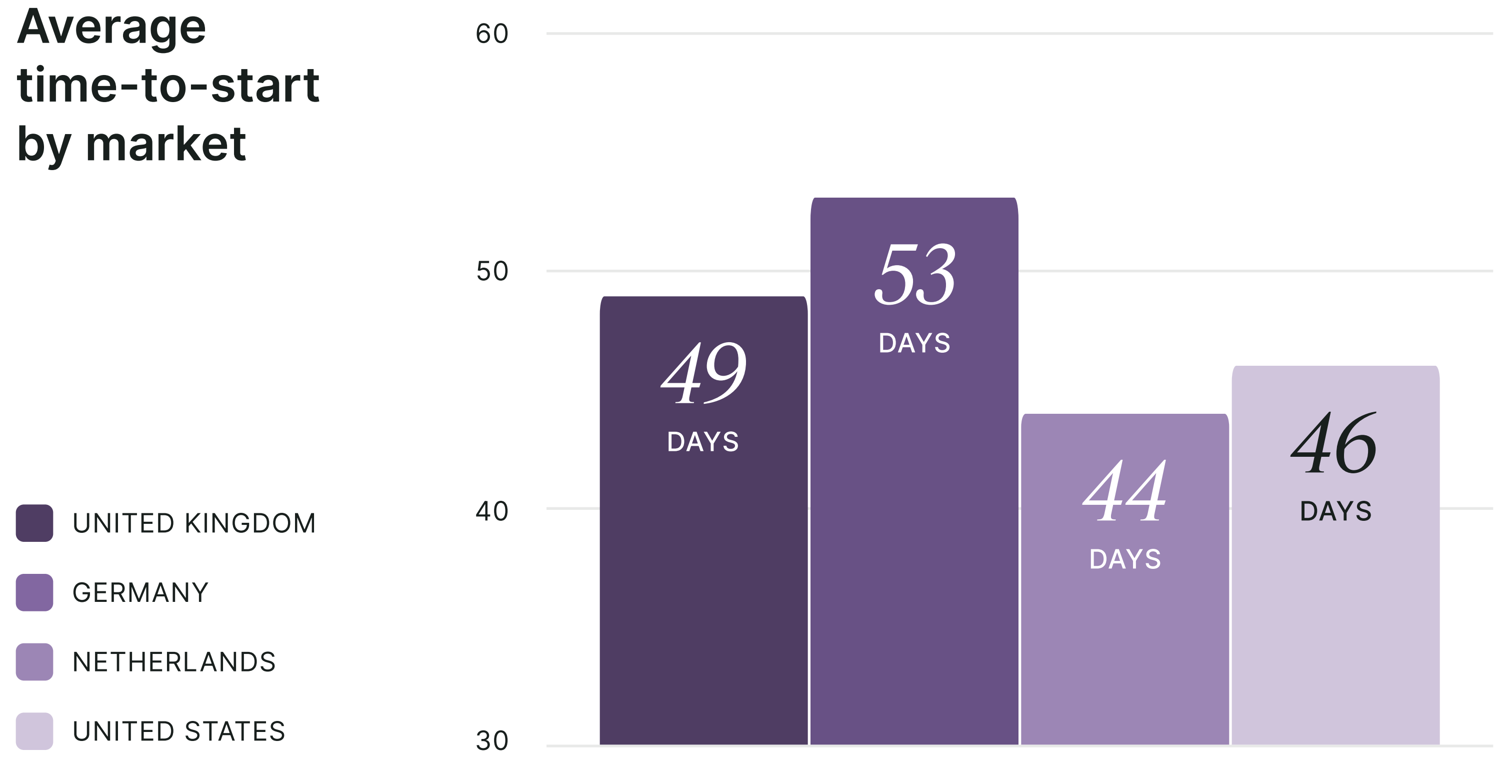
This number means different things depending on context. For organizations competing for specialized technical talent in tight labor markets, a 47-day onboarding runway is a meaningful advantage if it is predictable and reliable. It becomes a liability when unpredictability turns that 47-day average into a range of 30 to 90 days, with no way to know in advance which outcome a given hire will produce.

The distribution in the data tells this story clearly. Twelve percent of respondents report typical time-to-start under 30 days, while 36% report 31–45 days. Thirty-five percent report 46–60 days, 13% report 61–90 days, and 2% report more than 90 days. Average time-to-start varies somewhat by market, ranging from 44 days in the Netherlands to 53 days in Germany. However, the overall pattern is similar across all four countries. Faster time-to-start gives organizations an advantage when competing for international talent. The organizations at the fast end of this spectrum have built the systems and provider relationships that make speed and predictability possible simultaneously.

Typical time-to-start for international hires, offer acceptance to day one



Average time-to-start by market



FILL RATE

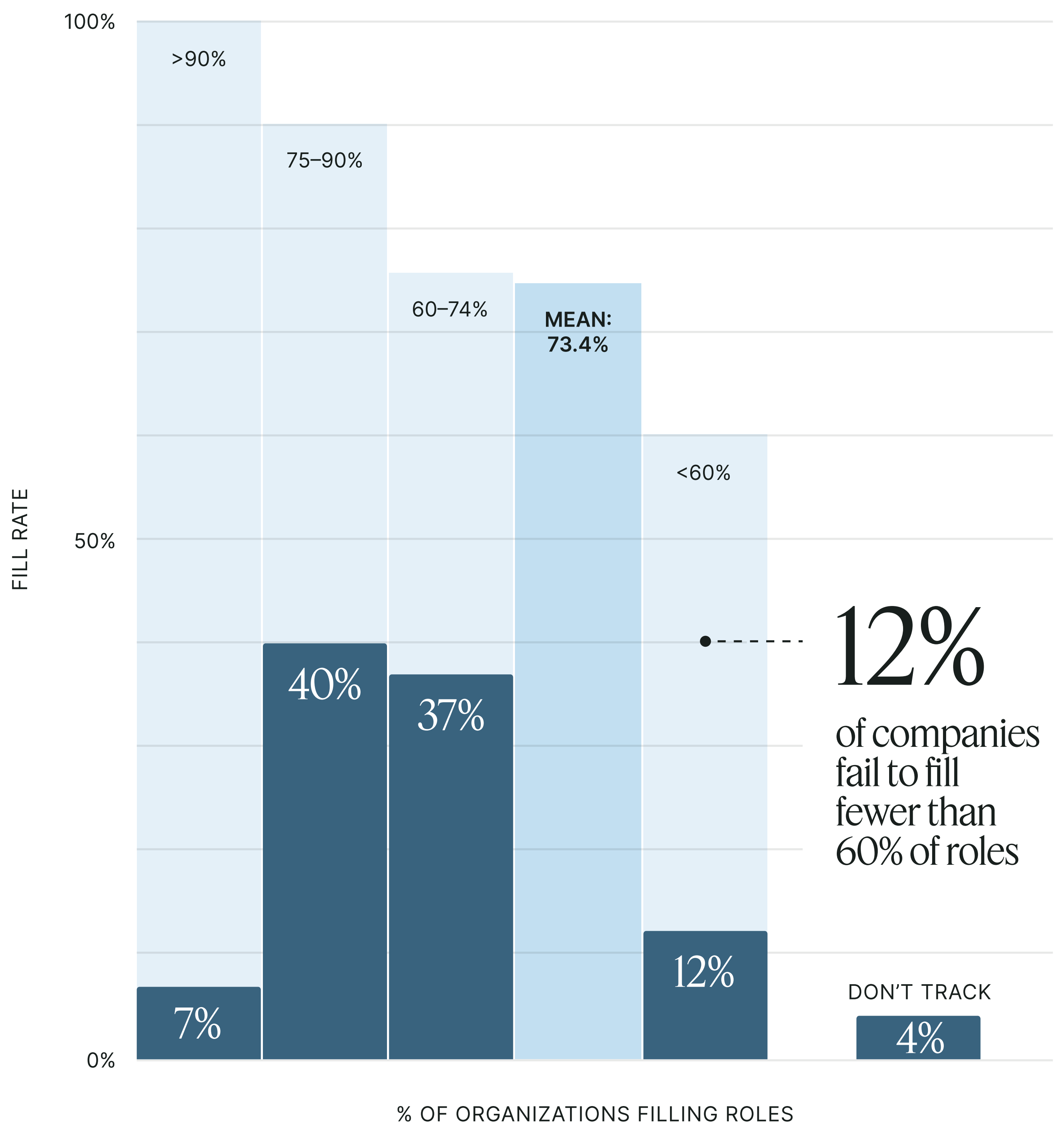
73.4% for International Roles

Respondents reported an average fill rate of 73.4% for roles requiring international hiring or sponsorship. The range is significant: Seven percent of organizations are filling more than 90% of these roles; 12% are filling fewer than 60%.

This spread is a function of mobility program capability. Organizations with integrated, well-resourced programs can pursue international talent with confidence, knowing their processes will support successful hires. Organizations with fragmented, unpredictable programs face a different reality: they may pursue international candidates but lose them to delays, cost overruns, or processing failures that more capable competitors avoid.

A 13-point gap between the average fill rate (73%) and the fill rates reported by some organizations (60% or lower) can have a significant impact on hiring outcomes, particularly in roles where specialized skills are scarce and local talent pools are shallow.

Fill rate for roles open to international sponsorship in the past 12 months



LONG TERM RETENTION

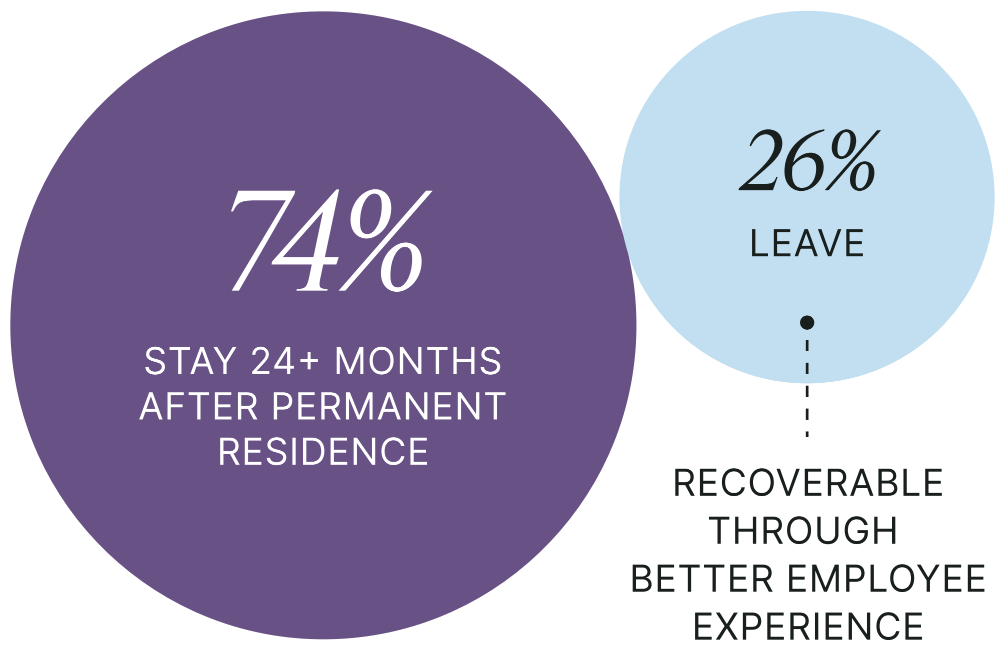
73.8% at 24 Months Post-Permanent Residence

Among sponsored employees who receive permanent residence, 73.8% remain with the organization at least 24 months afterward. This metric focuses on employees who have been through a lengthy immigration process and received long-term sponsorship from their employer.

A 74% retention rate in this population suggests that mobility programs, when they function well, can support long-term employment relationships. For employers, that means many sponsored employees remain with the company well after receiving permanent residence.

It also highlights an opportunity. Twenty-six percent of sponsored employees leave within 24 months of receiving permanent residence. While the survey does not explain why, it suggests there is room to improve retention among a group of employees in whom organizations have already made a significant investment. Employee experience improvements, which 37% of organizations identify as a top investment priority, may help strengthen those long-term employment relationships.

Long-term retention among sponsored employees



Immigration as a Competitive Tool

Respondents mention immigration as a contributing factor in winning or retaining candidates an average of 10.37 times per year. **Forty-three percent report doing so 10 or more times annually.**

This means that for nearly half of organizations surveyed, immigration capability is a recurring, active element of their talent strategy, rather than an occasional exception or a last resort. It is a tool HR leaders reach for, repeatedly, when competing for candidates who have options.

Organizations that can deploy this tool reliably, that can say with confidence what a sponsorship will cost, how long it will take, and what the candidate's experience will be, have an advantage over those that cannot.

How often did your organization cite immigration as a factor in winning or retaining a candidate in the past 12 months?

Nearly half of organizations use immigration to *recruit or retain candidates*

Where Mobility Is Going

The findings in this report suggest that many organizations are rethinking how they manage global mobility. Programs that were built for occasional international hires are being asked to support larger and more complex hiring needs.

Organizations are investing in automation, AI, reporting tools, and closer integration with HR systems. Many are also looking for ways to reduce administrative complexity and improve visibility into their programs. As global hiring becomes more common, the organizations that adapt may be better positioned to attract and retain talent across borders.

Five Actions for HR Leaders in 2026

01

Audit your coordination overhead honestly.

Map the administrative workflow behind your last 10 international hires. Count the touchpoints across vendors, the manual handoffs, and the hours spent tracking status updates across systems. The number you arrive at is your baseline for what integration could eliminate.

02

Improve cost visibility.

If your team cannot reliably predict what an international hire will cost, it becomes harder to plan hiring needs, allocate budgets, and move quickly when the right candidate becomes available. Organizations with better visibility into costs and timelines are often better positioned to use global hiring as a competitive advantage. That visibility is much easier to achieve when immigration workflows are integrated with the rest of your HR systems.

03

Evaluate your provider model against your actual program volume.

A multi-vendor model that worked at five international hires per year may be the wrong structure at twenty. As your global hiring volume grows, the coordination costs of fragmentation grow faster. Reassessing your provider landscape as the program scales is good operational hygiene.

04

Invest in employee experience as a retention mechanism.

While most sponsored employees remain with their employer after receiving permanent residence, 26% leave within two years, suggesting there is room to improve retention.

05

Get ahead of AI adoption before competitors do.

The 45% of organizations planning to invest in AI and automation in 2026 aren't all equally prepared. Teams with centralized case data, consistent workflows, and integrated reporting will be able to put these tools to work faster, while those relying on disconnected systems will have a harder time.

Methodology

The findings in this report are based on a survey of 500 HR decision makers responsible for global mobility programs, conducted by Sapio Research in February 2026 on behalf of Boundless.

Respondents were recruited from online partner panels via email invitation and completed a structured online questionnaire. All respondents were screened to confirm decision-making responsibility for global mobility, immigration, or international hiring programs.

Participating organizations were headquartered in the United States, United Kingdom, Germany, and the Netherlands and represented a range of company sizes from 250 to more than 5,000 employees.

Results are subject to sampling variation. At the 95% confidence level, survey results for the full sample do not vary by more than ±4.4 percentage points from results that would be obtained from a census of the represented population.

Data was analyzed to identify trends in mobility program structure, operational challenges, capability priorities, and investment intentions. Country-level subgroup analysis was conducted for the four represented markets. Subgroup data should be interpreted with attention to smaller base sizes, particularly for the UK, Germany, and Netherlands samples (n=66–67 per market).

BOUNDLESS

About Boundless

Boundless is a tech-enabled immigration and global mobility firm with deep in-house legal expertise that helps employers manage immigration and global mobility programs. Its platform combines immigration case management, employee communication tools, document collection, and HR system integrations to help organizations support international hiring.

Boundless serves employers across a range of industries and company sizes, from growing mid-market businesses to large multinational organizations.

Learn more at *boundless.com*