

# THE GLOBAL MOBILITY CHECKLIST FOR ORIGINAL EQUIPMENT MANUFACTURERS

- An 8 step blueprint for seamless and  
compliant deployment

by



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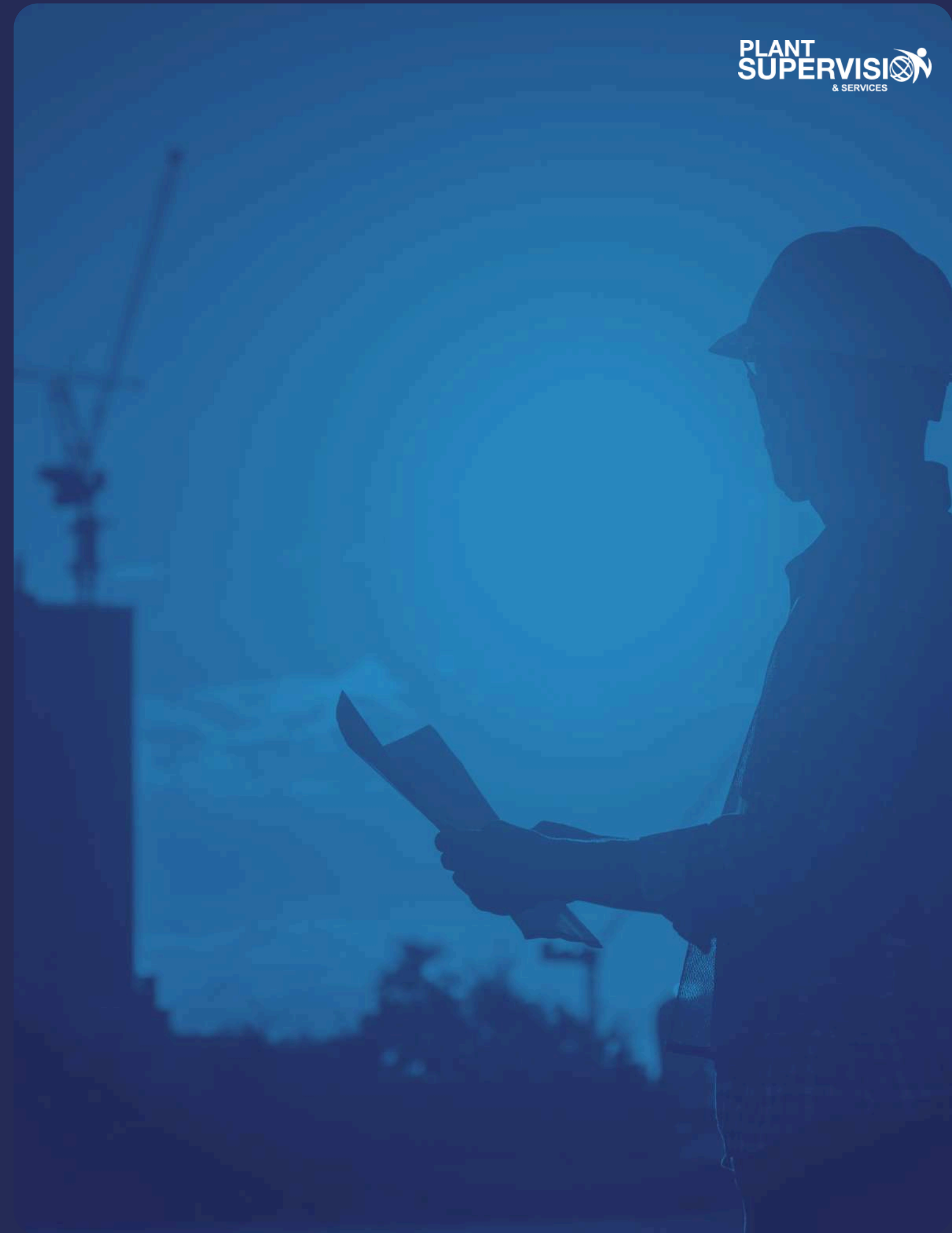


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# Introduction

In the heavy and technical industries, Original Equipment Manufacturers (OEMs) deploying their supervisors, engineers etc. across borders face increasingly complex challenges.

This white paper provides an in-depth exploration of the 8 key areas of global mobility crucial for project managers responsible for deploying personnel across borders.

Project managers must ensure timely, compliant workforce mobility to meet project goals without delays. In addition, aspects like insurance, site access, and social contributions play a crucial role in ensuring employee safety, project continuity, and legal compliance across different regions.

*"For OEMs in the heavy and technical industries, this white paper serves as a comprehensive guide to overcoming global mobility challenges, ensuring a seamless workforce deployment, reducing risks, and driving successful international project execution."*

*Project managers and coordinators will gain valuable insights into implementing best practices, promoting workforce well-being, and supporting their company's global growth."*



Kasper Munkholm  
Head of Projects and Partner



This paper covers the following critical topics:

- |                       |                              |
|-----------------------|------------------------------|
| 01 Work permits       | 05 Employee taxation         |
| 02 Insurance          | 06 Emergency plans           |
| 03 Local registration | 07 Travel and accommodations |
| 04 Payroll            | 08 Site access               |



# 1. Work Permits

- A critical first step

We start with work permits which are a critical step before deploying technical personnel like supervisors, engineers, site managers, and technicians across borders. For OEMs, the challenge lies in securing the right permits within the constraints of project timelines and regulatory requirements.

## Educational level

Many countries require specific formal education levels for work permit approvals, often a bachelor's degree or higher in the relevant field.

For instance, the U.S. has strict academic qualification requirements for H-1B or L-1 visas, while Australia requires qualifications under its Skilled Occupation List.

However, technical workers like welders and mechanics may possess extensive hands-on skills and certifications without a formal degree. This gap can lead to rejected applications and project delays, creating a mismatch between skill-based needs and policy requirements.

## Alignment with project timelines

Securing work permits in alignment with project timelines is equally important for ensuring smooth equipment installation.

For instance, an engineer may arrive on-site with the right permit, ready for the commissioning phase, but if the project is delayed, it could lead to unnecessary costs and the risk of the permit expiring before the job is completed.

## Lengthy approval process

With the growing complexity of global mobility, the application processes for work permits have become increasingly time-consuming.

Countries like the U.S. or Canada, which rely on permits such as the B1 Aftersales and the CETA, often experience backlogs, with approvals sometimes taking months. This prolonged processing period can disrupt project timelines, leading to increased costs and stalled operations.

Given the intricate regulations, varying qualifications, and long processing times, it is crucial to implement targeted strategies that streamline the work permit process.

## Solutions and best practices

Provide comprehensive letters of support to compensate for employees' lack of formal education, highlighting internal certifications and work experience.

Align work permits with project timelines to prevent delays and additional costs.

Consider alternative permit types, such as short-term or project-based permits, to bypass lengthy processing.

Engage with legal consultants who understand immigration for technical roles to navigate complex requirements effectively.

## 2. Insurance

### - The next essential step

Once work permits are secured, ensuring proper insurance coverage is the next essential step for safeguarding your team and operations.

The right insurance coverage is crucial for OEMs in the heavy and technical industries, where high-risk environments and valuable equipment are involved. The right insurance goes beyond simple compliance; it provides crucial protection of your equipment and mitigates financial loss.

### Industry-knowledge matters

While many companies use Employer of Record (EOR) services to handle insurance, these providers may lack the deep understanding of the technical industry needed to address specific risks like supply chain disruptions or on-site hazards.

*"One gap we often see is EORs not including working at heights or in confined spaces. This can leave your company exposed to gaps in coverage."*



Asbjørn Vollmer Jeppesen  
Head of Legal

### Tailored insurance

Tailoring insurance coverage to account for industry-specific risks ensures comprehensive protection, covering potential incidents effectively and safeguarding the company's operations and financial stability.

With rising BI costs, complex claims due to global supply chains, and the need to respond to emerging risks in technical industries, working with insurance partners who deeply understand the sector is one of the keys to securing adequate coverage.



## Solutions and best practices

Conduct a comprehensive risk assessment of work environment hazards, political stability, health and security risks. Verifying local insurance requirements is also crucial for compliance. Site-specific risks or political instability may require specialized insurance from third-party providers.

Partner with a global mobility company specific knowledge about the unique intricacies of your industry.



### 3. Local registration

- Navigating the challenges of local registration

After addressing the complexities of insurance, OEMs must also navigate the challenge of local registration.

In many countries, employees working on short-term or long-term projects must register locally.

Local registration can involve securing work permits, registering with tax authorities, and complying with employment laws such as mandatory social security contributions. Failure to complete these registrations properly can result in penalties, fines, or even denial of entry to work sites.



#### Varying local requirements

Local registration requirements vary significantly between countries, often influenced by factors like the length of stay, type of work, and the employee's nationality.

For instance, in certain countries, registration is needed before arrival and may require proof of local housing, tax identification, and specific work authorizations.

For project managers, this introduces logistical challenges—managing registration timelines, understanding local laws, and ensuring employees have the correct documents, especially in regions with complex bureaucratic processes.

*In some countries, like France, you need a SPSI notice, to let authorities know, that your employee will arrive."*

Kasper Munkholm  
Head of Projects and Partner

#### Solutions and best practices

Some sites might be able to help you understand specific requirements, but normally they don't want to take responsibility for any misinformation.

Collaborate with an EOR/global mobility partner who has experience with local registration in the specific country

## 4. Payroll

### - Managing payroll

With local registration complete, the focus shifts to managing payroll.

Payroll management becomes more challenging when deploying employees across borders. A global payroll survey revealed that 45% of companies cite compliance as the most significant challenge in managing payroll. The diversity in tax laws, reporting regulations, and local payroll systems across countries adds layers of complexity to the task.

For instance, some host countries may require employees to have both local salary and expense accounts, which complicates the payroll process. If salary and expenses are not separated correctly, employees might face personal taxation on otherwise tax-free benefits like housing allowances.

Additionally, local payroll requirements often mean working with a partner in the host country to ensure proper payments and tax reporting.

### Flexibility is key

Many companies also collaborate with an EOR to handle payroll, but this can involve re-hiring employees, which may impact their seniority or pension. Ensuring that these transitions are seamless is essential to maintaining employee satisfaction.

Working with traditional EOR companies unfamiliar with the heavy and technical industries can also introduce unique challenges. These providers often rely on rigid payroll systems that lack the flexibility to accommodate industry-specific factors like project delays or fluctuating overtime requirements.

This inflexibility can become an issue when projects are postponed or rescheduled, but EOR providers still process payroll based on the original start date.

As a result, companies may end up paying employees for time when no work is being performed, leading to unnecessary salary payments and increased costs.

45%

of companies cite compliance as the most significant challenge in managing payroll.\*

\*Dayforce, Payroll Insight 2024

### Solutions and best practices

Map all the potential areas that requires flexibility such as payroll, overtime, day rates vs. hourly rates, and ensure that you EOR global mobility partner understands the dynamic nature of your industry, and ensure that they can accommodate your demands.



# 5. Employee taxation

- Addressing the issues of employee taxation

Employees working abroad may face double taxation if both their home and host countries claim taxing rights over their income.

The 183-Day Rule is a common trigger for tax residency, where employees who spend more than 183 days in a host country may be subject to that country's tax laws.

However, tax residency can also be influenced by other factors, such as family ties or the nature of the employee's work.

While Double Taxation Agreements (DTAs) between countries exist to prevent this scenario, careful planning is needed to ensure employees do not face double taxation.

## Avoid double contributions

In addition to income tax, employees may also be required to contribute to both home and host country social security systems.

Totalization agreements help avoid these double contributions, allowing employees to remain covered under their home country's system during international assignments, but these agreements are not always in place between countries

Lastly, the taxation of employee benefits—including housing, travel allowances, and bonuses—varies widely between countries.

Misunderstanding local regulations can lead to unexpected tax liabilities, making it crucial for companies to plan for benefit taxation before deploying employees

*"By proactively managing tax treaties, social security contributions, and benefit taxation, OEMs can mitigate tax risks for their internationally mobile employees."*

- Asbjørn Vollmer Jeppesen  
Head of Legal

## Solutions and best practices

Ensure employees understand and utilize DTAs to minimize tax liabilities. Obtain necessary certificates of tax residency before deployment.

Explore totalization agreements to avoid double contributions. In countries without such agreements, factor in additional costs for both the employer and employee.

Engage with tax professionals familiar with cross-border employment taxation to navigate the complexities of benefit taxation and income reporting requirements in the host country.



## 6. Emergency plan

### - Prioritizing employee safety

In addition to financial considerations like taxation, OEMs must prioritize employee safety.

With construction having one of highest reported workplace injuries and illnesses, having a comprehensive emergency plan is not just recommended—it's critical.

Moreover, an emergency plan is also important in cases of natural disasters and equipment failures.

For HSE management in the heavy and technical industries, where hazardous environments are common, ensuring the safety of your deployed employees requires detailed planning and clear communication during emergencies.

### Key challenges

One of the key challenges in emergency preparedness is defining who is responsible for handling various aspects of an emergency, especially when working with a global mobility partner. In high-risk industries, any delay or confusion during a crisis—whether it's a physical injury, equipment failure, or natural disaster—can lead to severe consequences.



It's crucial that all parties, including your mobility partner, understand their roles in managing incidents.

If the partner provides insurance or health coverage, they must act as the primary contact and immediately notify your company of any issues, allowing for coordinated responses.

### 24/7 emergency hotline

Many global mobility companies operate only during standard business hours, which can create issues when emergencies arise outside these times.

In the event of urgent medical approvals or coverage confirmations, it's crucial to ensure your employees have access to a 24/7 emergency hotline. This kind of around-the-clock support is just one of the solutions that can make all the difference when quick decisions are needed, ensuring the safety and well-being of your team, no matter the time zone or situation.



## Solutions and best practices

Identify the key decision-makers and ensure everyone is aware of their roles in case of an emergency. Regularly train employees to ensure clarity during critical moments.

Customize your emergency response plans for each deployment site, accounting for unique risks like extreme weather, natural disasters, or political instability.

Align your emergency protocols with your global mobility provider. Clarify their responsibilities in cases of physical injuries, equipment breakdowns, or other incidents. It is important that your partner has experience with emergency plans in the technical industry which includes a 24/7 hotline.



## 7. Site Access

- Get access to industrial sites

Preparedness extends beyond emergencies. Gaining secure access to industrial sites presents unique challenges, particularly in industries with strict security and safety requirements.

Site access requires meeting a variety of regulations specific to each location, from security clearances to legal compliance.

For example, some sites may require background checks, Health, Safety, and Environment (HSE) training, or local documentation.

A common issue is that local requirements may include documentation that cannot be easily issued to foreign workers, leading to delays.

Additionally, when OEMs rely on subcontractors without employment ties, it can result in a situation where the OEM gains site access but their subcontractors do not.

*"To mitigate risks, early planning and engagement with local authorities are essential to avoid costly delays and ensure smooth site access."*



Kasper Munkholm  
Head of Projects and Partner

### Site-specific regulations

Site-specific regulations often require early and thorough planning to navigate the diverse documentation and compliance processes.

For example, engaging with local authorities and regulatory bodies well before deployment ensures that access is granted in a timely manner.

Delays in gaining site access can significantly impact project initiation and timelines, potentially leading to cost overruns.

## Solutions and best practices

Establish communication with local authorities, regulatory bodies, and other stakeholders to understand site-specific requirements.

Ensure all employees meet necessary site documentation, training, and compliance needs.

Align project timelines with site access requirements to avoid delays. Present deadlines to end-clients that factor in access lead times.

# 8. Travel and accommodation

- Getting your personnel abroad

With site access established, the next priority is managing the logistics of travel and accommodation.

Managing travel and accommodation for OEM supervisors, engineers, site managers, and technicians poses significant challenges in cross-border deployments.

A 2024 poll found that 59% of travel buyers expect increased travel, with 66% concerned about rising costs.

Many OEMs also rely on EORs for this task, but it's essential to ensure alignment with company policies. There can potentially be clear policies on travel class, transportation methods (like the use of Uber), hotel choices, and safety zones that needs to be taken into account.

## Alignment of travel arrangements

Ensuring that all travel arrangements align with company policies is critical to controlling costs and maintaining compliance.

By clearly defining, OEMs can mitigate unexpected expenses and ensure consistency across deployments.

To navigate these challenges effectively, companies need to adopt best practices that streamline the travel process and maintain alignment with operational goals.

A 2024 poll found that 59% of travel buyers expect increased travel, with 66% concerned about rising costs.\*

\*GBTA, 2024

## Solutions and best practices

Define policies for travel class, accommodation standards, and transportation options that are aligned with budget and compliance needs. This ensures employees have clear expectations and reduces the risk of inconsistent travel arrangements.

Team up with partners that offer centralized management of bookings and can provide cost-effective solutions while staying within company guidelines.



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## Conclusion

As global mobility continues to play a vital role in the growth and success of OEMs, project managers must be proactive in ensuring that their workforce deployment strategies are seamless and compliant.

The challenges of managing **work permits, travel, site access, insurance, payroll, and emergency plans** require well-coordinated solutions tailored to the technical industry.

By assessing your current mobility practices and adopting the best practices outlined in this whitepaper, you can mitigate risks, reduce delays, and improve the efficiency of your operations.



# Time To Take Action

Start by evaluating how flexible your current processes are in handling the unique demands of your future projects. Consider collaborating with mobility partners that understand the complexities of your industry and can offer customized solutions that align with your business goals.

From securing the right permits to optimizing payroll management, every step contributes to the success of your projects and the safety and satisfaction of your deployed workforce.


In a world where global mobility is more crucial than ever, OEMs that invest in robust, flexible mobility practices will be better positioned to seize new opportunities, expand into emerging markets, and support long-term growth.

Embrace these best practices to not only navigate the challenges of cross-border operations but to thrive in a competitive, fast-evolving global landscape.

Please don't hesitate to contact us if you have any questions.




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