



The Brexit effect on EU nationals

**A survey on what European workers
will do now**



Contents

Our report	1
Executive summary	2
Outflows: In danger of a brain drain?	4
Inflows: Do EU nationals still want come?	8
Reaction to UK policy: What effect has government action had?	10
Motivations: What is driving Europeans to rethink life in the UK?	12
How can employers respond?	14
Planning your post-Brexit workforce	16
Our services	18
Our people	20

Methodology

This report is based on two opinion polls commissioned by KPMG in the UK. The first was a study of EU citizens in the UK, conducted by OnePoll between 14 and 31 July 2017. We polled 2,000 employed EU citizens that currently live and work in the UK. Participants were recruited online and were paid to participate.

The second was a study conducted by OnePoll between 14 and 25 July 2017, polling 1,000 EU citizens living in, and citizens of, the 10 largest EU net contributors to UK migration: Poland, Republic of Ireland, Romania, Portugal, Italy, Lithuania, France, Germany, Spain and Latvia. One hundred people were polled in each country. Ten percent were students and 90% were employed. Participants were recruited online and were paid to participate.

Our report ...

“People” is often the first word clients reach for when talking about their big Brexit issues.

Regulation, tariffs or market access are just as complex and multi-faceted. But few questions are as emotive as “what happens to us?”. And few issues are as unpredictable as one which rests on the private thoughts and feelings of the **2.4 million people** born in the EU and working here in the UK.¹ Each one of them will have their own personal take on Brexit: what it means for them and what they will do as a result.

This report is an attempt to gauge those views and assess what that means for the nation’s employers.

When the UK voted to leave the EU back in June 2016, the ‘people debate’ focused mostly on who would be allowed to stay. Fourteen months on, an equally pressing question is whether EU citizens will actually want to stay – and if those in the EU will want to come here.

Last year’s referendum represented a sea change for many EU nationals living and working in the UK. All of a sudden, questions that had possibly never crossed their minds became – for many people – priority issues. Will I be able to carry on working here? What new status might my family and I need to acquire? And how long might I be able to stay?

Although figures released by the ONS in mid-August showed the number of EU nationals working in the UK¹ has hit a record high, this was mostly the result of a specific spike in the number of Bulgarian and Romanian citizens finding employment here. Numbers from eight other eastern European countries were down and the overall rate of growth in EU workers has tailed off significantly. Anecdotal evidence and specific industry data suggests Brexit has encouraged at least some to leave already and others to abandon thoughts of moving here.

The fact that we have not yet seen a fall in the UK’s EU workforce, doesn’t mean we won’t. To test that proposition, last month **we surveyed 2,000 EU citizens working in the UK**. The purpose was to understand what those affected intended to do, why and also to test what impact the UK Government’s offer on citizens’ rights was having. In addition, we **surveyed 1,000 EU citizens in the 10 EU countries** which contributed most to UK net migration last year. This second survey sought to establish the likelihood of future arrivals and therefore of potential shortages of EU labour.

What the two surveys reveal together is the more nuanced picture than the idea of a ‘Brexodus’ sometimes portrayed in the media. Yes, EU citizens working in the UK are undoubtedly feeling confused, and some upset, by the vote and are questioning whether they will still call the UK home. And in the rest of the EU, people’s view of the UK as a place to live and work are now less favourable than before the referendum.

And yet, the survey also shows Britain remains an attractive destination, both in the eyes of people here and those still based overseas. **Of those we surveyed in the UK, 45% said they wanted to stay** – most strongly attracted by better work opportunities, a diverse culture and an open society, the report shows.

Tellingly, it also indicates that a significant number of people have yet to decide their future direction: less because they can’t make up their minds and more because they are waiting to see how things go politically, socially and at their places of work.

In other words, **the eventual inflows and outflows of EU citizens hangs in the balance** – and that means, for employers, it’s all to play for. Now is the time for organisations to take a more active position and to respond to the needs of their EU-born staff.

Employers have an important year of workforce planning ahead. As well as securing labour in the immediate term, the upheaval created by Brexit raises longer-term, equally vital, strategic questions that must be addressed to build a workforce fit for the next decade.

I hope this survey and accompanying analysis helps answer some of those questions.



Karen Briggs

Head of Brexit and Member of the Executive Committee of the Board, KPMG in the UK

Executive summary

- **Almost half of EU nationals in the UK are planning to stay. Whether significant numbers leave, remains in the balance**

Of the 2,000 EU citizens surveyed, 45% said they planned to stay and only 8% are currently planning to leave. However, a large number (35%) are considering leaving. That group, together with those planning to leave, equates to some 1 million EU citizens in the UK.¹

- **The UK may be seen as a less attractive place to live, but it remains desirable**

Two thirds of EU citizens in their home countries still view the UK as an attractive place to work and well over half said they would move to Britain if the right opportunity arose. Better work opportunities, diverse culture and an open society were cited as the big draws.

- **Younger, better qualified and higher-paid people are more likely to be mulling an exit, raising the risk of a brain drain**

Half of respondents with PhDs and 39% with postgraduate degrees are thinking about leaving. Equally, the likelihood of leaving rose the higher people's income. Over half (52%) of those earning £50,000-£100,000 said they would leave or were thinking about it. Eleven percent of 18-24 year olds said they had already decided to leave.

- **Britain's offer on citizens' rights has failed to shift perceptions but the ECJ is an issue**

Over half said the UK Government's proposal on their rights in the UK had made no difference to their thinking, while the remainder were split for and against. Yet on the issue of the European Court of Justice (ECJ) still protecting their rights post-Brexit, there was strong support. Europeans here want more reassurance from the government.

- **A perception that British society has changed is the main reason people are thinking about leaving, or not coming in the first place**

Half of those surveyed in the UK said they felt less welcomed and valued here, followed by factors based on feelings or principle. Practical issues ranked down the list. In Europe, of those who said they wouldn't move to the UK, a fear that Britons weren't welcoming was uppermost in their minds.

- **EU citizens want employers to show more solidarity and offer more moral support**

Over half (51%) of EU nationals in the UK want to hear a clear commitment from their employers that they want them to stay. A further 39% want them to publicly assert the importance of EU staff.

- **Employers can't sit back and wait for a clearer picture to emerge from negotiations**

Understanding your exposure, reaching out to European employees and establishing policies in the event that EU nationals are classed differently after Brexit will cut attrition rates in the short term and prepare organisation in the long run.

- **Brexit can be the catalyst for a fresh look at workforce strategy**

Robotics, Artificial Intelligence (AI) and automation may play a significant role in mitigating a Brexit effect on the UK's skilled workforce. In the medium term, Brexit will require employers to be far more proactive and imaginative in the way they attract and compete for talent (here and overseas). It will also demand a fresh approach to the training and development of home-grown talent and their pay and reward.

¹ ONS: UK and non-UK people in the labour market: August 2017



Outflows:

In danger of a brain drain?

EU citizens are a vital cog in Britain's labour force, accounting for one in every 14 workers, and far more in many sectors, such as healthcare, manufacturing and food and hospitality (**figure 1**). We aren't speculating about the UK's eventual migration system, but for the purposes of this report we have assumed the UK will maintain a migration system that continues to allow a number of EU citizens to live and work here. The question is therefore whether Europeans in the UK will want to stay, or new arrivals will still come.

The survey shows that more economically desirable people are more likely to leave, a group we've called the INDEYS: independent, in demand, educated and young (**figures 3 to 5**). Competition in this group – IT designers, engineers and finance professionals to name a few – not only comes from Frankfurt and Paris, but global destinations, from Shanghai to New York.

From a regional perspective, London and Scotland could be the areas that experience the greatest outflows, with 46% of EU citizens surveyed in the two regions saying they were planning to leave or considering it. By contrast, just a third of EU nationals in the North East and the South West (32%) fell into that group.

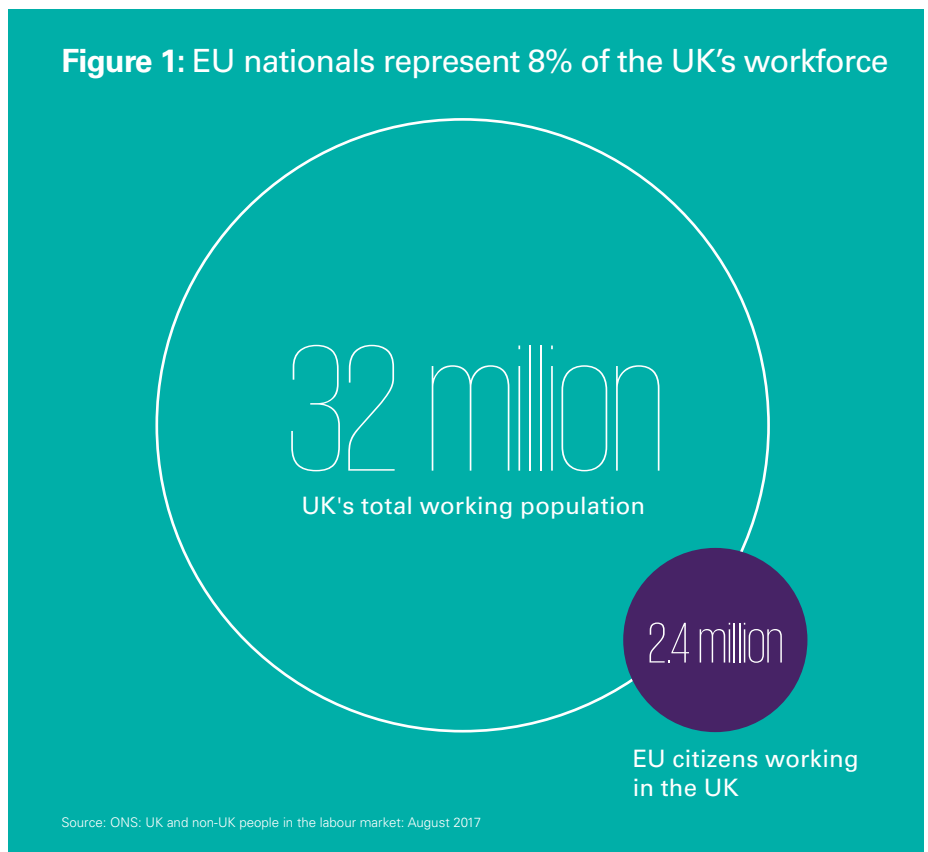
Figures from the Office for National Statistics show a sharp rise in EU citizens emigrating in the year to end-March: up 33,000 to 122,000². Over half the increase came from EU8 countries – Eastern European countries which joined in 2004.

For employers looking to retain INDEYS and EU staff more generally, there is no time to lose. Of those who say they are leaving, just over half (51%) plan to have left by the end of next year.

“Against the backdrop of the lowest jobless rate since 1975 and the different demands of millennials in the workplace, a significant proportion of those EU workers we spoke to said they were thinking about – or were already planning on – leaving the UK. Extrapolated across Britain's entire EU workforce, that is a group equivalent to almost 1 million people. This finding means employers in the most impacted sectors may need to do two things: first, take a hard look at their approach to recruitment, retention, motivation and work patterns in order to retain their best people. And second, examine how they can accelerate existing moves towards AI, robotics and automation”

Andrew Coles, Head of Pensions and People Consulting

Figure 1: EU nationals represent 8% of the UK's workforce



Source: ONS: UK and non-UK people in the labour market: August 2017

EU inflows reducing ...

In the year ending March 2017, net migration of EU citizens to the UK fell by

51,000
to
127,000
its lowest level since 2013²

Figure 2: Almost half those surveyed in the UK said they were planning to stay, but over two fifths say they will leave or are thinking about it

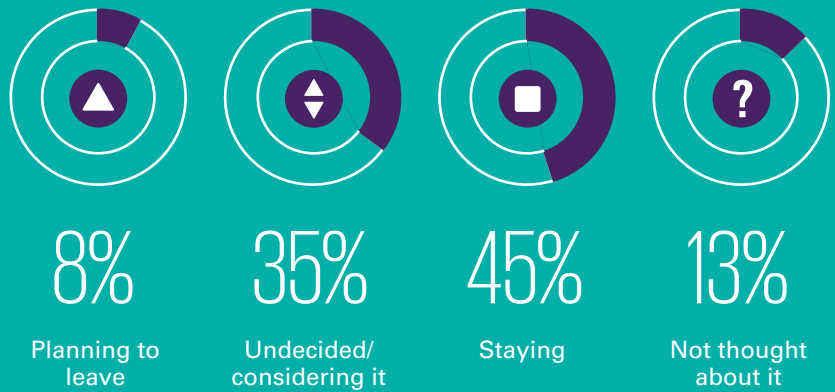
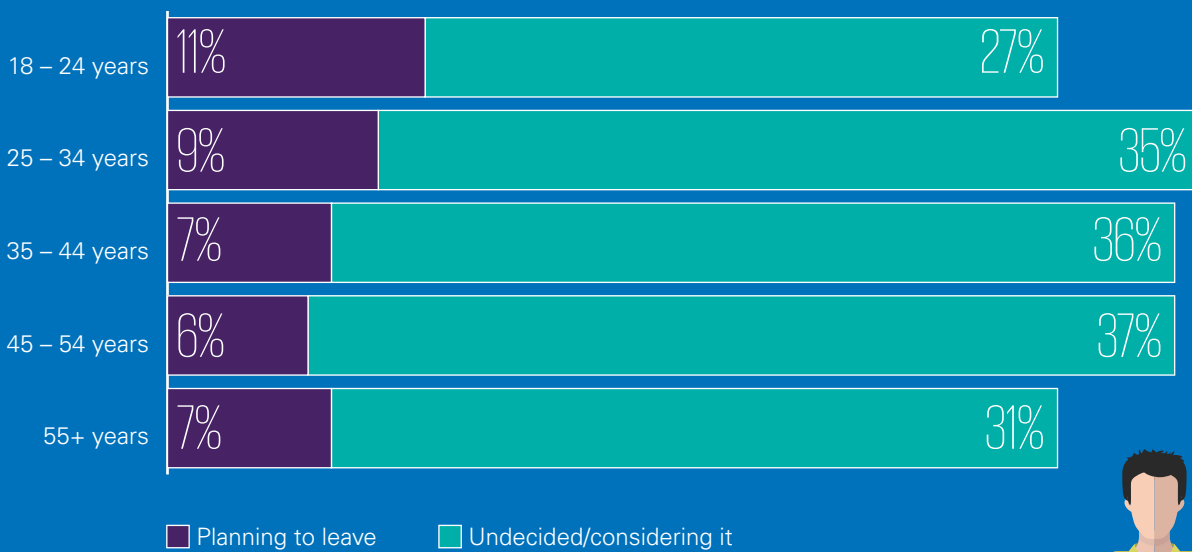


Figure 3: Young people are more likely to have plans to leave



Outflows:

In danger of a brain drain?

Figure 4: Higher income earners most at risk of leaving

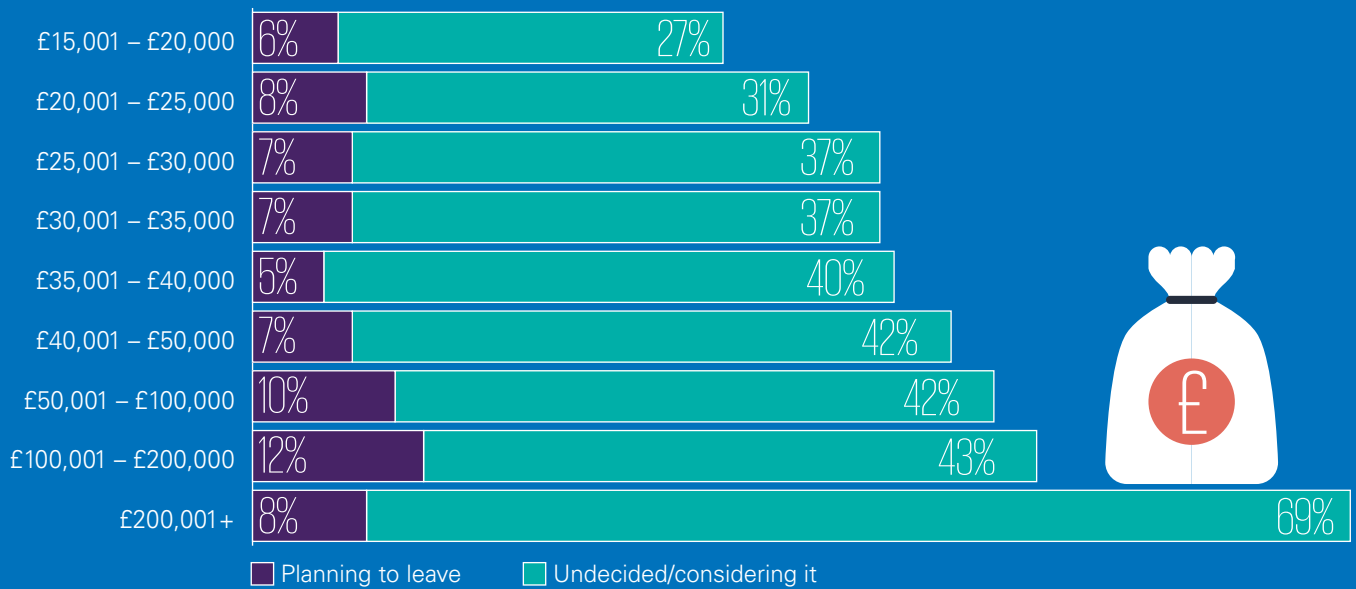


Figure 5: Those with higher qualifications are more likely to be thinking about leaving

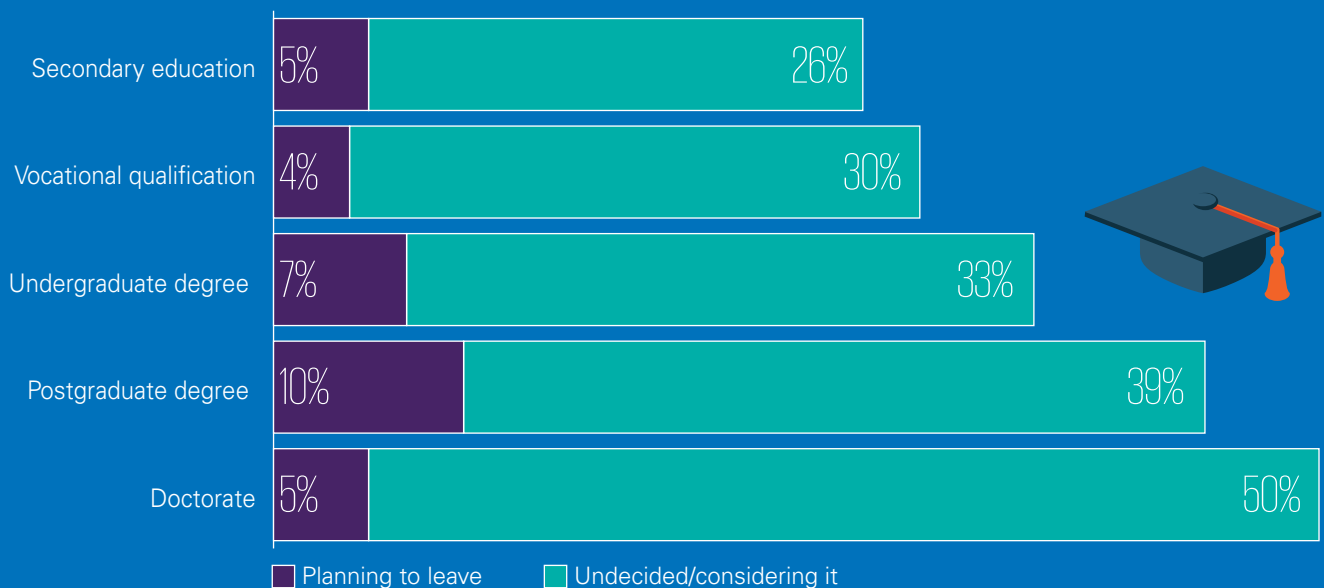
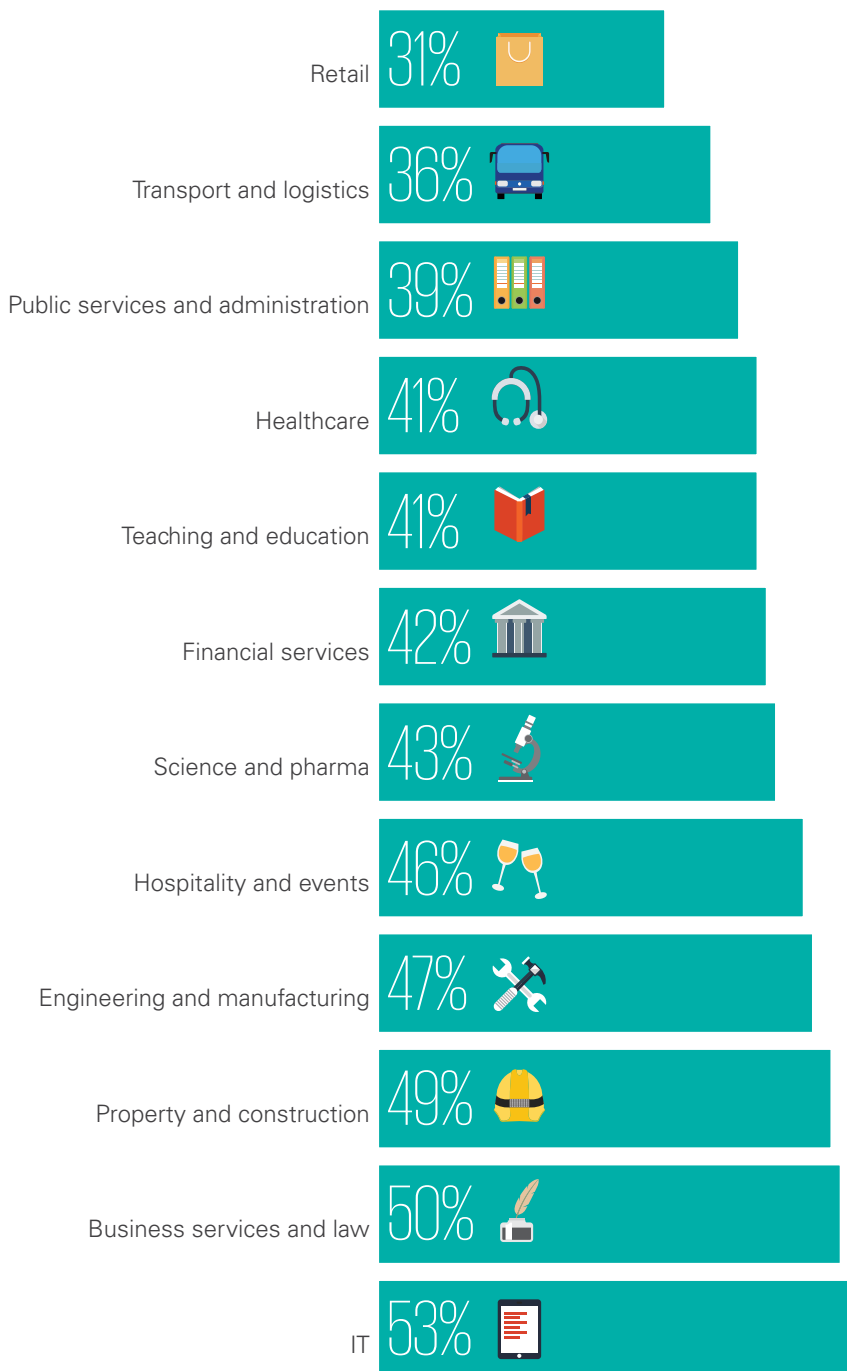


Figure 6: Sector breakdown by those leaving or considering leaving the UK



“Our survey reveals a potentially serious situation for employers who have relied on EU staff: if we focus in on the younger talent and the higher-income levels, that’s where the real concern is. We see that the young have far less that ties them here and that those with higher qualifications are also seriously thinking about developing their career elsewhere.”

Punam Birly, Head of Employment & Immigration Legal Services and Brexit People Lead

Inflows:

Do EU nationals still want come?

The encouraging news for UK plc is that the country remains attractive to EU nationals. A total of 71% of EU nationals in the UK considered it either very or quite attractive as a place to work and 45% said they were planning to stay. Some 67% in their home countries also answered positively (**figure 8**). And 56% of EU citizens outside the UK said they would move to Britain if the right opportunity arose.

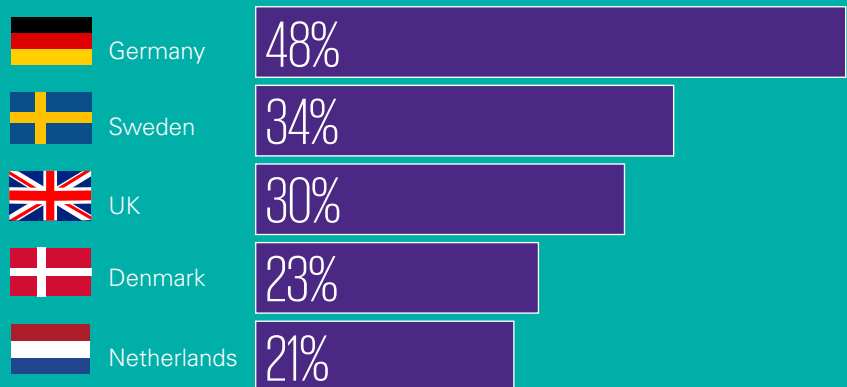
The country is still ranked in the top five most desirable places to live in Europe (**figure 7**). Of those EU nationals living in the UK, 43% said they were most attracted by the diverse culture and interesting lifestyle, while 39% named the welcoming and open society – far more than the 26% who said they came for higher pay.

That said, almost half of European citizens across the Channel and Irish Sea perceive the UK more negatively as a place to live and work than they used to (49%), while only 16% have a more positive view.

Recent data from the ONS actually shows that the number of EU nationals has hit a record high in recent months, with an estimated 2.37 million workers from the EU in Britain between April and June this year, up by 126,000 on the same period a year ago.³

Yet dig below the surface and the story is a little more complex. Those figures are explained primarily by a steep rise in the number of Bulgarian and Romanian workers coming here – up by more than a quarter to 337,000 over the past 12 months. Those new arrivals may still be driven by the search for a better life or perhaps seizing their chance to find employment in the UK before the window closes.

Figure 7: Top five most desirable places to live in Europe



By contrast, the number of employees from eight other eastern European countries declined from just over one million in the second quarter of 2016 to 997,000 in the same period this year.

“After Brexit, UK plc will need to go on a charm offensive to keep attracting the brightest and best. Our survey shows that EU nationals in the UK place greater value on being part of a welcoming society than any financial advantage they may gain from working here. For employers, fostering an open and diverse culture is as important as their staff’s take-home pay.”

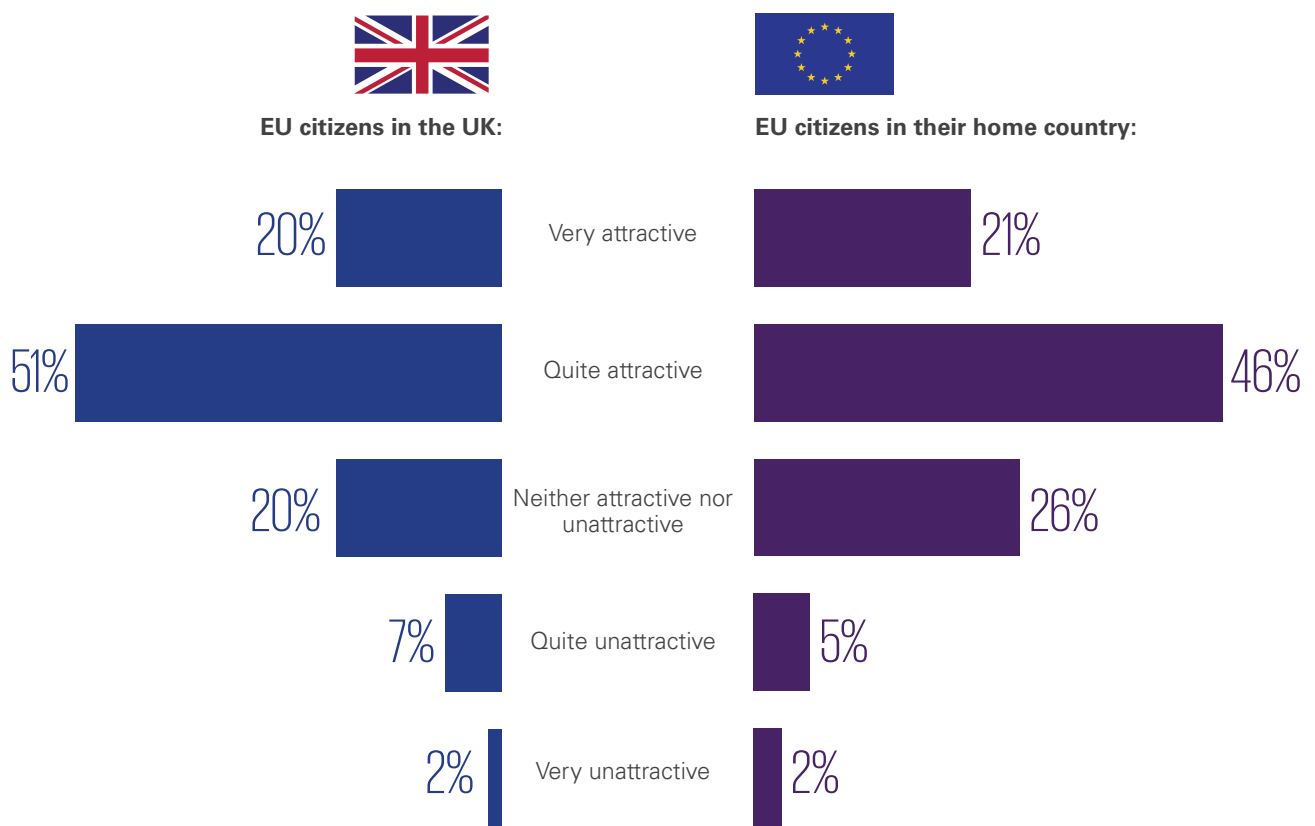
Mark Essex, Public Policy

49%

of EU citizens in their home countries feel the UK has fallen in desirability as a place to live and work

³ ONS: UK and non-UK people in the labour market: August 2017

Figure 8: The UK remains an attractive place to live and work



“Our survey shows it’s all to play for – and business has a real opportunity to influence the situation at an organisational level. It’s up to employers to ensure their organisations remain attractive propositions.”

Mike Falvey, People Consulting

Reaction to UK policy:

What effect has government action had?

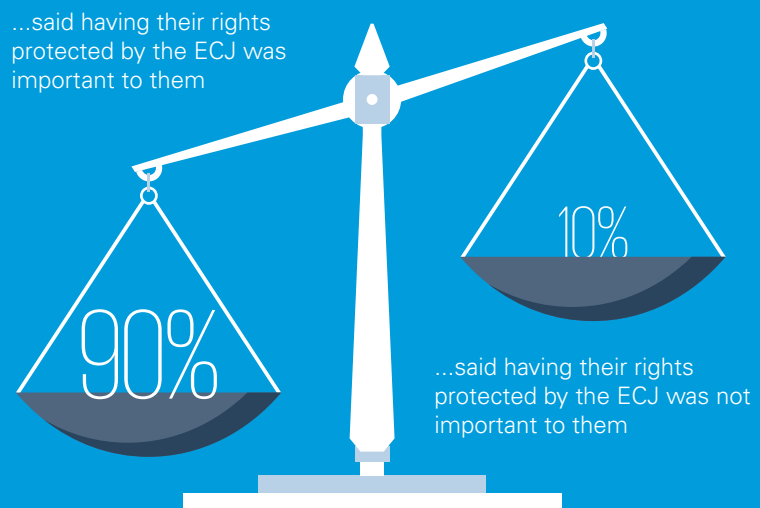
In June, the UK Government sought to settle EU citizens' nerves and remove a potential barrier in negotiations with what Prime Minister Theresa May described as a "fair and serious" offer on the rights of EU citizens in the UK.⁴

The paper sets out the rights of EU citizens before and after a cut-off date which would be no earlier than 29 March 2017. The Prime Minister was unambiguous in saying she wanted EU citizens to stay. Nevertheless the paper does not address more detailed questions such as what would happen to EU citizens who work week days in the UK and return to Europe at the weekend. Equally, would social security rules preventing multiple liabilities for those working across the EU remain in force? And what exactly is the cut-off date?

Respondents to our survey were divided on the offer. Forty one percent said it was sensible and largely met their needs, but 40% said it did not (a figure higher among INDEYs). Overall, our survey suggests the offer is unlikely to sway people either way: 53% said it made no difference to their decision, while the rest were split fairly evenly between those 'more likely' and 'less likely' to stay as a result.

The **UK's residency application process** (which in its new online format is now significantly simpler) ranked a relatively lowly sixth among motivations to leave the UK. However, respondents were far more emphatic about their desire to still have protection from European Court of Justice (ECJ), as **figure 9** shows. The UK Government has said it will end the jurisdiction of the ECJ in Britain.⁵

Figure 9: EU nationals say having their rights in the UK protected by the ECJ is important



60%

of EU citizens said strong UK government support would be a very important factor in encouraging them to stay

⁴ <https://www.bloomberg.com/news/articles/2017-06-26/u-k-s-may-promises-to-protect-eu-citizens-rights-after-brexit>

⁵ <http://www.telegraph.co.uk/news/2017/01/17/theresa-mays-brexit-speech-full/>

Figure 10: UK government proposals have not made much impact on attitudes towards wanting to stay or leave the UK



The UK's offer on EU citizens' rights

The UK paper suggests that after the withdrawal date, all EU migrants, even those with permanent residence, will need to make applications to evidence a new right of residence. There will be a new scheme to make these applications. Those who qualify for permanent residence (normally by having resided in the UK for five continuous years) will have to apply for "settled status". People who do not qualify for settled status by the end of a two year grace period after withdrawal will need to apply for temporary residence, under rules which are not yet set out.

"At this stage, EU citizens in the UK don't appear to be paying much attention to government proposals. They know it's an opening move and are waiting to see something more concrete. What they want to hear right now are warm words just as much as hear the government's practical proposals"

Punam Birly, Head of Employment & Immigration Legal Services and Brexit People Lead

Motivations:

What is driving Europeans to rethink life in the UK?

How people feel, rather than more practical issues such as the value of the pound or applying for residency, is the key dynamic driving EU nationals to reconsider life in the UK or not come in the first place.

Many simply don't feel as welcome as they used to or now question the country they call home, as **figure 11** shows. That was particularly the case for women (53% versus 46% of men).

That split between 'practical' and 'principled' objections to Brexit differed with age. For those aged 25-34 the fall in the value of the pound (and what that means for their buying power back home) was a far bigger issue (39% citing this reason). By contrast, those 35 and older were more concerned about how Brexit made them feel, and in turn, how they now felt about the UK. The strongest reaction of all came from over 55s, 63% of whom said they were pro-European and disagreed with Brexit in principle.

Unsurprisingly, when we explored what would be important in encouraging people to stay in the UK, 58% cited 'a greater feeling that I am valued and welcomed by British society'.

It's a similar story from mainland Europe. Almost a third of those EU nationals surveyed in their home countries said Brexit made them think Britain didn't welcome foreigners (**figure 12**). Over a quarter (26%) said they were unsure if they'd even be allowed to stay after Brexit.

Our findings were underscored by evidence gathered by the [Migration Rights Network's](#) Listening Campaign earlier this year, in which 66% of respondents felt people in their local area talked about migration negatively.⁶

"Many of the 3.1 million EU nationals currently living in the UK have spent the past 12 months fearful as to what the Leave vote means for them and their families. For all the talk of trade deals and the ECJ, this is, above all else, a human story."

Punam Birly, Head of
Employment & Immigration Legal
Services and Brexit People Lead

6. Migrants' Rights Network paper - Migrants' Perspectives on Brexit and UK Immigration Policies

Figure 11: Top five reasons why people might not stay



EU citizens surveyed in the UK:

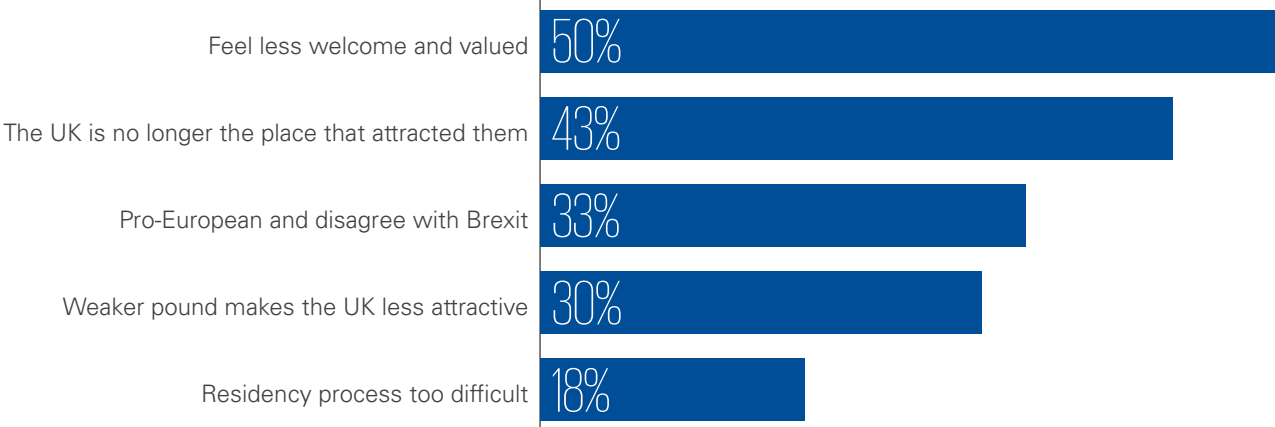
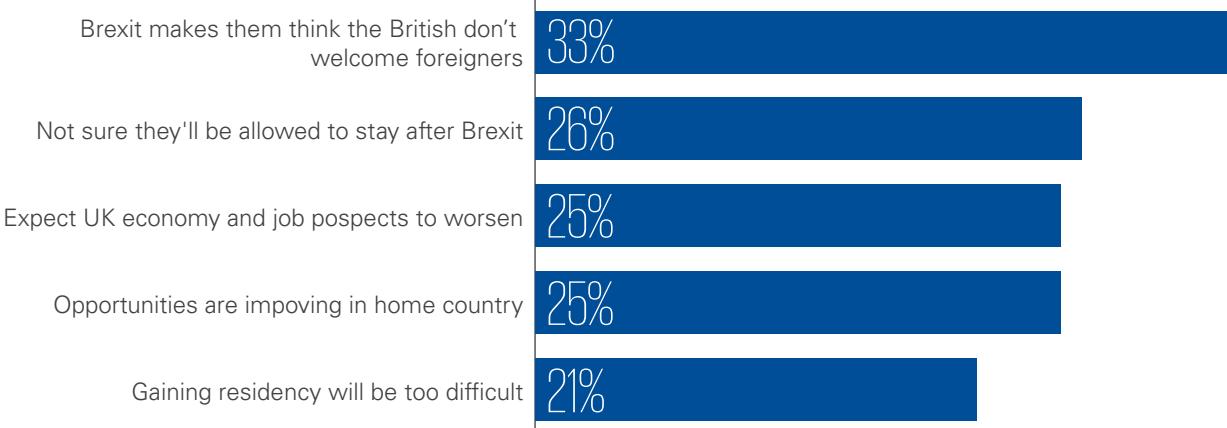


Figure 12: Top five reasons why people might not come at all to the UK



EU citizens surveyed in their home countries:



How can employers respond?

Our survey reveals a major potential flight risk for UK employers across all sectors, from farming to pharmaceuticals, banking to building. Though 45% said they will stay, more than two fifths – equivalent to nearly 1 million people – are considering, or have decided, to leave the UK.

There are a number of things organisations could and should be doing in the short term to protect their business from this potential exodus:

1. **Understand how exposed your business is**

Do you know how many EU nationals are working within your organisation, as well as those of your suppliers and clients?

An accurate assessment of how your workforce could be affected post-Brexit is an essential first step towards shaping an effective response to the challenges.

2. **Keep talking – and listening to – your EU nationals**

— As we approach Brexit, there are still many unknowns for businesses – and their employees. Far from adopting a wait and see approach, it is essential that employers communicate as widely and clearly as possible. EU nationals are also likely to be anxious about asking their employer questions about their tenure. Establishing a clear channel for listening to their concerns and providing as much information as you can will respond to exactly the kind of concerns we heard from our survey respondents.

3. **Decide your strategy to support staff with residency**

Organisations need to be assessing whether (or not) they should be supporting their staff and what they might need to do if they have to replace those who leave post-Brexit. In highly regulated industries, such as financial services, the relocation of staff (and offices) is already happening now. In others, some are considering automation as a viable alternative.

4. **Consider where existing employee policies now need an immigration element**

In the past, UK organisations will probably not have needed to have a separate 'EU nationals immigration support policy' in addition to one they might have that covered non-EU nationals. They may not have thought about including the risks around employing people with no right to work as part of their wider risk and compliance training. Immigration has increased in importance and best practice will soon consist of reviewing existing policies to incorporate changes as well as considering if new guidelines are needed in this post Brexit world.

Case Study: Russell Group University

With almost a fifth of their staff – some 900 people – coming from EU countries, one Russell Group University in the UK knew it was important to take a proactive approach to the people-related implications of Brexit. Many staff were feeling anxious and uncertain and struggling with the lack of information on their future status in the UK. The university quickly formed an EEA nationals network as a place to air issues and set up a dedicated intranet and mailbox. They held seminars for EU nationals, followed by dozens of one-to-one surgeries in conjunction with KPMG, to focus on the residency application process in particular and have since paid application fees for those who want to apply for residency.

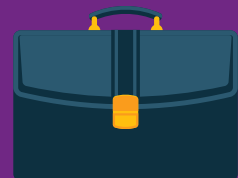
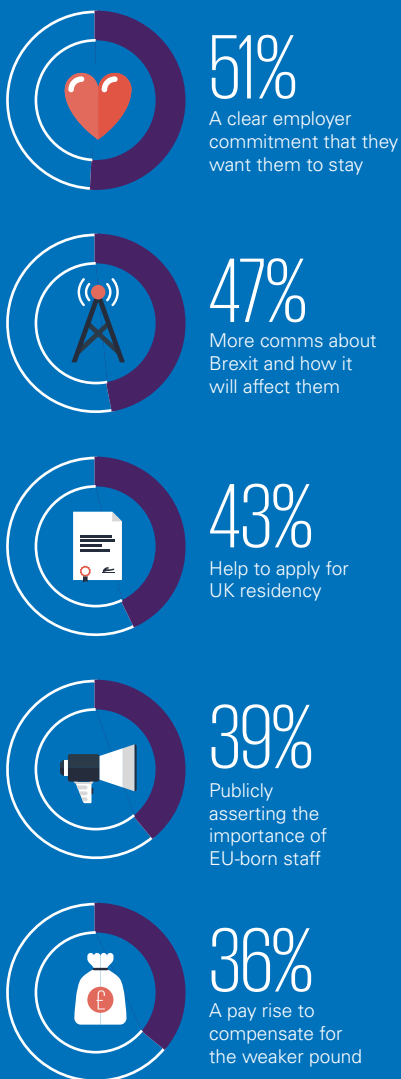


Figure 13: The top five things EU nationals want from their employers



“Many firms are not communicating with their EU nationals as effectively they should be. They are adopting an approach that is far too transactional and factual, whereas EU staff need to know that their employers want them to stay. There’s no silver bullet. It’s about reaching people with positive messaging and being comfortable enough to make them feel wanted. And the time to do that is right now: people are making decisions about their future as we speak.”

Tim Payne, Head of People & Change

“What should business do? The key is to understand your people’s motivations – and to offer meaningful advice about extremely practical concerns. Analyse which of your EU staff already have certainty and be ready to support those who don’t. Invest in paying bespoke personal attention to those staff’s needs. Provide comprehensive information about what needs to be done, when.”

Punam Birly, Head of Employment & Immigration Legal Services and Brexit People Lead

“It’s crucial to consider all this as far broader than your own workforce and understand the ecosystem in which you play, up and down the supply chain from farm to shelf, or factory to showroom. It’s not just about those areas about which you directly have control – that’s just a small part of it.”

Paul Martin, Head of Retail

Planning your post-Brexit workforce

One of the most striking findings of our survey is that it was the 'INDEYs' who expressed most ambivalence about staying in the UK, post-Brexit. UK employers looking to retain and hook in world-class talent, cannot ignore a threat to the future supply of young, qualified workers with highly-demanded skills such as IT and engineering.

Fortunately, there are a number of steps organisations can take to ensure they have the pipeline of skills and expertise needed across the board to power their growth down the line.

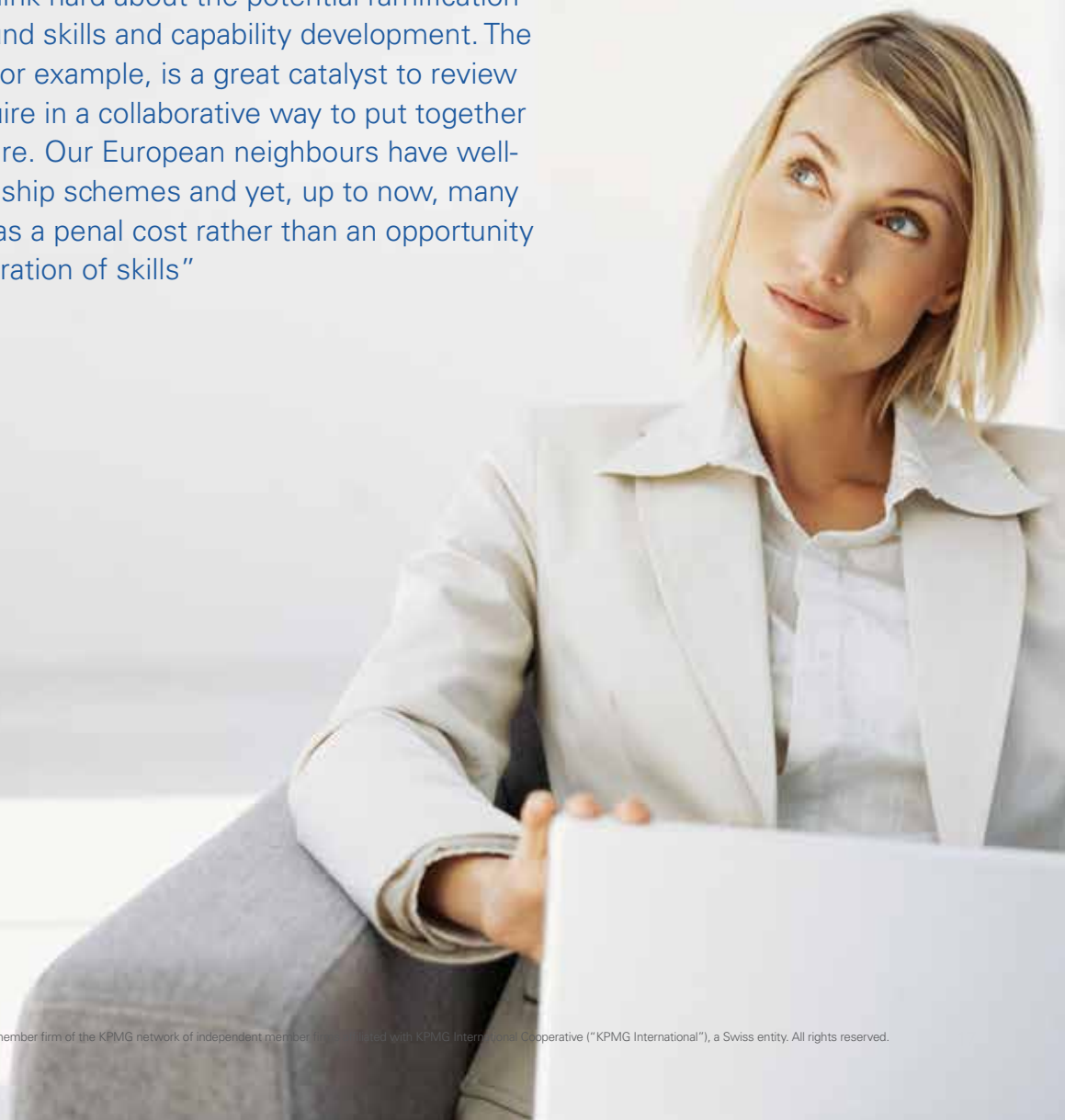
1. **Extensive workforce scenario planning and modelling** is vital in the context of Brexit in order to give businesses options, whatever the outcome of the EU negotiations. That includes interrogating the current operating model to assess the volume and expertise of people required to sustain it, against a backdrop of cost challenges (such as pressure from the minimum wage, the gender pay gap and the Apprenticeship Levy). Consider whether your business has a real service or product differentiator that customers would pay more for. Should more outsourcing be introduced? Or, even, should the services offered be changed entirely to accommodate the new staffing paradigm? It is also a perfect time to creatively rethink your supply chain, look at those of your suppliers and customers and think about where workforce gaps might arise.
2. **Employers need to be far more proactive and imaginative** in terms of their attraction strategies to recruit overseas workers – irrespective of immigration controls – investing creatively to reach the right people in the right places. For some, that will mean targeting new international locations outside of the EU, as well as within it; for others, a whole new strategy for drawing in EU nationals, building up an employee brand presence in places where they have not previously fished. Banks which may be relocating part of their business may start by thinking: 'what's the talent we now need and which campuses in which countries should we be targeting?'
3. **Businesses should also be considering investment in training and development** for UK citizens, using initiatives such as the Apprenticeship Levy as a springboard to train up local talent and develop a robust source of skills and capability.
4. **There is space for a major overhaul in the way employers approach pay and rewards.** One high street coffee chain, for example, is offering interest free loans on rental deposits to encourage young workers to move into the areas where they need workers. There's plenty of room to rethink the manner in which people do their jobs too, approaching their work lives in a far more bespoke way. That might mean enabling more staff to distance commute on a weekly, rather than daily, basis, or focusing more on remote working.
5. **Innovations such as robotics, AI and automation may play a major role** in mitigating any appreciable dent in the UK's skilled workforce. That could be anywhere from the factory floor of a manufacturing plant to the automated reading of case notes in a law firm. Brexit may not be driving automation, but there is every chance it will accelerate the conversations as part of the whole productivity/ pay roll/ skills gap landscape.

“Applications from the EU to UK universities are now down and that’s a cumulative problem with the pipeline of high-end talent – engineers with masters degrees, for example – which will be compounded over time. If firms want to compete globally at the top end – if you’re competing with the best in the world – you’ll need world class talent”

Tim Payne, Head of People & Change

“Businesses need to think hard about the potential ramification and opportunities around skills and capability development. The Apprenticeship Levy, for example, is a great catalyst to review the expertise you require in a collaborative way to put together a roadmap for the future. Our European neighbours have well-functioning apprenticeship schemes and yet, up to now, many UK businesses see it as a penal cost rather than an opportunity to nurture a new generation of skills”

Paul Martin, Head of Retail



Our services

People Consulting

KPMG can help you build a workforce plan ready to navigate the uncertainty of Brexit. More informed, more reliable and anchored in the needs of your business.

— **Workforce planning:**

Assess future skills requirements against current resources, and assess and plan the resources you need to meet your business strategy.

— **Workforce agility:**

Increase workforce agility so you can adapt to meet post-Brexit needs.

— **Workforce costs:**

Calculate the cost and productivity impact of Brexit on your workforce and understand your options for optimising workforce costs.

— **Critical skills:**

Develop a strategy to secure essential skills for the future and understand how to attract and retain talent in the new labour market. Get support for implementing Learning & Development strategies to help bridge critical gaps.

— **Workforce engagement:**

Engage and support employees who are EU nationals and ease the uncertainty they face from Brexit. Minimise the potential impact of losing critical elements of the workforce, as well as re-engaging and energising employees.

— **Legal services – immigration:**

Immigration is one of the most personal of business issues and can be extremely complicated within a constantly moving backdrop of ever evolving legal requirements. Never has that requirement been more acute, with Brexit approaching.

With extensive experience of providing immigration advice to both businesses and individuals, we can help ensure people are where they need to be and companies remain compliant.

Our team consists of fully qualified solicitors and accredited immigration advisors with experience of all types of UK immigration practice, from sponsor compliance for large corporates to working visas for individuals.

In addition, KPMG have over 500 immigration professionals in more than 85 locations globally, covering over 130 countries.





Why KPMG

— **Market-leading expertise**

Our workforce planning specialists already work with a wide range of organisations to help develop their people resources. We apply this expertise and experience to Brexit challenges.

— **Proven tools**

We use proprietary tools to help clients address their challenges more quickly and easily. These include our workforce analytics and strategic workforce planning toolkits, our Right to Work app and our apprenticeship diagnostic.

— **Ability to assimilate multiple challenges**

Our expertise spans the full workforce agenda. This means we can help organisations develop a coherent response that makes them better prepared.

— **Knowledge across industries, regions and markets**

Our industry teams and presence in all major markets means we can offer organisations insight grounded in a thorough knowledge of their sector and market.

— **Multi-disciplinary teams**

We can offer clients the full range of expertise they need: global mobility, tax, legal, technology and supply chain capabilities.

— **Our origin**

Leaning on KPMG's strong accountancy brand, we can help organisations understand the cost implications and the potential financial value of various scenarios.

Our people



Karen Briggs

Head of Brexit and Member of the Executive Committee of the Board, KPMG in the UK

t: +44 (0)20 7311 3853

e: karen.briggs@kpmg.co.uk

Karen is a member of KPMG in the UK's Executive Committee and is the firm's Head of Brexit, leading a dedicated team helping clients navigate through the risks and opportunities of Brexit. A forensic partner by background, Karen has been a partner at KPMG for 18 years, building a reputation in international regulatory issues and legal negotiations. Karen's experience ranges from money laundering and fraud investigations, to the provision of financial crime advisory services.



Punam Birly

Head of Employment & Immigration Legal Services and Brexit People Lead, KPMG in the UK

t: +44 (0)20 7694 4950

e: punam.birly@kpmg.co.uk

Punam leads KPMG's legal services focused on employment and immigration and is also the firm's Brexit lead on people. Punam is a solicitor of the Senior Courts of England and Wales and is a specialist in international and EU social security. She has advised companies on a wide range of immigration, employment, tax and social security matters, including global mobility and compliance for diverse global workforces.



Andrew Coles

Partner, UK Head of Pensions and People Consulting, KPMG in the UK

t: +44 (0)20 7311 1671

e: andrew.coles@kpmg.co.uk

Andrew works with a range of UK and international companies, advising on a variety of pensions and wider people related projects. His work has included advising clients on the pensions and people implications of major transactions, developing long-term approaches to pensions investment strategy, benefit change and reward strategy.



Mark Essex

Director, Public Policy, KPMG in the UK

t: +44 (0)20 7694 8219

e: mark.essex@kpmg.co.uk

Mark is KPMG's Director of Public Policy in the UK, currently leading an intelligence team analysing the impact of Brexit on business and the economy. With over 15 years of experience in strategy consulting, he specialises in problem solving using innovative critical thinking methods and has a track record for developing new approaches.



Mike Falvey

Partner, People Consulting, KPMG in the UK

t: +44 (0)20 7694 5597

e: mike.falvey@kpmg.co.uk

Mike is a lead partner in KPMG's People Consulting Practice. He advises clients in the UK and globally on HR solutions designed to address key talent issues and drive business performance. His key areas of focus are government, healthcare and workforce transformation. Mike previously worked as Corporate Services Director at Four Seasons Healthcare and Chief People Officer with HMRC.



Paul Martin

Head of Retail, KPMG in the UK

t: +44 (0)20 7311 8185

e: paul.martin@kpmg.co.uk

Paul is KPMG's Head of Retail and a well-known voice in the market on the global retail and consumer sector. For over 15 years, Paul has worked in over 60 markets with many of the world's largest retail and consumer goods companies. He joined the UK firm in 2015 through the acquisition of Boxwood, where he co-led the consulting practice for the retail and consumer sector. He has specialist interest in internationalisation and digital transformation.



Tim Payne

Head of People & Change, KPMG in the UK

t: +44 (0)20 7311 8002

e: tim.j.payne@kpmg.co.uk

Tim leads KPMG's People and Change practice, after 20 years supporting clients across all sectors, particularly regulated industries such as banking, life sciences and energy. Starting out his career as a chartered occupational psychologist, Tim specialises in helping clients through major change, particularly through HR transformations and cultural change in mergers and acquisitions. He also provides extensive insight into the challenges involved in workforce modelling.

kpmg.com/uk



The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavour to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

© 2017 KPMG LLP, a UK limited liability partnership and a member firm of the KPMG network of independent member firms affiliated with KPMG International Cooperative ("KPMG International"), a Swiss entity. All rights reserved.

The KPMG name and logo are registered trademarks or trademarks of KPMG International.

August 2017 | CRT084619 | Brexit survey