



**Q4 2025**

# Global Mobility Insights

As we close out 2025, we continue to see shifting economic conditions, regulatory changes, and the growing need for flexibility in workforce strategies. In this report, we provide a concise summary of some current trends and challenges, along with practical insights. Looking ahead to 2026, we highlight emerging priorities and potential disruptors to help you plan with confidence and agility in an increasingly dynamic global landscape.



## Housing

### The Renters' Rights Bill, England

On 27<sup>th</sup> October, the Renters' Rights Bill received Royal Assent, thus securing a fairer future for 11 million private renters in England. Under the new legislation, Section 21 'no fault' evictions will be abolished, empowering renters to challenge poor conditions and unreasonable rent increases without fear of retaliatory eviction and subsequent homelessness. The Bill will rebalance landlord-tenant relations across England, giving renters the right to end tenancies with two months' notice, whilst protecting legitimate landlord interests through strengthened repossession grounds. There will be no changes enforced until 1st May 2026, when existing tenancies will transition to APTs (Assured Periodic Tenancies), monthly rolling contracts, which can be terminated by the Tenant at any time and for any reason upon serving 2-months' notice, offering a great deal of flexibility. Please note, this is only applicable to tenancies under £100,000 per year and will not impact Company leases and Non-Housing Act tenancies.

### Proposed Tourist Tax (England)

There is an ongoing government consultation taking place with respect to a proposed "Overnight Visitor Levy" (Tourist Tax) on hotel stays, B&Bs, and short-term lets which will include Airbnb. This will empower English mayors and local councils to introduce this levy in their areas with the idea that this extra funding will go directly towards supporting the local economy and improve the visitor experience. While the chancellor is widely expected to announce the move in the coming months, nothing has yet been formalised.

### VAT Rates for Short-Stay Accommodation, Holland

The Dutch Government has announced a significant change in VAT rates for short-stay accommodation, including hotels, holiday homes, B&Bs, guesthouses, hostels, furnished mobile homes, and accommodation booked through platforms such as Airbnb. Providing that the Bill receives final approval from the Senate, which is likely, from 1st January 2026, the VAT rate will increase from 9% to 21%. Through this change, the government aims to increase tax revenues and close a budget gap.

## Temporary Accommodation, South Africa

The country's busy 2025 events calendar – including G20 engagements and regional investment forums – has tightened availability in key hubs, especially Cape Town and Johannesburg. Many serviced accommodation providers have introduced dynamic pricing models, with notable rate increases during high-occupancy months.

## Temporary Accommodation, West Africa and East Africa

In markets like Accra and Nairobi, limited branded serviced accommodation continues to pose challenges for short-term assignments.

## Temporary Accommodation, the UAE

Serviced apartments across Dubai and Abu Dhabi are experiencing extremely high occupancy levels, driving up costs, and making last-minute bookings increasingly difficult.

## Rental Housing, South Africa

Driven by both local residents and corporate relocations, rental demand in major cities such as Cape Town and Johannesburg remains high. A shortage of quality housing stock alongside stricter tenant vetting by landlords is extending search timelines and negotiation periods. In addition, utility costs and municipal rate increases continue to exert upward pressure on rental prices.

## Rental Housing, Kenya and Nigeria

Nairobi's rental market is stabilising, with moderate price corrections following two years of steady increases. In Lagos, ongoing infrastructure upgrades are improving expat neighbourhood appeal, though affordability remains a challenge.

## Rental Housing, the UAE

In Dubai, after a period of rapid increases, rents in many parts of the city are expected to rise more slowly as we move through 2026. This is due to a predicted significant influx of new residential units across the city. However, in premium areas such as Downtown, rents are expected to stay relatively resilient due to continued demand and limited supply. In Abu Dhabi, communities are reporting occupancy rates of 95%+, even as new rental units are being delivered. There's a clear premium for 'lifestyle', waterfront, and amenity-rich areas such as Saadiyat Island, Yas Island, Al Reem Island, and Al Raha Beach. These areas are showing stronger price and rental growth than more inland or older districts.



# Shipping

## Mexico

Ongoing protests in Mexico, which are primarily driven by public upset over the lack of government action in relation to crime and corruption, has resulted in the following disruption:

- Highways and major routes remain blocked, affecting freight movement.
- Severe congestion at the Port of Manzanillo persists, following the port's reported closure during protests.
- Lázaro Cárdenas is facing customs bottlenecks and delays of up to 36 hours.
- Ensenada, Altamira, Veracruz and Progreso are reporting delays of 2 – 4 days.
- The Central American ports of Acajutla and Corinto are experiencing congestion caused by rerouted cargo. (K2 have been avoiding Acajutla and routing containers via Puerto Barrios in Honduras for several months now.)
- The South American ports of Navegantes and Paranaguá are experiencing medium congestion.
- The US ports of Los Angeles, Long Beach and New York are reporting 2 – 3-day delays caused by diverted shipments.
- The Peruvian ports continue to experience congestion, lack of container availability, and uncertainty about vessel departures/arrivals. However, the situation is less severe than it was and is improving day by day.

## Panama and Paraguay

River water levels are continuing to affect shipping frequencies.

## Venezuela

Due to political tensions between Venezuela and the USA, restrictions on shipments between the two countries are likely to increase very soon. Steamship lines continue to make unexpected changes to sailing schedules, making transit times unpredictable and creating issues with container availability. As a result, organisations are having to utilise warehouse handling services more often than usual.

## Europe

European ports continue to operate under significant pressure due to labour shortages, congestion, recent incidents, and long-term infrastructure constraints. For example, there are ongoing nationwide strikes in Portugal, and Rotterdam is currently the most congested port in northern Europe, with an increasing number of carriers deciding not to call there. From 15<sup>th</sup> December 2025 – 7<sup>th</sup> January 2026, these challenges will be amplified by the seasonal factors potentially resulting in additional costs such as demurrage coming into play.





## South Africa

During peak export periods, delays of 3 – 5 days persist due to poor infrastructure challenges. However, Transnet, which is South Africa's state-owned freight logistics company, has recovery initiatives in place and has increased investment in logistics modernization which are driving gradual improvement.

## West Africa

Ghana's Tema–Mpakadan rail line is now operational and is beginning to yield benefits. These include improved inland cargo distribution and reduced congestion at Tema Port. Nigeria's port reforms and currency volatility continue to make maintaining predictability within logistics challenging.

## The African Continent

Ongoing instability in the Red Sea region continues to affect African-bound shipping lanes, resulting in increased insurance premiums and rerouting via longer maritime paths.

## The Red Sea

Despite there being fewer reported attacks, the situation in the Red Sea remains unpredictable. The risk of disruption persists, particularly if regional tensions escalate. However, from a UAE perspective, there are cautious but encouraging signs that transits via the Suez Canal and the Red Sea may soon resume. There may be logistical complexities involved in this resumption, therefore from the point of the first transit taking place, it could take weeks/months for normal traffic levels to be fully restored.

From a European perspective, limited insurance availability and the workability of Cape of Good Hope-based network structures means that an immediate return to Red Sea routing is not expected.

## China

On 24<sup>th</sup> September, in a significant development for international logistics, China opened a new commercial shipping route to Europe via the Arctic. The *China–Europe Arctic Express*—also known as the *Polar Silk Route*—connects major Chinese ports with Felixstowe, Rotterdam, Hamburg and Gdańsk. The transit time of 18–19 days represents a major improvement on traditional Suez Canal routes, potentially redefining global trade efficiency.



# Immigration

## LATAM

During this quarter, there have been several important developments within LATAM which demonstrate the region's continued progress toward economic expansion, investment attraction, and the modernisation of immigration systems. Several countries have introduced new regulations, digitalisation initiatives, and investment policies which strengthen their position as key destinations for global business and talent mobility.

For further information, please refer to [K2 X Border's 5<sup>th</sup> December LinkedIn Article](#).

## UK

The Home Office has launched a public consultation outlining significant proposed reforms to the criteria for Indefinite Leave to Remain (ILR), also known as Settlement. Many sponsored workers would be impacted by the proposed reforms – detailed below – as would GM/HR teams managing long-term workforce planning.

- Most workers would need to have lived in the UK for 10 years before they would qualify for ILR.
- The stand-alone, 10 year long residence route would be abolished, with its function absorbed into the new 10-year baseline and adjustment framework.
- Applicants would need to meet mandatory conditions, including:
  - ~ Good conduct (no serious criminal issues)
  - ~ English language competency at C1 Level (this may reduce the qualifying period by 1 year)
  - ~ Successful completion of the Life in the UK test
  - ~ Evidence of steady employment, taxable income and continued economic participation
- A review of criminality and suitability thresholds across all routes.

- Certain high-earning or highly skilled categories would have shorter qualifying periods.
- Workers sponsored in roles below RQF Level 6 (typically lower paid or lower skilled positions) would need to have lived in the UK for up to 15 years before they would qualify for ILR.

For further information, please refer to [K2 X Border's 2<sup>nd</sup> December LinkedIn article](#).

## Sweden

The minimum salary requirement for individuals applying for a Swedish Work and Residence Permit has changed: their monthly salary must now be at least 80% of the Swedish median salary, which is currently SEK 29,680 per month. For individuals being accompanied by family members, there is now also a new maintenance requirement: their salary must cover actual housing costs and basic living expenses for all household members. For example, if an individual is being accompanied by a cohabiting spouse or partner, once housing expenses have been taken out of their monthly salary, they must have at least SEK 10,219 left over to cover basic living expenses for the household.

## Singapore

The Ministry of Manpower (MOM) in Singapore has released important updates related to the COMPASS framework, specifically Qualification criteria and the Shortage Occupation List (SOL). These updates will take effect from 1<sup>st</sup> January 2026 and will apply to both new and renewal EP applications.

For further information, please refer to [K2 X Border's 4<sup>th</sup> December LinkedIn article](#).



## Employment contract legislation update

### California

A newly introduced California bill, which applies to contracts signed on or after 1<sup>st</sup> January 2026, strengthens restrictions on employment contract terms. It makes it unlawful for employers or training providers to include terms that require a worker to repay money if they end their employment or work relationship. Any repayment clause that is triggered by an employee choosing to leave an employer will be treated as a restriction on that worker's ability to seek new employment. It will therefore be considered void and contrary to California public policy. If an organization enforces a prohibited clause, any affected workers will have the right to take action in court, and the organization may face civil penalties.

In addition, contracts for discretionary or unearned payments at the start of employment (e.g. sign-on bonuses or relocation assistance that isn't tied to job performance) will only be permitted if all the following conditions are met:

- The repayment obligation is memorialized in a separate, written agreement.
- Before the deadline for agreeing to the contract, the employee was given at least 5 business days' notice and expressly notified of the right to consult with legal counsel.

- The length of time that the employee must remain employed in order to avoid repayment does not exceed two years from the date of payment.
- Any repayment obligation is prorated and interest free. For example, if an employee resigns halfway through a two-year retention period, then they will only be required to repay half of their bonus.
- The employer agrees to only demand repayment if the employee voluntarily resigns or is terminated for misconduct. They may not demand repayment if the employee is terminated for reasons other than misconduct.
- The employer has offered the employee the option to defer receipt of their payment until completion of their full retention period. If receipt of payment is deferred in this way, then no repayment obligation may be imposed.

For further information, please refer to [K2 Corporate Mobility's 25<sup>th</sup> November LinkedIn article](#).

## KEEP AN EYE ON...

~ Two key mergers/consolidations involving USA HHG companies are currently underway. Given that 2025 move volumes in some markets have been lower than expected, it is possible that further mergers/consolidations will be announced over the coming months.

~ The merger between serviced accommodation providers SilverDoor and Synergy, due to complete in early 2026. Through the merger, SilverDoor aims to enhance its global proposition. The combined business will be headquartered in London and will maintain operations in 16 cities across 9 countries.

~ Chinese New Year in 2026 falls on Tuesday 17<sup>th</sup> February, marking the beginning of the Year of the Horse. Typically, celebrations last about two weeks and official holidays span 17<sup>th</sup> – 23<sup>rd</sup> February. These holidays would align with Ramadan, which is expected to begin on the evening of Tuesday 17<sup>th</sup> February and conclude on the evening of Wednesday 18<sup>th</sup> March – the exact dates are contingent upon the sighting of the moon. Both of these holidays create significant, predictable movement of people patterns that affect flights, logistics, and local transport globally, particularly in areas with large Chinese and Muslim populations.

~ The FIFA World Cup 2026, which will be hosted by Canada, Mexico and the USA from 11<sup>th</sup> June – 19<sup>th</sup> July 2026. Games will be played in the following 16 cities:

**Canada:** Vancouver, Toronto

**Mexico:** Guadalajara, Mexico City, Monterrey

**USA:** Los Angeles, San Francisco, Seattle, Dallas, Houston, Kansas City, Atlanta, Boston, Miami, NYC/New Jersey, Philadelphia

The event will have a major effect on housing rates and availability during the months of June and July. Given how busy the host cities will become, K2 advises that clients try to avoid assignee arrivals into them during this period.

[Download 'When the World Arrives'](#), a K2 guide which explores how major global events like the Paris 2024 Olympics and the FIFA World Cup 2026 affect corporate relocations, both international and domestic.

~ The 250<sup>th</sup> anniversary of American Independence on 4<sup>th</sup> July 2026. On this day, multiple celebratory events will take place across the country, including a significant international event in New York Harbor. These events will affect housing rates and availability in the host cities from the end of June through mid-July.

K2 continue to monitor all the areas detailed above, and will provide further updates as and when they come through. In the meantime, should you have any questions or concerns, please contact your K2 Account Manager.







*because it's personal*

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