

Staff Global Mobility Policy

Summary

The Staff Global Mobility Policy outlines support, responsibilities and expectations that enable the University to manage the risk related to foreign employment compliance obligations, which is created when staff travels for work overseas.

Control information:	Control detail:
Owner	Head of HR Central Services, Interim Director of Organisational Development, Human Resources
Author	Staff Global Mobility Manager, Human Resources
Sponsor	Chief Operating Officer and Registrar, Senior Team
Consulted	Research Committee (Trade Unions informed)
Approved by	Senate; University Planning and Resources Committee (UPARC), University Executive Committee (UEB)
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Contents

Staff Global Mobility Policy	1
1. Updates to this policy	5
2. Introduction	5
3. Scope	5
4. Definitions	6
5. Summary responsibilities	7
6. The importance of planning	8
7. Employment rights	9
8. Working permissions	10
Passports	10
Visas	10
9. Insurance	11
10. Travel	12
Booking	12
Airport transfer	13
Accommodation	13
Driving overseas	13
11. Income tax & social security	14
University obligations – UK	14
University obligations – Overseas	14
Staff obligations – UK	15
Staff obligations – Overseas	15
12. International payroll	17
13. Pensions	17
14. Expenses	18

15.	Health, safety & security	18
	Risk assessment	18
	Vaccination and medication.....	19
16.	Communication	20
	Itineraries	20
	Maintaining contact	20
17.	Intellectual property.....	20
18.	Data protection.....	21
19.	Bribery Act 20210 & Modern Slavery Act 2015	21
20.	Roles & Responsibilities	22
	Staff working overseas:	22
	Head of School / School Manager.....	23
	Deans / Pro Vice Chancellor Research / University Executive Board (UEB).....	23
	Staff Global Mobility Support Group (HR, Finance, Safety & Health, Insurance, Payroll & Tax):	24
	Third party specialists (various suppliers)	24
21.	Funding.....	25
	Research funding	25
	School funding	25
	Professional services support	26
	Overseas worker	26
22.	Further advice	26

1. Updates to this policy

- 1.1. This policy has been updated to align to the new University of Bristol policy management framework.

2. Introduction

- 2.1. Internationalisation is an intrinsic part of the University of Bristol's operation and strategic ambition.
- 2.2. This policy is in response to statutory requirements and the University's duty of care for staff working in international environments. It aims to comply with both UK and host country laws, while also supporting staff in managing the practicalities and risks associated with working abroad.

3. Scope

- 3.1. The purpose of this policy is to:
 - a. Help members of staff, their manager and school plan effectively when working overseas.
 - b. Mitigate the risk to the health and safety of staff working overseas.
 - c. Ensure that risks derived from employment compliance obligations are assessed and mitigated in advance of, and during, travel overseas.
- 3.2. This policy does not apply to individuals coming to work in the UK from abroad, unless it is part of a structured multi-country fellowship/scholarship.
- 3.3. This policy does not apply to travel in relation to a study programme and it does not cover travel by those with visitor or honorary status.
- 3.4. All overseas working arrangements need to be assessed and approved using the [Overseas Working Approval Process \(PDF, 153kB\)](#) before work takes place. Unauthorised working overseas will be reviewed on a case-by-case basis and would usually require consideration to [Conduct Procedure: Ordinance 10, section 4](#) which could result in disciplinary action.
- 3.5. This policy applies to all University staff who work overseas, whether on a temporary or permanent basis, and covers all overseas working arrangements,

including research, teaching, and administrative duties, but does not cover students, visitors, or those travelling abroad for short-term conferences or events.

4. Definitions

- 4.1. **Staff Global Mobility:** The University's support framework for staff working abroad, ensuring compliance with tax, social security, and employment laws.
- 4.2. **International Payroll:** A payroll system used to process salaries and tax compliance for employees working in different countries.
- 4.3. **Long Term Assignment:** Arrangements that usually last 12 months or more. Full consideration should be given to this policy and as a minimum an annual review should take place to establish whether any tax, social security, insurance, employment rights and visa issues have emerged or require further consideration because of the length of engagement.
- 4.4. **Member of staff:** Throughout this guidance document the individual working abroad will be referred to as member of staff whose appropriate manager will usually be a Line Manager, a Head of School, a Principal Investigator or an individual with responsibility for supervising/maintaining communication with the member of staff whilst they are overseas.
- 4.5. **Overseas working:** The term overseas working typically encompasses, although not exclusively, staff working for more than 1 month: in foreign universities (either off or on campus) carrying out research in the field; teaching, paid research leave, working from home where their residence is abroad. Staff that undertake business travel for less than 1 month should familiarise themselves with this policy and focus on requirements for immigration, safety, security, health, insurance and maintaining communication.
- 4.6. **Official Business:** Travelling on official business trips for less than 1 month for activities such as conferences, meetings, attending seminars & lectures, whereby you are representing the University of Bristol.
- 4.7. **Payment in Lieu of Pension (PILOP)** – A financial allowance replacing employer pension contributions for staff ineligible for their UK pension scheme due to overseas work.

- 4.8. **Short Term Assignment:** Arrangements that usually last between 1 – 12 months. Full consideration should be given to this policy, although the amount of planning time may be greatly reduced depending on the destination, duration and nature of work.
- 4.9. **Unofficial Business:** Travel where the host organisation invites you to attend an event and pay for your travel and you are not formally representing the University of Bristol. Consideration should be given to the activity and whether this is considered personal or perceived representation on behalf of the University of Bristol by the host. If the latter, then staff are acting in the interests of the institution, carrying the normal expectations of their role and would need to give full consideration to this policy. Equally line managers retain their duty of care for staff travelling or working abroad.
- 4.10. **Visitors Contract:** An agreement that academic staff may be required to sign when based at a host institution, potentially affecting intellectual property rights.

5. Summary responsibilities

- 5.1. Detailed responsibilities can be found in [Roles and Responsibilities \(section 20\)](#).
- 5.2. **Staff Working Overseas:** Plan and manage their overseas work, ensure compliance with tax, social security, and legal requirements, and maintain appropriate communication with their manager. Ensure health and safety, manage risks, and follow all relevant policies and guidance.
- 5.3. **Head of School/School Manager:** Review costs and risks related to overseas working, approve arrangements in collaboration with relevant teams, and ensure staff are properly supported throughout their overseas assignments. Oversee risk assessments and ensure the staff member's health and safety while abroad.
- 5.4. **Deans/Pro Vice Chancellor (PVC) Research/University Executive Board (UEB):** Make decisions on high-risk overseas working arrangements and escalate cases that may affect the University's reputation or legal standing, particularly those in high-risk areas. Ensure all procedures comply with the University's policies and statutory requirements.

- 5.5. **Staff Global Mobility Support Group (HR, Finance, Safety & Health, Insurance, Payroll & Tax):** Provide expert guidance on tax, social security, insurance, safety, and other logistics for staff working overseas. Assist with necessary paperwork, offer tailored advice, and support staff and managers throughout the overseas assignment process.
- 5.6. **Third-Party Specialists:** Offer specialised advice and services, including international payroll, legal requirements, and safety measures, depending on the complexities of the overseas assignment. Provide expert support on compliance, insurance, and tax matters in host countries.

6. The importance of planning

- 6.1. Overseas initiatives can lead to increased risks and costs to both the member of staff the school and to the University if not planned properly, for example, disputes with collaborative partners, legal challenge from staff and students, regulatory action from overseas authorities and reputational damage to an institution's global brand. Faculty HR and Finance Business Partners should be notified at the earliest opportunity within the planning stage, i.e. at the point of applying for a grant or when a resource requirement is identified.
- 6.2. Staff who are due to work abroad should identify a colleague of appropriate seniority who will work with them to ensure that risks have been properly assessed and that there is sufficient budget to meet related costs including, but not limited to, financial advice, additional insurance, tax and social security and personal expenses. The appropriate manager will act as the primary point of contact should the individual have any concerns or questions for the duration of their work overseas.
- 6.3. At the start of the planning phase for any work-related travel outside of the UK, members must contact the Staff Global Mobility team (staff-globalmobility@bristol.ac.uk), who might request that an Overseas Working Questionnaire be completed. This form captures details such as destination, duration and nature of the trip. This information will then be assessed centrally, and advice will be issued to the member of staff and school to ensure staff and the University remain compliant. As the assessment is based on both individual

circumstances and country specific legislation, it is important that the staff member details all countries they will be working in, as well as time spent within each country. The Staff Global Mobility team will liaise with the member of staff and the school to make any necessary arrangements where required.

- 6.4. Staff are encouraged to view the latest travel advice for countries at <http://www.gov.uk/foreign-travel-advice>. This essential travel information is regularly updated and can rapidly change.
- 6.5. This policy should be read in conjunction with the:
 - a. [Outside Work policy](#)
 - b. [Travel and Expenses policy](#)
 - c. [University's insurance webpage](#)
 - d. [Working offsite health and safety guidance](#)
 - e. [Anti-corruption and bribery webpages](#)
 - f. [Modern Slavery Statement](#)
 - g. [Research Governance & Ethics Policies](#)

7. Employment rights

- 7.1. Staff working overseas may gain or lose employment rights based on the legislation of the country they are working in and their individual personal circumstances. Any further questions around this should be directed to the Faculty HR Business Partnering Team or Staff Global Mobility Manager.
- 7.2. As a general rule, employment law and employment rights applicable to overseas working are based on the employment law of the land in which the work is taking place. The University where possible will look to continue contractual terms and conditions in the UK. Where legislation is more beneficial or prescribes that organisations cannot provide more, the HR Team will need to issue a contract addendum which clearly states a variation in contractual terms.
- 7.3. The University may have a legal requirement to issue a contract in the language of the host nation or in the native language of the employee. This is likely to require

planning and additional cost in requesting the contract translation from a third-party supplier. This additional cost should be met by the school. For example, a contract in Belgium needs to be issued in the regional language which could be Dutch, German or French depending on the location. Many middle eastern countries require Arabic contracts to be issued.

- 7.4. Some countries require foreign organisations and/or workers to establish a subsidiary organisation or incorporate in order to provide a service or trade. This can create corporation and VAT liabilities for the University. If the member of staff is teaching, there is a higher than average risk of a taxable presence being created. Such an arrangement should not be entered into lightly and will require consultation with Staff Global Mobility and the Head of Tax and approval by the University Executive Board, which may make the work unviable.

8. Working permissions

Passports

- 8.1. Staff are responsible for making sure that their passports are valid for the duration of their time working abroad and still have 6 months or more until the passport expires when they travel.
- 8.2. The UK Government provide UK citizens with [comprehensive online advice](#) and guidance with regard to passport requirements and it is recommended that staff familiarise themselves with this guidance before planning work abroad. Similarly, it is recommended that individuals who are not UK citizens check their home country's website for appropriate guidance.
- 8.3. Individuals may wish to consider applying for a second passport in order to avoid delays relating to multiple visa applications or when visiting countries that are politically incompatible.

Visas

- 8.4. Staff should check whether visas are required for their nationality in destination countries and are responsible for arranging their own visas.
- 8.5. The University's appointed travel-management company can assist staff in obtaining visas if given sufficient notice (not less than four weeks). Staff should

consider any immigration or visa requirements which must be satisfied for staff, and their families, to travel and work overseas. The process involved in applying for clearance can be time-consuming, with obstacles commonly arising along the way, and its success will depend upon the nature of the assignment and the employee's personal and family circumstances. Starting this process as early as possible, and seeking expert support in completing the relevant paperwork, can assist in ensuring its successful and timely completion.

- 8.6. Staff may be eligible to reclaim standard visa costs using the [Travel and Expenses Policy](#) via the [expenses process](#).

9. Insurance

- 9.1. Staff are only covered by insurance if the member of staff or appropriate manager complete an online travel application. If you are unsure whether your personal travel insurance covers your overseas arrangement, check on the [University's Insurance webpage](#) or contact the University Insurance Manager at the earliest opportunity to check whether adequate insurance is in place or whether additional cover is required.
- 9.2. The University holds Personal Accident Insurance that pays a lump sum of up to three times the member of staff's salary in the event of accidental death or permanent disablement of a member of staff in the course of University business. This includes accidents overseas which occur when on University of Bristol business.
- 9.3. The University also holds Employers Liability Cover as required by UK law. This covers the University's legal liability for staff- that are temporarily working overseas with the following caveats;
- a. The policy covers the University's employer liability under UK law. It does not provide any form of automatic compensation to staff;
 - b. The cover for temporary overseas work only applies to staff travelling from the UK and who are normally resident in the UK.
- 9.4. Travel insurance is available via the University but only for those travelling from the UK and returning within two years, although cover is restricted for those not

returning to the UK within one year. For more information visit the [University's Insurance webpage](#).

- 9.5. Staff planning to work outside of the EU may require additional local insurance in the country of placement. The cost of this additional insurance will need to be met by the employing School or Division and should be arranged through the University's Insurance Manager.
- 9.6. Motor and household insurance cover must be arranged for and paid by the member of staff. If staff are working from home overseas they should check to see whether their household insurance needs to be extended for business purposes.
- 9.7. The University recognises the level of free healthcare provision in some countries is not comparable to the NHS. Arrangements should be assessed on a case by case basis. If the country requires social security contributions to be made, this in turn could provide the staff member with (basic / subsidised / enhanced) healthcare entitlement. Otherwise, additional private healthcare cover may be required to meet the minimum NHS standard. Schools should seek to engage with their faculty HR Business Partnering Team at the earliest opportunity to discuss arrangements for this. The school will cover the cost of any additional healthcare provision required and therefore this should be built into the financial planning process.

10. Travel

- 10.1. All University-funded travel and accommodation should be approved by the staff member's budget manager in advance of travelling.

Booking

- 10.2. Rail and air travel should normally be booked by staff through the University's [appointed travel management company](#). Additional guidance on what expenses can be claimed is available from the [finance website](#).
- 10.3. Staff who choose to fund their own travel and accommodation do not need to use the University's travel management company. When a third party is funding or arranging the travel and accommodation (and claiming back the expenses), the third party is not required to use the University's travel management company. In advance of travel, staff should ensure that they understand what a third party is

paying for, and how and when payments will be made, to avoid any unexpected expense.

Airport transfer

- 10.4. Transfer between the overseas arrival airport and accommodation should be arranged by the member of staff prior to departure where possible. For safety and security reasons, hotel or agent organised transfers are preferred.
- 10.5. Care should be taken when being 'met' at the airport. Some deregulated taxi drivers will copy the name of a passenger from a hotel greetings board and pose as the official transfer car. Where no uniform/badge/identifier is visible, additional information should be sought to verify the driver's authenticity.

Accommodation

- 10.6. Hotels should be booked by staff through the University's appointed travel management company. Additional guidance on what can be claimed as expenses is available from the [finance website](#).
- 10.7. When checking in it is normal for a hotel to require a passport to verify identity. These are often photocopied, which is quite a normal procedure. The passport should always be returned at the time of checking in.
- 10.8. When checking into a hotel, staff should always include the University name on the checking in form. This will help the University to make contact without having to specify a room number.

Driving overseas

- 10.9. If you are planning to drive overseas, either in your own vehicle or a rental vehicle, you should familiarise yourself with the local requirements. Staff driving overseas should check whether they need to purchase an [international driving permit](#). If transiting through several countries, you may need more than one permit.
- 10.10. Driving your own vehicle abroad will also require a UK sticker on your vehicle and you will need to take your [vehicle registration document \(V5C\) or rental alternative \(VE103\)](#) with you.

- 10.11. You may need to apply for a green card from your car insurance company to continue personal vehicle insurance overseas. If you are renting a vehicle, check with the hire company what level of cover they have and the extent to which the insurance will cover you.

11. Income tax & social security

- 11.1. Staff working in the UK usually have Pay As You Earn (PAYE) Income Tax and National Insurance Contributions (also called Social Security) deducted from their pay by their employer. When staff are sent to work overseas this may affect their tax and social security obligations. The area around tax liability and social security is complex and country and person specific so specialist advice will need to be obtained from Staff Global Mobility.
- 11.2. Some foreign governments, such as China and Russia have linked immigration and taxation systems which can detect when migrant workers are not paying tax. This could result in the University and/or the staff member receiving a letter, fine, or in some circumstances, a criminal conviction and jail sentence.

University obligations – UK

- 11.3. When working overseas the University will continue to deduct PAYE/NIC. Staff who believe that this is incorrect should contact HM Revenue & Customs (HMRC) to discuss their circumstances. If HMRC believe that PAYE/NIC deductions should stop, they will automatically issue the University with a tax code which stops the deduction of PAYE.

University obligations – Overseas

- 11.4. The University can stop making UK national insurance deductions if the overseas social security department issue the appropriate certificate of coverage. The University will then need to establish regular payments to the overseas authorities. This process can take considerable time and in practice may be applied retrospectively. For this reason, staff will be advised to withhold earnings in line with the social security percentage of the host country to avoid unexpected backdated costs.

- 11.5. If the work is taking place in a country with high employer social security contributions, this will result in a higher cost base for the school. It is therefore important that these costs are factored in grants and business cases up front. This information will be provided as part of the staff global mobility advice service.
- 11.6. Under the [Criminal Finances Act \(2017\)](#), the University is duty bound to seek assurances that staff are paying tax in the correct jurisdiction. If the University suspects that this is not the case, the staff member may be required to provide evidence of their tax returns and could be subject to disciplinary proceedings.

Staff obligations – UK

- 11.7. Whether or not the University has deducted PAYE and NIC, staff remain responsible for ensuring that they have paid the correct amount of Income Tax for each tax year. If there is any uncertainty around this, the staff member should contact HMRC.
- 11.8. Where social security and income tax needs to be paid is determined by legislation. Staff are not allowed to choose where income tax and social security contributions are made. Apart from opting to continue paying voluntary national insurance contributions at the lower rate. Staff Global Mobility will assist staff with the rules around where income tax and social security needs to be paid and make applications for certificates of continuing liability on behalf of staff.

Staff obligations – Overseas

- 11.9. As a general rule, the longer a member of staff works in a country, the more likely it is that they should pay tax in that country. Most arrangements in countries that have an agreement on the prevention of double taxation generally allow UK income tax to be deducted for the first 182 days in a 365-day period and then the host countries income tax from day 183 onwards. Teaching activities might be taxable from day one and may also create equivalent corporation tax and VAT for the University if income is received for the teaching activity. Staff should familiarise themselves with information which can be found on the [gov.uk website](#).
- 11.10. It is important to note that the University has an obligation in the UK to operate PAYE and deduct National Insurance. This is separate from a member of staff's

obligation to pay UK Income Tax (via a tax return if appropriate) which may arise whether or not the University has operated PAYE/NIC. A tax liability overseas may arise whether or not the University is deducting money from your pay. Outside of the UK most countries require by law that residents and non-residents file an annual income tax return. Some countries have a requirement to do so, even if no tax is due, sometimes called a nil return.

- 11.11. Failing to correctly pay taxes in some countries may affect an individual's ability to enter and leave that jurisdiction. It is the member of staff's responsibility to ensure that they investigate and ensure they meet any tax obligations in the country they are in, as well as checking whether they will be liable for taxation in the UK and the foreign nation/state. Information on UK tax treaties can be found on the UK Government's [Tax Treaties info pages](#). International Mobility will carry out a triage on behalf of staff to identify staff obligations.
- 11.12. Some countries have partially devolved tax systems, which require staff to make income tax payments to the Federal tax authority, state/province/canton authority and municipal authority. Church tax is also commonplace across European countries. Tax treaties cover federal taxation but doesn't always cover state or municipal taxation. Each arrangement will require an assessment by Staff Global Mobility to identify statutory obligations.
- 11.13. Staff may be required to make social security contributions in the host nation, either instead of national insurance or as well as national insurance contributions in the UK. The UK has several social security [reciprocal agreements](#) to avoid a member of staff and the University having to both pay social security in the UK and abroad. The coverage of social security agreements with other countries in the World is c. 23%.
- 11.14. Protection from social security deductions in the UK and the host nation of the same earnings can be obtained by applying for an A1 certificate or a certificate of coverage (country listed in the [reciprocal agreements](#)). Staff Global Mobility can advise which authority you should use to apply for certification.
- 11.15. Staff are advised to keep a diary of days spent in each country for the time spent overseas. The more accurate time spent in each location is recorded, the easier it is

to get concessions from tax for time spent outside of a jurisdiction. Weekends should also be included, as many tax authorities count weekends in their calculations.

12. International payroll

- 12.1. In some circumstances the university may be legally obliged to run an international payroll to satisfy tax withholding obligations. This will be organised centrally through payroll with our International Payroll Provider.
- 12.2. Where staff are setup on an international payroll, tax and social security withholdings will largely be automatic. In most circumstances staff will still need to file an annual tax return. Our international payroll provider can help advise on the tax return process.

13. Pensions

- 13.1. Staff sent to work abroad will continue to have Universities Superannuation Scheme (USS) or University of Bristol Group Pension Plan (UBGPP) pension contributions taken from their pay unless they take action to leave the pension scheme or they become ineligible for the pension scheme.
- 13.2. Where staff become ineligible to make cross border contributions towards their USS pension due to EU residency and they had previously been a member of USS, they have the option to maintain life & critical illness cover contributions. In addition, the University will establish a payment in lieu of pension (PILOP) allowance which represents the benefit element of the USS employer contribution, minus any extra employer contributions towards statutory social security provision in the host country.
- 13.3. PILOP allowances for EU resident staff are temporary and circumstantial and could be withdrawn at a later date. For example, if staff become eligible for USS again, the University will auto-enrol them back into USS and cease the PILOP allowance.
- 13.4. In some countries, you will be required by law to pay into a work based or state pension scheme and not be able to opt out of pension arrangements. e.g. Australia or Norway. Depending on the length of arrangement, you may be able to claim back contributions when you leave the host country.

- 13.5. In the event that a member of staff stops having national insurance deducted, because social security is due overseas, their qualifying years towards a UK basic state pension might be affected. The member of staff is responsible for deciding whether to pay voluntary national insurance or not. More information on this can be found on the [UK Government Website](#). Staff should contact payroll at their earliest convenience to continue contributions whilst overseas.

14. Expenses

- 14.1. Information relating to the claiming of personal expenses incurred while on University business can be found in the University's [Travel and Expenses Policy](#).
- 14.2. Staff who are unsure as to whether a particular expense is claimable should contact their Head of School or Division in the first instance and their Finance Business Partnering Team.

15. Health, safety & security

- 15.1. The University has a responsibility to make sure a suitable and sufficient risk assessment of the risks to the health, safety and security of our staff. Appropriate managers have a duty of care for their staff when working abroad. Whilst UK health and safety law does not generally apply to overseas accidents there may still be responsibilities under local criminal and civil law. The Health and Safety Executive in the UK retains the right to prosecute if they feel that management failings in the UK have contributed to an overseas accident.

Risk assessment

- 15.2. Before a member of staff works overseas it is important that a [risk assessment](#) is carried out to ensure that any risks are identified and that steps are taken to mitigate these. It may not be appropriate for the immediate line manager to carry out the risk assessment, however they should ensure one takes place considering the work environment the member of staff will be working in, along with regional security, safety and health considerations.
- 15.3. A more detailed risk assessment must be undertaken for working abroad that will involve greater risks, including postings to destinations/areas where the Foreign &

Commonwealth Office (FCO) advises against travel (or 'all but essential' travel), or where the planned activities are deemed to be potentially hazardous.

- 15.4. Where the FCO advises against all but essential travel to the region of work or temporary/permanent residency, the risk assessment along with a School business case and overseas working advice from Safety & Health and Staff Global Mobility should be reviewed and approved by the Dean. Where the FCO advises against all travel to the region of work or temporary/permanent residency, the risk assessment along with a School business case and overseas working advice should be referred to the PVC Research for approval.
- 15.5. Overseas travel may involve working in fluid environments, where staff need to make quick mental assessments and manage risks 'on the hoof'. The University's Safety and Health Services Office have issued [detailed guidance around working offsite](#) and a Managing Fieldwork Safely course.
- 15.6. From time to time, the University may need to ensure it fulfils its duty of care by purchasing specialist security, safety and health advice and/or training. This additional cost will need to be met by the School or Division.
- 15.7. The University mandates that staff download the [SafeZone app](#), which provides guidance and contact information in the event of a medical or security situation while travelling abroad.
- 15.8. Staff should declare any pre-existing medical conditions to their appropriate manager which could be worsened as a result of travel. Where staff do not wish to share personal health information, they should seek an assessment from their GP or the university occupational health service to ensure they are fit to travel and work abroad.

Vaccination and medication

- 15.9. Where preventative medication is required for a country. It is the member of staff's personal decision as to whether they wish to take any medication and to arrange this prior to travel. The NHS provide up-to-date information and guidance around what vaccinations are required, when these are appropriate and whether or not they are available via the NHS on their [Travel Vaccinations web-pages](#). The

University will reimburse any work-related vaccines or medications recommended by the [NHS Fit for Travel website](#).

16. Communication

Itineraries

- 16.1. A full itinerary, including flight numbers, passport copy, hotel contact details, other travel arrangements and appointments should be lodged with the appropriate manager.
- 16.2. Itineraries should include a personal contact who can be contacted by the University in case of an emergency. The personal contact should also receive a copy of the itinerary and the contact details of the appropriate manager.
- 16.3. Short notice changes to itineraries should be reported to the appropriate manager as soon as practically possible.

Maintaining contact

- 16.4. The appropriate manager should be contacted by staff on arrival and act as primary contact in case of problems. The staff member and the appropriate manager should agree a communications plan prior to the work commencing.
- 16.5. It is strongly recommended that wherever possible staff carry a mobile phone with call capability in the destination country.
- 16.6. Online voice-over IP (VOIP) and video telephony services are highly recommended and rapidly becoming the norm for communication from overseas.

17. Intellectual property

- 17.1. Academic members of staff who work overseas and are based with a host institution are often asked to sign an Honorary/Visitors contract stating that any intellectual property created belongs to the host institution. If you are expecting the outcomes of your collaboration to have commercial applicability please speak to the [Research Contract Team](#) in the Division of Research, Enterprise and Innovation (DREI) who will offer advice on how you can ensure that you do not lose any commercial rights you may have through the University.

18. Data protection

- 18.1. It should be noted that under the [Data Protection Act 2018](#), where personal data is transferred out of the European Economic Area (EEA), the University must ensure that the recipient country provide adequate level of protection for the data and that the data subject is aware that their personal information will be sent outside the EEA. If a member of staff will be working in a country outside of the EEA, they should contact the Information Security Manager and the Information Governance Manager to discuss how these risks may be mitigated.
- 18.2. Further guidance on data protection can be found on the [University Secretary's Office website](#) or by contacting the University Secretary's Office by email data-protection@bristol.ac.uk.
- 18.3. All data relating to staff working overseas is collated centrally to ensure the University and staff are compliant with the overseas legislative requirements. The data held is a combination of an Overseas Working Questionnaire that the member of staff completes at the outset, existing data held within the core HR system and derived data relating to the specific assignment. For example, a date in which we need to transfer someone from a UK payroll to an overseas payroll or a record of activities undertaken related to the overseas workers case. This information is provided to third party organisations for the purposes of identifying compliance actions that need to take place and for processing by third party processes; such as international payroll, international insurance providers and tax authorities etc. This information is processed in accordance with the [staff fair processing notice](#) on grounds of either legislative requirement or contractual obligation.

19. Bribery Act 20210 & Modern Slavery Act 2015

- 19.1. As the University operates internationally, staff are reminded to be extra vigilant when conducting business overseas as there may be a greater risk of exposure to unethical activity.
- 19.2. For more information, please visit the University's [anti-corruption and bribery webpages](#) and the University's [modern slavery statement](#).

- 19.3. If hiring locally employed civilians to assist with research, Staff Global Mobility can review the proposed arrangement to ensure pay is of a reasonable standard for the country, that the national minimum wage in that country is not breached, and that the justification for employing locals is not justified because labour is cheap. Local staff are likely to have a tax and social security liability from day 1, which may require an International Payroll to facilitate. This may build in additional costs which make directly employing local staff financially unviable. Staff should familiarise themselves with the [Research Governance & Integrity Policy](#).

20. Roles & Responsibilities

Staff working overseas:

- 20.1. Are required to plan overseas working several months in advance to meet lengthy statutory lead times.
- 20.2. Are required to complete an overseas working questionnaire.
- 20.3. Are responsible for making sure they are paying the income tax and social security in the correct places.
- 20.4. Are responsible for filing a tax return in the host country.
- 20.5. Are responsible for paying fines in the event that they do not file an individual tax return on time.
- 20.6. Are responsible for ensuring adequate travel insurance and health insurance covers the arrangement in line with advice provided.
- 20.7. Will liaise with IT security regarding the access, storage, processing and transferring of research/teaching/admin data in-country and between countries.
- 20.8. Will liaise with occupational health to ensure they are fit to fly and fit to work overseas from both a physical and mental health perspective.
- 20.9. Will work through risk assessment with appropriate manager/PI/supervisor to mitigate risks and develops a clear plan, where necessary, for evacuation in the event of civil unrest, natural disasters, health emergency or a terrorist attack.
- 20.10. Will keep all necessary parties up to date with changes in circumstances.

- 20.11. Will liaise with host to ensure suitable arrangements are in place to reduce/prevent injury or harm.
- 20.12. Will keep up to date with FCO guidance on travelling to and working in the host country.

Head of School / School Manager

- 20.13. Will review the costs in conjunction with:
- a. local Faculty Finance & HR Teams
 - b. advice and support from the Staff Global Mobility Group.
- 20.14. Will carry out a brief cost benefit analysis by reviewing the costs and risks provided by Staff Global Mobility against the perceived benefits of an arrangement (e.g. Research Excellence Framework (REF) inclusion, current and future grant income, elevated reputation of the School or University, development of future opportunities, retaining leading academics in their discipline etc.)
- 20.15. Will either:
- a. approve the arrangement
 - b. explore alternative arrangements with HR, Finance & Staff Global Mobility or
 - c. decide the arrangement should no longer take place.
- 20.16. Will exercise duty of care by establishing ongoing communication channels with the member of staff.
- 20.17. Will carry out risk assessments with the staff member overseas or delegates to the appropriate manager/PI/supervisor.

Deans / Pro Vice Chancellor Research / University Executive Board (UEB)

- 20.18. In most cases, the decision whether or not to support an application for overseas working will be made at School level. However, where a case has one or more high risk aspects that could impact on the University reputation or liability for costs, the case should be escalated to the Dean for a decision. Where the arrangement goes against [Foreign Commonwealth Office advice](#) (e.g. working in a war zone or political/societal unrest), the Dean should escalate the advice to the PVC

(Research) to decide on behalf of the University. The Dean and PVC (Research) should consult with internal expertise before approving a case.

- 20.19. If a case involves an overseas teaching aspect, either remotely or in person, the Head of Tax will be asked to contribute to the business case, with specific consideration to the risks of creating a permanent establishment, corporation tax, VAT liabilities overseas and whether there is a statutory requirement to incorporate the University as a legal entity in an overseas territory. Where one of these risks is likely, the case should be escalated to UEB for approval.

Staff Global Mobility Support Group (HR, Finance, Safety & Health, Insurance, Payroll & Tax):

- 20.20. Issues high level overseas working questionnaire for potential exploratory cases and new cases.
- 20.21. Provides tailored advice for each case, identifying the costs associated with tax, social security, business registrations, international payroll, and risks associated with employment, insurance coverage, safety, security, health and pension eligibility.
- 20.22. Supports and implements actions identified in the overseas advice document once approval has been received.
- 20.23. Liaises with external third parties when required to arrange international payroll, specialist third party mobility support and specialist legal advice.
- 20.24. Applies for social security certificates, tax reductions, exemptions and rebates.
- 20.25. Liaises with employee and provides support and advice.

Third party specialists (various suppliers)

- 20.26. The requirement to involve third party service is largely dependent on the risks, costs and laws associate with the arrangement. These services will be commissioned on an ad hoc basis depending on the circumstances of the arrangement.
- 20.27. Third Parties can:

- a. provide advice on staff global mobility, employment law, business registration & licencing, pension rules and taxation
- b. run International Payrolls on behalf of the University
- c. procure additional services such as workers' compensation insurance
- d. arrange safety & security training
- e. assist with creating legal employer status overseas.

21. Funding

Research funding

- 21.1. The way overseas working arrangements are funded can vary depending on the sources of funding. For example, a standard Marie Curie Fellowship contract provides allowances to cover additional social security and tax, so may cover the whole arrangement. Where an arrangement is part funded through grants/stipends and part funded by core funds it is important to know up front how additional statutory on-costs will be funded.
- 21.2. Where external research funding is paying for part or all of the arrangement, the school should check that the funding terms allow for work to be undertaken overseas with Finance Business Partnering Team & DREI, and seek approval from the funder when it is not explicitly clear. Where not supported, the arrangement cannot take place because the grant may be invalidated and withdrawn.

School funding

- 21.3. Where research grants and stipends do not meet the full cost and/or cover any on-costs, these costs will need to be met by the school. It is important to note that the full economic costing software does not include overseas costs, because in relative terms overseas workers are a very small population of the workforce. This is why it is important that Staff Global Mobility is engaged early on in the planning process, so costs can be surfaced in addition to standard costings.
- 21.4. Typically, the school will need to pay for any additional employer social security, expenses, insurance, healthcare insurance, payroll running costs for each member

of staff and where necessary, the cost of legal and translator services for compliant employment contracts in the host state and specialist third party tailored advice.

Professional services support

- 21.5. Professional Services will fund support in the form of the Staff Global Mobility Team. Existing capacity will be utilised within key stakeholder groups: the tax team, payroll & pensions team, insurance, and safety & health.
- 21.6. In addition, Professional Services will manage contracts with specialist advisors. The cost and organisation of International Payroll will be managed by the University Payroll & Pensions Team. Costs of new country payrolls will be paid for centrally. The running costs will be met by the school.

Overseas worker

- 21.7. Is responsible for paying and filing income tax and social security, where required by law.
- 21.8. Can claim expenses in line with the travel & expenses policy.

22. Further advice

- 22.1. For further advice, please contact your Faculty HR team.
- 22.2. Email Staff Global Mobility at staff-globalmobility@bristol.ac.uk.
- 22.3. From time to time, it might be appropriate for central professional services to engage with third party organisations specialising in staff global mobility, taxation, employment law, insurance and health & safety due to the complex nature of access and working in some countries. As engagement with these third parties can be quite a lengthy process, extra time should be factored in at the planning stage.