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

PwC Global Mobility Pulse Survey Results
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.

Thank you for taking the time to participate. We hope you find the results insightful.

Keep well and stay safe.
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Overview and respondent demographics

Overview of respondents
- 350 respondents
- 8 industry sectors
- 37 participant locations

Breakdown of industry sector
- Consumer Goods & Services: 13%
- Energy, Utilities & Mining: 11%
- Financial Services: 20%
- Government & Public sector: 2%
- Health Industries: 9%
- Industrial Products and Services: 19%
- Other: 1%
- Tech, Media & Telecoms: 13%

Breakdown of Company HQ
- North America: 35%
- Western Europe: 22%
- Asia Pacific: 17%
- Central/Eastern Europe: 12%
- UK: 10%
- Latin America: 2%
- Middle East: 1%
- Africa: 1%

Breakdown of respondent location by region
- North America: 32%
- Asia Pacific: 26%
- Western Europe: 24%
- UK: 7%
- Central/Eastern Europe: 8%
- Latin America: 2%
- Africa: 1%
- Middle East: 0%

*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.
Survey results

3.1: Planned international moves
3.2: Current international moves
3.3: Strategy
3.1 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

- Postponing new moves: Average% = 86
- Continuing to move people in new locations where possible: Average% = 63
- Cancelling upcoming moves: Average% = 50
- Enabling new moves to start in home country: Average% = 55
- Enabling new moves to start in 3rd country: Average% = 48

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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 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.

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.

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

- Temporary return home: 58%
- Early end of assignment: 43%
- No additional support being provided: 22%
- Other: 20%
- Temporary relocation to an alternative location: 14%
- Extend assignment: 3%

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

“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.”

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

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

“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.”

“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.”

Current international moves

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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)?

- 55% No
- 17% No, but we are actively looking into this
- 14% Other
- 11% Yes
- 3% Yes, based on 3rd party data/information
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Current international moves

#### Sharing insights on support companies are providing to mobile employees:

<table>
<thead>
<tr>
<th>Support Provided</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursement</td>
<td>Meals, accommodation, transportation costs for employees who have temporarily relocated to an alternative location.</td>
</tr>
<tr>
<td>Procurement</td>
<td>Support for staff if they need to procure additional equipment to work effectively from home.</td>
</tr>
<tr>
<td>Cash Payments</td>
<td>Not offered, considering additional support (from tax provider) for tax filings or additional tax equalization payments.</td>
</tr>
<tr>
<td>Case-by-case</td>
<td>Additional support evaluated on a case-by-case basis, covering reasonable costs.</td>
</tr>
<tr>
<td>Return Flights</td>
<td>Offering return flights home and 2 weeks’ accommodation.</td>
</tr>
<tr>
<td>Temporary Housing</td>
<td>Extending support for employees at the start or end of their assignment, such as temporary accommodation.</td>
</tr>
</tbody>
</table>

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

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

- Minimum, most of our mobile employees can work from home: 53%
- Moderate, some of our mobile employees need to work on-site: 33%
- Significant, most of our mobile employees need to work on-site: 7%
- Very significant, some of our operations will shut down: 4%
- Other: 2%
Are you proactively communicating to your mobile employees to show support and answer questions?

- Yes, to all mobile employees (49%)
- Yes, but to assignees only - not transfers (13%)
- No, but we are responding to questions (12%)
- Other (9%)
- We are encouraging line managers to speak with mobile employees directly (5%)
- Yes, but only to those in certain locations (5%)
- Yes, but we haven't contacted everyone yet (3%)
- No, don't plan to (1%)
- No, we haven't started this yet (1%)

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

- 45% Yes, to all line managers
- 22% No, but we are responding to questions when they arise
- 9% Yes, to line managers of assignees only - not transfers
- 8% Other
- 5% Yes, but only to those in certain locations
- 4% No, don't plan to
- 3% No, we haven't started this yet
- 3% Yes, but we haven't contacted everyone yet
Aside from knowing your people are safe and well, what are your top three priorities relevant to your mobile workforce, globally:

- Keeping up to date on regulatory changes and government announcements: 55%
- Working on company-wide communications and planning: 40%
- Understanding who your mobile employees are and where they are: 38%
- Understanding who has been impacted by the virus: 33%
- Reviewing plans for upcoming international moves: 28%
- Understanding and managing the impact of remote working: 26%
- Developing principles on our support for mobile employees: 21%
- Repatriating our mobile employees where needed: 20%
- Cost modelling and/or scenario planning: 11%
- Working with our 3rd party providers to support our business and mobile employees: 10%
- Other: 4%
What impact are you seeing on strategic mobility priorities?

- **41%** Our strategic projects remain a priority to be delivered
- **36%** Our focus has shifted to managing day to day operations and employee queries
- **31%** We are reviewing which projects should continue
- **30%** All non-business critical projects have been put on hold until further notice
- **17%** We plan to use any slow-down in moves to focus on projects we haven’t had time to do
- **2%** Other

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

- 44%: We will return to business as usual as soon as possible with the same number of moves.
- 20%: We're likely to see a decrease in international moves.
- 18%: Don't know - not a current priority.
- 12%: This will have a fundamental impact on how we view workforce mobility and the need for international moves.
- 3%: Other.
- 2%: We're likely to see an increase in international moves.

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Strategy
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Sharing insights - what’s keeping people busy

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

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 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.

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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Keeping up to date with immigration and travel restrictions is proving challenging.
For our latest insights and resources, please visit:

If you have any questions please get in touch with your regular PwC contact who will be happy to help.