

COVID-19 IMPACT, STRATEGY & RESPONSE IN THE TECHNOLOGY SECTOR

International SOS' Benchmarking Survey Analysis
FY 2122 Q1

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STUDY OVERVIEW

International SOS' COVID-19: Impact, strategy and response in the Technology sector, aims at understanding how US-based technology organizations are managing the COVID-19 pandemic crisis, the approach taken toward creating or upgrading their Crisis Management Team, the challenges faced by such teams, the measures put in place to allow domestic and international business travel, the new security challenges associated with distributed workers and the overall actions taken by these organizations to manage the crisis.

Disclaimer

The COVID-19 pandemic is evolving daily. This analysis reflects a point-in-time snapshot of organizations strategy and response in the Technology Sector, in the US, reported during FY2122 Q1 only.

FOREWORD

Crisis managers considered infectious disease the greatest threat to employee productivity now and into the future.

Managers have been dumfounded by the complexity, intensity, and duration of a pandemic. Even when employees remain healthy, the stresses of protecting themselves, their families and colleagues is an ongoing challenge. While pandemics were barely on the radar prior to COVID-19, the paradigm has changed. With global warming all types of infectious diseases - including mosquito-borne diseases like malaria, dengue and zika - are now solidly on the radar and plans are being made for the inevitable next global challenge.

Going forward, there is a lot of work to do, and a lot of resources required for Crisis Managers to respond effectively to health and security threats and challenges. Subject matter expertise is required not only for the dynamic health and security information and local knowledge but the ability to take that complex data and communicate it effectively.

Dr Myles Druckman
Global Medical Director
International SOS

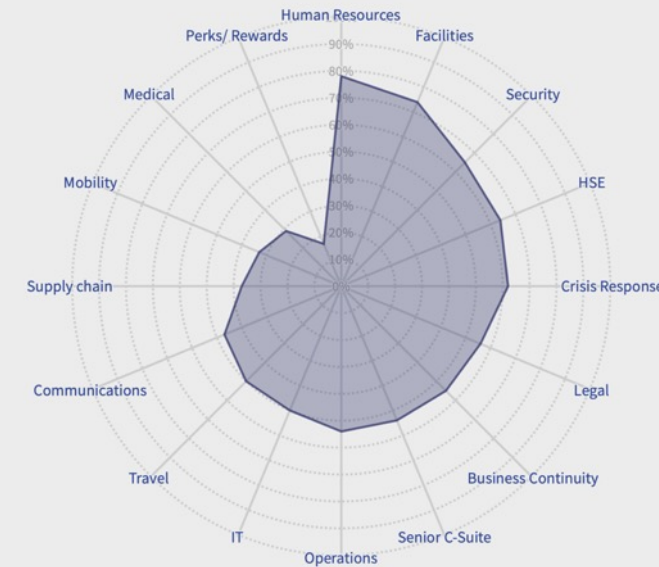
1. COVID-19 Taskforce resourcing, communication, and threshold for activation

Crisis Management Teams are a necessity in today's world. Nearly 40% of organizations created a Crisis Management Team during the pandemic.

We've seen an evolution to the remit roles and responsibilities of Crisis Management Teams - COVID-19 Taskforces almost across the board. Given the duration of the pandemic, the typical process of standing the CMT for a limited duration of time and getting them down once the crisis concludes, is no longer applicable. What we've seen as a result is the re-tasking of security and risk personnel with additional responsibilities related to covid requirements.

In short, one key common denominator is the sourcing of reliable and timely intelligence that has become a core function of those teams and likely will be for the foreseeable future. What this has done essentially triggered a capacity and resourcing constraints within many of those security teams. This can be a particularly critical issue when those teams must manage a concurrent crisis. We've seen that a lot this year, we've seen political unrest taking place in many countries and that has consumed the tasks and responsibilities of certain teams which are going to already cast with covid responsibilities or a mass casualty attack or natural disasters like what we're seeing now in the in the Caribbean or the wildfires out west.

Most represented departments in Crisis Management Teams/COVID taskforces



Roles representation in %

- Human Resources - 78%
- Facilities - 74%
- Security - 65%
- HSE - 64%
- Crisis Response - 62%
- Legal - 56%
- Business Continuity - 55%
- Senior C-Suite - 54%
- Operations - 54%
- IT - 50%
- Travel - 50%
- Communications - 47%
- Supply chain - 37%
- Mobility - 33%
- Medical - 29%
- Perks/ Rewards - 17%

“Our crisis management framework was already in place across the entire organization. We leveraged that crisis management framework to include the sub teams spinning up, spinning down the cadences associated based on whatever the changes were in the environment.”

Alan Borntreger
Director - Corporate Security
Dell Technologies

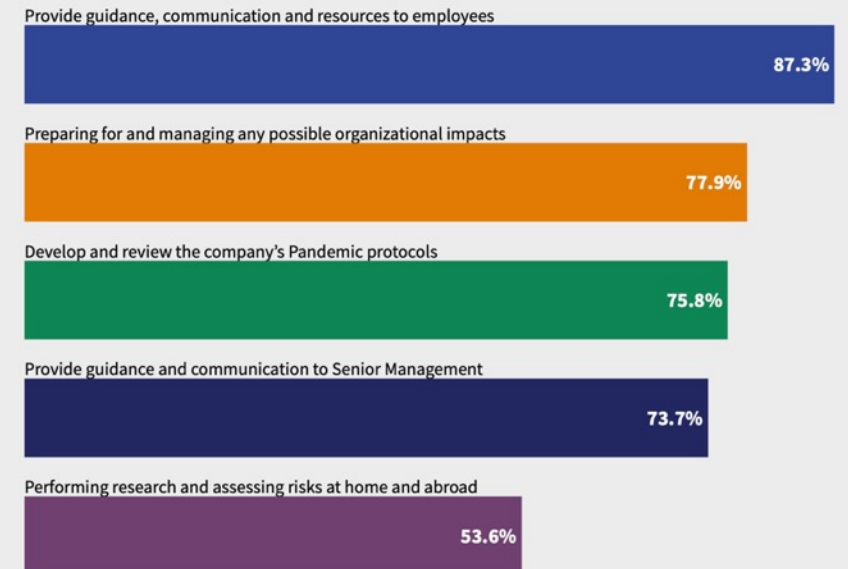
Crisis Management Teams are here to stay. Among those who added a Crisis Management Team during the pandemic, 1 in 2 organizations say they will make it permanent.

We're seeing a lot of organizations relying on their internal resources to lead the organization through the ups and downs of the pandemic. However, it is a unique skill set to really understand both the health and security implications and public health issues and how it relates to the organizational challenges and finding the right balance of what you can do within an organization that both meets the local government and regulatory requirements, but also keeps your people as safe as possible and finding that balance, within a budget. It's been a major challenge even for operations in the US.

One can only imagine magnifying that challenge when operating in several countries like India or other Asian countries, Africa, Latin America, South America where each of those local jurisdictions have different requirements, different restrictions, different health capabilities and different security challenges. It becomes extremely complex. As a result, we have seen an exponential growth in the number of organizations that have taken on medical experts for instance. These resources will be necessary to any organizations post pandemic because of issues like climate change or other infectious diseases and having that resource who understands your business, understand your culture, understand the health issues and understand how crisis management teams and task forces work is crucial to resiliency today and in the future.



Top 5 responsibilities of Crisis Management Teams



2. The main challenges for COVID-19 Taskforce and Crisis Management Teams

COVID-19 has companies at all levels operating in a constant state of uncertainty.

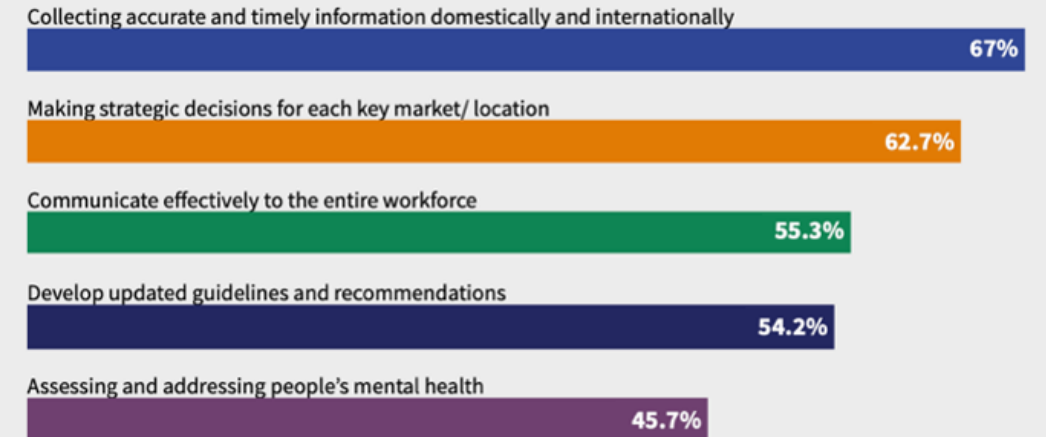
The regional and local impact of the COVID-19 crisis has significant implications for crisis management and policy responses. Collecting accurate and timely information domestically and internationally is the top priority for 67% of Technology companies in order for them to be able to make the best-informed decisions to protect their workforce and families.

Having the best and latest information is only as good as the Communication of it, never more so than with remote working. The Covid pandemic forced companies to move almost overnight, to a remote working environment, for some companies this was relatively new and untested. Being able to provide workers with accurate information, guidance and direction in a timely, uniformed, and global way is critical.

“Data drives decisions and you’re only as good as the data that you can get to drive those decisions.”

Dr Myles Druckman
Global Medical Director
International SOS

Top 5 challenges faced by Crisis Management Teams



“Intelligence is a critical part of shaping our response. We look at all facets of information we obtain whether it is from CDC, WHO or International SOS with whom we partner closely with, evaluating various aspects, concerns and the potential impact. We have so many people that we are looking not only at viruses, but also the risk from medical, security, safety - everything we can - and have built out a more robust intelligence function within the company.”

John Endert
Senior Manager, Global Travel Risk and intel
Cisco

With time, public health authorities got better at presenting their information and their data but it's still very much a manual effort for a lot of organizations and the resources are lacking. In the US only, each state and county are collecting, publishing, and presenting data in a different way. The challenge internationally is getting that data at the local level and getting it in a timely and accurate manner, then matching it against available information on infrastructure. How is the health care system? Is the hospital system good? Are they going to be able to cope with a surge in cases or not? How does their supply chain look like? The question is how organizations can start to predict where there is weakness in certain jurisdictions and preposition their assets so they can help their people better. Where innovation is going now is toward data analysis automation in order to help take away the manual effort at getting local information in a systematic way and ultimately take some of the heartburn off organizations.

The COVID-19 pandemic has caused undue stress and confusion. Many Health authorities have lost their credibility, and employees value and trust their company to provide them accurate information. A pandemic by its nature will evolve and the science and recommendations will continue to change. Keeping consistent, global information that is practical and relatable was deemed the highest responsibility of the crisis management team. If the task can't be undertaken internally due to resourcing constraints, it is advised to bring external advisors on board sooner rather than later.

“Information can change quickly. At Facebook, we knew that not only having our cross-functional crisis management team assembled was important, but we knew that communicating with our employees was important. We had International SOS and a variety of other medical experts on the team and therefore we as a company had access to information even before it was actually in the public.”

Erin L Wilk
Head of Global Security Organizational Design & Development
Facebook

3. The "New Normal" for remote work and its impact on organizations

Among all participants, 67% said their organizations have not put any restrictions on their employees' choices of work locations.

Tech companies have really looked at the pandemic as an opportunity to rethink the future of work and where people's locations are and where they get talent and hybrid arrangements in terms of what's office, what's remote work. It is therefore not a big surprise that almost 70% of the tech companies responded that they didn't put any restrictions on their employees.

Case-by-case is the new watchword

We gave all participants a blank text field to share what plans were put in place to manage situations where an employee may wish to work from a higher risk location. Once again, the word cloud analysis revealed an employee-centric approach where most decisions are taken on a "**case-by-case**" basis. This type of approach is likely to be valued by the employees covered by it, and it may become an entrenched expectation for which reversion to the pre-pandemic norm could be met with resistance. This could prove to be a challenge for tech firms where in-person collaboration is considered vital to innovation and other key drivers of success

It might also prove difficult in cases where employees have chosen to base themselves from countries with higher levels of security risk, or very remote locations with limited services.

"I think that line has become increasingly blurred and I think organizations are going to have to grapple with this one because if you think about, if you can define that work location is regardless of where you are in the world, whether it's assigned to a client's site, traveling on business, working in a coffee shop, working in one of the brick-and-mortar offices that we have or working from home again, where does that stop and start? In certain jurisdictions, as an example, there's an expectation for ergonomic equipment to be issued for team members who are working from home. How will that translate to things like duty of care for other exposure, security, medical or otherwise?"

Alan Borntager
Director – Corporate Security
Dell Technologies

Complications to how duty of care is executed are certain to put strain on HR teams amid constantly shifting on-ground realities borne of evolution in the epidemiological situation, and corporate leadership's need to constantly adjust employee guidelines. Fleshing out of HR and Security teams may become a necessity if the case-by-case approach is to be maintained, and we should expect to see variation across tech companies in this regard. Several such firms have already fully adopted a work-from-home approach or one of many hybrid models. Competition may still force those firms to continue adapting this though as circumstance evolve.

Further analyzing the word cloud analysis, we might conclude that risk management, resource needs and business assessments are also key secondary factors here. Risk assessments that justified allowing remote work during the rolling peaks of the pandemic will need to be adjusted eventually, and those adjustments may lead to conclusions that necessitate difficult changes for the management of security risk and best practice duty of care. Resourcing employees in remote locations will also strain security and operations managers on logistical execution. All in all, the evolving global epidemiological situation is sure to sustain a complicated situation marked by frequent adjustments, new arrangements and oft-tricky communications with employees for months - if not years - to come.

“Security managers will see their roles evolve to include monitoring and support to a wider array of local national employees based in a wide range of geographies.”

Paul Doucet

Regional Security Manager, Canada
International SOS



4. Tech companies have big travel plans but the after-pandemic will be more challenging for border-crossing

Tyler Hosford, Regional Security Manager, West US International SOS

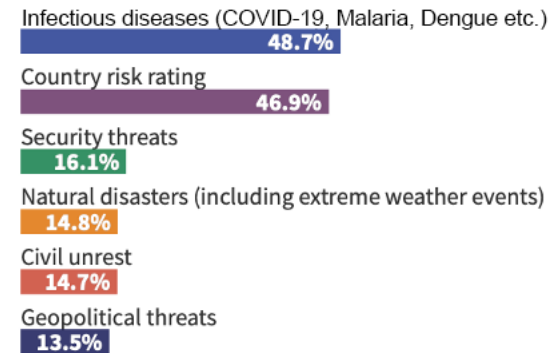
All participants shared what caused business travel itinerary modifications in 2021 and what it is expected to look like in 2022. Surprisingly, the top five causes remain the same for both years. However, participants see 2022's challenges as having on average a 70% larger impact on their business travel than during 2021.

Before COVID-19, more than half of business travelers booked their journeys outside the company's travel policy program. The future will likely be very different. Not only will business travel be extensively monitored by travel managers, but corporate policies will need to be agile enough to evolve within a constantly changing environment.

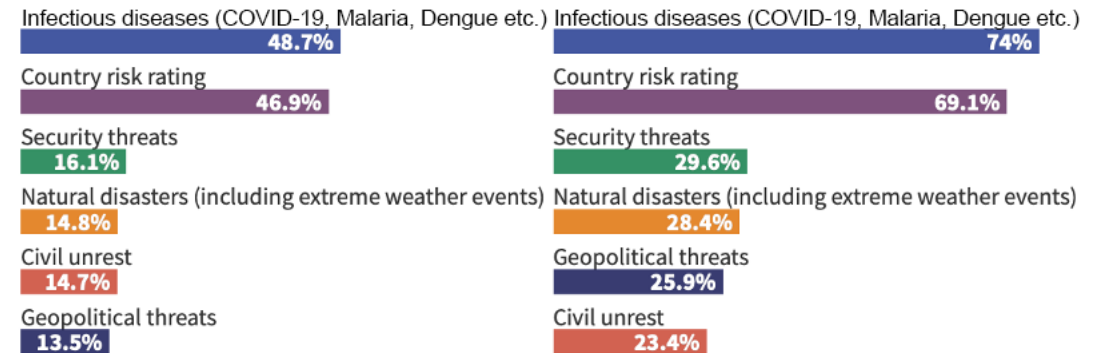
When looking at how respondents rated "Top 5 reasons for business travel itinerary modification in 2021 and 2022" there are two interesting trends that give insight into how travel managers anticipate the logistical hurdles of travel as we move through COVID-19. First, that there is a greater increase in every category means these leaders see travel as increasing in general. And second, that respondents feel that all travel threats - including security, natural disasters, civil and geopolitical - will increase itinerary changes, not just those from the pandemic.

Top 5 reasons for business travel itineraries modification in 2021 and 2022

2021



2022



But the main take away is the significant increase in how respondents see infectious diseases impacting travel, and COVID-19 remains top of mind. Despite the late summer spike in cases from the Delta variant, as vaccination numbers reach higher thresholds, cases should decrease.

Many leaders see 2022 as a true return to travel, and yet COVID-19 is still a major concern. It is important to remember the amount of business travel outside of North America and Europe. Many countries in the APAC region focused on a "Zero COVID" strategy before opening borders, but that now seems unlikely. Travel to these destinations will remain in flux through much of 2022. Based on current vaccine production and rollout, the timeline for global levels of vaccination to suppress COVID stretch into 2023 and possibly beyond.

5. Beyond COVID-19 – Lessons learned and application

Nearly 70% of companies updated their security risk policies and nearly 50% have included risk assessment and their travel process.

The on-going nature of the pandemic means Tech companies find themselves at various stages of crisis management and crisis response. Most organizations updated their **health & security risk policies (68%)**, included **risk assessment in their travel approval process (45.7%)** and implemented **health & security training (37.1%)**. Very close behind are also a large number of organizations which have introduced **pre-trip and during trip advisory emails (35.7%)** or invested in **crisis communication systems (34.2%)**.

“Our risk policies existed but they certainly had to be adjusted. Back to the know before you go and the associated data that we’re attempting to gather whether it’s the restrictions by locality or the exposures, all of those factors are now thrown into the mix and that includes a much more automated process for approval prior to going to hire or extreme risk locations.”

Alan Borntager
Director – Corporate Security
Dell Technologies

Dr. Myles Druckman, Global Medical Director, International SOS

For organizations, this pandemic has reinforced the importance of health as a major threat to not only the world, but to business continuity. A pandemic is complex and is moving faster than our ability to understand it. Therefore, we need the best available local information in a timely manner to make the most informed decisions. And we need to understand that these decisions may need to change as research, guidance and requirements do. To do this on a global scale, with workplaces dotted around the world is, for many companies, an on-going and significant challenge. Health experts have become a key part of the crisis management team as they can translate complex clinical concepts into tactical local plans, thus providing critical assistance in this endeavor.

Technology married with expertise will help us now and in the near future to better understand the risks and mitigation measures wherever we may live or travel. Everything is local, and getting local information, analyzing it effectively, and providing simple tactical advice, is the goal.

This pandemic will end. We might have another annual trip to get vaccinated in our future, but we will get back to “normal”. But for organizations, this pandemic is a wakeup call. How we best monitor, predict and prepare for the next one will be critical to limiting the duration and hardship felt by our people and the world.

German Castro, Regional Security Manager, Central & Gulf, US International SOS

With 40% of Technology companies having created a Crisis Management Team during the pandemic, and 1 in 2 planning to make it a permanent addition, there is a clear shift in the perception and management of risk for the rest of the year and beyond. The main key drivers are exposure and the continuously evolving knock-on effects of the pandemic.

First, even though travel never really stopped for at least 50% of technology companies, most risk/security managers are certainly expecting a gradual increase in travel throughout 2022 - both domestic and international. (In the last quarter of 20/21 alone, domestic travel increased by 75% QoQ). This translates into increased exposure; so rather than just a handful of travelers/employees being exposed to a limited number of risk environments, companies have a significant number of staff of different profiles and backgrounds traveling through a wide range of different environments with varying levels of risk.

As a result, there is a greater likelihood that an individual might run into trouble and thus must alter plans, postpone a trip, or seek assistance. This will be particularly difficult to manage since risk/security teams will not grow at the same rate that travel populations do, so inevitably companies will have resourcing constraints within the teams that are looking after travelers.

The second driver is the recognition of the profound impact that the pandemic has had on the world's economies, particularly in the developing world.

As vaccine roll outs progress slowly, issues like increasing unemployment, the cost of basic goods, and lack of access to financial relief among others, will continue to worsen and thus re-shape the security landscape. We've already seen increasing levels of criminality, frequent widespread unrest and broad political instability emerge in many geographies as a direct result of the pandemic's economic impact. The data showcased in this study shows the lack of optimism from risk/security managers that this current trajectory will be corrected in the next 12 months. As such, travelers in 2022 will be going out into a very different world than the one we knew in 2019, and that will bring an additional set of challenges as well as necessary preparatory actions for risk/security managers.

Recently, many organizations had to address and emphasize the importance of the health and wellness of their employees due to the COVID-19 pandemic. Most organizations and C-Suite executives have now had to prioritize not only traditional health, but now more specifically mental health and wellbeing necessities, knowing their staff's health is vital to the business.

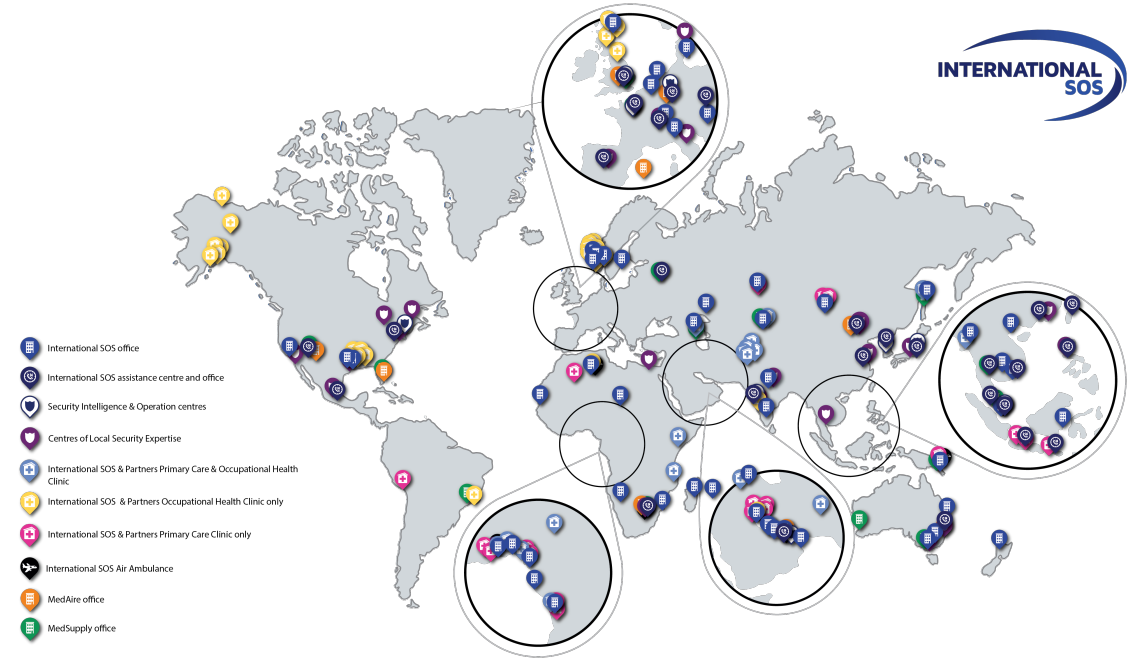
Maintaining good health of their employees can mitigate the impact of a possible future pandemic and address other sustainability issues. Organizations are now realizing the need to seek strategic advice from expertise to aid in creating long-term successful plans.

Miriam Jones, GM & SVP, West US, International SOS

The protracted nature of the COVID-19 pandemic has presented a myriad of challenges for companies. Throughout the pandemic, our tech clients' teams have been laser focused, while anticipating and continually adapting to this rapidly changing threat, on a common paradigm objective: protecting their global workforces.

Duty of care has evolved over the past 18 months with the responsibilities of employers shifting to supporting highly distributed workforces. This has required adjustments in how our clients support their workforces, and they have done so through a lens of listening to their people and re-imagining their futures. COVID-19 has shone a light on how important it is for companies to have a global policy with regional protocols that are readily adaptable to local conditions and needs and compliant with local regulations.

This is where International SOS' expertise, global reach and understanding of local markets, infrastructure, and bureaucracies has been most helpful for advising our clients on how to maintain a safe and healthy work environment, wherever their people are. We have stayed close with our clients throughout the pandemic and supplemented their efforts by enhancing our capabilities, repurposing our expertise, and expanding our resources to support them where and when needed as a global trusted partner.



Thank you to our clients for participating in this survey, as it helps us continue to adapt our solutions to provide optimal resiliency to our clients' people and the communities they serve.

If there are additional benchmarks that you would like for us to capture and report to you, or if you have other suggestions for how we can better support you, please provide us with your feedback here: <https://bit.ly/2WUvJKB>

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EXPLORE FURTHER

Organizations have a heightened Duty of Care responsibility to ensure the health, safety and security of their workforce which needs protection in the face of the ongoing COVID-19 pandemic.

International SOS provides actionable insights and unparalleled services that support business resilience and enable safe post-crisis return to work, travel and operations. Workforce resilience supports in-country people managers, site-based workers, domestic and international business travelers, international assignees and office/ home based workers.

To learn more about International SOS' solution including intelligence and advisory, global assistance services, training and monitoring please visit:

<https://my.internationalsos.com/workforce-resilience-solution>

ABOUT INTERNATIONAL SOS

SINCE OUR INCEPTION IN 1985, WE HAVE PIONEERED THE MEDICAL AND SECURITY TRAVEL RISK SERVICES INDUSTRY.

Founded in Singapore by Arnaud Vaissié and Dr. Pascal Rey-Herme, International SOS has become an undisputed global leader offering health and security risk management services, and access to healthcare and emergency interventions.

Operating in 85 countries, the company employs 10,000 health, security and logistics experts dedicated to supporting and assisting 12,000 organizations 24/7, including the majority of the Fortune Global 500, as well as Governments and NGOs.

The company benefits from a well-balanced exposure between America, Asia-Pacific and EMEA.



WORLDWIDE REACH. HUMAN TOUCH.