



SECURITY IN THE NEW NORMAL



**HOW THE COVID-19 CRISIS WILL HAVE
A LASTING IMPACT ON SECURITY**

TABLE OF CONTENTS

3	Introduction
4	The New Normal
12	Security in the New Normal
13	Conclusion
14	References
15	Postscript

INTRODUCTION

It was Abraham Lincoln who said, "The best way to predict your future is to create it." And to create your future you have to look ahead. Plan your tomorrow now.

The purpose of this guide is to assist you in creating your security future. We will consider the habits, impacts and trends of the COVID-19 crisis so that you can create your security concept for tomorrow.

This guide is the result of a global collaboration of G4S Academy Specialists from all over the world. Sources were collected and online brainstorming sessions were organised. Different views and different cultural backgrounds were taken into account. This guide is the result of a thorough cross-border analysis in a co-creation approach.

After this introductory chapter, in the second chapter we will consider the question of what the "New Normal" (the post-COVID-19 world) might look like. Twelve new habits, impacts and trends are identified and discussed. Chapter three links the New Normal to the security solutions, taking into account habits, impacts and trends. In the last chapter, we reach the conclusion of this guide and in chapters five and six we refer to the references and formulate a postscript.

We would like to conclude this introduction with a purpose statement and a call for action. The intention of this guide is not to present a complete and all-encompassing view on the post-covid 19-security New Normal, but to elaborate and provide qualitative insights from G4S experts as a thought-starters for the creation of the security future of your organisation.

Following our G4S Academy approach "Knowledge Created Together" and "Value Created Together", we would appreciate your feedback and insights on this guide. Together we know more.

Please email us your thoughts, agreements, and disagreements to this address info@G4SAcademy.com.

THE NEW NORMAL

To determine the impact of the New Normal in Security, we must first define it and then understand its future impact.

For the purposes of this guide, we will define the New Normal as the COVID-19 (atypical) situation that will become the standard, the usual, or expected after COVID-19.¹ In other words, the question we want to answer is: “Which situations emerged during the COVID-19 crisis, will continue to be perceived as normal even when COVID-19 is not a clear and present danger for us anymore?”.

Giving you a detailed view of the New Normal has its fair amount of assumptions, and what we can do in this guide is to try to predict those habits, impacts, and trends that have emerged during the COVID-19 crisis and of which we think they will last (at least for some time). These lasting habits, impacts, and trends will be part of the New Normal and they can help you in defining the scenarios of your security future.

These are the 12 habits, impacts, and trends post-COVID-19 we have identified:

SOCIETAL HABITS

- 01** MORE FOCUS ON HEALTH PROTECTION
- 02** INCREASED SOCIAL AWARENESS
- 03** MORE REMOTE EVERYTHING
- 04** LESS TRAVELING

ECONOMIC IMPACTS

- 05** COST OPTIMISATION
- 06** MORE UNEMPLOYMENT
- 07** INCREASED LOCAL SOURCING
- 08** HIGH NEED FOR COMPLIANCE

SECURITY TREND

- 09** MORE AUTOMATION
- 10** BOOSTED DIGITISATION
- 11** NEW THREATS
- 12** NEED FOR NEW SECURITY PERIMETERS

SOCIETAL HABITS

01 MORE FOCUS ON HEALTH PROTECTION

Our focus on health protection will remain high on the agenda.

This will translate into continued attention for infection prevention and control. We expect to see more infection awareness (being informed, staying home when sick, vaccination), more testing and screening (fever detection and screening systems, infection-free & immunity certification, contact tracing), and faster deployment and acceptance of collective and personal protection measures (physical distancing, disinfection (by liquids and light), masks, gloves, screens, etc).²

02 INCREASED SOCIAL AWARENESS

The COVID-19 crisis has taught us to be more socially aware.³

We are mindful of our place in society, of our purpose. We acknowledge the communities we operate in (elders, youth, people with disabilities, colleagues, etc). We also reflect more on our individual social connections. Our need for human contact, as well as the distance we sometimes need to respect.

During the crisis, people provided each other with help, and well-intentioned quid pro quos may have arisen from this. After the crisis, it may well be that for our own security or the security of our goods we can count on individuals or our nearest community to help us.



03 MORE REMOTE EVERYTHING

Remote working, remote shopping, remote sporting, remote entertainment, everything has turned remote and the most surprising fact is that it is working.⁴

People adapted to the obligation of keeping a safe distance and have adopted the remote technology that was already present in their lives. Remote monitoring by virtual guard rounds as an alternative to physical guard rounds has been in high demand and this will probably remain so.

This remote everything habit will undoubtedly have a huge impact on the real estate industry. They can expect vacancies, a high demand in flexibility (flexible offices/multichannel retail spaces) and in the short term a pull-back on investments. Due to the impact of COVID-19 on the real estate sector, the static guarding services could also undergo a transformation. More digital, more infection prevention and control and an even greater importance of the hospitality function are possible consequences.

04 LESS TRAVELING

COVID-19 has challenged everything about travelling: no more using “confined spaces” to move (planes, trains, cars, buses, etc), no more crossing borders, no more hotel nights, etc).⁵ Where possible, travelling is replaced by remote systems or doing things locally.

When travel is unavoidable it is subject to very strict procedures imposed on all stakeholders (airlines, baggage handlers, airports, etc).⁶ Security in this sector has been hit very hard and has had to reinvent itself at a rapid pace: new frisking methods, additional screenings, boarding by seat numbers, cabin disinfection, more disease intelligence and more compliance obligations.

ECONOMIC IMPACTS

05 COST OPTIMISATION

The COVID-19 crisis has caused sharp contractions in the level of output, household spending, corporate investment, and international trade.⁷ The leisure and culture sector has even completely stopped. With no or less revenue coming in and production halted, companies have started cutting costs. In the best-case scenario in 2020 the monetary loss of global Gross Domestic Product (GDP) is expected to be about 76.7 billion U.S. dollars. In a worst-case scenario the global GDP is predicted to lose about 346.98 billion U.S. dollars.⁸

This cost-cutting is done company-wide and has thus also impacted the security budget. Security activities are being rationalised. Security may be asked to be made more LEAN and efficient, among others by dispensing with personnel or equipment deemed superfluous, or replacing them by new technology. This will oblige security professionals to be more agile, meaning they will need to have the ability to put new operating models in place (internal or external), supported by the right processes and governance.

06 MORE UNEMPLOYMENT

The International Labour Organisation estimated that in the second quarter of 2020, worldwide working hours have declined by 6.7%, which is equivalent to 195 million full-time workers losing their jobs globally.⁹

Taking into account that scientific research has shown that for example, U.K. and Italy suffer about 45,000 and 80,000 additional monetary crimes per year for one percentage point increase in the unemployment rate¹⁰, this worldwide unemployment will have a considerable impact on criminality and thus the need for security.

While at the start of the COVID-19 crisis we have seen a reduction in crime, we expect a negative trend in the post-COVID-19 era. This potential surge in unemployment will induce a need for security which is clearly contrary to the cost optimisation impact mentioned above. Companies will have to balance their security cost to the potential crime damage that they will be willing to bear.

07 INCREASED LOCAL SOURCING

Opting for locally produced products is moving from a national pride to a necessity. Buying local has been gaining popularity across the globe over the past couple of years. But as fears about COVID-19 spread, borders closed and countries went into lockdown, local sourcing became sometimes the only solution. This might have some important repercussions:

- Companies may be forced to depend more increasingly on local products as supply from beyond country borders may be stressed; if the supply streams come under pressure, the importance of securing them will increase.
- Retailers and manufacturers may want to repatriate foreign production back to their home countries.
- Consumers may deepen their trust for locally sourced/produced products in all markets.
- Global companies will need to highlight their global advantages together with their local elements due to heightened scepticism towards distance prone supply chains.

Security can assist in protecting the local production units, supply chains and retail activities.

08 HIGH NEED FOR COMPLIANCE

COVID-19 has created unprecedented regulatory disruption in a condensed period. Rules were relaxed, deadlines were extended, new obligations were imposed on both companies and consumers (lockdown, protection measures, etc.). By proclamation of extraordinary legislation there are massive changes to how government, labour, social security, financial and other institutions operate. **Companies need to be aware of these changes and need to adapt to them. What regulators and supervisors expect has in some cases moved from white to black.**

That said, the unchanged existing legislation also remains applicable. Where companies and consumers find a creative solution to the challenges laid upon them by COVID-19, the pre-COVID19 law must also still be respected.

In security, this applies to legislation on private security, but also to legislation on health care (viz. temperature sensing and screening), data protection & privacy (viz. physical distancing apps), prevention (PPE obligations), labour and social security.

SECURITY TRENDS

09 MORE AUTOMATION

The COVID-19 crisis has caused a rise in interest for technology by which processes or procedures are performed with minimal human assistance.¹¹ (i.e. a desire for a more frictionless way of life) . This interest in automation is especially high when it comes to “contactless technology”. With this term we refer to the fact that post-COVID-19, when choosing a technology to perform a process or procedure (physical distancing enforcement) one will rather choose the technology that guarantees the greatest human distancing (an on edge AI camera, or bluetooth enabled proximity reader – i.e. contactless) than any other (human intervention). Other examples include self-opening doors combined with automated customer counting and flow control (as to comply with the physical distancing rules in shops), facial recognition, counters with screens, integrated fever screening and detection, remote monitoring systems, robot- and drone guarding, etc.

Automation has a paradox though – the more efficient the automated system, the more crucial the human contribution of the operators in order to respond if something goes wrong. Humans are less involved, but their involvement becomes more critical.¹² When automating security it is key to keep this paradox in mind.

10 BOOSTED DIGITISATION

Perhaps one of the most notable consequences of the COVID-19 crisis is that it has given the digital transformation an immense boost. At the basis of this boost is the remote everything habit that was imposed on us.

We believe that digitisation will continue, including security. Where information will have to be processed without any emotional factor (pure binary observation), consideration of the digital approach as a better solution should be given. Security examples are: apps for the detection of social distancing or AI for the detection of wearing PPE (Personal Protective Equipment). Digitisation can also help at the level of human cooperation. Within the context of our enhanced social awareness, smartphone applications can be used to support detection by communities and trigger intervention by security. The delivery of our security might also be more digitised. Risk Operations Centres (ROCs) will play a central role in this digitisation. They will be the hub where the digitised information will merge and where smart operators (humans supported by AI) will act upon the information received as agreed on with the customer.

These ROCs will also add situational awareness and insight to our security and safety staff in the field, which will enable them to respond faster, smarter and more effectively.

This said, we'll need to be sensitive to the high need in compliance. Disruptive digitisation can be directly opposed to legislation, industry standards or even human needs. Information and guidance on matters such as privacy, health legislation and working habits will be cardinal.



11 NEW THREATS

COVID-19 also brings new threats. Interpol and Europol outlined the following evolving threats:

- Marked increase of cyber threats including malicious domains, malware and ransomware.
- Health service providers and essential products outlets increasingly targeted as critical infrastructure.
- Fraudulent and counterfeit trade in personal protective equipment (PPE) and anti-viral pharmaceuticals.
- Increased drug commerce via social media, encrypted apps and the Darknet, Individuals and businesses on reduced incomes potentially becoming targets of loan sharks.¹³

Once the crisis has passed and a wave of vaccinations has made us more immune to this virus, new threats may emerge, based on our fear of a new pandemic (false tests or even fake news). That is why it is particularly important that threat and risk analysis is part of every company's continuous improvement plan.

The gathering of security intelligence and the processing of this intelligence in the operational activities, but also in the business continuity plans, will become an essential activity of security professionals. The threat will never stand still and will constantly evolve to try and stay one step ahead of us. The creation of new ways of working creates new vulnerabilities that, left unchecked, will be exploited by the threat.¹⁴

12 NEED FOR NEW SECURITY PERIMETERS

It was already the rule in cyber security: an IT-perimeter is a dynamic concept that is placed as close as possible to the employee of a company. The COVID-19 crisis has the same impact on the perimeter in physical security. Now that everything is remote, companies have to wonder whether their physical perimeter has not moved to the front doors of their employees.

Has the residence of (some) of their employees and the residence's content or what is being said within its walls, become an asset to be protected? This is a question security needs to address. In any case, the perimeter of the companies has moved. After all, infection prevention and control must be implemented as early as possible in the access flow. Where the perimeter was often located at the facade or the reception of the company, it is now pushed back to the parking lot or even further beyond.



SECURITY IN THE NEW NORMAL

Now that we have framed the New Normal based on twelve habits, impacts and trends, we want to consider the question of which security solutions and associated products and services will be decisive in the New Normal.

The G4S Integrated Security Solution approach is defined as "a combination of security solutions designed to manage risk, drive compliance and provide business value". It consists of three broad concepts of security solutions:

The New Normal will have an influence on all three Security Service Areas and on the products and services associated with them. COVID-19 will increase the interest in a number of existing products and services, generate innovation for new products and services, but also make some products and services obsolete or at least downgrade their relevance or importance.



PEOPLE SERVICES

SECURITY THROUGH PEOPLE

Solutions that look at interaction, presence, prevention, response, managing, communication, and optimisation



PROFESSIONAL SERVICES

SECURITY THROUGH INTELLIGENCE

Solutions that look at awareness, policies, procedures, behaviour, intelligence, consulting and design



TECHNOLOGY & DATA SERVICES

SECURITY THROUGH TECHNOLOGY

Solutions that look at systems, integration, analytics, detection and delay

CONCLUSION

In January 2016 the World Economic Forum published a report called “The Future of Jobs; Employment, Skills and Workforce Strategy for the Fourth Industrial Revolution”.¹⁵ In this report the Forum sought to understand which skills would be decisive in 2020 to manage the key disruptions coming our way.

The top three skills they identified were:

- Complex Problem Solving
- Critical Thinking
- Creativity.

They could not have been more right.

In this guide we have identified twelve post-COVID-19 habits, impacts and trends that will influence the security solutions that might become the ‘New Normal’. Now it is up to you. We invite you to use this guide and combine it with your problem solving, critical thinking and creativity skills to conquer the challenges you face and to create your own security future.



REFERENCES

- (1) cf. Oxford Advanced Learner's Dictionary
- (2) World Health Organisation, "Rational use of personal protective equipment for coronavirus disease (COVID-19) and considerations during severe shortages", Interim guidance, 6 April 2020, 28.
- (3) UN, SHARED RESPONSIBILITY, GLOBAL SOLIDARITY: Responding to the socio-economic impacts of COVID-19, March 2020, 26.
- (4) <https://trends.google.com/trends/explore?date=today%201-m&q=remote%20work>
- (5) World Tourism Organisation, "Impact assessment of the COVID-19 outbreak on international tourism", Updated, 24 March 2020, 16.
- (6) World Health Organisation, "Operational considerations for managing COVID-19 cases or outbreak in aviation Interim guidance", 18 March 2020, 5; IATA , "Quick Reference for Ground Handling during COVID-19 Quick Reference for Ground Handling during COVID-19", April 3, 2020, 9.
- (7) OECD Research, Evaluating the initial impact of COVID-19 containment measures on economic activity Updated 14 April 2020, 6
- (8) Asian Development Bank, The Economic Impact of the COVID-19 Outbreak on Developing Asia, 6 March 2020, p9, 14.
- (9) ILO Monitor: COVID-19 and the world of work. Second edition Updated estimates and analysis 7 April 2020, 11.
- (10) Duha Tore Altindag, "Crime and Unemployment: Evidence from Europe", Louisiana State University Working Paper, 2009-13, 37.
- (11) Groover, Mikell (2014). Fundamentals of Modern Manufacturing: Materials, Processes, and Systems.
- (12) Bainbridge, Lianne (November 1983). "Ironies of automation". *Automatica*. 19 (6): 775–779.
- (13) Europol, Pandemic profiteering how criminals exploit the COVID-19 crisis March 2020, 11; Interpol, Preventing crime and protecting police: INTERPOL's COVID-19 global threat assessment 6 April 2020, 4.
- (14) <https://www.weforum.org/agenda/2020/04/coronavirus-pandemic-effect-sdg-un-progress/>
- (15) World Economic Forum, "The Future of Jobs Employment, Skills and Workforce Strategy for the Fourth Industrial Revolution", 2016, 167.

POSTSCRIPT

This guide “Security in the New Normal, how the COVID-19 Crisis will have an impact on Security” was written by Yannick De Smet (yannick.desmet@be.g4s.com) as the primary subject manager and Steen Bonke Sørensen (steen.sorensen@g4s.com) with co-creation from the G4S Academy Specialists from Austria, Belgium, Denmark, Estonia, Netherlands, United Kingdom, United States, among others.

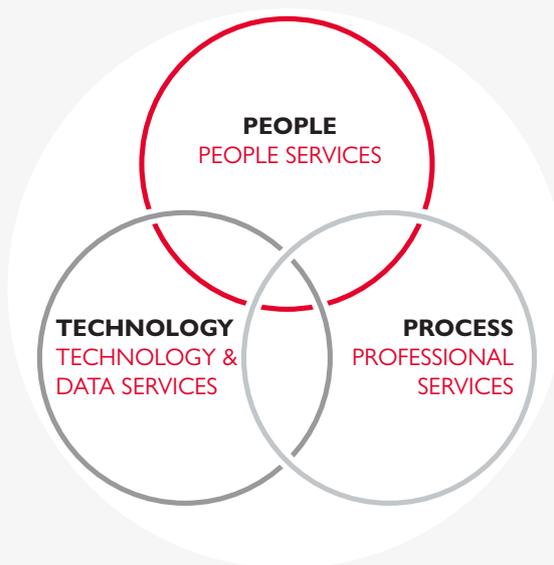
The information in this guide is given in a summary format. Before acting on any information in this guide, you should consider the appropriateness of the information having regard to these matters.

This guide may contain forward-looking statements including statements regarding our intent, belief or current expectations with respect to the physical security services businesses and operations. Readers are cautioned not to place undue reliance on these forward-looking statements. G4S does not undertake any obligation to publicly release the result of any revisions to these forward-looking statements to reflect events or circumstances after the date hereof to reflect the occurrence of unanticipated events.

G4S

Our purpose is to create sustainable value by delivering industry-leading, technology-enabled security solutions and outstanding service for our customers.

Our integrated offering combines the best security professionals with cutting-edge technology and data analytics.



We operate in around 85+ countries around the world with 558,000 employees, providing our customers with unmatched global coverage.

THE G4S ACADEMY

The G4S Academy is a platform within G4S that allows us to work more collaboratively with our customers, suppliers, partners and other stakeholders to create knowledge and value together.

The G4S Academy's mission is to use our global knowledge and expertise to co-create industry-leading solutions, products and services that will improve how we provide safety, security and business value to our customers.

We define Value as the triple bottom line – environmental value, social value and economic value.

Security and safety has become a fundamental component of business operations. Many of our traditional customers are changing their focus from managing safety and security to fueling business growth. This is one of the biggest challenges that executives in the security industry face today and this is forcing all of us to communicate our value in a completely new way.

Find out more about the G4S Academy at <https://www.g4s.com/what-we-do/g4s-academy>





VALUE CREATED TOGETHER

CONTACT

Get in touch with the G4S team – visit www.G4S.com

g4s.com