

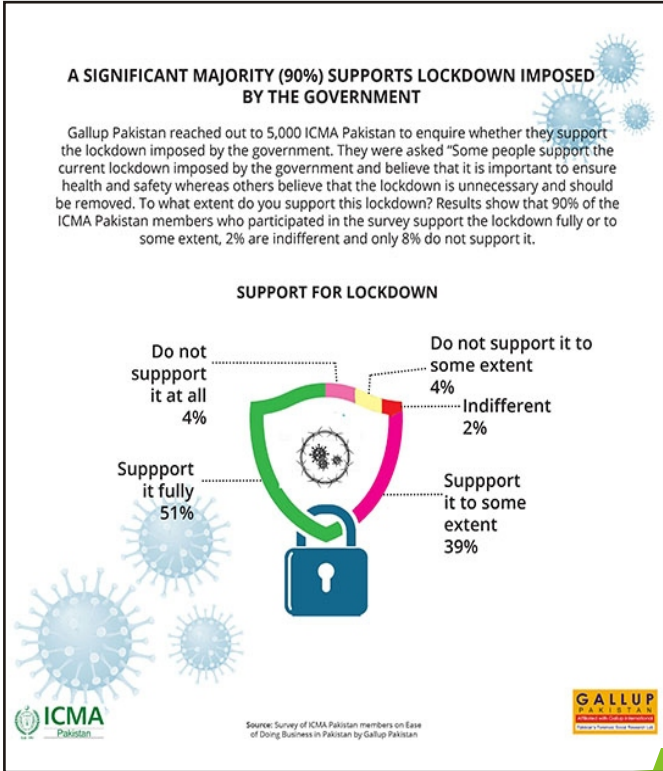
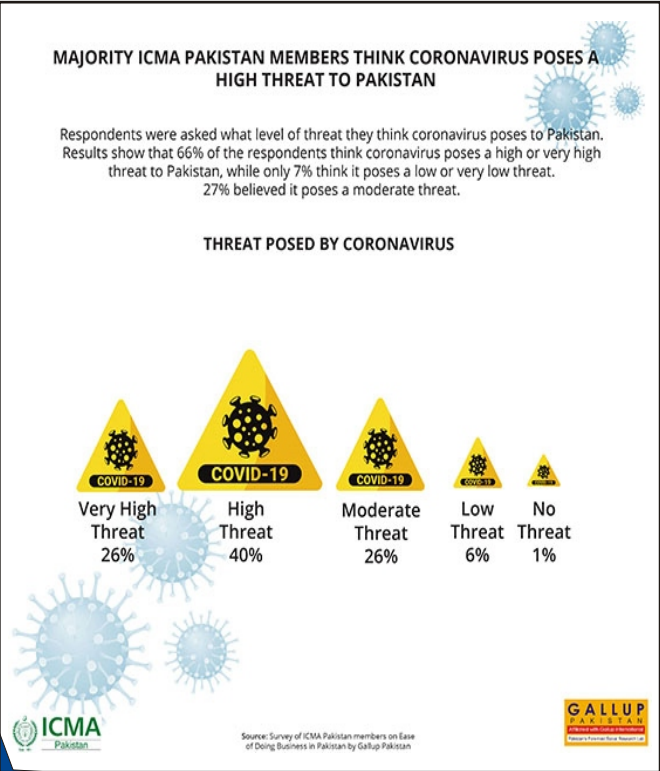


Gallup Pakistan Survey on Impact of COVID-19 on Members of ICMA Pakistan

ICMA Pakistan initiated a survey through Gallup Pakistan on the impact of COVID-19 Pandemic on the members of ICMA Pakistan. The objective of the survey was to get first-hand information from the members on how they feel about COVID-19; how they are doing under lockdown period and what their organization is doing to facilitate them doing this hard time while working from homes. The survey was conducted by Gallup Pakistan which was complete on April 30, 2020. The highlights of the survey and the infographic presentation are provided below:

Highlights of Survey Results

- o Majority ICMA Pakistan members think coronavirus poses a high threat to Pakistan
- o A significant majority (90%) supports lockdown imposed by the government
- o Majority respondents (91%) complying with lockdown to ensure health and safety
- o Only 6% say they their relatives or someone in their vicinity tested positive for covid-19
- o Nearly 7 in 10 ICMA Pakistan members face difficulty buying essentials due to the lockdown
- o Nearly 6 in 10 know of someone who became unemployed due to the outbreak
- o For nearly half ICMA Pakistan members (47%), the coronavirus poses a high threat to employment or business
- o Majority organizations taking adequate internal measures to protect staff from contracting coronavirus
- o Over half (56%) ICMA Pakistan members say their organization has allowed them to work from home
- o 4 in 5 ICMA Pakistan members say working from home would affect their performance and efficiency
- o No layoffs in 3 in 4 ICMA Pakistan member organizations
- o 3 in 4 ICMA Pakistan members not receiving redundancy pay from their organization
- o 4 in 5 ICMA Pakistan members part of relief efforts for people affected by lockdown
- o Only 15% ICMA Pakistan members believe practicing members of ICMA Pakistan have a restricted role post covid-19

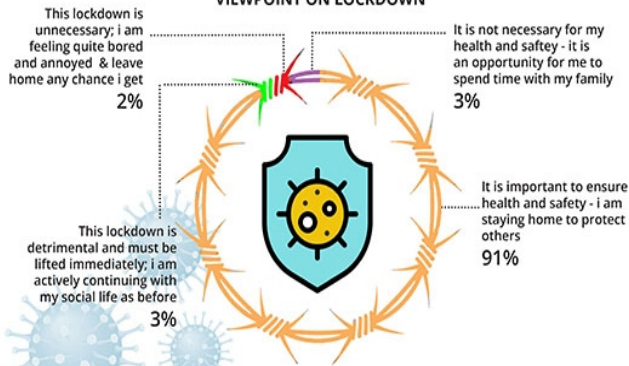




MAJORITY RESPONDENTS (91%) COMPLYING WITH LOCKDOWN TO ENSURE HEALTH AND SAFETY

When asked whether they support the lockdown imposed by the government, 91% of the ICMA Pakistan members who participated in the survey were of the opinion that the lockdown is important to ensure health and safety and are staying home; 3% said that it is an opportunity for them to spend time with their family; 2% find it unnecessary; and 3% find it detrimental and are continuing with their social life.

VIEWPOINT ON LOCKDOWN



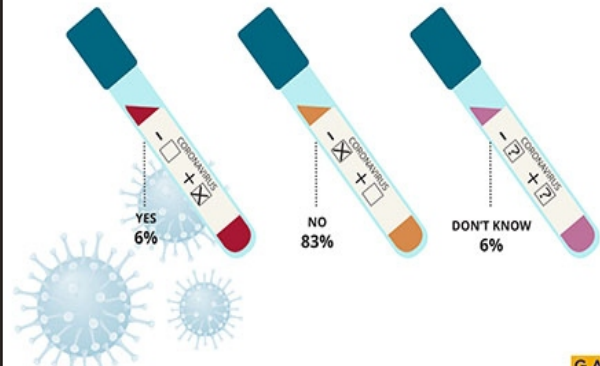
Source: Survey of ICMA Pakistan members on Ease of Doing Business in Pakistan by Gallup Pakistan



ONLY 6% SAY THAT THEIR RELATIVES OR SOMEONE IN THEIR VICINITY TESTED POSITIVE FOR COVID-19

Gallup Pakistan reached out to ICMA Pakistan members to gauge the impact of COVID-19 outbreak on their personal and professional lives. When asked whether any person in their relatives/vicinity tested positive for the COVID-19 virus, a large majority (83%) of the respondents said that none of their relatives or anyone in their vicinity tested positive for COVID-19.

RELATIVE/SOMEONE IN VICINITY TESTED POSITIVE FOR COVID-19



Source: Survey of ICMA Pakistan members on Ease of Doing Business in Pakistan by Gallup Pakistan



NEARLY 7 IN 10 ICMA PAKISTAN MEMBERS FACE DIFFICULTY BUYING ESSENTIALS DUE TO THE LOCKDOWN

When asked if they were finding any difficulty buying essentials from the market during the lockdown period, 7% of the ICMA Pakistan members who participated in the survey stated that they were facing great difficulty in purchasing essential items from the market under the lockdown. Almost one third (60%) of the respondents reported facing some difficulty in purchase of essentials, whereas, one-third (34%) respondents reported facing no difficulty at all.

DIFFICULTY BUYING ESSENTIALS



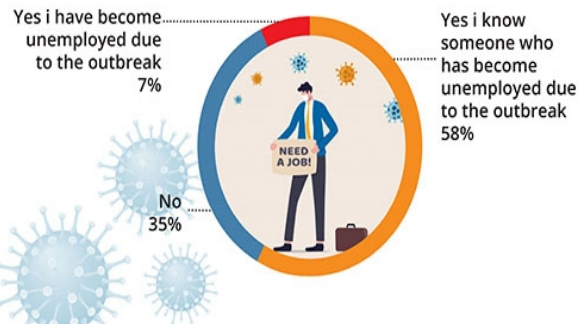
Source: Survey of ICMA Pakistan members on Ease of Doing Business in Pakistan by Gallup Pakistan



NEARLY 6 IN 10 KNOW OF SOMEONE WHO BECAME UNEMPLOYED DUE TO THE OUTBREAK

Gallup Pakistan reached out to 5,000 ICMA Pakistan members and asked "Have you, or anyone you know, become unemployed during the lockdown caused by the Covid-19 outbreak?" Results show that of the ICMA Pakistan members who participated in the survey, 7% lost their employment due to the outbreak and 58% know of someone who became unemployed. 35% of the respondents said that neither they nor someone they know became unemployed as a result of the lockdown.

UNEMPLOYMENT DURING LOCKDOWN



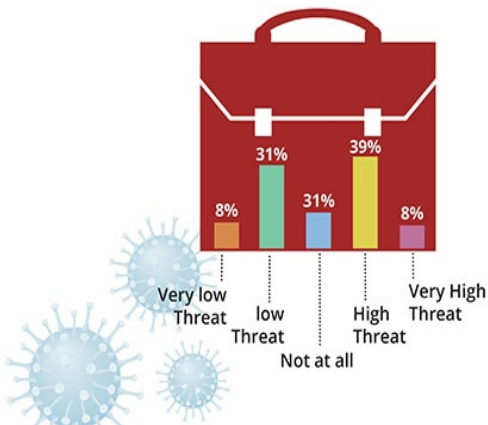
Source: Survey of ICMA Pakistan members on Ease of Doing Business in Pakistan by Gallup Pakistan



FOR NEARLY HALF ICMA PAKISTAN MEMBERS (47%), THE CORONAVIRUS POSES A HIGH THREAT TO EMPLOYMENT OR BUSINESS

When asked to what extent they considered the Coronavirus outbreak as a threat to their job/business, 47% of the respondents reported the virus to pose a high or very high threat to their job/business; and 39% reported it to pose a low or very low threat. For 14%, it posed no threat to their job/business at all.

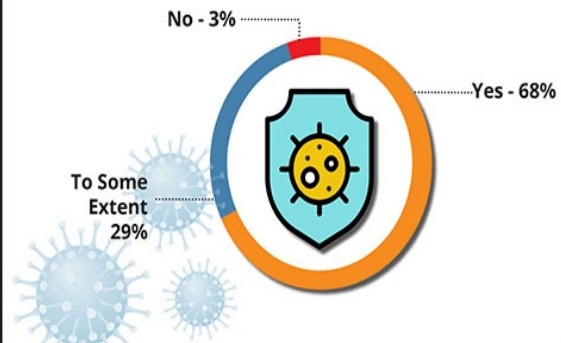
THREAT TO JOB BUSINESS



MAJORITY ORGANIZATIONS TAKING ADEQUATE INTERNAL MEASURES TO PROTECT STAFF FROM CONTRACTING CORONAVIRUS

Gallup Pakistan reached out to 5,000 ICMA Pakistan members to ask regarding the impact of COVID-19 on their personal and professional lives. When asked if their organization is taking adequate internal measures to protect staff from contracting the virus, 68% of the 300 members who participated in the survey said that their organization is taking adequate internal measures to protect staff from contracting coronavirus while 29% said that their organization is taking precautionary measures to some extent. 3% of the respondents said that their organization is not taking any precautionary measures.

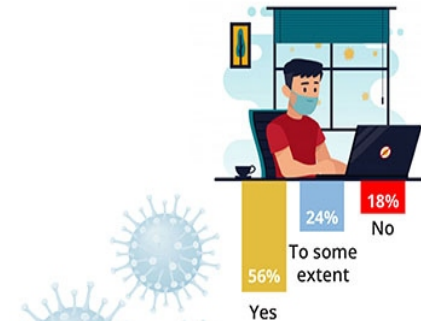
ADEQUATE MEASURES TAKEN



OVER HALF (56%) ICMA PAKISTAN MEMBERS SAY THEIR ORGANIZATION HAS ALLOWED THEM TO WORK FROM HOME

Gallup Pakistan reached out to 5,000 ICMA Pakistan members and asked "Has your organization allowed you to 'Work from Home' during lockdown imposed by the Government?". 58% of the ICMA Pakistan members that participated in the survey reported that their organization has allowed them to work from home; 24% said that they are allowed to work from home partially; and 18% said that they are not allowed to work from home.

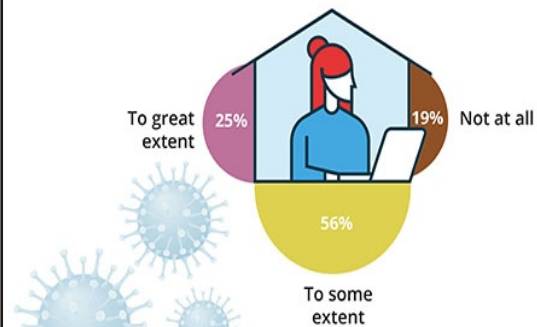
WORK FROM HOME



4 IN 5 ICMA PAKISTAN MEMBERS SAY WORKING FROM HOME WOULD AFFECT THEIR PERFORMANCE AND EFFICIENCY

Respondents were asked to what extent they think 'Working from Home' would affect their performance and efficiency in the long run. Majority (81%) of the respondents said that working from home would affect their performance to some extent and 19% said it will not affect their performance at all.

WORK FROM HOME EFFECT ON PERFORMANCE





NO LAYOFFS IN 3 IN 4 ICMA PAKISTAN MEMBER ORGANIZATIONS

Gallup Pakistan reached out to 5,000 ICMA Pakistan members and asked "Has your organization laid staff off due to the lockdown imposed by the Government?" Of the members that participated in the survey, 26% reported some laying off by their organization due to the government imposed lockdown, whereas 74% reported no layoffs.

LAYOFFS



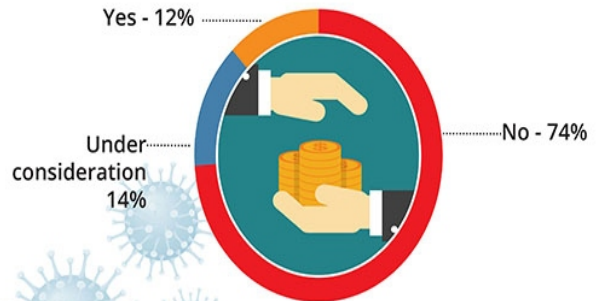
Source: Survey of ICMA Pakistan members on Ease of Doing Business in Pakistan by Gallup Pakistan



3 IN 4 ICMA PAKISTAN MEMBERS NOT RECEIVING REDUNDANCY PAY FROM THEIR ORGANIZATION

When asked if they are receiving any redundancy pay from your organization under COVID-19 emergency period, 12% of the ICMA Pakistan members who participated in the survey said that they are receiving redundancy pay from their organization under COVID-19 emergency period whereas 74% said that they are not receiving any redundancy pay. For 14% of the participating members, redundancy pay was under consideration.

REDUNDANCY PAY



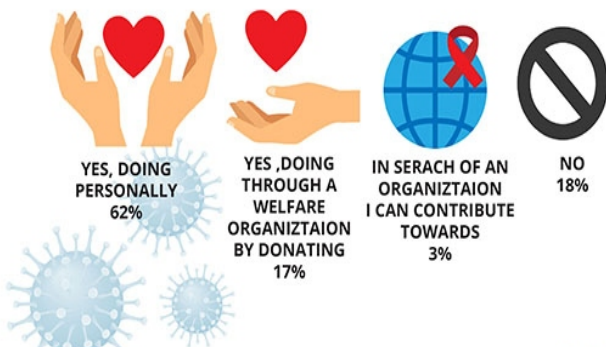
Source: Survey of ICMA Pakistan members on Ease of Doing Business in Pakistan by Gallup Pakistan



4 IN 5 ICMA PAKISTAN MEMBERS PART OF RELIEF EFFORTS FOR PEOPLE AFFECTED BY LOCKDOWN

When asked if the respondents were a part of any relief efforts to provide sustenance to underprivileged people affected by the lockdown, a large proportion (62%) said that they were personally providing sustenance to people affected by the lockdown and another 17% said that they were contributing to relief efforts by donating to welfare organizations. While 3% of the respondents reported efforts to seek out relevant organizations, 18% respondents affirmed that they were currently not involved in any relief efforts.

PART OF RELIEF EFFORTS



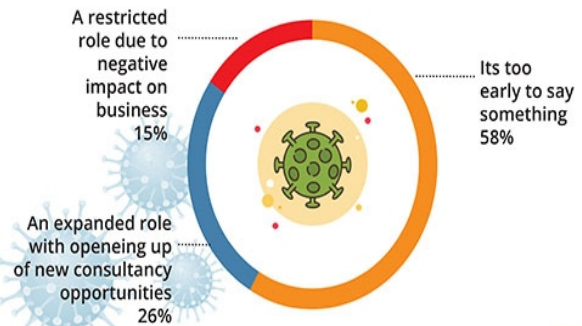
Source: Survey of ICMA Pakistan members on Ease of Doing Business in Pakistan by Gallup Pakistan



ONLY 15% ICMA PAKISTAN MEMBERS BELIEVE PRACTICING MEMBERS OF ICMA PAKISTAN HAVE A RESTRICTED ROLE POST COVID-19

Gallup Pakistan reached out to 5,000 ICMA Pakistan members and asked "How do you see the role of practicing members of ICMA Pakistan in the post-COVID-19 scenario?" 15% of the ICMA Pakistan members that participated in the survey were of the view that in the post COVID-19 scenario, practicing members of ICMA Pakistan will have a restricted role due to the negative impact on businesses; 26% opined that they will have an expanded role with opening up of new consultancy opportunities; and 58% of the members thought that it is too early to say.

ROLE OF PRACTICING MEMBERS OF ICMA PAKISTAN POST COVID 19



Source: Survey of ICMA Pakistan members on Ease of Doing Business in Pakistan by Gallup Pakistan

