



Global Mobility Forecast: Trends in risk, talent and digital

2021 report

KPMG International

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Introduction

Mobility is _____.

2020 was a year that no one could have predicted. It was the year of uncertainty and change. Life and work went virtual overnight. Our annual KPMG Global Mobility Forum conference held in late October 2020 was no different.

Our theme for the Forum was “Mobility is _____.” In these unprecedented times, global mobility is evolving and it brings a lot of change and opportunity. We wanted everyone to reflect on what mobility means to them and fill in the blank.

Throughout the three regional Forums, our KPMG professionals and guest speakers provided insights on global mobility topics themed in three streams: Mobility is Risk, Mobility is Talent, and Mobility is Digital. They engaged an

audience of close to 3,000 people in over 80 countries with polling questions and chat features. This interaction provided new insights and data on what is trending in the industry, which we’ve compiled into this report on key trends and issues facing global mobility professionals today (and tomorrow).

It is an exciting time to be a global mobility professional. I hope you enjoy our report.



Marc Burrows
Head of Global Mobility Services

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Remote working

Remote working and work from anywhere policies are the latest steps in the evolution of mobility risk.

Just as long-term, short-term and business traveler policies have become what we know as global mobility, now a huge number of people are faced with a new set of questions:

- Where is my office today?
- Who is my boss?
- Who is paying me?
- Who are my peers?

To get a grip on the challenges of leading a virtual workforce in a COVID-19 world and beyond, you need a framework to define how you categorize the types of mobility and evaluate risk.



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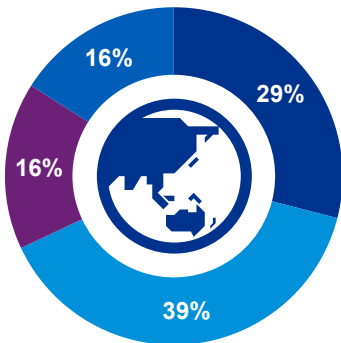


Where is the market today?

- 25–30 percent of the workforce will be working from home by 2022.
- This increase in remote work will result in significant savings for the employer though it will require significant initial investment in going digital.
- There is an expectation that the new normal will result in a reduction of traditional mobile employees.
- Many companies are still in wait and watch mode before taking next steps.

Do you expect traditional mobile employees to decrease?

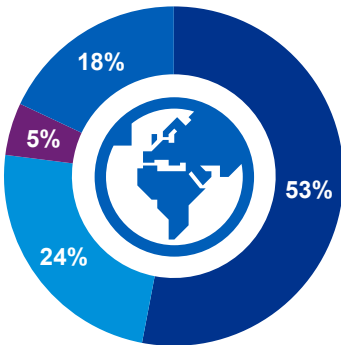
ASPAC



- Increase in remote work, less traditional assignees
- Increase in remote work, no reduction in traditional assignees
- No increase in the longer term
- We do not know what is expected yet

Source: 2020 KPMG Global Mobility Forum, KPMG International

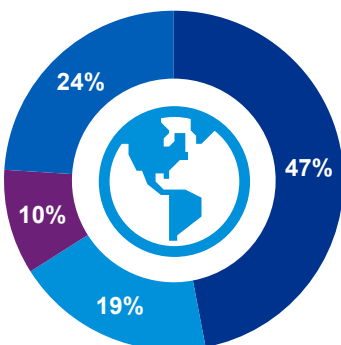
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- Increase in remote work, less traditional assignees
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Source: 2020 KPMG Global Mobility Forum, KPMG International

Americas



- Increase in remote work, less traditional assignees
- Increase in remote work, no reduction in traditional assignees
- No increase in the longer term
- We do not know what is expected yet

Source: 2020 KPMG Global Mobility Forum, KPMG International



Transitioning to the workforce of the *future present*

In reality, there are many different types of working models which could be adopted and be very effective depending on company culture.

Below, we outline some of the most popular models from the traditional model all the way through to an extreme model.

Traditional

- Main head office
- Flexibility for some

Pop-up

- Temporary offices
- Supplement to traditional set-up

Mixed

- More off-site working
- Limited to a defined population

Professional mixed

- Significant off-site working

Extreme

- Hyper virtual
- Head office is for limited activities



How to address

For companies that have decided to offer flexible work, we are broadly seeing the following steps be taken:

Risk review

- Assessing risk and compliance actions required for existing populations.
- Determining existing precedent and talent management concerns.

Decision tree approvals

For many launching work from anywhere policies, decision tree approvals apply.

Policy development

Determining long-term policy by consulting broadly across the business.

Operational rollout

Factors to consider include:

- Application to recruitment policy
- Communication strategy
- Case approval process and workflow
- Ongoing monitoring and compliance

Some of the first movers have now moved through this operational rollout stage and have their policies live.

Employee compliance

Compliance for a mobile workforce was always a challenge. Now, work from anywhere, Brexit, government subsidies and reliefs all add layers of complexity.

Mobility relies on employees being compliant.

Ensuring compliance in the beginning of the COVID-19 pandemic was important, yet secondary to employee safety. As the world adjusts to life during an ongoing pandemic, you must redefine normal and ensure that your compliance framework is fit for purpose.

How do you give your people the clarity they need to do the **right thing at the right time?**



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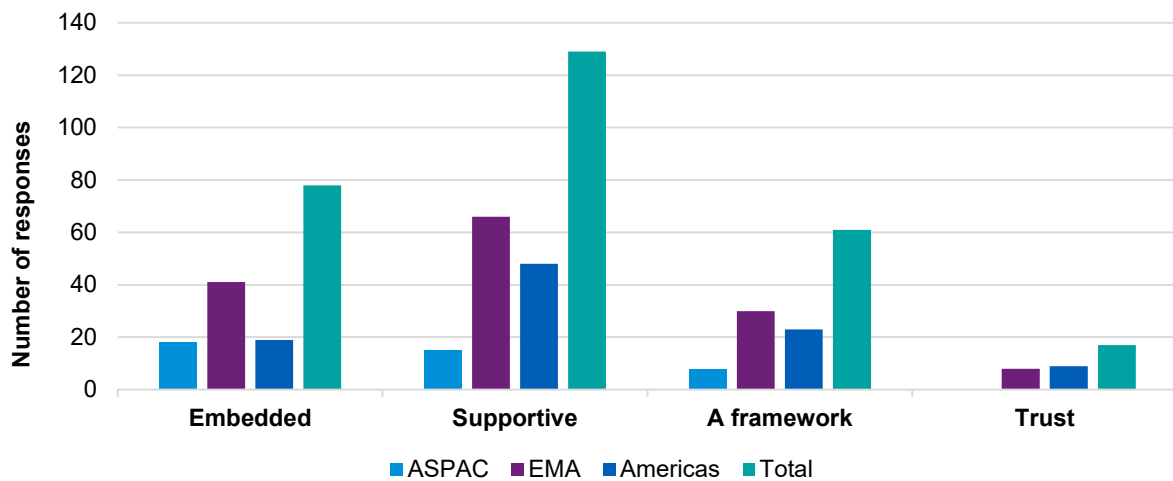
It all begins with culture

Your compliance culture determines how you can and will respond to current market challenges.

For many, compliance is a part of the fabric of the organization and the employer's involvement in employees' affairs are willingly accepted. However, it remains popular within some industries to trust employees' to manage their own affairs themselves.

The authorities increasingly hold employers responsible for many matters, notably in the areas of social security and posting of workers or where there is uncertainty of responsibility between employee and employer. Accordingly, we are witnessing a slow and steady increase of the responsibilities of the employer to manage employee compliance.

How would you best summarize employee compliance in your organization?



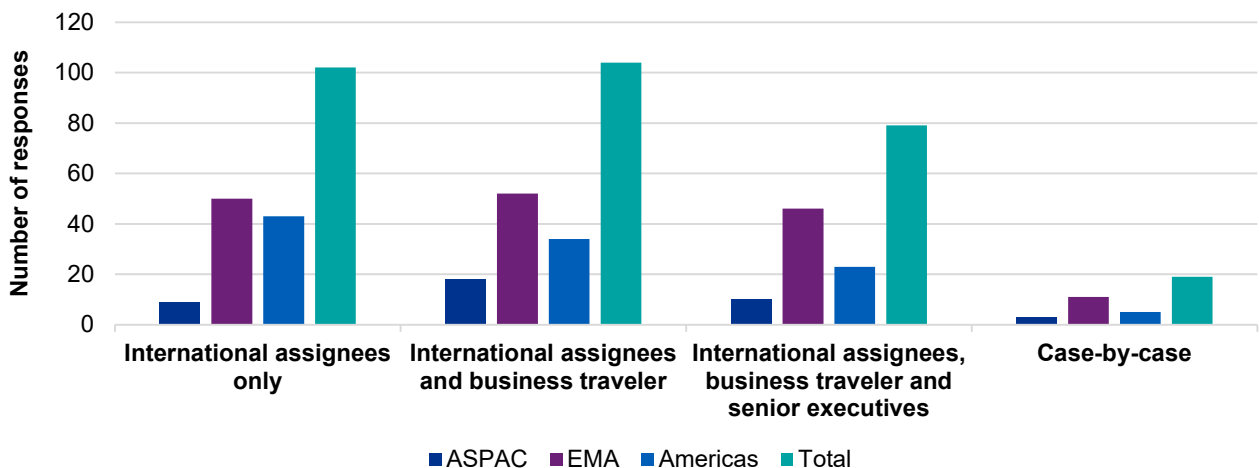
Source: 2020 KPMG Global Mobility Forum, KPMG International



New populations mean new policies

The vast majority of employers have clear policies for supporting specific groups of mobile employees. Nearly all the participants in our polling supported their assignees with many also supporting their business travelers and senior executives. The challenge now is working out where and how new groups of employees, such as those working remotely due to COVID-19 or those affected by Brexit, will fit into existing policies or, whether new procedures are required across the organization.

Who do you support with their tax compliance obligations?



Source: 2020 KPMG Global Mobility Forum, KPMG International

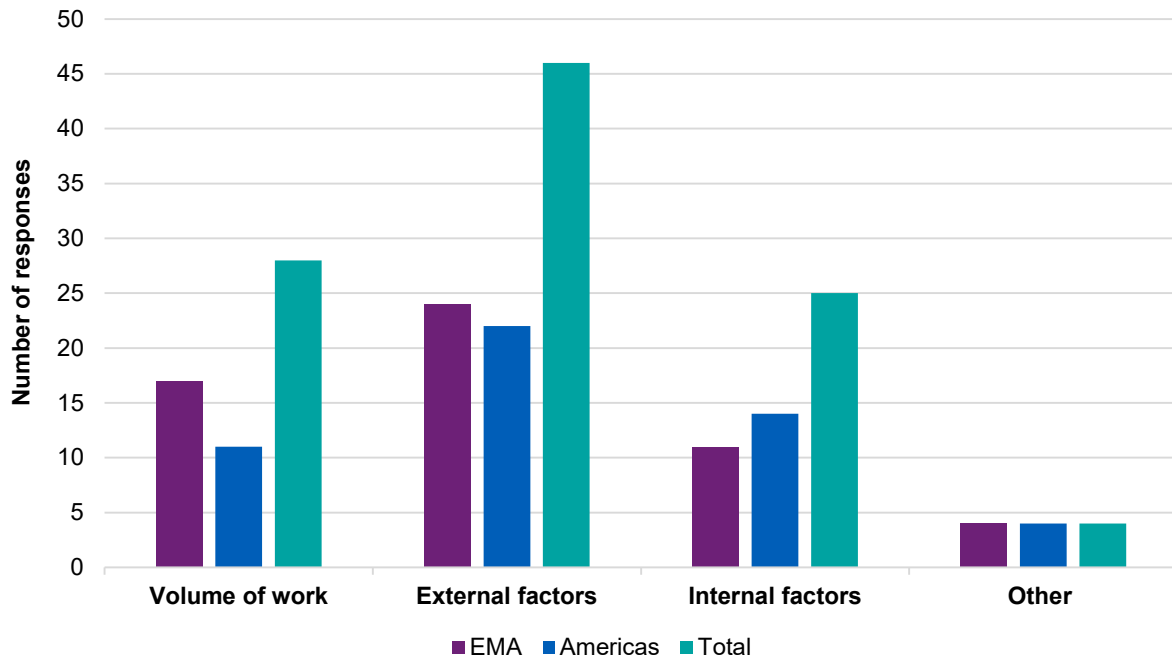


The next 12 months

No one could imagine the world as it is today 12 months ago. Looking forward the main concern for employers are external factors such as: Brexit, economic impact of COVID-19, new rules and regulations and, of course, the ongoing impact of travel restrictions.

Many employers also noted that simply the volume of work they've been left to deal with is a risk to maintaining compliance. At this time of global emergency, it is mobility professionals who find themselves at the heart of the employee compliance challenges.

What is the biggest challenge for maintaining employee compliance over the next 12 months?



Source: 2020 KPMG Global Mobility Forum, KPMG International

Corporate compliance

Many employees won't be going back to the office any time soon.

Their home or someone else's home, is their new workplace and this has complex consequences for employers.

- How do those employers make sure they fulfill their duty of care obligations?
- What kind of corporate culture can they create?
- And what does it mean for transfer pricing and permanent establishment?



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Duty of care

An employer's duty of care is both an expectation of the employee and an obligation enshrined in regulation.

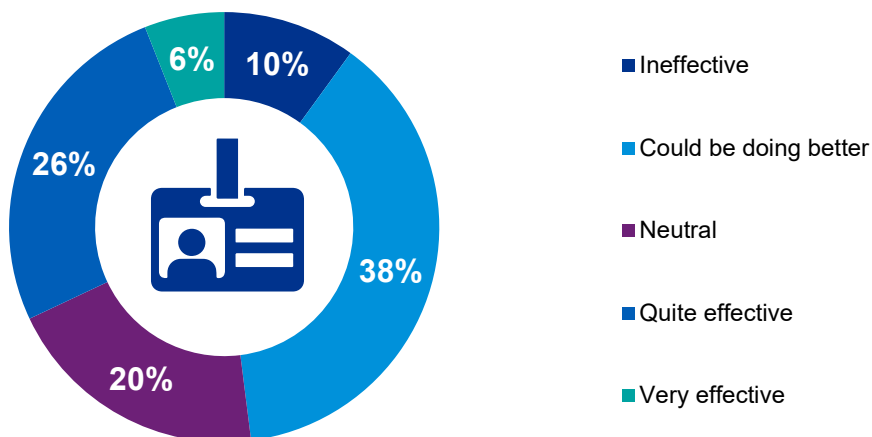
Globally, employers find a complex and ever-changing tapestry of regulation reflecting deep cultural instincts but also the prevailing political winds in a country/jurisdiction.

The conventional office-based workforce presented manageable risks in a relatively easily controlled environment. But a workforce that's working from home, on-the-go, or across international borders presents far more challenges.

World Mental Health Day on 10 October 2020 shone the spotlight on the psychological effects of prolonged periods of absence from the office environment and colleagues; another critical element of the employers' duty of care to consider during these unique times.

Below, figure 1 illustrates a sample of the duty of care risks and issues employers have been experiencing during 2020 and into 2021, while the survey, conducted in our Forum session, suggests that a majority of organizations are not doing an effective job at identifying employees vulnerable to these risks.

How effective has your organization been at identifying and tracking employees that have chosen to work from outside their country/jurisdiction of employment?



Source: 2020 KPMG Global Mobility Forum, KPMG International

Figure 1:



Corporate culture: brand and employee engagement

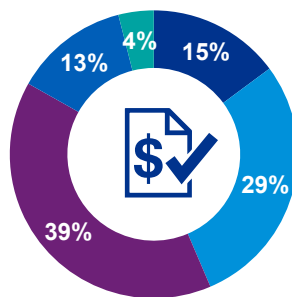
As a company becomes more global, it takes on greater tax compliance risks: cross-border issues are more complex, exposure and reporting obligations increase, and the OECDs BEPS Actions mean that taxing authorities have more data on big companies than ever before.

Yet, in 2020 we saw more judicious consumers, a more discerning and demanding workforce, and the real existential threat from the power held by social media.

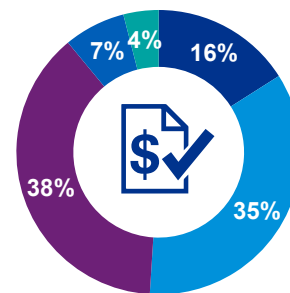
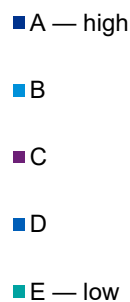
A company's brand and reputation are two of its most valuable assets making the importance of maintaining compliance as high as the stakes if it is not.

Grade how well your organization is doing at managing the following work from anywhere risks:

Payroll withholding and reporting



Permanent establishment and transfer pricing



Source: 2020 KPMG Global Mobility Forum, KPMG International

Permanent establishment, transfer pricing, tax immigration and payroll risks

It is somewhat paradoxical that despite the absence of a physical relocation from virtual assignments, the breadth and complexity of the issues involved can be much greater.

- Virtual assignments are set to become a permanent part of a company's suite of workforce planning options.
- Location of employees, their activities, intra-group contracting, transfer pricing and permanent establishment risk will all take on greater emphasis than with traditional mobility.
- Good virtual mobility policies and processes are essential to adapt to these new aspects of mobility issues.
- Global Mobility teams that are well integrated with HR, Reward, Finance, and Tax will prove invaluable in providing the most creative and compliant solutions to the workforce planning questions of the future.



Targeted rewards

What kind of reward will allow you to attract and keep the very best people?

Paying them lots of money isn't enough — you need to **find out what they value the most.**

With the global workforce experiencing unprecedented disruption and flexibility, the most talented individuals have different expectations of their employers.

- More tailored packages that improve their work-life balance.
- More support in areas like wellness and mental health.
- More commitment to Environmental, Social and Corporate Governance (ESG) considerations and other ethical standards.



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Discover

Remote working is the future, but — is your reward strategy future ready?

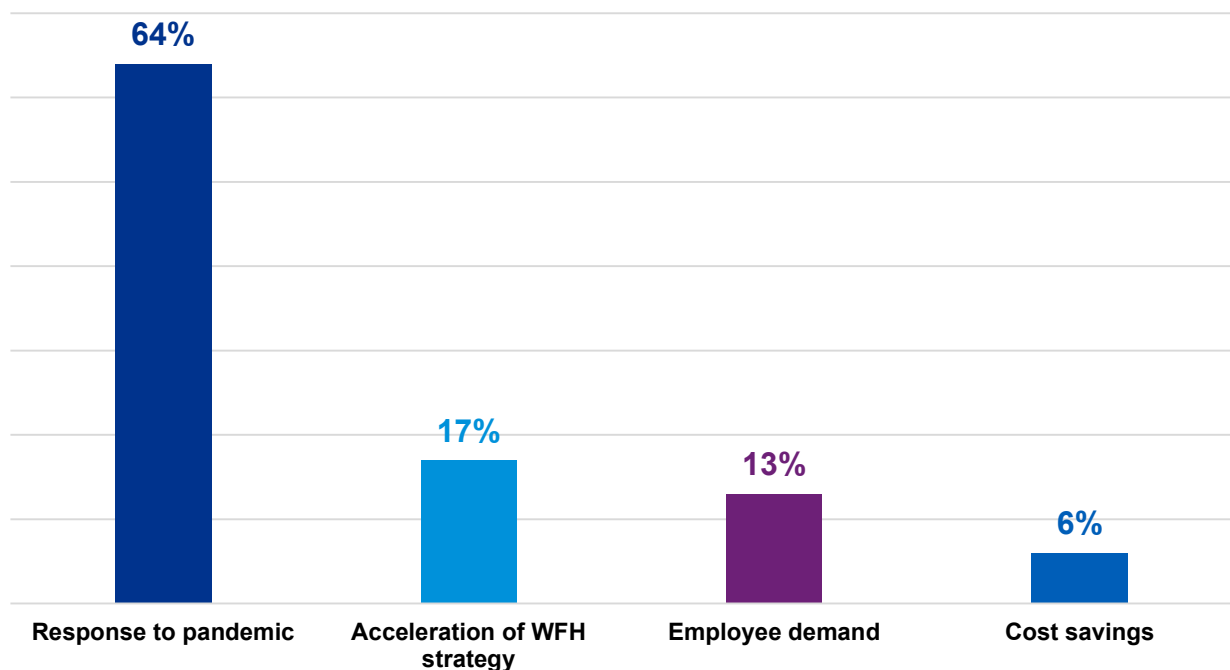
Our poll below shows that 64 percent of our respondents believe the current key factor for continuing work from home arrangements is in response to the pandemic. However, as we move forward we expect this trend to change and for employers to focus on remote working as not only a reaction to increased employee demand but also to accelerate their work from anywhere strategy which has become necessary to compete for talent. So what does this mean for your reward strategy?

The first step is to understand what you have today so you can map out what you require for the future. Reward needs to be part of the strategic workforce plan and as such, shouldn't be treated in silo — it's part of the holistic employee experience and is a vital component of how employers are going to attract and retain the talent they need as part of business recovery and the future.

Examples of questions employers should ask themselves on this road to discovery are:

- Does remote working support strategic imperatives?
- What are the tax, legal and regulatory implications?
- Does the current reward and benefits strategy support employees in the new environment?
- Does our business have the internal processes to support the virtual workforce and reward environment?

What are your organization's key factors for continuing work from home (WFH) arrangements?



Source: 2020 KPMG Global Mobility Forum, KPMG International



Define

What does a reward strategy look like for remote working?

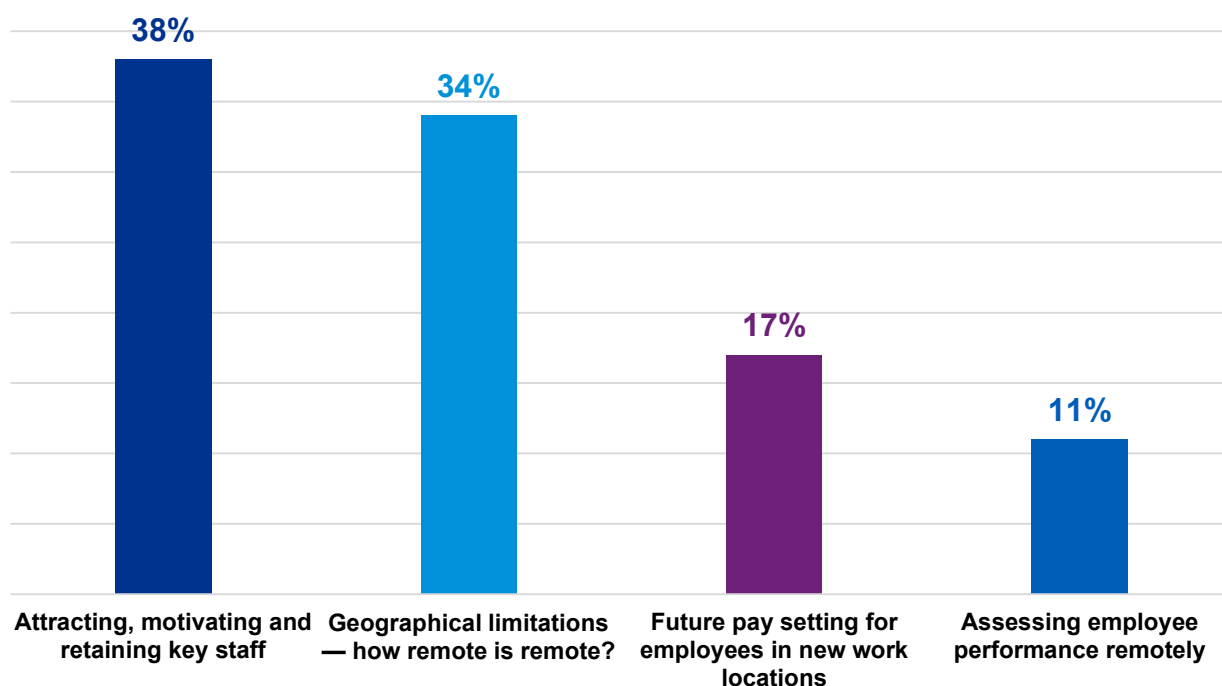
Reward is personal and is going to look very different depending on your industry and locations of your workforce. Our poll below shows that the concerns for rewarding remote working are varied, with the majority of respondents concerned about employee recruiting and retention and, how remote is remote.

Defining a refreshed reward strategy will be driven by understanding the strategic direction of the business, what competitors are doing and, most importantly, consultation with employees.

Examples of key areas to define are:

- How appropriate is your pay-setting methodology?
- What are your geographical limitations — national or international workforce?
- Are your benefits supporting the new needs of your employees — physically, mentally and financially?
- How will you engage with your people in terms of performance, skills development or team-working?
- How can you adapt your remote workforce reward strategy to meet your ESG agenda?

In terms of rewarding your employees, what concerns you the most about remote working?



Source: 2020 KPMG Global Mobility Forum, KPMG International



Design

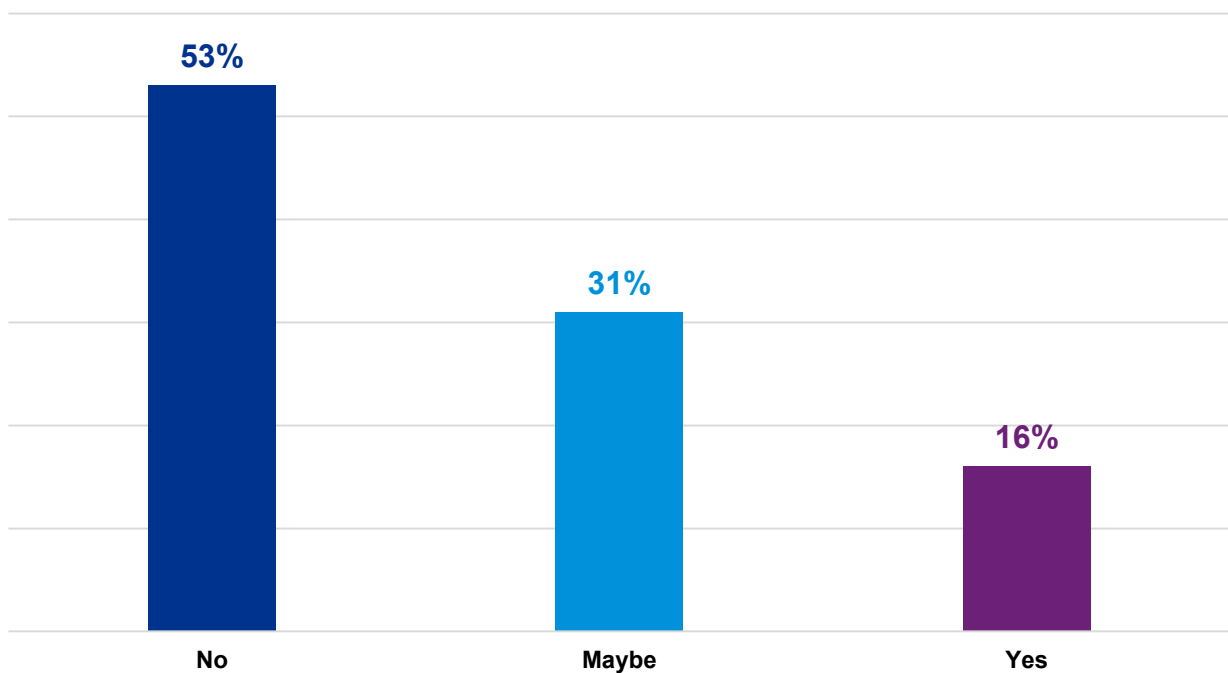
The focus of reward design for the future is flexibility, innovation and sustainability.

We must recognize that we cannot simply return to pre-pandemic reward assumptions and working practices. This means rather than bouncing back, we should be thinking about bouncing forward to make sure that we innovate to align the needs of employees, businesses and society. The majority of our respondents agree that a return to the office environment of old is unlikely, so now is the time to redesign to meet the needs of this new flexible workforce.

Examples of key areas to be addressed in respect of redesigning your reward strategy are as follows:

- Develop salary levels across remote working locations
- Determine flexible, employee choice benefits program
- Re-align performance conditions for incentives and consider extending the eligibility to all employees
- Invest in enhancing the remote work employee experience through access to innovation tools.

If the pandemic ended tomorrow, would you expect employees to return to the office full time?



Source: 2020 KPMG Global Mobility Forum, KPMG International

Employee experience

Gone are the days when careers were seen as moving up a proverbial ladder.

Career planning now and in the future is not only about moving up, but across. More importantly it's about the employee's experience.

Throw in remote working and we now need to navigate career paths virtually. Global mobility has always been able to support career progression and employee experience but how does this change in the new world?

Keeping your key talent supported and fulfilled is crucial to ensuring you get the most out of your best people. It's duty of care. With the global workforce facing disruption, isolation, anxiety and uncertainty, you need an approach to ensuring your employees feel their careers, and their wellbeing, are genuinely supported.



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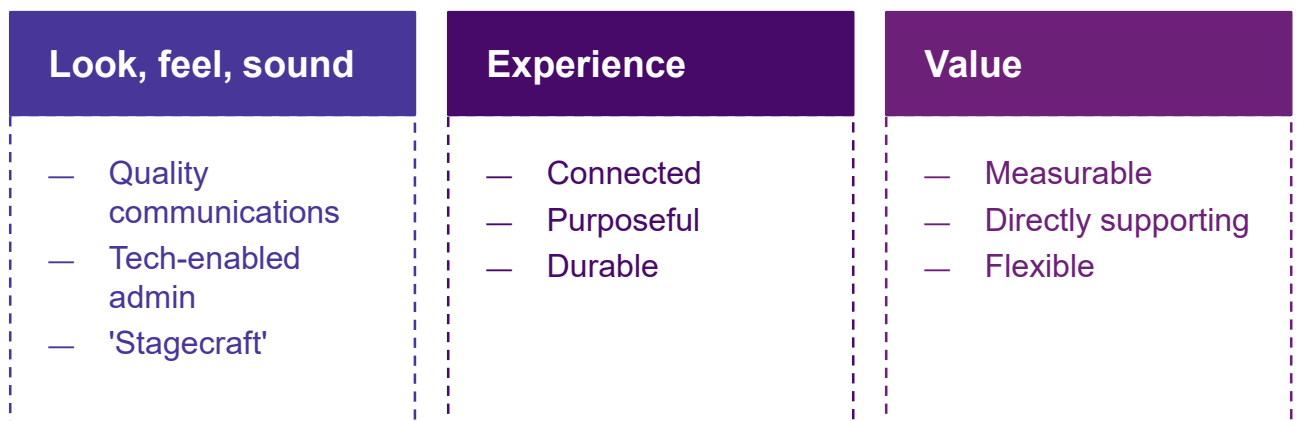
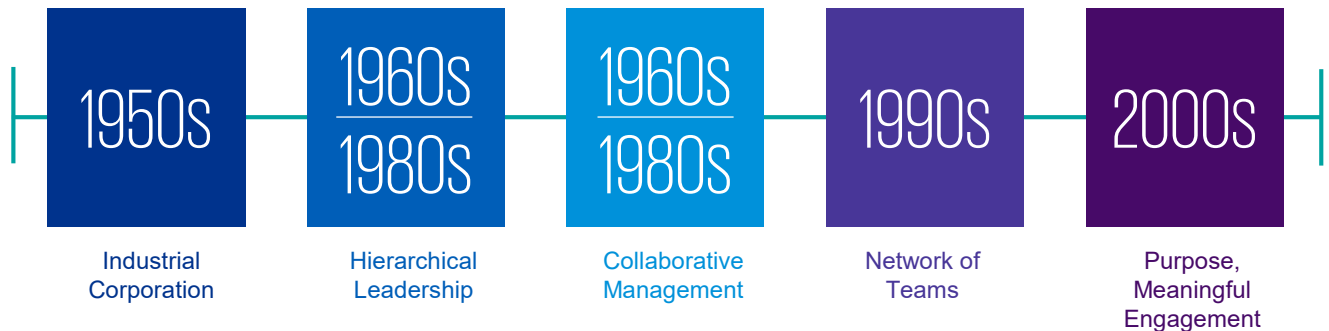
The employee experience philosophy

The employee experience philosophy focuses on the workplace as an experience. It combines several disciplines such as public relations and marketing with human resources.

Employee expectations change over time, with employees in the past focusing more on utility and compensation for their work and, nowadays, are looking at how it feels to work for the organization.

The challenge for global mobility professionals is to remain part of the strategic conversation and be relevant to an employee experience philosophy.

The employee experience



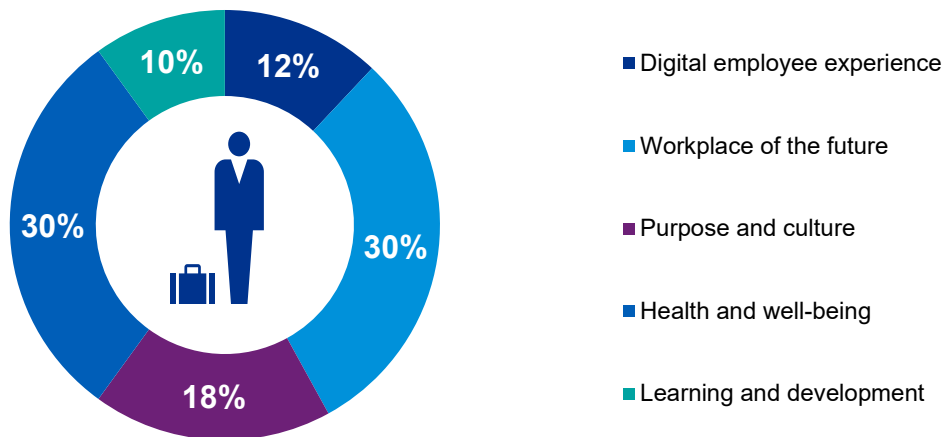


Employee health and well-being is crucial

In the current environment, unsurprisingly, employee health and well-being is top of mind for most participants in terms of their employee experience agenda over the next 12 months.

Again, global mobility has a key role to play in terms of ensuring that employees are well supported while on assignment.

What are your organization's employee experience focus areas?



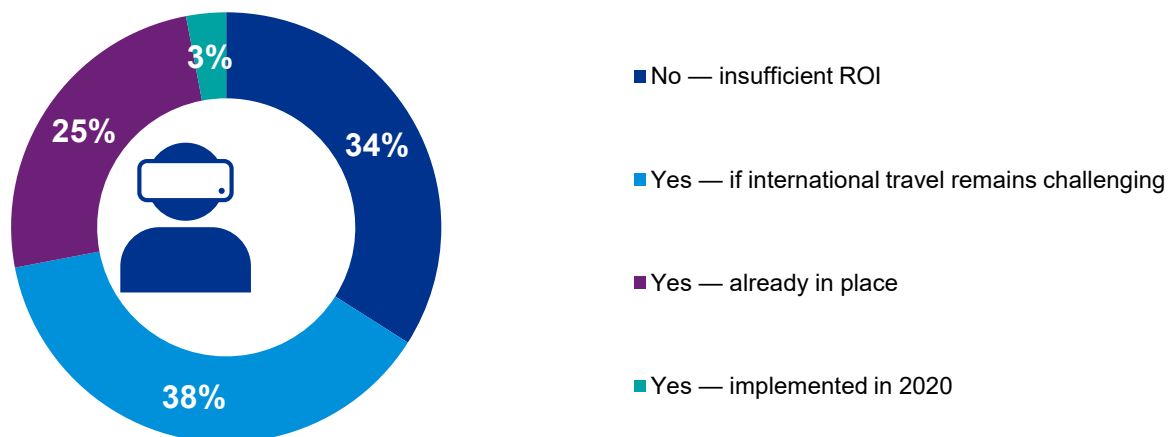
Source: 2020 KPMG Global Mobility Forum, KPMG International



Is virtual assignment an option for me?

With international travel restrictions in place, to retain the advantages of a globally mobile workforce, many organizations are considering virtual assignments if international movement continues to remain challenging. Some organizations have already started virtual assignments and a smaller number of employers would not consider this as there is a perception that there is a lower return on investment.

Is your organization considering virtual assignments?



Source: 2020 KPMG Global Mobility Forum, KPMG International

Immigration

Immigration is key to attracting top talent.

You need to know you can get the best person for the job no matter where in the world they are from. Is COVID-19 making that harder to do?

Border closures, quarantines, lockdowns. These are facts of life today and a return to certainty seems a long way off.

Getting the right people into the right roles in the right location is suddenly much trickier and fraught with risk. At the same time, the work from anywhere mindset is, in many cases, rendering geographical borders seemingly irrelevant.

What is the right approach to getting who you want?



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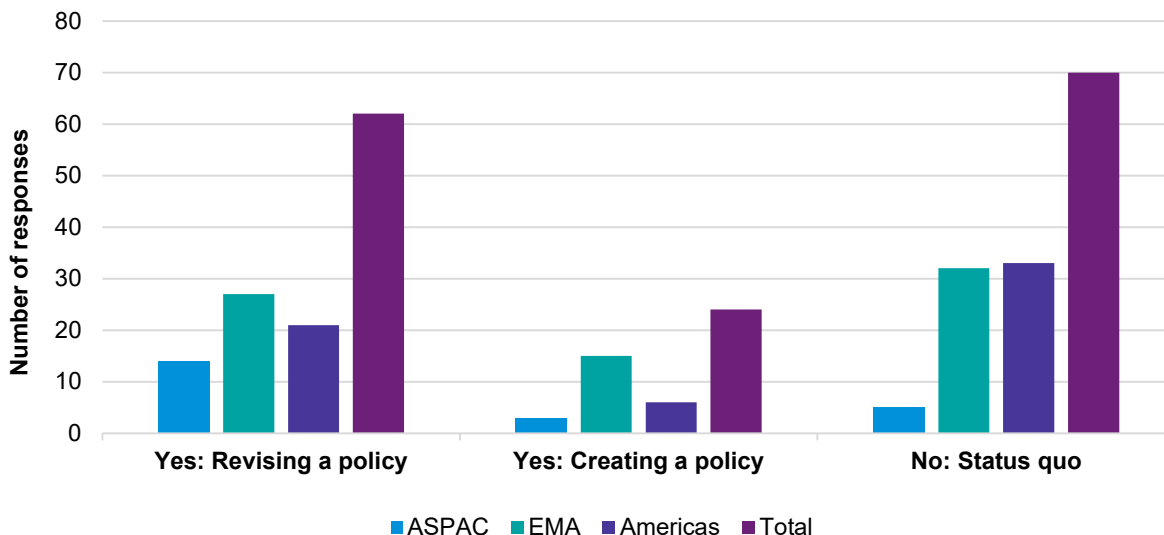


Talent is top of mind

The sudden closure of global borders, rapid changes to immigration policies and the introduction of new health measures has had a massive impact on the ability of multinational corporations to mobilize foreign talent to meet critical business needs.

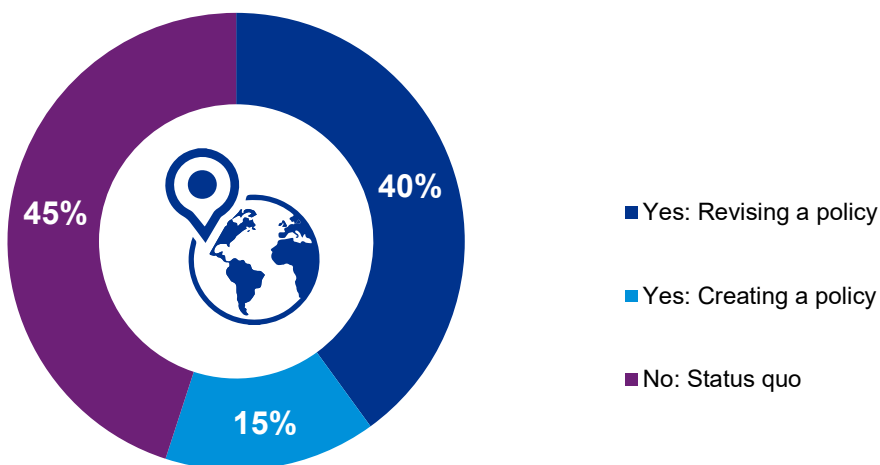
Not surprisingly, talent has emerged as a leading concern for global executives and organizations are actively either creating new immigration-related mobility policies or amending existing mobility policies to address the impact of the pandemic on their cross-border assignment and business traveler strategies.

Will your future approach to immigration policy design change based on your experience during COVID-19?



Source: 2020 KPMG Global Mobility Forum, KPMG International

Total global breakdown of future approach to immigration policy design change based on experience during COVID-19.



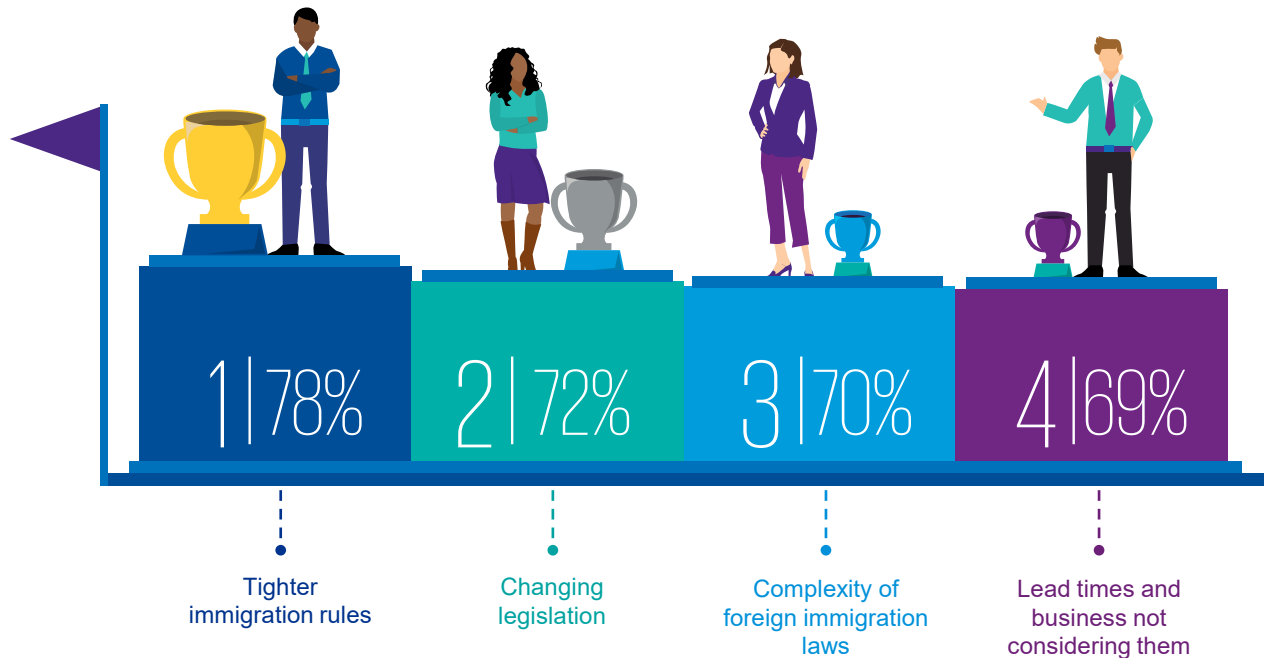
Source: 2020 KPMG Global Mobility Forum, KPMG International



Compliance is key

The emerging trend of remote work and work from anywhere policies present solutions to the current limitations of moving talent across borders but also present potential immigration, tax and employment law considerations. It is critical for stakeholders to ensure that all liabilities are assessed and factored into any work from anywhere policies prior to implementation.

Global mobility professionals rank the top immigration challenges as:



Source: 2020 Global Assignment Policies and Practices survey, KPMG International, 2020.



Regional strategies

Immigration policies around the world have differing tones based on the local perception of the importance to economic growth, innovation and diversity. As new workforce models continue to emerge including international remote work arrangements, multinational companies may need to make strategic decisions on where to deliver services given the accessibility of foreign talent and the ability to transition to permanent residence status.

Maintaining control

Pre-pandemic, most employers managed mobile employees such as traditional assignees and business travelers through a combination of robust policies and processes and technology.

COVID-19 added a new dimension to mobility not previously considered by most mobility teams — remote workers.

Because of the pandemic, enhancing existing processes and technology solutions to both track and approve employees' whereabouts is a necessity to maintain control.

Employee whereabouts is top of mind for all business leaders like never before. Global mobility professionals need to ensure compliance and control are part of the overall strategy going forward.



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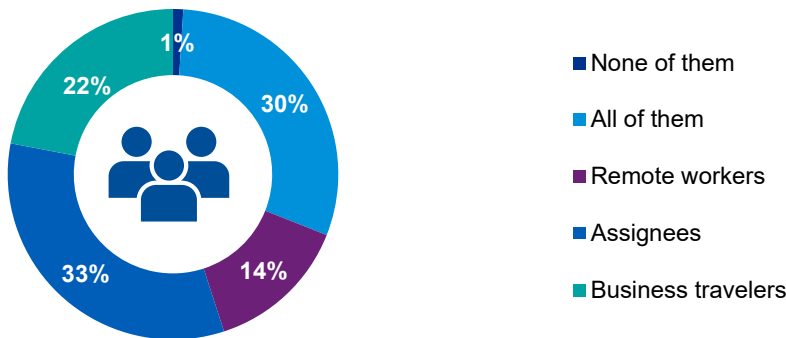
Have I tracked the right type of employees?

There is now a basic expectation and an obligation for employers to have the ability to track employees' whereabouts, so that they can be looked after, and the company's obligations can be met.

The pandemic, and the resulting risks to employee welfare and the acceleration and proliferation of diverse and flexible working arrangements were sighted as the overwhelming drivers behind this expectation.

The threat of global tax authorities focused on revenue collection to address sovereign debt should also not be discounted.

Which employee populations do you track?



Source: 2020 KPMG Global Mobility Forum, KPMG International

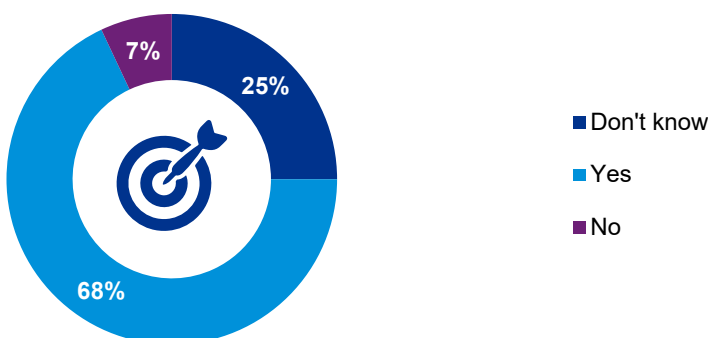


Mobility management: a quick scan

Mobility management:

- 1. Request:** Enable either the employee or their business unit to submit a mobility request.
- 2. Define policy:** Assess the request for evaluation based on the mobility type: assignee, business traveler or remote worker.
- 3. Evaluate:** Approvals granted based on company policy guidelines and regulatory risk.
- 4. Approve:** Approvals may be automated but will include escalation for manual review.
- 5. Initiate:** Initiate the actions required (e.g. relocation, payroll, tax compliance, immigration, tracking).
- 6. Monitor and Control:** Case management, including updates and renewals.

Have you increased the focus on tracking employee populations?



Source: 2020 KPMG Global Mobility Forum, KPMG International



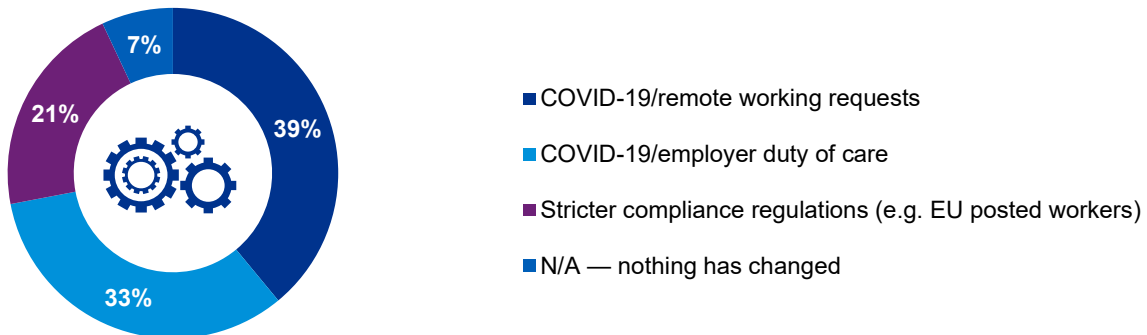
What should I do next?

In order to maintain something, you need to have it in the first place.

The world has changed, prior to COVID-19 some companies might have thought they had a handle on their mobile employees — assignees, business travelers and commuters. However, now there's a whole new population to try and control.

Technology will become a key building block for compliance of mobile employees. Coupled with supporting processes, these two will keep you in control while ensuring compliance and duty of care.

What has been the driver for the change in focus?



Source: 2020 KPMG Global Mobility Forum, KPMG International

Connected and secure

Technology has played a crucial role in keeping the global economy afloat during COVID-19.

But are you doing everything you can to make sure your data — and your people's right to privacy — is safe?

We're more globally connected than ever before, and digital communication platforms have allowed us to stay in constant touch during the pandemic.

Mobility is no stranger to remote-working innovations, and some businesses will make virtual meetings their new normal.

That's why it's never been more important to safeguard your data.



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The lines are getting blurry

When polled, all three regions felt strongly that the lines are blurring between professional and personal when working remotely. There has been a shift from work-life balance to work-life integration with the transition to working remotely during the COVID-19 pandemic.

Companies should consider the following when supporting their remote workforce:

- providing a safe environment for their teams to work from
- ensuring that there is support for their key stakeholders
- staying connected with their teams (no matter where they are).

This shift from on-site to remote working may seem blurred for now, but it is likely here to stay. Many businesses are considering adopting a virtual environment for their workforce in order to retain talent, cut costs and improve productivity.

While technology can be useful where you have remote workers, the fusing of private and work life can make the use of technology a risk.



Find a balanced approach

Finding a balance between maintaining compliance, ensuring privacy and bringing people back to the office safely will be important. Companies need to continuously be mindful of rules and regulations, such as Global Data Protection Regulation (GDPR), while also ensuring that they are keeping their employees welfare top of mind. Employers have recently found that they have had to collect personal data to ensure their employees are comfortable coming back to the office.



Stay agile to meet the new normal

Local authorities are figuring out where to draw the line on the data privacy for employees and companies. Boundaries are moving. The need to stay agile to be able to respond to legislation as it evolves will be required to meet the new normal.

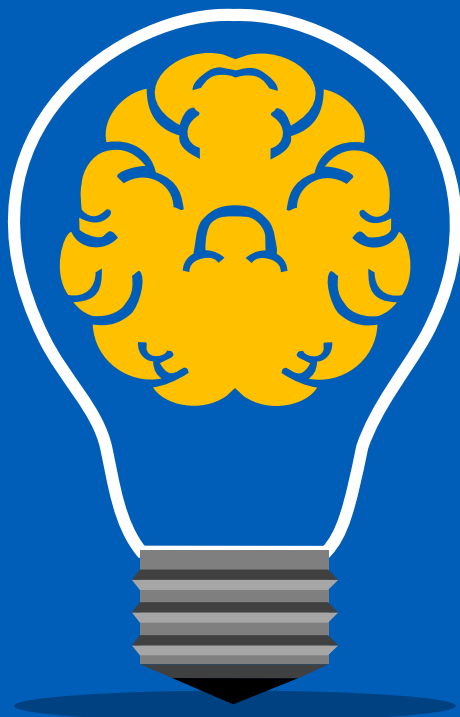
Employers must consider whether the processing of personal data is indeed necessary. If so, should such personal data be collected for specified, explicit and legitimate purposes, it is imperative that the data is not processed in a manner that is incompatible with those purposes and are adequate, relevant and limited to what is necessary for those purposes.

Employers should also consider appropriate retention periods for personal data collected and processed as part of the measures taken to combat COVID-19.

Discovering insights

Data can tell us a story about how mobility is changing — but only if you have the right analytics.

In the disrupted and fast-changing world of today, in which the global workforce has become largely virtual and certainties shift daily, it's even harder to pull out the insights you need. Data and predictive analytics are the key to reshaping your data into clear and compelling stories that help you understand the past, present and possible futures of your mobility program.



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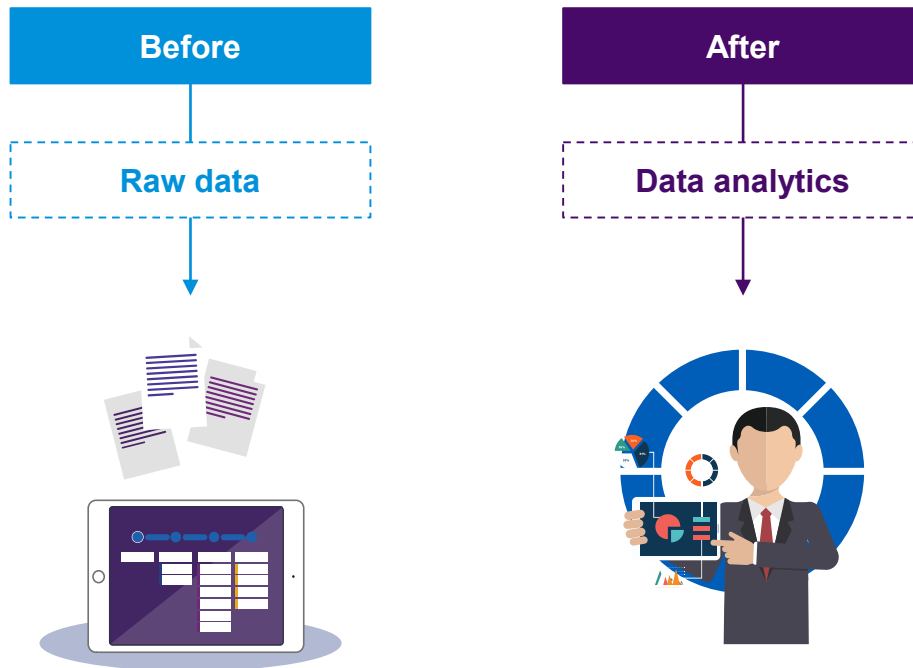


Access to data analytics is democratizing

Businesses need to feel confident they are making the right decisions.

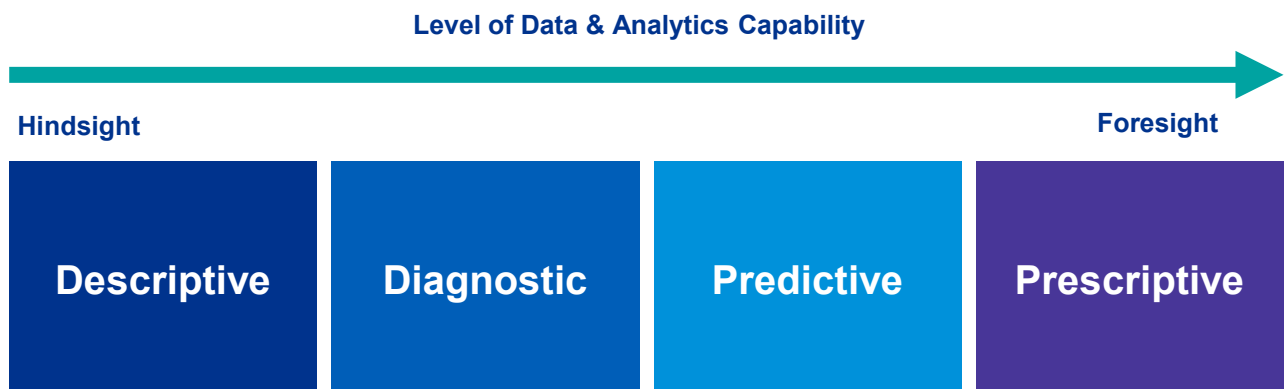
That means knowing that the data, reporting and analytics to make those decisions can be trusted. It also means understanding and managing the emerging trends and opportunities that data and analytics provide insight into.

Technology underpins the most influential organizations in the world. It enables the biggest business decisions and connects people around the globe. Data is the common thread that connects technology and businesspeople together, and analytics is the method by which data is transformed into insights that help businesses take action and generate enhanced value.



New tools have revolutionized the ability for analytics to become part of our every day. These tools are democratizing access to data analytics and increasing our speed of delivery. Mobility teams will need to build tools quickly to address specific questions and shape efficient process.

As mobility programs work through the stages of data analytics they move from trusted data visualizations to analytics that can support policy design and implementation.





More disciplines, more value

Further to a workshop which brought together expertise from corporate tax, transfer pricing, indirect tax, legal and of course, global mobility professionals, we identified the corporate deductibility of share income as a potential area for savings.

Working together, an initial hypothesis for where savings might be realized, was brought to fruition as data from multiple years allowed effort to be directed to savings – offering the best return on investment.



The example above illustrates the potential corporate income tax savings available to a company should they modify the current recharge methodology applied to their equity compensation.

Source: KPMG Data Visualization Library, October 2020

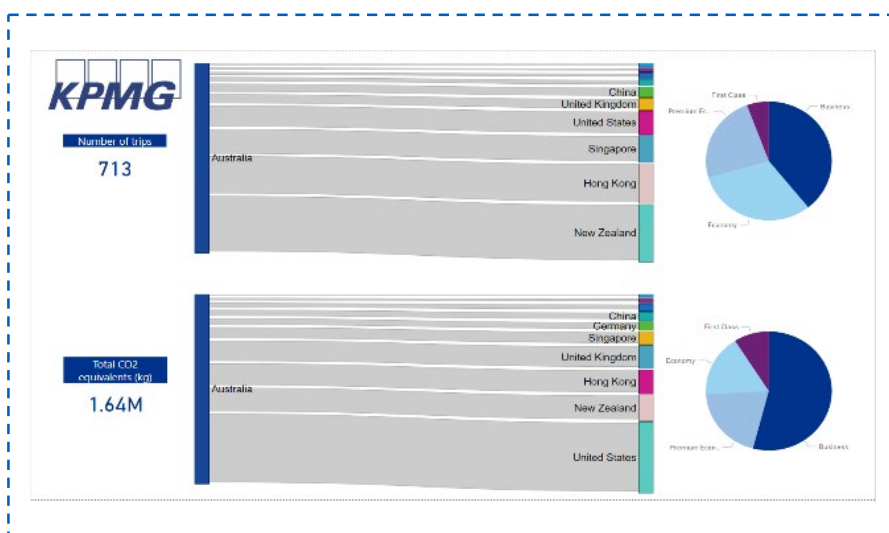


Insights can inform policy that reward positive behaviors

Data suggests companies with clear corporate social responsibility values are more profitable and better at retaining long-term staff.

By overlaying business traveler data with information from external sources we can understand current carbon emissions.

Through predictive analytics it is possible to create and test an incentive program to encourage employees to give up entitlement to higher grade flights to drive lower carbon emissions for business travel.



The example above highlights the disproportionate relationship between class of flight and carbon emissions.

Source: KPMG Data Visualization Library, October 2020



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