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The Future of Business Continuity & Resilience Report 2021



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Foreword

In 2020, the BCI published its first Future of Business Continuity and Resilience Report. At the point when that survey was carried out, it was only six months after an outbreak of an 'unidentified pneumonia' first hit the headlines and many business continuity and resilience managers were still grappling with how to respond to a crisis with such a global reach and longevity. In some cases, others felt unsupported by management who took a "closed door" approach; executing and adapting with new plans for the situation that in some cases were siloed from established business continuity strategies.

This year's report shows a reformed picture. Last year, only a third of organizations had a board or senior management member who was responsible for promoting resilience throughout the organization. This year, the figure has gone up to two-thirds. Some of this can only be credited to the work many professionals have done in the past year to 'sell' the importance of business continuity in creating a resilient culture to senior management.

Indeed, out of chaos, opportunities arise. This has been the case for business continuity and resilience professionals over the past year with many positive changes becoming the new standard in organizations. Management is engaging more in the planning process, previously disparate departments are coming together and sharing best practices to help enable a resilient organization, BC managers are holding interim review meetings during this elongated response to make potentially organization-saving changes to practice rather than wait until the formal post-incident review, and more BC managers are now being involved in strategic decision making as a result of the positive outcomes achieved during the pandemic.

Furthermore, the future of workplace recovery appeared very bleak after last year's report. This year, as many organizations return – or partially return – to the office, just 18% will not be seeking to renew their contracts at all. Requirements are changing, however, and customers are becoming more demanding and innovative with requirements: they want more flexibility in contracts, options for homeworker resilience, and specific systems backup for events such as cyberattacks. Such challenges are likely to make the workplace recovery market an exciting area for change over the next few years.

Despite this report painting a positive future for our industry, there are concerning gaps which need to be addressed, particularly because now organizations not only need to ensure that their offices are resilient, but also that those working in remote environment receive identical planning consideration. The report shows this is an area where a lot of work still needs to be done.

Although it may have been hard to believe this time last year, we are still very much formulating what the future of our industry will look like, but we are in a more positive place than a year ago, and business continuity is showing itself to be the foundational element of a resilient organization.

We would like to thank ResKube for their continued support of this important report for our industry, as well as those who took time to answer the survey and participated in interviews to provide such ground-breaking findings for our industry.



Christopher Horne FBCI
Chair of the BCI



Foreword

This is the second time we have looked back at the pandemic.

The first time around we thought we had learned the lessons to adapt to the way the world had changed. This report shows us, a year further on and still in the grips of the pandemic, that the world and our profession within it has changed yet further. We are very pleased to be partnering with the BCI to deliver this report on a global survey charting this change and our response as professionals and as organisations.

The pandemic has affected us for much longer than we were anticipating when we first ran this survey. We can now see that many of the changes to the way we work and to how we run our organisations will remain with us into the future.

This report shows that, as a consequence of the benefits seen over the past 18 months, there is now a greater appreciation of Business Continuity at board level and more widely in our organisations. However, some of the anticipated cross-silo collaborations have yet to materialise. Business Continuity has been given a more strategic position in management minds, however, and is seen as a competitive advantage.

The past year has seen the temporary shift to homeworking become fixed in our psyches. A McKinsey Study – Reimagine Work – showed that most people wanted to continue working from home for three days a week after the pandemic. A further survey by EY in April 2021 showed that nine in ten respondents want flexibility in where and when they work and 54% will consider moving job if they are not given it.

This move to hybrid working has meant that we, as service providers, have had to adapt fast.

For example, this report shows how many were frustrated with restrictions in the Work Area Recovery (WAR) services that prevented their use for split working. These restrictions were necessary to manage customers' service risk but did not take the pandemic scenario into account. We need to develop more flexible services for the future. The respondents in the report have asked us to innovate and develop relevant and flexible WAR services that assist at times of cyber-attack.

We are also asked to develop services that help provide resilience to homeworking staff.

Aside from pandemic and cyber-attack, natural disasters feature prominently in our minds, because of the multitude of major storm, extreme heat, extreme cold and wildfire events that we have seen in recent months. However, these dramatic and devastating events are thankfully rare. We must build resilience to cope with the daily interruptions to power and to communications that more frequently affect our newly hybrid workforce.

As infrastructure is adapted to support the hybrid worker, security and resilience provisions must be integral to our daily operations to reduce our organisational risk.

The UK is seen to deliver relatively stable power and internet to homes. However, a USwitch report published in July showed that 14.8 million UK homes were interrupted by a significant loss of internet, often caused by power cut, over the preceding year. This had an estimated impact of £5 billion loss to UK businesses. These events, along with the on average 80 major power cuts every day across the country, demonstrate that we still need to consider our critical homeworkers' resilience.

This report shows that 52.7% of respondents have not yet begun looking at homeworker resilience but will do soon. Some are using the office as fallback for the homeworker, flipping the old ways on their head. This is "disaster recovery" provision rather than true resilience, however.

As ResKube, we find that 5-10% of homeworking staff fall into a category that requires true power and communications resilience in the home. This is to ensure that critical work or decision-making are not interrupted and that time critical work is completed on schedule. It is for these employees that we have developed the ResKube solution.

I hope that you find this report a valuable insight into the views of your industry peers from around the world, giving you an understanding of the key lessons learned from yet another eventful year.

Andrew Lawton

Founder & CEO, ResKube



The Future of Business Continuity & Resilience 2021

Executive summary



Executive summary

The role of the BC manager is becoming more strategic: For the first time, we have seen the role of the BC manager become more 'strategic' than 'operational' — the average rating provided by professionals was that their role was now 59% strategic and 41% operational. Whilst continuity of operations remain the core focus for professionals, senior management have been showcased the knowledge and expertise of BC teams throughout the pandemic and are now seen as the cornerstone to building a more resilient organization post-pandemic.

Remote working is now commonplace in the corporate world — but this is leaving organizations exposed to potential failure: Less than half of organizations (46.3%) have the same standards of resilience applied to homeworkers as they do for office workers, with health and safety requirements being given even less consideration. Just a third of organizations have made considerations for back-up power and communication for workers performing critical activities within a remote environment.

The Chief Resilience Officer is no longer a distant hope for BC professionals: BCI research has shown that BC and resilience professionals have been asking for a 'voice' on the board for many years now - and they are finally getting it: Although many still have to meet this utopia, the pandemic has helped to bring resilience to the core at senior management level, and more than two-thirds of organizations have an individual at board/senior management level who is responsible for promoting resilience at all levels within the organization. This is up from a third only a year ago.

Being a good planner is still an important trait in a BC manager, but for the post-pandemic BC manager, people skills are crucial to success: BC managers now need to be collaborators, they need to be facilitators — and they even need to be salespeople within the post-pandemic world. In order to get — and continue to keep — senior management engaged, they need to continue to sell the importance of resilience upwards. Whilst 'command and control' cultures may work in some crisis scenarios, attributes such as 'commanding', 'ordering' and controlling are now at the bottom of the list.

Professionals believe planning needs to become more inclusive, adaptable and reactive: More than three-quarters of respondents believe that department leads across the whole organization should be better involved in planning processes, and a similar number believe that BC documentation should be made available — and promoted — across the organization for other purposes (such as resilience building). There are also signs that the planning processes should be fluid and more readily adaptable to incidents: many are carrying out management-lead interim reviews and incorporating changes into planning and processes whilst the incident is still ongoing rather than waiting for the post-incident review.

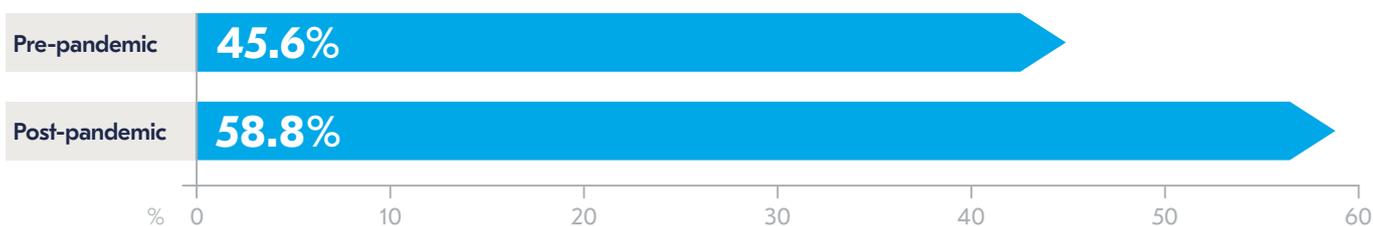
Work area recovery (WAR) is far from dead, although customers will be more demanding in what they require from their provider: Sentiment regarding work area recovery providers is more positive than it was a year ago and, of those who previously used a WAR provider, a third will continue to do so, and a further third will continue although will be scaling back their contract. There will, however, be changing demands from customers: nearly a third require resilience for homeworkers to be included in contracts, whilst 47% would want specific back-up for systems and infrastructure in the event of a cyber-incident. Nearly a quarter would, unsurprisingly, require more flexibility in contracts, with the ability to use the workspace for split-team working a top consideration.

Resilience and Organizational Structure

BC's role has become increasingly strategic throughout the pandemic

Pre-pandemic, professionals rated their roles as 55/45 operational/strategic. The balance has now shifted to 41/59 as BC managers were required to operate at a more strategic level during the pandemic.

Respondents' rating of how much of their job is now taken up with strategic activity



Management are becoming more aware of the importance of resilience – but staff still have a way to go

40% of management teams are “very” aware of the role of resilience in an organization, compared to just 16% of staff. Given the report shows that it is people – rather than processes or technology – that are key to a resilient structure, there is still significant work to be done in organizations.

The percentage of management and staff who are “very” or “somewhat” aware of the role of resilience and business continuity in their organizations

Resilience



Business Continuity



Somewhat aware

Very aware

The new workplace

The majority of staff now expect to do some or all of their work remotely – how will this change BC?

94% of respondents shared that some, most or all of their staff wanted to work from home for a proportion of time post-pandemic

Percentage of staff wanting to spend a proportion of time working from home, regardless of role



26.4%
All staff



47.2%
Most staff



20.8%
Some staff



1.9%
Most staff would rather remain in an office environment

Despite the growing trend for remote work, less than half of organizations have the same standards of resilience applied to homeworkers

Just 46% of organizations admit to applying the same standards of resilience to homeworkers as office workers

Are the same standards of resilience applied to homeworkers as they are to office workers?



18.5%
Yes, this has always been the case



27.8%
Yes, we ensured this during the pandemic



13.0%
Not yet, but we are actively planning this now



20.4%
No, we relaxed during the pandemic but plan to ensure this going forward



11.1%
No plans as yet

Health and safety standards are applied to an even lesser extent

Less than 1 in 5 organizations say the same health and safety standards are applied to remote workers as they are to those working in the office.

Are homeworkers required to meet the same health and safety standards and guidance as they are in the office?



19.0%
Yes, exactly the same as in the office



36.6%
Somewhat, but more needs to be done



11.7%
No, but we are putting plans in place now



27.1%
No, and we have no plans in place to do so

Staff wellbeing is only a consideration in half of organizations' BC plans

Although sometimes health and wellbeing falls outside the remit of BC planning, many professionals now report it is an active consideration as they move towards overall organizational resilience.

Is staff health and wellbeing now considered in BC plans?



50.0%
Yes



13.0%
No, but we are planning to do this



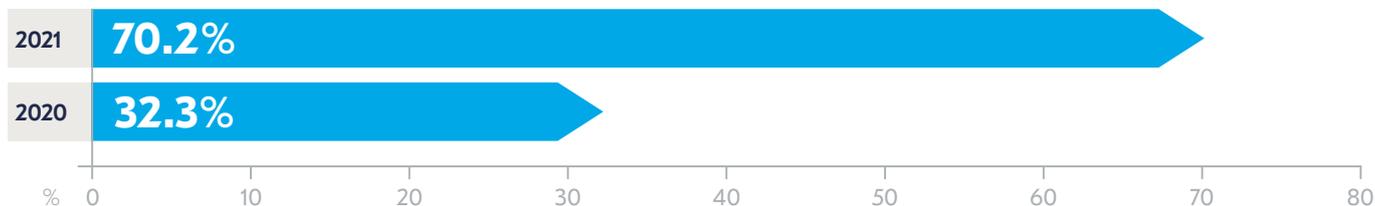
29.6%
We have no plans to do this

Resilience at board level

More than half of organizations now have a board level member with responsibility for resilience

Having someone on the board responsible for promoting resilience is a key tool in building resilience across the whole organization. More than two-thirds of organizations do now have someone in this position, up from just a third a year ago. The significant increase is backed up in interviews.

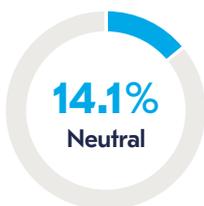
Do you have someone at board or senior management level who is responsible for promoting resilience at all levels within your organization? Percentage answering "yes"



The pandemic has fast-forwarded the importance of resilience to organizations

COVID-19 has seen organizations' appreciation of resilience rise; testament to the widespread creation of a specific role to promote it.

How has the appreciation of resilience risen in your organization as a result of the pandemic?



The new business continuity or resilience manager

The new BC manager is a teamworker, a collaborator, a salesperson and an agile planner

The importance of "selling" BC and resilience to the organization, showing agility in planning and working collaboratively are the new modern traits of a BC professional. Authoritative and commanding behaviours – and even a high degree of academic qualification – are no longer hailed traits.

Percentage of respondents saying a trait is "important" or "highly important" for a BC manager

Highest rated traits:



90.0%
Facilitator



89.2%
Problem solver



89.2%
Inspires others to solve problems



89.0%
Planner



88.0%
Demonstrates agility

Lowest rated traits:



25.8%
Gives orders



28.4%
Controlling



34.3%
High level of academic qualification



35.8%
Risk averse



59.7%
Formal authority

Planning and Process

Planning needs to be a more inclusive process

More than three-quarters believe that department leads across the organization should be better involved in the planning process, whilst two-thirds think BC planning documents should be made available for other purposes across the organization

How BC professionals believe the BC planning process should change – Top 5 responses



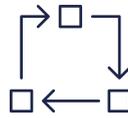
76.2%

Department leads should be better involved in the BC planning process



66.1%

BC documentation should be more accessible for other purposes (e.g. resilience building)



56.4%

The BC planning cycle should be reviewed to during an elongated crisis to ensure continued cover should business priorities change



53.8%

During an elongated crisis, plans should be regularly reviewed and altered to be relevant to the crisis stage



52.1%

The board should be fully engaged with the BC planning process

Organizations are conducting exec-lead interim reviews rather than wait until the undefined end of the pandemic to conduct a full post-incident review (PIR)

41% of organizations are conducting regular reviews during the pandemic and incorporating those changes into strategy before the crisis is over. Many will still conduct broader PIRs at the end of the crisis, but interim reviews often mean organization-saving changes can be implemented to processes before it is too late.

How are you planning to conduct a PIR within your organization?



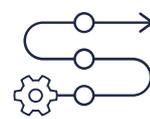
48.9%

We have a procedure led by the exec with input from across the organization



40.7%

We conducted interim reviews where we made changes to plans



29.5%

Different parts of the organization have their own procedures but there is no central process

Resilience in a new working world

The majority of organizations plan to use homeworking as an back-up option in future crisis

Although many organizations are fully or partly moving to a remote environment for all activities, it will now be considered a backup option for most organizations going forward

How are you considering workplace resilience and homeworking going forward?



36.2%

Remote working has proved to be successful and will be an option in our BC response going forward



20.9%

Remote working will be an option in our BC response going forward but we need to make changes to improve the power/communications resilience of staff who undertake critical activities



9.2%

Remote working worked in this scenario, but we would prefer to have a centralised physical environment in future crises



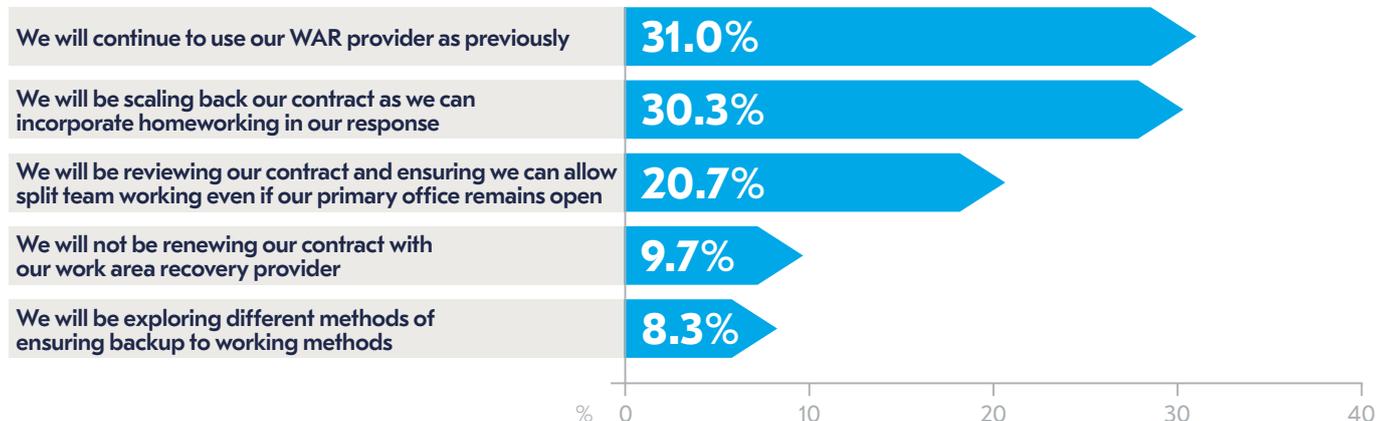
8.5%

Our measures will not change as we require a specific physical working environment

Work area recovery is not dead – customers just have changed requirements

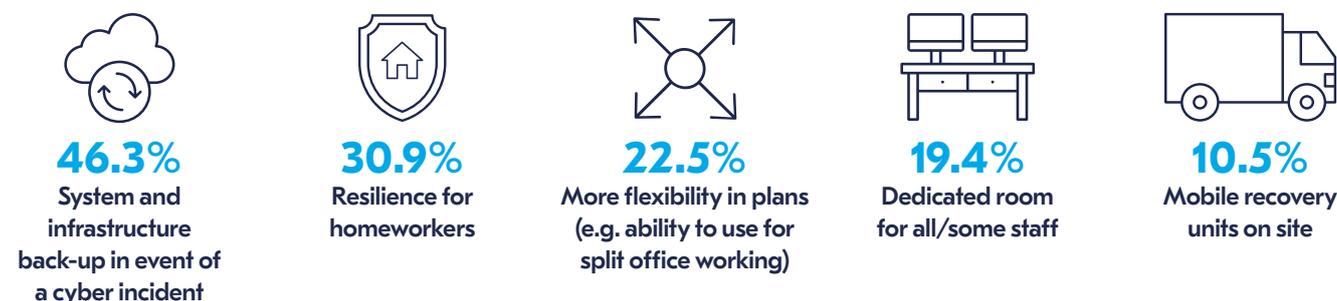
Of those organizations who already had a work area recovery provider, nearly a third still plan to use it as previously, another third will be scaling back their contract and a fifth want to ensure the provider will cater for split team working.

What are your views about the future of work area recovery (WAR)? (Respondents who used work area recovery only)



WAR recovery customers are no longer seeking back up for office workers, but they also require resilience for homeworkers, more flexibility and back-up for specific incidents

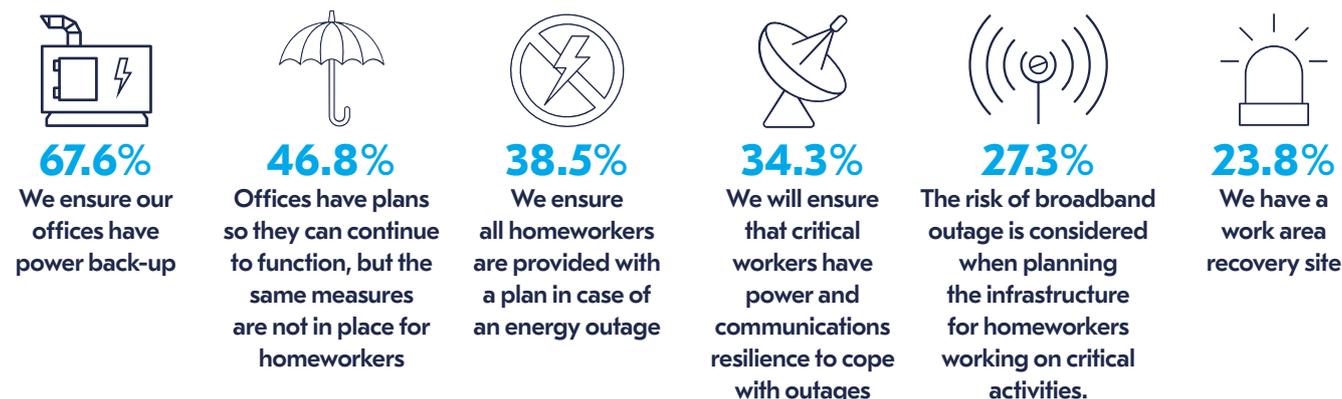
What services are you now looking for in a Work Area Recovery provider?
Percentage of respondents marking the option “essential” (top 5)



Remote workers do not have the same resilience measures applied as those in an office

Two-thirds of offices have power back-up, yet only a third of remote workers have power and communications resilience considered in plans

Considering some of the events that have happened in the past year related to extreme weather as well as areas plagued by regular power outages, how are you ensuring your workers are resilient?



Resilience and organizational structure





Strategic vs operational

- **The pandemic has led to significant shift in the view of BC (business continuity) within business – it is now straying beyond the realms of a purely operational division. However, this shift has not been universal, nor overwhelming.**
- **Board-level roles with responsibility for resilience becoming more common and popular – it now tips the 50% balance in respondents' organizations in 2021.**
- **There is a substantially greater appreciation of BC and resilience within organizations – more so at executive level than amongst staff as a whole.**

The persistence of the pandemic has created an interesting comparison between last year's Future of Business Continuity Report and this year's version, not least in terms of resilience and organizational structure. At the time of the 2020 survey, many respondents were still in – or just emerging from – their first phase of lockdown, and were hopeful that further rounds of restrictions may be avoided. Others, meanwhile, were seeing the second wave of infection approaching over the horizon and beginning to consider the BC implications of a multi-year interruption to normal operations.

By the time of the 2021 survey, it was apparent that the pandemic as a BC issue was going to be with us well into 2022 and probably beyond, despite many governments choosing to ease restrictions and gradually liberalise international travel and trade. Accordingly, although the questions asked in the survey differed substantially, the 2021 report offers much in the way of interpretation of the 2020 results as well as of its own – how accurate was the ‘snapshot’ offered by the 2020 results, in light of what we know now? What difference has the year made to BC professionals’ views of their place in their organization and to their organization’s attitude towards resilience? Now the pandemic is becoming less of an intermediate crisis and a long-term issue to manage, how are business continuity plans altering to manage this changing crisis?

“Overall we have huge opportunity ahead of us. I hope that across companies at an executive level, they remain open eyed and open minded in terms of what business continuity, crisis management and organizational resiliency has been able to offer them in a positive way and they will now continue to see it as an essential pillar of their business. With that appetite there, they will be able to resource it and also give it the time and attention that it should have.”

Head of Risk, Healthcare, United States

Before the pandemic, the role of the Business Continuity Manager was:



Now, the role of the Business Continuity Manager is:



Figure 1. The role of the Business Continuity Manager

One change revealed by the survey – which was in line with expectations, but none the less notable – was the shift in the role of the BC manager from primarily operational to more strategic. Respondents were asked to rate the role of the BC manager pre-pandemic and post-pandemic on a scale of 0 to 100 (where 0 was entirely operational and 100 entirely strategic). Respondents’ average response for the pre-pandemic era was 45, whereas the pandemic has shifted this in the current environment is 58.8. This represents a substantial increase in the view of the role as a major contributor to the strategic direction of the business, and while not

a seismic shift (with the modal answer being 50 in both cases), it indicates a clear direction of travel, particularly when combined with answers to other questions in this survey. BC professionals told how the ‘spotlight’ they have earned during the pandemic has given management an appreciation of the wide breadth of knowledge BC and resilience professionals have of the business. Whilst they may not be able to provide advice on new strategic direction, they can certainly be asked for opinions on whether a new strategic direction would work from a business continuity perspective.

Indeed, professionals who were interviewed for this report cited many reasons for their role becoming more strategic: management signalled a much greater appreciation of the insight that BC and/or resilience teams have on the organization and closer relationships were formed with management as a consequence. This, in turn, has meant management increasingly asking for BC's help and insight on new strategic directions. Furthermore, the longevity of the pandemic meant BC had to increasingly take a more consultative approach within the organization.

An interviewee discussed how their department is pushing to become more involved in strategic decision making as a result of the pandemic, and was also finding that talking about 'resilience' and the strategic side of BC actually formed as an aid to be seen as more than 'just the department that asks people to fill in boring forms.'

"We're trying to push the strategic part at the moment. My manager really wants me to get in on that because the reality is the operational disruption in an incident is often relatively mundane, and it's actually more about the strategic challenges. So, for example, if all of our Chinese students disappeared overnight, what would that mean? There were some problems in Australia a few years ago where the Indian student market dried up entirely because of one issue in another state. So it's coming down to resilience and risk to see these sorts of things or where the convergence of issues come together. There's a real push to include this strategic side because ultimately, it's just really good risk planning."

BC Manager, Higher Education, Australia

"The challenge post-COVID is to not just be the person that says, 'Can you update your BCP every three months' or 'Can you do this tedious, boring piece of thing that have no value?'. I have to be the person that's talking about that strategic side and that resilience side because otherwise, I'm just the person that makes them update some boring paperwork. Really, it's about progressing the conversations and deepening that. It's a bit hard for our organization because we started from such a low level of maturity."

BC Manager, Higher Education, Australia

"There were previously a number of executives at the time about who didn't really understand what I did and didn't understand how we operated. So I would say a couple of them underappreciated what the role was and what the contribution was. But there were others that did who I would look at as my trusted partners at an executive level. Now we're moving on as an organization, I'm re-establishing what I do in the organization. One of those trusted partners is a firm advocate of what I do and how we operate as well as how my boss and I operate as a team. So we're beginning to try and establish that within the new organization and they have endorsed us to a degree. We've been asked to build a program out, which incorporates the crisis management piece."

Head of Risk, Healthcare, United States

Part of this appreciation stems from the use of the word 'resilience' being more readily used in organizations. Resilience is a term which senior management appear to resonate better with rather than business continuity. Indeed, respondents reported that 40.0% of senior management teams are "very" aware of the role of resilience compared to 38.6% when asked the same question for business continuity. This represents a small increase in positive responses compared with 2020. Interestingly, staff are more likely to be 'very' aware of the role of business continuity (20.0%) rather than resilience (16.2%) suggesting that resilience is still primarily a concern of senior management and a more strategic consideration. However, the lack of understanding by most staff suggests there is still much work to do in getting the body of the employee population educated in the part they play in the organization's overall resilience.

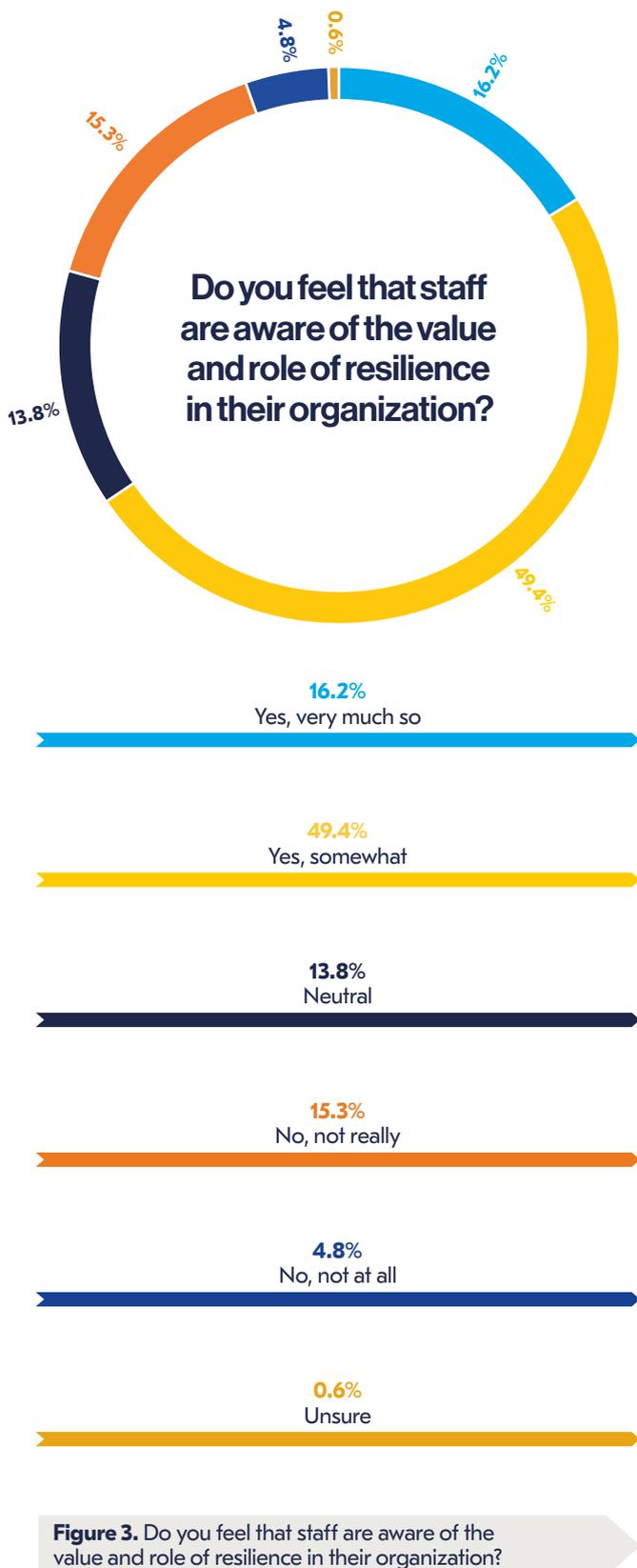
The acute uncertainty and instability that characterised the global economic environment in 2020 has eased somewhat in 2021. Governments, organizations and society as a whole have gradually (and in some cases suddenly) moved back towards a form of operations that would be recognisable from the pre-pandemic era or have implemented changes to adapt their organization the post-pandemic environment. However, there is still a long way to go before 'business as usual' can be attained. The challenges to business during a pandemic highlighted in the BCI's Pandemic Recovery Course¹ remain in many cases:

- Reduced human resource supply, including regular employees or availability of subcontractors or temporary employees.
- Customer orders cancelled or not fulfilled.
- Interruption in getting supplies or materials (especially if imported by air or land, including goods that go through international borders and customs).
- Change in demands (for example, increased internet use, decreased tourism/travel).
- Reduction or restrictions on public meetings or gatherings (including sports, clubs, theatres, community centres, restaurants, religious gatherings, etc.)
- Restrictions on travel (regional, national or international).
- Restrictions on working arrangements.
- Disruptions in other services such as telecommunications, financial/banking, water, power, fuels, medicine, or the food supply.



Figure 2. Do you feel that the board/exec team are aware of the value and role of resilience in their organization?

1. BCI, The (2020). BCI Pandemic Recovery Course. Available at www.thebci.org/product/bci-pandemic-recovery-course.html (Accessed 16 September 2020).



The fact that every organization is at its own unique point along the road to recovery can exacerbate some of the issues highlighted above, even as the overall environment shows gradual improvement. For example, disruption to supply chain was taken as a given for much of 2020 as organizations suspended or greatly reduced operations and global transportation channels faced huge levels of disruption. In 2021, the picture is less predictable worldwide as the regulations in jurisdictions vary more widely, are often applied at a more regional level and are now subject to workarounds. Even if we are closer to normal activity, it is sometimes no easier to predict how normal any individual action will be, and this has implications at both operational and strategic level.

However, many organizations have used the learnings from COVID-19 to help them counter future problems developing. The issues encountered during COVID-19 have prompted organizations to think in advance of potential issues and tackle these far enough ahead to thwart problems developing. Retailers, for example, are acutely aware of supply chain issues and a number of retailers have already chartered ships ahead of the Christmas season to ensure they have the required stock².



2. Simpson, E (2021). John Lewis charters ships to ensure Christmas stock arrives. The BBC; 16 September 2021. Available at www.bbc.co.uk/news/business-58581812 (accessed 28 September 2021)



The 2020 report identified four broad groups of companies in terms of strategic responses to the COVID-19 pandemic:

Group 1

These are the “key” or “front-line” organizations who have a legal and/or moral requirement to continue the provision of services to the citizens to the changed environment.

Group 2

These are organizations whose business operations are largely unaffected by the health risk interventions. For example, organizations that already operate remotely.

Group 3

Organizations who are flexible and adaptable and willing and able to adjust to the changing circumstances.

Group 4

Organizations whose business model is wedded to mass gatherings or social interactions such as hospitality, travel and leisure who are unable to adjust and therefore have to “wait it out”.

While 2021 has seen a number of shifts within individual organizations’ attitudes to their operations (for example, some hospitality businesses have altered their business model more radically than in 2020 in order to generate some income, thereby shifting from Group 4 towards Group 3), the groups remain a valid means of segmenting the COVID-19-era economy.



Figure 4. Do you feel that the board/ exec team are aware of the value and role of Business Continuity in their organization?

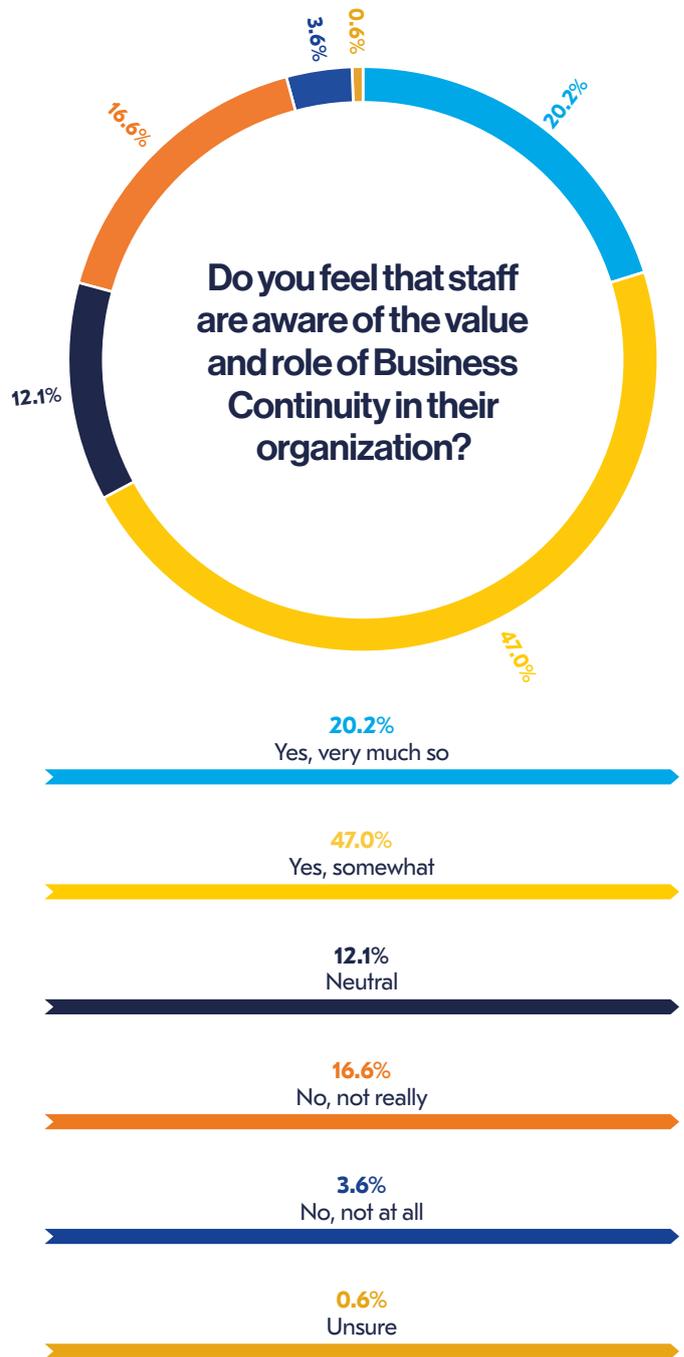


Figure 5. Do you feel that staff are aware of the value and role of Business Continuity in their organization?

New workplaces, new priorities

- Remote working remains a reality in many organizations, and no clear picture of where the balance between office-based and remote work will be struck in the post-pandemic period.
- Issues such as IT resilience and standards of health and safety in the ‘new workplace’ are also still evolving and many organizations have yet to consider the homeworker in BC planning.
- There is a shift towards greater appreciation of staff wellbeing by organizations as they seek to address the so-called ‘mental health pandemic’ that has accompanied COVID-19

The question of what the workplace will look like post-pandemic remains a popular thought experiment for office workers and senior management alike. For much of 2021, it has been difficult to open LinkedIn without seeing a connection asking their network to vote on how they would prefer to work once things are back to normal: fully remotely, fully in the office, or somewhere in between? As the year has developed, major global employers have tentatively announced policies regarding ‘the great return’. These, however, have varied significantly - even within sectors - and there is no sign of consensus on where the balance between what each party gains and loses from either resuming or not resuming office-based duties may eventually be struck. A recent survey of the UK workforce showed that 70% believed workers would never return at the same rate, with the majority preferring to work full- or part-time from home³.

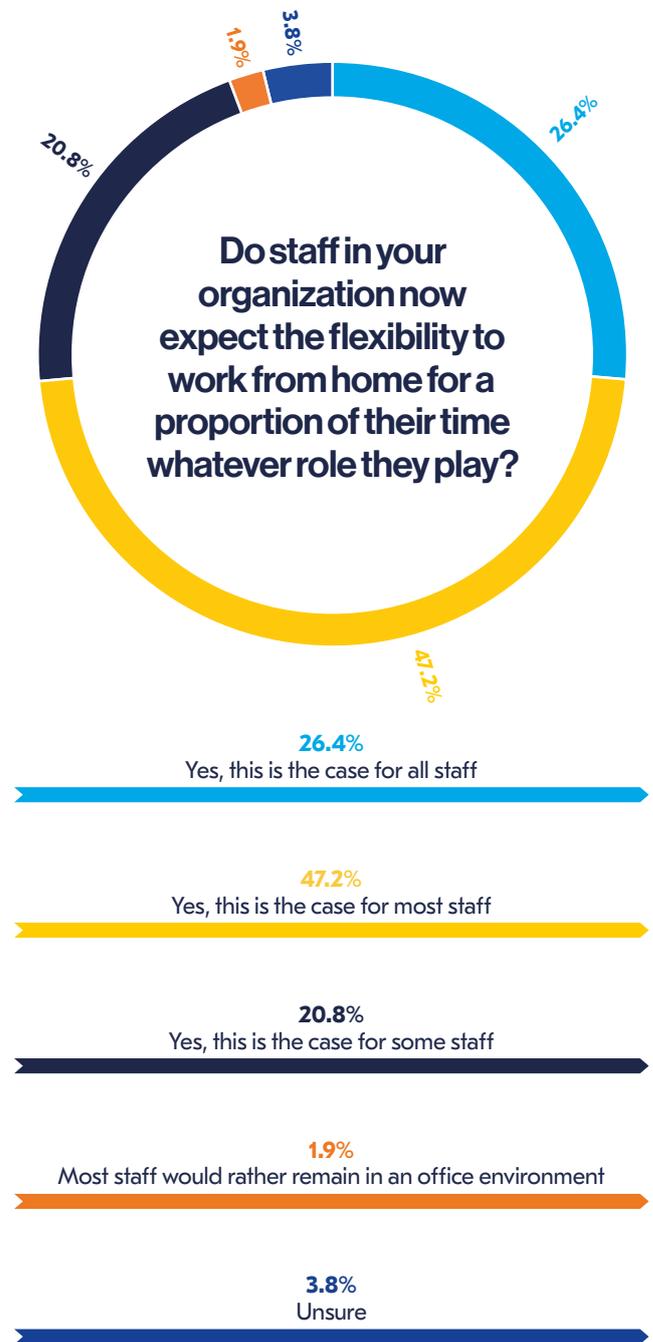


Figure 6. Do staff in your organization now expect the flexibility to work from home for a proportion of their time whatever role they play?

3. Jones, L & Wearn, R (2021). Most workers do not expect full-time office return, survey says. The BBC; 16 September 2021. Available at www.bbc.co.uk/news/business-58559179 (accessed 28 September 2021)

The survey itself also shows that it is highly likely that some form of increased homeworking will be incorporated into many organizations' operations, at least in the immediate post-pandemic phase: more than 94% of respondents said that some, most, or all of the staff in their organization now expected the flexibility to work from home for a proportion of their time, whatever their role.

Of course, sustained demand on systems over an indefinite period presents a different challenge to those responsible for IT resilience, even though many had an admirable response to the initial challenge of the shift to homeworking. Going forward, there is likely to be increased scrutiny on aspects of the 'new normal' such as the security of remote use of corporate systems, especially in the light of the increased number of cyberattacks against organizations leveraging remote working solutions, or the infrastructure that enables them, as their attack vector. Should a permanent hybrid solution emerge from the pandemic for most office-based industries, this will again change the demands made of systems, administrators and users as well as BC processes and procedures. If workers are now going to be carrying out critical activities within remote environments, are these being considered in BC plans? We are currently in a fairly dangerous position: many interviewees spoke how most workers were still working remotely, but plans had yet to be updated to incorporate remote workers, in addition to health and safety laws being potentially violated with poor homeworking environments.

Are the same standards of resilience, such as power or communications, being applied to homeworkers as they are in the office?

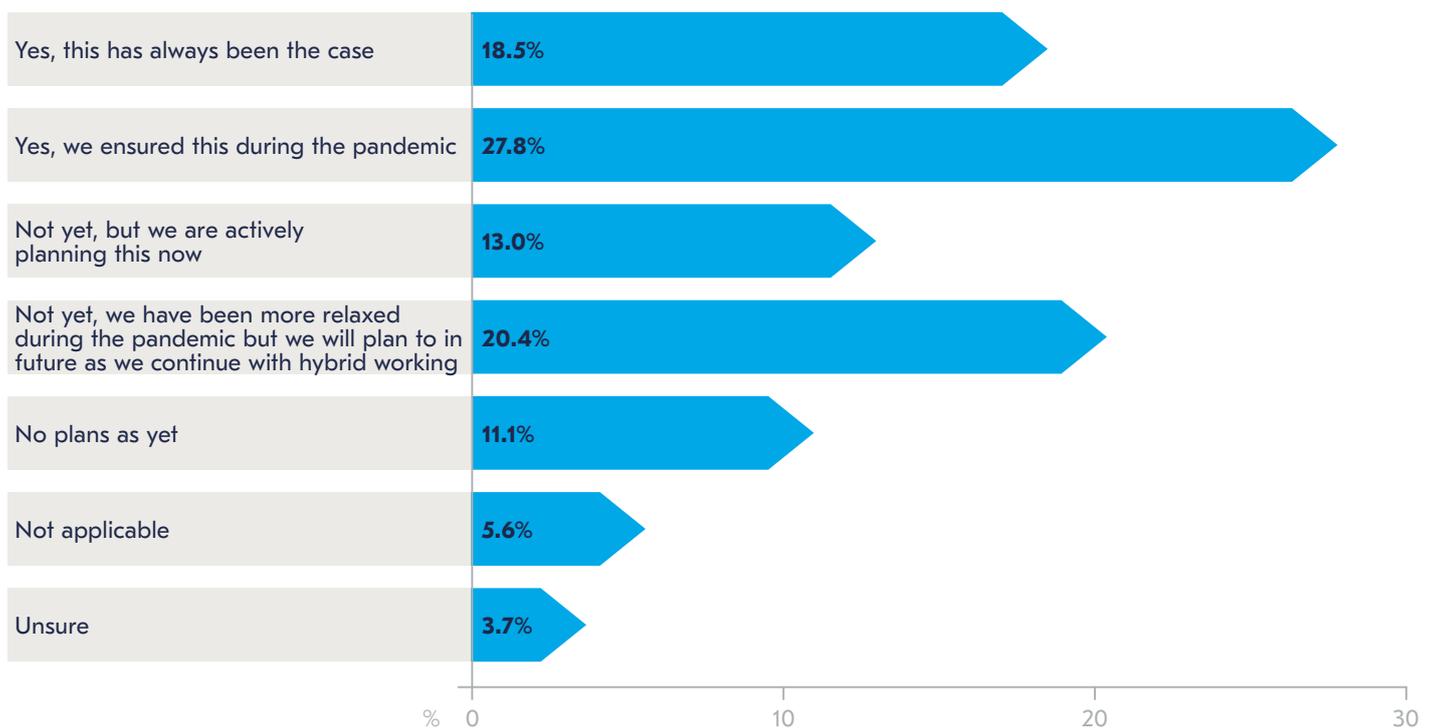


Figure 7. Are the same standards of resilience, such as power or communications, being applied to homeworkers as they are in the office?

Perhaps appropriately then, a question on this issue drew one of the more evenly spread answer patterns in the 2021 survey. When asked if the same standards of resilience were applied to homeworkers as in the office, with power and communications specifically mentioned, responses varied widely. More than a quarter of respondents (27.8%) stated that this had been ensured during the course of the pandemic with a further 18.5% saying that the same standards had always applied in their organization. This means more than half of organizations did not have the same standard of resilience applied to remote workers as they do to those working in the office. Some are making plans to rectify this, however: a fifth (20.4%) stated that their organization had been more relaxed during the acute phase of the COVID-19 crisis but would now be developing a more rigorous policy response, and 13.0% said that the standards were not yet equal, but a move in this direction was being planned. 11.1% said there were no plans for changes to be made, despite having homebased staff. A risk not only to the company, but also to suppliers and customers.

Are homeworkers required to meet the same health and safety standards and guidance as they are in the office?

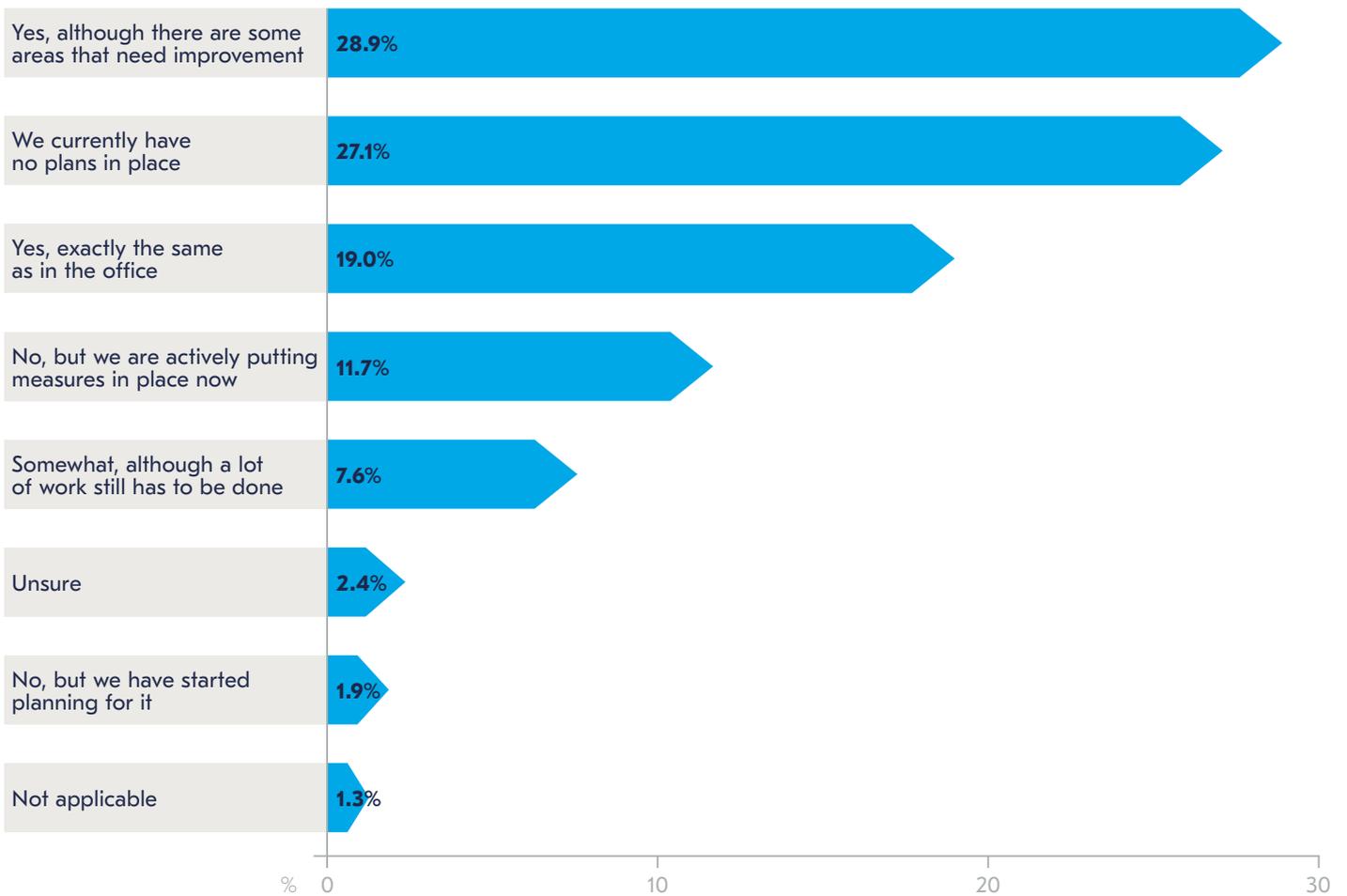


Figure 8. Are homeworkers required to meet the same health and safety standards and guidance as they are in the office?

Another question regarding health and safety produced a similar result, although responses were somewhat more polarised and had some concerning findings. 28.9% of respondents stated that the same health and safety standards were applied to homeworkers as in the office (although some areas needed improvement), while 27.1% stated that there were no plans at all to enforce similar standards. Health and Safety authorities worldwide have issued and updated guidelines for organizations who have transitioned to a greater use of homeworking as a result of the pandemic. The UK Health and Safety Executive, for example, has updated guidance during the pandemic⁴, whilst the International Labour Organization has released lengthy guidance covering guidance on multiple jurisdictions⁵. There has also been an increasing concern over the correct use of visual display equipment and the effect of homeworking on employees' mental health.

On the latter subject, a new question for 2021's survey focused on whether mental health and staff wellbeing was considered in organizations' BC plans. Multiple research studies have shown that homeworkers have exhibited episodes of troubled mental health in the last two years. Indeed, the problem has been so widespread that it has been termed 'the second pandemic' in some quarters⁶. Indeed, BCI research for the fortnightly *Coronavirus Preparedness Report*⁷ during the pandemic showed many organizations were so concerned with planning a strategy for the organization to weather the pandemic successfully, they ignored the mental health needs developing amongst their most important asset: their staff. Encouragingly, 28.2% of respondents said mental health and wellbeing had begun to form part of BC considerations during the pandemic, with a further 22% saying this has always been the case. At first, it may seem concerning that nearly a third (29.6%) of respondents stated that there were no plans to consider these issues in BC plans. However, this was not because mental health and wellbeing was not being considered by the organization as a whole, but it did not fall under the domain of business continuity to manage.

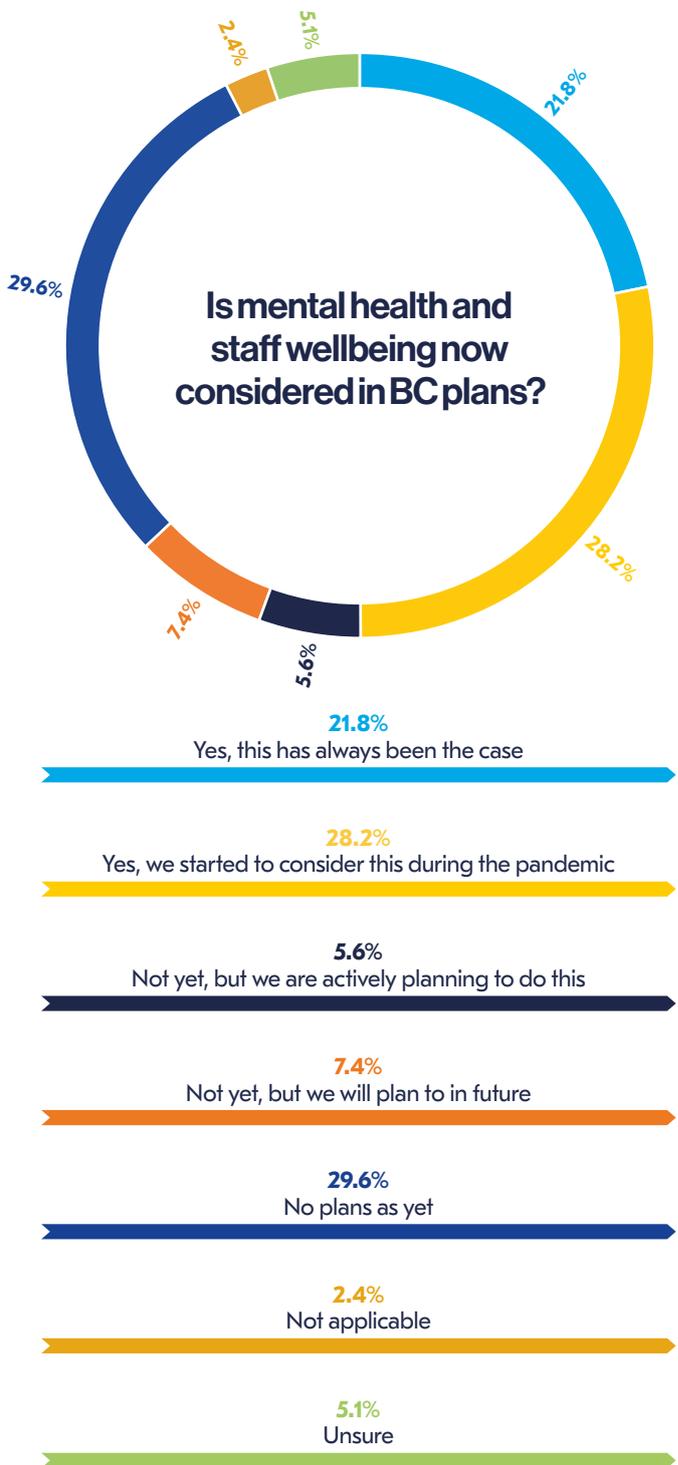


Figure 9. Is mental health and staff wellbeing now considered in BC plans?

4. Health and Safety Executive, The (2021). Protect home workers. UK Government; 2021. Available at www.hse.gov.uk/toolbox/workers/home.htm (accessed 28 September 2021)

5. International Labour Organization (2021). Teleworking during the COVID-19 pandemic and beyond – A practical guide. ILO; 2020. Available at www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---travail/documents/instructionalmaterial/wcms_751232.pdf (accessed 28 September 2021)

6. Delmastro, M & Zamariola, G (2020). Depressive symptoms in response to COVID-19 and lockdown: a cross-sectional study on the Italian population. Nature; 31 December 2020. Available at www.nature.com/articles/s41598-020-79850-6 (accessed 28 September 2021)

7. BCI, The (2020). Coronavirus Organizational Preparedness Report; Fifth Edition. The BCI, 15 May 2020. Available at: www.thebci.org/resource/bci-coronavirus-organizational-preparedness-survey.html (Accessed 16 September 2021)

The views of both employees and employers vary wildly on the future of homeworking. A regular study produced periodically throughout the pandemic by management consultancy McKinsey shows no clear picture emerging of how anyone wants the world of work to look once the pandemic is behind us, beyond a vague sense of greater flexibility. Perhaps the perfect illustration of the division among the workforce comes from a question asked by McKinsey in its *Reimagine Work* survey⁸ published in April 2021: when asked about their hopes for the future, 51% said 'better work/life balance'. On their fears regarding the return to on-site work, 45% said 'worse work/life balance'. And on their fears regarding the extension of homeworking, 46% said 'worse work/life balance'. People fear the same thing from different outcomes — so how is it even possible to make a call on how business will look in the 'next normal' and how happy the people that the business depends on will be with that outcome? The same survey suggests that a majority of people want to work at home for three days a week in the post-pandemic period, but that this is not a firm will, and could change as conditions in terms of infections and distancing measures improve.

8. Boland, B, De Smet, A, Palter, R & Sanghvi, A (2020). Reimagining the office and work life after COVID-19. McKinsey; 8 June 2020. Available at www.mckinsey.com/business-functions/organization/our-insights/reimagining-the-office-and-work-life-after-covid-19 (accessed 28 September 2021)

2020 results borne out?

The research for the 2020 survey was carried out at a key stage in terms of operational resilience in the pandemic — by mid-2020 it was evident that IT systems had proven robust in the face of the sudden shift to remote working and the use of virtual private networks (VPNs) and videoconferencing platforms had enabled modified business operations to continue. The resilience of IT systems was considered the most significant contributor to overall organizational resilience by respondents to the 2020 survey, followed by other forms of operational resilience. The sustained strong performance of systems has been central to overall organisational resilience as users and administrators have adapted to successive lockdowns and other restrictions in various jurisdictions. Narrative responses to the 2021 survey highlight the continued positive opinions of IT resilience.



Resilience at board level





The need for representation at board level is becoming more widely appreciated as a result of the disruption seen since early 2020

- Business Continuity professionals have long wanted board-level representation but have traditionally found it difficult to build the necessary relationship with the board. The pandemic has made it easier to build those bonds.
- Previous frustrations persist, albeit at a lower level – BC is still frequently parcelled within other departments (such as IT or Risk) and becomes subservient to that principal area.
- Most professionals feel individual departments should be incentivised to look after their own resilience to ensure they do not only disrupt the rest of the organization, but are able to adapt and respond for the greater good of the organization when another part fails.



Figure 10. What is your opinion of establishing a board level appointment who is responsible for promoting resilience at all levels and ensuring all resilience building efforts are aligned?

The impression of a greater appreciation of BC and resilience within organizations as a result of the pandemic is reinforced by the results from a question asked in both the 2020 and 2021 surveys: that of the potential for establishing a board-level position with responsibility for resilience at all levels in the organization. In 2021, nearly half (46.9%) of respondents answered that there was already such a role in place before COVID-19, a further 8.4% stated that this role had been created since the onset of the pandemic, and 4.8% replied that they were actively looking to create the post. In the comparable question in 2020, 31.4% said that the role existed, with a further 5.8% stating that their organization was now looking to create such a post in the light of COVID-19 showing a very positive uplift in the number of organizations creating the role in the past year. Some interviewees reported that whilst a specific role had not been created, reporting lines had been changed and a board member was now assigned to overall resilience. Others reported that 'Heads of Resilience' already existed in their organizations and, whilst not at board level, they had direct reporting lines which had helped to promote a culture of resilience within the organization.

One interviewee talked about how a direct reporting line to the board would be impossible in their very large organization, but that she had worked to ensure that the importance of BC was realised by starting discussions with regional CEOs. The same interviewee also mentioned that she reported to the 'Head of Resilience' which, in itself, is a sign that an organization takes resilience seriously.



“We don’t have representation at board level, but we’ve done a lot to get regional representation and getting a structure in place that does get heard at that level. What I’ve done is go to the Regional CEO for each of our three regions and I’ve said ‘This is an important program of work that protects our brand and reputation and business operations and our people. But if you really understand, you will support me by nominating someone that I can actually have a regular dialogue about what’s working, what’s not working, what are the risks, etc, in each of the regions.’ And all three of them have agreed to that and they’ve nominated the Chief Operations Officer for each of the regions to speak to me. So I actually have monthly conversations about my programme within each of the countries, which is quite different. Same framework, but different aspects. So that’s the regional view. But we see that there is a global gap. Globally, as you just said, do we have a seat at the board? No, we don’t. But we want to get there. So we – that’s all the regional managers and my manager, who’s the global head of resilience – are working together to put together a business case for our own manager, for our own Chief Global Safety and Security Officer to have dialogues not just the board, but one step down from the board, to elevate us and to elevate the program.”

Senior Resilience Manager, IT, Australia

Another interviewee discussed how the pandemic started shortly after some major changes in Management team structure and it was the continuity and knowledge of the BC team which enabled the organization to continue to operate – and thrive – during the pandemic. As a result of the actions of the BC team, the team has now been leading the response to all incidents since the start of the COVID-19 pandemic whereas another believed that the answer lay with pushing work “upwards” to senior management level.

“There are several incident teams that sit separately. However, my horizon scanning made me alert my risk manager to the issues brewing in Wuhan and how the organization needed to get onto it. We had a meeting on to get the right people together and we worked out what COVID would mean, what we might need to find out, and how things work. We had an early case in Australia two days later, so talk about being on the front edge of all of this. What’s happened since then is that the risk and business continuity team has actually led the response. We tailored the people [in the incident team] in a way that was helpful.”

BC Manager, Higher Education, Australia

“Some organizations realize that the overall management of risk needs to change because the risk universe has changed. But some won’t. So in those organizations, it’s a case of proving your worth within the organization by pushing stuff upwards.”

Head of Risk, Healthcare, United States

Even more stark is the drop in the numbers of respondents who believed that there was no need for such a role in their organization, from 25.1% in 2020 to just 2.7% in 2021. While these numbers do not necessarily represent the views of the same individuals or businesses year-on-year, BC and resilience professionals are clearly taking a more favourable view of a role with responsibility for resilience and influence among senior decision-makers – and their opinions are gaining support among colleagues. Comments sent with responses also suggest that the view of resilience at senior level has moved more towards ‘it’s everyone’s job’ and away from devolving the responsibility for resilience to individual business areas or to less senior personnel. Indeed, respondents who gave such comments in free text answers were more likely to be those who reported that senior management fully understood the role and importance of a resilient culture within an organization.

What methods will you consider going forward raise awareness of BC within the board?

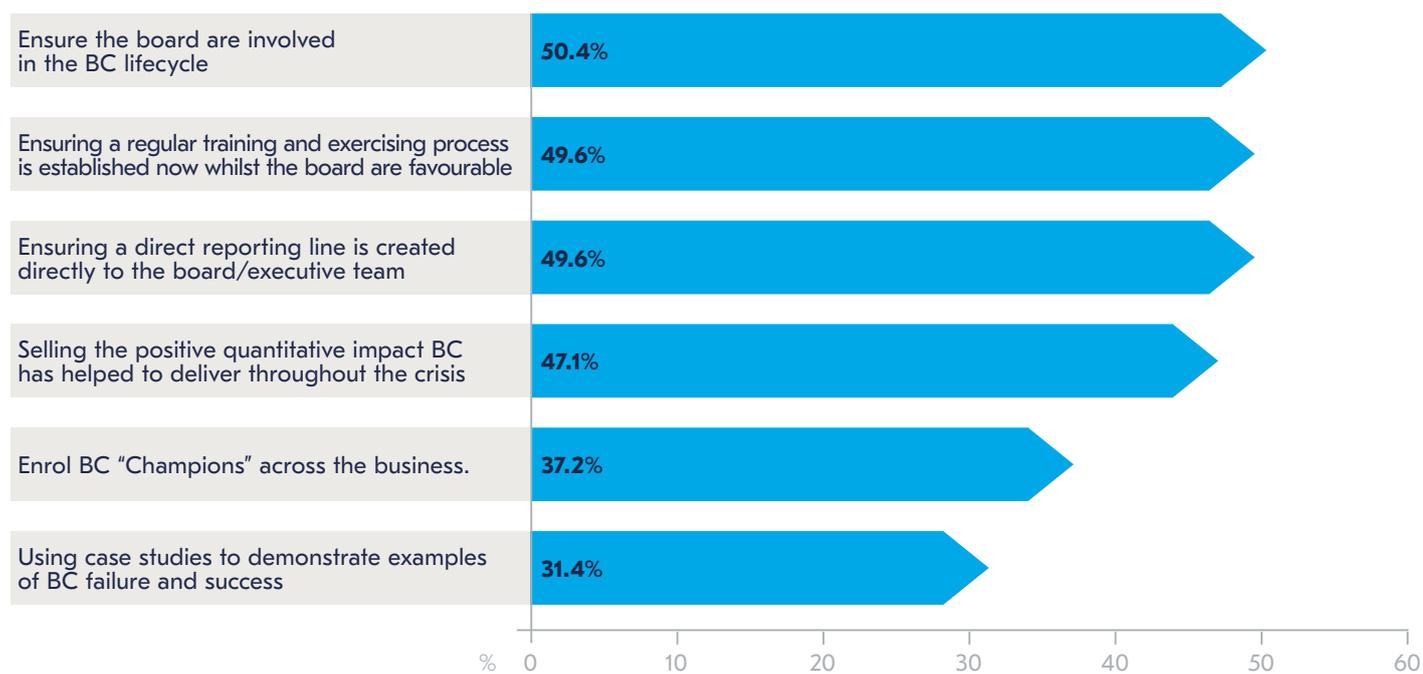


Figure 11. What methods will you consider going forward raise awareness of BC within the board?

When respondents were asked the methods they will consider going forward to raise awareness of Business Continuity and resilience with the board/senior management, three suggestions received the approval of almost half of respondents: 1) ensuring the board are involved in the BC lifecycle; 2) ensuring a regular training process is established while the board are favourable; 3) ensuring a direct reporting line to the board is created. A post-incident review could help to highlight the importance of such a reporting line being created, although if no post-incident review has been planned yet, tackling the issue now would be better than delaying: figure 14 demonstrates that capitalising on the enhanced visibility that Business Continuity has gained as a result of COVID-19 means senior management are likely to be more susceptible to creating a new reporting line at this current time. The *2021 BCI Crisis Management Report*⁹ has shown that rather than waiting for the pandemic to be 'over', they are already carrying out interim reviews (with senior management input) so measures like these can be discussed without waiting for an elongated incident to end.

One interviewee spoke about how they had rolled out BC awareness sessions for all staff within their organization as they understood the importance of every employee – not just senior management – understanding the role of BC and what role they should play if they come across an incident.

"I have initiated a series of awareness training courses within the organization because the pandemic had raised the importance of BC, as not much awareness was seen earlier. So the series of awareness sessions showcased how the business continuity plan has to be understood by the people who are the critical resources on the ground. It shouldn't be only with the leaders because at the end of the day, when an associate or an employee who is working at the operational level runs into a crisis, they need to know how and what they need to recover."

Operational Resilience Manager, Assurance, India



9. BCI, The (2021). Crisis Management Report 2021. The BCI; 1 September 2021. Available at www.thebci.org/resource/bci-crisis-management-report-2021.html (accessed 28 September 2021)

Senior management increasingly understands the importance of resilience although work still to be done at other levels

- Most boards are aware of the importance of Business Continuity and Resilience, but less than two-thirds are aware of how Business Continuity can contribute to a resilient culture.
- Problem-solving, facilitating, collaborating and making things happen are now the key qualities sought in a BC manager.
- Over half of BC professionals will seek to achieve a direct reporting line to the Board post-COVID.
- Ensuring the Board are better involved in BC planning (such as identifying critical services) means better engagement can be achieved during a major incident.

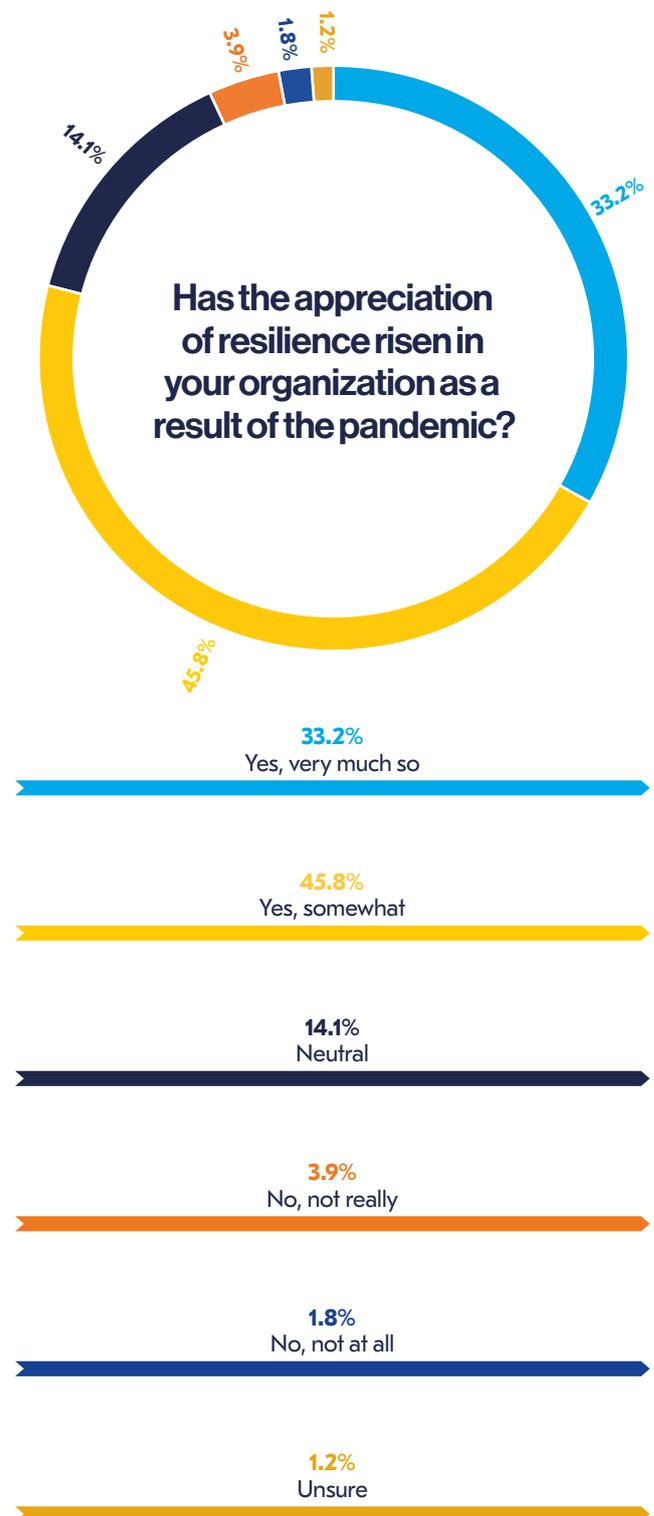


Figure 12. Has the appreciation of resilience risen in your organization as a result of the pandemic?

One could reasonably assume that 2021's view of BC becoming more strategically orientated would be reflected in a greater appreciation of BC and resilience within respondent organizations, and this is borne out by the survey results. 79.0% of respondents stated that there had been an increased appreciation of resilience within their organization as a result of the pandemic, with almost one-third of the total describing this as 'very much increased'. Only 5.7% of respondents gave a negative answer to this question. An interviewee described how there was a much greater appreciation now of the importance of being prepared for crises which are, for good reason or not, avoided in planning processes. They also spoke how the CEO of the organization had promoted to the entire staff body just how BC had made their organization more resilient. Another spoke that the pandemic, coupled with proactivity, had now given them visibility at board level.

"The good thing now with a pandemic is that management realized how much pandemic plans are important and that those plans are actually part of business continuity. And I think this recognition and all the increased awareness is there because of the pandemic. Pre-pandemic, there was a perception that we'll never actually have to use this plan; it's never going to happen. We never get earthquakes, we never get this or that. But now the world is different. And I think this means we have got a different attention now. There is more interest and awareness."

BC Manager, Pharmaceuticals, Switzerland

"Last year in March, when the pandemic started in Europe we had an all global staff meeting with the CEO where you could learn about how the organization was going to get through the pandemic. He'd answer questions like 'How are we going to do this with work?', 'Are we working from home all the time?', 'What do we do?'. At the end of that meeting, he said that the benefits of BCM really showed. So that showed me that they were really happy with what we had done to prepare it for such a comeback. So if the CEO says that, we've got a hundred thousand employees who will hear that worldwide. That's pretty much as good as good as it gets!"

BC Manager, Pharmaceuticals, Switzerland

"So, up until before COVID, business continuity was very much of the 'please, sir, would you actually do a business continuity BIA for me? Will you do a BCP? Would you mind doing a test?'. There was very little visibility. Although Business Continuity was one of the top three on the board's agenda, there was very little visibility at the board level. So when COVID happened, I wrote the pandemic plan and created pandemic statements and responded to customer questionnaires. We all of a sudden became front of house. So Business Continuity quickly became highly visible in every country and team. Everyone wanted a business continuity plan. Previously I couldn't get, for example, the vice president who was responsible for crisis management, to attend training or take the lead. Yet when COVID struck he was there. I said to him, 'do you want me to be the crisis commander?' All of a sudden Business Continuity was seen to be key to the survival and success of the company. COVID moved Business Continuity and Resilience up the value chain. Business Continuity was now talking directly to the CEO."

Resilience Specialist, Telecoms, United Kingdom

Another interviewee discussed how there had recently been a number of new board appointments within their organization and the pandemic had been the ideal showcase for the BC team to demonstrate the importance of the department in a crisis.

"In more recent times, we've had quite a turnover of our board and a number of new board members have come in. And whilst they were aware of some of the things that happen in a crisis, they hadn't been through that cycle of having a major incident and seeing the role we play. So it was comforting for them, but it was also a really good opportunity for us to position ourselves strongly."

Security and Resilience Director,
Energy, Australia

"We did a broad scale reversion to work from home in March 2020 within a two-week period and by mid-March, all 50 of our BC team were stood up, implementing their plans. It's one of those examples of it's great to share experience, but there's nothing quite the same as learned experience. We had a conducive environment that said business continuity is good and we should invest in it, but this was the first time that everybody got to see the benefit of it. And it was a very successful exercise in so far as we were able to convert from nearly 300 offices around the globe to working from home and retained very high chargeability rates."

Security and Resilience Director,
Energy, Australia

A further interviewee discussed how they saw a way of getting management interest in BC was to create a "strategic BIA" which was more focused around risk and naturally opened conversations between BC and senior management. They believed the ideal would be to have a Chief Resilience Officer role to help cultivate this type of resilience culture.

"I see the Strategic BIA as being an opportunity for a two-way conversation between us as business continuity and the board leadership. Not a traditional BIA, but more about what Leadership see are the risks to the business, and what the Business Continuity and Resilience profession see? Who's thinking about solar flares, global warming, civil unrest, terrorism, new regulations, etc. I actually think Global Warming is another reason why boards are getting more engaged in Resilience and Business Continuity. But to deliver Resilience, we need board leadership and sponsorship. I would love to see Chief Resilience Officer post created on every company's board because they are operating in an ever-changing 24/7 always on world."

Resilience Manager, Insurance, United Kingdom



Coming out of the pandemic, please rate the importance of the following attributes in a BC Manager on a scale of 1-5 (where 1 is not important and 5 is highly important)

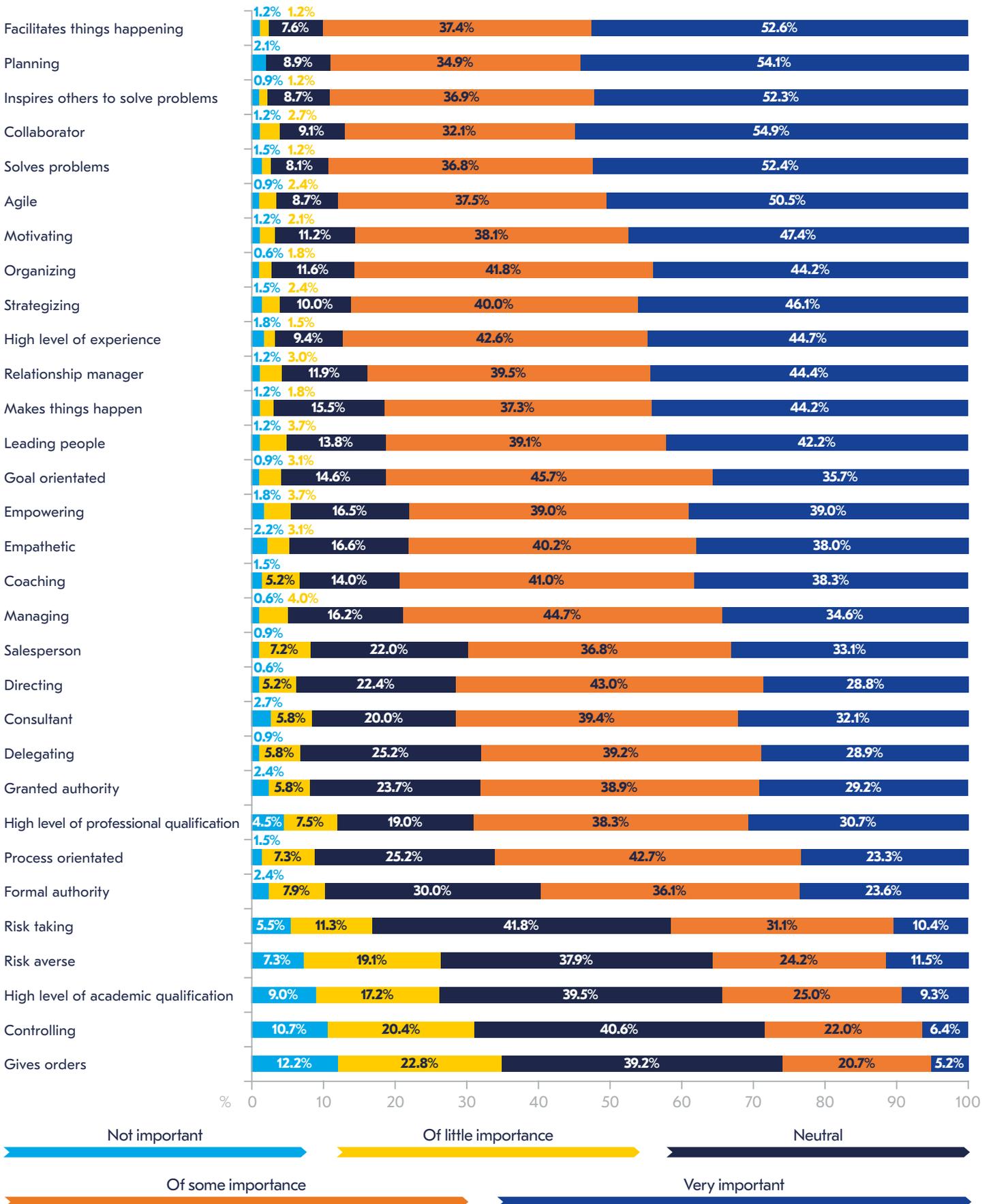


Figure 13. Coming out of the pandemic, please rate the importance of the following attributes in a BC Manager on a scale of 1-5 (where 1 is not important and 5 is highly important)

A major part to getting the required buy-in from senior management is the use of soft skills employed by BC managers. A question regarding the most important traits for a BC manager also gives an indication as to the way in which the role is moving from a role which operates in the background to keep the organization running to one which is now in the mainstream of many organizations. Whilst it can be easy to blame senior management for not appreciating the role of BC and resilience, some of it has to be down to the BC and resilience managers themselves.

We noted in last year's report that the role of the BC/Resilience Manager was changing where characteristics such as "directing", "process orientated" and "high level of academic qualification" were at the bottom of the list of characteristics, whereas words such as "inspires others to solve problems", "collaborator" and "motivating" were towards the top. This year again, respondents were asked to rank qualities in importance for a BC manager from 1-5, where 1 is not important and 5 is very important. The traits with high combined 4 and 5 ratings are, by definition, those considered most desirable in a BC manager. The top five ranked attributes in 2021 were 'facilitates things happening' (91.0% of respondents ranked as either '4' or '5'), 'solves problems' (89.2%), 'inspires others to solve problems' (89.2%), 'planning' (89.0%), and 'agile' (88.0%). 'Collaborator' was the trait considered very important by most respondents, with 54.9% giving it a 5 rating. Interestingly, planning – which was at the top of last year's survey – has fallen by over four percentage points. Whilst many would argue that this characteristic should still be at the top of the table, it is perhaps indicative of BC professionals considering the planning process as a whole where planning for the effect of an incident rather than the cause – which is now becoming commonplace – is actually reducing the extensive planning processes which were previously carried out for every scenario.

An interviewee echoed these findings and commented that it was their soft skills which had helped them to earn a job grade change in their current role.

"Emergency and continuity approaches are similar in that sense because the job isn't about just training people to do evacuations anymore. It's really about collaboration. It's about communication. It's about bringing people on the journey with you, and so some of those typical emergency response skills from security or police, for example, are just not as relevant - particularly in our context because we have such a diverse group of people."

BC Manager, Higher Education, Australia

The same interviewee also commented that within their organization, some "old style" managers could see how empathetic behaviours resulted in better results from teams, so had changed his behaviour to suit this – even though it was not a natural working method for him.

"Different teams have been working together much more since the pandemic started and there's a realization that it takes all the components of university. There is an emerging recognition that collaboration, empathy and communication are valuable in responding to incidents and disruption and that local teams value regular briefings."

BC Manager, Higher Education, Australia

Another interviewee agreed with the importance of a good BC or Resilience Manager having to be an effective salesperson in order to get buy-in from senior management, whereas another spoke of their proactivity of getting different teams communicating with each other more effectively during the pandemic. This has now been embedded into normal practice within the organization and had been used to effectively manage other incidents in the organization post-COVID.

"You can't complain about not having a seat at the table if you've not fought for a seat at the table. That may sound aggressive, but if we're not selling what we're doing and we're not explaining why it's important then we're not going to get that seat."

Global Business Continuity Manager,
Leisure & Hospitality, United Kingdom

"Getting senior management focus for an extended period has been historically quite difficult. So I put a proposal to the group executive that comprises the crisis team that for this event, we set up a special purpose working group that would have the same authority as the exec-lead crisis team, and include representatives from the various business divisions and corporate functions - HR, HSE, IT, facilities etc. We got the buy-in so that was really fantastic. We got the global leads of each of those departments in at the table with us, and that was really helpful from a collaboration perspective. In more recent times we've been focusing on ransomware as a big issue for the business, and the enhanced relationships that we built with IT through the COVID process has really helped us move that along a lot quicker than it might otherwise have done."

Security and Resilience Director,
Energy, Australia

Another interviewee described the importance of having to adapt your personality type to effectively get an appreciation of the importance of resilience from senior management.

"In my opinion, you have to be able to sell the message. If you can sell the message and you can get buy-in for the message, then a lot of other stuff flows naturally out of that. I've rated all the attributes of the survey high because I believe you have to be a Jack of All Trades in what you do. Because of this, you have to mold your personality accordingly. The higher up the chain you go, the more egos there are to deal with and it needs managing sensitively."

Senior Risk Officer, Emergency Services, Australia

Many professionals still struggle however, particularly in cultures where BC has been a tick box exercise in the past and there is still an underappreciation of the role the department makes into overall organizational resilience. For professionals who are in this situation, the importance of good communication and freeflowing information channels is highlighted as crucial.

"I've been trying to change things for two years now. I think my own manager, sees what I do as more of a tick box exercise than implementing preparedness. I try to make the sessions I have with people interactive and interesting. The message is slowly getting out there, but it would be much easier if we had that top-down support."

Senior Manager, Resilience, Australia

Meanwhile, the attributes with the lowest importance ranking in the survey were once again 'gives orders', 'controlling', 'high level of academic qualification', 'risk averse', and 'risk taking'. Once more, the contrast between the qualities favoured by respondents and those considered less vital clearly supports the idea that BC is becoming more involved in strategic decision making and better integrated within organizations more widely. The top five qualities listed above would be similar to those seen for managers or senior personnel in general, while the bottom five contain some attributes that could be seen as tactical or specifically related to the job role. The survey suggests that BC personnel do not consider themselves to be an exotic addition to their organization, separated by the nature of their role. They view their role as an intrinsic part of their organization's composition. However, until management fully appreciate the role and importance of BC within an organization, full organizational appreciation is still unlikely to happen for that organization in the near term.

Business continuity and resilience professionals are hopeful of more resource post-pandemic

- The pandemic has kept Business Continuity front and centre, and most professionals remain confident of acquiring additional resource or financial support post-pandemic.
- Only 8% of BC professionals felt that greater executive support for BC was unlikely at this time.

The 2021 survey shows that BC professionals have maintained – and perhaps even increased – their optimism from 2020 regarding the potential for greater board or executive support for BC or organizational resilience in future. 37.3% of respondents to this year's survey believed that they could achieve both more budget and more resources, while a similar number thought that this would possibly be the case, but could not predict how much. A further 6.1% felt they could benefit from a financial viewpoint only, and 4.3% from a resource level. Only 8.2% believed they were unlikely to be able to win support for greater spending or headcount.

Additional resource is only likely because of the greater appreciation for BC that is highlighted elsewhere in this report. Business cases for extra resource for BC and resilience may include the ability to advocate for the importance of good BC practice within the organization as a whole, or the hardening or replacement of weak areas of network or other infrastructure. More than anything, it is likely that BC practitioners will be better able to highlight and explain what they perceive as the deficiencies within their organization's BC offering. Almost every organization has had some form of major BC challenge during the pandemic, and few have been able to ignore it or show a lack of interest. Simply put, BC now matters more to more people, either because they have seen it work, or because they have seen it not work.



Figure 14. Do you believe you will be able to get greater board/exec team support for BC/ operational resilience post-pandemic?

Collaborating for resilience



COVID-19 to drive better organizational collaboration

- COVID-19 continues to drive better inter-departmental collaboration as well as more effective industry collaboration.
- Nevertheless, responses to the 2021 survey are slightly less optimistic in this area than were seen in 2020, suggesting that some hopes for better collaboration have yet come into fruition.

How do you believe organizational collaboration will change for the positive post-pandemic?

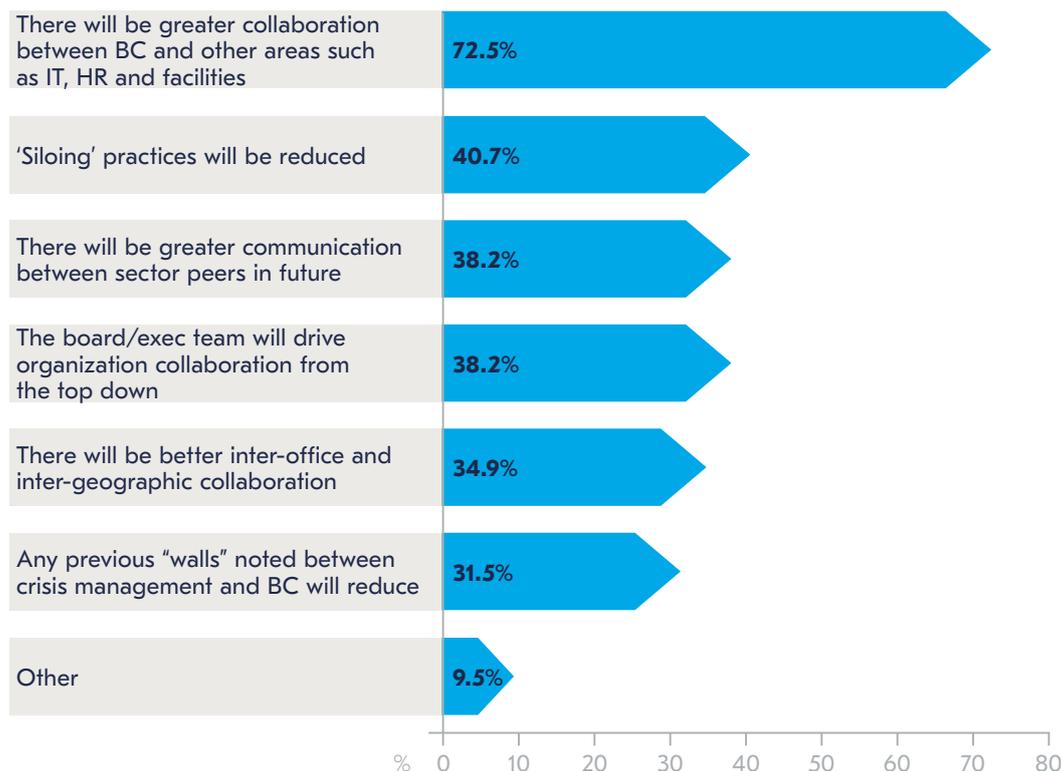


Figure 15. How do you believe organizational collaboration will change for the positive post-pandemic?



A key theme of both questions and answers in the 2021 survey is the potential for lasting change to come about within BC both within organizations and within industries as a result of the pandemic. Organizational collaboration is one area where there is particular hope that sustainable improvements may result from the rapid transformations that so many areas of our working lives have experienced.

The survey asked respondents how they believed organizational collaboration would change for the positive post-pandemic – a question that was also posed, with minor differences in wording, in 2020. This year's survey sees 72.5% of respondents believing there will be greater collaboration between BC and areas such as facilities, HR and IT. While this clearly indicates optimism among BC professionals, there is a note of caution – the comparable figure from 2020 was 78.3%, which suggests that some hope regarding lasting impact has faded as the disruption resulting from the pandemic has moved from acute to chronic.

Indeed, this pattern is mirrored in the other responses – all those that were offered as options in both years saw slightly lower ratings in 2021, albeit within the context of continued overall optimism. So while 38.2% of respondents feel that there will be greater communication with sector peers in future, the comparable figure for 2020 was 44.8%. Similarly, 31.5% of respondents in 2021 believed that walls between BC and crisis management would come down as a result of the pandemic, and while this, in itself, is to be welcomed, the corresponding figure for 2020 was 39.9%. Better inter-office and inter-geographic collaboration was forecast by 48.8% of respondents in 2020 – in 2021 this was 34.5%. Two new options saw 40.7% of respondents predict a reduction in 'silos' practices, and 38.2% believe that the board would drive organizational collaboration from the top.

An interviewee told how collaboration had dramatically improved within their organization as a result of the increased communication that was happening between departments during the pandemic.

“What we are now doing as a result of COVID is we have started talking, people know who we are, we know who are the others are. So we now have what we call a core team comprising HR, workplace, health and safety, internal coms, public relations, employee relations, and us, the resilience team. So as the resilience team, we head those meetings and we also have regular team meetings to talk about anything for example pending threats, government regulations, basically anything that could affect the smooth operation of the business and also the safety of employees.. We talk about anything, anything that would impact the smooth operation of our business and also the safety of our employees. Safety comes first and then the business operations. It's now all about collaboration. We do collaborate a lot more than I have ever collaborated in any of my previous organizations.”

Senior Resilience Manager, IT, Australia

Again, the fact that the two surveys had different respondents (with a larger sample size in 2021) limits the inferences that can be drawn from these decreases. Nevertheless, lower ratings in respect of all the responses does not necessarily infer retrograde progress: interviewees told how departments have already become more collaborative in 2021 and this year's survey is merely starting from a higher base. Indeed, one would expect some ratings to have increased given that numerous industries – from banking to hospitality – have formed working groups during the pandemic to address the challenges to BC that the disruption has caused. They have also given widely held positive views of the impact of homeworking on collaboration culture within organizations.

“Crisis management and business continuity finally had a practical experience with a pandemic and this will help us for the next crisis. We had more inter-office and inter-geographical collaboration as it was a crisis that hit the whole world. So we were all sitting in the same boat, exchanging best practices, sharing information and so on. This increased collaboration will really help us in future.”

BC Manager, Pharmaceuticals, Switzerland

Business continuity and resilience – is regulation the way forward?

- More than three-quarters of respondents believed that some kind of regulation would be valuable for Business Continuity – a jump from around two-thirds in 2020.
- 1 in 10 answered in the negative with many adding their view that BC is a competitive advantage and organizations should be able to decide the level of investment required.
- Significant areas of doubt as to how BC regulation would function in practice remain, despite regulation being widespread in regions including Latin America and the Middle East.



41.9%
Yes, making BC the legal responsibility of everyone in the organization is a good idea

35.2%
Yes, but only for the provision of products and services that are deemed by governments to be critical to the on-going health and wellbeing of citizens

11.0%
No

7.3%
Unsure

4.6%
Other

Figure 16. With respect to regulation, do you think Business Continuity should be regulated across all sectors?



As you answered that BC should not be regulated or were unsure if it should be regulated, why is this?

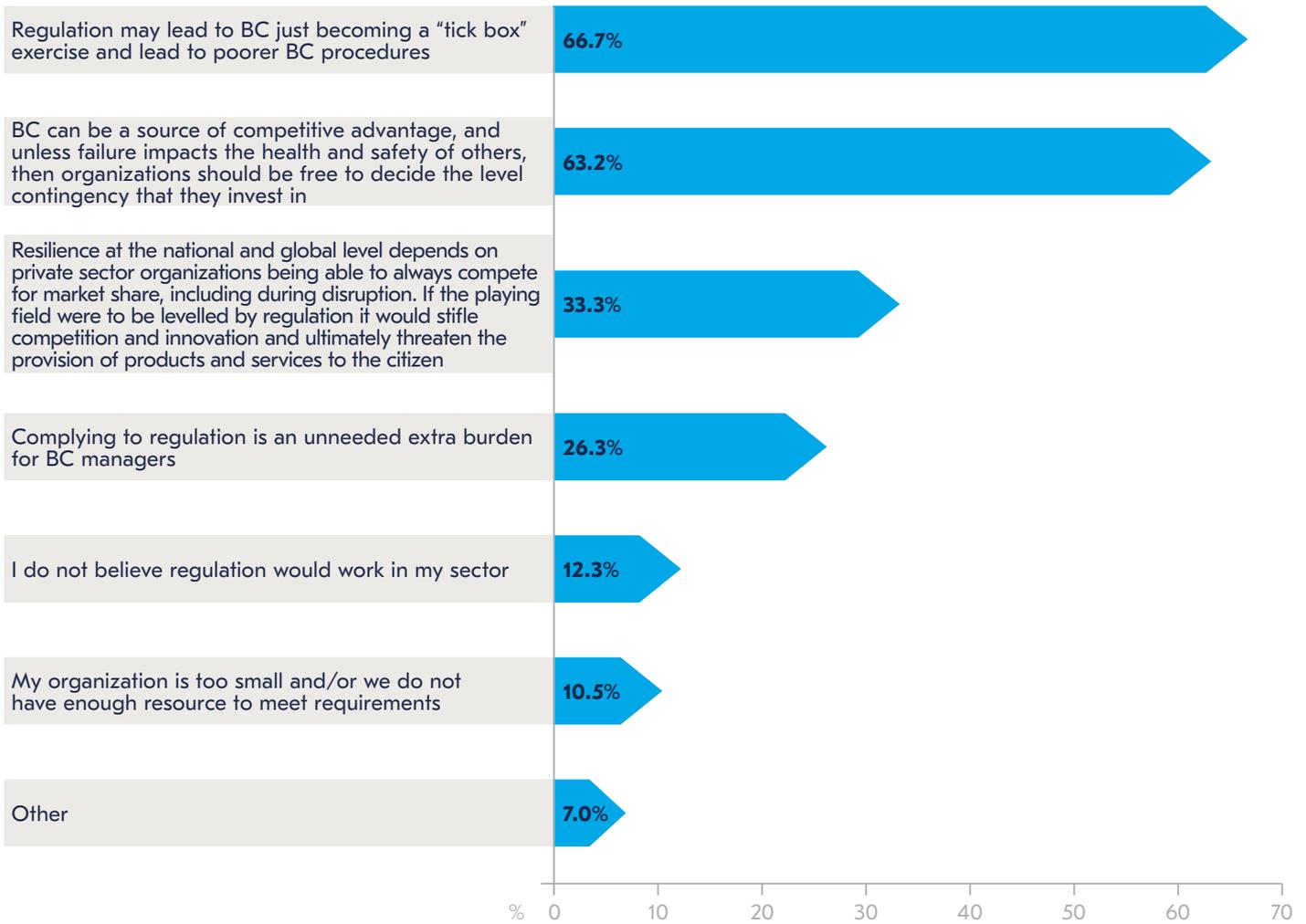


Figure 17. As you answered that BC should not be regulated or were unsure if it should be regulated, why is this?

The importance of keeping business going during times of particular challenge has made the question of the regulation of BC a particularly pertinent one in 2021. Maintaining activity during the pandemic has been vital, not just for organizations and their bottom lines, but for public services, for workers' wellbeing and financial security, for communities and for the national and global economies. Predictably, views in the survey were mixed on whether regulation was a suitable tool to use in order to ensure activity can continue. However, there was a notable increase in those favouring regulation of some form, relative to the 2020 survey.

For most organizations, staff health and wellbeing was now a major consideration, but frequently this did not fall under the direct remit of BC and was normally run by HR. However, such considerations do need to be accounted for for planning purposes and again, this emphasises the importance of communications between BC and other departments which, in this case, is HR.

"We now have a whole team of people for health and wellbeing. We look after the health and safety and wellbeing of employees as our main priority. There's so much work that is being done in this company, more than I have ever heard of anybody else doing. We've got mindfulness, we've got yoga, and various other activities for staff to be involved in. Every week we have at least three programmes that are given to all the employees to actually improve mental health. Once a month, we have a wellbeing day off. So all those kinds of things actively promote our staff's mental health, but it's not necessarily aligned to business continuity."

Senior Resilience Manager, IT, Australia

The three-quarters of 2021 respondents who believed that regulation would be a benefit were split roughly evenly between those who thought that BC being a legal responsibility for everyone in the organization would be a good thing (41.9%), and those who thought that regulation should be limited to products and services deemed essential by governments (35.2%). This reflects the prominent distinction between 'essential/key work' and everyday work that has emerged during the pandemic and has been important in maintaining key services while lockdowns have been in place, as well as guiding wider policies on free movement.

"Unless it is life or death services, no. Of course the financial sector does have a duty of care beyond the backer down the road."

Survey Respondent (Anonymous)

Narrative responses to this question highlight predictable and potentially valid difficulties with the regulation approach: costs would be prohibitive for small- and medium-sized businesses, and the regulatory demands would need to vary significantly by sector if there were not to be potentially counter-productive impacts on business. A mixed opinion on regulation highlighted the increasingly widespread practice of clients demanding that vendors meet their own standards in resilience (as in other areas), and suggested that regulation in the sector might benefit businesses.

"While not all businesses need regulation or even BC, clients dictate their expectations for resilience at time of new implementation or contract renewal in many sectors."

Survey Respondent (Anonymous)

An interviewee believed regulation would be the way forward for the industry as it would help to raise its profile, provide stakeholder and shareholder assurance and also be a selling point for organizations. Another felt that regulation should be a legal requirement as businesses are now so interconnected there needs to be a legal incentive to ensure they meet their resilience promises.

"I think it's about establishing the profile of the industry. Investors and other stakeholders want resilient organizations; they want to spend their money with resilient organizations. And I think if you regulate the industry more and you're providing firm establishment to qualifications, training, how the industry works – the business continuity part – then people know what they've bought into and they can have confidence. And I think that's a selling point also within corporates as well. You would hope that it would be an enlightened time for regulation at this point in time."

Head of Risk, Healthcare, United States

"I believe resilience should be regulated at some level because we're in a connected, 24/7 always on, world today. No business stands on its own. So if you look at the value chains of many companies, they have hundreds of other suppliers of which a percentage of them will be core to their success. I therefore think that organizations should actually have a legal requirement to provide a minimum level of resilience to make sure they can deliver what they promise and protect employment. Small or micro-businesses will need assistance in achieving these requirements."

Resilience Manager, Insurance,
United Kingdom

In 2020, 31.5% of respondents believed that regulation was not appropriate, largely on grounds of competitive advantage or the benefits of competition to the global economy as a whole. This fell to just 11.0% in 2021 when those who gave a negative or uncertain response to the question on the desirability of regulation. Of that 11%, two-thirds raised very valid concerns that they feared regulation would make BC a 'tick-box exercise' and reduce the quality and effectiveness of BC procedures overall.

"Culture is at the centre of resilience and this means you need to bring people along and engage them in the purpose and benefits of resilience. I do not believe that regulation will support this or make this easier."

Survey Respondent (Anonymous)

"Resilience is already regulated in some sector such as finance and insurance and, for those sectors, it makes perfect sense. The best way to get systematic approaches is to create that regulation. What I think is the challenge there when you go to other organizations, take retail as an example, that isn't a heavily regulated industry. If you have a regulation, it will make people just turn up and do the work to ensure compliance. That, to me, is failing to really understand why it's important to do our job. We can't be seen as the team that have to be used just because we're going to fail a regulation; it makes us into a tick box exercise a kick box. I feel it is my duty that when I come into an organization, I help them understand the concept of resilience. And by the time I leave an organization, they are better prepared, they understand the concept, I've educated them and up-skilled them to the point that they don't necessarily need someone in resilience. They don't need that centrally-driven function. However, if they're not buying into the concept because they're just doing it because someone's telling them to do it through regulated perspective, I don't think that would help drive the discipline forward."

Global Business Continuity Manager,
Leisure & Hospitality, United Kingdom

Almost as many (63.2%) stressed that BC could be a source of competitive advantage and believed that potential losses from not supporting BC were a motivating factor for investment decisions. One-third believed that private-sector resilience was a driver of the global economy and by introducing regulation, smaller organizations would find their ability to be innovative and competitive stifled. Interestingly, responses suggesting that regulation would be burdensome, ineffective in their sector or inappropriate for organizations of their size were significantly less common and failed to reach a combined 50%.

Planning and process





COVID-19 is proving a catalyst for change in the planning process

- Many professionals found their pandemic plans were not fit for purpose during COVID-19 with those following 'impact-based' plans reporting a high degree of success.
- Professionals believe some scenarios are beyond the remit of BC.
- Having a lengthy plan for every different type of incident was deemed too time consuming to be effective.
- Some believed that BC plans were operational and did not need to cover the actual hazard (e.g. pandemic) in detail, but shorter, more adaptable plans were more effective.



Now we are emerging from the pandemic, how do you think the BC planning process should change?

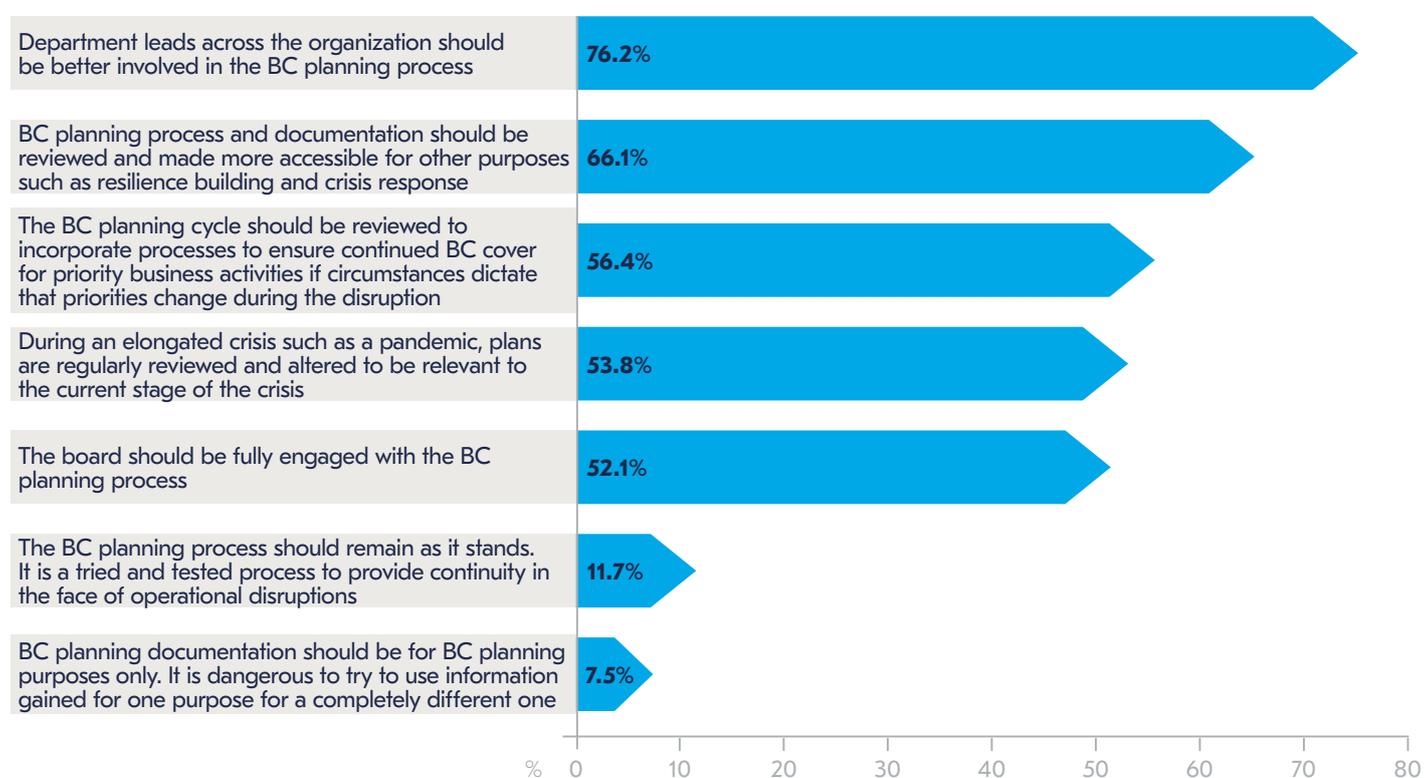


Figure 18. Now we are emerging from the pandemic, how do you think the BC planning process should change?

Respondents were asked how the BC process could potentially change going forward and were given six choices, plus an 'other' option, and encouraged to tick all that applied. On average, each ticked 3.3 options, showing that strongly held opinions persist on how BC planning should evolve. The most popular answer, with more than three-quarters of respondents ticking, was that department leads throughout the organization should be better involved in the BC planning process. This was encouraging to see as it very much adheres to good practice in organizational resilience: having all departments involved can lead to information being shared effectively, lack of duplication of work, good transparency of information, enhanced information flows, the building of trust and, ultimately, not allow siloes to build up. Better collaboration between departments can also lead to a louder 'voice' for a resilient organization and is therefore likely to lead to the secondary effect of more support from board/senior management level. Greater board engagement with the BC process was itself one of the options in this question but only received 52.1% of respondents' votes. This is likely to be because many professionals already do have a strong relationship and feel there is no need for any change to be made to current processes.

"It must not be a standalone function but a part of the daily operations of the business with shared accountability and responsibility across all positions. [BC and resilience] is, and must continue to be, an integral part of all aspects of the business from recruitment to systems to strategic planning, everything."

Survey Respondent (Anonymous)

An interviewee, meanwhile, discussed how management had instilled a culture of delegating decision making to lower tiers of management which had helped to build trust in the organization and meant decisions could be made quicker.

"Organizations need to respect that business continuity plans are fine, but they need to be very agile and adaptable. You need to have trusted people with devolved responsibility to be able to say that the organization will not be doing an action even though the plan says we should. You need to ensure that not everything has to go up to board or executive level to make decisions. The executives need to have a level of trust in levels beneath them to make decisions because they are going to be needed to be made quickly."

"We, as an organization, need to have enough devolved decision-making to say, we can do this, it's not deferred to a meeting next week, or it doesn't need to go up to your executive leadership team to decide. It's that agile, innovative type approach for a thriving business that you can see referenced as best in class across any number of sort of metrics and in any number of fields as well."

Head of Risk, Healthcare, United States

Another interviewee commented how they had struggled to get senior management buy-in within their organization as people saw their role as a head of department as important to their esteem within the organization - which meant there was a reluctance to share the information. The resiliency manager had to work hard within individual departments in order to create siloes from forming.

"I work with a lot of chiefs, and because of siloing there's a lot of vested interests – which also means lots of politics. I think people would fear for their role and their esteem in the company if they were told to reduce siloes. These siloes, or Resiliency practices, such as Risk, Incident/Crisis Management and Planning are led in a not altogether cohesive practice. An assessment of whether we align with ISO22301 has flagged that we are working outside of that framework and I hope that this assessment will help show that there needs to be a bridge between the siloes"

Business Resiliency Manager,
Technology, Spain

Almost two-thirds of respondents believed that the BC planning process and documentation should be reviewed and made more accessible for other purposes (including crisis response). This was a factor very much echoed in the interviews conducted with professionals for this report. Many reported that whilst the documentation had been produced, it was frequently not shared for other purposes or with the staff population. Although some respondents admitted their organizations had made documentation available, it was frequently difficult to locate, its existence not promoted and there was little willingness by staff outside BC to read such documentation. This is clearly something which is due for change: only 7.5% took the opposing view that BC planning documentation should be for BC planning purposes only.

Two other responses scored in excess of 50%, both relating to the importance of agility and adaptability within the planning process: 53.8% believed that plans should be reviewed throughout an elongated crisis such as a pandemic to ensure they are relevant to the current stage of the crisis. Interviewees discussed that this was something which their organization had developed during the course of the pandemic: waiting until the 'end' of a crisis and installing learnings from a post-incident review after the crisis is over will be too late – and could ultimately result in the collapse of any organization. Ensuring plans – and the people following them – are able to adapt to the current stage of a crisis means they will be more appropriate and consumed better by those using them. As long as the plans keep within an agreed framework, long-term agility of planning has been used with great success over the course of the pandemic. An interviewee admitted their organization had moved away from a traditional model to an organizational resilience-based model five years ago because of the need to be agile and adaptive.

“When you've worked in an environment where people are agile and adaptive to very quickly to changing situations you realize that there's a lot more to actually managing a business continuity event. All these binders that we used to have, all those plans, those documents; in my mind, some of those were essential, but it's not realistic to be reliant on those. So having that very structured approach actually doesn't answer the issues when it comes down to it. Because of this, we moved to that organizational resilience model within legacy PRA five years ago. And I was moving there probably about 2014 as a person. But the organization took a while to accept some of what I was saying.”

Head of Risk, Healthcare, United States

“Getting through something like the pandemic is where resilience is the right kind of mindset. It's actually isn't so much about historic business continuity which is something happened, we stop, we recover, we build back. Resilience is that continually evolving, continually adapting, continually reacting to the environment and that, to me, is really what we need to get to in order to effectively manage crises like a pandemic.”

Global Business Continuity Manager, Leisure & Hospitality, United Kingdom

“We'd noticed that plans that are 60 pages long are too long. We are changing our templates to reduced the page sizes by half, but I wonder whether this is still too much information to be useful at the time of an incident. To which audience, for what use and over which timeframes are we creating the Plans? What is there intended purpose and are we achieving this in pages of information that 'might' be needed at the time of an incident”

Business Resiliency Manager, Technology, Spain

“The problem is that once you've published your PDF plan, whether in electronic format or whether you've printed it, it's out of date. Published documents do not reflect changes in people, resources or technology in the last couple of weeks or months. I've been exploring, and I'd like to explore further, use of technology for live integration with databases for information that will be needed during an incident, compared to checklists of actions to take at the time of an incident in the short, medium and long term. There needs to be a differentiation between immediate actions and longer term goals - with the resources to needed to achieve those goals. Resources needs to be live data, not a snapshot of when the last document review was performed.”

Business Resiliency Manager, Technology, Spain

The second answer, which also points to a similar process, is the 56.4% who believe the planning cycle should be reviewed to incorporate processes to ensure continued BC cover for priority business activities if circumstances mean that those priority activities change during an incident. The message from this is twofold and again highlights the importance of involving management throughout an elongated event. Firstly, Management need to be involved in the BIA process from the start to ensure there is no conflict between BC's perceived priority activities and Management's perceived priority activities. Although this is established as best practice by the BCI's *Good Practice Guidelines*, it is still something which is not universally adopted across all organizations. Secondly, Management are likely to have a view of potential strategic decisions ahead which could affect priority business activities. By ensuring BC is aware of any potential changes which may affect priority business activities, appropriate measures can be planned in advance.

Interviewees discussed how their organizations had taken a broader approach to planning, reduced the length of plans and were moving to an all-hazards approach to planning; effectively treating the effect of a crisis rather than the cause. Others, however, battled with the fact that the incumbent management still felt lengthy plans were 'what business continuity does', despite them not actually using them in a crisis situation.

"We should take more of an all-hazards, generic approach to planning. We too often fall back on the old chestnuts of people, product and process. In other words, there's a building fire, what are we going to do? Well, a bit like an airplane into a building, you suddenly to have to turn your business around on a dime. The 300 people that come to the central office are now working in 300 separate workplaces. If you don't conceive ahead of time – and perhaps we shouldn't be trying to focus on the answer – but we should be taking a much broader perspective. It's a very challenging world. There's considerably more events that could impact us and I just think in some of our planning, we need to take a much broader perspective on what is possible."

Security and Resilience Director, Energy, Australia

"The focus is all on the plan. And I think often we develop these plans but never envisage we may actually use them. The focus is often on the 50, 60, 70-page document that no one can use or the push is for a 'plan on a page' approach, and again, no one knows what will go into it. Recently there has been discussion around metrics for business continuity and levels of preparedness on a scale. Could this approach change mindsets?"

Senior Manager, Resilience, Australia

Just 11.7% of respondents believed the tried-and-tested BC planning process should remain as it stands showing there is clear appetite for changes to be made to standard practice. Some did, however, make the point that current BC planning processes were 'good' – but without the full engagement of senior management they could never be 'great'.

"I don't believe plans should be altered during a crisis. That (in most cases) is a temporary situation and if plans are created following an "all hazards" model, they should be viable for any crisis, no matter how long it lasts. Good plans will always be relevant in any event. Boards and Management just need to make resilience more important to the business."

Survey Respondent (Anonymous)

Some of the narrative responses succinctly suggested difficulties that organizations had experienced in ensuring BC planning accurately reflected the situation during the pandemic. Supply chain was a popular point of discussion, with many respondents and interviewees making points about the subject.

"Supplier failure should be assumed as default."

Survey Respondent (Anonymous)



“New Resilience regulations and senior management state that we need ‘exit plans from our suppliers’, but really they don’t need exit plans from their suppliers. What they really require are plans on how to extract their organizations from a supplier.’ Suppliers will never willingly help them to create an exit plan and these are points are often forgotten about in planning and contracts.”

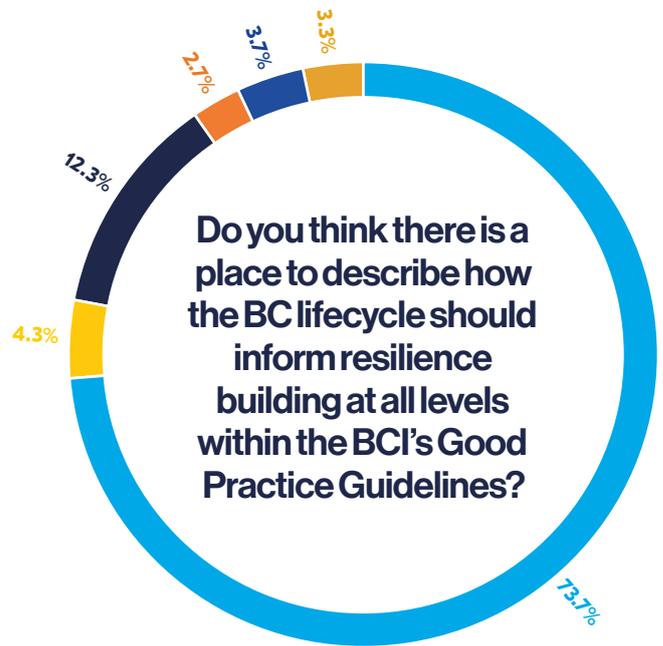
Resilience Manager, Insurance, United Kingdom

Embedding resilience into the BC lifecycle is a topic which many professionals are increasingly being asked to do within their roles. Therefore, it is not surprising that when asked whether there is a place to describe how the BC lifecycle should inform resilience building at all levels within the BCI’s *Good Practice Guidelines*, more than three-quarters of respondents agreed. Almost all of these (73.7% of the total) believed that the BC lifecycle’s role in generating information, knowledge, and resilience-building opportunities should be made explicit. While some respondents felt that this blurred the already uncertain lines between BC and resilience, one was particularly keen.

“This was incorporated into the BCP program prior to the pandemic and served us extremely well.”

Survey Respondent (Anonymous)

Others may argue that ‘resilience building’ falls under the remit of senior management and it needs to be in a separate document to the existing GPG in order to engage with the appropriate audience. However, given the responses of how the ‘new’ BC manager needs to be someone who can sell the benefits of a good BC programme to senior management, it is clearly something which needs to be considered by both parties.



73.7%
Yes, the BC lifecycle generates information, knowledge and resilience building opportunities for all levels of resilience in an organization and therefore its role in this purpose should be made explicit

4.3%
Yes, but this should be limited to areas such as IT and Procurement to which BC has an enabling dependency

12.3%
No, but I believe business continuity should work closer with resilience builders at all levels in the organization to ensure business continuity requirements are not hampered by poor resilience

2.7%
No, the primary role of BC is to put plans and capability in place based on the vulnerabilities, threats and hazards that are presented to them

3.7%
Unsure

3.3%
Other

Figure 19. Do you think there is a place to describe how the BC lifecycle should inform resilience building at all levels within the BCI’s Good Practice Guidelines?

Looking back to look forward – the importance of post-incident reviews

How are you planning to conduct/did you conduct a post-incident review (PIR) for the pandemic?

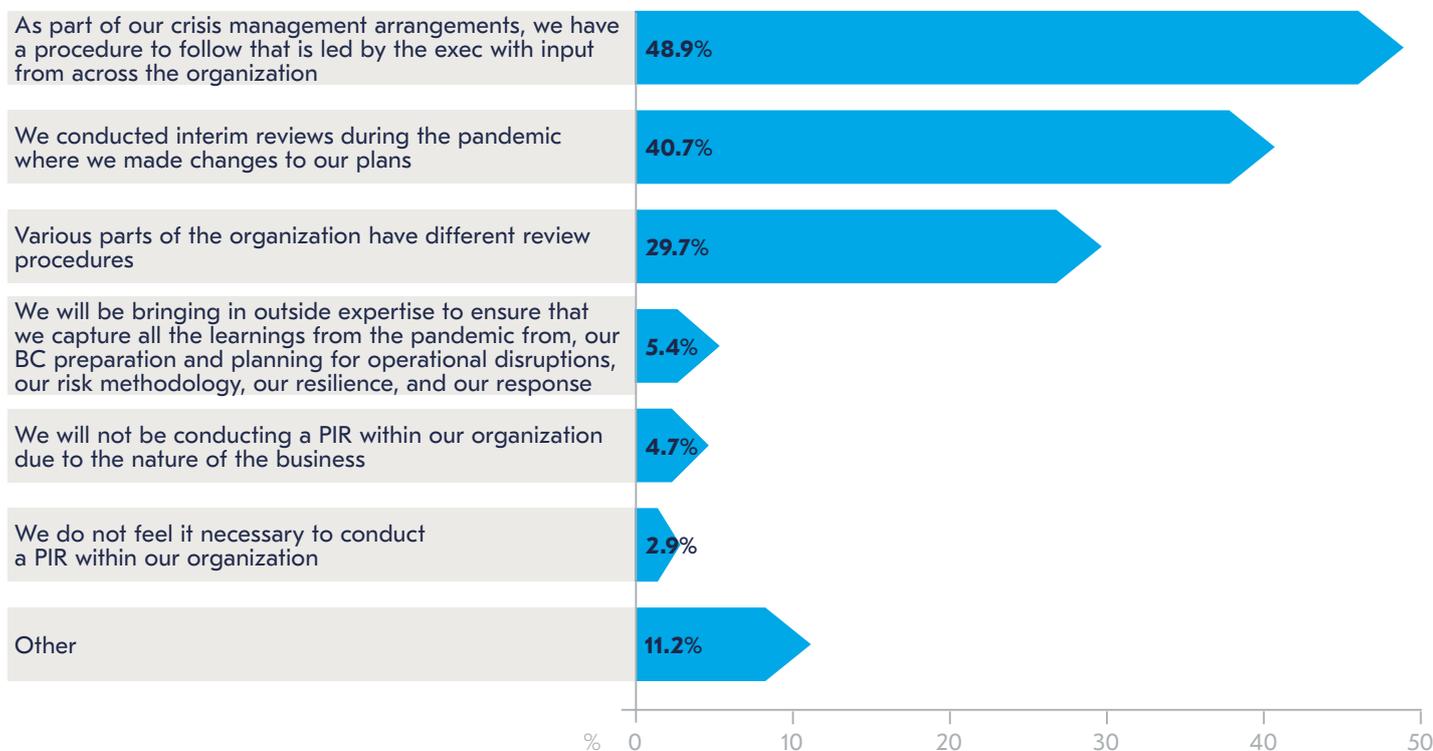


Figure 20. How are you planning to conduct/did you conduct a post-incident review (PIR) for the pandemic?

The importance of post-incident reviews (PIRs) is widely acknowledged across modern organizations, with operational, security, crisis management, disaster recovery as well as BC all seeking to identify the lessons they can learn from their response to a major incident. The 2021 survey suggests that the process of ‘review, revise, refocus’ has been an ongoing one throughout the pandemic. Less than half (48.9%) of respondents shared that the PIR process was either planned or conducted as an executive-led exercise as part of crisis management arrangements. Although it is positive that this is the highest rated criterion of all, it is of concern that over half of respondents report their organizations do not have a process that is led and managed by the exec.

However, other responses show that whilst management may not be leading the review process (as would be considered good practice), reviews are happening and just 2.9% of respondents admitted that no PIR was going to be carried out at all. Given the longevity of the COVID-19 crisis, waiting until the end of the incident is likely to be too late – particularly as there is no defined ‘end’ to the crisis. To counter this, 40.7% of organizations are using interim reviews to review their response and make changes to the plans on an ongoing basis.

Some organizations are still conducting reviews in a disparate way however: 29.5% reported having devolved review responsibilities to different parts of the organization without a centralized process in place. This can lead to full learnings not being shared and absorbed by different parts of the organization, trust issues building, duplication of work and ultimately management receiving differing levels of information (or, in some cases, no information at all) to be able to understand the changes the organization needs to make to be resilient going forward.

“If it’s a short-lived event or an exercise, you carry out the review, at the end, while it’s still fresh in people’s minds. But when it’s a long duration, like COVID, then you need to have a mechanism for capturing that information as it occurs because people’s memory during an event can be short term. Carrying out regular quick reviews during a long event, and implementing them into practice quickly, is a better method rather than waiting until post the event or incident. Furthermore, both the Strategic BIA and the Lessons Learned methodologies gives an opportunity for the Resilience Profession to take senior leadership through what is important to the survival and future success of the organization.”

Resilience Manager, Insurance, United Kingdom

Ensuring resilience in a new working world



Working from home is no longer an emergency solution – how are resilience practices changing to reflect this?

- **While barely over half of organizations (52.6%) had a work-from-home policy in place which ensured the necessary IT infrastructure, policies and management processes were in place, this proved enough to enable business to continue during the pandemic – even though arrangements frequently did not have business continuity cover.**
- **Working-from-home will settle down as an element of both business-as-usual and BC scenarios in future. The balance will be likely to vary from business to business.**
- **Security and resilience risks remain for remote workers: efforts to ensure compliance with resilience, security and health and safety standards are now a greater priority.**

While the shift to homeworking seen at the beginning of the pandemic was sudden and near-universal, it was not a scenario for which no preparation had been conducted. Although many organizations had not considered a pandemic would hit the globe with the depth and breadth of COVID-19 in 2020, many had been increasing the use of remote working – specifically homeworking – for a number of years. ‘Hot desking’, with the resultant reduction in the number of workstations in large offices, has been increasingly popular for the previous decade, particularly in financial services and other sectors where a large proportion of the workforce is based in high-cost, premium office space in crowded city centres. A working week with one day at home had gradually gained popularity among both employers and employees throughout the 2010s as domestic technology improved to the point where most people could work relatively normally in this way. During the pandemic, the number of workers teleworking increased dramatically: the Joint Research Centre at the EU published data to show that pre-COVID-19, just 15% of the workforce had ever teleworked. During the pandemic, this rose to 40% as workers were prohibited from entering workplaces as a result of the virus¹⁰. As a result of the increasing tendency for homeworking to be in place, tests of homeworking and the resilience of networks have been a regular feature of BC rehearsals in many businesses in recent years.

10. European Commission, The (2021). Telework in the EU before and after the COVID-19: where we were, where we head to. Joint Research Centre, EC; 2020. Available at ec.europa.eu/jrc/sites/default/files/jrc120945_policy_brief_-_covid_and_telework_final.pdf (accessed 28 September 2021)

Accordingly, it is easy to over-dramatize the events at the beginning of the pandemic, as dramatic as they no doubt were. A survey respondent commented on this point succinctly.

“The benefits of home working were already known, the future long-term needs will require BC involvement in strategic change.”
 Survey Respondent (Anonymous)



11.3%
 Our business activities involve the creation of our priority products and services require a specific physical environment, tools or machinery or proximity to others. We have therefore not been able to use a work from home model as part of our BC response

52.7%
 We already had a voluntary BAU work from home policy and had the IT infrastructure, policies & management processes in place. Working from home is also part of our BC response capability. We were therefore able to transition quickly to this way of working

15.9%
 We already had a voluntary BAU work from home policy together with the IT infrastructure but it was used rarely, was not scalable and our BC plans and capability did not cover the eventuality of priority activities being carried out from the home

5.7%
 We already had a voluntary BAU work from home policy, but it was outdated and did not consider the realities of current ways of working (e.g. the importance of technology)

14.5%
 We did not have a work at home policy or capability either as part of BAU or BC and therefore had to implement one from scratch

Figure 21. The current pandemic has required many organizations to move from a business model where most people work together in workplaces, to a temporary one where a large number of people work remotely from their homes. What BC challenges has this posed you?

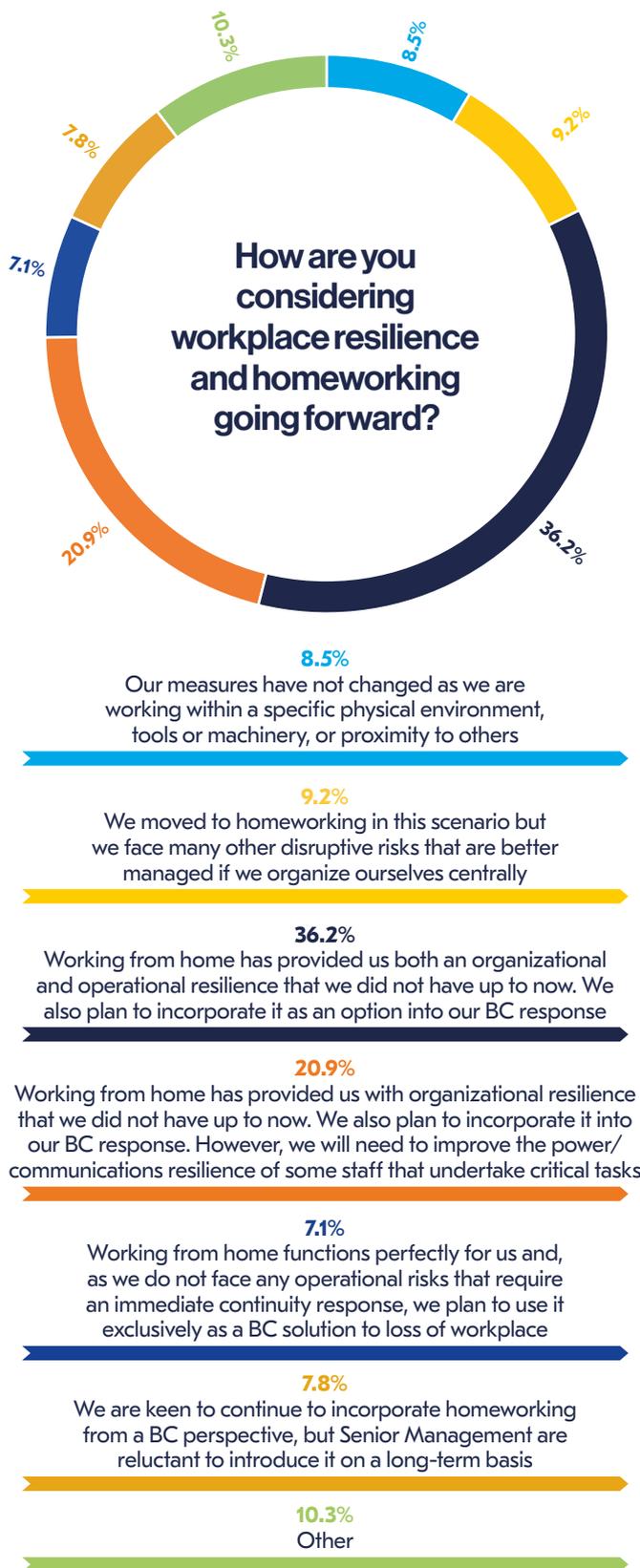


Figure 22. How are you considering workplace resilience and homeworking going forward?

Our 2020 survey suggested that, far from general unpreparedness, more than half of respondent organizations already had a suitable homeworking policy in place before the pandemic. This statistic is supported by a similar result when asked again in 2021 (52.7%), with a further 21.6% stating that they had had a homeworking policy in place prior to the pandemic, but that it had been outdated or unsuitable for the scale of homeworking required. Only 14.5% of businesses had to implement a homeworking policy from scratch as a result of the pandemic.

The 2021 survey asked members how they were considering workplace resilience and homeworking in the future. The most popular response (36.2%) was strongly positive, stating that homeworking had provided their organization with a resilience that it did not previously have, and that it would be incorporated into BC response plans in the future. A further 20.9% chose a similar option, with the caveat that more work would have to be done on the resilience of power and communications for staff undertaking critical tasks. Moreover, 7.1% stated that homeworking functioned 'perfectly' in their case, and that it would be their sole BC solution to loss of workplace in future.

“We already had home working as a key BC strategy. However with the new move towards a hybrid working model, there are risks and issues that need to be addressed to enable this to be a truly effective strategy for our people. For example, all people will need health and safety assessments for home working and additional equipment may be required to facilitate the mix of home and office working.”

Survey Respondent (Anonymous)

Of the respondents exhibiting greater reservations about the continued use of homeworking, 9.2% stated that their organization could confront other risks more effectively if organized centrally, 8.5% said that they were bound by their environment and nature of business to only introduce very limited homeworking, and 7.8% stated that reservations on the part of senior management were obstructing plans to incorporate homeworking into BC activities in future. This is a view which is being battled in the worldwide press at the moment with many CEOs believing staff had the right to work wherever they wanted¹¹, whilst others were actively against the idea and wanted staff in the office due to fears about productivity^{12,13}.

11. Sweney, M (2021). Nationwide office staff can work anywhere in UK when lockdown ends. The Guardian; 25 March 2021. Available at www.theguardian.com/business/2021/mar/25/nationwide-office-staff-can-work-anywhere-in-uk-when-lockdown-ends (accessed 28 September 2021)

12. BBC, The (2021). Goldman Sachs: Bank boss rejects work from home as the 'new normal'. The BBC; 25 February 2021. Available at www.bbc.co.uk/news/business-56192048 (accessed 28 September 2021)

13. Espiner, T (2021). Working from home: Staff abuse it, says City boss. The BBC; 23 September 2021. Available at www.bbc.co.uk/news/business-58662455 (accessed 28 September 2021)

A wide range of narrative responses was received, with the following being typical:

“Work from home may be available for some employees a few days a week, but there will continue to be an office/ on site component. Many positions cannot be done remotely.”

Survey Respondent
(Anonymous)

“Some team members will continue to work from home and our capabilities to do so will remain. But some essential team members have and will continue to work onsite as part of the pandemic.”

Survey Respondent
(Anonymous)

“We are moving into a work from anywhere model which requires a focused discussion around BC risks.”

Survey Respondent
(Anonymous)

As suggested in the *Resilience and Organizational Structure* section, there is clearly no ‘one size fits all’ solution for the short-term future of the working environment. Some organizations will allow staff to work 100% remotely and some will continue to require employees to remain in an office-based environment. Most will lie somewhere in between, with increased homeworking a popular policy during business as usual, and an ever more vital aspect of organizational response to BC challenges. Provided potential weaknesses in areas such as health and safety, communications reliability and power resilience can be countered, homeworking as a BC response seems likely to build both on the pandemic experience and on the work done to enable it in the pre-pandemic period. However, the challenges to build homeworker resilience still have yet to be even recognised by organizations, let alone put into practice.

Work area recovery – use likely to be scaled back, but still a requirement by some organizations

- **Despite the relative success of homeworking, work area recovery sites are likely to remain a feature of BC planning.**
- **Only 5.0% of respondents report their organization will not be renewing their contract with the Work Area Recovery provider, but more than one-quarter will look to scale back their service or otherwise alter their contract.**
- **BC professionals see a role for work area recovery providers in supporting the resilience of homeworkers.**



Figure 23. What are your views about the future of work area recovery?



What services are you now looking for in a Work Area Recovery provider?

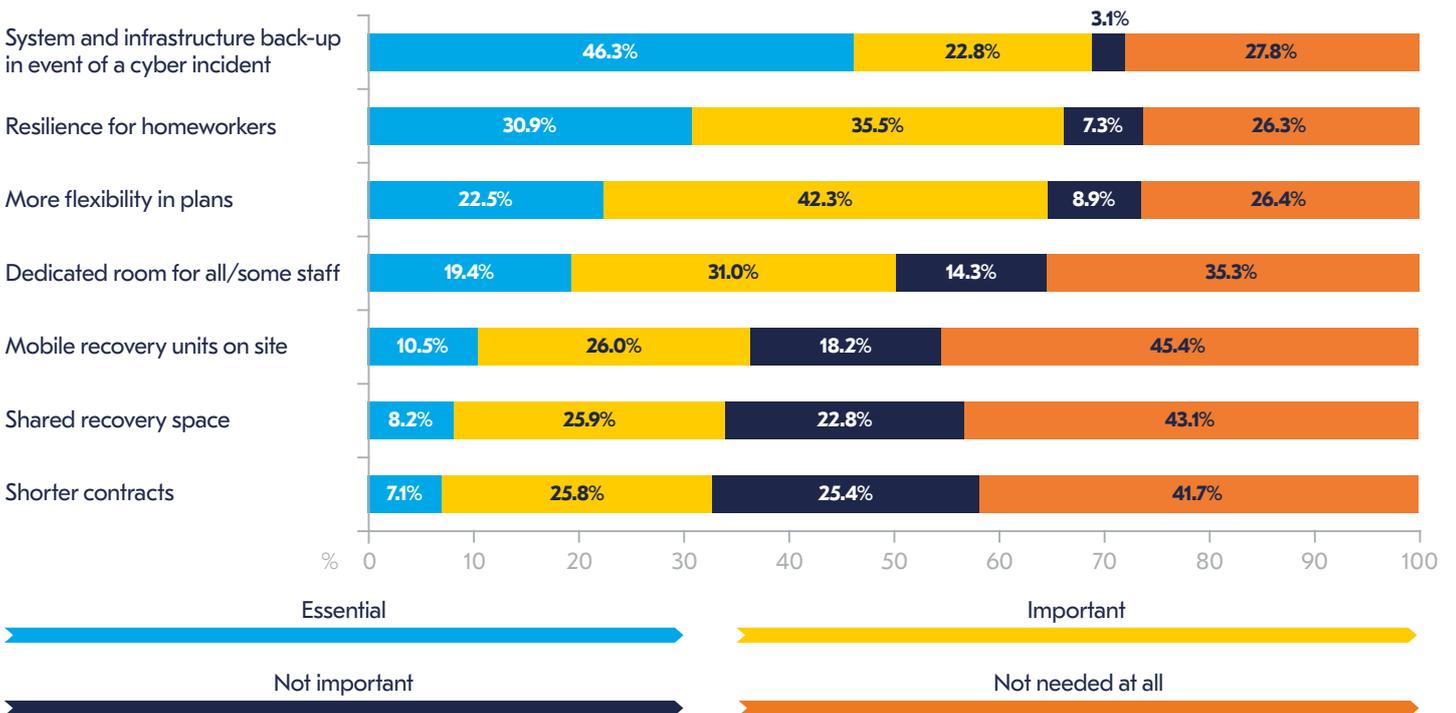


Figure 24. What services are you now looking for in a Work Area Recovery provider?

The questions about the use of homeworking in a BC context inevitably lead to discussion of the future of work area recovery sites, a long-standing element of many organizations' BC response plans in case of loss of workplace. To clarify how common work area recovery sites are in the current environment, we can borrow information from a later question in this survey which suggests that 23.7% of those responding had access to such a facility. But if business can now be conducted from home, are the expense and logistical complication of a work area recovery site, as well as the risks of redeploying people to that site, justifiable in the future?

Relatively few respondents gave an outright 'no' to that question — only 5.0% plan not to renew their contract with their work area recovery provider upon expiry, with slightly fewer stating that they would be exploring alternatives (just over a third did not employ such a site to begin with). However, among those who will continue to use a work area recovery provider (42.8% of the total), less than one-half (16.2%) plan to continue as before, with reductions in the scope of their contract or changes to the design of workplace-loss scenarios being more likely. Interviewees reported in last year's *Future of BC and Resilience* report that they were frustrated at not being able to use their work area recovery provider for split working with 18.1% admitting they would look for this in a future provider. Now organizations have already changed their working models with many now confident that homeworking will be their preferred backup solution, this question did not feature in this year's survey.

The data shows that whilst work area recovery provision might have to adapt to new ways of working and new BC practices, there is still clearly a future in the industry — albeit a different one. Indeed, one response stated clearly:

"We are [a work area recovery provider] and as such we see the opportunity to grow ourselves as a positive out of the pandemic."

Survey Respondent (Anonymous)

So, if work area recovery provision has to change, how should it change? What do BC professionals want their providers to offer in the new working environment? Respondents were offered seven options and asked to rank them as either 'essential', 'important', 'not important' or 'not needed'.

The offering with the most rankings of 'essential' (46.3%), and the most combined 'essential' and 'important' (69.1%), was system and infrastructure backup in the event of a cyber incident. This would be likely to have scored even more highly in the years immediately prior to the pandemic, when high-profile cyber incidents, many of them relating to ransomware, moved out of the specialist IT and BC media and into mainstream news outlets. It is heartening to note that BC professionals are focused primarily on the likeliest source of the next threat, rather than simply expecting a repeat of the current one.

Nevertheless, the other responses mean that it is not simply a case of the status quo ante for work area recovery providers. The second most popular offer of those proposed to respondents (30.9% considering it 'essential') was resilience for homeworkers, suggesting that providers could modify their services to allow those working remotely to have more reliable infrastructure and communications. If, for example, employees are working on critical activities in the remote environment, ensuring that worker's home environment is resilient is essential for business continuity. More flexibility in plans was also highly ranked (22.5% 'essential'), but explicitly shorter contracts were deemed essential by only 7.1%, the fewest of any option.

The market for work area recovery provision is thus set to change — it is almost impossible for it not to with the expansion of homeworking. However, it is not likely to disappear, in part because of this imperative to evolve, and in part because of BC professionals' reluctance to put all of their eggs in the homeworking basket and also because some sectors, such as those in the financial services sector, still require physical backup as a regulatory requirement. The business can still survive and thrive.

Longer pandemic, longer memories – more time now to make change

The phrase ‘never let a good crisis go to waste’ is attributed to Sir Winston Churchill. Although it may well have predated him, in BC terms it has never been more appropriate than it is today. It is important to carry the lessons learned during the pandemic forward into future challenges – both as a collective of BC professionals and within individual organizations. The 2020 survey showed a sense of urgency among respondents – most believed that they only had six months to take advantage of the learnings of COVID-19 before it became yesterday’s news. A year later, we can see that the pandemic is still very much today’s news, so does the six-month timeframe still hold?

How long do you feel we have to take advantage of the learnings of COVID-19 and shape the industry before it becomes yesterday’s news?

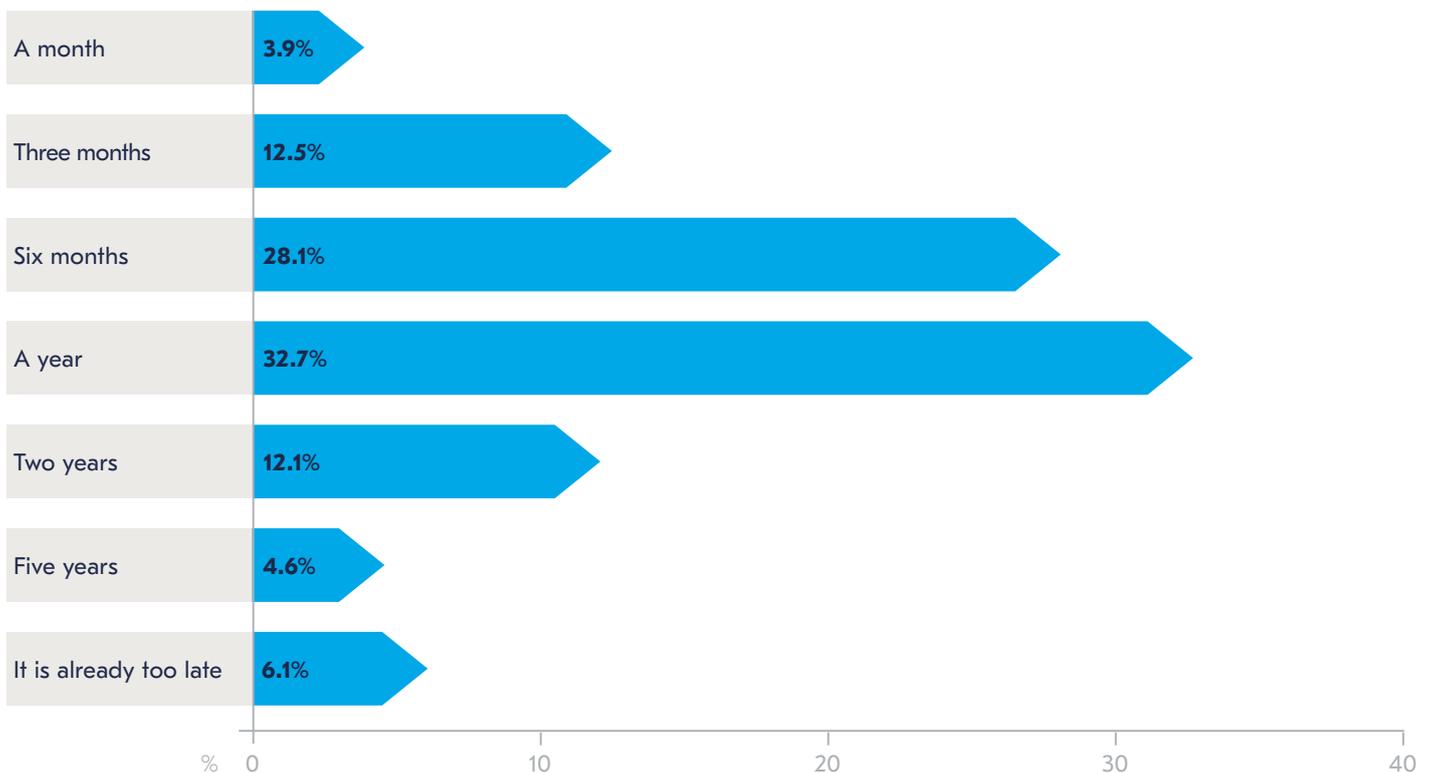


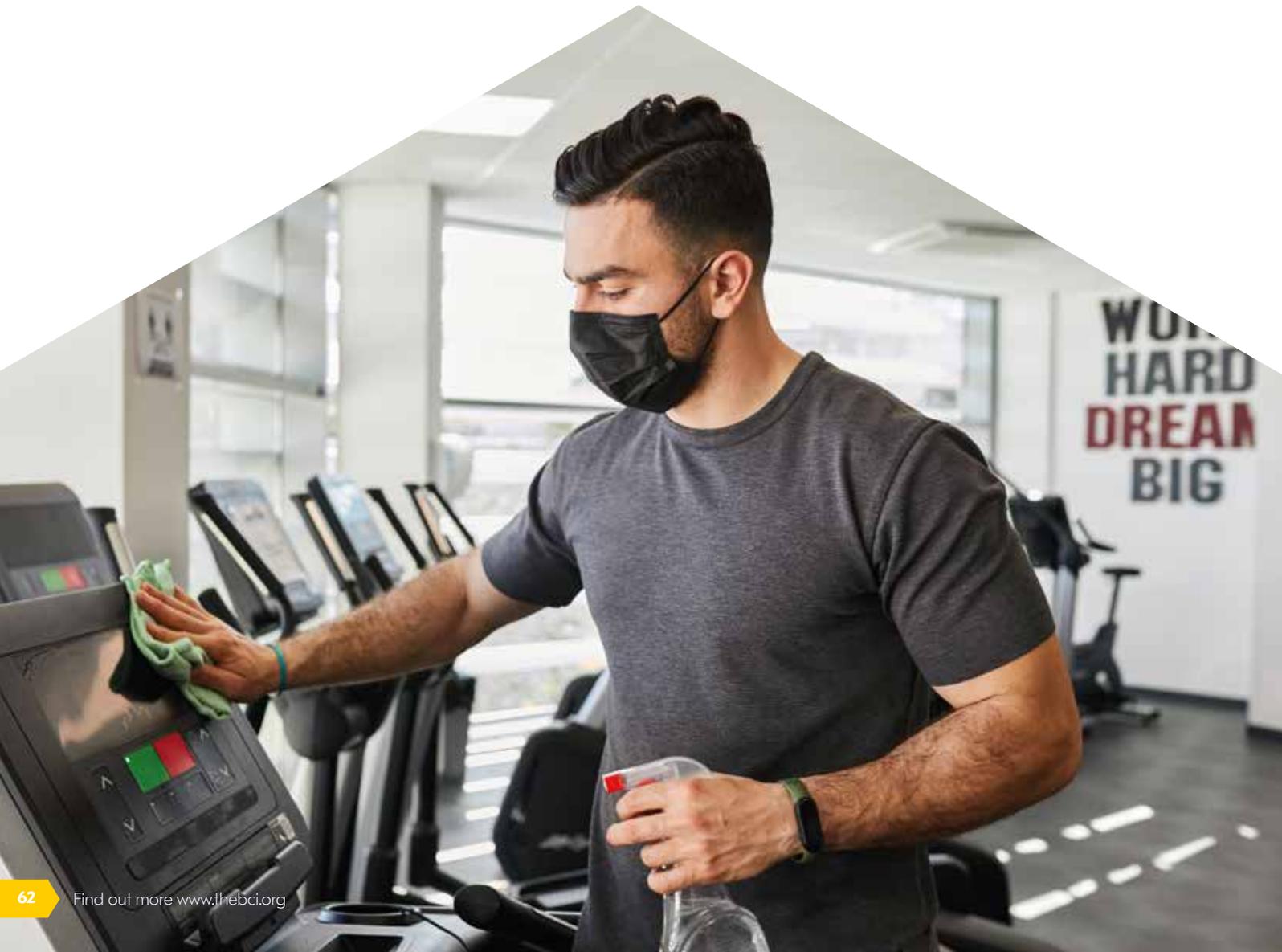
Figure 25. How long do you feel we have to take advantage of the learnings of COVID-19 and shape the industry before it becomes yesterday’s news?

The good news is that BC professionals appear to believe that, as the pandemic has grown longer, so will the institutional memories relating to it. The most popular response to the 'how long have we got?' question in 2021 was one year (32.7%), albeit with six months not far behind on 28.1% and three months in third place (12.5%). Less optimistically, 6.1% of respondents believe it is already too late to take advantage of what we have learned from the pandemic, a number that chimes with the sense of disillusionment seen in the section on organizational collaboration, above. Should COVID-19 still be a fact of daily life come the 2022 survey, the responses will be an interesting exercise in whether this proportional duration of agony and memory can be sustained.

One interviewee commented that although the pandemic had started to break down siloes, there was still work to be done – but there window for being able to do that was closing in.

“How do we capitalize on the pandemic? That, to me, the big question because we don't have these type of big events very often. And you always want to come out of this with a more forward-facing view of resilience. And what, sadly, I'm not seeing right now is that we have actually done that so I hope that we're going to continue that breakdown of the silos. We need to keep working how do we get people to talk together and break that down. I think what I hope is that we now have a really good opportunity to change things, but we're edging toward the end of that window, in all honesty, of when people will think we get it.”

Global Business Continuity Manager,
Leisure & Hospitality, United Kingdom



Covid-19 is not the only game in town – natural disasters threaten resilience more than ever

It is easy to believe that COVID-19 is the only story of any importance for BC practitioners in the current environment. However, just as cyber-attacks did not stop during the pandemic, 2020/21 has produced some of the most fearsome natural disasters in recent history. Wildfires, heatwaves, extreme cold and snowfall, drought and flooding have all made global headlines in the last 18 months, and these have all caused huge disruption to business activity, both directly and in the form of interruptions to power and communications services. Furthermore, for many nations, COVID-19 has not been the greatest issue facing their countries in the past two years. Incidents such as these increase the attractiveness of work area recovery sites for BC purposes – preferably at some distance to the original office or the areas where homeworkers are concentrated.

Considering some of the events that have happened in the past year related to extreme weather (e.g. Texan power outage, Australian and North American heatwaves) as well as areas plagued by regular power outages, how are you ensuring your workplaces (office and home) are resilient?

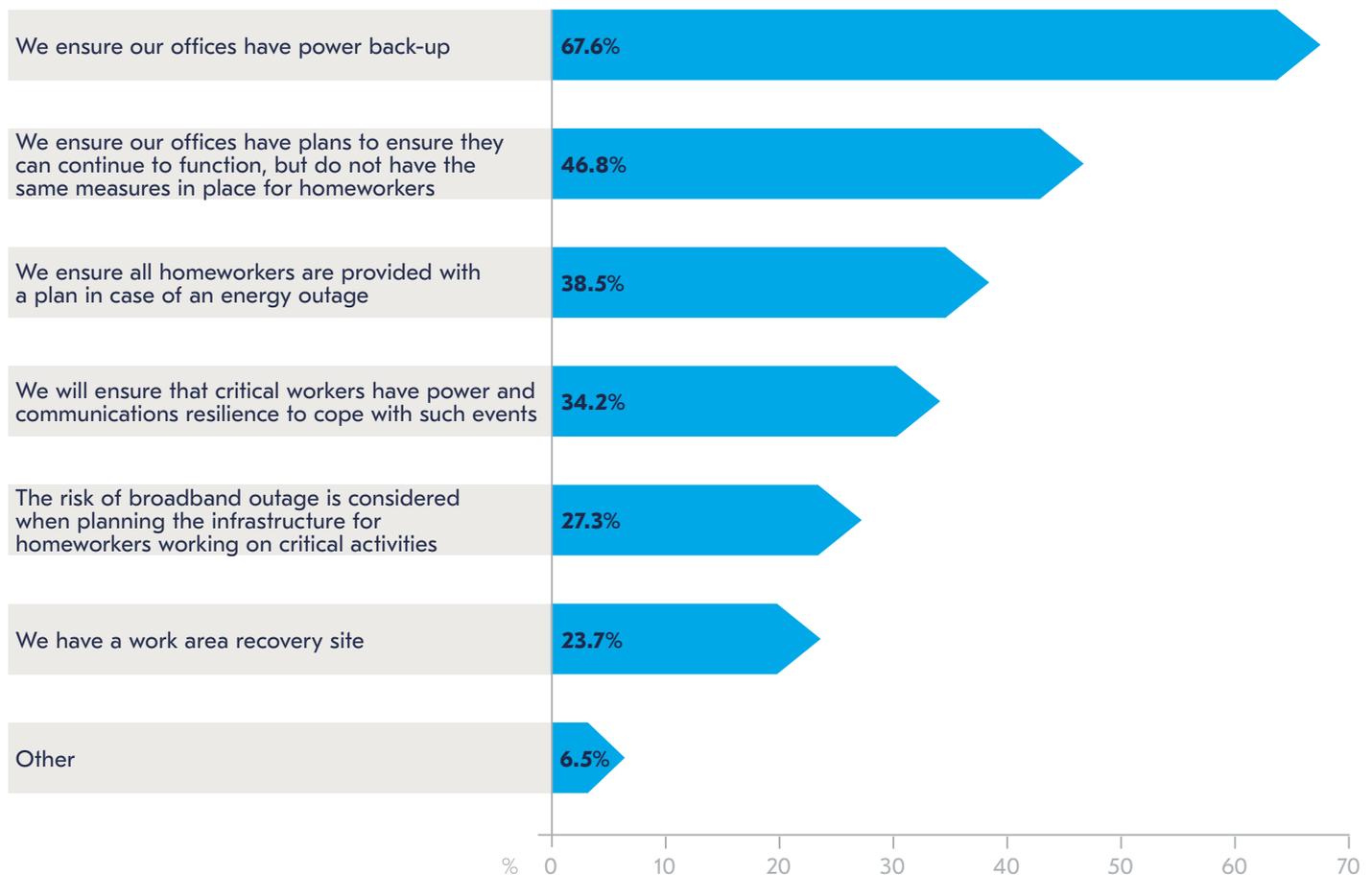


Figure 26. Considering some of the events that have happened in the past year related to extreme weather (e.g. Texan power outage, Australian and North American heatwaves) as well as areas plagued by regular power outages, how are you ensuring your workplaces (office and home) are resilient?

In our 2021 survey, we asked how BC professionals were ensuring their workplaces — both office and home — were resilient in the face of such challenges. More than two-thirds stated that their offices had a power back-up. Almost half (46.7%) stated that their offices had plans to ensure they could continue to function, but that no such arrangements were in place for homeworkers. Some organizations are looking at a reverse scenario and bringing workers back into the office if they had power or IT outages within their home environments. This is a logical next step for BC in the new hybrid office environment, and 38.5% of respondents said that this was already the plan within their organizations. Slightly more than a third stated that they ensured that their critical workers had power and communications resilience in case of outages, while 27.3% said that the risk of outages was accounted for when planning homeworking deployments for personnel performing critical activities. As stated above, 23.7% had a work area recovery facility.

An interviewee discussed that whilst their organization had made the switch to homeworking very quickly, it still needed to address areas such as power back-up for certain workers, whilst another discussed how they moved entire workstations to workers' homes if they were performing critical activities within their home environment.

"I haven't mentioned back-up power generation yet, but it's come up. I've discussed it with my colleague and I'm looking at it from my own perspective as well. I'm probably going to move house. And where we are, I'm going to make sure I've got a generator for my house and I'll make sure it's in the next house I move into. But yeah, it's not something we've addressed at an organizational level. However, I can't see many organizations saying 'OK, we've got 30,000 people who are going to be working from home two days a week. We're going to make sure everybody has got a generator attached to this and that'. But I think you would be looking at some of those things. And it should also dictate some of the criteria of who you allow to work from home or what their working arrangements might be."

Head of Risk, Healthcare, United States

"We moved everything to working from home. It was hurried, made up on the fly during COVID, but everyone did an incredible job keeping functions operational. Traditionally, in business continuity you send all non-critical staff home and you stopped doing those non-critical activities. But during COVID we didn't do that, EVERYTHING was established remotely. We literally moved people's desks from the office to home and they were expected to do everything that they normally did. This is a change to continuity thinking."

Senior Manager, Resilience, Australia

Another interviewee discussed how while the power and internet back-up problems were resolvable in the United Kingdom, those in their Indian office required more back-up support for remote working and, in some situations, returning staff back to the office was the only solution.

"I can continue working using my laptop and my mobile phone for a period of time without mains power, but in India we provide our critical staff with backup power. They have backup generators and mobile internet connectivity in case of the loss of main services. However, one of the problems with even this level of redundancy is that the Indian government, at times, turn off the internet during civil uprisings. We can't mitigate for this and in this scenario, they would have no choice but to go into the office. But what do you do during a lock down and staff are unable to move?"

Resilience Specialist, Telecoms, United Kingdom

Time for resilience good practice guidelines?

The final question in the 2021 survey asked whether it would be timely for the BCI to champion a set of “resilience good practice guidelines” targeted at executive level to bring all levels of resilience together, and operate alongside the existing BC GPGs. The idea met with the approval of 73.9% of respondents – a number which is in line with last year’s report - while only 5.0% disagreed outright and believed that the BCI should concentrate solely on BCI. The remainder were unsure or gave a narrative answer, a rather higher figure than for most questions – judging by these responses and by the answers to questions on the issue from 2020 we can suggest that this may be a function of ongoing uncertainty regarding the difference between BC and resilience. The narrative replies indicated a wide range of opinion regarding the benefit of a set of resilience GPGs produced by the BCI.

“I'm torn on this one as I think we need to be careful of overloading on resilience with the recent introduction of operational resilience. There is a lot of focus on Ops Res across the financial industry and it can quite easily become entangled with Organizational Resilience, which as we know is a very different subject. My initial thought, is "yes, great idea" but actually, maybe the BCI should stick to BC for now?”
 Survey Respondent (Anonymous)

“Absolutely! It's time BC stopped pushing up hill and we marketed ourselves. But we need a hook to show our value and that's what we don't and never have had.”
 Survey Respondent (Anonymous)

An interviewee thought that there was a real need for a resilience GPG to be created due to the changing market of resilience.

“[Senior management] doesn't want to hear the same old same old. They really want to see that we're scanning widely and thinking broadly, focusing on tomorrow's challenges today. Even if we currently don't have all the answers and are not bringing solutions to them immediately, at the very least, we're conscious of what challenges and opportunities lie ahead. I would strongly encourage the BCI to develop that good practice guide on organizational resilience.”
 Security and Resilience Director, Energy, Australia

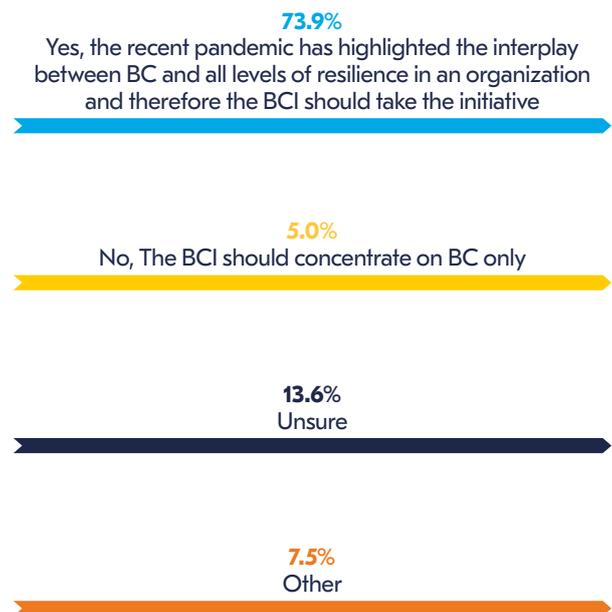


Figure 27. Do you feel that it would be timely for the BCI to champion a “Resilience Good Practice Guidelines” targeted at the executive covering how to bring of all levels of resilience activity in a business together so that they are aligned?

Annex



Demographics



Survey dates



Respondents



Countries



Sectors



Respondent Interviews

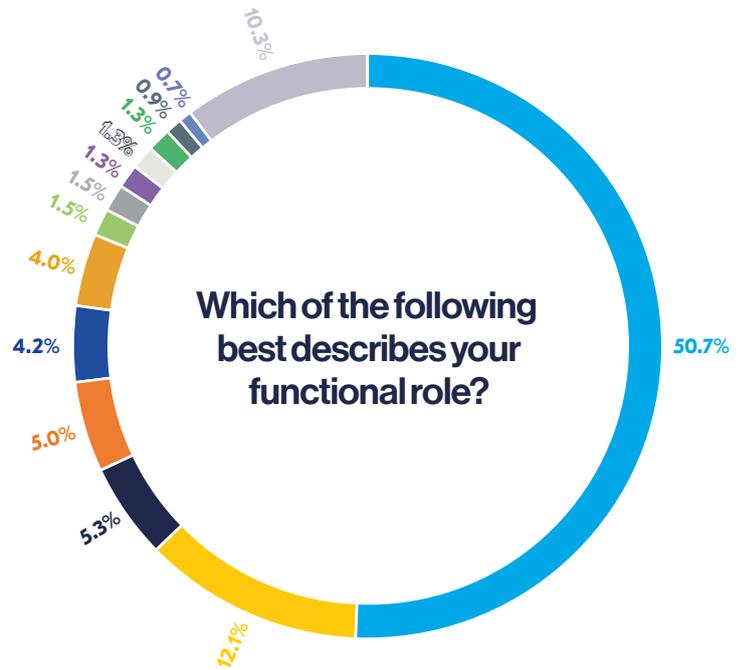


Figure 28. Which of the following best describes your functional role?

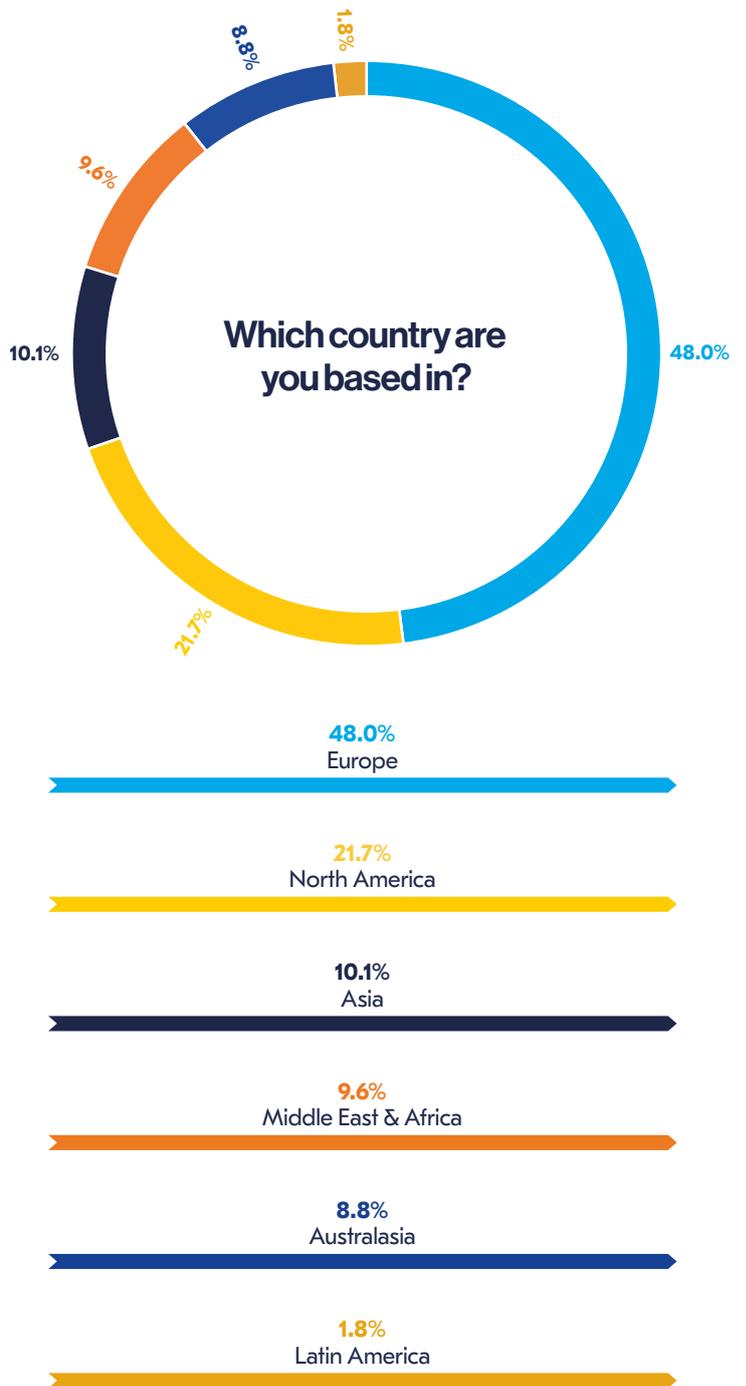
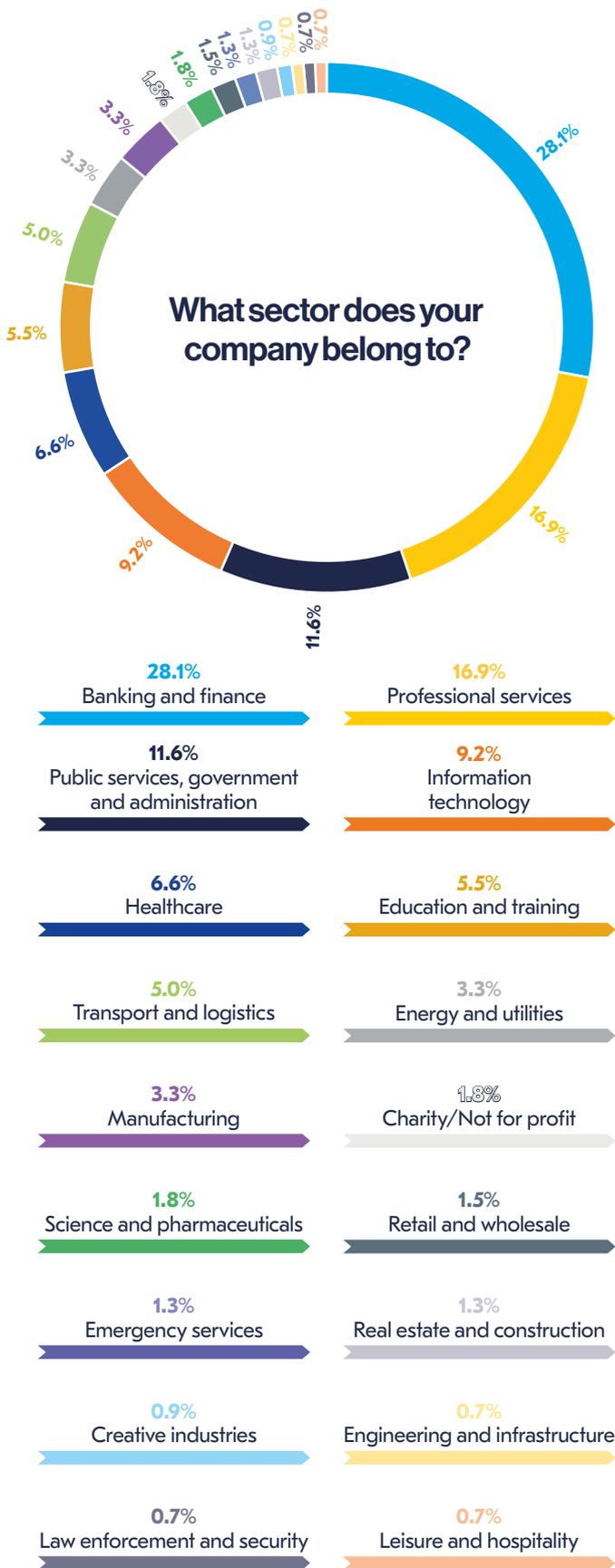


Figure 29. What sector does your company belong to?

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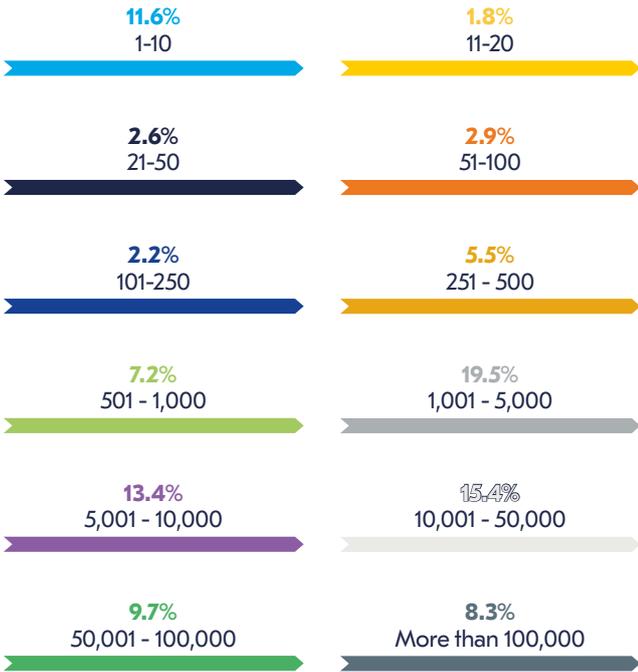


Figure 30. Approximately how many employees are there in your organization globally?

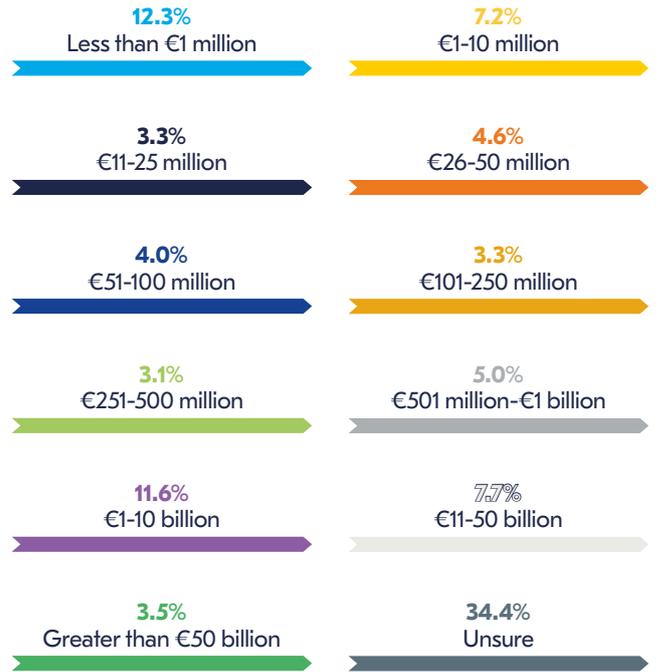


Figure 31. What is the approximate global annual turnover of your organization?

About the Authors



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Rachael has twenty years' experience leading commercial research within organizations such as HSBC, BDO LLP, Marakon Associates, CBRE and BCMS. She has particular expertise in the technology & telecoms, retail, manufacturing and real estate sectors. Her research has been used in Parliament to help develop government industrial strategy and the BDO High Street Sales Tracker, which Rachael was instrumental in developing, is still the UK's primary barometer for tracking high street sales performance. She maintains a keen interest in competitive intelligence and investigative research techniques.

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About the BCI



Founded in 1994 with the aim of promoting a more resilient world, the Business Continuity Institute BCI has established itself as the world's leading Institute for Business Continuity and Resilience. The BCI has become the membership and certifying organization of choice for Business Continuity and Resilience professionals globally with over 9,000 members in more than 100 countries, working in an estimated 3,000 organizations in the private, public and third sectors. The vast experience of the Institute's broad membership and partner network is built into its world class education, continuing professional development and networking activities. Every year, more than 1,500 people choose BCI training, with options ranging from short awareness raising tools to a full academic qualification, available online and in a classroom. The Institute stands for excellence in the Resilience profession and its globally recognised Certified grades provide assurance of technical and professional competency. The BCI offers a wide range of resources for professionals seeking to raise their organization's level of Resilience, and its extensive thought leadership and research programme helps drive the industry forward. With approximately 120 Partners worldwide, the BCI Partnership offers organizations the opportunity to work with the BCI in promoting best practice in Business Continuity and Resilience.

The BCI welcomes everyone with an interest in building resilient organizations from newcomers, experienced professionals and organizations. Further information about the BCI is available at www.thebci.org.

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About ResKube



ResKube Limited is an award-winning innovator providing simple, cost effective resilience for critical homeworking staff and small offices.

Hybrid working is here to stay, and organizations now need to develop their infrastructure to support the new way of working. The award winning ResKube range is an elegant solution to a surprisingly complex and messy problem – how to make homes of critical workers as resilient as offices.

5-10% of workers fall into this category with a broad range of roles from Executives and key decisionmakers to customer facing call centre staff.

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