



# Getting America Back To Work

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A Landscape Analysis

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1025 F Street NW | 9th Floor | Washington, DC 20004  
3 Columbus Circle | New York City | NY, 10019  
P 202.337.0808 | [info@gpg.com](mailto:info@gpg.com) | [www.gpg.com](http://www.gpg.com)



# The Plan is No Plan

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In the absence of detailed federal government direction, state, local, and private sector leaders are being left to decide how to slowly transition the country back to work.

The result is a fractured and patchwork approach that not only causes confusion and contradictory standards but also threatens to generate further outbreaks and greater long-term economic pain.

The endgame to the pandemic remains a widely available, working vaccine – while biopharmaceutical companies continue to rapidly develop candidates, experts continue to warn of long development and distribution times.



# Does Back Mean Back?

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**Governments around the world are discovering that reopening is likely another beginning, not an end. In the absence of a COVID-19 vaccine or herd immunity – and without any widespread tracking and contact tracing methods – companies are being left to develop their own roadmaps to returning to work safely.**

On May 11, Twitter CEO Jack Dorsey announced that the company will look to retain [remote working](#) practices beyond COVID-19, allowing all employees to work from home indefinitely. One day later – and just 41 miles south of Twitter’s San Francisco headquarters – Tesla CEO Elon Musk [reopened](#) his vehicle manufacturing plant in Fremont, CA, defying county orders and publicly challenging California lawmakers to arrest him.

Businesses across other industries – like dine-in restaurants, arts / entertainment venues and studios, sports teams, and non-essential manufacturers – do not have the luxury of responding to the challenges of COVID-19 with either of these extremes.

As governments loosen mandated restrictions in a piecemeal fashion, businesses are facing the unenviable challenge of how to reopen safely and navigate the new normal alone.

Reopening is only the first hurdle. Staying open will prove to be harder, as companies juggle both the economic and health repercussions of easing restrictions.

Companies will need to be prepared to make tough and ongoing decisions on reopening and closing as they manage localized outbreaks and find the right balance of health monitoring.

# Government

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Two weeks ago, without direction from the federal government, state governments began loosening restrictions and allowing businesses to reopen.

Today, repercussions of reopening have begun to show in states across the country, with the number of new cases of COVID-19 trending upward in states that have eased restrictions.

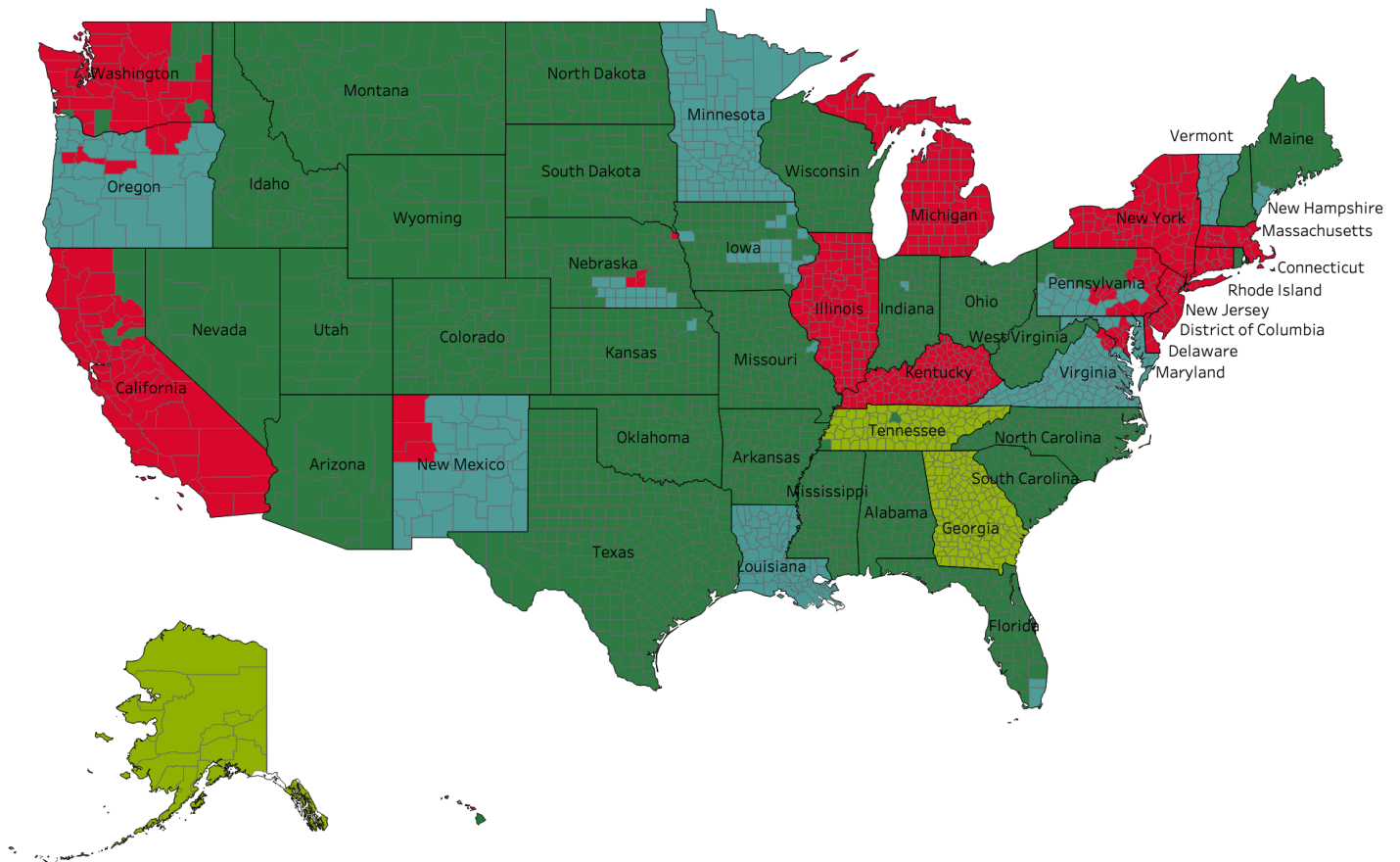
On Thursday, long after states began reopening, a new high-level tool kit was released by the [CDC](#) for schools, communities, and businesses.



# State of the States

With most states now partially reopening...

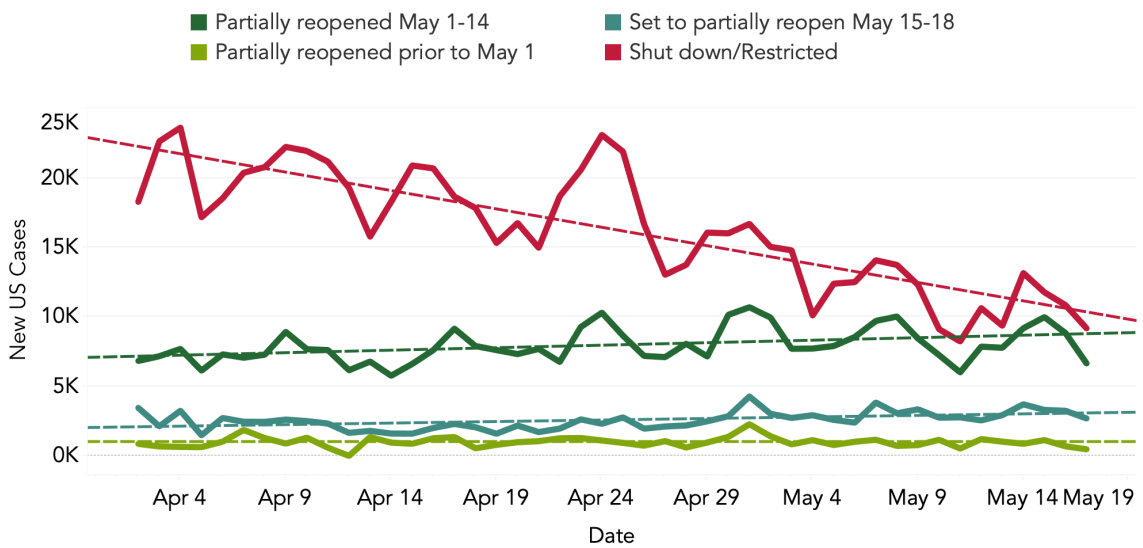
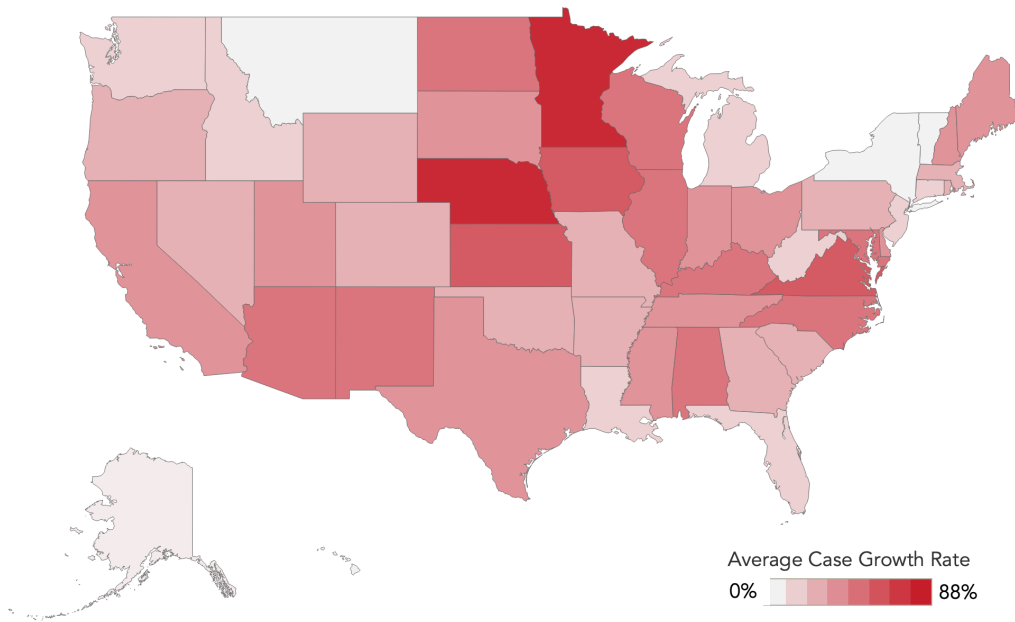
- Partially reopened May 1-14
- Set to partially reopen May 15-18
- Partially reopened prior to May 1
- Shut down/restricted



# State of the States

... confirmed new cases in those states trend upward.

GROWTH OF NEW CASES FROM MAY 1 TO MAY 17



# Global Responses

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Internationally, COVID-19 is wrecking health systems and economies in equal measure. Some countries have reopened swiftly, subsequently resulting in renewed lockdowns, while a small number are standout successes. Here are some factors that made the difference.

The Center for American Progress has released an [analysis](#) comparing the U.S. coronavirus response to those of other nations. Based on nine case studies, these are the best practices from the countries that have most successfully combatted the pandemic:

- **Early action is essential:** The most [successful](#) countries took early and aggressive steps on lockdowns, testing, and contact tracing while isolating those who tested positive or were at high risk of having the disease.
- **The public health response cannot be considered separate from the economic recovery:** Successful countries only considered partially reopening their economies once they had flattened the curve.
- **Safely reopening requires testing and contact tracing,** as evidenced by [South Korea](#), Taiwan, [Australia](#), and [New Zealand](#): Such widespread testing and surveillance capability will be necessary to monitor any resurgence of the disease.
- **Even after reopening, continued social distancing is necessary:** New Zealand is keeping museums, libraries, and gyms closed. Meanwhile, [Denmark](#) and Germany are easing restrictions by allowing parts of schools to

reopen, along with businesses that follow certain precautionary measures. [Taiwan](#) maintains widespread temperature checks, and many of its businesses have asked customers to wear face masks.

- **Additional waves of the virus should be expected:** After initial success in coping with the virus early in the pandemic, [Singapore](#) has experienced a second wave of infections, likely due to a failure to enforce precautionary measures in populations of migrant workers.

**The unique case of Sweden:** Sweden has seen a [higher fatality rate](#) than other [European](#) countries that imposed lockdowns but far lower cases and fatality rates than countries like Italy and Spain. Sweden has maintained a relatively low level of transmission despite not taking aggressive steps to impose a national lockdown. Some experts have attributed this to the country's strong healthcare system and high levels of public trust, which have led people to be cautious and pursue social distancing without mandates from the government.

# Private Sector

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With the prospect of months or even years of COVID-19 ahead and with loosened government restrictions, businesses have begun cautiously reopening, finding new ways to operate safely, changing their work practices, and making medium-term decisions for their workforces.

Businesses with workforces reliant on in-person interactions are among those struggling to find the safest path to restarting. For office-based businesses, a new question has emerged: If remote work is effective, why reopen at all?





## GPG ANALYSIS:

# Largest Employers in the U.S.

As unemployment skyrockets to levels not seen since the Great Depression, companies are scrambling to adapt, with some implementing new protocols to reopen safely and others settling into remote working. GPG analyzed the largest private employers in the United States to find patterns of a recovery on the march back to work.

In an analysis of publicly available back-to-work plans of the largest employers in the United States – collectively accounting for over 14.5 million workers – GPG found businesses largely divided into four categories:

**1. Essential businesses operating through COVID-19 with modified work practices, like grocery stores and delivery services.**

Businesses performing essential work along the goods and food supply chain, particularly in grocery stores and packing and distribution centers, have remained open but changed their work practices. Many stores, like Walmart, Target, and CVS, have added plexiglass sneeze guards, hand sanitizing stations, social distancing guides, and rigorous cleaning to protect employees and customers.

**2. Office-based companies continuing to work from home.**

Most corporate offices remain closed with no immediate plans to return. Working from home will be normal practice for most non-essential office workers.

**3. Customer-facing businesses whose operations were interrupted are adapting to enable contactless interactions.**

Starbucks, McDonalds, and Gap, collectively employing almost 1 million people, will reopen stores in the U.S. throughout May. Cashless payments, spaced-out in-store dining, and voluntary self-health monitoring for workers are among the practices that will be implemented.

**4. Non-essential companies reliant on physical gatherings are struggling to find the right back-to-work plan – with a few notable exceptions, like Ford.**

Large employers critical for the economy are struggling to navigate without clear direction. In considering reopening, companies should weigh whether in-person gathering is necessary for their business model, and, if it is, how it can be done most safely. Employers should also consider how to most effectively and clearly communicate these considerations to their workforce.

# GPG ANALYSIS:

## Largest Employers in the U.S.

A selected overview of publicly available or reported on back-to-work plans from the top employers in the United States:

Essential/Never Closed	Back-to-Work Plans Released/Currently Reopening	No Released Back-to-Work Plans
<ul style="list-style-type: none"> <li>• Albertsons</li> <li>• Amazon</li> <li>• Aramark</li> <li>• Costco Wholesale</li> <li>• CVS Health</li> <li>• Dollar General</li> <li>• Equinox</li> <li>• FedEx</li> <li>• Home Depot</li> <li>• Jabil</li> <li>• Kroger</li> <li>• Lowe's</li> <li>• McDonald's – Takeout</li> <li>• PepsiCo</li> <li>• Publix Super Markets</li> <li>• Target</li> <li>• United Parcel Service (UPS)</li> <li>• Walgreens</li> <li>• Walmart</li> </ul>	<ul style="list-style-type: none"> <li>• AT&amp;T</li> <li>• Boeing</li> <li>• Darden Restaurants</li> <li>• Ford Motor Company</li> <li>• Gap</li> <li>• General Motors</li> <li>• Hilton Worldwide Holdings</li> <li>• IBM</li> <li>• JPMorgan Chase</li> <li>• Lear Corporation</li> <li>• Marriott International</li> <li>• McDonald's – Dine-In</li> <li>• Starbucks</li> <li>• Walt Disney</li> <li>• TJX</li> <li>• Verizon Communications</li> <li>• Wells Fargo</li> <li>• Yum! Brands</li> </ul>	<ul style="list-style-type: none"> <li>• Berkshire Hathaway</li> <li>• Citigroup</li> <li>• Cognizant Technology Solutions</li> <li>• Dell Technologies</li> <li>• HCA Healthcare</li> <li>• Johnson &amp; Johnson</li> <li>• Oracle</li> <li>• Synnex</li> </ul>

- According to the [Wall Street Journal](#), **McDonald's** has drafted a 59-page dine-in reopening guide for its U.S. restaurants. The guide lays out several stipulations and recommendations, including closing public soda fountains, cleaning restrooms every 30 minutes, and removing some tables to ensure a 6-foot distance between customers.
- On May 14, **Walt Disney** and unions representing Walt Disney World workers [reached an agreement](#) regarding protections to be put in place when the Orlando park reopens, including mandatory face masks for workers and guests and touchless transactions at cash registers. No reopening date has been set for any of Disney's four U.S. theme parks.
- **Equinox** has released an extensive [guide to safely reopening](#) their fitness centers. The guide covers

heightened cleaning protocols, customer health checks, sanitation stations, PPE, and reduced capacity venues.

- In a memo on May 13, **Wells Fargo** told [employees](#) to continue working remotely through at least June 30, though operations are not likely to return to business as usual the next day.
- **JPMorgan Chase** has said its nearly 260,000 employees may return to work on a "rotational basis more permanently, [according](#) to one vision of the future of work sketched out by Co-President Daniel Pinto in a private meeting with Citigroup Inc. research analysts."
- **Dell Technologies** CEO Michael Dell said remote working will become a "permanent feature" at the company in an [online webinar](#) on May 12.

# The End of the Office?

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**The transition to working from home for office-based workers has led employers to an unexpected discovery – it can work.**

Since March, millions of office workers across the United States have been working from home. As businesses have adapted, rolled out new technologies, and established new practices, they have begun to think of the [future of work](#).

Adding to these considerations is the realization that the requirements needed to maintain a [socially distant workplace](#) can be [onerous](#).

The new workplace will likely feature significant modifications, including [limited elevator capacity](#), alternating shifts, sneeze guards, the [end of open plan](#) layouts, [temperature checks on entry](#), stopping communal food preparation, and larger meeting tables. For city-based firms, there are additional complexities around asking employees to navigate crowded [public transport systems](#) to and from work.

Businesses that can retain and engage positively with their remote workforces will succeed. The next challenge will be managing how long term working from home will impact childcare and education services, as well as needing to change recruitment and hiring practices, while nurturing younger cohorts of the workforce.

***We've proven we can operate with no footprint.***

***Can I see a future where part of every week, certainly part of every month, a lot of our employees will be at home?***

***Absolutely.***

— James Gorman, Morgan Stanley CEO to [Bloomberg News](#)

# Public Health

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As states lift their lockdown orders, tensions between economics and politics meet public health authorities' imperatives to prevent the continued spread of COVID-19. Amid debates around how best to reopen society while keeping people safe, all eyes are on vaccine developers.

Leaders in the race to develop a vaccine have emerged, and conversations around the ethics of accelerating the development process have intensified.



# State of the Vaccines

While an effective COVID-19 vaccine would mark a key turning point in our fight against the global pandemic, experts continue to warn of the complexities related to developing and distributing a vaccine.

As Dr. Anthony Fauci told Congress Tuesday, “There’s no guarantee that the vaccine is actually going to be effective.” Still, biopharma companies across the globe are rapidly advancing their vaccine candidates.

According to the Milken Institute’s [“COVID-19 Treatment and Vaccine Tracker,”](#) there are currently 133 vaccines in development. The eight vaccines currently being tested in humans are:

- **Moderna:** Cambridge, Mass.-based Moderna began a Phase 1 trial of its mRNA vaccine in 45 volunteers back in March and [just announced](#) that it has received FDA approval to proceed to Phase 2 testing of 600 individuals. If all goes well, the company expects to move into Phase 3 trials in early summer and could begin manufacturing the vaccine as [early as July](#).
- **Inovio:** A Phase 1 trial of Inovio’s potential vaccine against COVID-19 [began in April](#). The pharmaceutical company is testing its DNA vaccine candidate in 40 healthy volunteers. Expect to see data around initial immune responses and safety late this summer; at which point the company hopes to move into a Phase 2/3 efficacy trial.
- **Oxford University:** It has been widely reported that the Oxford team aims to produce 1 million doses of its vaccine candidate by September, should it prove effective. The experimental recombinant viral vector vaccine – which involves placing genetic material from the coronavirus into another genetically-modified virus – entered a Phase 1 study of [around 1,110 healthy volunteers](#) on April 23.
- **Pfizer/BioNTech:** The pharmaceutical giant, in partnership with German drugmaker BioNTech has [dosed the first study participants](#) in two separate Phase 1/2 trials of their vaccine, in both Germany and in the U.S. The development program includes four vaccine candidates, each using mRNA technology. Pfizer said it hopes to produce “millions” of vaccines by the end of this year, and “hundreds of millions in 2021,” should one of these candidates prove effective.
- **CanSino Biologics, Sinovac, and the Beijing and Wuhan Institutes of Biological Products:** Human trials [for four vaccine candidates](#) are currently underway in China. Public health experts worldwide will be closely watching the country’s efforts to rapidly advance and manufacture a vaccine.

The U.S. Government continues with [Operation Warp Speed](#), with the goal of making 100 million doses of a vaccine against COVID-19 available by November.



# AN EMERGING CONVERSATION: Ethics & Accelerated Vaccine Trials

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As the race to develop a vaccine intensifies, expect to see conversations around the ethics of accelerating the vaccine development process intensify. Central to the emerging debate is how scientists can best balance speed with safety in testing potential vaccines.

At the heart of these discussions is the concept of "[challenge trials](#)," in which healthy volunteers would be deliberately infected with COVID-19 to test the efficacy of a vaccine candidate.

The tactic was first proposed in an article published on March 31 in the [Journal of Infectious Diseases](#) and further endorsed by Stanley A. Plotkin, a physician and vaccine developer from the University of Pennsylvania, and Dr. Arthur Caplan, a bioethicist at NYU Langone Medical Center in the journal [Vaccine](#).

Shortly thereafter, [35 members of the House of Representatives](#), led by Bill Foster (D-IL), a physicist, and Donna Shalala (D-FL), the former secretary of the Department of Health and Human Services, submitted a letter to the U.S. Food and Drug Administration requesting the authorization of these trials.

Supporters of challenge trials believe that limiting such trials to healthy young adults at relatively low risk of serious disease could speed the vaccine development process, ultimately reducing global mortality and morbidity related to the novel coronavirus.

But others – like Christine Grady, chief of the Department of bioethics at the NIH clinical center – argue that because it is still not fully understood how the virus affects the body, and because there are no existing treatments for COVID-19, challenge studies raise thorny ethical issues.

"There's so much emerging information about this sort of clinical course of infection and also susceptibility to infection that it makes an assessment that it's OK to subject a certain age group to risk a little bit too fast for me," she told STAT News.

