

COVID-19: The impact for Global Mobility and the mobile workforce

PwC Global Mobility Pulse Survey Results



April 2020

PwC ran a global pulse survey to help People leaders and Global Mobility teams understand how companies are responding to COVID-19 in relation to their globally mobile workforce, how they compare and where they may need to take action. The survey was open for one week from March 31 to April 6 2020 and over 350 companies participated.

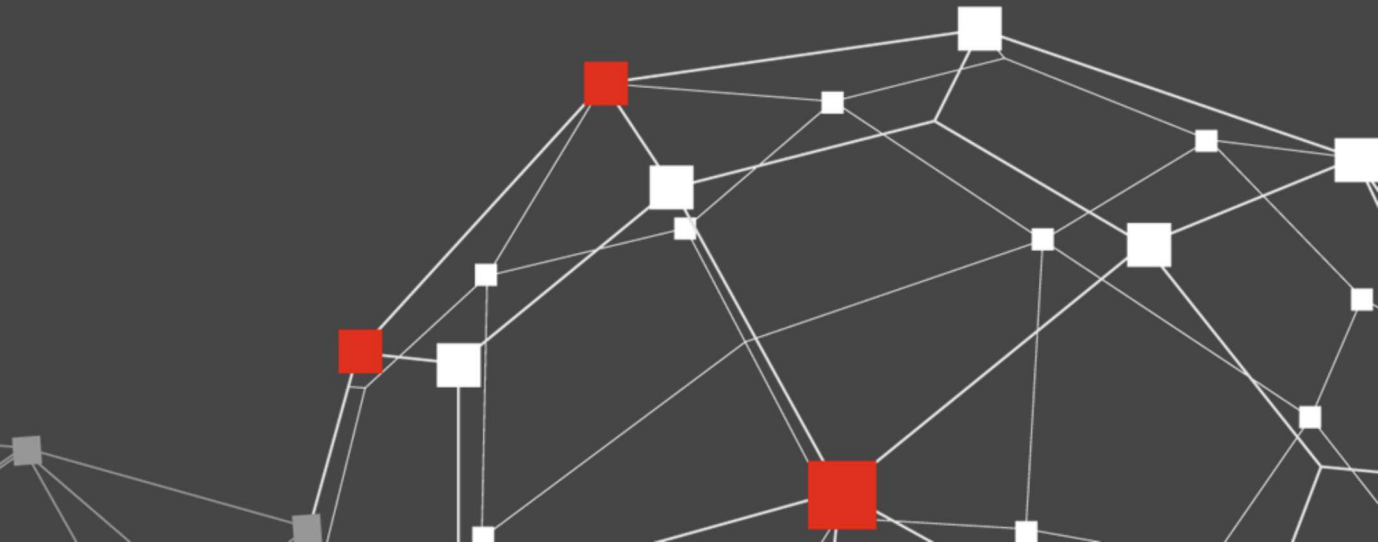
You'll find the global results in this report. All responses have been aggregated and anonymised.

We hope you find the results insightful.

Keep well and stay safe.

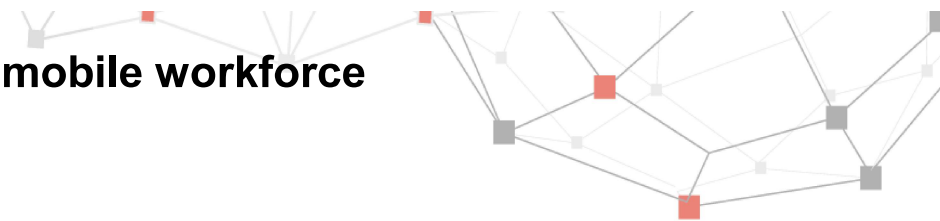
Contents

1 Overview and respondent demographics	3
2 Headline trends	4
3 Survey results	5
3.1 Planned international moves	6
3.2 Current international moves	9
3.3 Strategy	17



1 | COVID-19: The impact for Global Mobility and the mobile workforce

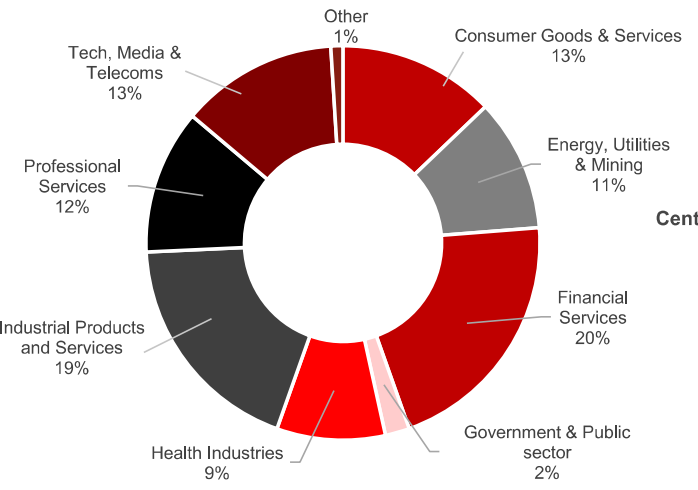
Overview and respondent demographics



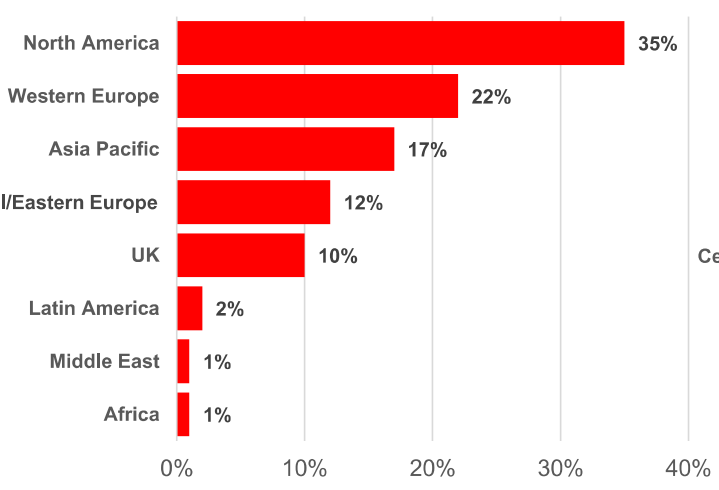
Overview of respondents



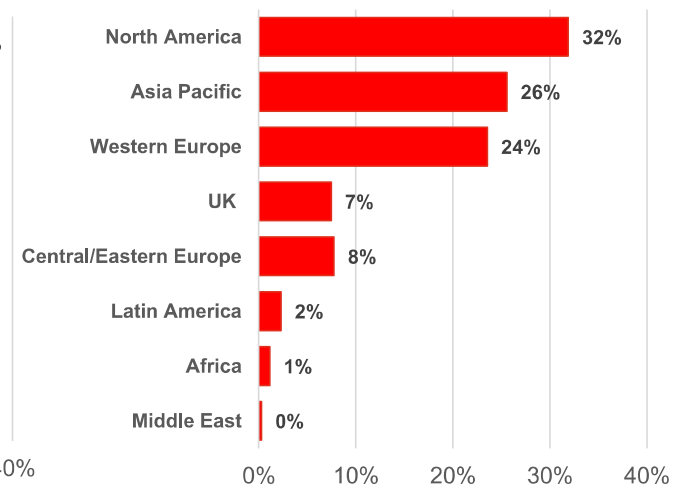
Breakdown of industry sector



Breakdown of Company HQ



Breakdown of respondent location by region

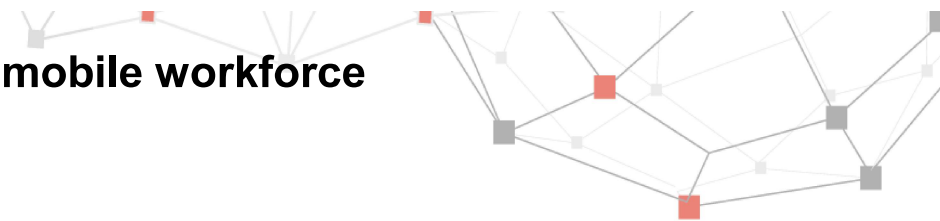


*Please note that in some cases, participants did not respond to all questions

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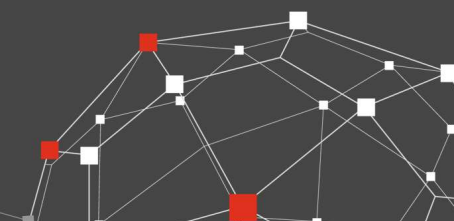
Headline trends



The survey looked at the actions companies are taking across three areas in relation to their globally mobile workforce.

The 3 areas are:

1. Planned international moves
2. Current international moves
3. Strategy



1. Planned international moves

- **Around half** of companies are allowing their people to **start their 'move' by working from their home country** (with some variations depending on industry sector and company HQ location).

2. Current international moves

- Almost **two thirds** of companies are allowing current mobile employees to **temporarily return to their home country**. Only a minority (**11%** of respondents) are offering additional cash support to cover additional costs.
- **Comms:** companies are busy with comms, both to mobile employees and their line managers. **70%** of companies say they are proactively communicating with their mobile employees, with **around 60%** doing the same with line managers of mobile employees.

3. Strategy

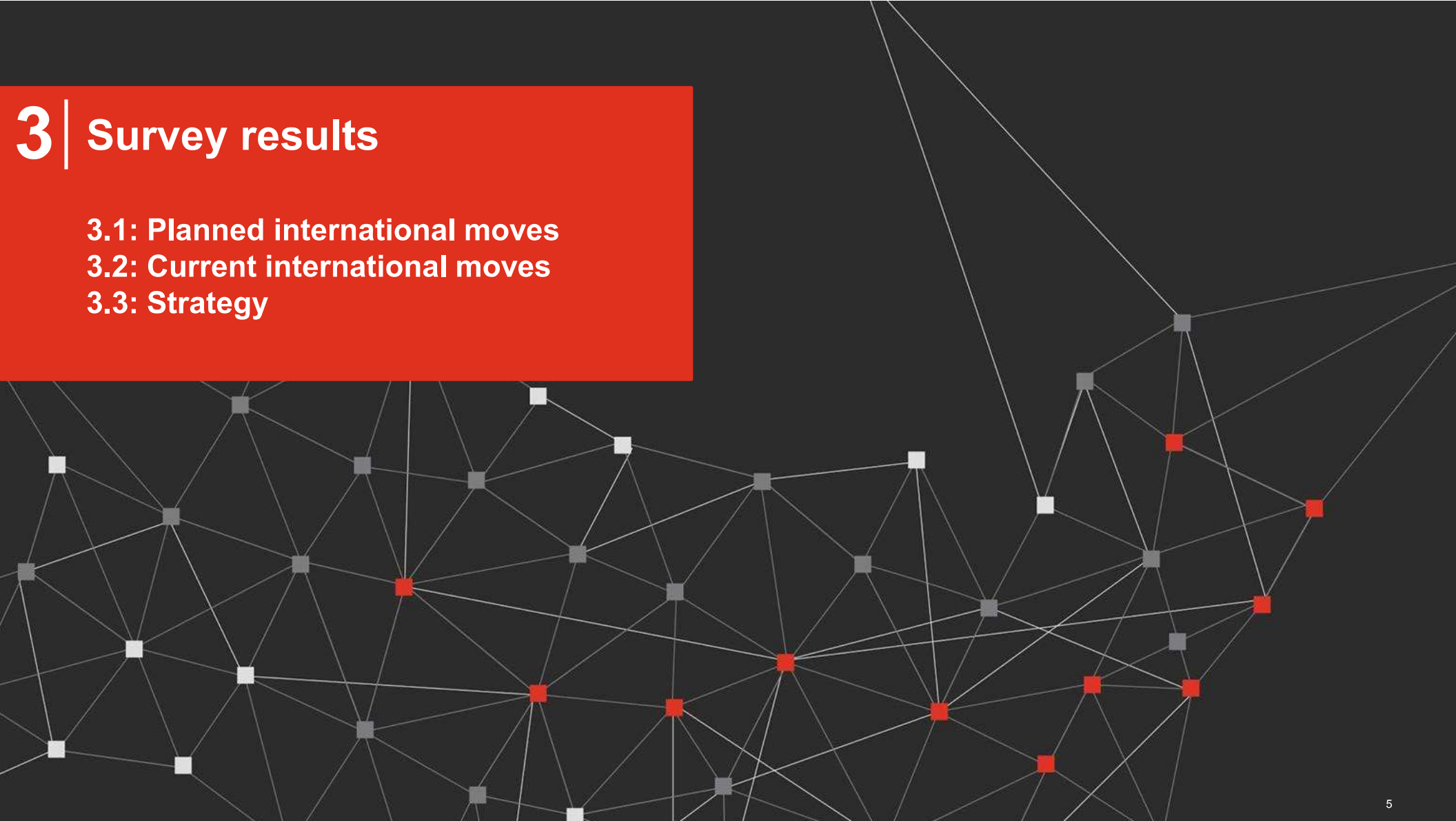
- **Top 3 priorities:** are 1) keeping up to date with regulatory changes; 2) work on comms and planning; 3) understanding who their mobile employees are and where they are. The implications of remote working is also a top priority for many.
- **Impact on future mobility:** the top answer was 'we'll return to business as usual as soon as possible with the same number of moves (**44%** of respondents). **20%** think there's likely to be a decrease in international moves, while **12%** think this will have a fundamental impact on workforce mobility.

3 | Survey results

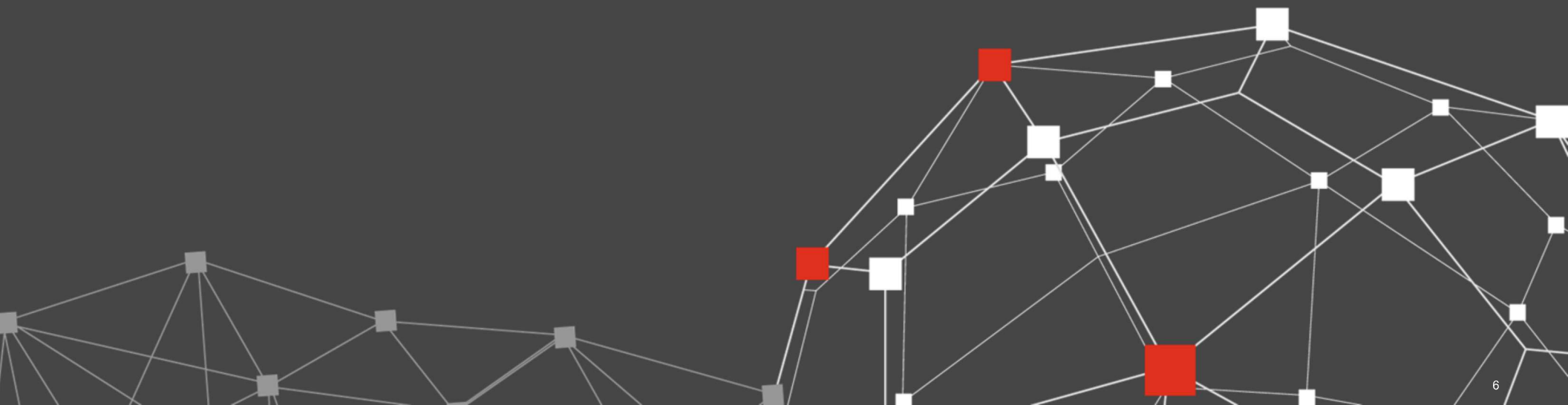
3.1: Planned international moves

3.2: Current international moves

3.3: Strategy

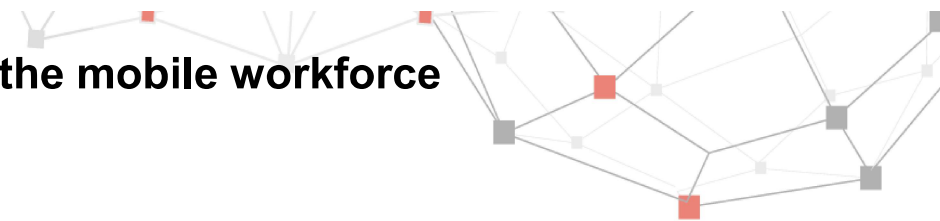


3.1 | Planned international moves

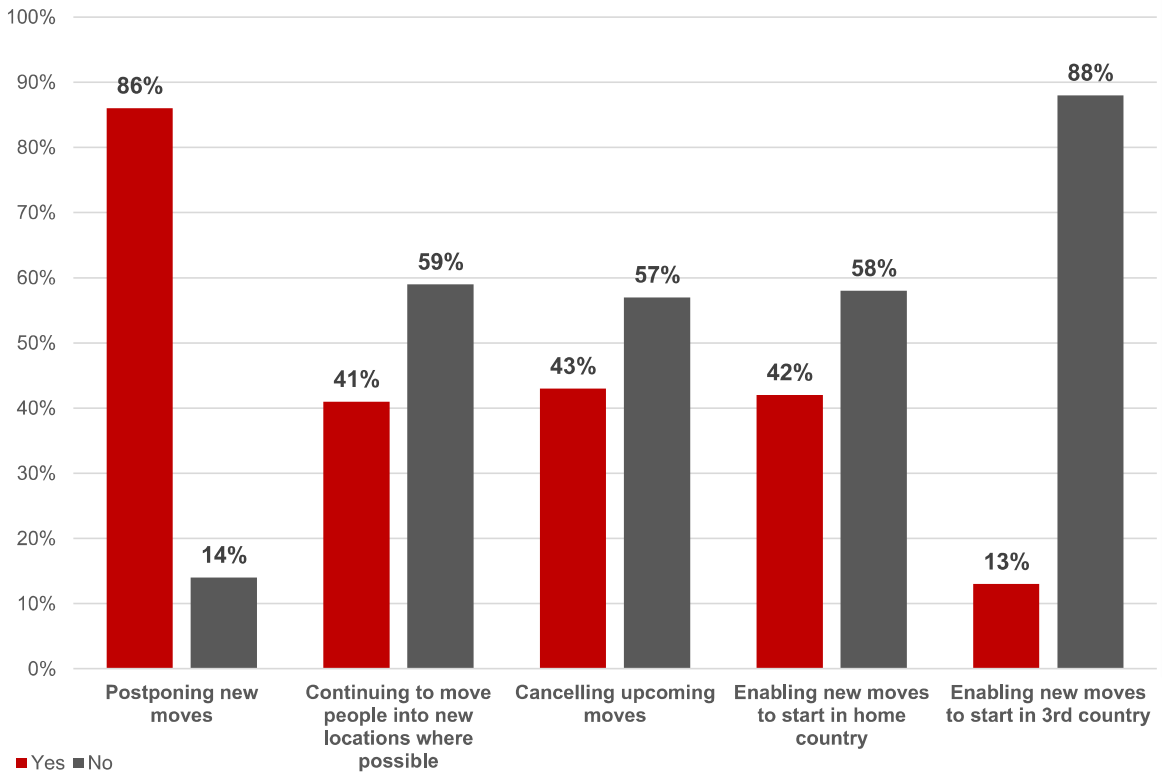


3.1 | COVID-19: The impact for Global Mobility and the mobile workforce

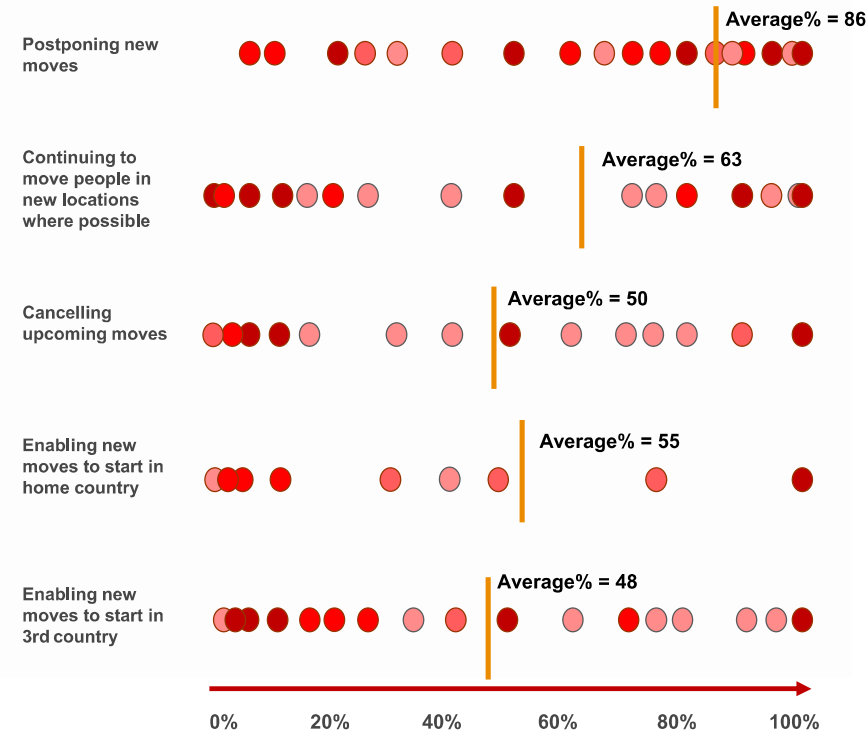
Planned international moves



A. What are you doing for upcoming international moves (e.g. international assignments and transfers)



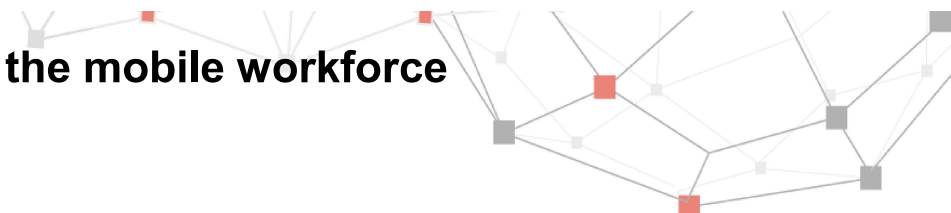
B. If Yes, % of planned international moves where this is the case



*Please note that in some cases, participants did not respond to all questions

3.1 | COVID-19: The impact for Global Mobility and the mobile workforce

Planned international moves



Sharing insights on what companies are doing for upcoming international moves

“ We’re only moving business critical people on any kind of mobility now. Only on an exceptional basis will we allow working from a third country due to lock down and quarantine.

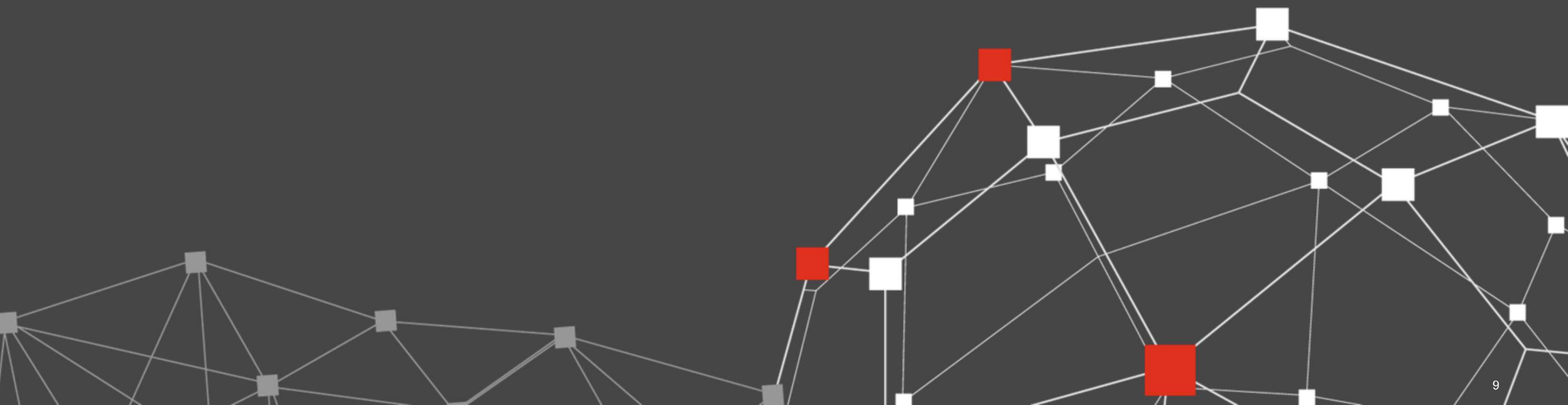
“ We are using this time to lay all the ground work for future relocations e.g. preparing cost estimates and relocation packages, starting the immigration process.

“ We are allowing all of our assignees to repatriate. No new moves are starting.

“ Relocations will happen once it is deemed safe. Until then, all new assignments will start remotely and our people will continue to work remotely.

“ Domestic relocations are continuing where possible unless restricted. We’re also still going ahead with international moves where we can but in the most part they are being delayed due to immigration challenges.

3.2 | Current international moves

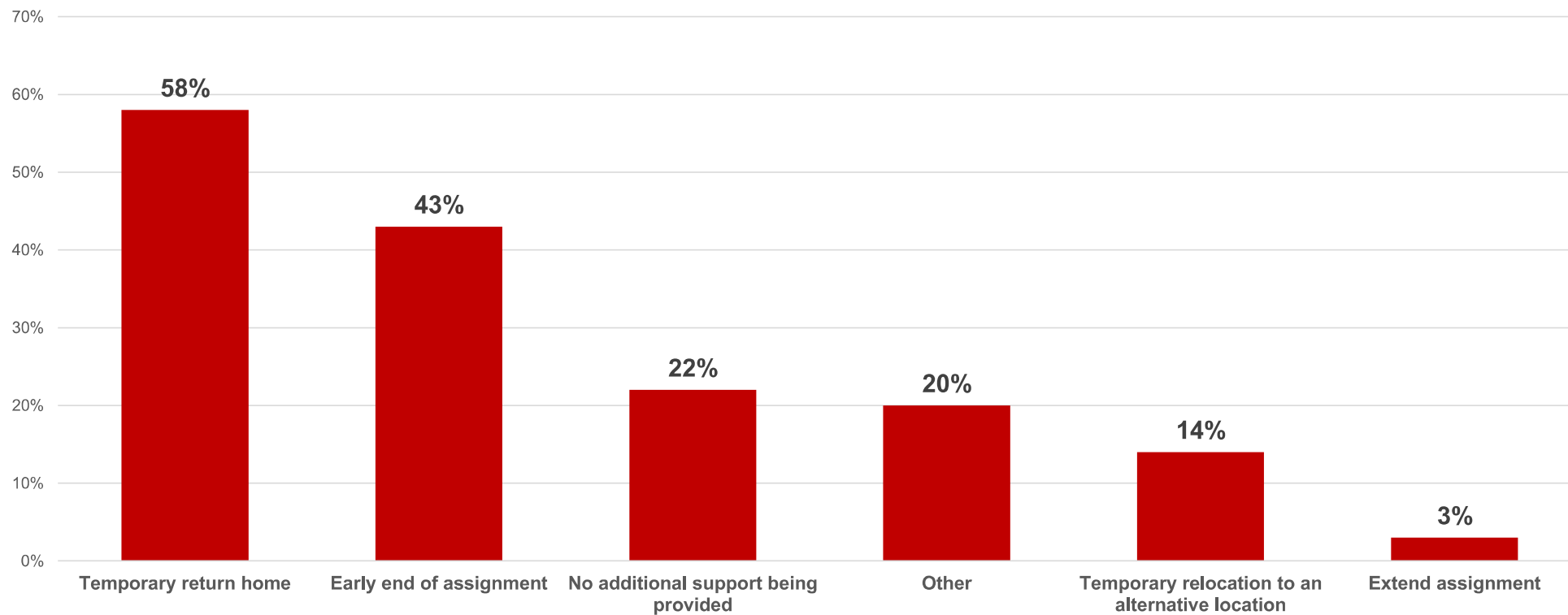


3.2 | COVID-19: The impact for Global Mobility and the mobile workforce

Current international moves



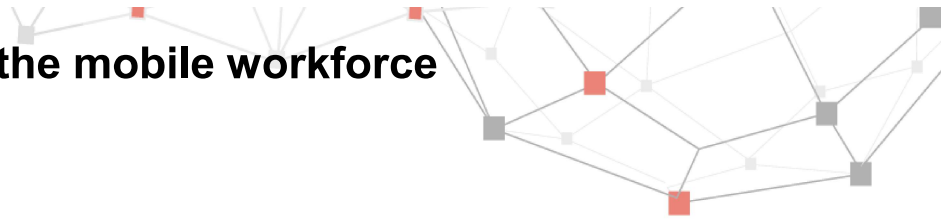
What options are you offering to mobile employees currently on assignment or transfer?



*Please note that in some cases, participants did not respond to all questions

3.2 | COVID-19: The impact for Global Mobility and the mobile workforce

Current international moves



Sharing insights on options companies are proving to mobile employees

“ We’ve repatriated all of our short term assignees early, and allowed any long term assignees to choose whether they want to repatriate early or stay on in the host location.

“ Most people are staying where they are - but we’re making individual assessments on a case by case basis.

“ We’re making sure our assignees are aware of the existing support services available to them.

“ We are treating our mobile employees the same as local employees as much as possible and is reasonable.

“ We’ve been proactively reaching out to find out about our people’s wellbeing. For some people we are taking a decision to extend their assignment if they are happy to continue and for others, who do not want to stay, we are arranging for them to return home.

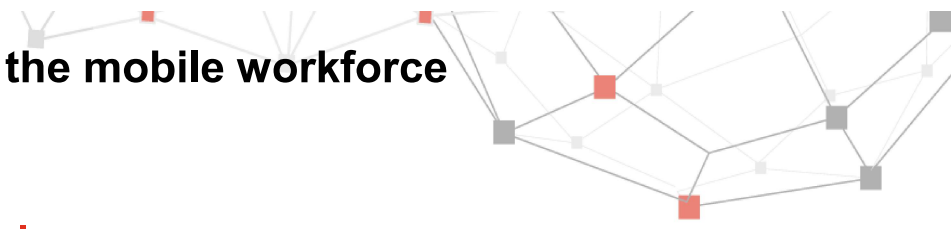
“ We’ve identified a number of people who have chosen to move, particularly within Europe. They assumed they would be able to work in the alternative location but in some cases, there is a significant cost impact which we are having to work through.

“ Flexible work arrangements are in place, but we’re not offering any additional financial assistance.

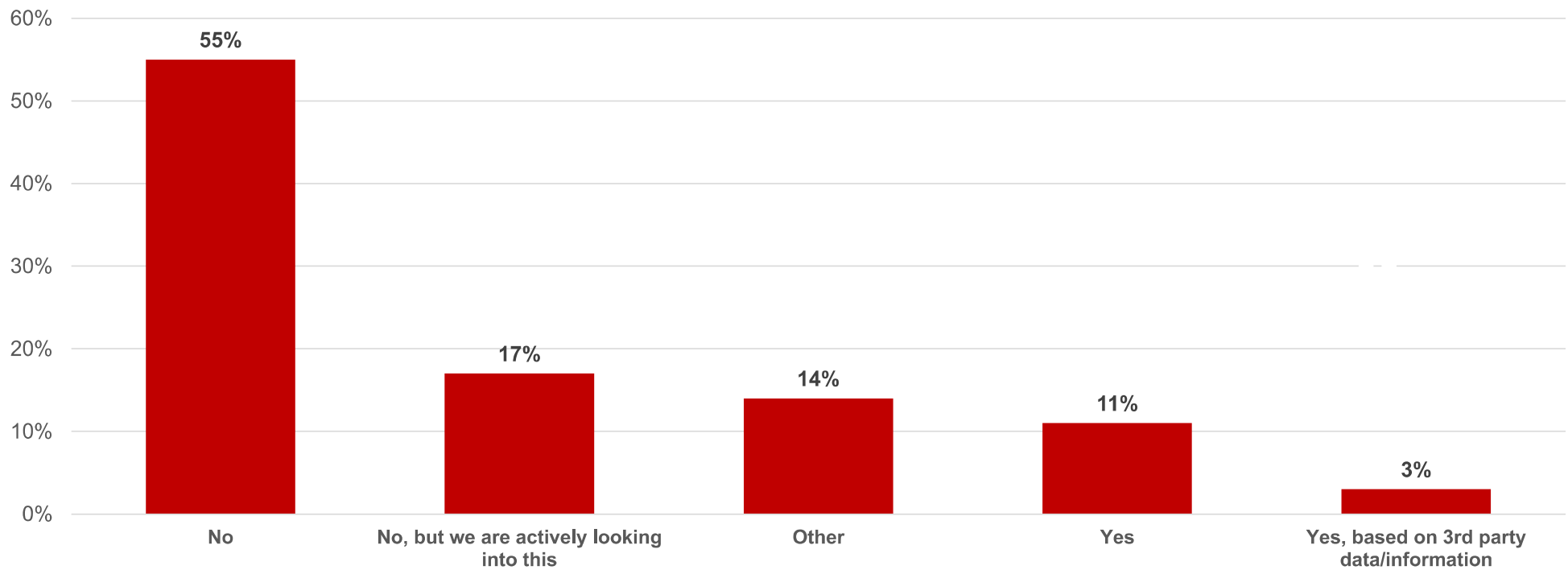
“ Our assignees have all remained in their host location. However, we’re finding that employees who are not on assignment have moved their work location to another country or State – and some are stuck somewhere.

3.2 | COVID-19: The impact for Global Mobility and the mobile workforce

Current international moves



Are you providing additional cash support to your mobile employees (e.g. to cover higher cost of living, disruption or the cost of unexpected travel)?



3.2 | COVID-19: The impact for Global Mobility and the mobile workforce

Current international moves



Sharing insights on support companies are providing to mobile employees:

“ We are reimbursing meals, accommodation and transportation costs for employees who have temporarily relocated to an alternative location.

“ We’re providing support for staff if they need to procure additional equipment to work effectively from home.

“ This is a matter of huge concern and we will do what we can to be reasonable.

“ We haven’t offered any additional cash payments but we are considering if additional support (from our tax provider) for tax filings might be required or whether additional tax equalization payments will be needed.

“ We’re working to make sure employees who have chosen to relocate are aware of the cost impacts – and with the business to agree principles for who will bear the costs.

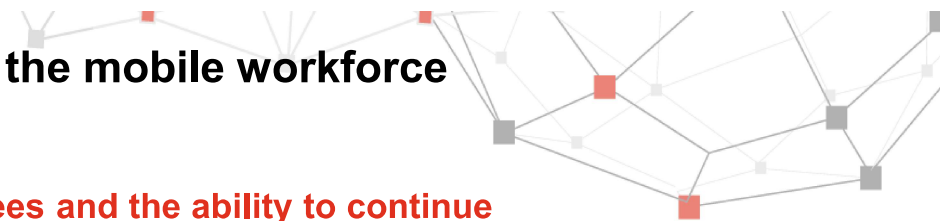
“ When it comes to providing additional support, we are evaluating on a case by case basis - but we will cover reasonable costs.

“ We’re extending support for employees who are at the start or end of their assignment, such as temporary accommodation.

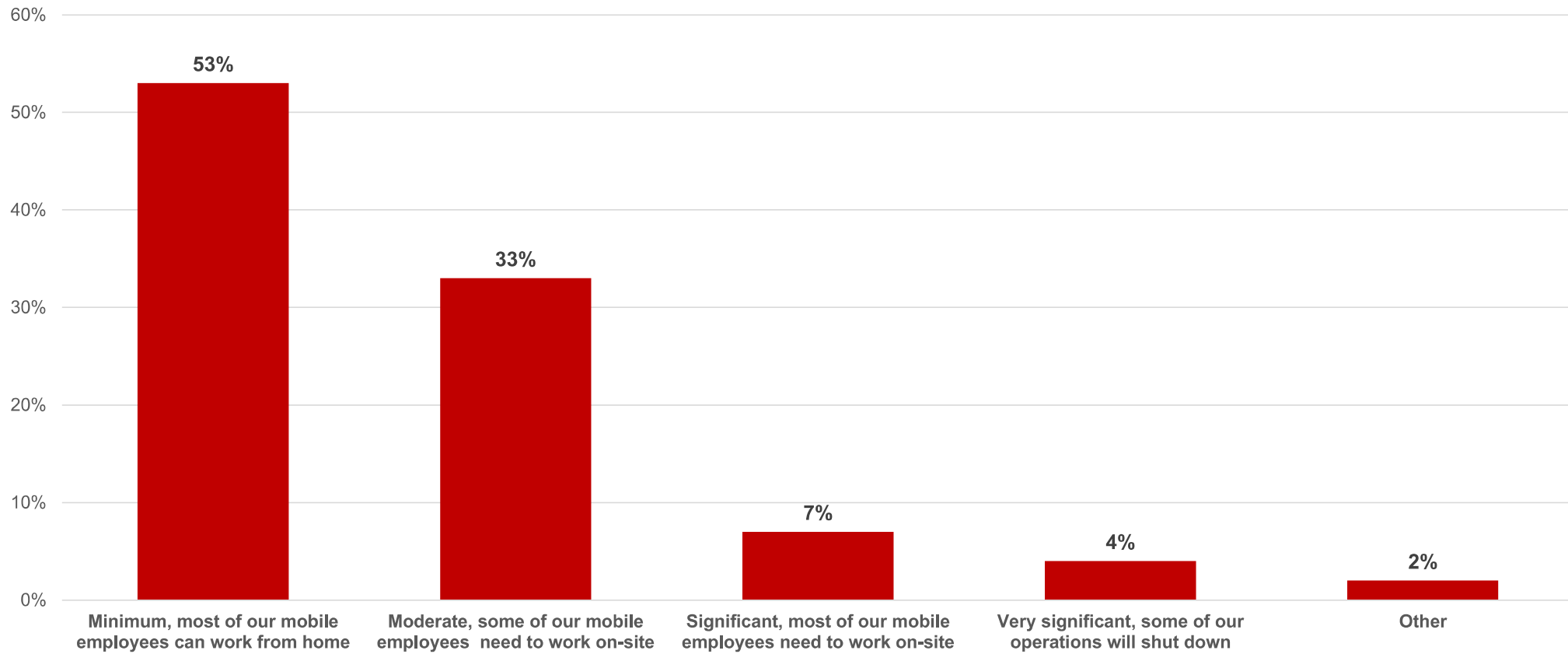
“ We’re offering return flights home and 2 weeks’ accommodation.

3.2 | COVID-19: The impact for Global Mobility and the mobile workforce

Current international moves



What is the impact of the outbreak on your mobile employees and the ability to continue business as usual?

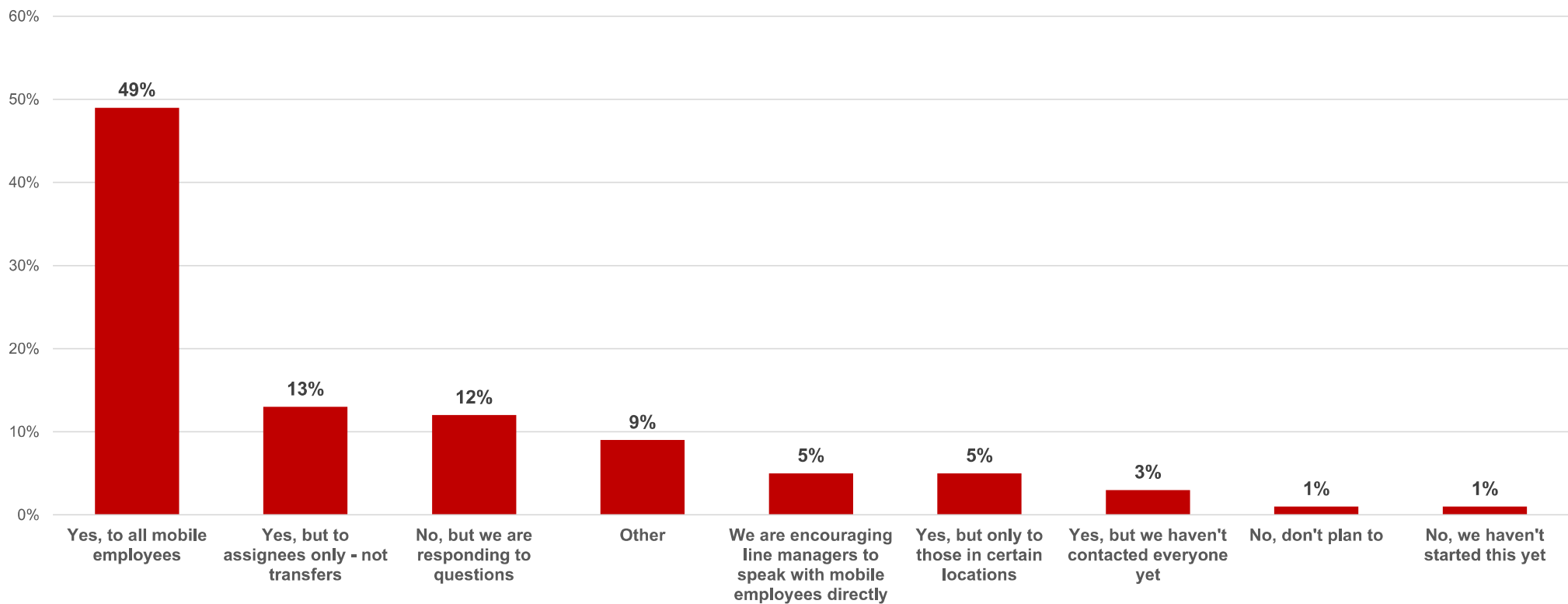


3.2 | COVID-19: The impact for Global Mobility and the mobile workforce

Current international moves

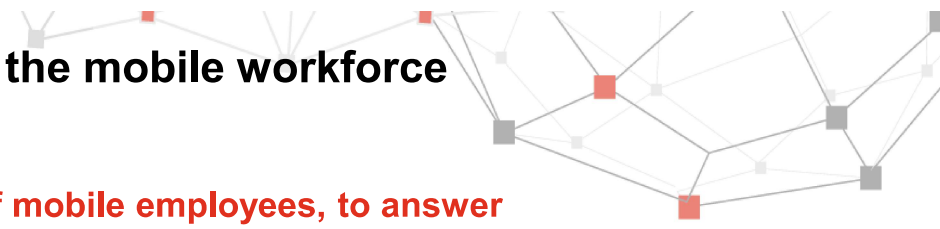


Are you proactively communicating to your mobile employees to show support and answer questions?

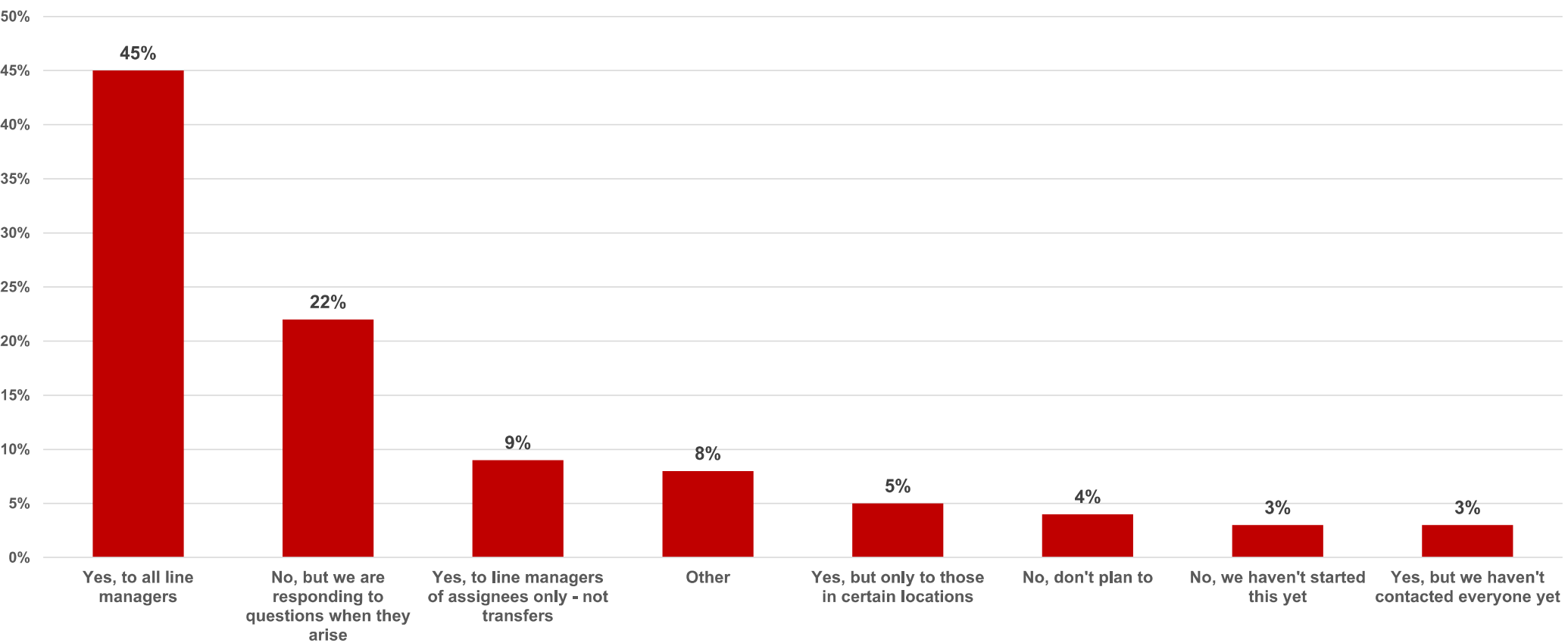


3.2 | COVID-19: The impact for Global Mobility and the mobile workforce

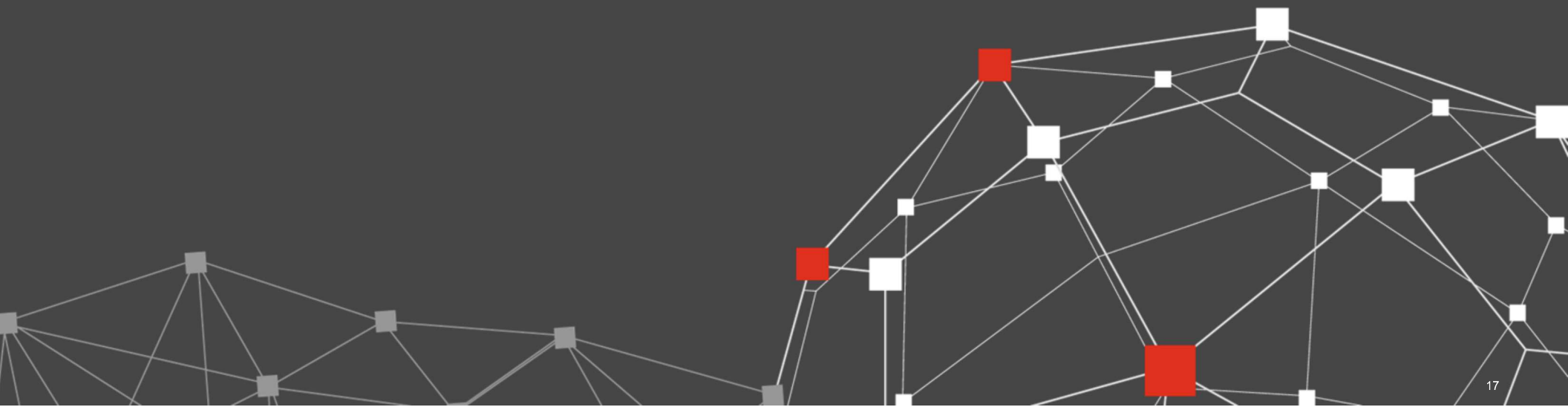
Current international moves



Are you proactively communicating to the line managers of mobile employees, to answer questions?



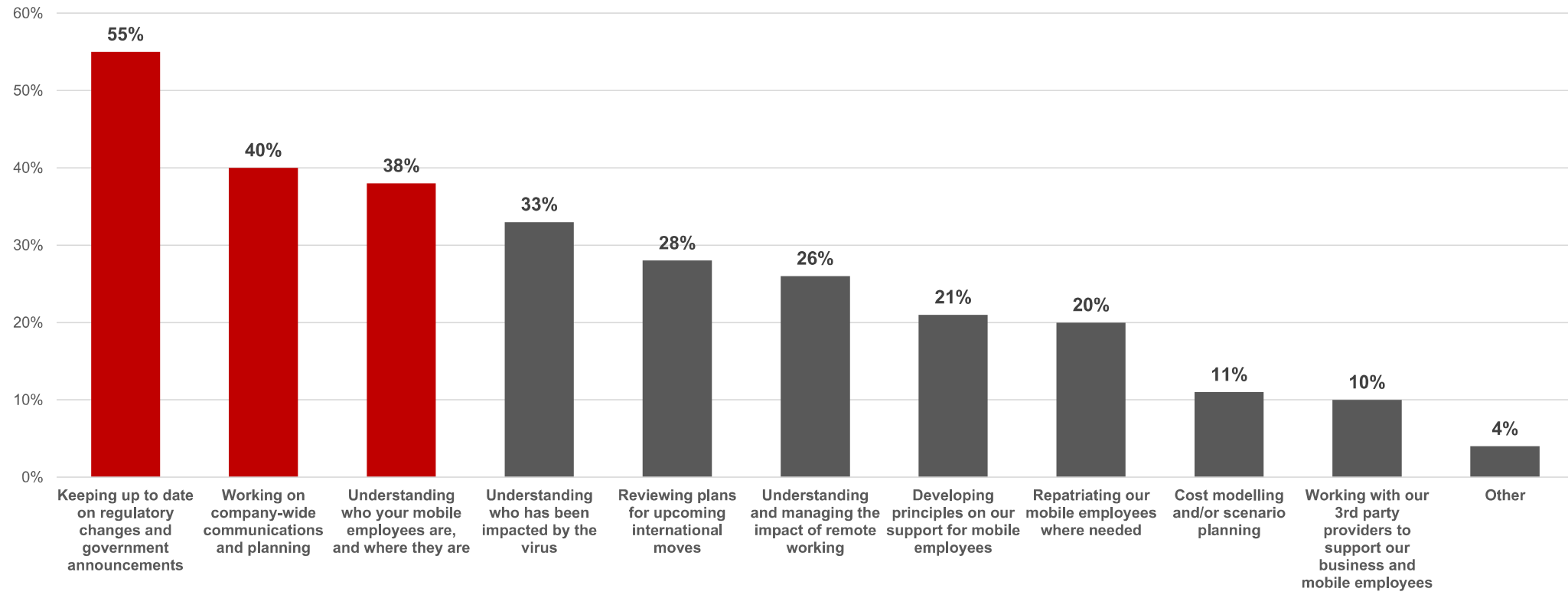
3.3 | Strategy



3.3 | COVID-19: The impact for Global Mobility and the mobile workforce Strategy

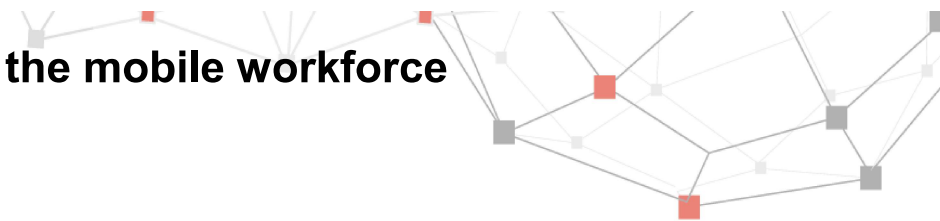


Aside from knowing your people are safe and well, what are your top three priorities relevant to your mobile workforce, globally:

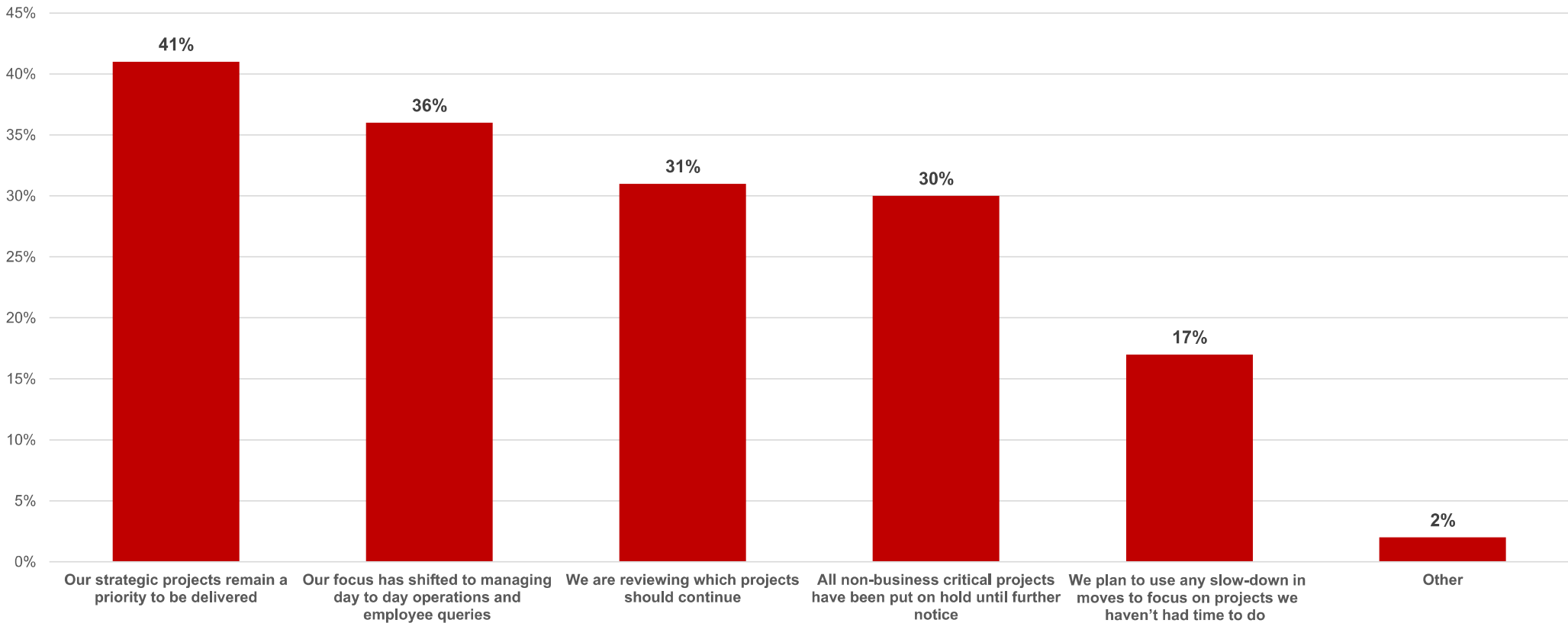


3.3 | COVID-19: The impact for Global Mobility and the mobile workforce

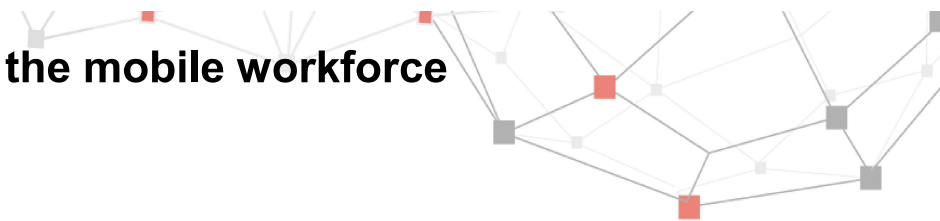
Strategy



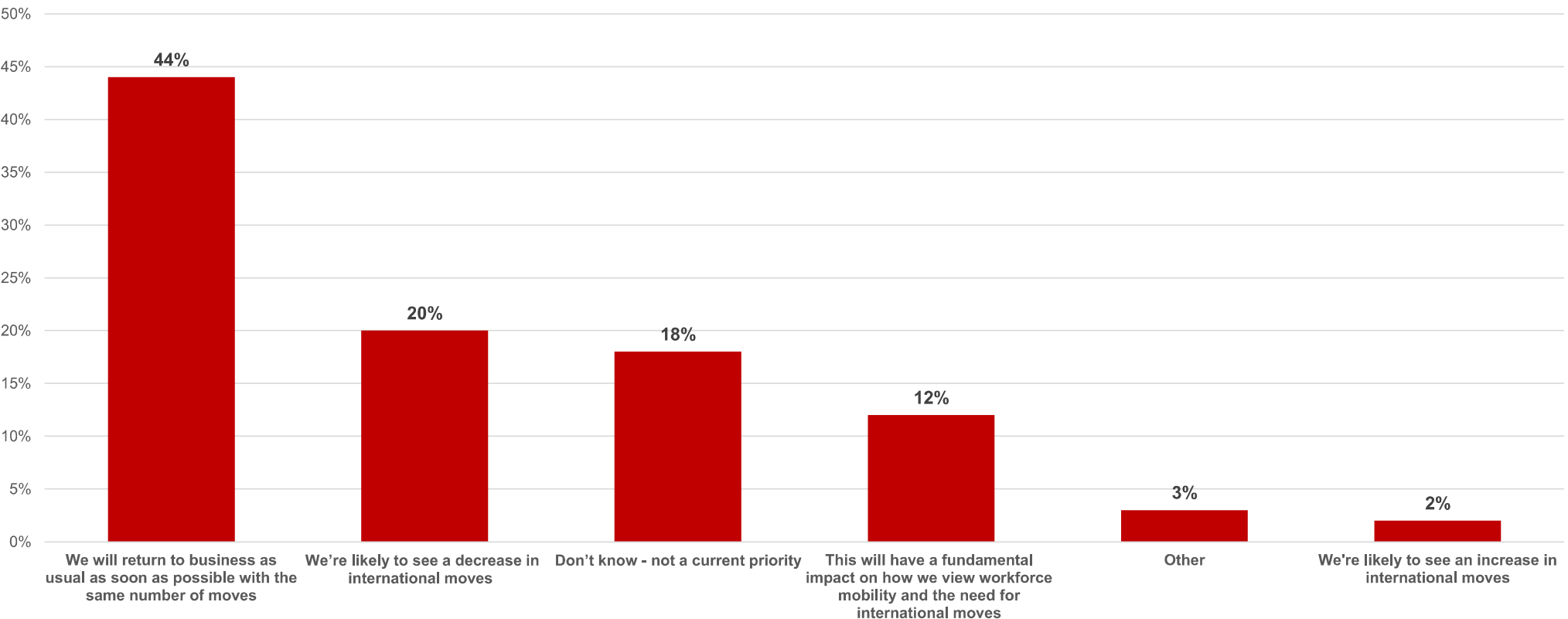
What impact are you seeing on strategic mobility priorities?



3.3 | COVID-19: The impact for Global Mobility and the mobile workforce Strategy

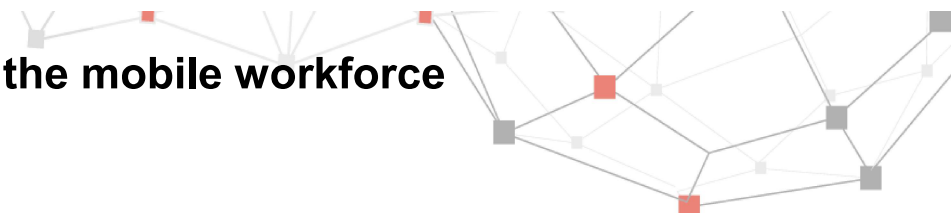


What impact do you think the outbreak will have on mobility at your company in the future?



3.3 | COVID-19: The impact for Global Mobility and the mobile workforce

Sharing insights - what's keeping people busy



““ We're working with our providers to determine how we best deal with the 'new normal' world of mobility

““ We're trying to evaluate the potential cost impacts of people returning home for a time and developing principles for how this will be handled.

““ Our mobility team are in close communication with our assignees, line managers and local HR.

““ We're not communicating in a special way to mobile employees, except where needed on a case by case basis.

““ Keeping up with immigration and travel restrictions is proving challenging.

““ We're communicating with mobile employees, line managers and assignment sponsors – but also trying to ensure we align with all-employee comms.

““ We're busy understanding insurances and healthcare coverage for our mobile employees, as well as support for medical evacuations if needed.

““ We're working closely with managers and employees to find the best solutions for upcoming moves.

““ We expect mobility will return to BAU but there will be greater scrutiny on costs going forward, so we're exploring options to address that.

““ We want to know more about the best approach to take on remote working – how do we deal with the tax implications of people working from a location that isn't their normal workplace?

““ We have some time now to speed up work on some projects, so we are ready and well placed for when travel restrictions end and mobility returns again.

““ We'd really like to know what other companies are doing from a tax perspective, where people are extending, staying in locations or find themselves 'somewhere else' for a while.

““ Keeping up to date with immigration and travel restrictions, relevant to us and our employees, is proving time consuming! There are sometimes three locations involved for one person!

““ We are evaluating remote working and what we will need to change to enable more of this in the future. We are creating a framework to help us make sure all of the different aspects are considered.

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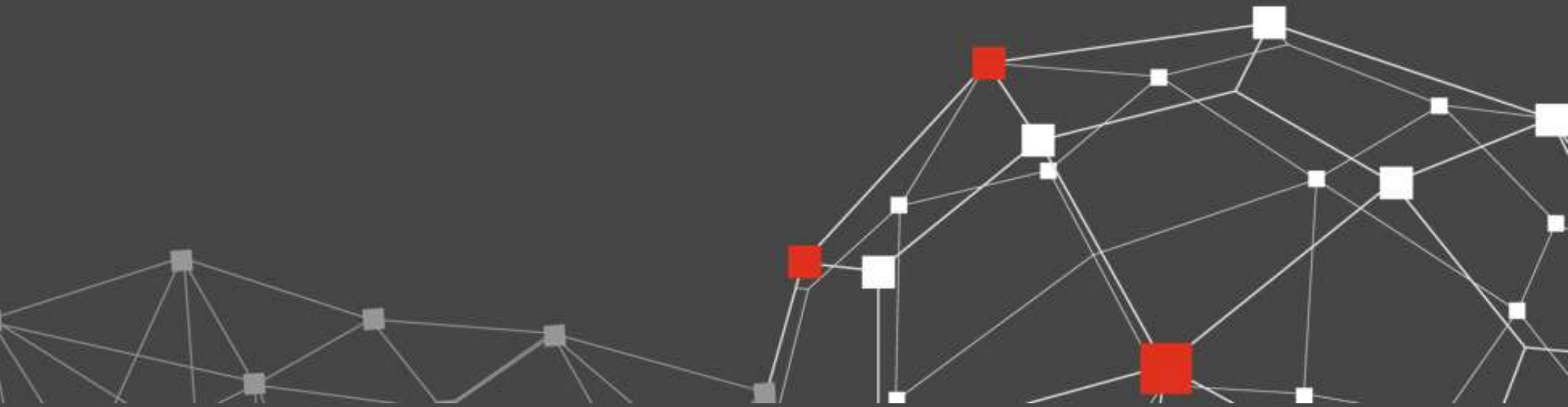


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