



THE FORCES SHAPING OUR FUTURE

In a complex and ever-changing world, we build our business to reflect our values and strengthen our core capabilities, not only for today's world, but for tomorrow's. The forces that shape the world we live and work in bring significant economic, social and environmental impacts and challenges for businesses and societies.

We are determined to meet these challenges in our day-to-day operations and in the services we provide to our clients. In an increasingly interconnected and globalised world, that is striving for sustainable development, recognising and addressing the key trends affecting our business is imperative. This is how we help our clients secure their employees' wellbeing wherever they are in the world, and shape our own future as a successful business in a more sustainable world.

“ Organisations and their employees face an ever-increasing variety of risks. Now more than ever, policies and procedures that ensure the health, security, safety and wellbeing of all employees, in all locations, at all times are critical to a sustainable business. Sustainability in action needs to be a focus for business leaders.

We are ideally placed to help our own organisation, as well as those of our clients', with the sustainability challenges posed by our changing world. We pride ourselves on being a learning organisation and on continuously transforming our business along with the changing needs of our clients and the environments we operate in. ”

— Kai Boschmann
Chair of the International SOS CSR Committee
& Executive Director of the International SOS Foundation



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1. The health and wellness agenda is transforming rapidly

The issue

The expectations on businesses to preserve, promote and enhance employee wellness have never been as great as they are today. The benefits are clear: improved employee health can increase productivity, reduce injuries, improve safety and reduce healthcare costs. Increasing numbers of studies show the impact on healthcare spending and macro-economic productivity. But today, non-communicable diseases (NCDs) such as diabetes, heart disease and mental illness kill almost 40 million people globally every year.

The decline in the stigma surrounding mental health is a huge opportunity to improve wellness and transform organisations' capability to support employees throughout their lives. More than 450 million people suffer from mental illness; they come from all countries, industry sectors and walks of life. By 2030, depression will be the second largest contributor to disease burden in middle-income countries, and the third largest in low-income countries. However, society is becoming ever more open. Initiatives like World Mental Health Day are getting organisations and employees alike talking more about the factors that drive mental wellbeing, both inside and outside the workplace.

Within the workplace, employee wellness programmes are becoming increasingly popular. Good health positively benefits an individual's career, wellbeing and morale. It increases longevity and ignites productivity. Health and wellness programmes are clearly becoming an essential part of company culture.

Our response

At International SOS, our entire business is aimed at motivating and inspiring our clients' workers around the world to take charge of their health. We help our clients support and care for their workers, whether they face traditional workplace risks of accident and injury, non-communicable diseases or other factors. We look after people not only while they are on business premises, but in their travels and as members of the local community.

International SOS provides solutions to manage work-related stress; injury and illness reporting; health policies, standards and procedures; health screening; drug testing; return-to-work programmes and more. We constantly monitor trends in medical and scientific literature. We work with our clients to understand the realities of the modern workplace and how we can provide an increasingly better service that makes a real difference to people's lives.

https://www.who.int/whr/2001/media_centre/press_release/en/
https://www.who.int/gho/ncd/mortality_morbidity/en/
<https://www.internationalsos.com/medical-and-security-services/occupational-health>

2. The impact of natural disasters on business and employees is increasing

The issue

Natural disasters such as earthquakes, floods and fires are inevitable – but many are increasing in frequency and severity. Unprecedented destruction has resulted from such incidents, affecting lives and businesses around the world. The 2017 hurricane season in North America and the Caribbean brought three of the deadliest and costliest storms on record. Within just a few weeks, Hurricanes Harvey, Irma and Maria together caused damage in excess of US\$250 billion.

Furthermore, natural disasters account for 43% of changed travel plans. Erratic weather results in a high demand for International SOS services, such as disaster planning, evacuation and emergency medical services. The effects of climate change are likely to continue this trend well into the future.

As businesses consider the consequences of natural disasters, they are reviewing their own climate policies and investments in technology. Their investors are also rethinking their approach to climate-related risk. This means businesses must strengthen their preparedness for such events.

Our response

Our global network of Assistance Centres enables us to continuously monitor situations around the world, ready to mobilise resources wherever our clients need them. We work to develop the most advanced and effective solutions available to help our clients assess risks and prepare for them. We also offer assistance in emergency situations and disasters.

Our clients avoid lost time and increase productivity by preparing their employees for travel, and supporting them in remote and unfamiliar locations. We help by assessing and understanding the risks at the destination, educating travellers before they depart, and providing round-the-clock access to local advice for travellers.

<https://www.ipsos.com/ipsos-mori/en-uk/perceptions-travel-risk>
<https://www.internationalsos.com/topics/natural-disasters>
<https://www.nhc.noaa.gov/news/UpdatedCostliest.pdf>



3. Globalisation is increasing international mobility

The issue

The pace and demands of global businesses are encouraging more and more workers to travel. The nature of remote work is also changing, becoming more flexible and adaptable, and occurring in higher-risk developing economies as frequently as traditional business centres.

At the same time, mobile workers' habits and preferences are changing – less preparation time goes into travel plans, and they want flexible and adaptable services to accommodate their needs. New models such as peer-to-peer lodging in private homes and sharing taxi services are rapidly displacing their traditional counterparts in many markets around the world. These bring new risks for mobile workers, on top of long-standing ones like road safety; although road accidents remain one of the most common dangers to mobile workers.

Many companies are insufficiently prepared to help their workers face these challenges. Most companies do not implement safety and security checks, have not integrated their travel risk programme into their overall business sustainability programme, and have not grasped the impact of wellbeing issues, such as traveller health and fatigue, on their mobile workforce.

Our response

We tailor our services to fit the needs of individual travellers in the real-world context of their work-related travel. We know that mitigating these risks – while keeping mobile workers happy, healthy and productive – requires specialist skills and local knowledge, and is essential to their safety.

We help our clients identify the issues associated with mobility, and manage them in the context of their overall health and wellness policies, risk management tools and communications strategies. Emphasis is put on educating and empowering their mobile workers about travel risks, and making access to assistance easy and clear.

<https://www.ipsos.com/ipsos-mori/en-uk/perceptions-travel-risk>
<https://www.relocatemagazine.com/news/international-assignments-mapping-the-risk-of-global-mobility>

4. Security threats can affect anyone

The issue

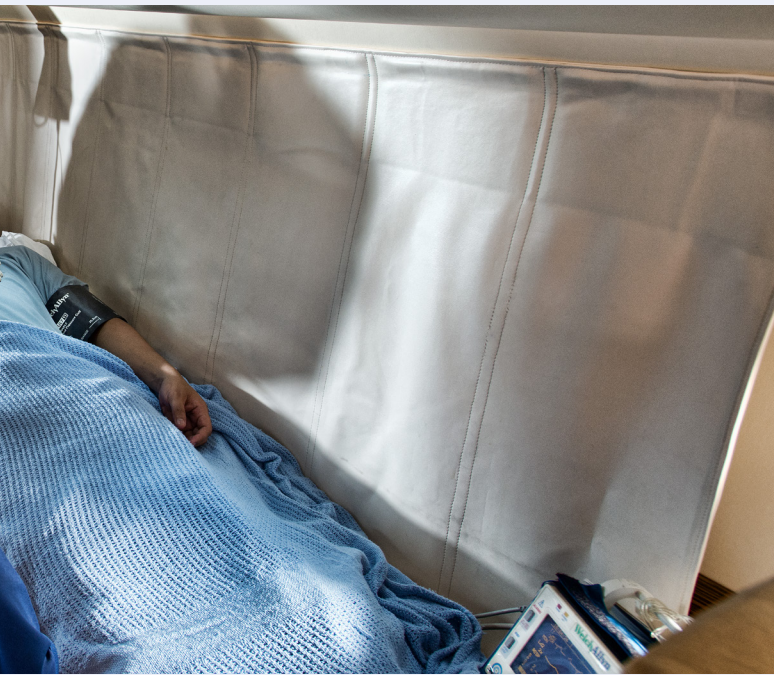
The last 20 years have seen heightened societal tensions in various regions. Incidents of terrorism in western countries doubled in 2017 compared to the previous year, and governments' formal assessment of terrorism-related threat levels has remained elevated.

The threat of an attack in public spaces, including airports, railway stations, tourist destinations and other heavily-travelled locations, can have a chilling effect on employee confidence. This challenges the viability and effectiveness of international business travel. Businesses perceive these risks to be increasing. Security threats are the most commonly reported reason for modified travel itineraries, presenting direct impacts in terms of time, complexity and cost.

Our response

These risks affect our own employees, as well as our clients who travel the world. We work with our clients to ensure they can prepare for these challenges, even those unforeseen. Our Travel Risk Map, Pre-trip Advisories, expert-led medical and security intelligence on 227 countries and 440 cities are invaluable resources for travel planning. This is backed by unparalleled experience and expertise on the ground, which helps our clients decide whether to travel and how to prepare. Our TravelTracker tool lets clients monitor where their employees are and their safety. We can provide our clients with the right response protocols for when threats occur, including evacuation plans.

<https://www.ipsos.com/ipsos-mori/en-uk/perceptions-travel-risk>



5. Geopolitical changes increase instability

The issue

Many of the established norms of international relations are facing challenges, as economic, political and cultural tensions increase. Long-standing trade relationships are facing renegotiation, while governments are increasingly prepared to take a combative stance with respect to migration, health, safety and security.

Impacts from geopolitical instability can affect our clients' employees, operations, revenues and supply chains, and can reduce employees' willingness to travel. The shifting sands brought about by increased geopolitical tensions often lead to a lack of trust in government and political stability, and confusion in the face of changing policies. Businesses with global workforces and increasingly complicated compliance obligations need to understand what is changing, where, when and how it will affect them and their employees.

Our response

Our security team constantly monitors national and geopolitical situations, to enable our clients to make informed decisions about travel. As situations change, we update our tools to ensure mobile workers are confident they comply with local laws and regulations. We can provide remote support, advice and access to travel assistance or consular services in the event of a change in situation.

<https://www.internationalsos.com/client-magazines/in-this-issue-3/geopolitics---changing-the-stakes-for-business-travellers>



6. Digitalisation is revolutionising services

The issue

The rapid growth and application of digital technology is driving businesses, and disrupting the status quo in the process. Technologies such as cloud computing, robotics, machine learning and artificial intelligence are driving change across businesses and broader societies, transforming customer expectations, product development and ultimately, how individuals relate to one another and to technology.

It is estimated that digital transformation could deliver around US\$100 trillion in value to business and society over the next decade. It is already influencing the way International SOS and our clients work, and offers up exciting new ways for us to collaborate.

Our response

Digitalisation creates the opportunity to develop new services and systems that are more flexible and more sophisticated, with increased capacity to monitor subtle change. We are investing in new tools and technologies to ensure we remain the world leaders, as our clients and their employees come to expect more real-time, online and personalised user experiences.

The growth of TeleMedicine brings new opportunities to deliver advice and services to support and promote employee wellbeing anytime, anywhere. We are working to develop future solutions that are medically and scientifically robust, regulatory-compliant, easy and attractive to use. We aim to create positive experiences for the people who will benefit from them while ensuring maximum compliance with data privacy rules.

<http://reports.weforum.org/digital-transformation/wp-content/blogs.dir/94/mp/files/pages/files/dti-executive-summary-20180510.pdf>