

Hiring plans and local suitability

Use one copy per country and proposed arrangement. Tick after reviewing evidence with your advisers.

Country / EOR or entity:

Evaluator / date:

Roles, work locations and intended business activities:

Initial hires: _____ 12-month hiring forecast: _____

01 Define the operating plan

- ☐ Record employee duties, working locations and authority to negotiate or sign contracts.
- ☐ Confirm whether you need employment support only or a wider local business presence.
- ☐ Agree hiring forecasts, intended duration and the reasons for choosing this arrangement.

02 Check local suitability

- ☐ Identify the legal employing company and any partners involved in the proposed EOR model.
- ☐ Ask local advisers to check suitability, required permissions and relevant restrictions.
- ☐ Arrange local review of contracts, working hours, leave, benefits and termination terms.
- ☐ Obtain a separate tax assessment, including potential permanent establishment exposure.
- ☐ Record advice, evidence, unresolved questions and approval owners before committing.

Responsibilities and employee support

Agree owners with your business, provider and local advisers before the employee starts.

03 Assign owners and controls

- ☐ Name owners for contracts, payroll inputs, approvals, benefits changes and corrections.
- ☐ Agree payroll deadlines, funding dates, error handling and employee escalation routes.
- ☐ Confirm data-sharing purposes, privacy roles and secure transfer arrangements.
- ☐ Check access permissions, retention, deletion and account removal responsibilities.
- ☐ Assign responsibility for required right-to-work checks and role-appropriate screening.
- ☐ Confirm local policy review, training ownership and routes for sensitive concerns.
- ☐ Record provider contacts, internal deputies and approval evidence for important changes.

Documents reviewed / unresolved questions / adviser follow-up:

04 Plan onboarding and communication

- ☐ Assign a manager; provide onboarding, relevant policies, training and team access.
- ☐ Explain which questions go to HR, the manager or the EOR, and check understanding.

Total cost and hiring decision

Compare like-for-like forecasts. General planning resource only; obtain local legal and tax advice.

05 Compare the full cost

Currency: _____ Period: _____ Hires: _____ Model: EOR / local entity

Salaries / contributions / benefits: _____ Service / payroll fees: _____

Setup / filings / advice: _____ Other / exit costs: _____ Total: _____

☐ Record refundable deposits separately; check FX, extra charges, renewals and exit terms.

06 Agree the decision and review triggers

HR owner: _____ Finance owner: _____ Local adviser: _____

Deposits / advance funding: _____ Review date: _____

Review when roles, locations, headcount, local activity or costs change; no universal threshold.

Transition checks: contracts / continuity / leave / benefits / payroll / employee communication

Open issues / evidence needed before approval:

Decision: [] EOR [] Local entity [] Further review required

Decision owner / next action / due date: