COVID-19 Exclusive Survey: Get inspired & rethink your International Mobility Strategy

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MSH INTERNATIONAL
SIACI SAINT HONORE GROUP

Get inspired & rethink your International Mobility Strategy: Meet our Panelists

Stephanie Roche

Stephanie is the Head of International Mobility of the L'Oréal Group, with over 12 years of experience in that branch within the Group.

Frédéric Van Roekeghem

Frédéric headed the Minister's Office of Health and Solidarity during the 2004 health reform. Between 2004 and 2014, he headed the French National Health Insurance Fund before joining MSH as Executive Director.

Laurent Cochet

Laurent Cochet is Deputy Executive Director of MSH International. He has over 20 years experience in the international mobility field and 16 years experience in strategy and business development for MSH.

Profile of Survey Respondents:
Business sector / Size of internationally-mobile population

57 organizations responded to this survey*:

✓ Mostly large organizations (+50 mobile employees), representing various business sectors

Sector of activity

1/ Manufacturing (30%)

2/ Consumer Goods (19%)

3/ Oil & Gas & Energy Services (14%)

4/ Financial & Professional services (12%)

5/ Engineering & Construction (5%)

6/ Other: Food industry, Retail, NGOs, etc.

Size of internationally-mobile population

✓ more than 250 internationally-mobile employees (32%)

✓ between 50 and 250 internationally-mobile employees (19%)

✓ less than 50 internationally-mobile employees (49%)

survey carried out from September 4, 2020 to September 25, 2020

Profile of Survey Respondents:
Location of internationally-mobile employees

✓ Internationally-mobile employees are located in every continent, and particularly in Asia

Location of mobile employees

1/ Asia (65%), as one of the locations of internationally-mobile employees

2/ Europe (61%) "

3/ North America (35%) "

4/ Africa (33%) "

5/ Middle-East (32%) "

6/ South America (21%) "

7/ Oceania (5%) "

How do respondents see prospects for development for their business sector / their own activity by the end of 2020?

✓ **Two thirds** of the respondents anticipate a positive development for:

- their business sector (65%)

- their own activity (63%)

by the end of 2020.

How do respondents see prospects for development for their own activity by the end of 2020?

✓ **Large companies** operating in **Consumer Goods** and **Manufacturing** sectors are more optimistic

Size of internationally-mobile population

- **Between 50 and 250 mobile employees** — 91% positive development of their activity
- **More than 250 mobile employees** — 78% positive development of their activity
- **Less than 50 mobile employees** — 43% positive development of their activity

Sector of activity

- **Consumer Goods** — 91% positive development of their activity
- **Manufacturing** — 65% positive development of their activity
- **Oil & Gas, Energy, Engineering, Construction** — 45% positive development of their activity
- **Financial services** — 43% positive development of their activity

How do respondents see prospects for development for the size of their total workforce by the end of 2020?

✓ While **large companies (+50 mobile employees) have a positive view** of the development of the size of their total workforce, **smaller companies are more pessimistic**

Size of internationally-mobile population

Between 50 and 250 mobile employees	64% positive development of the size of their total workforce
More than 250 mobile employees	56% positive development of the size of their total workforce
Less than 50 mobile employees	39% positive development of the size of their total workforce

Sector of activity

Consumer Goods	82% positive development of the size of their total workforce
Financial services	43% positive development of the size of their total workforce
Manufacturing	41% positive development of the size of their total workforce
Oil & Gas, Energy, Engineering, Construction	36% positive development of the size of their total workforce

What impact has COVID-19 had on the size of the internationally-mobile population of respondents?

- ✓ **75%** of respondents have kept all / most of their internationally-mobile workforce
- ✓ **18%** of respondents have repatriated most of their internationally-mobile workforce
- ✓ **Very few** respondents have increased (3.5%) or repatriated (3.5%) all of their internationally-mobile workforce

What impact has COVID-19 had on the size of the internationally-mobile population of respondents?

✓ Respondents who have kept all / most of their internationally-mobile workforce:

- **Between 50 and 250 mobile employees (82%)**
- **More than 250 mobile employees (78%)**
- **Less than 50 mobile employees (71%)**

- **Financial services (86%)**
- **Consumer Goods (82%)**
- **Manufacturing (82%)**
- **Oil & Gas, Energy, Engineering, Construction (45%)**

✓ Respondents who have repatriated most of their internationally-mobile workforce:

- **Oil & Gas, Energy, Engineering, Construction (45%)**
- **Manufacturing (18%)**
- **Financial services (14%)**
- **Consumer Goods (0%)**

What impact has COVID-19 had on the length of international assignments of respondents' employees?

✓ 75% of respondents have
not changed the length of international assignments

Significant trend to
- extend the length of international assignments
- not reduce the length of international assignments:

✓ **Consumer Goods / Financial services**
✓ **Over 50 internationally-mobile employees**

✓ Among the respondents who have
reduced the length of international assignments
2 categories of respondents are over-represented

Significant trend to
- reduce the length of international assignments
- not extend the length of international assignments:

✓ **Oil & Gas / Energy / Engineering / Construction**
✓ **Less than 50 internationally-mobile employees**

How will respondents manage their international mobility policy by the end of 2020?

32% are continuing with their policy of sending employees abroad as before COVID-19.

39% would be prepared - from an economic point of view - to resume their policy of sending employees abroad, but the constraints related to COVID-19 are an obstacle (visas, quarantines, restrictions on international flights etc.).

71%

24% are forced - from an economic point of view - to restrict their policy of sending employees abroad, due to the consequences of COVID-19.

5% have suspended their policy of sending employees abroad until further notice.

29%

Who would like to continue with / resume their existing international mobility policy (without current constraints)?

Sector of activity

- **Consumer Goods** (82%)
- **Manufacturing** (76%)
- **Financial Services** (57%)
- **Oil & Gas, Energy, Engineering, Construction** (45%)

Size of internationally-mobile population

- **Between 50 and 250 mobile employees** (82%)
- **More than 250 mobile employees** (72%)
- **Less than 50 mobile employees** (64%)

What new forms of international mobility could we see in the future?

35% **Shorter, more frequent stays abroad**

17.5% **Commuting (working abroad during the week and coming home at the weekend)**

17.5% **Virtual assignments (often associated with commuting)**

74%

7% No change from current situation

5% Flexible mobility periods

3.5% Longer, less frequent stays abroad

14.5% Others

Statements on International Mobility (in descending order)

In your opinion, international mobility…

1. …Is an integral part of your development strategy for 2021

Particularly for:
- Organizations with over 250 mobile employees (ranked # 1 or # 2 at 91%)
- Consumer Goods, Manufacturing sectors (ranked # 1 or # 2 at 82%)

2. …Is necessary to retain and develop talent within the company

Particularly for:
- Financial Services sector (ranked # 1 or # 2 at 100%)
- Organizations with between 50 & 250 mobile employees (ranked # 1 or # 2 at 73%)

3. …Must be supported to promote economic recovery

Particularly for:
- Organizations with less than 50 mobile employees (ranked # 1 or # 2 at 71%)
- Oil & Gas, Energy, Engineering, Construction sectors (ranked # 1 or # 2 at 82%)

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Thank you for your attention!

Your feedback, comments, questions?

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