



UK's Response to COVID-19

Market Size Stats

- Professional and business services GVA contribution £186bn, almost 11per cent (£186billion) of the UK economy's gross value added
- (source parliament.uk)
- 4.6 million work in professional and business services (13% of employment)
- Digital technology turnover in 2018 = £184bn (Source great.gov.uk)
- 30 significant technology clusters across the UK
- 200,000 tech companies in London alone
- More than 2.1 million work in the technology industry

Main challenges for the sector in the UK due to C-19

- Wellness of the workforce
- Secure delivery and remodelling of services
- Tightening of budgets

Employee Safety and WFH

The latest furlough figures show the wages of 9.1 million temporarily laid off workers are being subsidised by a government furlough scheme.

Circa 80% of employees switched to WFH within the first 2 weeks

John Lewis had 92% WFH within 17 days

NHS Shared Business Services: As part of our commitment to safeguard our own workforce, we transitioned almost 100 per cent of our UK workforce to home-working by the start of April. This meant an additional 900 office-based staff were enabled to work remotely within just a two week period.

TCS enabled 96% of its workforce to work remotely, saw increased collaboration among its employees- 58K+ meetings, 807K+ calls, 34000K+ messages, 113k Group Sessions in a month. TCS credited its employees salaries early and maintained 95.6% SLAs to resolve queries

TCS has announced that by 2025, only 25% of TCS workforce will work out of TCS facilities at any time, with associates spending only 25% of their time in the office.

Aviva witnessed a 15% increase in productivity of essential services (5% of all services) when India entered lockdown.

GSA's trust survey shows an increase in trust across partnerships throughout COVID-19 from 7.13/10 before to 7.61/10 now. It also showed a 9/10 positive performance ranking in companies move to WFH

74% of respondents say over 80% of their company's services are now being delivered from homeworkers

Customer Quotes

"We were all taken aback with the interruption due to COVID19 but were heartened to see the collective and collaborative effort between EXL and our teams. EXL's response was rapid and effective with from no home working to 1000+ resources working from home within few weeks. EXL's out of the box thinking with analytical (MIA) and RPA solutions ensured we keep serving our customers during this difficult time. This has been a true testament of our collaborative approach and strategic partnership." – Head of Operations (Business), Centrica (British Gas)

About NHS Shared Business Services:

Peter Burnett, Director of Operational Finance, Surrey and Sussex Healthcare NHS Trust, said:

"Thank you for your outstanding efforts during this challenging COVID-19 period. I can only imagine how difficult it has been to keep services fully functioning when faced with the staffing issues you have been faced with. Throughout this period your F&A services have always been there. Like a constant electricity supply, one push of the switch and the lights always come on."

In response to the work of NHS Shared Business Services' IT Service Desk, Richard Matt, Associate Director Business Technology, Cambridgeshire and Peterborough NHS Foundation Trust, said:

"I want you all to know that your help and dedication is enabling frontline NHS clinicians and support staff to continue provide care to our patients during these unprecedented and uncertain times. Your hard work is making a real difference and for that I salute and thank you."

James Kendall, Head of Workforce Intelligence, Medway NHS Foundation Trust, said:

"Make sure they're [payroll team] aware of how valuable and appreciated the work you guys are doing is – just as vital as anything on the frontline, as no pay equals no staff!"

About Parseq's performance from clients:

Mark Fairclough, Thinkmoney

"Parseq has been on the front foot on every angle since the start of the COVID-19 outbreak. What you've successfully implemented has meant that critical payments and vital support for our customers have been able to continue during these very uncertain times. This would not have been possible without your levels of proactivity, transparency and sheer resilience. Your daily updates have been exceptional and the best we've received from our supply chain partners by far."

Bernard Smyth, Post Office

"What you and your team have done and are still doing since the lockdown, and the level of service provided to the financial services sector, has been fantastic. Well done to all at Parseq and a massive thank you."

Hayley Jones, Lloyds Banking Group

"Thank you to you and your colleagues for your commitment and professionalism to ensure that not only the lights are kept on, but to manage to process the high volume of requests that you have had over the last few weeks and the questions that have been asked of you from a number of your clients in relation to contingency/resilience. I will feed this back up to our Group Incident Response Team and the Exec to share the good news story. Thanks again for all of your support."

Sean Dore, HSBC

“The communication throughout this episode has been exemplary.”

Examples of Technology Acceleration

Examples of where technology acceleration has already been seen and executed for example in Healthcare, enabling the government strengthen its fight against COVID19, Education tech and any other sectors that you wish to highlight.

The British Parliament, which for the first time in its history has introduced “virtual” sittings and remote electronic voting – both considered unacceptable only weeks ago. Business decision-makers in all sectors can no longer resist the need to be a digital organisation and the ability to respond rapidly to unpredictable change.

As another example of how digital transformation is accelerating in previously laggard sectors, look at Sussex University, where a digital strategy carefully crafted over the past 12 months had to be largely implemented in two weeks when lockdown started. The CIO’s comments are typical of what a lot of IT leaders are saying: “These are exactly the things that we wanted to do in the next five years – but, instead, we’re doing it now.”

Perceptions of technology projects are changing. New tech is being implemented in weeks, not months; firms that stuck to old, non-agile ways of working are unable to respond; business leaders are open to new tech like never before. The way that IT departments work, and their relationship with the business, may never be the same.

Shared Services Connected Ltd (SSCL) is a unique joint venture between global IT provider Sopra Steria and the UK Cabinet Office. It provides the full range of business critical services for the largest Government departments and the Metropolitan Police including Finance & Accounting, Procurement, HR, Payroll, Resourcing and Pensions Administration. As the COVID-19 pandemic took hold of the UK, SSCL had a key role to play in the continuity of critical services to keep the UK Government and the Metropolitan Police fully operational. SSCL employees were identified as KEY WORKERS, providing Business Continuity and resilient delivery of HR, Payroll and Supplier Payments for the largest Government departments and the Met Police.

A priority for SSCL was to ensure the health and wellbeing of its 2,500 employees located at four Centres of Excellence in the UK and two in India.

SSCL employs 1,840 UK employees.

- 900 desktops were enabled and set up to work from home in less than a week for both Government and Police colleagues.
- Contact Centre services moved to home, implementing high security software from desktops and specialist headsets.
- Maintained Contact Centre performance throughout April at 100% against Service Level Agreements for all HR and Finance queries.
- Enabled LiveChat for all staff of Department of Work and Pensions and Ministry of Justice (within four hours of obtaining client agreement to roll out).
- SSCL had 93% of SSCL Government employees working from home and 99% of SSCL Police – completed in less than a week.
- To date they have delivered three lockdown payrolls and June’s payroll is on target.
- SSCL is still paying approx. 530,000 employees each month successfully and on time.

SSCL latest figures for Net Promoter Score show March NPS – 15. May NPS +16 - a real measure of the fantastic levels of service delivered through the crisis.

Tech trends

Technologies supporting remote working became the immediate priority for every organisation that could do so. Previously, fewer than one in five IT buyers saw video / web conferencing as a spending priority – lockdown has been the best thing that's ever happened to Zoom and Microsoft Teams. Collaboration software, unified communications and VPNs have become essentials. But beyond these technologies, the crisis is also driving change elsewhere.

- ATM withdrawals have dropped by 60% in the UK during lockdown. Contactless payments were already growing but have become the default. This will only lead to more branches being shut, with further growth in online and mobile banking services, and the infrastructure needed to support them.
- Digital government
Authorities at all levels have had to develop and launch new online services in record time, and generally are doing a pretty good job of it. This could – should – revolutionise public service delivery, sending more people online, and hopefully becoming more responsive to public needs than the traditional bureaucracy has allowed.
- Digital healthcare
GPs and hospitals have resisted calls for digital transformation for years. Before March only 10% of UK GPs used video consultations – by the end of April, 75% were doing so. Microsoft Teams has been rapidly rolled out across the NHS with more than 160,000 accounts set up by the end of April. The NHS 111 online service used to get 10,000 users a day before the outbreak - in March the daily average was 548,245. The pandemic is proving to be the kick the health service needed to properly embrace digital transformation, and a reason to prioritise IT budgets.
- Education / remote learning
Many schools have done a remarkable job of moving from classrooms to using online learning tools such as Google Classroom. Schools have been short of computers and digital skills for years, but the sector will have to invest in preparation for the risk of future local, partial or even national lockdowns ahead. Universities that rely on overseas student income will need to ramp up their digital outreach and online teaching services to cater for people no longer wishing to travel. The concept of a digital campus will become standard.

Examples of CSR

GSA member Aviva's commitment to social causes

- ABI Covid-19 support fund - joining arms with the insurance and long-term savings industry to launch the Covid-19 Support Fund. The aim of this fund is to raise £100 million to donate money to the many. It's essential that we all play our part so we're supporting this vital work with an £18.5m donation from Aviva to help ensure no one is forgotten and help is always available in every community at this time.
- NHS Charities Together support - £5m donation supporting the NHS in three key areas: welfare and wellbeing for NHS employees, volunteers and patients; assistance for patients leaving hospital; and long-term mental health support for NHS workers.
- Free breakdown cover, free courtesy car and free advanced personal belongings cover for NHS workers who hold an Aviva policy and extended to include NHS volunteers.

- Red Cross - Since the outbreak of the virus, Aviva have committed to an additional donation of £10 million to the British Red Cross so they can accelerate their response, reaching more people – and quickly – to ensure those made most vulnerable by the coronavirus outbreak can get the right support at the right time.

The role of our industry in helping economies bounce back

The UK represents buyers and providers across both technology and business services. We see this space as front and centre of the UK's restart strategy.

The service provider 2.0 model will accelerate and companies will take an automate first approach, work to new contracting models and rapidly adopt gig working, as buyer attentions turn to more rapid digital transformations and delivery of innovative solutions.

Wellness of the workforce has accelerated up he agenda of all organisations – and this cannot and will not slide back down. Ethics and sustainability will prevail.

The last few months have seen an exponential increase in the use of technology. Governments, work, education and health has been enabled by technology across the world and there has been an exponential increase in collaboration tools for use in health, work and pleasure.

By far this is the greatest period of change that we are seeing in our lifetimes, and our industry is at the centre of it. Over the last few years we have talked Digital, but now we are truly seeing the Digital revolution.

The Digital Revolution is here. A cashless society is a reality. Virtual is the new norm, and all organisations are rethinking Physical. The High Street as we know it will not exist. Schooling, learning, working and health will become business as usual to be virtual and Digital. Tech is at the heart of our new society. All surveys and studies across the globe are indicating CEOs and companies are in the majority accelerating Technological Transformation.

The economy will be challenging with most views being that it will take at least 2 years from now to return to current levels. History demonstrates that sourcing significantly peaks in such times for cost reasons. We will see a new version of outsourcing, which it not of the 'your mess for less' characteristic.. but transparent value output based services highly enabled by automation and cloud.

Can we predict the next 6 or 24 months though, as every day so much changes and forecasting somewhat futile. However all businesses are searching for potential answers, new ways of working, best practice and ideas from across the globe. The GSA has a pivotal and central role in helping our members and the Industry globally with this.

Our industry is at a pivot point to true Digital Transformation. The GSA will make and help that pivot happen for our members and the Industry.