



Reinventing the workplace
Our refreshed global survey

Why have we published this refreshed report?

After publishing our original [global return to the workplace client survey](#) in July 2020, the world saw continued rapid development of the pandemic, further impacting return to workplace plans globally. Our clients continued to be keen to understand what other clients were planning in both the short and long-term and we therefore conducted an updated survey, which closed on 6 November 2020.

In a similar vein to the original survey, our refreshed survey was carried out among multinational employers from a range of sectors, including energy, manufacturing, technology, consumer (retail and food and drink), transport, life sciences and healthcare and financial services. Half of the respondents to the survey employ over 10,000 employees globally and collectively have a presence in more than 60 countries across all continents.

Our survey and this report, alongside our original survey, gives unique insight from multinational employers on approaches to dealing with new workplace challenges and anticipated business trends.

Key findings



Timing of workplace returns – our original survey found that global employers were not generally rushing to return workers to workplaces. That trend continued in the results from our refreshed survey, with 45% of the global employers surveyed reporting that they had not realized their plans to return workers to the office within the timescales planned. In a clear majority of cases (58%), that was because remote working had been more successful than expected, meaning that the timing of return was not as critical as originally anticipated. 10% of employers surveyed had not yet reopened their workplaces.



Voluntary or compulsory return? – the trend of employers avoiding mandated workplace returns continued in our refreshed survey. The vast majority of employers (83%) executed phased returns, with returns mainly on a voluntary basis, or a mixture of voluntary and compulsory. Less than 20% of employers were requiring all employees to return to the workplace.



Demographic patterns among returners – 40% of employers reported seeing a demographic pattern in those returning to the workplace, with higher numbers of older or younger workers choosing to return.



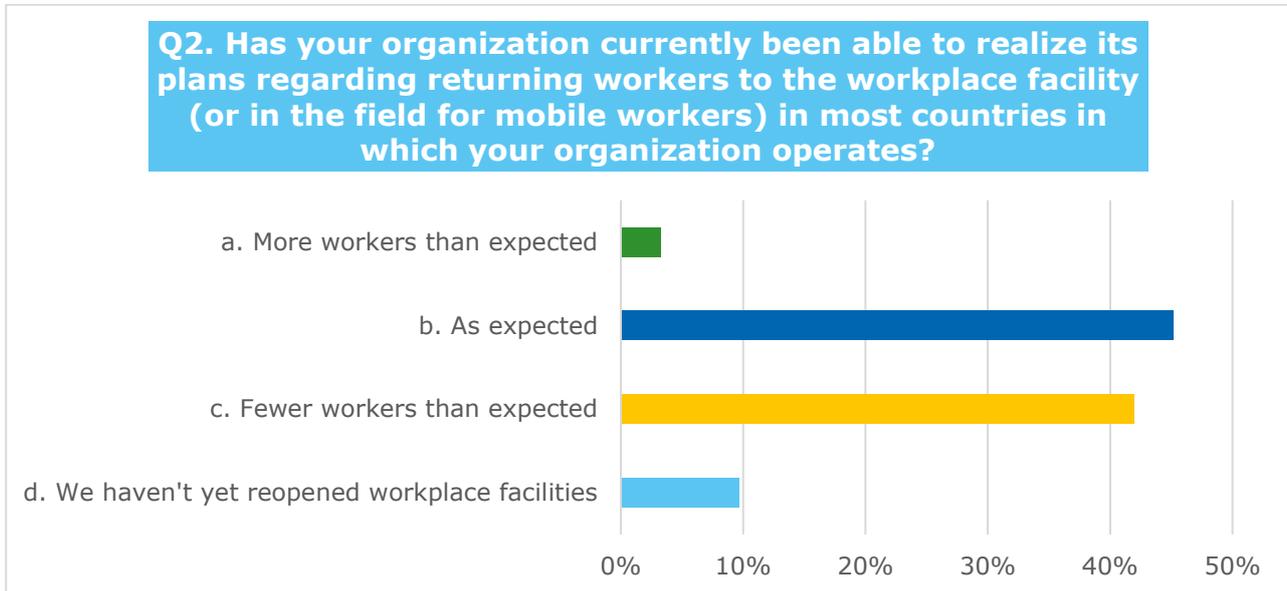
Support for remote working - we asked employers about any contingency measures they had put in place to support workers unable to work from home. Nearly 70% had availed themselves of government support, such as short-time working or furlough schemes, 40% had granted additional paid leave and the same proportion had granted additional pay or benefits.



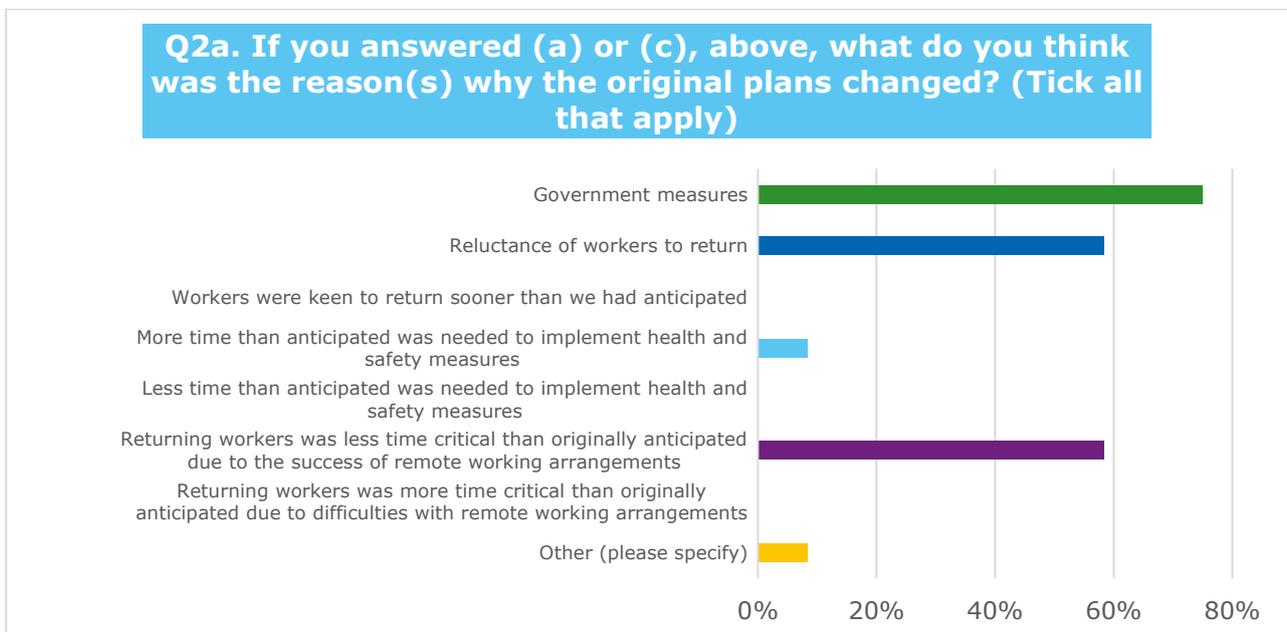
Permanent remote working? – consistent with the indications from our original survey that remote working had generally worked well for global employers, 63% of respondents reported that they would consider extending remote working on a permanent basis.

Key results in more detail

Timing of workplace returns



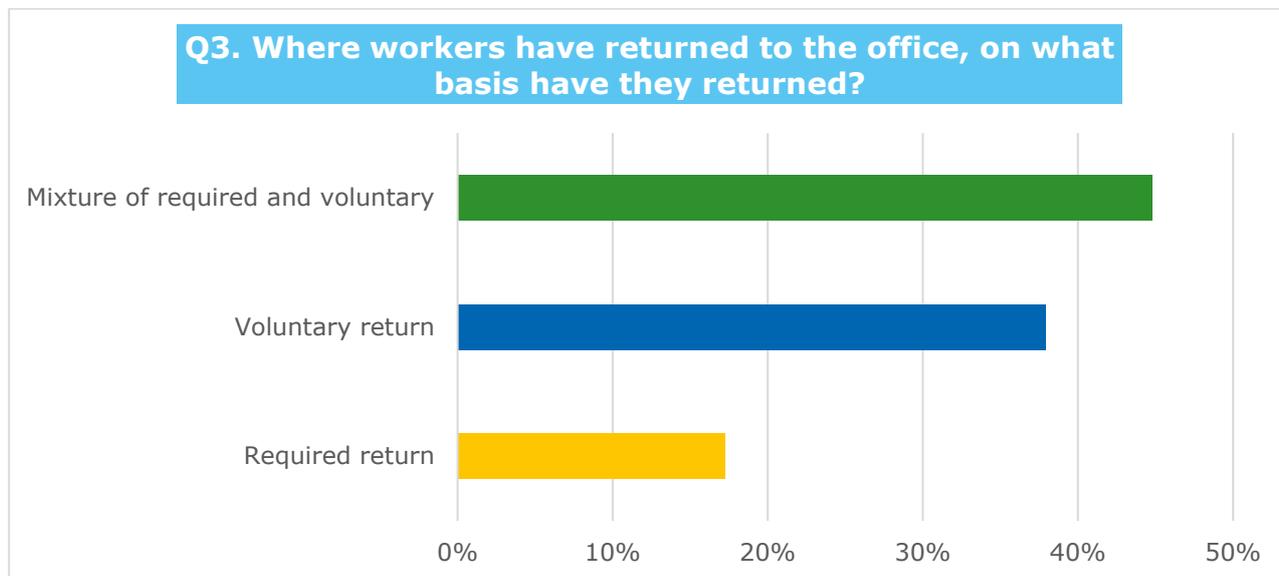
The results from our original survey indicated that the majority of respondents (54%) were planning to return workers to the workplace by early September 2020. However, at the time of our refreshed survey during October and early November 2020, only 42% of respondents reported that their organizations had managed to realize their return to workplace plans within the timescales expected. 45% reported that fewer employees had returned than expected and just 3% reported that more workers than expected had returned within the timescales originally planned. Around 10% reported not having yet reopened workplaces at all.



Unsurprisingly, 75% of respondents indicated that the reason why the original timing of planned returns had not been realized was due to government measures. However, 58% also reported factors of reluctance of employees to return and returning being less time-critical due to the success of remote working arrangements.

Many respondents also reported workplace return trends by country, with some respondents reporting fewer workers than expected returning in certain areas in Europe and the United States.

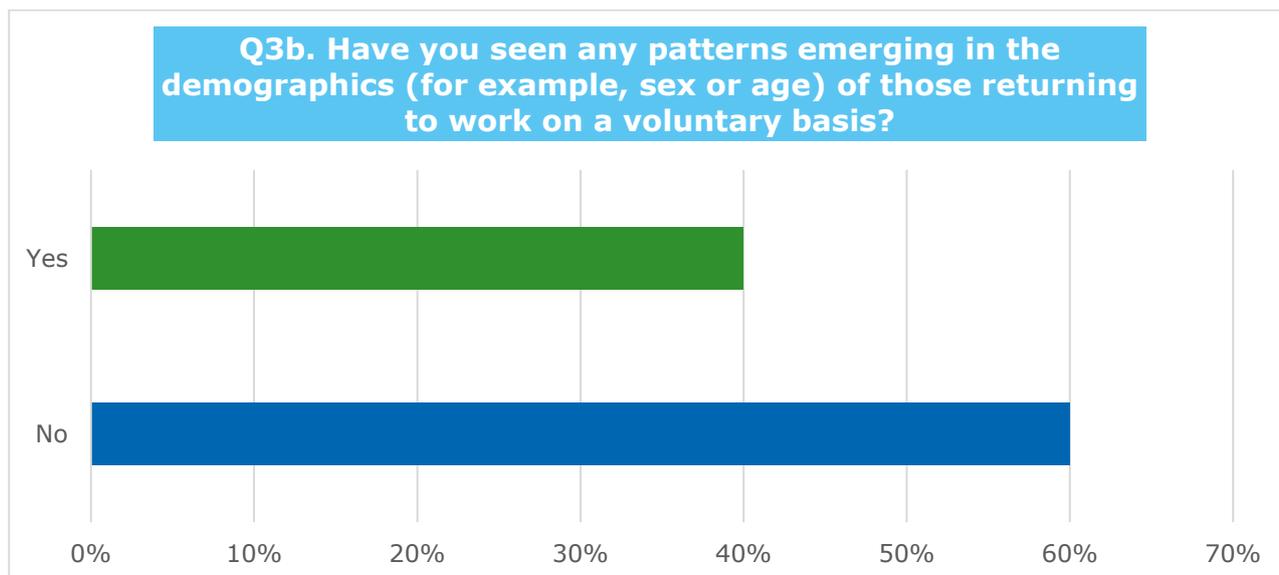
Voluntary or compulsory return?



Just 17% of respondents to the survey reported that workers had returned to the workplace on a required basis, with 38% returning on a solely voluntary basis and the majority (45%) applying a mixture of required and voluntary returns.

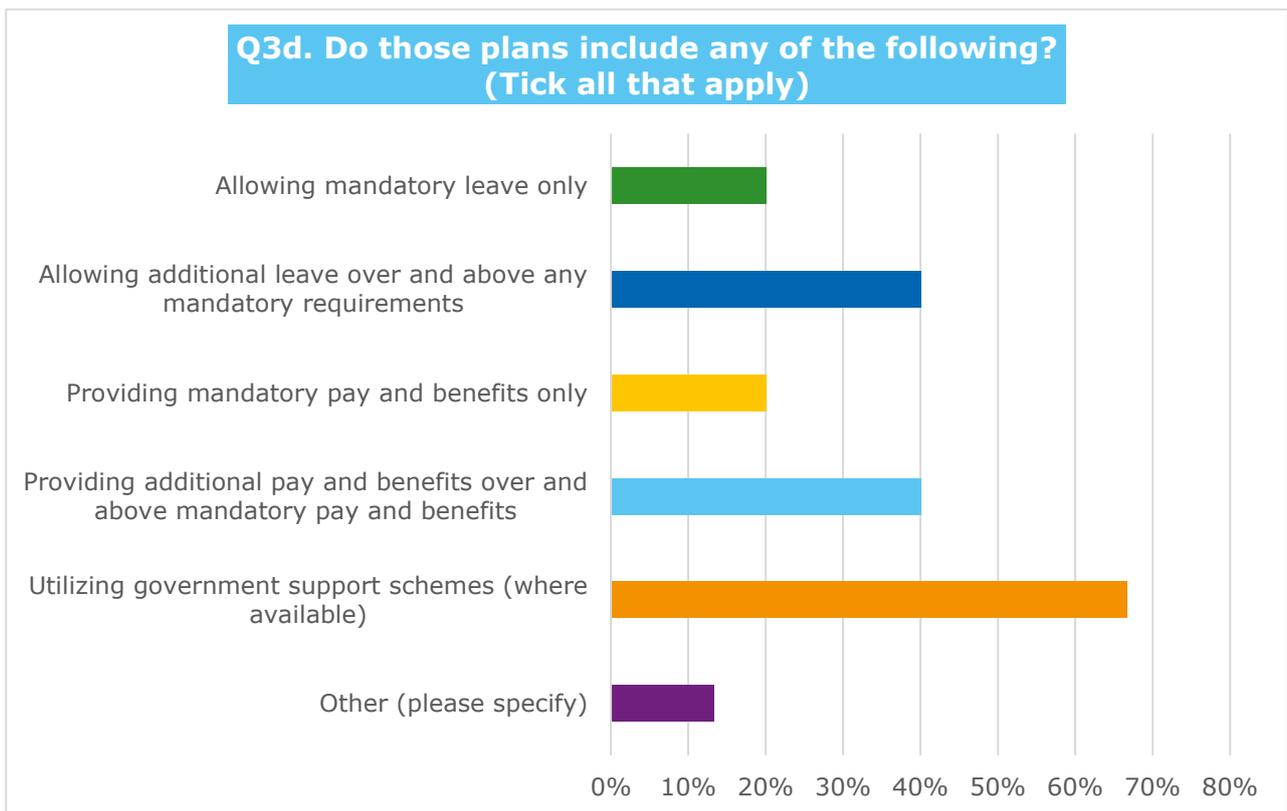
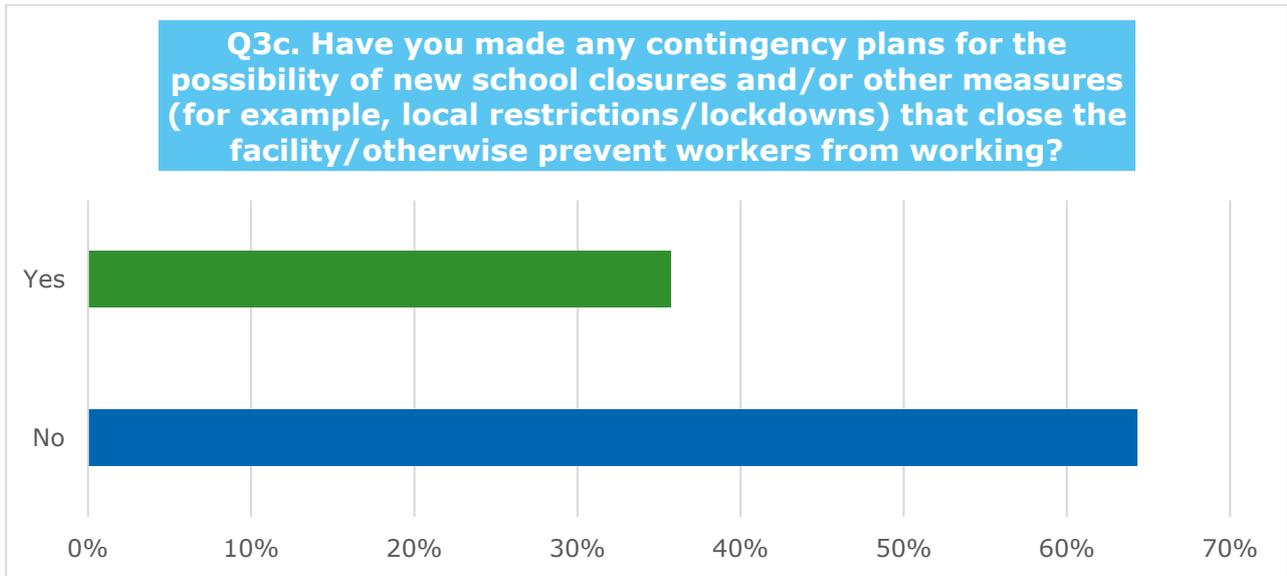
Where workers were required to return, employees returned at the same time in just 20% of cases, with a staggered approach more usually adopted (80%). Where that staggered approach was adopted, factors applied to determine who should return and when tended to be based on the ability to work remotely, business need and criticality of work.

Demographic patterns amongst returners



Many respondents (40%) reported that they had seen patterns emerging in the demographics of those returning to work on a voluntary basis. It was reported that generally younger and older workers had been the groups choosing to return. Further, that sub-optimal home working arrangements were reasons often cited by younger employees as the reason for wanting to return.

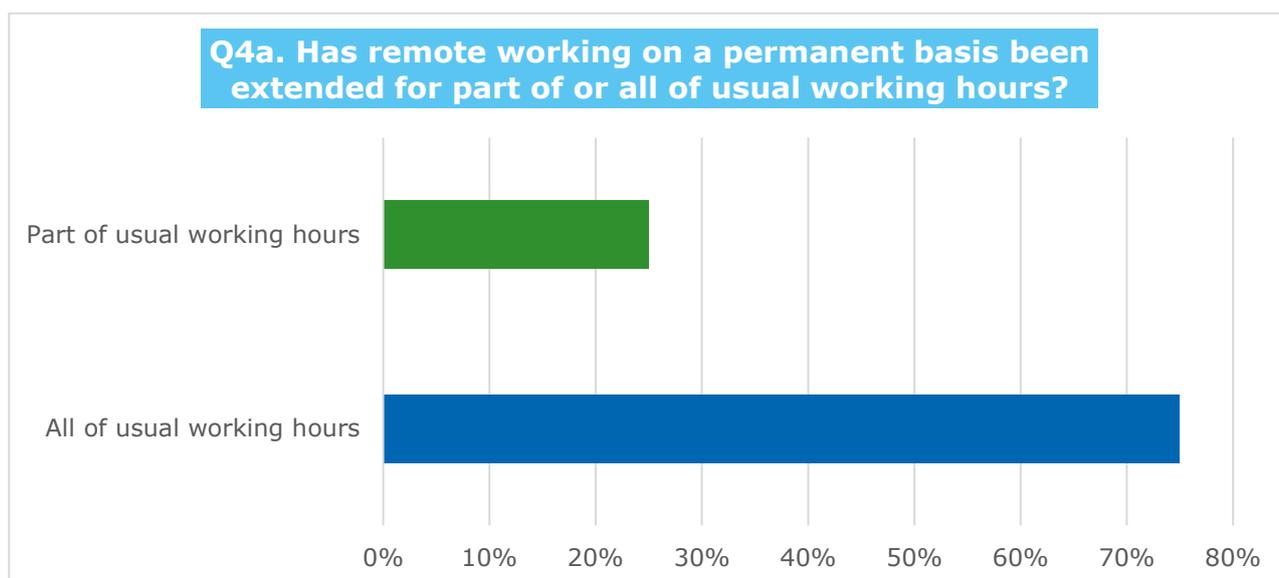
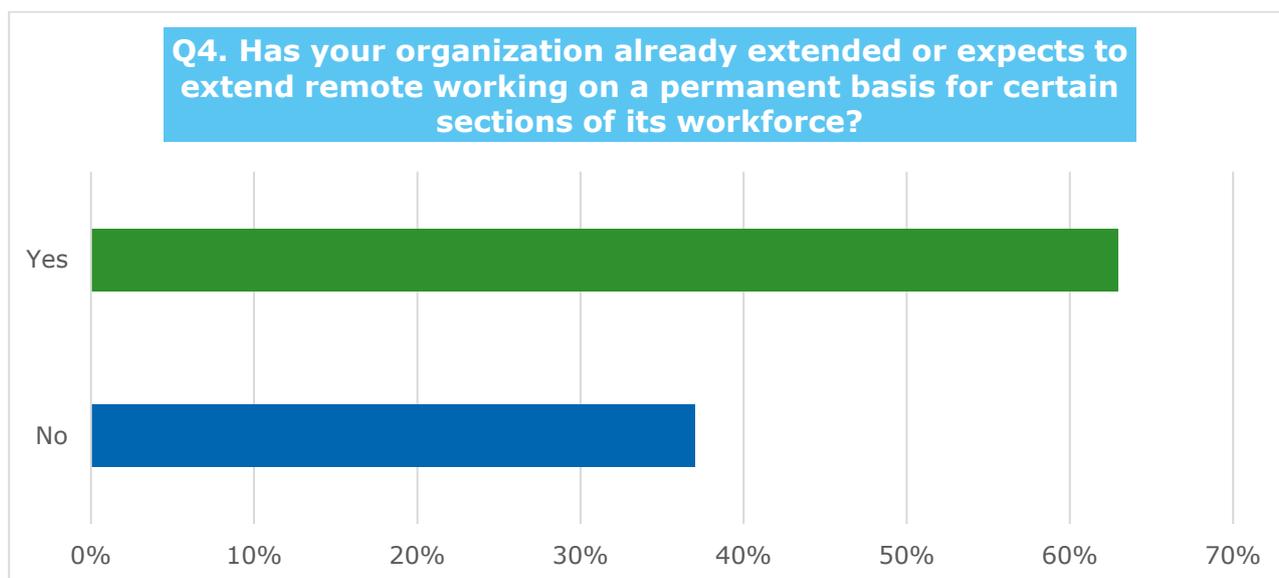
Contingency plans



Around two thirds (64%) of respondents had made contingency plans for the possibility of new measures that prevent workers from working.

Consistent with the indications in our original survey of employers embracing the new working landscape and recognizing the importance of support measures, in many cases (40%), organizations planned to provide additional leave, pay and benefits over and above mandatory requirements.

Remote working

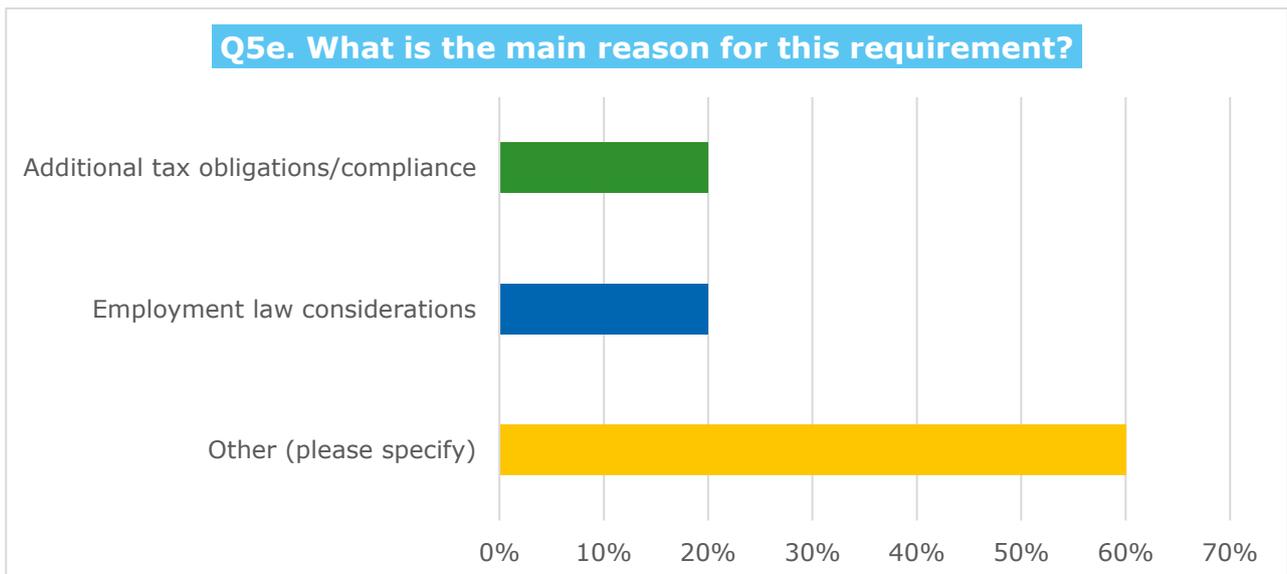
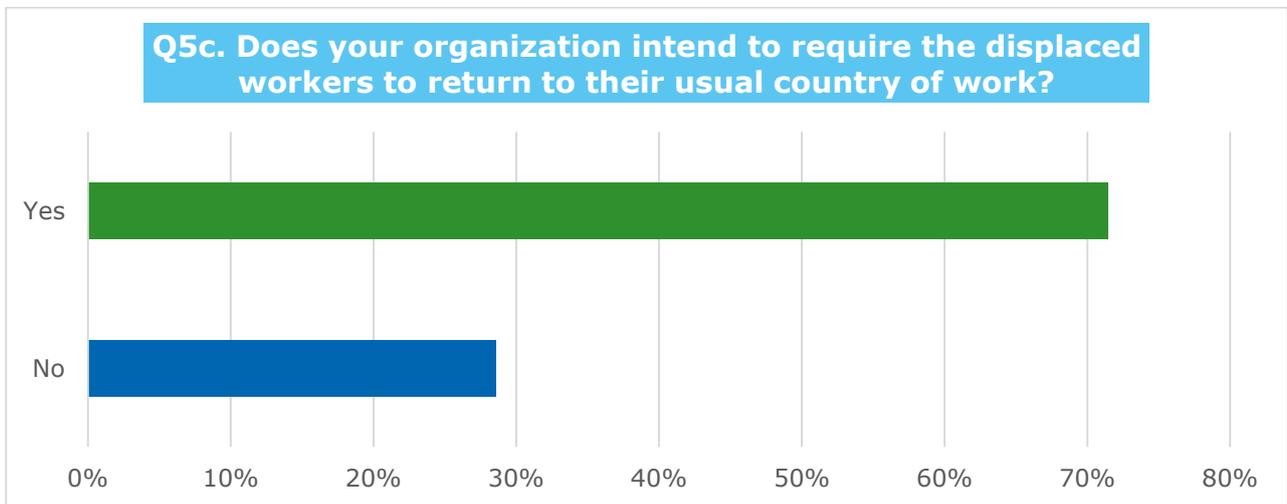
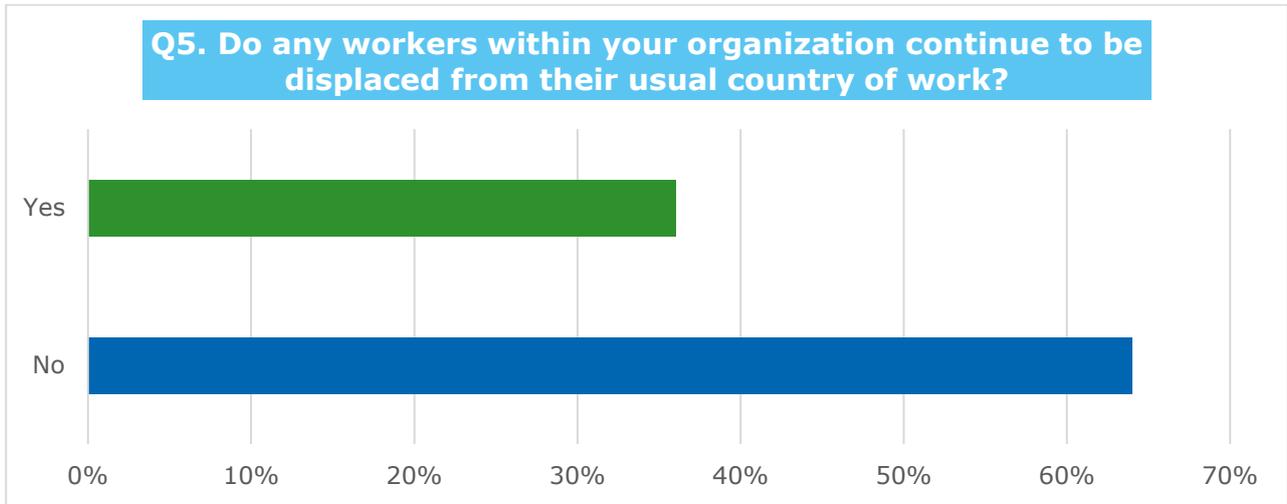


In our original survey, 54% of respondents said that they had already extended or expected to extend remote working on a permanent basis. That figure rose in our refreshed survey, with 63% of respondents now confirming plans for permanent remote working for certain sections of their workforces. For almost two thirds of respondents, those plans applied to 30% or more of the workforce, with a 50:50 split between those requiring such arrangements and those allowing them on a voluntary basis. In the majority of cases (75%), permanent remote working had been applied for all of usual working hours.

At the time our original survey in July, many organizations were yet to consider or determine the criteria that would be applied to determine whether remote working requests would be accepted. By the time of our refreshed survey, many reported more certain criteria (including job requirements, role responsibilities and location) and some had implemented new policies.

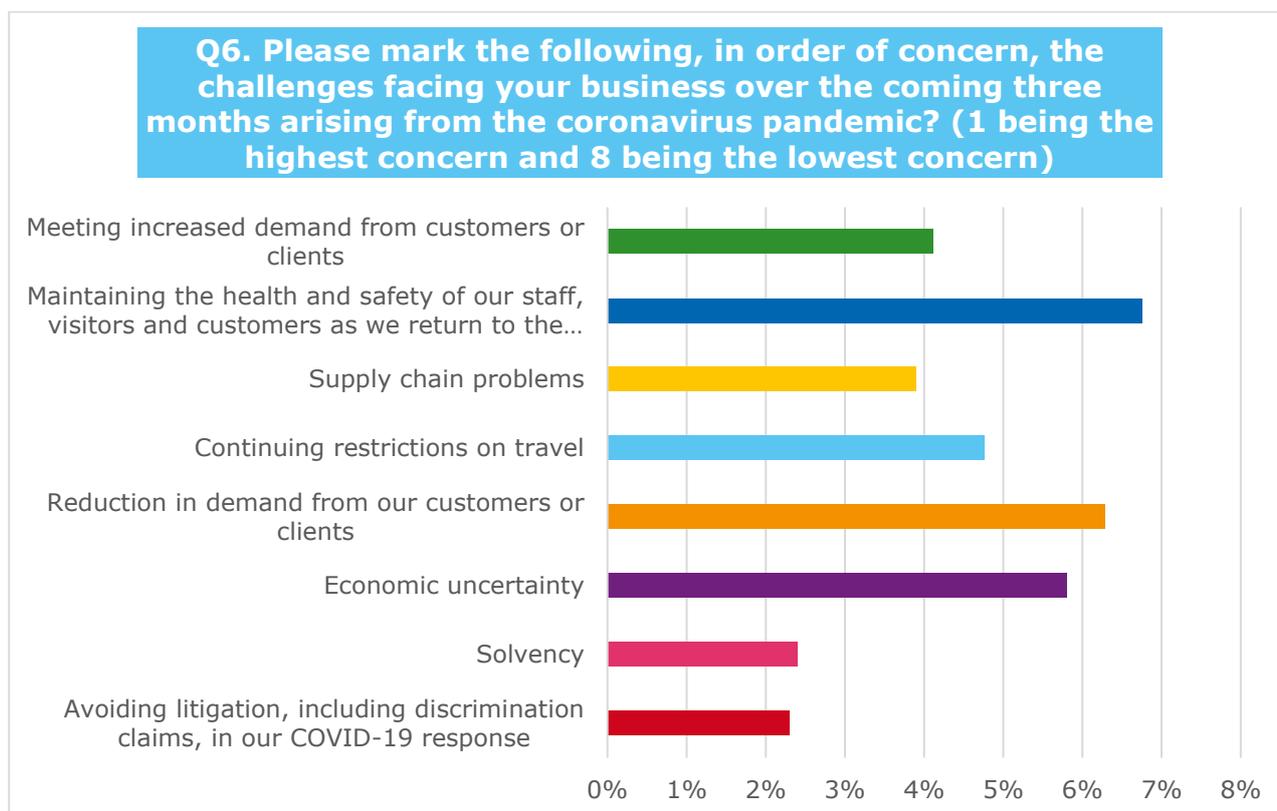
No respondents reported any adjustment to remuneration packages to accommodate new working arrangements, although we are aware that this is an issue that works councils have started to raise in some jurisdictions.

Displaced workers



36% of respondents indicated that they have some workers that continue to be displaced from their usual country of work, with 71% intending to require those workers to return to their original location. Of those requiring such return, many (40%) reported that the main reason for that was additional tax obligations or employment law considerations.

Challenges ahead



In our original survey in July 2020, economic uncertainty, concerns about reduction in demand and maintaining health and safety featured as the biggest challenges facing businesses over the coming months. A few months on and our refreshed survey mirrors those previous concerns, however solvency, supply chain problems and avoiding litigation now feature more prominently. Given the large number of organizations who have relied on government-funding during the pandemic that may now be coming to an end and the consequent likely increase in dismissals, it is clear to see why those added concerns are now featuring.

Final comments

The result of our most recent survey continues to demonstrate organisations embracing new working arrangements and starting to consider how to reshape workforces in the longer term. With the test of time, new working arrangements are inevitably becoming more accepted as longer-term propositions. However, with continued twists and turns on the landscape, including the increased regulation of remote working arrangements in many jurisdictions, the removal of government financial support and the roll-out of vaccination programmes globally, different challenges will inevitably feature. Sharing learnings and experiences will play a key part of navigating the road ahead.

To discuss how we can support your business navigate through the challenges COVID-19 has highlighted for multijurisdictional workforces please feel free to get in touch with one of Partners listed below, or speak to your usual Eversheds Sutherland contact.



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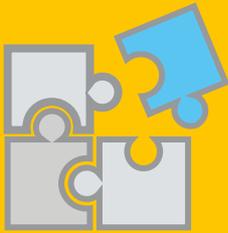
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