



RISK **OUTLOOK** **2021**

**INTERNATIONAL
SOS**




Ipsos

SPEAKERS



Dr Neil Nerwich

Group Medical Director, Assistance
International SOS



Mick Sharp

Group Director of Security Services,
International SOS



Dr Irene Lai

Medical Director, International SOS



RESEARCH PILLARS

**Workforce Resilience Council
Views (36 members)**

**Business Resilience Trends
Survey (1,400 participants)**

COVID-19 Impact Scales

**Location Medical & Security
Risk Ratings**

**On-the-ground Health &
Security Intelligence Network**



FIVE PREDICTIONS FOR

2021



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On-the-ground Health & Security
Intelligence Network



Peter O'Neil
CEO
ASIS International



Tim Janes
Chair
Business Continuity Institute (BCI)



Marc Burrows
Head of Global Mobility Services
KPMG



Rick Mounfield
Chief Executive
The Security-Institute



Judy Kuszewski
Chair
Global Sustainability Standards Board
(GRI)



Jaleel Rahiman
Secretary General
National Safety Council of Singapore



Steve Horvath
Chair
Work Wellness Institute



Wendy Stachowiak
Chair
GBTA (Global Business Travel
Association) Risk Committee



William Witham
CEO
AAMEG (Australia-Africa Minerals &
Energy Group)



John Ludlow
CEO
airmic



Warner Hudson
Associate Clinical Professor
Occupational & Environmental Health
UC Irvine



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Chief Executive
Singapore International Chamber
of Commerce



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Founder & Chair
The Employee Mobility Institute



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Health & safety
Writer, editor and consultant



Franck Baron
Chairman
PARIMA



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Vice Chairman
U.S. Preventative Medicine



Dr Rachel Lewis
Director
Affinity Health at Work



Jason Smith
Director
Risk Management Institute of Australasia

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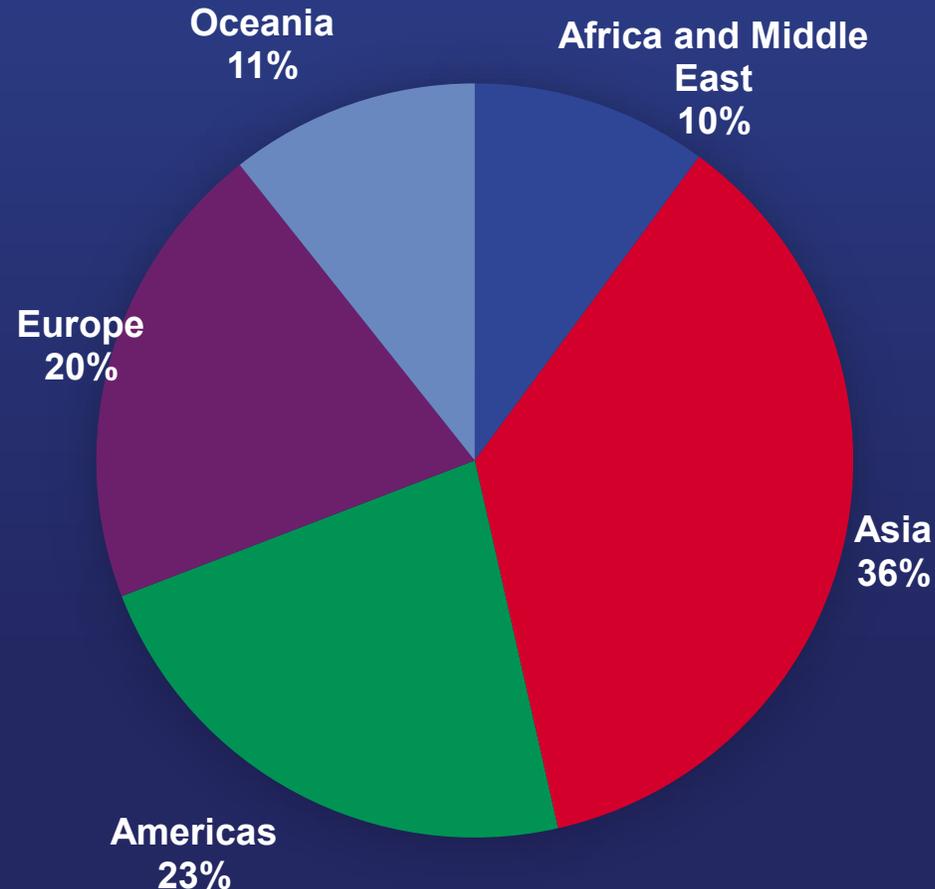
On-the-ground Health & Security
Intelligence Network

1,400 senior risk decision-makers

responsible for:

- domestic employees
 - assignees
 - remote workers
- business travellers
- students and faculty

Across 99 countries



RESEARCH PILLARS

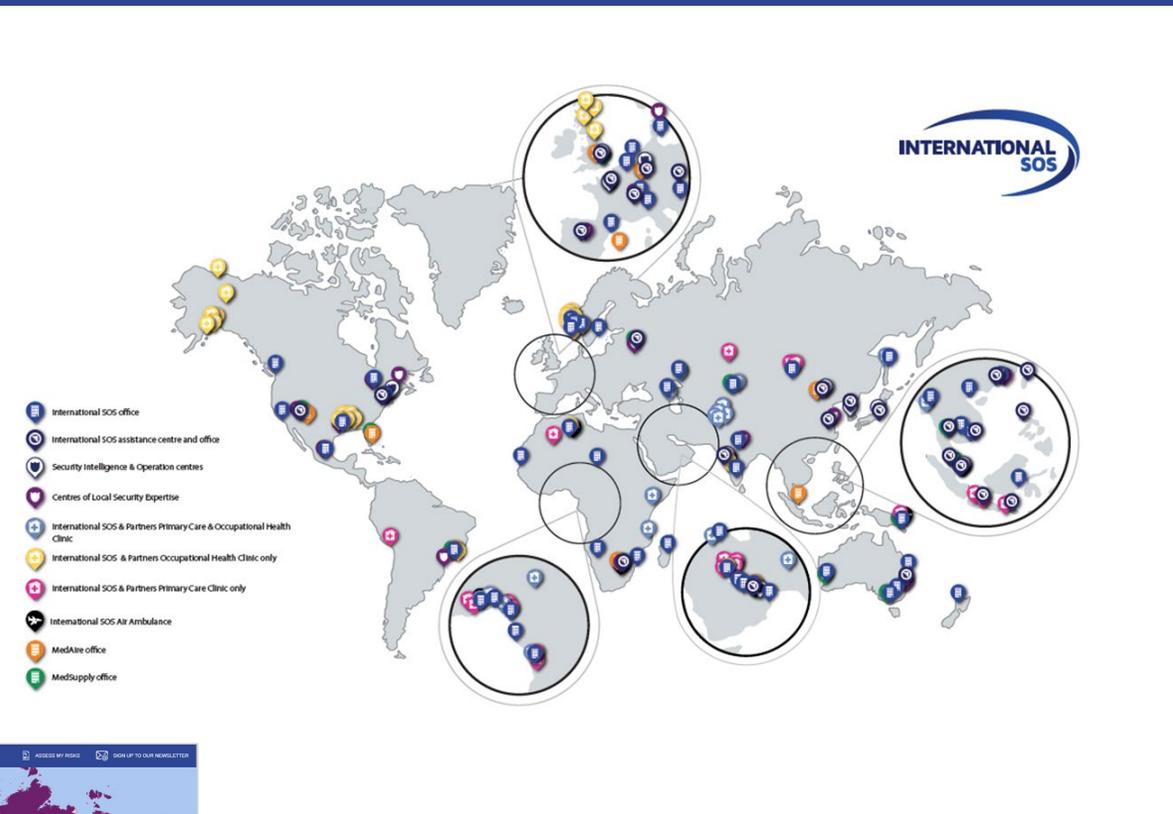
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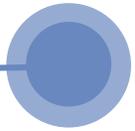
**On-the-ground Health &
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FIVE PREDICTIONS FOR

2021





WORKFORCE RISK PERCEIVED TO BE AT 5 YEAR HIGH AND EXPECTED TO INCREASE IN 2021

Business Resilience Trends Survey

% say travel risks have increased in 2020



AND THE FUTURE IS UNCERTAIN:

over half of risk professionals (55%) believe that health and security risks faced by employees will increase further in the next year



TOP FIVE OPERATIONAL CHALLENGES FOR ORGANISATIONS IN 2021

Business Resilience Trends Survey

1



54%

Having adequate resources to deal with COVID-19

2



40%

Access to accurate & timely information on health and security risks

3



35%

Educating employees about risks

4



33%

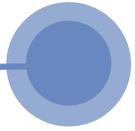
Dealing with mental health issues

5



33%

Communicating during a crisis



EVACUATIONS RISK

Business Resilience Trends Survey

INTERNATIONAL
SOS



73%

COVID-19
medical
reasons



31%

Border
closure



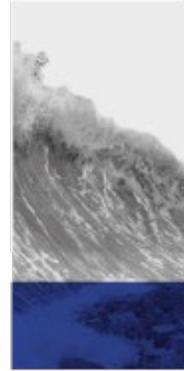
26%

Returning
employee
to home
country



25%

Security
threats



21%

Natural
disaster





THE PRODUCTIVITY GAP 2021

Business Resilience Trends Survey



TOP FIVE EXPECTED CAUSES OF EMPLOYEE PRODUCTIVITY DECREASES IN 2021

91%

infectious diseases (COVID-19, malaria, dengue, Ebola, Zika etc.)

32%

country risk rating

32%

transport concerns

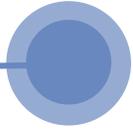
30%

security threats

30%

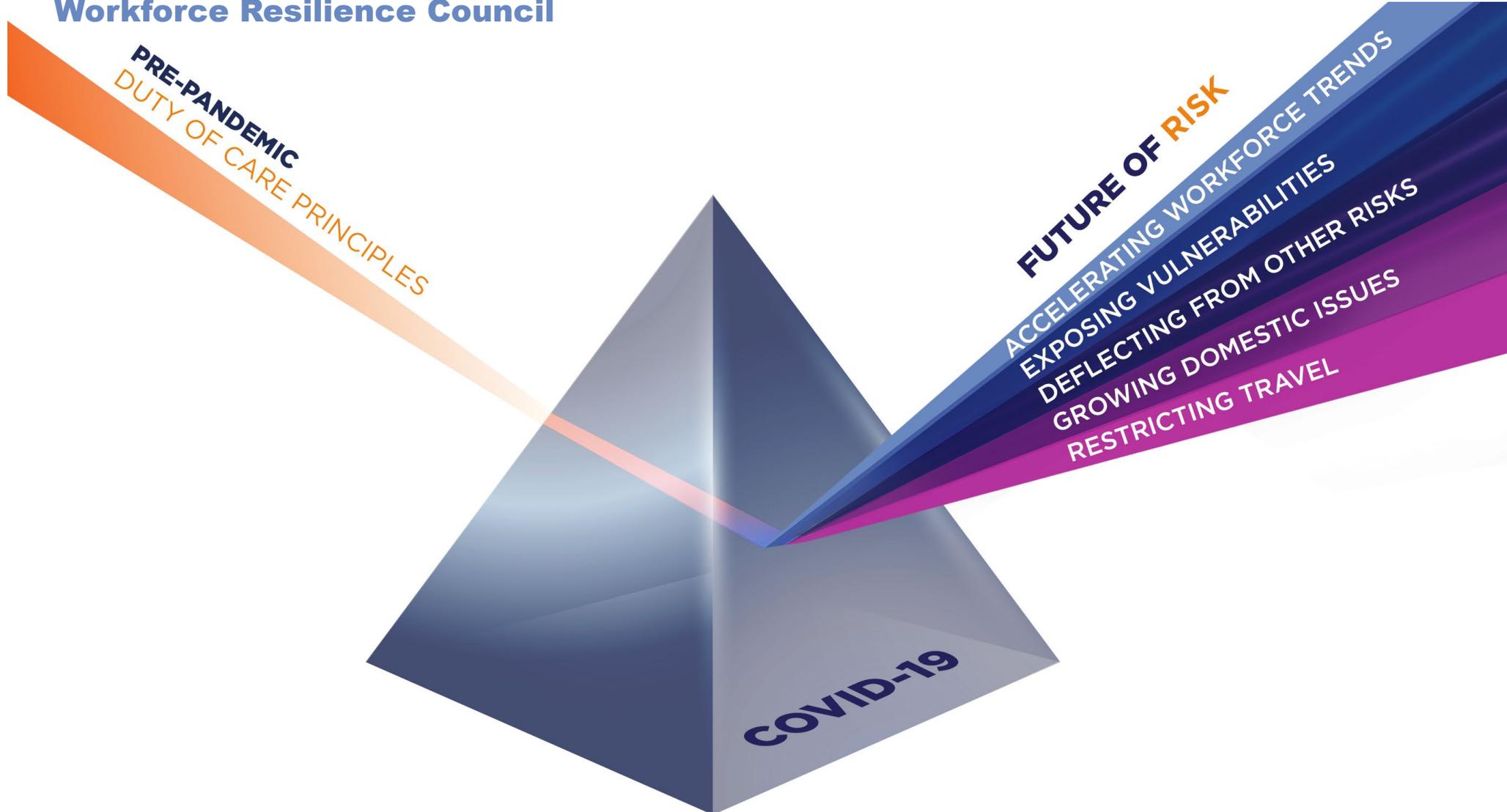
mental health issues

More than a fifth also cited 'geopolitical threats' and 'civil unrest' as key causes.

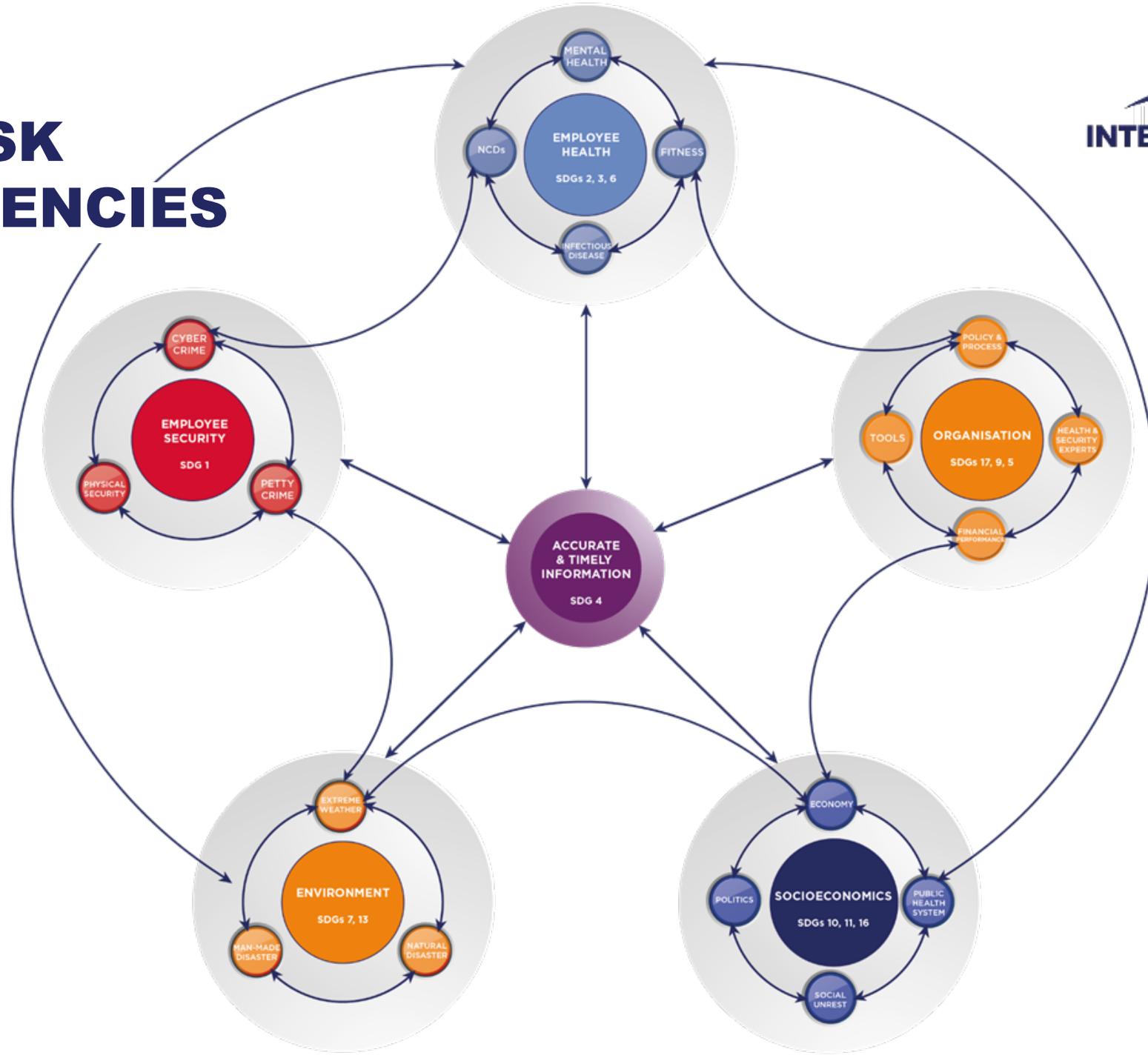


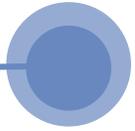
COVID-19 HAS BECOME THE PRISM THROUGH WHICH MOST FUTURE RISKS ARE SEEN

Workforce Resilience Council

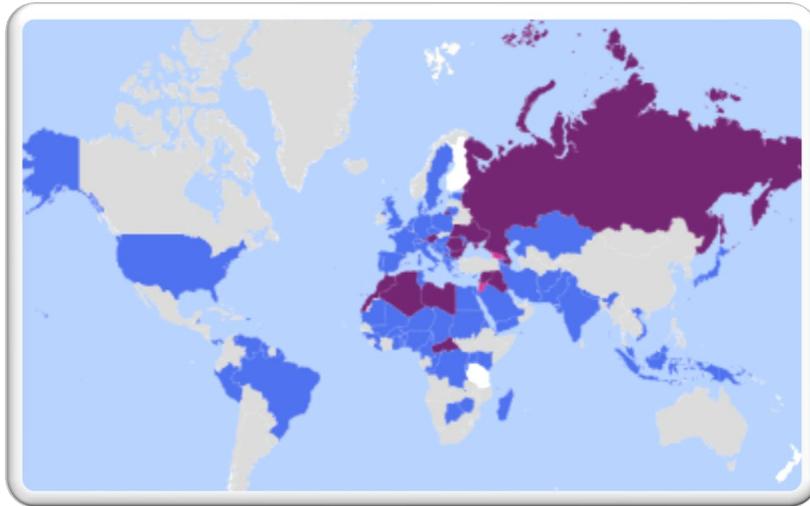


2021 RISK DEPENDENCIES

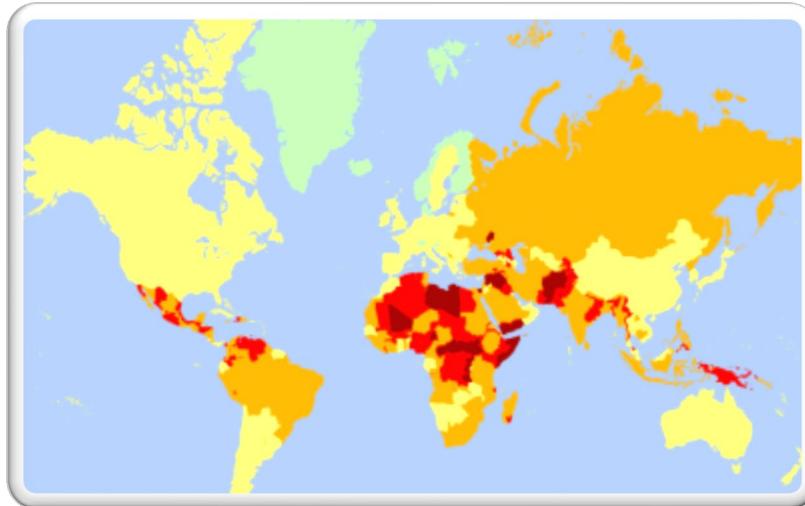




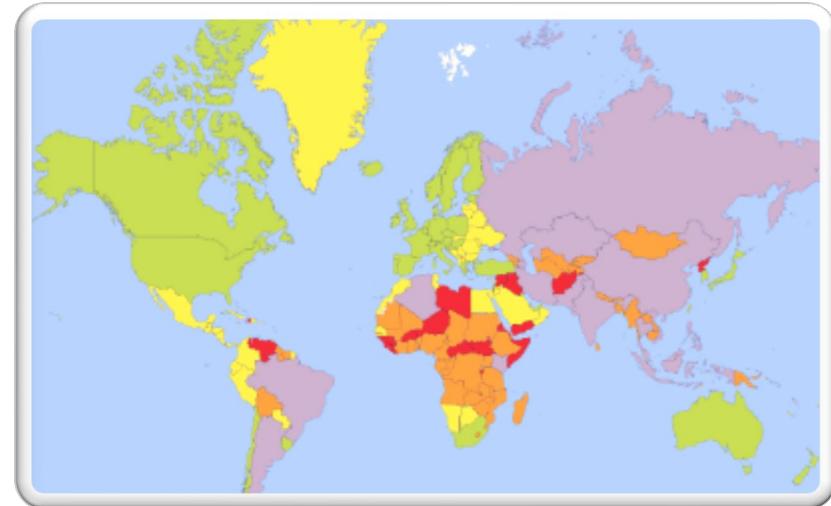
COVID-19 IMPACT SCALES AND UNDERLYING MEDICAL & SECURITY RISKS



COVID-19 impact scale

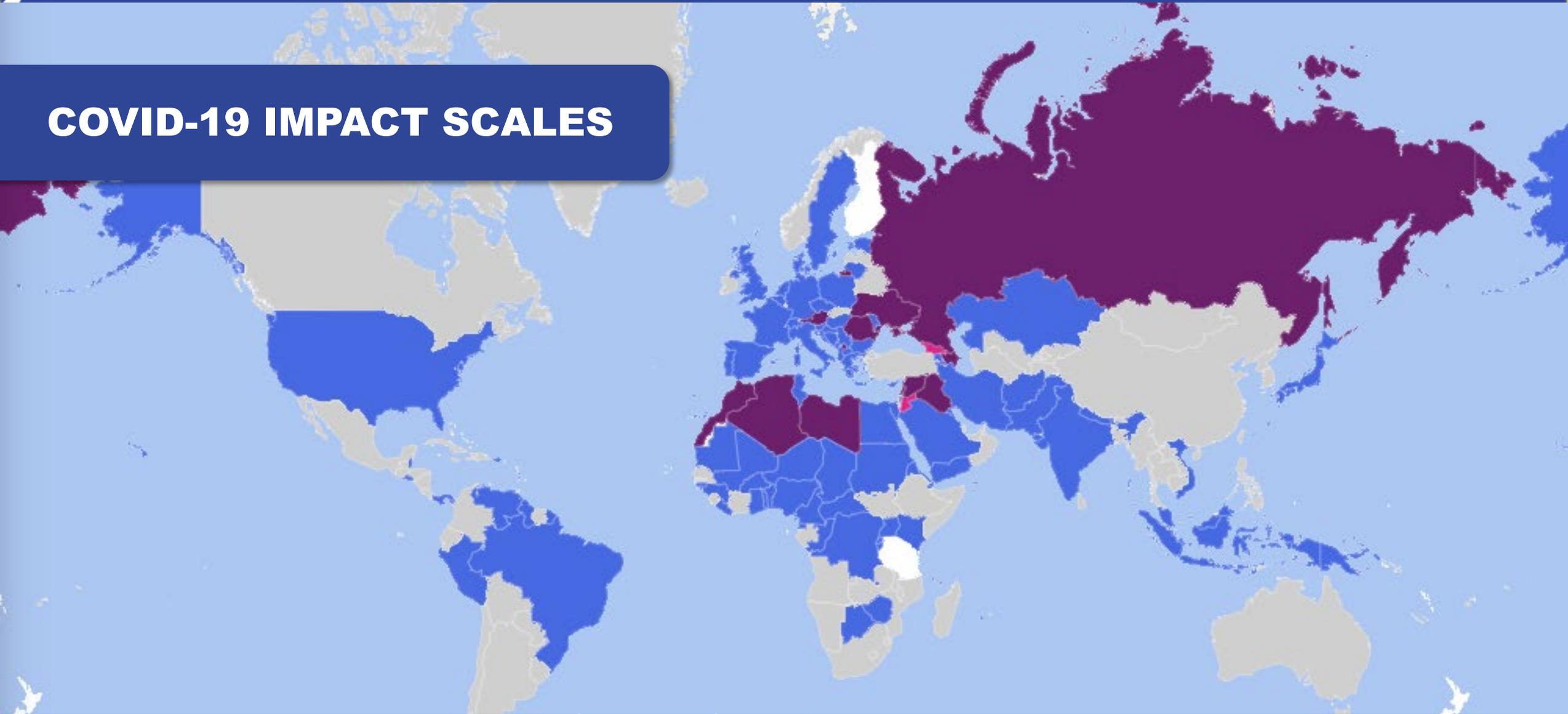


Security risk rating



Medical risk rating

COVID-19 IMPACT SCALES



YOUR PLACES



COVID-19 INBOUND TRAVEL



COVID-19 DOMESTIC OPERATIONS



MEDICAL



SECURITY

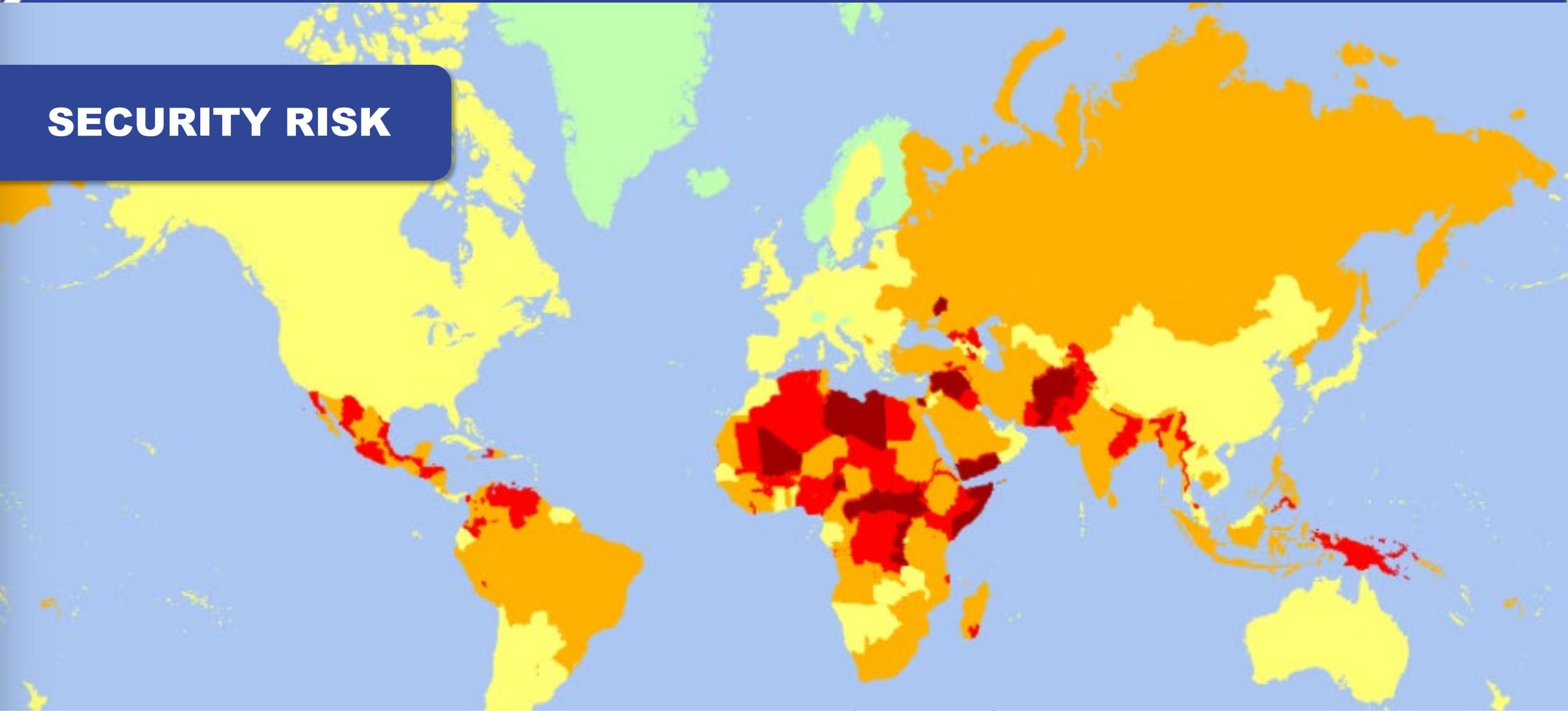


ROAD SAFETY



NEWSROOM

SECURITY RISK



YOUR PLACES



COVID-19 INBOUND TRAVEL



COVID-19 DOMESTIC OPERATIONS



MEDICAL



SECURITY

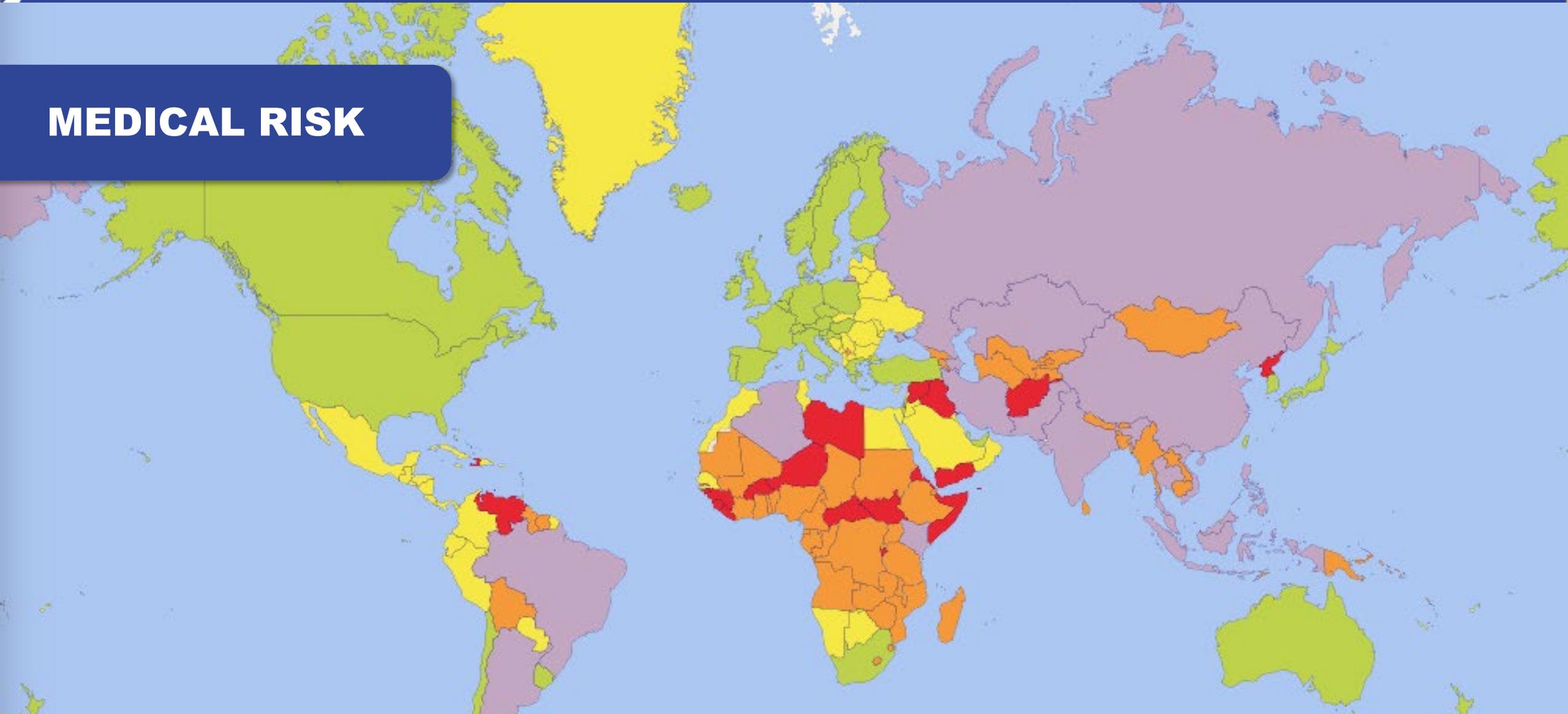


ROAD SAFETY



NEWSROOM

MEDICAL RISK



YOUR PLACES



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MEDICAL



SECURITY



ROAD SAFETY



NEWSROOM

TOP FIVE RISK OUTLOOK 2021 PREDICTIONS

1

Ecopolitical turbulence will exacerbate tensions, civil unrest and crime

2

Pandemic borne crisis management teams will redefine Duty of Care practices

3

The growing infodemic will increase demand for trusted sources of health & security information and advice

4

Mental health issues will be a primary productivity disruptor

5

Singular focus on COVID-19 will create risk blind spots



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